

Rapid Recovery Plan

2021

Southbridge, MA





This plan has been made possible through technical assistance provided by the Baker-Polito Administration's Local Rapid Recovery Planning program.





The Local Rapid Recovery Planning (RRP) program is a key part of the Baker-Polito Administration's Partnerships for Recovery Plan, the strategy established to help communities stabilize and grow the Massachusetts economy as a result of the economic impacts brought on by COVID-19. The plan invests \$774 million in efforts to get people back to work, support small businesses, foster innovation, revitalize downtowns, and keep people in stable housing.

In addition to the planning program, recovery efforts include a Small Business Relief Program administered by the Massachusetts Growth Capital Corporation. This program, which concluded in May 2021, provided more than \$687.2 million to over 15,000 businesses across the Commonwealth, with a focus on businesses located in Gateway Cities, among demographic priorities, or operating in sectors most impacted by the pandemic. Cities, towns, and non-profit entities are using Regional Pilot Project Grant Program funding for recovery solutions that seek to activate vacant storefronts, support regional supply chain resiliency, and create small business support networks. To promote recovery in the tourism industry and support the ongoing My Local MA marketing initiative encouraging residents to support their local economies by shopping, dining and staying local, another \$1.6 million in grants were awarded through the new Travel and Tourism Recovery Grant Pilot Program. Through April 2021, MassDOT's Shared Streets and Spaces Grant Program has invested \$26.4 million in municipal Shared Streets projects to support public health, safe mobility, and renewed commerce.

In support of the overall recovery strategy, the Administration made \$9.5 million in awards for 125 communities to create Local Rapid Recovery Plans, through the MA Downtown Initiative Program. These plans address the impacts of COVID-19 on local downtowns and small businesses by partnering with Plan Facilitators and Subject Matter Experts to pursue locally-driven, actionable strategies.

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Acknowledgements



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125 communities participated in the Rapid Recovery Plan Program

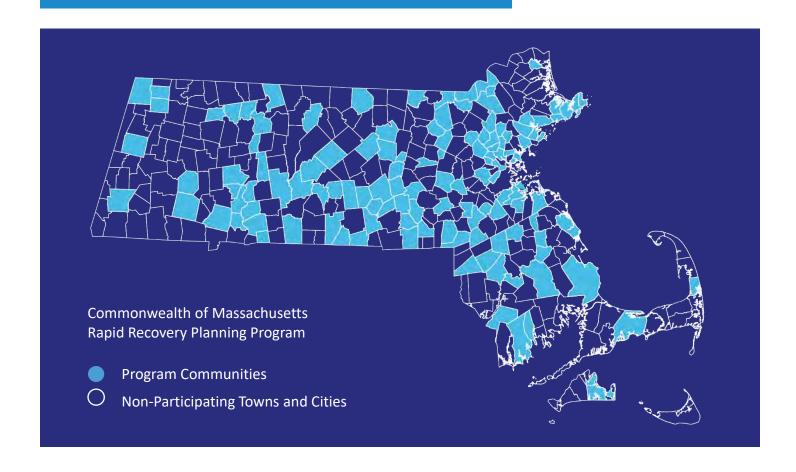
52 Small Communities

51 Medium Communities

16 Large Communities

6 Extra Large Communities

Mass Downtown Initiative distributed nearly \$10 million across 125 communities throughout the Commonwealth to assess impacts from COVID-19 and develop actionable, project-based recovery plans tailored to the unique economic challenges in downtowns, town centers, and commercial districts.



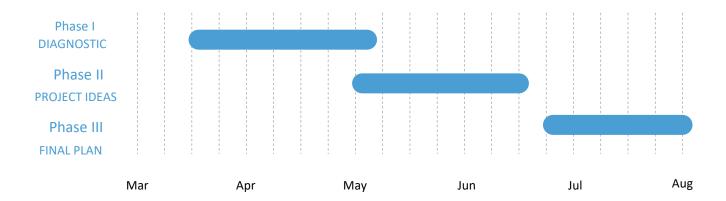
Rapid Recovery Plan (RRP) Program

The Rapid Recovery Plan (RRP) Program is intended to provide every municipality in Massachusetts the opportunity to develop actionable, project-based recovery plans tailored to the unique economic challenges and COVID-19 related impacts to downtowns, town centers, and commercial areas across the commonwealth.

The program provided technical assistance through Plan Facilitators assigned to each community applicant (e.g., city, town, or nonprofit entity) and Subject Matter Experts who supported the development of ideas for project recommendations and shared knowledge through best practice webinars and individual consultations.

Communities and Plan Facilitators were partnered through the program to assess COVID-19 impacts, convene community partners to solicit project ideas and provide feedback, and develop project recommendations. The following plan summarizes key findings from the diagnostic phase of the program and includes a range of priority project recommendations for the community.

Each Rapid Recovery Plan was developed across three phases between February-August 2021. Phase 1 - Diagnostic, Phase 2-Project Recommendations, Phase 3 - Plan.



In Phase 1: Diagnostic, Plan Facilitators utilized the Rapid Recovery Plan Diagnostic Framework that was adapted from the award-winning Commercial DNA approach as published by the Local Initiative Support Corporation (LISC) in "Preparing a Commercial District Diagnostic", and authored by Larisa Ortiz, Managing Director, Streetsense (RRP Program Advisor).

The framework was designed to ensure methodical diagnosis of challenges and opportunities in each community, and to identify strategies and projects that aligned with the interests and priorities of each community. The framework looks at four areas of analysis: Physical Environment, Business Environment, Market Information, and Administrative Capacity - each equipped with guiding questions to direct research conducted by Plan Facilitators.

Rapid Recovery Plan Diagnostic Framework



Who are the customers of businesses in the Study Area?



How conducive is the physical environment to meeting the needs and expectations of both businesses and customers?



What are the impacts of COVID-19 on businesses in the Study Area? How well does the business mix meet the needs of various customer groups?



Who are the key stewards of the Study Area? Are they adequately staffed and resourced to support implementation of projects? Are the regulatory, zoning, and permitting processes an impediment to business activity?

Following the diagnostic in Phase 1, Plan Facilitators, in close coordination with communities, developed and refined a set of recommendations that address priority challenges and opportunities. These project recommendations are organized in clear and concise rubrics created specially for the Rapid Recovery Plan Program. Project recommendations are rooted in a set of essential and comprehensive improvements across six categories: Public Realm, Private Realm, Revenue and Sales, Administrative Capacity, Tenant Mix, Cultural/Arts & Others.















Public Realm

Private Realm

Tenant Mix

Revenue/Sales

Admin Capacity

Cultural/Arts

Other

Executive Summary

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Executive Summary

A Town with a Strong History in Need of Economic Reinvestment

The Town of Southbridge has many assets including the preservation of its rich downtown architecture, diverse community demographics and ethnicities, and valuable natural resources such as the Quinebaug River. This southern Worcester County community was once a booming hub for the manufacture of textiles and cutlery, and later, optics. However, many of these businesses have closed or relocated over the last 20+ years. Even though some of these businesses have remained, there is a gradual economic decline of the community, especially its downtown. Prior to COVID, a significant portion of the population suffered from the ill effects of poverty, including poor health and low educational attainment, and COVID has impacted community health and economic activity even further.

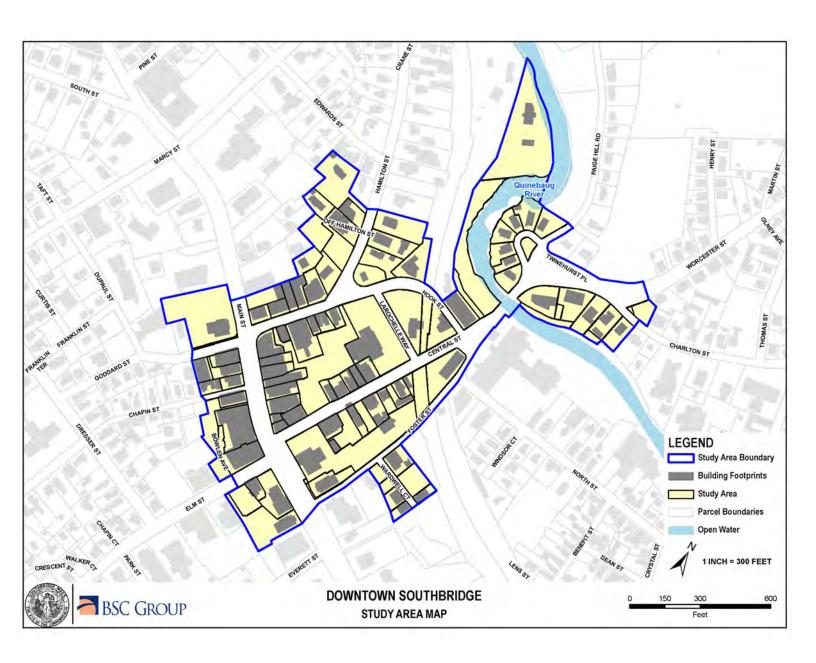
- The major cause of the slow decline is the manufacturing sector which lost about 900 jobs since 2001.
- Other sectors that lost jobs are retail trade, information services and business and professional services.
- All other sectors grew somewhat, with health services, social assistance and accommodation and food services showing the most gains.
- Unemployment in Southbridge has consistently been above statewide averages

Despite this downward trend, Southbridge retains many assets, with many of these assets in or adjacent to downtown. Historic downtown architecture spanning the 18th, 19th and 20th centuries, provides a window into Southbridge's past and a unique and charming character for downtown redevelopment. The culturally diverse population, including persons of French-Canadian, Albanian, Italian, Polish, Greek, and Puerto Rican descent, has been and continues to be one of the town's richest traits. The winding Quinebaug River, is both distinctive and beautiful, and many opportunities exist to highlight its beautify revive the River for recreational use.

Through this LRRP planning process, it became clear that part of building a healthier, more economically viable community, will be to capitalize on these assets as a means of addressing community deficiencies. These assets along this approach, have been identified in previous planning documents, such as the Southbridge Master Plan and Downtown Urban Revitalization Plan. This LRRP document provides prioritized recommendations with specific actions, processes and identification of potential funding and partnerships to accomplish the needed changes. There is a need to re-establish pride and to become more optimistic about the town's future -- to believe that things can be improved -- otherwise residents' apathy and negativity will add to the inertia and act to block progress from occurring. Some of the major themes include:

- Promote Southbridge's diversified economy to provide more job stability and less dependence on any single sector.
- Promote Southbridge's strong industrial heritage of buildings and sites.
- Recognize that Southbridge has a fine heritage of handsome commercial buildings downtown.
- Enhance the role of tourism and become a destination for special events and features in providing jobs and generating income.
- Enhance and provide access to valuable open space resources such as the river and former railroad that should become a rail trail
- · Embrace, promote and provide incentives for the establishment and expansion of minority businesses
- Increase outreach to and engagement of the growing Latinx population.

Southbridge Study Area



Map of Southbridge project area; Source: BSC Group

Project Recommendations

Recommendation	Description	Project Category
Extension of Existing Quinebaug Valley Rail Trail	Steps to finalize plans for the rail trail including connections to the Quinebaug River and abutting communities	Public Realm
Safety, Accessibility & Multi Modal Complete Streets Improvements	Pursue Complete Streets policy and funding to address inadequate sidewalks and crosswalks	Public Realm
Celebrating Public Art in Downtown	Develop a public art program, identify local artists and secure grant money to commission public art	Public Realm
Placemaking including signage and façade improvement program	Build-up the Town's façade and signage improvement program to reinforce downtown placemaking by building on the downtown's unique architectural character	Public Realm
Encourage Outdoor Dining	Review current regulations; craft updated regulations; Understand which restaurants may be interested	Private Realm
Address the need to fill the high level of vacant storefronts	Advice on attracting businesses into Downtown	Private Realm
Branding and Coordinated Marketing of the Downtown Business District	Develop a program for advertising and marketing for businesses as well as the Downtown in general	Private Realm/ED
Foster Growth and Resources for Spanish-Speaking Businesses and Residents	Recommendations to engage diverse stakeholders and addressing language barriers	Private Realm/ED
Adopting New Technology or Coaching for Business Owners to Increase Sales	Increase performances, special events and pop up restaurants/retail in downtown	Revenue / Sales
Organize & Support Capacity of the Downtown Business Community	Set a framework within which downtown businesses organize their activities and marketing as sub-group of the Southbridge Business Partnership and attract more minority business participation to participate	Admin. Capacity







Pavement mural art in Town. Source: Flickr

Diagnostic

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Key Findings



The Town's customer base is young and somewhat well-educated

The LRRP study area in downtown Southbridge is home to only 242 residents, while the total population is of Southbridge is 16,613. The education level in the study area shows 9% of residents age 25+ having earned an bachelors degree or higher, and 70% of residents age 25+ at least having completed high school or GED equivalent. The education levels for all of Southbridge shows 18% of residents age 25+ having earned an bachelors degree or higher, and 83% residents age 25+ at least having completed high school or GED equivalent.

Median household income in the study area is \$35,700, placing it much lower than the median household income throughout Southbridge which is \$50,800. These numbers place Southbridge on the lower end of neighboring communities of Dudley, Sturbridge, and Charlton. The median age in the study area is 34, and 40 in the entirety of Southbridge.

28% of the population in the study area is under age 19 and 12% is 65 years or older. 23% of the population in the entirety of Southbridge is under age 19 and 18% is 65 years or older. This makes the town have an average young population and slightly older population than its neighbors Dudley, Sturbridge, and Charlton.

Source: ESRI Demographic Indicators, 2020



Downtown is rundown and in need of new life

The downtown study area of Southbridge was established along route 131 Main Street and Central Street which connects to route 169, making it a highly trafficked area with many businesses and restaurants built along the main thoroughfare. There was also a railroad line which once serviced the area but has since been removed. The old train station is currently the location of a MassDOT Registry of Motor Vehicles (RMV) customer facility. There is a small park near the study area, several municipal lots, several restaurants, financial institutions, health services, retail businesses, and religious institutions. The appearance of the study area is somewhat rundown.

Southbridge's Main Street is well-traveled with nearly 15,000 vehicles traveling the route daily, and Central Street has nearly 5,000 vehicles travel the route daily (*MassDOT, 2019 Traffic Counts, Main Street at Montvale Ave*). Stakeholders comment that the there is a shortage of on-street parking, and that traffic can be inefficient on weekends.

The Quinebaug River runs through the study area, and access points abutting the river could be cleaned up to help celebrate the river as an attractive feature. There could be a trail or something which connects the public back to the waterway, and visual connections for the river should be highlighted too.

As part of the LRRP, the Southbridge study area was assessed and received the following scores for the following features (A, B, C, or Fail): Sidewalks: C; Street Trees and Benches: C; Lighting: C; Wayfinding: B; Roadbed and Crosswalks: C. However, Main Street is being reconstructed, and other streets are in design for reconstruction over the next few years, meaning the grades for the public realm will improve dramatically.



Business is floundering, but recent planning has made steps to revive it

The Southbridge study area includes 101 storefronts including retail, restaurants, banks, and offices. This represents approximately 149,500 square feet of uses along primary street space according to the Town's Assessor's database. There were 24 vacant storefronts, and several vacant developable lots as identified during April and May 2021 site visits. There have been temporary and permanent business closures identified that were related to the impacts of COVID-19.

Currently there are 60 businesses that operate within the Southbridge study area. Services such as personal care represent the highest proportion of businesses in the downtown at 39% followed by accommodation and food services (21%), healthcare and social services (9%), finance and insurance (9%), and retail services (6%).

Stakeholders and business owners say how the business community has been very affected by COVID-19. Through common methods such as online ordering and curbside pickups, many businesses were able to remain open throughout the majority of 2020 and into 2021. Shipping and the limited availability of raw materials has affected many businesses.

Besides recent effects from COVID, several locally owned businesses have closed due to retirement or natural attrition, with no one to buy or take over the business. In addition to this, there is an unemployment issue throughout Southbridge, where people say they can make more money by staying home and remaining on unemployment. To further exacerbate the problem, a substantial part of the population is represented by people who are affected by drug addition. In response to this, there are several drug related assistance programs and religious institutions situated in the study area which are located on ground floor storefronts. It should be noted that some of these non-profit businesses claim to be the most effective where currently located, however they also take up valuable real estate for other types of businesses.

As part of the LRRP, storefronts within the Downtown Southbridge study area were assessed and received the following scores (On the scale of A, B, C, or Fail): Storefront windows: B; Outdoor displays/dining: B; Signage: C; Facades: C; Lighting: B.



The Town has started downtown organization overseeing recovery efforts

Southbridge has an active Redevelopment Authority and Planning Board. Town staff includes CDBG Grant Coordinator, Economic Development and Town Planner. There are many goals the Town staff, boards and stakeholders would like to implement within the study area. The Town has expressed an interest in giving a greater exposure to the arts, diverse population, access to the river, the rate access to the river in addition to a "Rails to Trails" trail.

There already have been some effort put into marketing the businesses in the area. The local administration has reached out to business owners, met with potential developers and business startups, and has been promoting the availability of usable space in downtown.



Highlights from the Physical Environment

A Charming Downtown Center

Downtown Southbridge still has many of its original brick buildings from the turn of the 20th Century. The architecture and pedestrian scale, is hard to replicate today.

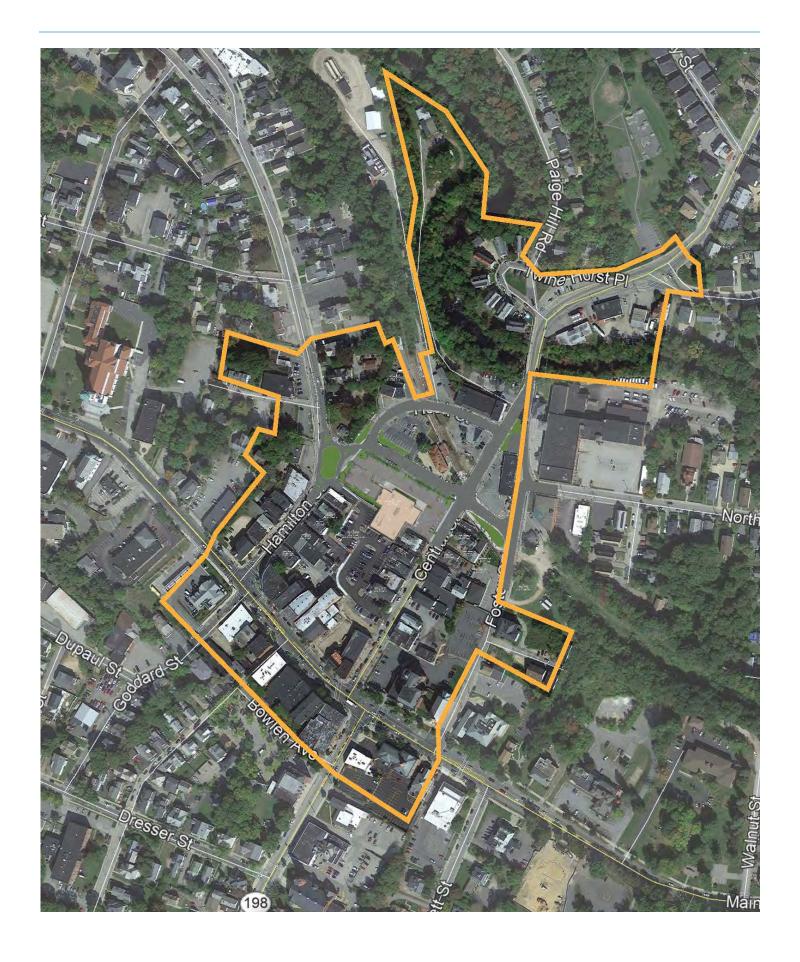
There is a theatre located in one of the buildings on Main Street, however, the property owner has not invested in the property to maintain it. There are lots of windows, for shoppers to peak inside. There are wide sidewalks that could accommodate outdoor dining should restaurants open in the downtown center.

Available Parking

There are a number of public parking lots and on-street parking spaces in downtown. There is a large municipal parking lot near the old train depot which is currently serving as a MassDOT RMV branch. The Town hosts events in this parking lot, including food trucks. The Central Street parking lot was recently upgraded and includes a new event space for music performances, pop-ups, and potentially community art projects. There is also a public parking facility behind the buildings along the south side of Main Street. Though there are a number of downtown parking spaces, the residents frequently state there are not enough spaces, and as more businesses and office uses come into downtown, increased parking needs may become an issue.



Buildings on Central Street; Source: BSC Group



Map of Region; with Southbridge Study Area outlined in Blue. Source: ESRI GIS



Old Train Depot. Source: BSC Group

The Town has one park, and could use more open space amenities

Joe Capillo Park

Just north of the study area is Joe Capillo Park. The park contains some active use elements, such as skatepark and basketball court. The Town has recently applied for a grant to improve park access and lighting. The park is accessible along sidewalks and has a parking lot for those who prefer or need to drive to the park.

Great potential for a Rail Trail

There is an abandoned rail line that transects the study area and at points runs close to the river. The Town has engaged with MassDOT to understand what would be required to turn this area into a shared use path. The Town has now put a concerted effort into working with MassDOT, who owns the former rail bed, to finally get an agreement in place to lease the property, prepare a full trail design, fund and build a trail on their property.

Rail Trails have spurred economic activity in nearly every community which has converted the trail. They are even more important now because of the mental health benefits and the physical activity it provides to residents of all ages. There may be opportunities to highlight other assets of the Town, including the charming train station, the river, and potentially public art.

Quinebaug River

The Quinebaug River is a unique resource in downtown that has a lot of potential as an open space asset, visual amenity and recreational element. Presently, there is no public access to the river, and visual connections are very limited. Opening up public access to and use of the river for recreational purposes would be a great feature for residents as well as an element that would draw visitors into downtown.



Joe Capillo Park. Source: Google Maps



Highlights from the Business Environment

High Number of Vacant Storefronts

As of May 2021, the Town of Southbridge had 24 storefront vacancies within the study area. This is a very high rate and pre-existed COVID19 conditions.

Up until the 1980s, Southbridge was home to the very successful eyeglass manufacturer, American Optical (AO). When this anchor institution shutdown operations in the Town, many businesses found it hard to survive. Due to the challenging geographic location, south of Sturbridge, not immediately abutting a major highway, and with a population of less than 20,000 residents, it continues to be a challenging business environment.

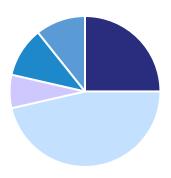
Underutilized Retail Space

A high percentage of ground floor space in downtown is dedicated to social service providers such as addiction services, driving schools, and job assistance. Additional ground floor retail space is occupied by houses of worship. The foot traffic that is generated by these types of businesses do not tend to spend discretionary income at some of the retail stores located downtown. Though these social service agencies are needed in the community, they are not reliant on foot traffic, and could be located in other spaces if there was a higher demands for retail space.

There are only a few restaurants in the study area. There was very little outdoor dining despite adequate space to accommodate that option.

There is plenty of parking both on street and in municipal lots for visitors to patron the businesses in the downtown area.

No. of Businesses



- Lodging & Dining
- Lash, Nail, Salon
- Retail
- Healthcare & Social Assistance
- Finance & Insurance

Mix of business by NAICS category. Source: US Census Bureau



House of Worship, Iglesia Casa de Amor y Gloria, corner of Maine Street and Hamilton Street, Photo credit: BSC Group

Project Recommendations

Recommendation	Project Category
Extension of Existing Quinebaug Valley Rail Trail	Public Realm
Safety, Accessibility & Multi Modal Complete Streets Improvements	Public Realm
Celebrating Public Art in Downtown	Public Realm
Placemaking including signage and façade improvement program	Public Realm
Encourage Outdoor Dining	Private Realm
Address the need to fill the high level of vacant storefronts	Private Realm
Branding and Coordinated Marketing of the Downtown Business District	Private Realm/ED
Foster Growth and Resources for Spanish-Speaking Businesses and Residents	Private Realm/ED
Adopting New Technology or Coaching for Business Owners to Increase Sales	Revenue / Sales
Organize & Support Capacity of the Downtown Business Community	Admin. Capacity

Extension of Existing Quinebaug Valley Rail Trail

Public Realm Category Abandoned rail bed from intersection with Route 131 to intersection with Rte Location 131/169 Origin Town staff, LRRP facilitator, Open Space and Recreation Plan Large Budget (>\$200,000) - Planning & Design: \$250K - \$1M; Construction (\$1.5 M Budget - \$3.5 million) depending on construction funding Timeframe Short Term (1 – 5 years) Medium Risk - requires coordination with MassDOT (owner of Risk abandoned rail bed) to enter into a 99-year lease agreement Obtain agreements with MassDOT to allow a trail to be constructed within their right-of-**Key Performance Indicators** way; obtain funding for a feasibility study; source of construction funding & requirements Town Administrator, Planning, Economic Development, Recreation Department, Department of Public Works, MassDOT



Grand Trunk Trail; Source: https://www.onlyinyourstate.com/massachusetts/grand-trunk-trail-ma/

Partners & Resources

Diagnostic

Currently, the only open space asset in downtown is the Town Common located on the eastern edge of downtown. The Common is a great facility that hosts many community events. However, it is on the fringe of downtown, not within the core commercial area, and events at the Common have limited ability to help boost economic activities in the commercial core of downtown.

Down Southbridge itself has several assets that can be transformed into valuable open space assets. The abandoned Grand Trunk Rail Line (i.e. Quinebaug Valley Rail Trail) runs through the center of downtown and has been proposed to be converted to a multi-use trail for over twenty years. The abandoned rail bed is currently owned by MassDOT, and recently, the Town has taken steps to begin the process of converting this corridor into a multi-use trail and provide public access to the Quinebaug River.

This project is a key component to the economic revitalization of the downtown. The LRRP project, stakeholder interviews and public presentation highlighted the need for downtown Southbridge to become a destination. The development of the rail trail, riverfront park and formal access to the river will all contribute to the vitality of the downtown as an asset and attractive destination.

Action Item

Explore the feasibility of converting the existing abandoned rail bed as a multi-use trail using the following approach:

Stakeholders: form a committee of partners to help promote the feasibility of a multi-use trail that will extend the existing system from the intersection with Rte 131 to the intersection with Rte 131/169 and into the downtown area. Members would include, but not be limited to, representatives from the Parks Department, Conservation Commission, Planning, Economic Development, Senior Housing, Public Works, Fire Department, Police Department, local bicycle advocates, the business community and a local resident

Right-of-Way: Reach out and coordinate with MassDOT to enter into a long term (ex. 99-year) lease for the purpose of converting the existing abandoned rail bed into a multi-use trail. In addition, provide a safe and enjoyable experience for users, access to the Quinebaug River; allow DPW and Parks to maintain the corridor, and Police to enforce illegal behavior.

Recommendation: Appropriate local funds to complete a Feasibility Study of the abandoned rail bed corridor to determine the possibility of converting to a multiuse trail including surface type, access points, costs and funding options. Enter into a long-term lease with MassDOT.

Process

Rail Trail:

- Apply for funding to develop a Feasibility Study to assess existing conditions, investigate possible alternatives, surface types and access points. Items to be considered as part of the study include options to navigate around Main Street (ex reuse existing train bridge vs on-road); connection at Crane Street and Westville Dam; access points to the trail; connections to key points/destination; and wayfinding
- Coordinate with MassDOT to enter into a long-term (ex 99-year) lease that will allow the Town outlines the details of converting the existing abandoned rail bed to a multi-use trail including access, safety and hazardous material liability and mitigation and maintenance. This agreement will require the assistance of legal counsel.

Process (continued)

- Conduct the Phase One Site Assessment of the rail bed to better understand the potential of any site contamination.
- Secure funding for the preparation of design and bid-ready documents for the construction of the trail. This may require topographic survey, wetland delineation, environmental permitting, preparation of preliminary/final designs, approvals from various local, state and/or federal agencies, bidding and construction including oversight and record drawings.

Quinebaug Riverfront:

- Take actions to acquire the property along the Quinebaug River as identified in the Downtown Southbridge Urban Revitalization Plan
- Apply for and secure funding for parcel acquisition. Cost would include but not be limited to site assessment to determine any contamination issues, land acquisition, legal fees, design/construction of phase one improvements for the new Riverwalk and if possible, the new Riverfront Park.
- Secure funding for the preparation of design and bid-ready documents for the construction of the Riverfront Park. This may require topographic survey, wetland delineation, environmental permitting, preparation of preliminary/final designs, approvals from various local, state and/or federal agencies, bidding and construction including oversight and record drawings.



Trail head; Source: Google Maps



Grand Trunk Trail on left of the Westville lake and dam; Source: https://upload.wikimedia.org/wikipedia/commons/4/4b/USACE_Westville_Lake_and_Dam.jpg

Safety, Accessibility & Multi-Modal Complete Streets Improvements

Category	Public Realm
Location	Town-wide
Origin	Town staff, LRRP facilitator, Open Space and Recreation Plan
Budget	Medium Budget (<\$200,000) – Planning & Design: \$50K - \$150K; Construction (\$250,000 - \$400,000) thru Complete Streets and/or Shared Streets Grant
Timeframe	Short-Term (0 – 5 years)
Risk	Low Risk – all projects within public right-of-way
Key Performance Indicators	Town staff completes complete streets training; develop and adopt complete streets policy; apply for technical assistance; identify all potential projects within public right-of-way as part of 5-year plan for approval; apply for construction funding
Partners & Resources	Town Administrator, Economic Development and Planning, Recreation, Department of Public Works



Credit: BSC Group

Diagnostic

With a population of nearly 18,000, the Town of Southbridge maintains a public library, three public elementary schools and a middle/high school. In addition to Town Hall and the Senior Center, the town supports several athletic fields and parks, and a public swimming pool.

The Town also boasts a vibrant and active downtown area that includes several restaurants, shops, a theatre, a hospital and conference center.

With an aging population remaining active in their later years, a general population that continues to increase, youth sports programs on the rise and COVID-19 cases declining, there is every indication that life in Southbridge is returning to normal.

As folks continue to return to work, school, engage in social activities and events, dining, shopping, recreating, etc., the need for safe and ADA-compliant sidewalks, pedestrian crossings and intersections.

Action Item

Develop a 5-year plan to identify and prioritize projects that will bring sidewalks, pedestrian access ramps and crossings (signalized, non-signalized and mid-block) to current ADA/AAB standards and close sidewalk gaps at various locations throughout town using the following approach:

Training: Identify key town staff to attend Complete Streets training through the Umass Transportation Center

Policy: Develop a Complete Streets policy with input from various stakeholders including Planning, DPW and Recreation with endorsement from the Town. Submit to MassDOT for approval.

Technical Assistance: Apply for technical assistance funding from MassDOT to develop a 5-year Prioritization Plan including order-of-magnitude construction costs and duration.

Construction Funding: Apply for construction funding for up to \$400,000 per cycle to implement projects developed as part of the 5-year Prioritization Plan.

Process

Upon award of construction funding through the Complete Streets grant program, initiate the following:

Design & Bidding: Prepare designs as required including detailed cost estimates and special provisions to the MassDOT Standard specifications and bid documents to solicit and hire a MassDOT pre-qualified general contractor to implement the work.

Construction: Coordinate with selected contractor to develop a construction schedule and notice to proceed. Town is responsible for review of shop submittals, pay requisitions, change orders, administration and project closeout.

Other Funding: Investigate potential construction of projects in the 5-year plan using funding from the Shared Streets and Open Spaces grant also managed by MassDOT.

Celebrating Public Art in Downtown

Category



Public Realm

Location

Southbridge Downtown

Origin

Planning Staff; Residents

Budget



Low Budget (\$25,000 +/-)



Medium Budget (\$50,000 - \$100,000) - Phase 2

Timeframe



Short Term - Phase 1 only. 4-12 months to start, ongoing Temporary art efforts (pavement painting, sidewalk chalk events) can occur in late fall 2021 and beyond, depending on capacity to plan and organize.

Risk



Low Risk - Minimal political and financial risk with opportunity for high gains. Liability for mural creation (insurance needed by artists or through blanket Town coverage).

Key Performance Indicators

Number of new murals in the Downtown. Increased foot traffic by residents and visitors. Increased sales and store/business visits by customers. Number of participants at temporary art festival or event days. Number of social media likes, impressions, forwards. Number of collaborators for project (businesses, nonprofits, etc.)

Partners & Resources

Planning Department, Town Council, Parks & Recreation, Southbridge Farmers Markets, Optical Heritage Museum, Business Partnership, Trails Committee, Commonwealth of MA Registry of Motor Vehicles, Harrington Hospital, U Mass Medical, Artists, Public Schools, Local and regional community nonprofits and service organizations, Downtown businesses and property owners (providing space and walls for public art), Sturbridge Area Tourist Association, Discover Central Massachusetts



A mural located in downtown Southbridge

Diagnostic

The impacts of the Covid-19 Pandemic on Southbridge require a recovery plan that diversifies the range of destinations in Downtown and seeks to enhance the image of the town to attract visitors visiting the area from regional historical and natural destinations, including Town trails, the Blackstone Valley, and the Sturbridge areas. The Town of Southbridge has a number of underutilized public spaces that are adjacent to businesses and are highly visible. In addition, there are plans for the completion of a rail trail through the center of Downtown. There is a central parking lot, a number of downtown alleyways, and a large parcel near the RMV headquarters, which is in the old rail depot building, which is on the National Register of Historic Places. A public art program that includes an inaugural series of five murals and related activities and temporary art events can attract customers to downtown and increase vibrancy in support of business recovery and a renewed image for the town.



Crosswalk in Stoneham Square. Photo Credit: BSC Group

Action Items

Create a Public Art Program Working Group, develop a concise plan for quick action items and a branding and marketing strategy. The public art program would include identified parcels for murals, pavement paintings, and functional art, as well as opportunities for pop-up and temporary artwork. A defining feature of this program will be collaborative and diverse nature of project partners, enabling the project to draw from a wide range of resources, champions, and organizers, while ensuring positive impacts for a range of downtown and community goals.



Example of public art located in a public place

Process

Phase 1

- 1. Form a Working Group of 12-16 members to guide and advise the Town on the public art project. Group should include:
 - Town Planner (lead)
 - Economic Development Planner (lead)
 - Business Partnership member
 - Parks & Recreation staff member
 - Trails Committee member
 - Local business representatives
 - Hospitals
 - Other major employers
 - Banks
 - One or two major property owners in downtown
 - One or two area artists
 - Public Schools art teacher or art department head
 - Executive Director of a community nonprofit that focuses on public health or teen services
- 2. Hire a graphic designer/branding professional to develop a project name, logo and social media template for the project. Contract should give ownership of all materials to the Town, and designer should provide all graphics, fonts, and files for future use by the Town and Working Group.
- Using the details in this project recommendation, create a succinct PPT presentation with overall goals, possible preliminary locations for permanent and temporary art, information on Working Group, and timeline for Phase 1 of the project, and funding needs. Include expected benefits for downtown and for the community.
- 4. Garner support and get feedback and ideas. (Make necessary presentations, e.g., Town Council, Community, Business Partnership meetings, regional tourism groups, etc.)
- 5. Identify Town projects that could incorporate art, including wayfinding and signage that could incorporate art on the back of freestanding signs or include historical info, poetry, etc.
- 6. Using Town Assessor data, contact building and property owners/managers with information on the project and requests for interest from those who wish to provide a wall or spot for public art. Be clear about the "ask" and outline how liability is to be addressed (often a sticking point for property owners). Also outline guidelines for public art content or themes for owners.
- 7. Set criteria for public art locations and create a map showing all possible locations with type of art project suitable. Criteria should include:
 - Availability of wall, land, location, and willingness of owner (public or private) to participate in program.
 - Visibility of location first five murals should be in prominent locations.
 - Number of people passing by in cars or as pedestrians/cyclists for maximum impact.
 - Availability of scattered locations of artwork to entice visitors to explore the different parts of downtown and stores and restaurants.
 - Ability to connect murals and public art through a public art trail or treasure hunt.
- 8. Develop a plan for temporary events for late fall 2021 OR wait for permanent mural project implementation in spring 2022.
- 9. Secure a minimum of \$25,000 for funding phase 1.
- 10. Develop an RFP for mural artworks with clear guidelines and locations for five inaugural murals. Include photos of locations, overall theme if applicable, and guidelines for content, timeline, artist credentials, etc. Decide on criteria for artist eligibility: local, experience with a certain number of murals, etc.? Consider requiring artists to run a half-day workshop or actual temporary art session outside in the downtown to kick-off mural painting contributing to a public art event at the project kick-off.
- 11. Consider using the selection process as a public outreach/marketing opportunity Working Group assessment of proposals could be a public event, or all entries could be displayed in public locations on posters for feedback from community before final deliberations. Be clear on process in the RFP. Announce selected artists and murals through social media and other channels.
- 12. Contract with the five artists and begin mural work in late spring 2022, depending on weather and other conditions.
- 13. Create a map showing the five mural locations and other murals and pubic art in the downtown, update regularly as the public art program progresses. Consider creating a downtown treasure hunt with public art/murals at different scales and in hidden places to attract visitors and customers throughout the downtown (ensuring businesses benefit from public art program).
- 14. Plan for a series of events to celebrate the mural work including:
 - Start-up day events including artist-led sidewalk chalk activities.
 - Do video and photo documentation to post on Facebook, Instagram, and in other ways for the duration of the project.
 - Completion festival (develop strategies for this festival to support local businesses by creating a passport for various destinations in town, featuring local businesses on the mural map, etc.)

Process (continued)

Phase 2:

- All steps will be determined after the first phase is underway. This work would include:
 - Planning and coordination for future regional trails connections/markers at trailheads and along paths using public art to market Southbridge Downtown and Public Art Destinations.
 - Expansion of initial murals project to include sculpture, light art, and public events with a broad mission to support the vibrancy and economic health of downtown and local businesses, as well as public health and teen mentorship opportunities:

Project Examples:

Punto Urban Art Museum

Salem, MA

The Punto Urban Art Museum (PUAM) is a project of the North Shore Community Development Corporation. Located in three blocks of the Punto neighborhood in Salem, the project features 75 large-scale artworks by 30 world-renowned and 25 local artists.

The project has two goals:

"By creating a walkable, curated open air museum within three neighborhood blocks, the district is readily accessible to all that downtown Salem already has to offer to over a million tourists per year."

"Bringing a fraction of Salem's visitors to the Point neighborhood stands to be a transformative economic development boom to immigrant-owned local businesses."

The goals of this project are similar to goals in Southbridge – to celebrate the community and to create connections between locations – in the case of Southbridge, to create a destination for visitors and entice people to explore local businesses and support economic development.



Source: http://puntourbanartmuseum.org/mural/the-queen-of-the-block-2/; Artist: MR Cenz



Source: http://puntourbanartmuseum.org/mural/garden-boy/; Artist: Pixel Pancho

Encourage Outdoor Dining

Private Realm Category Location Southbridge Downtown Origin Town staff, stakeholder interviews, LRRP facilitator Budget Low budget (< \$50,000) – consultant and/or staff time Timeframe Short Term (<5 years) Low Risk Risk More restaurants and cafes finding ways to accommodate outdoor seating on **Key Performance Indicators** their property Economic Development Department, Planning Department, Planning Board; Partners & Resources Building Department; Board of Health



 $Restaurants\ using\ sidewalk;\ Source:\ https://la.eater.com/2020/5/29/21275280/la-alfresco-outdoor-dining-sidewalks-parking-lots-coronavirus$

Diagnostic

Outdoor dining and outdoor retail options in local commercial districts expanded during the early days of the COVID-19 Pandemic as towns and cities made a quick pivot to respond to the needs of businesses and residents. Understanding potential benefits to long-term community health and economic development, many businesses and communities now seek to make permanent the temporary outdoor dining and retail options that have sprouted up in their commercial areas.

Pre-COVID, there was limited availability of outdoor dining within the Southbridge study area. However, with the on-set of COVID, many restaurants now understand the health benefits associated with outdoor dining and a few created areas where tables could be placed outside. More restaurants need to be encouraged to provide outdoor dining, and the Town needs to promote the benefits of outdoor dining. Outdoor dining can create a healthier atmosphere for eating and socializing due to free-flowing air and the space for areas where social distancing may be better accommodated compared to an indoor confined area. Furthermore, outdoor dining may also allow a restaurant of café to have more seating, or at least the same amount of seating if indoor tables and seats become more separated.

The addition of outdoor seating, tables and the amenities that accompany them can create or enhance spaces that are more pedestrian scaled and appealing to customers. The visual attractiveness of outdoor umbrellas, tents and dining spaces will draw more attention to the abutting restaurants. Furthermore, the Town should ensure outdoor dining and retail options are created with some semblance of aesthetic order and that they meet safety standards. The semblance of aesthetics needs to work in harmony with downtown branding, placemaking, public art and streetscape improvements that the town also wants to promote. All these elements need to work harmoniously

Another issue raised dung the LRRP diagnostic and stakeholder interviews is that Downtown Southbridge is not a "destination". More downtown restaurants could help is become more of a dining destination. Outdoor seating will help draw attention to the dining locations, helping the economic viability of such commercial activity, and hopefully encourage more dinging investment in downtown along with our investments mentioned in this report to make downtown a destination for a variety of activities.

Action Items

Key components of this recommendation include:

The State's Local Rapid Recovery Program stimulated many questions of outdoor dining and retail, such as enacting permanent ordinances, providing clear design guidelines, offering assistance on use of materials and perhaps even bulk purchasing, compliance with ADA, and navigating local and state regulations. In response to these concerns, the LRRP program assembled a Toolkit that presents the most common questions in the LRRP and provides a guide for each community to move forward in creating its own set of guidelines for businesses and internal streamlining of requirements

Some of the actions from this toolkit that are most relevant in helping Southbridge encourage restaurant and café owners provide outdoor seating are:

Page 51 — explain how outdoor dining areas can help revitalize both restaurants as well as larger business districts. Explain the benefits of offering outdoor dining. Explain that as more restaurants provide outdoor seating in downtown it benefits the economic vitality of the entire downtown, not just their business. Show how the Town can help with permitting and actions to minimize business investment.

Pages 36, 49 and 53 – explore and promote funding sources to help businesses invest in any additional materials and improvements that may be needed to provide outdoor dining. Bulk purchasing may be something the Southbridge Business partnership could help with.

Cross-support actions – outdoor dining, branding, placemaking, public art, murals, streetscape improvements and new public open spaces should all work cooperatively to cross support each other, outdoor dining can certainly benefit from incorporating and taking advantage of all these other actions being contemplated and acted on by Southbridge.

Process

Assemble information to provide to businesses to explain the benefits of offering outdoor dining and how to go about implementing it. The information could be the attachments noted within this LRRP topic or a summary prepared by the Town.

The Town should determine the resources it can provide relative to helping restaurants or cafes create outdoor dining and seating areas. This includes guidelines of how to use sidewalks, public spaces such as the new plaza at the central street parking lot, the process for transforming an on-street parking space for seating, etc.

Provide recommendations of funding sources and group purchasing that may help businesses finance their needs to provide outdoor dining.

Integrate outdoor dining into actions for branding, placemaking, murals and public art, and visa-versa.

Define the process to obtain permit(s) for outdoor dining.

Make a presentation to the Southbridge Business Partnership to explain all the above.

Attempt to get all these items in place over the winter of 2021-2022 so that business can prepare to open in early spring 2022 with outdoor dining as an option.

Reference Material

https://www.abettercity.org/assets/images/Tactical%20Public%20Realm%20Case%20FINAL%20Reduced.pdf



 Pop-up parklet in Mattapan Square Source: A Better City, Tactial Public Realm Report Case Studies



Source: A Better City , Tactical Public Realm Report Case Studies

Engage Property Owners and Attract Diverse Businesses Downtown to Promote Active Ground Floor Uses

Category	Private Realm
Location	Downtown Southbridge
Origin	Diagnostic phase findings; Town staff; Stakeholder engagement
Budget	Medium Budget: Funds will be required to support staffing of the project on an ongoing basis
Timeframe	Medium Timeframe - The establishment of the project is short-term, however successful implementation will depend on other efforts underway to build the local market (e.g., housing units in the pipeline, public realm improvements, etc.)
Risk	High Risk - Even with a variety of financial subsidies, activation programs, and more staff technical support, it's uncertain how many 'brick and mortar' businesses are ready and willing to locate in downtown Southbridge
Key Performance Indicators	Number of vacant storefronts filled with new tenants; SF of upper floor space brought onto market for residential or commercial uses; number of new businesses and property owners using incentive programs
Partners & Resources	
raithers & resources	Town of Southbridge Planning & Economic Development Department; Southbridge Redevelopment Authority; Worcester Chamber of Commerce,; Southbridge Business Partnership; local property owners, developers, real estate professionals; and small businesses Potential Funding Sources:
raithers & nesources	Southbridge Redevelopment Authority; Worcester Chamber of Commerce,; Southbridge Business Partnership; local property owners, developers, real estate professionals; and small businesses
raithers & nesources	Southbridge Redevelopment Authority; Worcester Chamber of Commerce,; Southbridge Business Partnership; local property owners, developers, real estate professionals; and small businesses Potential Funding Sources: ARPA
raithers & nesources	Southbridge Redevelopment Authority; Worcester Chamber of Commerce,; Southbridge Business Partnership; local property owners, developers, real estate professionals; and small businesses Potential Funding Sources: ARPA EDA funding for economic development and rebuilding
raithers & nesources	Southbridge Redevelopment Authority; Worcester Chamber of Commerce,; Southbridge Business Partnership; local property owners, developers, real estate professionals; and small businesses Potential Funding Sources: ARPA EDA funding for economic development and rebuilding Community Development Block Grant (CBDG)

Diagnostic

The Town has found it challenging to attract a more and a diverse mix of businesses into downtown. The Town struggled to attract commercial tenants to downtown prior to COVID, but the new economic pressure of COVID renders it nearly impossible to secure tenant agreements for commercial space.

The diagnostic phase revealed an estimated 24 vacant storefronts in the downtown study area, and this number has increased due to COVID-19. There is a variety of reasons for vacant storefronts including substandard physical spaces, many owners currently do not widely or effectively advertise their vacant space and that small business owners are unable to find space that is up to code, which prevents them from establishing a presence downtown.

The number of vacancies combined with the overall goal of increasing vibrancy and foot traffic in downtown Southbridge point to the importance of increasing the number of 'activating' small businesses such as coffee shops, retail, restaurants, and art/creative economy ventures. These themes came through during stakeholder interviews, with the need to do more to add businesses to downtown that provide active ground floor uses. Relatedly, there is a need for property owners to advertise, both on-site and online, that space is available for lease or sale to support and encourage more commercial activity in downtown area.

Action Item

The overall goal of this project recommendation is to fill vacant commercial space in downtown with active ground floor uses. To the extent possible, these efforts will attempt to include minority and women-owned small businesses to help downtown business ownership better reflect the actual demographics of Southbridge. For advice on how to build this strategy see the attached Best Practice data sheet.

This project recommendation has a two-pronged approach:

- Create a marketing and promotion strategy to attract businesses downtown and encourage their utilization of existing incentive programs
- Develop a marketing campaign to promote downtown Southbridge as a place to do business
- Engage commercial property owners to document and advertise vacancies

Process

- Identify a lead entity to be responsible for property owner outreach. See the attached Best Practice sheet for advice on how to engage the community and downtown businesses in developing a Downtown initiative program with the intent of marketing downtown to businesses and invertors.
- Develop a district profile summarizing the downtown Southbridge market data. The district profile is a commonly used marketing and communications tool that tells the story of the district. Many successful commercial districts around the country have used such tools to attract and retain businesses, customers, and also real estate and capital investments. In addition, the district profile can build a common understanding of the current conditions and help grow community buy-in. Often the district profile is made available to the public in digital or print formats. For Southbridge, this district profile will be strengthened once projects currently under construction or in the planning phase come online, such as the mixed-use Youghal project at the corner of Main and central Streets, housing on Foster Street, and the Mello Tiger Cannabis retail project.
- Produce marketing materials to attract tenants to fill vacant commercial space. The
 marketing materials must:
 - Provide information about incentive programs and other resources for businesses to locate in downtown Southbridge in an accessible and visually appealing format, for both electronic and hard copy distribution
 - Identify a single point of contact for questions and additional information about incentive programs (Town of Southbridge Economic Development)



Location

Reading, MA

https://www.readingma.gov/public-services/economic-development/pages/reimagine-reading-survey and https://www.mass.gov/doc/admin-capacity-best-practice-sheets-compendium/download (pg. 34)

About

Reimagine Reading is a privately lead, Town & state supported initiative to create a public/private partnership and non-profit organization that will provide supplemental services and continued investment for a more vibrant Town.

Collectively, the initiative has identified the following key initiatives:

- Placemaking
- Business support and development
- Marketing and branding
- Downtown Access
- Advocacy
- COVID-19 business support and economic development recovery



Planning Process/Timeline

2018 Town Economic Development Forum - Public identified the need for multi-stakeholder group to be a champion for downtown.

Spring 2019 - Town applied for and received a technical assistance grant, from the Massachusetts Downtown Initiative Program through the Department of Housing and Community Development, to hire a consultant to provide technical assistance in the exploration of a downtown district management organization to provide supplemental services to the community.

Summer/Fall 2019- Town provided staff support to build community capacity, strengthen partnerships, and lead a robust and on-going public engagement process.

September 10, 2019- Presentation on District Management Types - On September 10, 2019, technical consultant, Ann Burke, presented to the working group to talk about different kinds of organization models and considerations for each type: Finding the Right Fit-Structures of Downtown Organizations

September 18, 2019- Ice Cream Social Event - On September 18th, the Town sponsored a Pizza and Ice Cream Social at the Pleasant Street Center. Over 100 people came including many new faces. We were also excited to have some really great participation from families and kids in the community. Relmagine Reading Ice Cream Social Presentation.

September 9-October 15, 2019 - Community Survey- The Town provided staff support, marketing, and coordination for a community wide-survey. The purpose of this survey was to gather information from the public to help share the future of this future organization and its initiatives and was one of many public engagement tools used to gather information. Thank you to business partners, organization members, and residents for spreading the word!
We had 1,538 respondents!

November 11, 2019- Community Survey Results Relmagine Reading Downtown Initiative Survey Results 2019

Winter 2019- Working group meetings, peer-to-peer conversations, analysis of public engagement data to develop a vision and preliminary action plan for a future organization.

Spring/Summer 2020- Town applied for and received a second technical assistance grant, from the Massachusetts Downtown Initiative Program through the Department of Housing and Community Development to provide technical assistance in support of ongoing public/private partnership and development of a 501(c)3 non-profit organization.

Update to Select Board by Town staff at the September 15, 2020 Select Board meeting. See document for more detailed background information HERE.

Fall/Winter 2020- Town continues to provide grant supported technical assistance to support ongoing public/private partnership and development of a business improvement district organization.

Spring-Fall 2021- A private group of property owners, business owners, and residents are actively working together with a grant supported technical consultant to continue to develop a business improvement district organization.

Placemaking including signage and façade improvement program

Category	Private Realm
Location	Downtown Southbridge
Origin	Town staff, stakeholders
Budget	Low Budget (<\$50,000) – to start, higher budget for installations and as loans/grants for storefront and sign improvements
Timeframe	Short-Term (<5 years) -
Risk	Medium Risk
Key Performance Indicators	number of landlords or businesses taking part in the program, property valuation increasing, decrease in vacant storefronts
Partners & Resources	Town staff, Southbridge Business Partnership, property owners, business owners, state and local funding (façade improvement program, other local funding, Chamber of Commerce funding)



Building owned by Vocero Hispano Newspaper, Photo:BSC Group

Financial impact to businesses during COVID (insert specifics from survey) means there is less reserve funds to make improvements.

Diagnostic

Downtown Southbridge has a unique character that emanates from many of the buildings and architecture that has remained from its past. Many residents and visitors note that Southbridge has a charming character. This historic architecture already provides a sense of placemaking. This character and charm needs to be enhanced, consistently reinforced, and blended with other activities for a consistent theme.

Furthermore, this downtown character needs to be integrated into a marketing campaign for downtown. Some stakeholders stated that the character of downtown is one unique aspect of town that is being used to try to attract investors, businesses, and developers.

Action Item

Engage the Community – Make sure town residents are involved with identifying the vision, goals, and priorities for downtown placemaking that builds upon Southbridge's unique physical and social attributes.

Make sure Placemaking in integrated into the Town's branding and marketing campaign – Create a consistent visual identity for Southbridge and the town center to be seen as a destination due to its collective attributes.

Enhance the Façade and Signage Improvement Program - The town already has a façade improvement program, which has assisted with façade, signage, awning, and other storefront improvements. The town should update, adopt, and use its Downtown Design Guidelines to guide these storefront improvements as another means of reinforcing placemaking of downtown Southbridge.

Integrate Placemaking into Redevelopment Projects – find ways to integrate placemaking into the local review process for new development and redevelopment projects.

Public Realm Placemaking - Take actions to reinforce the Towns placemaking theme in the public realm, such as:

- Gateway treatments Identify key routes that provide gateways into the downtown, and utilize these gateway locations to identify the town center, welcome visitors, and create an arrival moment
- Banners Increase the frequency and visibility of banners using pedestrian-scale street lighting where possible to create a consistent sense of place in the town center
- "Asphalt Art" In coordination with existing pedestrian enhancements, use tactical urbanism (low cost) treatments to experiment with placemaking and street design changes to create a town center destination that prioritizes people.

Other considerations – Highlight local architecture and culture; Showcase historical events; emphasize local assets (e.g., Town Common,)

Recommended Stages and Features of a Façade Improvement Plan Source: Osunbunmi O., Gula M., Elahmr N. (2016) Façade Improvement Programs: A Report to Centreville, OH. Wright State University.

Top 10 Important Features of a Facade Improvement Program

Stage 1: Plan

- 1. Develop a budget for the program
- 2. Dispense funds recommended by reimbursement
- 3. Pilot in a target area
- 4. Easy understandable application & include measurement indicators
- 5. Free design assistance with application

Stage 2: Advertise & Implement

- Marketing e.g. flyers, chamber of commerce, grocery store, utility bill
- 7. Implementation Plan:

Stage 3: Evaluate & Decide Future

- Gather data each month before and after implementation:
 Multiple-time series evaluation design; alternate Time series evaluation design
- 9. Analyze possible long-term impact e.g. every 4-5 years
- 10. Decide on future of the program

Process

Placemaking Committee

- To help guide all the following actions, the Town should establish a "Placemaking Committee" to provide input on all placemaking actions
- This Committee should include members who understand the Town's history, architecture, urban design as well as representatives from Southbridge's diverse population to ensure placemaking relates to all.
- The Committee should identify the core elements of Southbridge that contribute to its unique character and should be highlighted and enhanced in placemaking actions and policies

- Placemaking/Branding Campaign

 Engage businesses/residents to utilize placemaking imagery and assets in marketing, signage and events that will guide Southbridge's placemaking theme and actions Engage local artists or a branding agency to create a logo, color palette and font, as well as standards for application. Consider leveraging local art students!

 Identify existing assets and opportunities to apply brand, such a part of the public art actions, murals, streetscape improvements, parks, etc.

Design Guidelines

- Update the previously prepared Design Guidelines to emphasize important placemaking elements identified by the Committee
- The updated Design guidelines should be adopted by the Redevelopment Authority and used to guide downtown redevelopment projects
- The Design Guidelines should be adopted by the Planning Board and incorporated in the Site Plan Review process as a guide for redevelopment projects in the downtown

Gateway Treatments

- / Ireatments
 Identify core town center boundary to designate "entry points' into downtown Hire a designer or landscape architect to develop a gateway concept to be replicated at key gateways, or work with local design schools
- schools
 Engage community to select a preferred
 concept
 If needed, obtain public easements or
 permission from property owners to place
 gateway treatments on private property.
 Obtain funding.
 Install the gateway elements, program the
 space, and advertise it widely.
 Seek feedback once area is open to public.
 Evaluate and adapt as needed.

Banners & Murals

- & Murals
 Incorporate placemaking themes and graphics
 into downtown banners to be placed on street
 light poles and other street elements
 Identify funding source(s) to manufacture,
 install and maintain banners
 When producing murals for downtown, use
 placemaking goals and themes as part of the
 criteria for designing and selecting
 appropriate murals. appropriate murals

"Asphalt Art"

- Engage community to identify locations for street art Work with local artists and designers to develop design concepts consistent with
- placemaking
 Complete review and approval from local
 public works and other agencies as required
 Create a community event out of installation
 day where residents can come paint



Storefront Improvement Programs



Location

Various - Springfield, MA; Cambridge, MA; Central Point, OR

Corridor Storefront Improvement Program, Springfield, MA

Program details available at: https://www.developspringfield.com/cs ip-developspringfield.html

Storefront Improvement Program, Cambridge, MA

Program details available at: https://www.cambridgema.gov/CDD/ec ondev/smallbusinessassistance/smallbu sinessprograms/storefront

Façade Improvement Programs, Central Point, OR

Program details available at: https://www.centralpointoregon.gov/u rbanrenewal/page/facadeimprovement-programs

The CSIP is a program designed to provide grants of up to \$10,000 to eligible property owners and business tenants for improvements to ground-floor storefronts located on Main and State Streets with the goal of improving the physical appearance of buildings along these two important corridors. Funds can be used to make exterior improvements such as:

- Lighting, Windows and Doors, Signage and Awnings, Repair/Restoration of Finishes or Achitectural Detailing
- Masonry Repair Removal (or conversion) of Solid Roll-Down Grates
- Landscaping

Cambridge property owners or tenants can access financial resources to renovate or restore commercial building exterior facades through the Storefront Improvement Program. The Program improves the physical appearance of independent businesses and enhances Cambridge's commercial districts.

This program provides:

- 90% matching grant up to \$20,000 for ADA improvements to entrance, including ramps, lifts, doors hardware and automatic openers, accessible parking, and signage.
- 50% matching grant up to \$15,000 for other façade improvements, including better windows, paneling, architectural details and restoration of historic
- 50% matching grant up to \$2,500 for signage, lighting and awning improvements

As part of The Downtown & East Pine Street Corridor Revitalization Plan, an urban renewal plan for the City of Central Point, the City approved two storefront improvement programs designed to encourage the rehabilitation/restoration of commercial building facades within the Downtown Area:

- The Building Façade Loan Program (Loan Program) is a downtown revitalization incentive program designed to encourage the rehabilitation/restoration of building facades. Through the Loan Program loans between \$1,000 and \$10,000 are available tow owners of commercial buildings within the Loan Programs boundaries. The loan is a zero percent loan with a five-year amortization period.
- The Historic Building Façade Grant Program (Grant Program) is a downtown revitalization incentive program designed to encourage the rehabilitation/restoration of commercial historic building facades within the Downtown Area (see map). The objective of the Historic Building Façade Grant Program is to encourage the preservation of commercial historic buildings, particularly along East Pine Street, that represent the history of the City of Central Point. The Grant Program provides \$1,000 to \$10,000 in grants for qualifying historic rehabilitation/restoration work. Qualifying work is similar to the Building Façade Loan Program, but limited to activities that focus on the historic rehabilitation/renovation of the storefront.

Placemaking Plan



Location

Brockton, MA and Ashland, MA

PROJECT INSPIRATION

Prova, Brockton, MA



Brockton was seeking to activate a vacant parcel in its Downtown core to prove the viability of the Downtown as a commercial destination, particularly on nights and weekends, and create a cohesive community space in the heart of Downtown. Prova brought together public art, community, local commerce and more in a temporary activation of a lot slated for development.

BUDGET: \$110,000 for movie equipment

IMPLEMENTATION: 3-6 weeks

TIMELINE: Seasonal but can be extended to winter
MATERIALS: tables, chairs, stage, retail sheds, lighting,

umbrellas, paint, sound system, plantings.

MAINTENANCE: staffing and upkeep of space

Corner Spot, Ashland, MA



Ashland was seeking to create a community hub in the Downtown that would be a passive place for residents to gather, grab a meal or enjoy take out from town while also hosting small recurring events. The retail space serves as a way for area businesses to test the viability of a brick & mortar retail presence while also serving as an activator for the space itself.

BUDGET: \$65,000 for all components

IMPLEMENTATION: 8-12 weeks

TIMELINE: year round programming and passive use

MATERIALS: landscaping, swings, tables, chairs, shade sails,

shed fitted for retail use, audio equipment, games

MAINTENANCE: moderate- cleaning, landscaping, repairs, event

programming.

Address the need to fill the high level of vacant storefronts

Category



Private Realm / Economic Development

Iomax

Location

Southbridge Downtown

Origin

Planning Staff; Residents, LRRP Facilitators

Budget

Risk



Medium Budget (\$100,000) — Consultant resources; potential funding needed to carry out recommendations and subsidize innovative businesses or entrepreneurs

Timeframe



Medium Term (5-10 years) – Onboard consultant or expert to devise strategy will be short-term; implementing strategy(s) for business owners and the Town, as well as identifying funding needed will



Low Risk – Budget losses; participation of legacy businesses and hard to reach business populations; funding elimination; staffing; lack of overall participation

Key Performance Indicators

The number of vacant storefronts will decrease over time

Partners & Resources

Planning Department, Property Owners, Developers, merchants, entrepreneurs, Southbridge Business Partnership



Vacant Premium Storefront in the Southbridge Study Area

Diagnostic

The Town of Southbridge has an unusually high number of vacancies in the study area, even before accounting for COVID impacts and changes in industry and demographics. The area is a challenging geographic location for small business to succeed and thrive. The effects of COVID have only accelerated this problem.



Multiple vacant storefronts with residential above

Action Item

Goal 1: Hire an expert or consultant

 Educate Town staff and Property Owners on ways to attract and incubate small businesses

Goal 2: Conduct market analysis

- Identify gaps in market
- Recommend strategies to market or subsidize struggling businesses



Multiple vacant storefronts across from Municipal Parking Lot

Process

Goal 1: Hire a consultant

- 1. Issue an RFQ and review qualifications prior to selecting a qualified consultant or expert.
- Draft contract
- Review qualifications
- Hire consultant
- 2. Market evaluation and analysis
- Identify gaps in market
- Explain findings
- Recommend strategies to improve market

Goal 2: Procure Funding and Implementation

- Apply for grants and other funding
- Work with business community
- Create application process for small business subsidies
- Implement other recommendations from market research



Vacant lot presents multiple opportunities at Municipal Parking Lot

Additional detail on this recommendation can be found in the Appendix

Branding and Coordinated Marketing of the Downtown Business District

Category



Private Realm, Economic Development

Location

Southbridge Downtown

Origin

Planning Staff

Budget



Medium - (\$100,000) Costs to engage a marketing and branding advisor and project coordinator. Further costs depend on scope of marketing / branding strategies, number of initiatives, complexities, participating businesses. Funding may be derived from grants that support small business and economic development - growing new businesses / business awareness.

Timeframe



Short Term (<5 years) – Initial engagement of a consultant or expert to devise strategy will be short-term; implementing the strategy and identifying the funding needed will be ongoing.

Risk



Medium Risk - Requires buy in from the Town, and participating businesses and dedicated funding for the program and staff to coordinate the program..

Key Performance Indicators

Increased sales and/or economic activity downtown; Percentage of occupied storefronts; and the stability of the number of businesses that were open in 2019-2021 that will still open 5-10 years later.

Partners & Resources

Planning Department, Downtown businesses, Southbridge Business Partnership, regional organizations (Chamber)



Example of Coordinated Signage in Southbridge

Diagnostic

The Town of Southbridge has a Southbridge Business Partnerships group that meets monthly. However, the Downtown Southbridge LRRP study area remains a challenge. It is situated far from major highways and seems to serve as a passthrough for traffic that doesn't seem to stop. There is a high vacancy rate of street level storefronts as a result of many factors, including absentee owners, along with the loss of business and traffic due to the Covid-19 pandemic.

The Town would like some assistance on how it can help bring these businesses together to help the ones who are struggling and attract new businesses willing to locate in Southbridge.

There seems to be a focus on what the town was before with a large employer that left the area many years ago – focus should be on what the positives are now and what the future holds for the area.

It is important to note that there are positive things happening in the Downtown area with the opening of a new recreational marijuana store, the rehab of building that will have restaurant and residential and new residential development in the area. It has a historic feel with the architecture of the downtown buildings

These positives can be used to promote a "new Downtown" brand and marketing campaign that will support and raise awareness of the current businesses and, secondly, to foster and promote economic development in the Downtown.



Example of uncoordinated signage and marketing

Action Item

- Create branding based on identity or theme
 of district that will create recognition of the
 Downtown area with the intent of
 increasing sales and traffic.
- 2. Build off branding from other parts of Town to add distinction to the area, yet identify it with the rest of the town
- Develop marketing opportunities to raise awareness of the Downtown – events, arts, promotions
- Encourage recruitment and growth of new businesses and promotion of current businesses



Example of uncoordinated signage and marketing

Process

Branding Effort

Select a team to work on this effort – it should be comprised of key stakeholders from the town - officials, cultural representatives, and business owners. This team should work to determine the "New Look" of the area and consider the various uses of the brand. Simultaneously you should identify funding for this project and create signage or other physical assets for the district.

Hire graphic designer – consider using a local designer that knows the area and can reflect that in the design that this is a special and unique area of Southbridge. The designer should also be able to apply this new look to your marketing efforts – for various applications and for use by the area businesses. Consider a tagline that fits your community and works to identify it.

To get stakeholder and community buy in hold a community meeting to review the branding and marketing strategy.

Brand Uses & Recognition – Once the brand is established it can be used in various applications – this should be seen as a starting point for other projects that were proposed through the LRRP initiative – i.e., wayfinding signage, events, economic development, and communications.

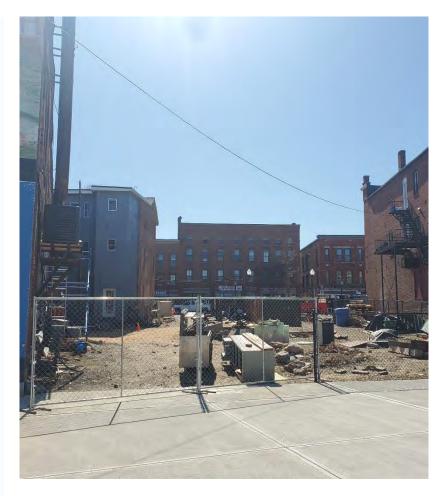
Marketing Effort

Develop a Marketing and Communications Plan — Consider if this is done in-house or if there is a need to hire a communications professional. This will affect your budget structure. Consider utilizing an intern from a local college or funding this position to both market the district businesses and to help market the district in support of and to foster economic development.

This plan will be the roadmap to enhance the Downtown brand year-round and should incorporate how you communicate that "Downtown Southbridge is a great place to be and visit" – i.e., develop hashtags for social media, what sources can be utilized for messaging for businesses, to the public and the surrounding communities.

Consider linking to and expanding the Town website with a tab or section that features "Visit Southbridge" with a calendar of events, listings of businesses and restaurants. Also consider revamping the Doing Business section to encourage new business development and attraction.

This plan include events marketing for the area – focusing on events that should encourage patrons to explore the Downtown area.



Vacant lot presents multiple opportunities at Municipal Parking Lot



Example of cohesive signage in Southbridge

Process Continued

Build on and complement what has been done in the area – New and current businesses, culture and amenities of the area should be highlighted in marketing and social media efforts. Design guidelines are in place that can help to formulate your marketing and branding efforts as they relate to signage and storefront.

Concentrate on the Excitement in the area – Focus should be on new and existing businesses, not what's wrong with the area, but what's great and unique about it and its businesses, history and culture. The revitalization taking place is a start-off point for what's new, what's here and what's to come in Southbridge. Focus on drawing people Downtown from the other areas in the town and region. Activities and restaurants will serve as draws for Downtown.

Provide training and support for local businesses for marketing their businesses individually and in a shared format – social media, geo-targeted advertising, sales and events marketing programs will serve to enhance promotion of the district.

Enabling businesses with the ability to selfpromote and better market their businesses will serve to draw more traffic to the area. Business workshops are an great tool not only for the businesses, but a way to form a sense of cohesiveness within the business community.

It is important that your Downtown storefronts look their best – you may consider asking downtown businesses or a "sub-committee" of the SBA to do a self-assessment of the stores, then have that group share their findings and look for common actions and improvement that will help all. Items to assess include storefronts, window displays, signage, visibility, inside appearance/comfort/attractiveness, etc.

Remember that marketing is not just advertising – it's how you present your Downtown and its businesses to customers, visitors and potential companies looking to open in Southbridge..

storefronts look cohesive and attractive













Consult the Compendiums on business assessments by Goman+York and others on events and marketing efforts for Downtown Districts – Pledge to Support Local; Coordinated Social Media Marketing and more can be used for examples. Below find examples of brand logos for Downtowns

Additional detail on this recommendation can be found in the Appendix

Foster Growth and Resources for Spanish-Speaking Businesses and Residents

Category	Economic Development
Location	Southbridge Downtown
Origin	Planning Staff; Stakeholder Interviews
Budget	Medium - (\$100,000) depending on the scope of the activities and outreach required. Language access services may be an expense
Timeframe	Medium Timeframe - Onboarding of a consultant or expert to devise strategy will be short-term; implementing strategy and identifying funding needed will require more time
Risk	Medium Risk - requires political will, dedicated funding, and participating businesses owners and residents
Key Performance Indicators	Increased participation by black/brown/latinx community members and business owners by way of number of businesses in the community or number of members serving on local boards
Partners & Resources	Planning Department, businesses, business partnership, houses of worship, local newspaper
Diagnostic	The Town of Southbridge is seeking to increase resources for Spanish-speaking business owners and residents as part of its rapid recovery planning efforts. There are a considerable number of alternatives for advancing these efforts. Some significant things to determine include the cultivation of a racial equity lens to ensure the deployment of culturally congruent economic development strategies and practices; the nature of services and resources to offer; the clusters of entrepreneurs and small businesses to focus on; the number stages of the business development lifecycle of interest; if the municipalities' efforts should prioritize working directly with small businesses or convening and coordinating the network of business support organizations serving entrepreneurs (e.g., whether or not to offer business programs and resources in house our invest in their cultivation among select community partners).
	DANISH & AMERICAN FOOD. ICE COLD B
	OS VECINOS ECONOMINAMENTA SPANICES COMIDA

Source: BSC Group

Cultural Competence Continuum

		n l		

Cultural Destructiveness	Cultural Incapacity	Cultural Blindness	Cultural Pre-Competence	Cultural Competence	Cultural Proficiency
Disregards cross-cultural awareness, knowledge, behavior, skills in staffing pattern, service provision, program design, etc.	Does not accept multiple perspectives as valid; there is one "right" or "best " way	Disregards diverse religious/cultural practices when scheduling hours of operation	Exhibits emerging visual representation of all ethnicities, genders, etc, as active and valued community members	Provides regular staff training in cultural competence and its relationships to service provision	Provides services in languages that meet the needs of populations served (consumers)
Creates advertising that perpetuates stereotypes (e.g. women as depressed, substance abusers as black males)	Speaks on behalf of vs. supporting special populations in efforts to speak for themselves	Plans and implements special events assuming a shared value (e.g. Christmas Party)	Recognizes that it is NOT connected with neighborhoods and coalitions that promote various groups, seeks to correct situation	Ensure that all written and visual material is respectful, in multiple languages an Braille, with emphasis on the value of difference	Takes proactive stance on the advancement of cultural competence within the community
Creates criteria that exclude or create artificial barriers, or job requirements that have nothing to do with performance ability	Sees diversity as meeting quotas	Does not recognize or compensate for specialized skills or actively objects to compensation for specialized skills	Solicits diversity feedback from all staff at all levels on a regular basis	Implements culturally competent plans and evaluates periodically for effectiveness	Provides modeling and training to other organizations on diversity
Refuses to select and recruit bilingual staff	Downplays need to hire translators and translate paperwork	Requires all sessions to be conducted in English regardless of individual or families needs	Recognizes organization's high dropout rate of minority participants and seeks change.	Has balanced bilingual staff/customer ratio and provides support to staff for "other" languages and skills	Provides mentoring program and paid stipends
Provides paperwork in English only	Puts down family values	Is rigid about following paperwork requirements	Recognizes that paperwork and bureaucracy are driving individuals and families away	Establishes committee to revise paperwork, program literature, etc., for bilingual customers	Streamlines paperwork and ensures that all material is in multiple languages
Does not recognize the importance of family participation	Uses primarily Anglo- oriented methods of treatment too rigid to consider new methods for different cultures	Ignores the strength of the family unit	Recognizes the lack of training for staff and is willing t implement a culturally appropriate training program	Screens for culturally offensive material and deletes from written and spoken communication	Offers phone line services in multiple languages
Refuses to be sensitive to different cultures		Lacks training to provide special services to minorities	Recognizes staff have cultural limitations and encourages training	Takes responsibility for bringing family into the training circle	Values families and their cultures and commits to educating family on issues critical to treatment success
				Includes cultural issues in training plan	Displays sensitivity to cultural issues and provides education to their organizations

Adapted by Sharon Glover with permission from Building Bridges: Tools for Developing an Organization's Cultural Competence; Developed by La Frontera, Inc; Funded by US Office of Minority Health

Process

			RACIST MULTICULTU		
MONOCULTUR.		CULTURAL	ANTI-RACIST	ANTI-RACIST MULT	
Racial and Cultural Differen			d Cultural Differences		al Differences seen as Assets
1. EXCLUSIVE A SEGREGATED INSTITUTION	2. PASSIVE A 'CLUB' INSTITUTION	3. <u>SYMBOLIC CHANGE</u> A MULTICULTURAL INSTITUTION	4. IDENITIY CHANGE AN ANTI-RACIST INSTITUTION	5. <u>STRUCTURAL</u> <u>CHANGE</u> A TRANSFORMING INSTITUTION	6. FULLY INCLUSIVE A TRANSFORMED INSTITUTION IN A TRANSFORMED SOCIETY
Intentionally and publicly excludes or segregates African Americans, Latinos, and Asian Americans Intentionally and publicly enforces the racist status quo throughout institution Institutionalization of racism includes formal policies and practices, teachings, and decision making on all levels Usually has similar intentional policies and practices toward other socially oppressed groups such as women, disables, elderly and children, lesbian and gays, Third World citizens, etc.	Tolerant of a limited number of People of Color with "proper" perspective and credentials May still secretly limit or exclude People of Color in contradiction to public policies Continues to intentionally maintain white power and privilege through its formal policies and practices, teachings, and decision-making on all levels of institutional life Often declares "we don't have a problem."	Makes official policy pronouncements regarding multicultural diversity Sees itself as "non-racist" institution with open doors to People of Color Carries out intentional inclusive efforts, recruiting "someone of color" on committees or office staff Expanding view of diversity includes other socially oppressed groups such as women, disabled, elderly and children, lesbian and gays, third World citizens, etc. BUT "Not those who make waves" Little or no contextual change in culture, policies, and decision-making Is still relatively unaware of continuing patterns, privilege, patemalism and control.	Growing understanding of racism as barrier to effective diversity Develops analysis of systemic racism Sponsors a program of anti-racism training New consciousness of institutionalizes white power and privilege Develops intentional identity as an "anti-racist institution" Begins to develop accountability to racially oppressed communities Increasing commitment to dismantle racism and eliminate inherent white advantage BUT Institutional structures and culture that maintain white power and privilege still intact and relatively institutional propersions.	Commits to process of intentional institutional restructuring, based upon anti-racist analysis and identity Audits and restructures all aspects of institutional life to ensure full participation of People of Color, including their world-view, culture and lifestyles Implements structures, policies and practices with inclusive decision-making and other forms of power sharing on all levels of the institution's life and work Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities Anti-racist multicultural diversity becomes an institutionalized asset Redefines and rebuilds all relationships and activities in society, based on anti-	Future vision of an institution and wider community that has overcome systemic racism Institution's life reflects full participation and shared power with diverse racial, cultural, and economic groups in determining its mission, structure, constituency, policies and practices Full participation in decisions that shape the institution, and inclusion of diverse cultures, lifestyles, and interests A sense of restored community and mutual caring Allies with others in combating all forms of social oppressing

Control. untouched a racist commitments

Used with permission of Crossroads Ministry, Adapted from original concept by Baily Jackson and Rita Hardiman & further developed by Andrea Avazian & Ronice Branding.

Considerations

Culturally Congruent Economic Development: To kick things off, we cannot stress enough how important is for your community to look inwardly as a fundamental transformational aspect of this work. Traditionally, government, planning, and economic development agencies adhered to a universal playbook for community, business, and economic development normalized under a Euro-American worldview—emphasizing top-down approaches. Universalism and individualism are among the core premises of this construct. However, in our increasingly multiethnic, pluralistic, and linguistically diverse society, traditionalapproaches are increasingly yielding suboptimal results. The emerging playbook calls for bottom-up approaches, requiring organizations and systems to adopt cultural relativism as the new paradigm to ensure success in our complex communities and economies at all levels (e.g., local, regional, national, and global). Given the unique aspects of working with the heterogenous Latinx community, your community's playbook will need to create space for interpretation services, language translation on printed and digital materials, navigating the dynamics afforded by immigration status, and a recognition of the cultural importance of maintaining "respect," making time for building authentic "relationships"—NOT rapport—and honoring the sacredness of "famalisimo" as core operating principles and values. As with other cultural communities, the Latinx community will need to genuinely "see themselves" within all levels of the organization or system as well as within community facing roles to truly embrace culturally-specific efforts for improvement—which is a metaphorical marathon, rather than a sprint.

To these ends, we have used Undoing Racism® Community Organizing Workshops facilitated by the People's Institute for Survival and Beyond (PISAB) as a starting point for our transformational work within government and with cross-sector, cross-community partners. PISAB is an international collective of 100+ anti-racist, multicultural community organizers and educators dedicated to building an effective movement for social transformation. Since 1980, their learning methods have allowed them to consistently outperform their peers. This claim is evidenced by over 30 peer-reviewed scholarly journals and texts on their work, which has informed the development of community-based participatory research as a field of practice for working with diverse communities. Undoing Racism® is their signature workshop, leveraging dialogue, reflection, role-playing, strategic planning and presentations. It is an intensive process that challenges participants to analyze the structures of power and privilege that hinder equitable growth and social inclusion, preparing them to be effective organizers for justice. They average 30 to 35 workshops per month, with each lasting two-and-a-half to three eight-hour days.

- Services and Resources Offered: This alternative refers to the offerings mix such as the decision to provide business development workshops
 and classes, technical assistance (e.g., helping with completing financial assistance applications or writing business plans) and resource
 navigation (e.g., serving as a concierge and making referrals to the appropriate sequence of support services), low-to-no-cost office space (e.g.,
 incubators, co-working) and business centers with special programs (e.g., accelerators), coaching and mentoring services, business pitch
 competitions, procurement-readiness certification programs and vendor pipeline development strategies (e.g., one-on-one, group, and cohort
 programs focused on helping businesses obtain minority and women-owned business, HUD section 3, disadvantaged business enterprise and
 other business certifications; also, cultivating prime and subcontractors).
- Business Clusters Served: This aspect of business support decision-making refers to choosing what kinds entrepreneurs and small businesses to support. Our national network partner SourceLink has prepared a short video that outlines four fundamental clusters of businesses regardless of industry or sector. Each cluster generally requires different kinds of support tailored to their distinct contexts. The innovation-led cluster refers to tech, high tech, and science-based businesses. The microenterprise cluster encompasses small businesses with 10 or fewer employees, often operating in the "gig" economy. This includes freelance photographers, event planners and promoters, consultants, pursuing their craft for personal income full-time or as side jobs. The main street cluster, or "mainstreeters," corresponds to doctor's offices, law firms, restaurants, retail shops and the like that bring vibrancy to commercial corridors and neighborhoods, but whose firms are unlikely to grow too much. Lastly, the second stage cluster encompasses established firms with 10 to 100 employees capable of achieving high-levels of growth and scale.
- Business Development Lifecycle: Like living organisms, businesses go through a lifecycle. In our public sector work, we have adopted the terms "start up," "stay up," "scale up," and "split up" to broadly characterize the phases of the entire lifecycle. Within each phase, one would find the traditional stages of business development commonly taught in a Business 101 course. This includes the "seed," "concept" or "idea" stage interchangeably; the "launch" or "start-up" stage; the "growth," "shakeout," and "maturity" stages; the "expansion" stage; and the "decline," "succession," and "exit" stages within the phases, respectively. Businesses wrestle with distinct challenges, pursue different milestones, and require different kinds of support along this continuum. It would serve municipalities well to be cognizant of how support is configured to assist entrepreneurs and small businesses along this journey. There is no effective one-size-fits-all approach to small business support.
- Entrepreneurial Ecosystem Building: In addition to working directly with small businesses to build their capacity, municipalities can
 alternatively assume the role of convener and connector across local and regional resource networks of entrepreneur or business support
 organizations—interchangeably called ESOs and BSOs. ESOs tend to include government, nonprofits (e.g., public charities, foundations,
 community development financial institutions, economic development agencies, chambers of commerce, etc.), and academic institutions that
 provide any of the kinds of offerings described above. In some special cases—like coworking facilities, incubators, and accelerators—ESOs can
 be for-profit enterprises that offer their resources at low or otherwise moderate costs. But, ESOs do not include professional services providers
 like accountants, lawyers, insurance agents, commercial banks, or technology companies.
- The entire network of ESOs in a community are referred to as the small business ecosystem. Uncoordinated, these actors struggle to meet businesses where they are in culturally and contextually congruent ways capable of helping them achieve their goals and objectives. This reality has given rise to the emergence of entrepreneurial ecosystem building, which entails the active pursuit of inclusive coordination and systematic enhancement of the local or regional ESO network. Subsets of ESOs in these networks focus on or specialize in particular small business clusters and stages of the business development lifecycle. Ecosystem building is a team sport, and municipalities can play essential leadership roles in mapping, realigning, augmenting, and investing in the improvement of their small business ecosystems to scale business capacity building and growth activities through cooperation—realizing collective impact.

Planning

- Planning considerations can be as nominal or as expansive as the array of resources available and capacity building strategies pursued by a given community. To that end, here are a few high-level parameters by selected activity category:
 - Culturally Congruent Approaches:
 - O Hosting Undoing Racism® Workshops require a budget of up to \$20,000 per workshop for up to 35 participants. Antiracism/equity training provided by other vendors can range from \$10,000 to \$35,000 per training depending on the nature, modes of delivery, scope, and number of participants served. Additional costs may be incurred if the material procured is for the development of original or custom content that will become the property of the municipality or its community partners for ongoing deployment. Post-training, it will be imperative to invest in additional support resources and create space for ongoing dialogue and engagement within and across all levels of the organization, partner network, and the community. These commitments and steps can command a dedicated budget focused on achieving and maintaining systemic congruence between the municipality, employees, community partners, funders, and the community. Budgets vary greatly based on the scale and activity mix under this organizational culture change agenda.
 - Costs can include facilitator fees, travel, lodging, ground transportation, facility rentals, refreshments (e.g., meals and snacks), and training supplies.
- Workshops and Classes: The process should begin with an environmental scan of existing business support workshops and classes and an assessment of what is missing. Community engagement should allow the municipality or community partner to elicit the kinds of developmental content most desired and/or needed by the small business community. Once the need has been determined, program development and resource acquisition begin. If developed in-house, the provider will need to outline and develop materials and the sequence and modes of delivery. Subsequently, marketing and promotions is an essential means for driving enrollment with such considerations as requiring advanced registrations versus allowing walk-ins. Program administration follows along with options for personal office hours and post-program engagement (e.g., surveys, check-ins, and exit interviews) to determine the effectiveness of the program.
- •Technical Assistance (TA) and Resource Navigators:
 - Actions include the decision to allocate staff resources to small business support activities and initiating the hiring process once the requisite budget is obtained.
 - The process involves framing the specific small business need(s), determining the sources of funds, portfolio of work, and operating resources needed to ensure success. This includes resources for marketing the new available resources and services and whether community partnerships are needed for augmentation.
- Office Space and Business Centers: These costs can vary significantly based on a number of factors, but may include property acquisition (\$750,000 \$3,000,000), buildout of new or existing municipally-owned facilities (e.g., \$50,000 \$200,000), staffing (see above), and operating costs. Incubators, co-working facilities, and pop-up market opportunity programs can be configured to create a pipeline into permanent commercial corridors and storefronts for informal entrepreneurs and start-up companies. For more established businesses, expanding into larger or additional spaces may require solicitation, encouragement, site selection support, market development assistance, and financial incentives, especially to de-risk the investment. For the programmatic aspects of this section, refer to the prior sections above for details on budget ranges, possible costs and resource details, risks, timelines, and actions and process ideas.
- Specialized Events and Pipeline Programs:
 - · Refer to "Workshops and Classes" above for general resource options, key performance indicators, risks, actions, and processes.
 - In the case of organizational pipeline programs, specialized resources can require the services of quality consultants or software vendors that offer solutions designed to clarify and streamline organizational processes for increased efficiency and performance.
- Entrepreneurial Ecosystem Building:
 - Refer to the enclosed Best Practice Sheet titled, "Facilitating Inclusive Entrepreneurial Ecosystem Building and Enhancement" for actions and process steps associated with the development of www.Nexusi90.org (powered by SourceLink) in Greater Rochester (NY)/Finger Lakes Region.
 - Kauffman Foundation has convened an annual global ESHIP Summit to advance entrepreneurial ecosystem building as an emerging
 industry sector and occupational field of practice. They have culminated the summit community's collective learning and progress
 into a phenomenal and instructive playbook for ecosystem builders. In addition, in March 2021, the International Economic
 Development Council announced its new certification on entrepreneur-led economic development, which focused on
 entrepreneurial ecosystem building. For what it is worth, a case study on our work in Rochester is featured in the coursework.

Additional detail on this recommendation can be found in the Appendix

Adopting New Technology or Coaching for Business Owners to Increase Sales

Category	Revenue & Sales
Location	Southbridge Downtown
Origin	LRRP Best Practices
Budget	Projects can be customized to work within a range of budgets. The typical configuration per location cost is ~\$5,200
Timeframe	Medium Timeframe - Onboarding of a consultant or expert to devise strategy will be short-term; implementing strategy and identifying funding needed will require more time
Risk	Medium Risk – Need businesses to participate, there may be language barriers, internet service is critical for this technology implementation
Key Performance Indicators	# of businesses participating; change in businesses behavior following coaching (e.g., businesses with online ordering, businesses using email marketing, improvements in in-store displays); change in revenue for participating businesses
Partners & Resources	Southbridge Business Partnerships, business owners, consultants, internet providers,
Diagnostic	Many of the businesses in downtown Southbridge have no online presence whatsoever. There are few storefront retail establishments, but the Town wants to encourage more of these and to retain the ones that are there. It is difficult for these retailers to compete with online retailers, but if they have an online presence or an ability to use technology at the point of sale, they could be more successful at attracting and retaining customers. COVID-19 changed the way customers interact with businesses and many of these
	changes, such as more online interaction or curbside pickup provided conveniences that are likely to remain post-pandemic.
	During the pandemic, many communities launched business coaching programs to help time and cash-strapped businesses adapt and thrive in the new normal. Locally, downtown businesses identified marketing strategies, improvements to the private realm, and providing goods and services that would attract customers as among their chief challenges.
	Workshops and one-on-one technical assistance could assist business owners with: • Marketing and social media strategies
	 Inventory selection and management Technology strategies – e.g., online ordering, improved website experience Physical appearance and layout to increase foot traffic and sales Retail best practices Funding application technical assistance Understanding how business improvements help the whole downtown

Diagnostic

COVID-19 changed the way customers interact with businesses and many of these changes, such as more online interaction or curbside pickup provided conveniences that are likely to remain post-pandemic.

During the pandemic, many communities launched business coaching programs to help time and cash-strapped businesses adapt and thrive in the new normal. Locally, downtown businesses identified marketing strategies, improvements to the private realm, and providing goods and services that would attract customers as among their chief challenges.

Workshops and one-on-one technical assistance could assist business owners with:

- Marketing and social media strategies
- Inventory selection and management
- Technology strategies e.g., online ordering, improved website experience
- Physical appearance and layout to increase foot traffic and sales
- Retail best practices
- Funding application technical assistance
- Understanding how business improvements help the whole downtown

Action Item

Planning for this activity should include:

Assessing the coaching needs and preferred delivery format of downtown businesses. Successful coaching programs have been implemented in multiple communities with different foci – some on online presence and technology only, others on physical stores and inventory. Online workshop models might be more convenient and reach a broader audience while 1:1 technical assistance can assure implementation of recommendations. Many programs have utilized multiple simultaneous delivery methods for maximum effect. Business owners must be engaged in this assessment.

Obtaining funding for a coach. Funding for the program may be available through a grant, town funds, or businesses may contribute a modest amount to pay collectively for coaching services.

Promote the program to businesses. Coaching offered should take minimal time for businesses to participate in and should clearly communicate what they will get out of participating.

Following up with local business promotion. Promote downtown businesses and any new improvements via local media and social media.

Process

- 1. Work with Southbridge Business Partnerships to identify the coaching needs of the business community. The LRRP Business Survey can also serve as a source of information.
- Obtain funding through a grant or fees collected from participating businesses.
- 3. Determine baseline data point to collect (e.g., # of businesses with online marketplace, with email marketing) based on coaching to be provided.
- 4. Develop a coaching schedule, likely to include a combination of workshops and one-on-one assistance.
- 5. Collect post-coaching data to measure impact.
- Town, Southbridge Business Partnerships, and businesses collaborate to promote businesses and new improvements.



RANSFORMI through Entrepreneurship or



A series of key concepts relevant to a practical application of entrepreneurship introduced to students during each session of the Community Business Academy.

is introduced and defined for students.

EXERCISE + ACTIVITIES

DISCUSSION

Each chapter includes real life examples to reinforce the key concept from each class.

Students engage in an exercise (i.e. group activities around case studies, field trips,

business simulation games) that demonstrate the new concepts introduced during each class.

Students discuss and reflect on the exercise to grasp what occurred and its relationship to the

new concepts that they just learned.



Based on discussion, the Instructor facilitates a conversation that leads to an understanding of why their experiences during the exercise are important to their abilities to start and grow a business.



Students are given homework as a practical tool to apply the concepts learned in class directly to their business. Homework workbooks are provided to students at the end of each class. Homework can take anywhere from 3-5 hours per class.



HOMEWORK REVIEW

The beginning of each class is used to review the homework from the previous class. The Instructor answers questions generated by the homework. Participants submit homework at the end of class to be reviewed by the Instructor for further feedback and additional support.



ASSESSMENT

Various assessment tools are used throughout the Community Business Academy to measure the progress of participants' understanding of key business concepts and skills.

Photos: Rising Tide Capital



Best Practice

Building Business Capacity



REVENUES

Location

Jersey City, New Jersey

THE COMMUNITY BUSINESS ACADEMY

OUR PROGRAM

The Community Business Academy (CBA) consists of 12 consecutive, three hour-long sessions taking place once a week on weekday evenings or Saturday mornings for maximum convenience and accessibility to applicants with fulltime jobs or weekend obligations. Classes are taught twice per year from March through May and from September through December.

In order to be considered for the Community Business Academy, prospective students must attend an Information Session. This free orientation provides insight into the CBA program and allows our staff to evaluate each applicant and their business on an individual basis.

Every applicant accepted into the Community Business Academy receives a full tuition waiver worth \$3,000 thanks to the generosity of our funding partners. Our students' only financial responsibility is a nominal registration fee based on household income.

PROGRAM OVERVIEW







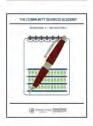




















We're Here to Help.

Learn What the City Buys





Qwally Platform

Self-Serve Tools for Government and Small Business



Small Business Portal

Visible program page with a streamlined user experience



Small Business Navigator

Tailored information to support individual businesses



Directory

Easily searchable directory of local small businesses



Applications

Easy to use online application experience for city programs and certifications

Photos: Qually

Best Practice

Human Centered Technology for **Small Business**



Location

Rochester, NY



A software system to engage with, monitor, and support individual business owners and the local economy of **Rochester, New York**









Organize & Support Capacity of the Downtown Business Community

Category	Administrative Capacity
Location	Downtown Southbridge
Origin	Stakeholder Engagement
Budget	\$ Low Budget (<\$50,000)
Timeframe	Short Term (<5 years) – Recruitment can start immediately
Risk	Medium Risk – long-term sustainability
Key Performance Indicators	# Businesses Participating; increased engagement among diverse resident groups
Partners & Resources	Southbridge Planning and Economic Development, Southbridge Business Partnerships, Property Owners, Business Owners, Funding: Massachusetts Downtown Initiative, MassDevelopment Real Estate Technical Assistance Program, or ARPA funds (if tied to implementing COVID recovery activities).
Diagnostic	Southbridge Business Partnerships was formerly Southbridge Downtown Partnerships nearly 20 years ago. Due to a change in business environment, the Partnership adapted to be more inclusive of all businesses located within Southbridge.
	Southbridge has continued to change during those years and there is a need to create a sub-group specifically to engage the Latinx populations. A subcommittee that had a specific task to create an event or heighten awareness for Hispanic Heritage Month, could help the Business Partnerships recruit more members to maximize inclusivity.
	During Stakeholder interviews, it became clear there are a number of prominent business owners in town and initiatives that exist, however, there lacks coordination amongst the various groups. The Business Partnerships is the largest organization by membership but is underrepresented when it comes to Latinx or other minority-owned businesses.

Action Items

Getting Started – Identify all businesses in Southbridge. Create a list of the business name, industry, name of owner, contact information, and how long they have been in operation.

Develop the Value Proposition/Communication – Learn from existing members of the Partnerships how best to communicate with Latinx business owners. Is there an existing association? Are there concerns about joining an association? Are there avenues to get before business owners such as at houses of worship or at festivals? Think about what the value that the Town or Business Partnerships brings to a business owner. There is a wealth of resources and intuitional knowledge a call or email away.

Stakeholder Engagement/ Leadership and Partnerships - Find the places where these business owners already go. Is there a popular print shop? Is there a coffee shop that everyone uses on their way into work? Is there a newspaper that everyone reads? Is there a specialty grocery store that serves these groups? Go to them, don't make them come to you.

Create a Community Outreach and Engagement Strategy – Once the Town or the Business Partnerships understands how to best communicate with its intended audience, create materials to send to business owners. These materials may need to be translated into several languages. Find two or three trusted leaders within the community to disseminate the information.

Resources for Startup and Sustainability – Recruit members for the subcommittee, appoint them, and set them up for success. Partner a new member with an established member. Check in to see if there are unexpected challenges or potential roadblocks that may impede success.

Process

On top of the actions listed above, the Town or Southbridge Business Partnerships could engage with a consultant in order to think differently.

The Partnerships need to identify a specific goal outcome, or event that can entice new members to join. Hispanic Heritage Month would be a good first task for the sub committee because it is broad and happens once a year giving many months to coordinate and organize.

In one of the stakeholder interviews, it was revealed that Southbridge used to have very elaborate Christmas decorations. This was an initiative by an individual who had access to professional and institutional décor and organized a parade. This is an initiative that could be recreated around another part of Town that holds meaning to Latinx or other underrepresented communities in Town.





SOUTHBRIDGE BUSINESS PARTNERSHIP CARPOOL CINEMA NIGHTS THANKS THE FOLLOWING 2021

CARPOOL CINEMA SPONSORS:

Hyde Tools | Dexter-Russell, Inc. | Big Bunny Market | Micknuck's Fresh Marketplace | SCHOTT | The Town of Southbridge

July 10 Carpool Cinema is also supported in part by a grant from the Southbridge Cultural Council, a local agency which is supported by the Massachusetts Cultural Council, a state agency.





Photos: Lowell's Business Recovery Task Force Initiatives

Best Practice

Establish a Business Recovery Task Force

REVENUES & SALES

Location

Lowell

LOWELL

During the pandemic, many Lowell businesses have struggled to survive, A clear need for support, technical assistance, and enhanced communication, in multiple languages and across various platforms, was identified by the Lowell Economic Development Office and its partners. It became evident that many business owners and managers did not have the resources or capacity to track and interpret the state and federal guidelines that were issued on a continual basis. In addition, the emergency stay at home order had a detrimental impact on their revenues. Several businesses shuttered their operations, reduced hours, or went into hibernation.

A diverse cross-collaborative effort was needed to facilitate a meaningful recovery during this crisis. The Lowell Business Recovery Task Force came together to spearhead local interventions, assisting businesses with accessing working capital and personal protective equipment for employees, improving business presence on social media, and assisting restaurants in pivoting their business models to take-out and curbside service. The goal of the task force was to ensure that all businesses in Lowell had the support that they needed to survive during this unprecedented period.

The Lowell Economic Development organized the Lowell Business Recovery Task Force to centralize resources for businesses and to provide assistance during the pandemic. The Task Force launched a web page to document their work and provide information on available assistance and programs. Language assistance in Spanish, Portuguese and Khmer was made available to ensure that the program was widely available to all City businesses.

To assist restaurants, the Task Force developed the Creative Restaurant Marketing during COVID-19 program. In partnership with Susu Wong of Tomo360, they hosted two free webinars on Creative Restaurant Marketing in 2020 that focused on online marketing and social media:

4/1/2020 - <u>Creative Restaurant Marketing -</u> Online Marketing

4/1/2020 - <u>Creative Restaurant Marketing - Social Media</u>

The City also created a marketing grant program available to Lowell's small, independently owned businesses that were most significantly impacted by the COVID-19 pandemic. Grant awards of up to \$2,000 were available to eligible businesses.







Specialized Technical Assistance Teams

If you are a Lowell-based retail business or restaurant, FREE help is available in these area:



MARKETING
Our consultants will aid you with content creation, videography, product applies food photography.



OPERATIONS
Get help building or adapting systems, documentation, or trainings to boost productivity and



FINANCE
Get specialized supp
with your accounting



E WELLNESS
lized support cocounting or g needs. From massages and ha styling, to nail or skin or let us provide you with self-care you deserve. I

If you have existing staff that fit any of these focus areas, we will provide compensation up to 40 hour Email Ani Vong. Program Coordinator at avong@commusam.org by May 1st or visit growyou/businessaticil.org for more info

Appendix

Southbridge, MA 60
Rapid Recovery Plan

southbridge

CivicMoxie FINAL

9/13/21

Project Title:

Institute public a public art initiative that connects underutilized spaces and businesses and contributes to the vibrancy of Downtown and community development.

Origin:

Planning Staff; Residents

Location/Census Tract:

Downtown

Budget & Sources of Funding:

Budget:

Phase 1: Project Start-up and Inaugural Murals Project (Small (\$25,000 +/-))

Cost is low for this start-up phase: at start, a public art program for Downtown can include murals, as well as temporary art such as pavement painting, sidewalk chalk, etc., to generate interest and act as marketing for the effort. Budget includes:

- Planning and mapping work: Town staff time (planning, economic development, DPW, transportation, parks). \$0
- Marketing and graphic design work for logo/branding/social media for project: \$1500
- Five Inaugural Murals \$3000 \$4,000 per mural for artists fee (dependent on size and complexity), materials for a total of up to \$20,000.
- Insurance costs require artists to have insurance or use blanket Town policy for the project (allows more artists to participate), if possible.
- Internships/mentoring possible \$15/hour for teens to assist in projects. \$1500
- Materials for temporary projects including chalk, pavement paints, planters, street furniture (tables and chairs). \$500 - \$1000

Optional Phase 2: Regional/Public Health/Community Development alignment with Public Art Project (Medium (\$50,000 - \$100,000)) There are good opportunities here to connect with community organizations, health providers and employers to incorporate in community health and wellness...combat obesity, drug use, etc.

This phase would include expanding the public art program to include public art as trail and trailhead markers for downtown marketing, public health considerations and local health partners, and possibly

teen mentorship and career development opportunities. The budget will depend on the extent of alignment with other Town initiatives (public art as a component of an existing teen after-school program for example, or an employee health program at a major business, etc.) The first step in this phase involve identifying local and regional initiatives or programs that could align with this public art program.

Sources:

- MassDevelopment Technical Assistance
- Mass Cultural Council
- MassDevelopment Commonwealth Places
- Harrington Hospital (community fund or public health initiative funding)
- UMass Medical Center (community fund or public health initiative funding)
- Sturbridge Area Tourist Association (for marketing)
- Discover Central Massachusetts (for marketing)
- Planned infrastructure and other investments where public art can be incorporated (wayfinding, eco-art in stormwater projects, etc.)

Timeframe:

Phase 1 only

Short: 4-12 months to start, ongoing

Temporary art efforts (pavement painting, sidewalk chalk events) can occur in late fall 2021 and beyond, depending on capacity to plan and organize.

Permanent murals can be created in 9-12 months, starting in spring 2022.

Risks:

Low Risk:

- Minimal political and financial risk with opportunity for high gains.
- Liability for mural creation (insurance needed by artists or through blanket Town coverage).
- The collaborative nature of this project minimizes risk further the proposed process enables many stakeholders "to own" this project and reap benefits from its success.

Key Performance Indicators:

- Number of new murals in the Downtown
- Increased foot traffic by residents and visitors
- Increased sales and store/business visits by customers
- Number of participants at temporary art festival or event days
- Number of social media likes, impressions, forwards
- Number of collaborators for project (businesses, nonprofits, etc.)

Partners & Resources

Planning Department

- Town Council
- Parks & Recreation
- Southbridge Farmers Markets
- Optical Heritage Museum
- Business Partnership
- Trails Committee
- Commonwealth of MA Registry of Motor Vehicles
- Harrington Hospital
- U Mass Medical
- Artists
- Public Schools
- Local and regional community nonprofits and service organizations
- Downtown businesses and property owners (providing space and walls for public art)
- Sturbridge Area Tourist Association
- Discover Central Massachusetts

Diagnostic/COVID-19 Impacts

CivicMoxie suggests including info here from phase 1 diagnostic...how were businesses impacted, what do they say they need? What does community want? Some statistics here about survey results can help set up this project in a more detailed way.

The impacts of the Covid-19 Pandemic on Southbridge require a recovery plan that diversifies the range of destinations in Downtown and seeks to enhance the image of the town to attract visitors visiting the area from regional historical and natural destinations, including Town trails, the Blackstone Valley, and the Sturbridge areas. The Town of Southbridge has a number of underutilized public spaces that are adjacent to businesses and are highly visible. In addition, there are plans for the completion of a rail trail through the center of Downtown. There is a central parking lot, a number of downtown alleyways, and a large parcel near the RMV headquarters, which is in the old rail depot building, which is on the National Register of Historic Places. A public art program that includes an inaugural series of five murals and related activities and temporary art events can attract customers to downtown and increase vibrancy in support of business recovery and a renewed image for the town.

Action Item:

Create a Public Art Program Working Group, develop a concise plan for quick action items and a branding and marketing strategy. The public art program would include identified parcels for murals, pavement paintings, and functional art, as well as opportunities for pop-up and temporary artwork. A defining feature of this program will be collaborative and diverse nature of project partners, enabling the project to draw from a wide range of resources, champions, and organizers, while ensuring positive impacts for a range of downtown and community goals.

Process:

Phase 1

- 1. Form a Working Group of 12-16 members to guide and advise the Town on the public art project. Group should include:
 - a. Town Planner (lead)

- b. Economic Development Planner (lead)
- c. Business Partnership member
- d. Parks & Recreation staff member
- e. Trails Committee member
- f. Local business representatives
 - i. Hospitals
 - ii. Other major employers
 - iii. Banks
- g. One or two major property owners in downtown
- h. One or two area artists
- i. Public Schools art teacher or art department head
- j. Executive Director of a community nonprofit that focuses on public health or teen services
- Hire a graphic designer/branding professional to develop a project name, logo and social media template for the project. Contract should give ownership of all materials to the Town, and designer should provide all graphics, fonts, and files for future use by the Town and Working Group.
- 3. Using the details in this project recommendation, create a succinct PPT presentation with overall goals, possible preliminary locations for permanent and temporary art, information on Working Group, and timeline for Phase 1 of the project, and funding needs. Include expected benefits for downtown and for the community.
- 4. Garner support and get feedback and ideas. (Make necessary presentations, e.g., Town Council, Community, Business Partnership meetings, regional tourism groups, etc.)
- 5. Identify Town projects that could incorporate art, including wayfinding and signage that could incorporate art on the back of freestanding signs or include historical info, poetry, etc.
- 6. Using Town Assessor data, contact building and property owners/managers with information on the project and requests for interest from those who wish to provide a wall or spot for public art. Be clear about the "ask" and outline how liability is to be addressed (often a sticking point for property owners). Also outline guidelines for public art content or themes for owners.
- 7. Set criteria for public art locations and create a map showing all possible locations with type of art project suitable. Criteria should include:
 - a. Availability of wall, land, location, and willingness of owner (public or private) to participate in program.
 - b. Visibility of location first five murals should be in prominent locations.
 - c. Number of people passing by in cars or as pedestrians/cyclists for maximum impact.
 - d. Availability of scattered locations of artwork to entice visitors to explore the different parts of downtown and stores and restaurants.
 - e. Ability to connect murals and public art through a public art trail or treasure hunt.
- 8. Develop a plan for temporary events for late fall 2021 OR wait for permanent mural project implementation in spring 2022.
- 9. Secure a minimum of \$25,000 for funding phase 1.
- 10. Develop an RFP for mural artworks with clear guidelines and locations for five inaugural murals. Include photos of locations, overall theme if applicable, and guidelines for content, timeline, artist credentials, etc. Decide on criteria for artist eligibility: local, experience with a certain number of murals, etc.? Consider requiring artists to run a half-day workshop or actual

- temporary art session outside in the downtown to kick-off mural painting contributing to a public art event at the project kick-off.
- 11. Consider using the selection process as a public outreach/marketing opportunity Working Group assessment of proposals could be a public event, or all entries could be displayed in public locations on posters for feedback from community before final deliberations. Be clear on process in the RFP. Announce selected artists and murals through social media and other channels.
- 12. Contract with the five artists and begin mural work in late spring 2022, depending on weather and other conditions.
- 13. Create a map showing the five mural locations and other murals and pubic art in the downtown, update regularly as the public art program progresses. Consider creating a downtown treasure hunt with public art/murals at different scales and in hidden places to attract visitors and customers throughout the downtown (ensuring businesses benefit from public art program).
- 14. Plan for a series of events to celebrate the mural work including:
 - a. Start-up day events including artist-led sidewalk chalk activities.
 - b. Do video and photo documentation to post on Facebook, Instagram, and in other ways for the duration of the project.
 - c. Completion festival (develop strategies for this festival to support local businesses by creating a passport for various destinations in town, featuring local businesses on the mural map, etc.)

Phase 2:

- All steps will be determined after the first phase is underway. This work would include:
 - Planning and coordination for future regional trails connections/markers at trailheads and along paths using public art to market Southbridge Downtown and Public Art Destinations.
 - Expansion of initial murals project to include sculpture, light art, and public events with a broad mission to support the vibrancy and economic health of downtown and local businesses, as well as public health and teen mentorship opportunities:

Project Examples:

Punto Urban Art Museum

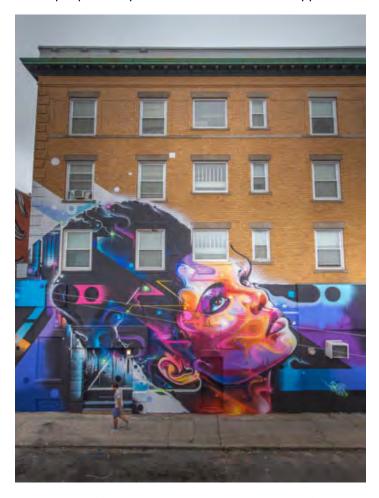
Salem, MA

The Punto Urban Art Museum (PUAM) is a project of the North Shore Community Development Corporation. Located in three blocks of the Punto neighborhood in Salem, the project features 75 large-scale artworks by 30 world-renowned and 25 local artists.

The project has two goals:

- "By creating a walkable, curated open air museum within three neighborhood blocks, the
 district is readily accessible to all that downtown Salem already has to offer to over a million
 tourists per year."
- "Bringing a fraction of Salem's visitors to the Point neighborhood stands to be a transformative economic development boom to immigrant-owned local businesses."

The goals of this project are similar to goals in Southbridge – to celebrate the community and to create connections between locations – in the case of Southbridge, to create a destination for visitors and entice people to explore local businesses and support economic development.



Source: http://puntourbanartmuseum.org/mural/the-queen-of-the-block-2/

Artist: MR Cenz



Source: http://puntourbanartmuseum.org/mural/garden-boy/

Artist: Pixel Pancho



Branding and Coordinated Marketing of Downtown Business District

Prepared by: GOMAN+YORK

Project Title	Branding and Coordinated Marketing of the Downtown Southbridge District
Origin	Planning Staff
Location/Census Tract	Study Area - Downtown Southbridge
Budget & Sources of Funding	Medium - (\$100,000) Costs to engage a marketing and branding advisor and project coordinator. Further costs will depend on the scope of the marketing and branding strategies, number of initiatives, complexities, participating businesses – these efforts should be planned with and ongoing and long-term commitment. Funding of this initiative can be derived from grants that support small business sustainability and economic development for growing new businesses and business awareness.
Timeframe	Short-term – Initial engagement of a consultantor expert to devise strategy will be short-term; implementing the strategy and identifying the funding needed will be ongoing.
Risks	Medium Risk - requires buy in from the Town, and participating businesses and dedicated funding for the program and staff to coordinate the program.
Key Performance Indicators	Increased sales and/or economic activity downtown; Percentage of occupied storefronts; and The stability of the number of businesses that were open in 2019-2021 that will still open 5-10 years later.
Partners & Resources	Planning Department, Downtown businesses, Southbridge Business Partnership, regional organizations (Chamber)
Diagnostic/ COVID-19 Impacts	The Town of Southbridge has a Southbridge Business Partnerships group that meets monthly. However, the Downtown Southbridge LRRP study



	area remains a challenge. It is situated far from major highways and seems to serve as a passthrough for traffic that doesn't seem to stop. There is a high vacancy rate of street level storefronts as a result of many factors, including absentee owners, along with the loss of business and traffic due to the Covid-19 pandemic.
	The Town would like some assistance on how it can help bring these businesses together to help the ones who are struggling and attract new businesses willing to locate in Southbridge.
	There seems to be a focus on what the town was before with a large employer that left the area many years ago – focus should be on what the positives are now and what the future holds for the area.
	It is important to note that there are positive things happening in the Downtown area with the opening of a new recreational marijuana store, the rehab of building that will have restaurant and residential and new residential development in the area. It has a historic feel with the architecture of the downtown buildings
	These positives can be used to promote a "new Downtown" brand and marketing campaign that will support and raise awareness of the current businesses and, secondly, to foster and promote economic development in the Downtown.
Action Items	 Create branding based on identity or theme of district that will create recognition of the Downtown area with the intent of increasing sales and traffic. Build off branding from other parts of Town to add distinction to
	 the area, yet identify it with the rest of the town Develop marketing opportunities to raise awareness of the Downtown – events, arts, promotions Encourage recruitment and growth of new businesses and
	promotion of current businesses
Process	Select a team to work on this effort – it should be comprised of key stakeholders from the town - officials, cultural representatives, and business owners. This team should work to determine the "New Look" of the area and consider the various uses of the brand. Simultaneously you should identify funding for this project and create signage or other physical assets for the district.
	Hire graphic designer – consider using a local designer that knows the area and can reflect that in the design that this is a special and unique area of Southbridge. The designer should also be able to apply this new look to your marketing efforts – for various applications and for use by the area businesses. Consider a tagline that fits your community and works to identify



it.

To get stakeholder and community buy in hold a community meeting to review the branding and marketing strategy.

Brand Uses & Recognition – Once the brand is established it can be used in various applications – this should be seen as a starting point for other projects that were proposed through the LRRP initiative – i.e., wayfinding signage, events, economic development, and communications.

Marketing Effort

Develop a Marketing and Communications Plan – Consider if this is done inhouse or if there is a need to hire a communications professional. This will affect your budget structure. Consider utilizing an intern from a local college or funding this position to both market the district businesses and to help market the district in support of and to foster economic development.

This plan will be the roadmap to enhance the Downtown brand year-round and should incorporate how you communicate that "Downtown Southbridge is a great place to be and visit" – i.e., develop hashtags for social media, what sources can be utilized for messaging for businesses, to the public and the surrounding communities.

Consider linking to and expanding the Town website with a tab or section that features "Visit Southbridge" with a calendar of events, listings of businesses and restaurants. Also consider revamping the Doing Business section to encourage new business development and attraction.

This plan include events marketing for the area – focusing on events that should encourage patrons to explore the Downtown area.

Build on and complement what has been done in the area – New and current businesses, culture and amenities of the area should be highlighted in marketing and social media efforts. Design guidelines are in place that can help to formulate your marketing and branding efforts as they relate to signage and storefront.

Concentrate on the Excitement in the area — Focus should be on new and existing businesses, not what's wrong with the area, but what's great and unique about it and its businesses, history and culture. The revitalization taking place is a start-off point for what's new, what's here and what's to come in Southbridge. Focus on drawing people Downtown from the other areas in the town and region. Activities and restaurants will serve as draws for Downtown.

Provide training and support for local businesses for marketing their businesses individually and in a shared format – social media, geo-targeted advertising, sales and events marketing programs will serve to enhance



promotion of the district.

Enabling businesses with the ability to self-promote and better market their businesses will serve to draw more traffic to the area. Business workshops are an great tool not only for the businesses, but a way to form a sense of cohesiveness within the business community.

It is important that your Downtown storefronts look their best – you may consider asking downtown businesses or a "sub-committee" of the SBA to do a self-assessment of the stores, then have that group share their findings and look for common actions and improvement that will help all. Items to assess include storefronts, window displays, signage, visibility, inside appearance/comfort/attractiveness, etc.

Remember that marketing is not just advertising – it's how you present your Downtown and its businesses to customers, visitors and potential companies looking to open in Southbridge..

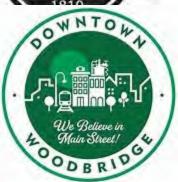
Consult the Compendiums on business assessments by Goman+York and others on events and marketing efforts for Downtown Districts – Pledge to Support Local; Coordinated Social Media Marketing and more can be used for examples. Below find examples of brand logos for Downtowns.











Rapid Recovery Plan

Outdoor Dining/Retail Community Toolkit

A guide for communities seeking to assist business owners in creating outdoor dining and retail options





This Toolkit has been made possible through technical assistance provided by the Baker-Polito Administration's Local Rapid Recovery Planning program.





The Local Rapid Recovery Planning (RRP) program is a key part of the Baker-Polito Administration's Partnerships for Recovery Plan. the strategy established to help communities stabilize and grow the Massachusetts economy as a result of the economic impacts brought on by COVID-19. The plan invests \$774 million in efforts to get people back to work, support small businesses, foster innovation, revitalize downtowns, and keep people in stable housing.

In addition to the planning program, recovery efforts include a Small Business Relief Program administered by the Massachusetts Growth Capital Corporation. This program, which concluded in May 2021, provided more than \$687.2 million to over 15,000 businesses across the Commonwealth, with a focus on businesses located in Gateway Cities, among demographic priorities, or operating in sectors most impacted by the Pandemic. Cities, towns, and non-profit entities are using Regional Pilot Project Grant Program funding for recovery solutions that seek to activate vacant storefronts, support regional supply chain resiliency, and create small business support networks. To promote recovery in the tourism industry and support the ongoing My Local MA marketing initiative encouraging residents to support their local economies by shopping, dining and staying local, another \$1.6 million in grants were awarded through the new Travel and Tourism Recovery Grant Pilot Program. Through April 2021, MassDOT's Shared Streets and Spaces Grant Program has invested \$26.4 million in municipal Shared Streets projects to support public health, safe mobility, and renewed commerce.

In support of the overall recovery strategy, the Administration made \$9.5 million in awards for 125 communities to create Local Rapid Recovery Plans, through the MA Downtown Initiative Program. These plans address the impacts of COVID-19 on local downtowns and small businesses by partnering with Plan Facilitators and Subject Matter Experts to pursue locally-driven, actionable strategies.

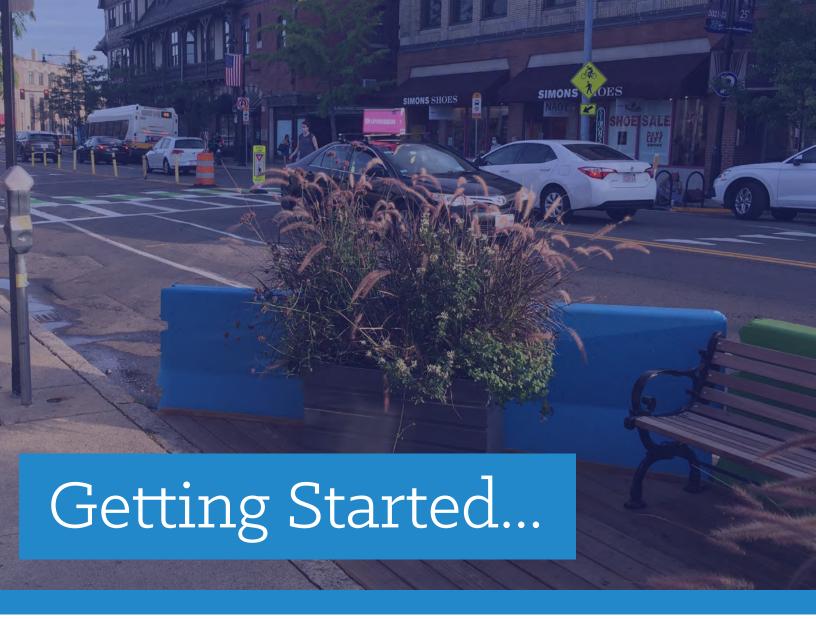
For more information, contact DHCD: 100 Cambridge St, Suite 300 Boston, MA 02114 617-573-1100 mass.gov/DHCD

Toolkit prepared by:



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Why this Toolkit

Outdoor dining and retail options in local commercial districts blossomed during the early days of the COVID-19 Pandemic as towns and cities made a quick pivot to respond to the needs of businesses and residents. Understanding potential benefits to long-term community and economic development, many businesses and communities now seek to make permanent the temporary outdoor dining and retail options that have sprouted up in their commercial areas.

This Toolkit responds to this need. In the Local Rapid Recovery Program, questions of outdoor dining and retail – enacting permanent ordinances, providing clear design guidelines, offering assistance on use of materials and perhaps even bulk purchasing, compliance with ADA, and navigating local and state regulations – have been among the most common issues raised during the planning process. Businesses want certainty before investing capital in furniture, construction, and equipment. Communities want to ensure outdoor dining and retail options are created with some semblance of aesthetic order and that they meet safety standards. This Toolkit presents the most common questions in the LRRP and provides a guide for each community to move forward in creating its own set of guidelines for businesses and internal streamlining of requirements.

How to use this Toolkit

Think of this LRRP Toolkit as a guide for your own local government outdoor dining and retail decisions, regulations, and assistance to businesses. Every community is different, and some are further along than others in thinking through their outdoor dining and retail process. This Toolkit responds to the need for each community to take it's own unique approach by offering suggestions for design guidelines, asking a series of questions for municipalities, and providing examples from other communities. It's all about offering you flexibility and multiple options.

To this end, this Toolkit can be used by communities in three ways:

YOU NEED HELP ON A FEW INDIVIDUAL ITEMS FROM THE MUNICIPAL SIDE - things such as writing and passing bylaws and ordinances to make outdoor dining and/or retail permanent; streamlining permitting/ licensing; creating design and material standards, etc.

YOU WISH TO PROVIDE USEFUL INFORMATION AND ASSISTANCE TO BUSINESSES - things such as space guidelines for setting up socially distanced dining in a standard parking space; information on ADA requirements; suggestions or requirements on materials to be used, etc.

YOU WANT TO CREATE A FULL OUTDOOR DINING/ **RETAIL STEP-BY-STEP TOOLKIT FOR BUSINESSES -**

a pdf/packet and perhaps online, with all the information a business needs to create an outdoor space, including municipal requirements and guidelines, as well as suggestions for space, materials, aesthetics, and more.

Toolkit Checklist

Use this checklist to understand what you need and how this Toolkit can be most useful to you.

Par	t 1: Guidelines for Communities	
regar and, unde	will find a list of topics that your community may want rding outdoor dining/retail. Each topic includes possib in some cases, examples from other communities (in terstanding that you don't necessarily want to reinvent frou do want to tailor it for your needs).	le solution The
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	implementing a Business Toolkit and for providing help to businesses in other ways.	
	providing help to bosinesses in other ways.	
	We want a template for our own complete	p. 55
	outdoor dining/retail Toolkit. – See Part 2 for	
	this information!	
P	art 2: Putting It Together	
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	insert in any document of offiline resources you offer	
	Suggested Outline for a Toolkit/Resource	
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Choose the critical sections to get started! To do this, we recommend that you gather all the relevant Town or City staff to discuss how to ease the process for businesses to extend their dining and retail to outdoor spaces. You might give staff a copy of this Toolkit and then discuss what elements you want to provide. Collaboration and cooperation are key here. Those communities that acted quickly during the early days of the Pandemic and made the process work best for staff and businesses where those that brought municipal departments and staff together to problem-solve and communicate constantly. That same spirit of cooperation and collaboration applies here...

We want to...

STREAMLINE THE PROCESS FOR BUSINESSES TO CREATE OUTDOOR DINING/RETAIL UNDER EXISTING STATE REGULATIONS.

When we say "streamline the process," it can include all or some of the following goals:

- Offer a **single application** for businesses to apply for permits and licenses to provide outdoor dining and retail.
- B Offer an **online application** to help businesses save time.
- Provide a checklist of all requirements.

Provide a **liaison at City or Town Hall** to guide businesses through the outdoor dining and retail rules and requirements.

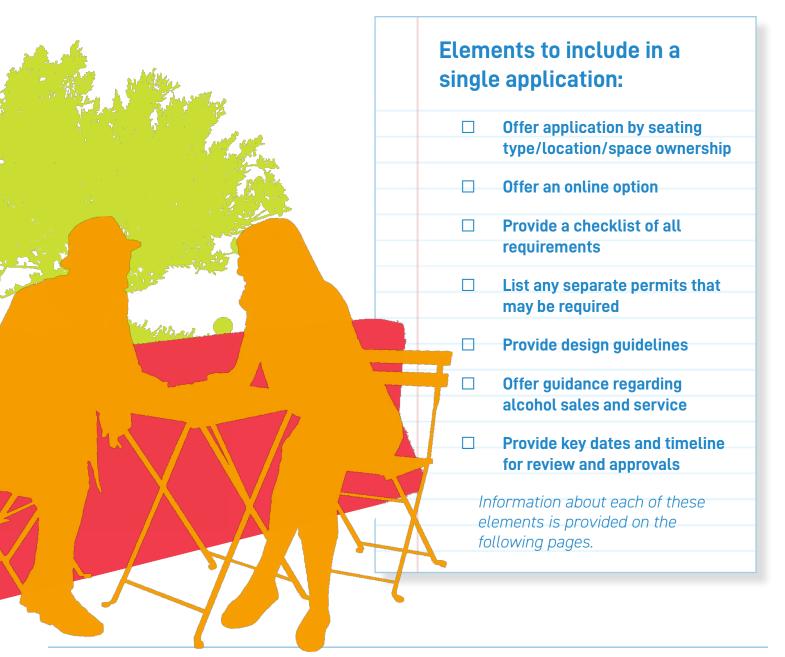
- Create a short-track or condensed timeline for permitting and approvals by coordinating Town or City inspections and reviews.
- Provide clear design guidelines and other requirements that take the guesswork out of providing outdoor dining and retail.
- Offer bulk purchasing of common items needed for outdoor dining and retail to get better prices for businesses and standardize select items that may be hard or confusing to source.



The choices on the previous page aren't mutually exclusive and you may choose to combine various methods of streamlining applications. For instance, some communities will offer a single, online application and also provide a short-tracked permitting and inspections process. If they offer design guidelines and a complete Toolkit for businesses (using this Toolkit as a guide, of course!), that's one more way to streamline the entire process for businesses. We cover these scenarios in various places in this Toolkit.

Offer a single application for businesses to apply for permits and licenses to provide outdoor dining and retail.

Creating a single application makes a simple process for businesses and municipal staff. A single application replaces all other permit and license forms that would typically be required for outdoor dining or retail. One required application also gives assurances to businesses that they are not missing any key steps.



part o	nation that is typically required as f an outdoor extension application
includ	les:
	Business name and contact information
	Business manager and property owner
	ABCC license # (if applicable)
	Proposed hours of operation
	Location of outdoor seating (parking lot, sidewalk, etc.)
	Proposed number of tables and chairs and seating capacity
	Site plan and materials list
	Proof of Occupancy/Control of Premises" - usually a lease or a deed or written permission from property owner if not the licensee.

Application by seating type/location/space ownership

Some municipalities opt to incorporate all types of outdoor seating into a single application and others have a different application depending on the type. For example, Brookline, MA has a single application on which the applicant selects their proposed outdoor dining type classified by location. As illustrated in Part 2 of this Toolkit, categorizing applications by the proposed location or by ownership of the space (public or private) makes good sense as different considerations (and different municipal permits and review) come into play if seating is proposed for the street or a sidewalk.



How others are doing it...

Single application requiring outdoor dining type by location Brookline, MA

1)		hat type of outdoor dining configuration are you proposing? (See Outdoor Seating nfigurations section of the Town of Brookline's Outdoor Dining Program Regulations and				
		idelines effective April 1, 2021 for reference.)				
		Façade Seating: Outdoor seating located on the sidewalk immediately adjacent to a building				
		Curbside Seating: Outdoor seating located on the sidewalk along the curb				
		On-Street Seating: Outdoor seating located in parking spaces in front of a restaurant storefront.				
		 Protective concrete jersey barriers required for on-street seating. Contact Todd 				
		Kirrane, Transportation Administrator, to request review				
		of your location and installation of the jersey barriers.				
	П	Combination Façade & Roadway Seating				
	I	Combination Curbside & Roadway Seating				



How others are doing it...

Separate applications — private and public property

Northampton, MA Two applications, one for seating on **private property** and one for seating on

public property.

A general application that all applicants must fill out for outdoor dining, Worcester, MA

plus a supplemental application for use of a public sidewalk, which is in lieu

of the Sidewalk Use permit that would typically be require

Saco, ME Three separate applications for proposals on private property, public

sidewalk, and public parking. Applications can be submitted for both

outdoor dining and outdoor retail.

What's happening at the State...

Per An Act relative to extending certain COVID-19 measures adopted during the state of emergency, a municipality's local licensing authority (LLA) can approve applications for an extension of outdoor table service until April 1, 2022 without the need to provide advance notice to abutters or hold a public hearing on the application. The State has not explicitly allowed this bypass for other forms of outdoor business, such as retail, other than table service.

At present, businesses that have been granted an outdoor extension of their premises through this expedited process will revert to their pre-approval status after April 1, 2022.



Boston, MA The City of Boston has a good example of an application checklist

CITY of BOSTON 2021 Outdoor Dining Program: Application Checklist Before you submit your application, please review the following checklist. This checklist provides an overview of the documents that you will need to prepare and upload with your application. Please reach out to 2021outdoordining@boston.gov if you have any questions after reviewing. Documents required from every applicant: ☐ Copy of Licensing Board License: Please have ready a copy of your Licensing Board License (example here) to upload. You will also be required to enter your license number. ☐ Site Plan: A site plan drawing of the proposed outdoor dining extension will be required. This may be hand drawn. It will need to include square footage, access to and from the licensed premise, and location and number of tables and chairs. See the 2021 Guidance <u>document</u> for more information on site plan and site set-up requirements. **Recent Photo(s) of Proposed Location:** You will be required to upload at least one and up to three recent photos of the proposed location of the outdoor dining extension. These photos will be used to give reviewers a better understanding of the location, so please upload clear photos from several angles to assist with review. ☐ Photo of Proposed Barrier(s): You will be required to upload a cut sheet, diagram or image of the proposed type of barrier to be used to create separation from traffic (e.g. planters, water filled barriers, wooden barriers). Please note: Barriers are needed for both sidewalk seating and on-street seating. Legal Right to Occupy: If you are applying for an extension on private property, you are required to submit a letter from the landlord granting the right to utilize the space. If you are applying for an extension on public property, legal right to occupy will be granted if your application is approved through the 2021 program application. See the 2021 Guidance document for more information ☐ Certificate of Inspection: Please have ready a copy of your most recent Certificate of Inspection (example here), whether current or expired. ☐ Health, Safety and Operation Plan: Please have ready a Health, Safety and Occupation Plan that adheres to the information outlined <u>here</u>. These plans should include the following: ☐ Description of proposed service □ Structures separating patrons from (including staffing levels, days of the traffic

Source: https://docs.google.com/document/d/1LoOFKnBwFAyn7LwhymFI-eCY25Dtlvkf2J3ZYarzkWA/edit

■ ADA accessibility

operation)

☐ Maintenance and storage plan (will tables

□ Safety plan (what steps are being taken to

ensure materials do not enter the travel

and chairs be removed when not in

week, hours of operation)

□ COVID-19 precautions for

& supervised

distancing plan

lacktriangle Overview of how the extension will be

employees and patrons & a social

separated from the non-licensed area

List any separate permits that may be required

It is important to explicitly identify any required or optional elements that need a separate permit application from the business. It is up to the discretion of the municipality to decide which elements to include as part of the primary application and which require separate permitting. When possible, streamline the process by designating pre-approval for certain equipment and models that have been vetted to remove uncertainty on the part of the businesses. Common examples of things that may require separate municipal approval/permitting include:



Tents/Canopies

Shrewsbury: All tents need a permit from the Building Dept.

Brookline: Tents or canopies exceeding 120 sq. ft. need a permit from the Building Dept.

Boston: Tents and canopies are not permitted in public outdoor dining spaces (umbrellas allowed). Tents on private property need approval from the Fire Dept. and Inspectional Services Dept.



Platforms (for parklets)

Boston: For a parklet-style deck, a photo of the proposed deck location and sketch of the proposed deck, including materials, dimensions, and drainage clearance, are required.

Worcester: Decks, platforms, and other structures may require a building permit.



Outdoor Heaters

Northampton: Provides guidance for use of heaters and requires inspection by the Fire Rescue Dept. and Building Dept. before operation.

Brookline: Temporary use of propane heaters must be approved by the Fire Dept. Electric heaters must be permitted by the Town's Electrical Inspector.



Sidewalk Use/Obstruction

Worcester: Supplemental application for sidewalk dining required in lieu of normal Sidewalk Use permit



Offer an online application

Online applications help ease the process for businesses and can be done two ways:

- If your municipality already has an online form center or portal for submitting permit **applications,** this is a streamlined way to allow applicants to attach any necessary uploads directly to their application and submit all in one place.
- If you don't have a public portal for applications and other submittals., an alternative option is to provide fillable PDFs that applicants can submit by email along with any other necessary attachments.

Hard copy applications should also be available upon request for applicants who may lack internet access or proficiency.



How others are doing it...

Online portal and form center for business applications. Northampton, MA

Worcester, MA

Fillable PDFs that are emailed by applicants with required attachments.



Provide a liaison at City or Town Hall

Designating someone as the single point person at City or Town Hall can help ease the process for businesses that have questions about outdoor dining permitting and provide one stop shopping. This liaison can also serve as the coordinator of staff and department requirements...providing a consistent presence and source of information. The liaison can also report back on barriers or challenges in the permitting process and initiative changes in response to real time feedback from businesses and public sector collaborators.



E

Create a short-track or condensed timeline for permitting and approvals

By coordinating Town or City inspections and reviews, and possibly eliminating or shortening some public review processes,* the overall timeline from application to permit approval can be shortened, helping restaurants make quick pivots to retain customers and staff.

In addition, providing clear timelines for permitting...from application submittal through inspections and approvals, helps businesses stay on track and prevents misunderstandings and missed deadlines. Time is money for businesses; important information to include in the timeline includes:

- Date the application process opens (if applications are seasonal)
- Overall estimated time from submission to municipal decision
- Outline any public review periods that are required*
- The application deadline and any intermediary deadlines, such as site inspections, municipal grants, or materials for loan (if applicable)
- When the outdoor dining/retail season begins and ends (if applicable)

* Your community may wish to eliminate or shorten public review periods for outdoor dining and retail applications in instances where all design guidelines and other criteria are met by the applicant with no requested waivers.

Outdoor Dining/Retail Toolkit



How others are doing it...

Boston, MA

An example of a timeline of key dates from **Boston's 2021 Outdoor Dining Pilot Program website**

KEY DATES

DECEMBER 9, 2020:

The 2021 Outdoor Dining Pilot program announced. Our online application opens for Licensees on this date.

JANUARY 18, 2021:

The initial deadline for licensees to submit an application to receive a decision or follow-up questions from our team by **February 19, 2021**. Licensees may also submit an application after this date to participate. We review these applications on an ongoing basis.

FEBRUARY 19, 2021:

We will notify licensees of approvals or requests for more information by this date if they submitted their application by January 18, 2021.

Key Dates as shown on the City of Boston's Website,

Source: https://www.boston.gov/departments/licensing-board/2021-outdoor-dining





Provide clear design guidelines and other requirements including alcohol licensing checklist of all requirements

Businesses have expertise in menus, food, dining experiences for customers, service, and in the case of outdoor retail, displays and signage. The design and construction of outdoor dining and retail can stymie the most sophisticated business owner...it's just not part of their expertise and experience. Guidelines can help! If you wish to provide guidelines for businesses, see the separate section on this topic below and actual guidelines in Part 2.

What's happening at the State...

The Massachusetts Alcoholic Beverages Control Commission (ABCC) has the following general regulations for licensed established to serve alcohol on patio and outdoor areas:

- i. Alcoholic beverages cannot be served outside of a licensed establishment unless and until an application to extend the licensed premises has been approved.
- ii. An application to extend the premises must describe the area in detail, including dimensions, seating capacity, and maximum occupancy.
- iii. The premises must be enclosed by a fence, rope, or other means to prevent access from a public walkway.
- iv. The outdoor area must be contiguous to the licensed premises with either (a) a clear view of the area from inside the premises, or, alternatively (b) the licensee may commit to providing management personnel dedicated to the area.
- v. The applicant must have a lease or documents for the right to occupy the proposed area.
- vi. The licensing authorities should consider the type of neighborhood and the potential for noise in the environs.
- vii. Preferred are outdoor areas where alcohol is served to patrons who are seated at the tables and where food is also available.



Previously, an application to extend the licensed premises to serve alcohol in a new outdoor area had to be approved by both a municipality's local licensing authority (LLA) and the ABCC. However, per Bill S.2475, An Act relative to extending certain COVID-19 measures adopted during the state of emergency, LLA's have been granted the authority to approve the extension of licensed premises until April 1, 2022 without the need for ABCC approval. This means allowing alcohol service in a public outdoor space, including a space across the sidewalk, is fully at the discretion of the LLA. After approval, the LLA must notify the ABCC of the amended license.

As with outdoor dining in general, businesses that have been granted an outdoor extension of their premises for alcohol service through this expedited process are presently scheduled to revert to their pre-approval status after April 1, 2022. If a business is seeking to extend their premises for outdoor alcohol service beyond April 1, 2022, they must follow the ABCC's usual regulations for Alteration of Premises/Change of Location. This consists of submitting an application to the LLA for approval, which then gets forwarded to the ABCC for approval.

Businesses that wish to serve alcohol in an outdoor space that does not fit the regulations above, such as in a non-adjacent space or without table service, can apply for a One-Day Special Permit through their LLA. Restrictions on the type of alcohol that can be sold vary depending on the type of business and the nature of the event. For-profit events may only sell wine and/or malt beverages under the One-Day Special Permit. This permit can only be utilized for a single day, but there is no limit to the number of permits a business can apply for, only that they cannot be granted to an individual person more than 30 times in one calendar year.

Offer bulk purchasing of common items needed for outdoor dining and retail

Some equipment or materials may be specialized and also need to meet safety requirements. Items such as outdoor heaters have to meet fire safety or electrical codes, and the storage of propane fuel, if used, can be complicated. Additionally, items such as platforms to raise on-street parking spaces to sidewalk height are fairly standardized but require construction knowledge and structural design. To get better prices for businesses and standardize select items that may be hard or confusing to source, towns and cities may choose to bulk purchase items on behalf of businesses. If you are interested in doing this, see page 36 for additional information.

We want to...

MAKE OUR TEMPORARY/ **EMERGENCY OUTDOOR DINING/** RETAIL REGULATIONS PERMANENT

Communities are now considering the next steps to shift from temporary/emergency outdoor dining and retail measures to permanent zoning and bylaw changes. The cost of a small outdoor seating area in a public parking space can be well over \$25,000, including materials, construction costs, and new furniture and equipment. For many small businesses, this size of capital investment is a challenge, and even more so if there is no certainty regarding the ability to continue outdoor operations post-Pandemic. Instituting permanent zoning and bylaw changes provides certainty for everyone involved.

Zoning Code Changes

Zoning code and bylaw changes can make outdoor dining and retail options permanent throughout a municipality or in selected geographic areas or zones. Some considerations should be:

What boards and committees must review any proposed changes, and what time is needed to do that? Examples can include: economic development committee; business district committee; planning board; city council or town selectboard, etc.

Allow enough time to enact permanent changes before any municipal emergency/COVID-19 **outdoor dining and retail programs expire.** We recommend six months, if possible. Your community may have to extend its emergency COVID-19 program in order to keep something in place until a permanent program can be adopted.

Consider any limitations you currently have on the length of time outdoor seating is allowed at any **one time.** Some communities limited outdoor seating to six months, or to actual dates. Should these be lifted? Do you wish to encourage year-round dining? See the section on winter outdoor dining below for additional information

Which temporary outdoor dining/retail measures or program elements do you wish to retain? What additional guidelines or elements do you wish to add to a permanent program? We hope this Toolkit provides useful information to answer these questions.

What are the benefits and costs for a permanent program? See the separate section below for information on what to consider.

The Importance of Local Voices

Some key temporary changes that were made to streamline the outdoor dining permitting process in response to the COVID-19 Pandemic were done at the state level. This included eliminating some public process requirements that can slow implementation, such as holding a public hearing and giving advance notice to all abutters, and forgoing the need for the ABCC to approve outdoor extensions of premises to serve alcohol.

While individual municipalities may not have the power to make permanent changes to these state laws, they can be influential voices to advocate for permanent adoption of temporary changes that have proven beneficial to their business communities. Local business organizations, chambers of commerce, and municipal leaders and staff should make their preferences known and provide stories of the positive benefits they have seen from COVID-19 temporary changes to their state Representatives.





How others are doing it...

Haverhill, MA

In 2004, the City of Haverhill, MA enacted an Outdoor Dining Permit Ordinance that defined and streamlined the outdoor dining process within their Commercial Center zoning district. In response to higher demand during the COVID-19 Pandemic, they streamlined the permit approval process further by moving initial permit application review from the License Commission to Inspectional Services. Using OpenGov, after Inspectional Services gives approval, it automatically triggers the application to be sent to the City's other regulatory bodies that need to review.

Brookline, MA

Brookline, MA is seeking to adopt new General and Zoning Bylaws to create permanent outdoor dining in the town by:

Extending the outdoor dining season from a 6-month maximum to vear-round

- Allowing outdoor seating in parking space parklets and privately-owned areas adjacent to restaurants
- Streamline the application process by replacing Planning Board review with Planning and Community Development Department staff review

At **2021 Spring Town Meeting** the Brookline Select Board voted in favor of these changes, following a presentation of rationale delivered by the Department of Planning and Community Development.

New York, NY

New York City is working on a permanent **Open Restaurants** program that would change zoning text to remove geographic restrictions on where in the city sidewalk cafes can be located and consolidate all applications under one agency.

We want to...

PROVIDE DESIGN AND MATERIALS GUIDELINES TO BUSINESSES

Design Guidelines

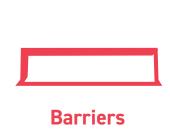
Perhaps the greatest positive impact a municipality can provide to businesses is to offer design guidelines for outdoor dining and retail spaces. These guidelines can save time – for research, design, codes compliance, ADA requirements, etc. Strong guidelines can also be critical to convince municipalities that they can allow uses by right, if the guidelines are met, and eliminate or reduce discretionary review.

Part 2 of this Toolkit contains sample design guidelines for a variety of outdoor dining and retail situations. Municipalities may distribute relevant samples to businesses in their communities as guides or use these samples as a resource to create their own guidelines. All outdoor dining and retail must meet state accessibility requirements; Outdoor Dining/Seating Fact Sheet for **Accessibility Requirements** is attached to this Toolkit at the end of Part 2.

When establishing guidelines for outdoor spaces adjacent to the curb, whether on the sidewalk or in on-street parking, it is important to identify existing curbside uses that prohibit the implementation of outdoor dining or retail.

Materials Guidelines

Materials guidelines can help provide an overall aesthetic framework while allowing businesses to express their individual brand/style and meet any code or other municipal requirements. There are several categories of materials that must be considered for an outdoor dining or retail space:







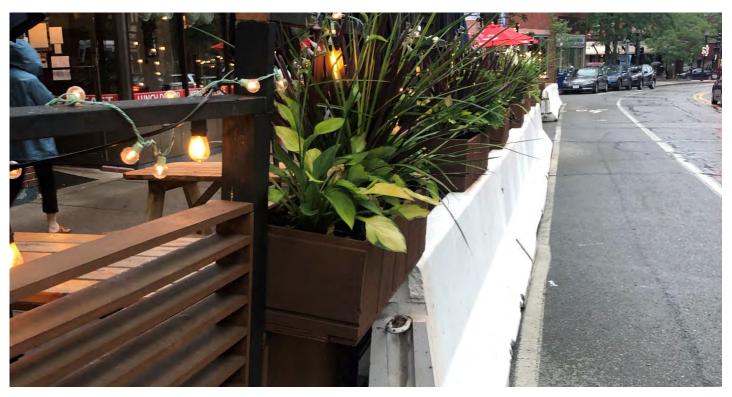


Parklets

Barriers

There are two categories of barriers that a business may need to use: protective barriers and separation barriers.

Protective Barriers are used when an outdoor space overlaps/abuts with motor vehicle space, with the most typical scenario being the use of a parking space in the street or in an active parking lot. Protective barriers are sturdy and heavy and must meet any requirements of local Department of Public Works or Transportation Department. A common practice is for the municipality to provide and install these barriers and remove them at the end of the outdoor dining/retail season, if applicable. Examples include concrete and water-filled jersey barriers and heavy planters, such





How others are doing it...

Boston, MA

In its **outdoor dining guidance document**, the City of Boston has identified the following curbside uses where conflicting outdoor dining requests will not be approved:

- 10' clearance on either side of a fire hydrant
- Handicap accessible parking
- No stopping
- Travel lane
- Bike lane

- Bus lane
- Crosswalk
- Fire access lane
- Bus stop
- Bike share station
- Car share space

as those weighted with sandbags. Protective barrier height minimums and maximums vary by municipality, though these are typically at least 30" high. The required extent of protective barriers varies by municipality, but at a minimum they should be placed where there are potential conflicts with forward-moving traffic.

Jersey barriers and water-filled barriers lack aesthetic appeal, and various strategies exist to beautify these enclosures, including treating the jersey barriers as a canvas for paint (see example below). We suggest another strategy which could benefit from municipal coordination: at 24" wide, iersey barriers take up considerable room and restaurants often then add another material or screen on the dining side of the barrier for aesthetic reasons and to support planter boxes, lattice, etc. Combining the aesthetic treatment with the barrier itself could reduce the space needed and provide a good solution to beautifying the barriers. A standard enclosure for this barrier consisting of a box, constructed of marine-grade plywood, with a planter space built in at the top could improve aesthetic appeal and regularity while allowing for individualization for each outdoor dining or retail area through the paint and details used.



How others are doing it...

Beverly, MA Salem, MA

Some businesses are paying artists directly to paint jersey barriers around their outdoor dining spaces. In other cases, cities and nonprofits are covering costs and providing a framework for a larger beautification effort around outdoor dining and retail barriers. In downtown Beverly and Salem, the Creative Collective's "Jersey Barrier Beautification" Project" has used \$35,000 to pay approximately two dozen artists to paint jersey barriers. Artists' payments run \$200 per barrier and up.



Colorfully painted protective barriers outside of Bambolina Restaurant in Salem, MA. Source: Karl Alexander

In most cases the appearance and maintenance of barriers is the responsibility of the business using them, and allowing businesses to paint or decorate barriers can create a more inviting and visually pleasing space or streetscape. An optional program add-on could be a public art project through competition or general matches of artists with businesses. Municipalities might consider providing grants to pay artists to paint jersey barriers and other protective barriers along the public street or right-of-way.

Separation Barriers are not intended to provide protection but are used to demark outdoor dining or retail space from pedestrian or public space. Planters, fencing, and lattice are commonlyused separation barriers. For spaces in parking areas, separation barriers are used where protective barriers are not present to create a full enclosure with no gaps leading to vehicular circulation areas.



Wood and screens are used to create separation barriers for a sidewalk café outside of a New York City restaurant.

State Regulation

Per ABCC state regulations, any outdoor space where alcohol is being served, whether public or private, must also be enclosed by barriers to prevent access from a public walkway. For outdoor spaces not in a parking area and without alcohol service, separation barriers are not universally required, and it is up to the discretion of the municipality to decide when they are needed.

Regardless of the type of barriers used, they should not be bolted down or fastened to the ground or other objects without municipal approval. The outside of barriers in a parking area may also need reflective strips if they do not already have reflective surfaces.

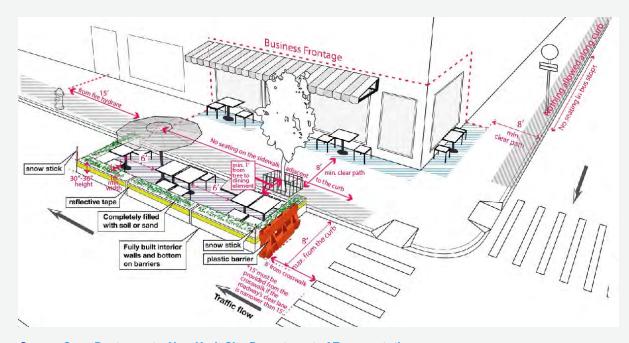
It should be noted that while the use of jersey barriers and other protective barriers has been implemented as standard operating procedure for outdoor dining in communities across Massachusetts, this standard was designed as part of rapidly rolled out programs using available equipment and is not based on universal best practices. In other parts of the country and the world, outdoor dining has been implemented with minimal or no protective barriers, which has certain benefits including sleeker and more attractive design and easier setup and removal, particularly in preparation for snow storms in areas where outdoor dining operates year-round. As municipalities are formulating permanent regulations to allow outdoor dining, additional research is needed on the value of protective barriers, including providing real safety benefits as well as customer perception of safety.



How others are doing it...

New York, NY

Protective barriers at least 18" wide are required on the side of the outdoor dining enclosure facing forward-moving traffic. As an alternative to jersey barriers, businesses are allowed to use barriers that are completely filled with soil or sand. The City has standardized the enclosure required for all outdoor dining in public parking spaces on the roadway to include planter boxes which, while having set dimensions, can be decorated and filled as each business desires. This is an effective approach to creating some visual order while allowing individual creativity at each business.



Source: Open Restaurants, New York City Department of Transportation



How others are doing it...

Portland, OR

Outdoor dining areas in parking spaces on streets with speed limits of 25 MPH or less do not require protective barriers (separation barriers are required). On streets with speed limits higher than 25 MPH, a traffic control plan is created in coordination with the City's transportation department.



Furniture

For outdoor dining spaces, furniture typically consists of tables, chairs, benches, and bike parking, and perhaps a type of overhead covering, such as umbrellas, tents, or awnings. Outdoor retail furniture can include racks, tables, merchandise stands, and shelving. Access within the space and access to, and use of, the furniture must comply with the state accessibility requirements, included in Part 2. Individual municipalities may have additional accessibility requirements or guidelines that affect furniture placement and considerations. If this is the case, we strongly recommend your municipality specify that your requirements are inclusive of state requirements OR combine your local requirements and the state requirements into one document...including the most stringent, as applicable, so that businesses do not have the confusion of comparing and choosing between the two.

When not in use, furniture should be brought inside or secured and locked together to prevent any possible obstruction of the public right-of-way. Furniture should not be stacked outside or secured to any other objects, such as trees, streetlights, or barriers. As with barriers, businesses are responsible for maintenance, and furniture should be easily movable and not bolted or fastened to the ground.

State Regulation

Per the **Governor's COVID-19 Order No. 35**, overhead covering must have at least 50% of the perimeter open and unobstructed by siding at all times. For example, if a tent is used, at least two sides must be open to the air without walls or siding. As mentioned earlier in Part 1, tents or canopies often require separate permitting to ensure they are set up and secured properly, that they are not fire hazards, and that they don't obstruct sightlines for road users. Umbrellas are normally allowed without separate permitting granted they meet the same conditions.



Heaters

Heaters are an important consideration for outdoor dining, especially to extend the outdoor dining season or when allowing all-season outdoor dining. Like canopies, separate permitting is often required for heaters to ensure they are in compliance with regulations and not fire or safety hazards. The two types of commonly used heaters are propane heaters and electric heaters. Municipalities are encouraged to continue adhering to their existing permitting and regulations for heaters.

While portable heaters are often less expensive than installing electric heaters (which require building permits and a licensed electrician), a particular obstacle for the use of propane heaters is the requirement for storage of propane tanks, which should not be stored inside buildings but only in approved structures or cages.



How others are doing it...

Brookline, MA

As a resource, the Town of Brookline, MA established a pilot program for permitting portable propane patio heating equipment to support businesses in establishing outdoor dining.



Parklets

Accessibility of Spaces - Ramps and Parklets

The common scenario of outdoor dining in an on-street parking space presents a challenge for accessibility. The difference in grade level between the sidewalk and street is typically a 6" curb height. To meet accessibility requirements, a ramp to access the lower street level from the sidewalk or a full platform (also known as a parklet) to bring the street level space up to sidewalk level must be constructed.

Platform parklet with a ramp, Portland, Maine



Diners eat on a parklet in New York City.



Platform dining, Portland, Maine

Ramp

Accessible ramps must have a maximum slope of 1:12 which means for every 1" in grade difference the ramp must be 12" long. This requires a 6' long ramp for a 6" curb height. Ramps should be a minimum of 4' wide and must have 4' of clear space at the bottom and top. The size requirements for a ramp cuts into usable outdoor dining and retail space and while less expensive to construct than a full platform, may be impractical for smaller outdoor areas. Part 2 has more information about ramps.

Platform/Parklet

A parklet is an extension of the sidewalk into an onstreet parking space made from temporary materials; the platform brings the street space level with the sidewalk. The construction of parklets to create new outdoor dining spaces became a popular and important tool during the COVID-19 Pandemic for restaurants that otherwise would not have had access to outdoor seating. A platform eliminates the need to provide a ramp to the dining or retail space and can also provide a level surface over a street that may have an uneven surface (cobblestones) or be sloped. The platform used for a parklet also allows the adjacent sidewalk to be an extension of the outdoor dining or retail space, if there is sufficient room.

The disadvantage of parklets is that they can be expensive and challenging for a business to build on its own, as even simple parklets can cost thousands or tens of thousands of dollars when factoring in the expense of design, materials, labor, and permitting. The change in level from the platform to the street requires a continuous barrier and railing around the space and also requires posts at corners to make this platform visible to vehicles. This Toolkit provides the basics for design and construction in Part 2, and any funding resources the municipality can provide will make this process easier for businesses.

The National Association of City Transportation Officials (NACTO) has created a short <u>design guide</u> <u>for parklets</u>, including the critical, recommended, and optional elements to consider. Among the most important things to keep in mind is that parklets must not interfere with the water drainage in the street, and they must be consistent with the state's <u>outdoor dining/seating accessibility</u> <u>requirements</u>. Another useful resource is Parkade's <u>parklet guide</u>, which includes design tips and options, materials options, and suggestions for constructing an affordable parklet.

CRITICAL

To ensure visibility to moving traffic and parking cars, parklets must be buffered using a wheel stop at a desired distance of 4 feet from the parklet. This buffer may also serve as a space for adjacent property owners to accommodate curbside trash collection.

Parklets should have vertical elements that make them visible to traffic, such as flexible posts or bollards.

+ Mare Info

Parklets have a desired minimum width of 6 feet (or the width of the parking lane). Parklets generally entail the conversion of one or more parallel parking spaces or 3–4 angled parking spaces, but may vary according to the site, context, and desired character of the installation. Where a parklet stretches the length of an entire curb, accessibility and sightlines must be taken into account.

+ More Info

The design of a parklet should not inhibit the adequate drainage of stormwater runoff. Small channels between the base and the platform facilitate drainage.

Parklets should have a flush transition at the sidewalk and curb to permit easy access and avoid tripping hazards.

More Info

RECOMMENDED

Parklets should avoid corners and are best placed at least one parking space away from the intersection corner. Where installation of a parklet is under consideration for a site near an intersection, volumes of turning traffic, sightlines, visibility, and daylighting should be taken into account.

Parklets should be heavy enough to make theft impossible or unlikely. Site selection should consider the level of surveillance both during the day and at night.

Incorporate seating into the parklet. Seating may be integrated into the design itself or made possible with moving tables and chairs.

+ More Info

Designs for the sub-structure of a parklet vary and depend on the slope of the street and overall design for the structure. The sub-structure must accommodate the crown of the road and provide a level surface for the parklet. "Bison pedestals" spaced under the surface and of different heights are a common application. Another method is to provide steel sub-structure and angled beams.⁴

+ More Info

Parklets should use a slip-resistant surface to minimize hazards and should be accessible to wheelchair users.

Parklet floor load-bearing weight standards vary by agency. At a minimum, design for 100 pounds per square foot.⁵

Include an open guardrail to define the space. Railings should be no higher than 3 feet and be capable of withstanding at least 200 feet of horizontal force.⁵

Parklet siting should avoid obstructing underground utility access and electrical transformer vaults.

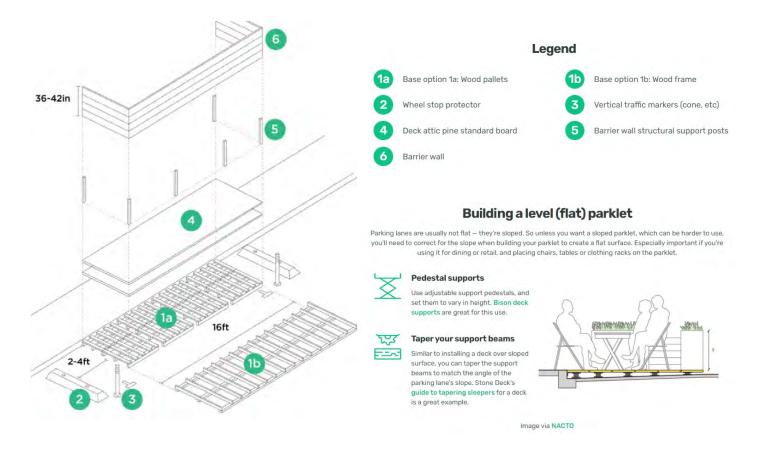
OPTIONAL

The design of any individual parklet may vary according to the wishes of the primary partner or applicant. Designs may include seating, greenery, bicycle racks or other features, but should always strive to become a focal point for the community and a welcoming public gathering place. Cities may opt to have a standard design template to reduce design and construction costs for applicants.

+ More Info

Bicycle parking may be incorporated into or adjacent to the parklet.

Source: NACTO Parklet Design Guidelines. Source: National Association of City Transportation Officials



Parkade's guide includes a diagram of how to construct an affordable wooden parklet. Source: Parkade Complete Guide to Parklet and Streeteries. https://parkade.com/parklet-guide-and-how-to-build-a-parklet.

All in all, the design, permitting, and construction of outdoor dining and retail is expensive. Materials, design drawings, construction, and purchasing tables, chairs and other equipment are not insignificant capital investments. Municipalities and businesses associations can play a role in making parklet construction more affordable (see the next section on bulk purchasing). The state also offers several funding opportunities that municipalities and businesses can take advantage of to support parklet construction, such as:

- **Complete Streets Funding Program**
- **Commonwealth Places**
- **Community One Stop for Growth**
- **Shared Streets and Spaces Program**
- **Massachusetts Growth Capital Grants and Loans**



We are interested in...

FACILITATING BULK PURCHASING OF MATERIALS AND EQUIPMENT TO HELP BUSINESSES.

The costs for buying materials and constructing and maintaining outdoor dining can be prohibitive for a small business. Municipalities may consider instituting a bulk purchase policy for reimbursement by businesses to get better prices and to help assure businesses that equipment such as heaters meet code and requirements. In addition, municipalities can offer delivery, pick-up, and provision of other materials, if desired.

Bulk Purchase Program

This process should start with an in-house assessment of resources and capabilities, as well as mechanisms for repayment of equipment costs by businesses (or grants to cover costs, if applicable). Municipalities should also consider coordinating efforts with multiple businesses through a business association or a Business Improvement District (BID) to investigate the most viable option for a bulk purchasing program. The most feasible items for bulk purchasing include equipment that must meet stringent code or permitting requirements, such as:

- Portable heating equipment
- Fuel (propane) storage equipment
- Outdoor communal storage for inclement weather
- Umbrellas
- Parklet platforms (constructed to building code and available in modular components the size of a standard on-street parking space)

Recommended steps to institute a bulk purchasing program:
□ What are the resources and capabilities of your municipality?
☐ Is there a staff member who can oversee a bulk purchase program?
☐ What department can best do this (DPW, Parks, Planning, Transportation, Facilities)?
☐ What are the mechanisms for payment by the businesses for equipment procured by the municipality? Can this be incorporated into an existing online fee payment structure (used by building department, tax clerk, etc.)?
☐ Can your municipality apply for a grant(s) to cover the cost of the program?
☐ Is there a business association, chamber of commerce, or BID with whom you can partner? Can they take on oversight of the program with collaboration from your municipality?
☐ Take a survey of businesses to assess interest and develop a list of needed furniture and/or equipment that would be good candidates for bulk purchasing.
Get prices for bulk purchase based on the items identified in the business survey.
☐ Arrange for payment for items/payment commitment from businesses

Resources

There are a host of restaurant supply companies that offer a range of heating products. Municipalities interested in bulk purchasing should investigate online sources for outdoor heating equipment and tables/chairs as well as talk to business owners who have made equipment purchases to identify possible bulk purchase options. We also encourage contacting area trade schools and trade unions about contracting for construction of platforms for parklets. Finally, using portable storage pods and placing them in a common area in a remote section of a public parking lot or extra alley space could help solve winter storage of equipment for multiple businesses if outdoor dining is seasonal.



We want to...

CONSIDER CLUSTERED PUBLIC SPACES FOR OUTDOOR DINING

Clustering outdoor dining spaces on public property may be a desirable option. If several businesses along a stretch of commercial area are interested in creating outdoor dining, it may be more space- and cost-effective to coordinate these efforts together. Creating a larger coordinated outdoor dining zone could also be an effective strategy to activate a public space and attract more visitors. Clustered outdoor dining can be operated in two ways: business-managed and municipality-managed.

Business-managed

In this scenario, your municipality would provide a general outdoor dining area that can be used by adjacent restaurants only (this would allow liquor service as per current State regulations).

- Space is used by multiple designated adjacent restaurants. Each restaurant is allocated a specific space.
- Municipality provides overall protective barriers for the entire space, if needed by local regulations.
- Restaurants are responsible for providing tables and chairs and for sectioning off their designated area.
- Cleaning of tables, maintenance, and movement of furniture, if required, is the responsibility of individual restaurants.
- Adjacency of space allows restaurants to serve alcohol.

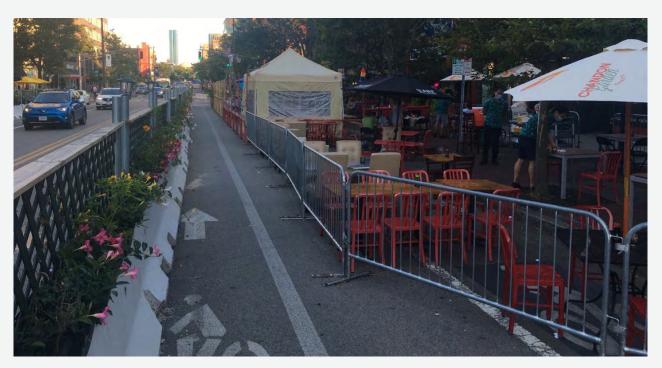


How others are doing it...

Cambridge, MA

The City of Cambridge, MA has provided a number of these larger dining areas in business districts including in Central Square, Harvard Square, Kendall Square, and Inman Square. These **flexible spaces** have offered increased opportunities for outdoor dining where adjacent sidewalk or parking areas aren't available for every business. On a section of Cambridge Street in Inman Square, the City has temporarily closed vehicular traffic in one direction to allow outdoor dining to expand into the street.

From the City of Cambridge website: "At permitted locations across the city, restaurants will be responsible for providing tables and chairs according to social distancing guidelines and sectioning off their outdoor dining areas each day. Due to liquor license requirements and to ensure that the tables are cleaned between each use, these new outdoor dining areas will be designated for use by the adjacent restaurants. Where possible, the outdoor dining areas may be used for loading or parking when they are not being used for dining."



A business-managed outdoor dining cluster in Cambridge's Central Square. Source: CivicMoxie



Northampton, MA

Northampton, MA temporarily closed Strong Avenue in its downtown to implement "Summer on Strong," a collaboration between the City and businesses on the street to offer expanded outdoor seating and musical performances during the summer. Funding for the effort largely came from sponsors, including some local businesses¹.



"Summer on Strong" outdoor dining. Source: Karl Alexander

1: Feldman, Luis. "'A little alfresco': Strong Avenue makeover provides new outdoor dining experience in Northampton." Daily Hampshire Gazette. May 26, 2021. https://www.gazettenet.com/StrongAvenuehg-05252021-40642962.

Municipality-managed

In this scenario, your municipality would provide a general outdoor dining area that can be used by anyone who is bringing their own food or who purchases takeout from a nearby restaurant, similar to a food court.

- Space is used by anyone. There are no allocated spaces for individual restaurants.
- Space can be as small as one table with benches or chairs, or larger.
- Municipality provides overall protective barriers for the entire space, and all tables and chairs.
- Municipality provides overall maintenance and upkeep of space (furniture, signage, major sweeping and trash removal) if needed by local regulations.
 - Table cleaning can be accomplished three ways:
 - 1. Municipality provides cleaning/sanitizer stations
 - 2. Nearby restaurants provide general cleaning (understanding that the space benefits their takeout business)
 - 3. Signage indicating that users of tables are responsible for own cleaning/ sanitizing
- No alcohol is allowed in the space.

It is recommended that your municipality look at an overall plan for providing seating and tables throughout your commercial district to ensure you are making the best use of public space and offering the most support possible to local businesses.



Brookline, MA

During the 2020 COVID-19 shutdown, the Town of Brookline sought opportunities to provide as much seating and table space in the Coolidge Corner commercial district to help businesses that had no adjacent usable public space for outdoor dining and retail or that didn't have the resources for quick buildout of outdoor dining. By identifying all possible locations for different opportunities for resting locations, seating, and eating spots, the Town was able to have a larger plan about which public spaces should be prioritized for seating and dining locations. These spaces were meant to supplement any business efforts to provide outdoor dining.



Source: Town of Brookline and CivicMoxie, LLC.

We are concerned about...

COSTS AND IMPACTS, INCLUDING LOSS OF PUBLIC PARKING AND/OR PARKING **REVENUE, AND NOISE**

There are municipal costs involved in permitting outdoor dining and retail, as well as community benefits. Being clear about the costs and benefits, as well as potential negative impacts, can help your community make educated decisions and tailor an outdoor dining and/or retail program to fit your needs and resources.

Loss of parking spaces

Enabling expanded outdoor dining or retail often involves the conversion of parking, both onstreet and surface lots, into dining and retail spaces. The loss of these spaces is a concern, both for merchants and the customers who frequent these business districts. This concern is especially pertinent if the business area is not easily accessible by walking or public transit, so vehicle trips cannot be replaced. While loss of street parking to parklets can contribute to a parking shortage, this is more likely to result from the conversion of private business parking lots into larger outdoor dining or retail spaces. Without parking alternatives, such as a garage or public lot, an unintended consequence could be the use of nearby residential streets as overflow parking, especially if there are no parking restrictions in those neighborhoods. It is important for planners and those granting permits for outdoor dining and retail to consider the transportation options and capacities of their business areas and neighborhoods when making permitting decisions.

When possible, advance notice of the planned removal of parking spaces should be posted both physically at the parking spaces and online. It is also important to emphasize that decisions to remove parking were made in collaboration with and with the support of the local business community.

Loss of parking revenue

Loss of metered on-street parking or parking spaces in municipal pay lots translates to a loss of revenue for the municipality. Quantifying this expected loss is an important first step in addressing concerns (see example below from Brookline, MA). Support of the entire business district is a public good and benefits residents by helping retain local businesses and services. A robust commercial district also contributes to property tax revenue and the jobs base. The loss of parking revenue is

often more than offset by higher property, meals, and rooms taxes.

However, if a municipality wants to make up expected lost revenue from the conversion of a metered space to a parklet, there are several possible strategies that can be employed:

- Replace lost meters by converting existing free parking spaces to new metered spaces.
- Increase the fees at the remaining parking meters to cover expected losses.
- Charge a fee to the business that will be using the metered space. One way to determine this fee is to calculate the expected lost revenue from the loss of the parking space.
- Implement or increase a **local meals tax** to generate new revenue.

Administrative and material costs

Administering an outdoor dining and retail program takes staff time from a number of departments and costs should be considered for:

- Permit application review
- Assistance to businesses (and staff to aid in streamlined processes)
- Materials such as jersey barriers (cost of materials and delivery/pick-up/re-positioning)

Noise

Another common concern of municipalities about expanded outdoor dining and retail is an increase in ambient noise, particularly in the evening, that disrupts residents. Despite the concern, investigation into this issue suggests that most communities who have implemented temporary outdoor dining have received few noise complaints, if any at all. This is likely because outdoor dining tends to be located in more commercial or dense areas where there are fewer residents, and residents living in those areas are accustomed to ambient noise into the early evening.

Since the most likely source of complaint is disturbance in the later evening, one solution is to set an earlier cut-off for hours of operation for outdoor dining or retail. For example, the Cities of Boston and Haverhill have restricted hours of operation for outdoor dining to 10 PM Sunday through Thursday and 11 PM Friday and Saturday, though restaurants may stay open later than this for indoor dining. If a city or town wishes to set more restrictive hours of operation for businesses in more residential zoning districts, this can be built directly into an outdoor dining or retail ordinance.

Another potential source of noise concern is from outdoor entertainment, such as music or televisions, as this is often louder and travels farther than patron conversations. If this is a major concern in the short-term, one option is to ban outdoor entertainment, as the City of Boston did for their 2021temporary outdoor dining season. However, this is likely not a good solution for communities that are seeking to create permanent outdoor dining regulations. If your municipality has a permitting process for outdoor entertainment licenses, it may be desirable to keep this separate from the outdoor dining or retail permitting process to streamline approval for dining or retail, while maintaining the ability to look more closely at outdoor entertainment on a case-bycase basis.



How others are doing it...

Northampton, MA

One of the lessons learned from the COVID-19 Pandemic is that municipalities, businesses, and residents must be willing to be creative and adapt to new situations. In response to noise complaints from neighbors regarding loud music at one restaurant, the Northampton License Commission voted to add pertinent restrictions to the restaurant's entertainment permit, including ending outdoor performances one hour earlier and banning the use of amplifiers. This solution allowed the restaurant to continue to offer outdoor entertainment while addressing the neighbors' needs.

It is good practice to be explicit in your materials to businesses that they should be considerate of neighbors regarding noise, and to provide information about reporting concerns (noise and otherwise) in a logical and accessible location. For example, the City of Worcester has contact information and instructions for reporting concerns on their **Temporary Outdoor Dining** Program webpage, shown below.

REPORT A CONCERN

Adherence to operating requirements and safety standards is an important component of the Temporary Outdoor Dining Program. To report a concern regarding the operation of a Temporary Outdoor Dining installation, please contact License Commission staff at License@worcesterma.gov.

- · Describe the location, date/time and nature of the compliant.
- Provide your name and contact info (optional, but recommended).



How others are doing it...

Brookline, MA

In its efforts to extend temporary outdoor dining to a permanent zoning bylaw change, the Town of Brookline quantified the estimated costs of the program for a typical outdoor dining space using on-street parking. This information allowed Town Meeting, the Planning Board, Selectboard, and others, to weight the benefits and costs when making decisions.

Estimated Costs

\$ 5,040/\$8,640	7 month/12 month
	Est. parking revenue loss per outdoor seating parking space parklet*
\$ 4,400	Value of 4 concrete jersey barriers (\$1,100.00 each) (applicable only to restaurants with outdoor seating parking space parklets)
\$ 350	Installation and removal of protective concrete jersey barriers (applicable only to restaurants with outdoor seating parking space parklets)
\$ 150	DPW Permit Review, Coordination, Administration, Site visit
\$ 75	Site inspection, ADA Compliance, Safety Inspection
\$ 25	Town Administrator's Office Licensing Administrative Fee
\$10,040-\$13,640	TOTAL ESTIMATED VALUE

^{*}Parking revenue loss estimate assumes that meters in 3 parking spots were fully paid for eight (8) out of twelve (12) hours a day.

Source: Warrant Articles 29 & 30 May 21, 2021 Town Meeting presentation by Meredith Mooney, Economic Development Planner, Town of Brookline Planning and Community Development Department.

We want to...

ENCOURAGE WINTER OUTDOOR DINING

Extending the outdoor dining season can provide significant support for restaurants, enabling them to operate throughout the year. While snow removal on public streets is often cited as the major barrier to winter outdoor dining, there are other considerations as well. Your community should consider the following when deciding how to support winter outdoor dining:

Snow removal

In the case of snow, street plowing and sidewalk clearance are the major concerns in allowing businesses to operate outdoor dining in on-street parking spaces in the winter months. Sidewalk clearance is generally the responsibility of the business. In the case of street plowing and winter weather precautions, there are a few possibilities that you should consider when crafting a policy about all-season dining:

- Allow winter outdoor dining only where there are continuous strips of dining or where there is sufficient gap between dining spaces to allow for plowing.
- Allow winter outdoor dining for all outdoor dining spots and create a system of requirements depending on storm severity:
 - Advisory: light snow (under 1" or 2"), ice, or sleet restaurants may continue operations but must clear sidewalks and hydrants of all snow and ice.
 - Alert: over 2" of snow outdoor dining suspended during storm event. Municipality may require removal of overhead elements including roofs, awnings, etc.

Snow removal need not block outdoor dining options. Some municipalities, including NYC, have smaller snow removal plows and blowers that are used in denser areas that can maneuver between spaces to clear parking and pathways. If you are considering permanent changes in your zoning bylaws to allow outdoor dining, you should consider year-round options and ways your DPW purchases and equipment can accommodate the new "normal." Additional research and insight into the value of protective barriers could also affect snow removal procedures and influence all-season outdoor dining rules; if fewer or no heavy barriers are used in the future, this would make it easier to disassemble outdoor dining materials in advance of heavy snow events.

Furniture and equipment storage

In inclement weather, some equipment and furniture may need to go into storage. For an operating restaurant, storage inside may be impractical. One consideration may be that municipalities provide common storage for restaurants (which may also be needed if no winter outdoor dining is allowed). Purchase and installation of pod-type storage containers for use by area businesses can help solve storage issues. These pods might be placed in public parking areas or other common areas with easy business access.

Heating and comfort

Clarity on heating equipment and where they may or may not be used is important.

Resources needed to "winterize" dining spaces

In addition to the costs for building outdoor dining spaces, businesses face additional expenses to winterize spaces for use all year. Those additional costs include:

- Heaters and fuel/electricity
- Storage for inclement weather

Municipalities might consider grants for businesses to help them winterize their outdoor dining spaces.



How others are doing it...

Boston, MA

The City of Boston created a **Reopen Boston Fund** in the Fall of 2020 to provide financial assistance to restaurants to provide winter outdoor dining. Grants of up to \$3,000 helped restaurants cover the costs of equipment needed for cold weather operations. Businesses were required to provide receipts for purchases of things such as heaters, fuel, and outdoor storage, as well as any additional purchases for winter seating and tables.

Brookline, MA Falmouth, MA

For winter 2020-2021, the Towns of **Brookline** and **Falmouth** launched temporary winter outdoor dining programs that can serve as references

We want to...

ENABLE OUTDOOR DINING IN PARKS

In addition to public sidewalks and streets, outdoor dining can be located in public parks. The process will likely be similar in many ways, although parks typically fall under the jurisdiction of a different department than roadways and require a different permitting process to reserve. If a municipality anticipates a number of requests to use park space for outdoor dining from individual businesses, they may want to coordinate with the parks department to build this option into the streamlined permitting application and review process. If requests to use park space will be minimal or will be restricted to larger efforts coordinated with multiple businesses, it may be simpler to treat these requests on a case-by-case basis. Either way, there are several things that should be considered when planning outdoor dining in public parks:

What are the other uses of the park? If the park is well-used by the community for other purposes, such as by families and children, exercise, or leisure, it is important to determine how much of the park space to preserve and if it is appropriate to use any of the space for outdoor dining.

Are there additional restrictions? A municipality may have stricter local regulations for parks than other public spaces, including alcohol service or live music, that require supplemental policies to allow desired uses.

How should the space be laid out? Dining on the sidewalk or in parking spaces is directly adjacent to transportation facilities, and so must have specific design guidelines to make sure accessibility is not impeded. Accessibility in parks is much less defined, other than not blocking formal pedestrian pathways. Therefore, it may be most useful to use the design guidelines for a full street closure provided in Part 2 when thinking about park spaces.

Is the outdoor dining space itself accessible? Outdoor dining areas in parks must still abide by the state's outdoor dining accessibility regulations, provided at the end of this Toolkit. This includes having an accessible route and a level, flat surface. Because parks are typically grass surfaces, temporary pathways and/or platforms may need to be used to meet accessibility requirements.

Is the park under municipal or state jurisdiction? If the park is under state jurisdiction, use for outdoor dining cannot be permitted through the local permitting system and would have to be done in coordination with the Massachusetts agency responsible for oversight.



How others are doing it...

Needham, MA

The Town of Needham, MA created several outdoor dining spaces on Town-owned property, including the Town Common, for restaurant-goers to enjoy takeout from local restaurants. Needham also adopted a temporary policy allowing to-go alcohol to be consumed in the designated public outdoor spaces.

We want suggestions for...

GAINING PUBLIC AND POLITICAL SUPPORT

Implementing outdoor dining and retail is not just about designing a robust and streamlined program; municipalities need the support of residents and local political leaders to turn proposals into actions, especially if the goal is to make these changes permanent once the State's temporary orders expire. While there will always be opponents, especially surrounding already controversial topics like the removal of parking, there a few positions advocates can focus on to help garner general support.

Outdoor dining has quickly revitalized restaurants and business districts. Outdoor dining was a major financial lifeline for restaurants during shutdowns and the peak of the COVID-19 Pandemic in Massachusetts. There is still much uncertainty surrounding the timeline of the Pandemic and emergence of variants, as well as cautioning from the scientific community about being indoors without face coverings, even for vaccinated individuals. Even when the Pandemic eventually subsides, there is uncertainty about the level of comfort much of the population will have about returning to indoor public settings. Outdoor dining and retail can continue to be a revenue boost for businesses, while removal of outdoor dining could be a large financial burden for those who are currently benefiting from it. Additionally, research has shown that investment in placemaking and public spaces, like outdoor dining or retail zones, indirectly benefits local businesses by increasing foot traffic to the surrounding area.

Outdoor dining has changed the way we think about public spaces. In addition to benefits for businesses, outdoor dining positively activated public spaces during a time when anti-urban and anti-density sentiments were spiking. Activated public spaces generate activity and opportunities for arts and culture that make commercial areas more vibrant, attractive, and economically healthy.

There are strategies for making up lost parking revenue. As discussed above, loss of metered parking revenue may be a concern for some municipalities, but there are strategies to replace much or all of the projected lost revenue. These include raising the price of other free or metered parking spaces, or charging a fee to business utilizing parking spaces, though this may be a less attractive option if the goal is to encourage outdoor dining. The Town of Brookline has also broached the idea of offsetting lost parking revenue with additional meals tax revenue.

Outdoor dining and retail is generally supported by the business community. Perhaps most importantly and influential, outdoor dining programs and process for making implementation easier have largely been supported by the business community. Local businesses play an important role in fostering the culture, activity, and sense of community in downtowns and neighborhoods, and can be influential advocates for outdoor dining and retail.



How others are doing it...

Outdoor dining and retail zones can enhance downtown spaces to attract new visitors and economic activity. Research by the **Brookings Institution** on downtown revitalization and recovery found that investment in public spaces and placemaking supported the development and success of local small businesses. This happens both directly by providing physical spaces for businesses to operate, and indirectly, by increasing foot traffic to the surrounding areas.

We want help...

IDENTIFYING FUNDING FOR IMPLEMENTING A BUSINESS TOOLKIT AND FOR HELPING **BUSINESSES IN OTHER WAYS**

In addition to the funding resources provided above for parklet construction, the Massachusetts Rapid Recovery Plan (RRP) Program has compiled a crowdsourced list of funding resources, many of which are applicable to the implementation of outdoor dining and retail. These include a mix of municipal, for-profit, and non-profit funding opportunities related to the **public** realm, private realm, revenue and sales, and arts and culture, as well as grants that support administrative capacity to help municipalities and non-profits fund the creation and roll-out of their own Toolkit.

Other non-grant strategies include pursuing sponsorship from local businesses and larger companies and collaborating with local non-profits and business associations to conduct community fundraising.



How others are doing it...

New York, NY

Assembly for Chinatown, launched by New York City non-profit Think!Chinatown and design studio A+A+A Studio, is an initiative to build outdoor dining spaces for Chinatown businesses at no cost. Buildouts are 100% funded by donations from individual contributors and organizations, and designs and materials are sourced from local vendors. Artists beautify the spaces with the help of volunteers. As of 2021, they've been able to create nine outdoor dining sites that serve 13 businesses.



Source: Assembly for Chinatown led by Think!Chinatown and A+A+A Studio. Design: A+A+A Studio, Contractor: Chaos Built, Art: Channel Miller, Photography: Trudy Giordano.

We want...

A TEMPLATE FOR OUR OWN COMPLETE **OUTDOOR DINING/RETAIL TOOLKIT**

In Part 2, we provide a suggested Table of Contents for your own community outdoor dining/retail Toolkit and also offer design guidelines to take the guesswork out of the design and construction of spaces and furniture quantities needed.





This Toolkit is primarily intended to be a resource for municipalities in their outdoor dining and retail decision-making and implementation. However, once your municipality designs your outdoor dining or retail program, you may want to assemble the regulations, resources, and instructions specific to your community in a guide for your businesses. This could take the form of a webpage or a community-specific business Toolkit in the form of a downloadable and paper-copy pdf. In this Part 2 of the Toolkit, we provide some resources to help structure such a resource guide for your businesses.

2.1 Suggested Outline for a Toolkit/Resource Guide for **Businesses**

Below is a suggested outline for your resource guide, along with some questions to help you think about how to build it out.

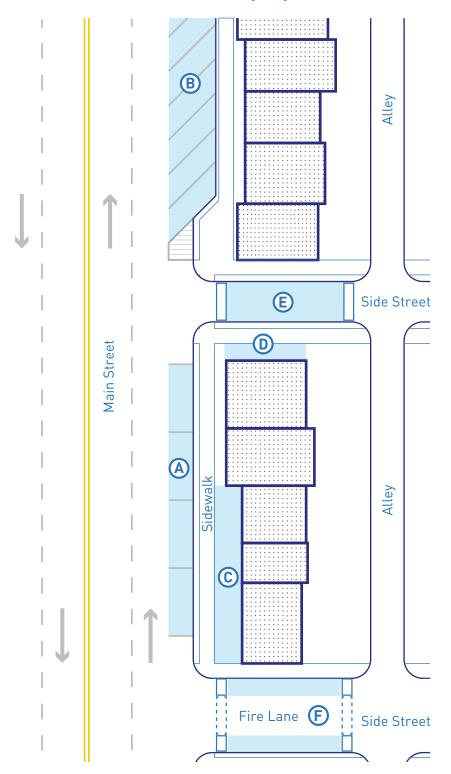
i. Introduction
a. What is the purpose of this resource guide?
b. How will the guide help businesses establish outdoor dining or retail?
ii. Eligibility
a. Who is eligible to apply? Restaurants? Retailers? Others?
iii. Types of outdoor dining or retail permitted
a. Private space?
b. Public space?
c. Curbside uses not allowed?
iv. How to apply
a. Where/how are applications submitted?
b. What steps need to be taken to complete an application?
c. What documents are necessary?
v. Key dates/timeline
a. When does the application open and close? Any intermediary deadlines?
b. When does outdoor dining/retail season begin and end? Or is it year-round?
c. Estimated time for application review and approval?
b. Public space? c. Curbside uses not allowed? iv. How to apply a. Where/how are applications submitted? b. What steps need to be taken to complete an application? c. What documents are necessary? v. Key dates/timeline a. When does the application open and close? Any intermediary deadlines? b. When does outdoor dining/retail season begin and end? Or is it year-round?

	vi. List of additional permits needed
	a. Separate permit needed for tents? Heaters? Entertainment? Others?
	vii. Materials guidance
	a. What will the municipality provide?
	b. What is the business responsible for?
	c. Are there any resources for acquiring materials including municipal bulk purchase programs?
	viii. Accessibility requirements
+	a. What are the minimum state requirements?
	b. Are there any additional accessibility requirements specific to your municipality?
	ix. Site plan/design guidelines for different types of dining/retail spaces
	a. What are sample layouts for the types of outdoor dining or retail permitted in your municipality?
	x. Alcohol guidelines
	a. What are the ABCC requirements?
	b. What does a business need to do to get an extension of premises from your Local Licensing Authority?
	xi. Contact/support available
	a. Who should a business reach out to if they have
	questions or are having difficulty with the application process?
	b. What types of issues can you help a business work through?

2.2 Sample Design Guidelines

The types of outdoor dining and retail offered will vary from community to community, depending on street layouts, space availability and requirements, other individual regulations. Below are a number of potential design scenarios; municipalities may take relevant scenarios to include in their resources to the businesses in their community.

Site Selection and Set up Options



TRAFFIC SPEED NOTICE

It is advised that outdoor dining in parking spaces and roadways be implemented only on streets with speeds under 25-30mph.

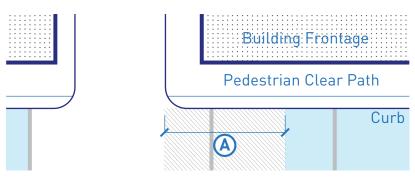
PATIO EXTENT

Proposed patio spaces should not extend beyond the host frontage / lateral property line without written permission from neighboring business except for multi-business shared parklets and street plazas.

CONVERTIBLE SPACES:

- (A) Parallel Parklet
- **Angled Parklet**
- C Large Sidewalk Patio
- Small Sidewalk Patio
- **(E)** Full Closure Street Plaza
- **Street Plaza with Fire Lane**

Site Selection and Set up Options



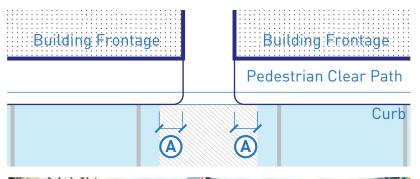


Brookline, MA

CORNER

(A) Corner setback:

On-street dining areas should be setback from intersection corners and stop signs by 20ft or one parking spot.





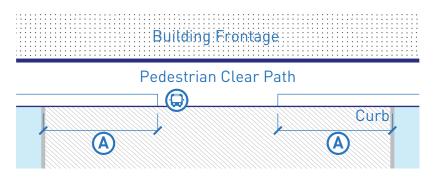
Cambridge, MA

ACTIVE DRIVEWAY AND CURB CUT

A Driveway setback:

On-street dining areas should be setback from active driveways and curb cuts by 2ft.

Safety and Access Setbacks





Brookline, MA

Building Frontage Pedestrian Clear Path Curb



Brookline, MA

BUS STOP

(A) Bus Stop setback:

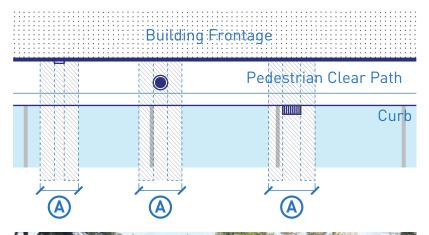
On-street dining areas should be setback from active bus stops and other similar public transportation access points by 15ft on both sides.

FIRE HYDRANT

(A) Fire Hydrant setback:

On-street dining areas should be setback from fire hydrants by 5ft to 15ft depending on local fire code.

Safety and Access Setbacks



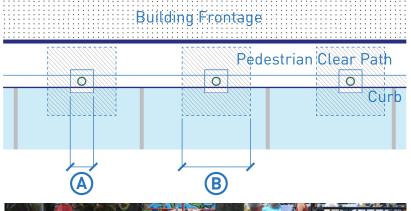


Brookline, MA

UTILITIES ACCESS POINTS

(A) Utilities setback:

All outdoor dining areas should be setback from utility access points and connections by 2ft on both sides to allow unobstructed access from the street.





Cambridge, MA

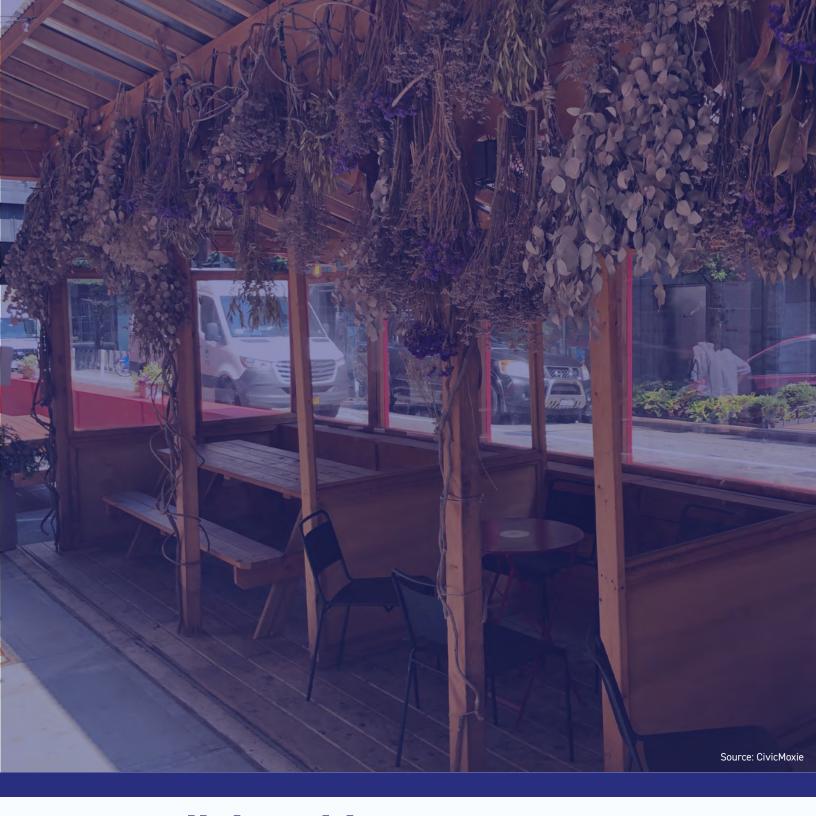
TREES AND STREET LIGHTING

A Tree and Street Lighting setback:

All outdoor dining and retail areas should be setback from trees and street lighting by 1ft-2ft on all sides.

(B) Tree buffer for heating elements:

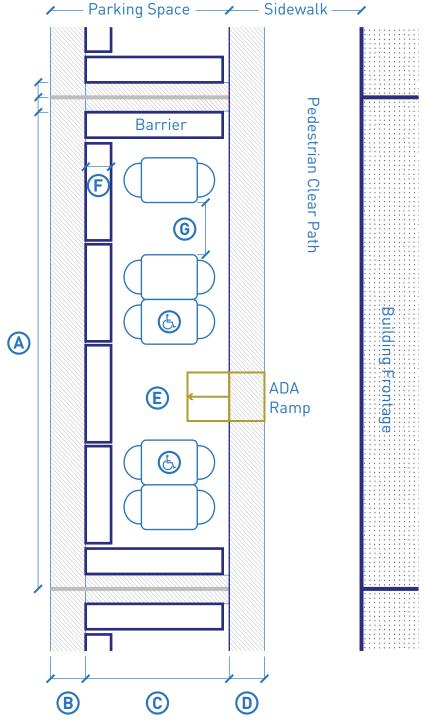
A separate 5ft buffer applies to outdoor heating elements such as heaters and open flames (such as candles), if such elements are approved.



A. Parallel Parklet

Typical Parallel Parklet Layout (Dining)

Parklets can occupy one or more parking spots. Parklet width on the sidewalk edge should not exceed the lateral property line of the host business without permission.



A Typical Parklet Size

A typical parallel parklet size is about 8ft x 22ft.

(B) Roadside Buffer

Buffer (Oft - 2ft) between outdoor dining areas and adjacent roadways and/or bicycle lanes for safety.

Parklet Width

Parklet width is typically 6ft - 8 ft. The parklet should not exceed the width of the parking space.

Pedestrian Path Buffer

Buffer (0.5ft - 4ft) between Parklet and Pedestrian Clear Path

(E) ADA Access

Where the parklet is not level with the sidewalk, an ADA Ramp (width 3ft - 5ft and maximum slope of 1:12) is required.

(F) Separation Barrier

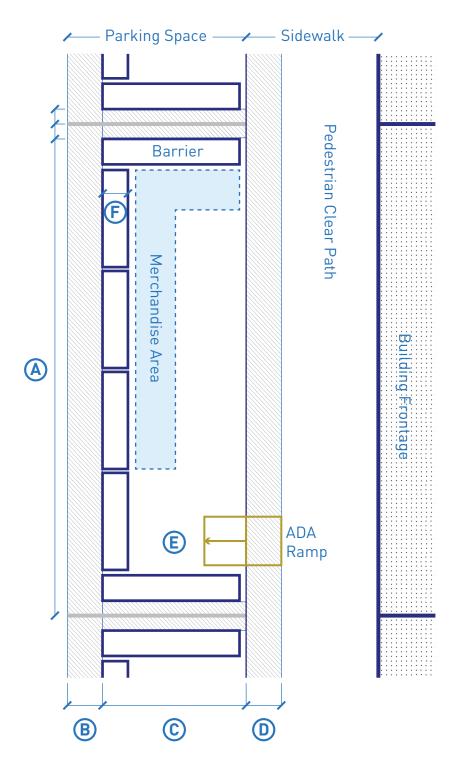
Non-protective separation barriers 12in - 18in wide.

(G) Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft - 3ft of separation or follow local guidelines.

Typical Parallel Parklet Layout (Retail)

Parklets can occupy one or more parking spots. Parklet width on the sidewalk edge should not to exceed the lateral property line of the host business without permission.



(A) Typical Parklet Size

A typical parallel parklet size is about 8ft x 22ft.

B Roadside Buffer

Buffer (Oft - 2ft) between outdoor dining areas and adjacent roadways and/or bicycle lanes for safety.

(c) Parklet Width

Parklet width is typically 6ft - 8 ft. The parklet should not exceed the width of the parking space.

Pedestrian Path Buffer

Buffer (0.5ft - 4ft) between Parklet and Pedestrian Clear Path.

(E) ADA Access

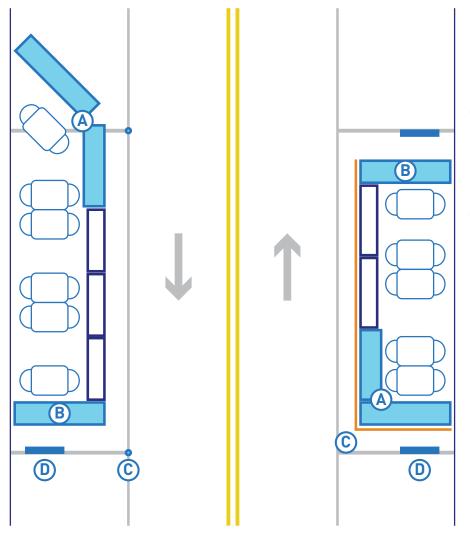
Where the parklet is not level with the sidewalk, an ADA Ramp (width 3ft - 5ft and a maximum) slope of 1:12) is required.

(F) Separation Barrier

Non-protective separation barriers 12in - 18in wide.

Protective Barriers and Equipment

Below are examples of different protective barriers equipment that can be used for parklets. Requirements for protective barriers will vary by municipality.



(A) Front Protective Barriers

A protective barrier at the traffic facing corner if adjacent to an active parking spot.

B Back Protective Barriers

A protective barrier at the end of the parklet if adjacent to an active parking spot.

C Reflective Surface

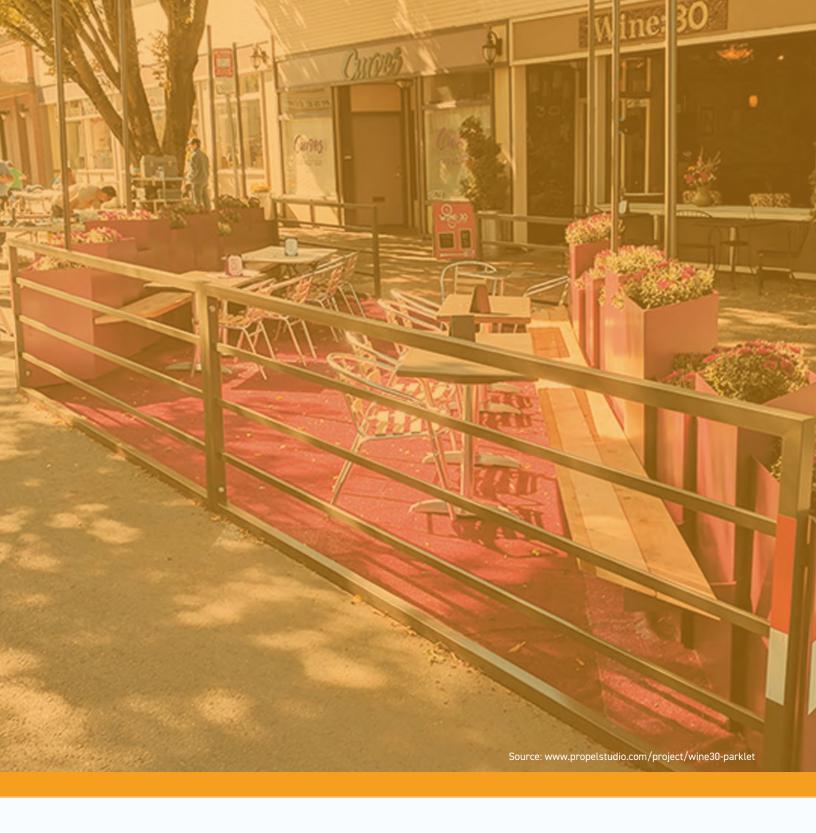
A safe-hit post at the corner or reflective tape on the barrier on traffic facing edge.

Wheel Stop

Wheel stops if adjacent to an active parking spot.



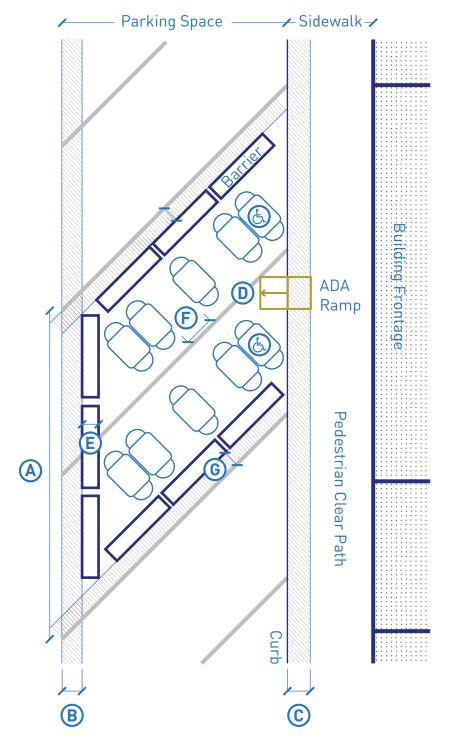
Brookline, MA



B. Angled Parklet

Typical Angled Parklet Layout (Dining)

Angled parklets typically occupy two or more parking spots. Parklet width on the sidewalk edge should not exceed the lateral property line of the host business without permission.



(A) Typical Angled Parklet Size

A typical angled parklet size varies depending on angle and depth. However, using two or more spots is recommended for material efficiency.

(B) Roadside Buffer

Buffer (Oft - 2ft) between outdoor dining areas and adjacent roadways and/or bicycle lanes for safety.

(C) Pedestrian Path Buffer

Buffer (0.5ft - 4ft) between Parklet and Pedestrian Clear Path.

(D) ADA Access

Where the parklet is not level with the sidewalk, an ADA Ramp (width 3ft - 5ft and maximum slope of 1:12) is required.

(E) Separation Barrier

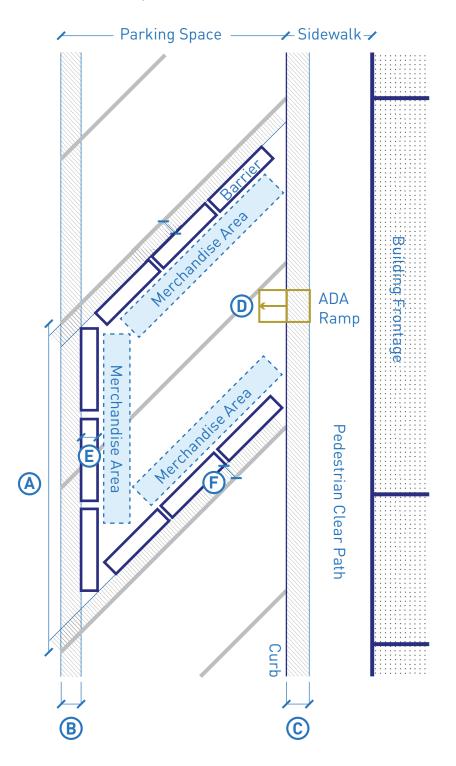
Non-protective separation barriers 12in - 18in wide.

(F) Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft -3ft of separation or follow local guidelines.

Typical Angled Parklet Layout (Retail)

Parklets can occupy two or more parking spots. Parklet width on the sidewalk edge should not exceed the lateral property line of the host business without permission.



Typical Angled Parklet Size

A typical angled parklet size varies depending on angle and depth. However, using two or more spots is recommended for material efficiency.

B Roadside Buffer

Buffer (Oft - 2ft) between outdoor dining areas and adjacent roadways and/or bicycle lanes for safety.

© Pedestrian Path Buffer

Buffer (0.5ft - 4ft) between Parklet and Pedestrian Clear Path.

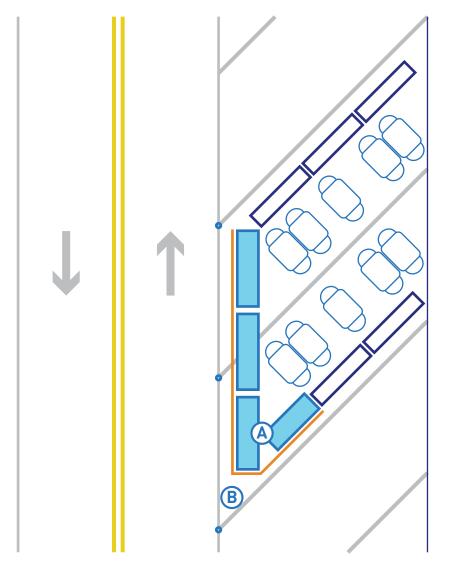
(D) ADA Access

Where the parklet is not level with the sidewalk, an ADA Ramp (width 3ft - 5ft and maximum slope of 1:12) is required.

(E) Separation Barrier

Non-protective separation barriers 12in - 18in wide.

Typical Angled Parklet Barrier and Safety.



(A) Front Protective Barriers

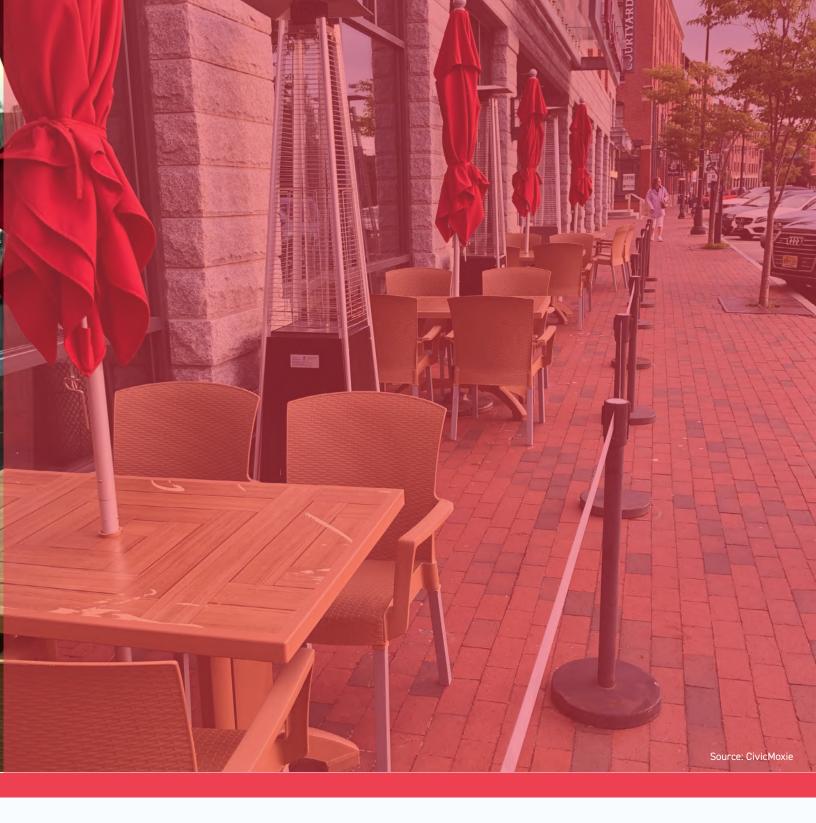
A protective barrier at the traffic facing corner if adjacent to an active parking spot.

B Reflective Surface

A safe-hit post at the corner or reflective tape on the barrier on traffic facing edge.



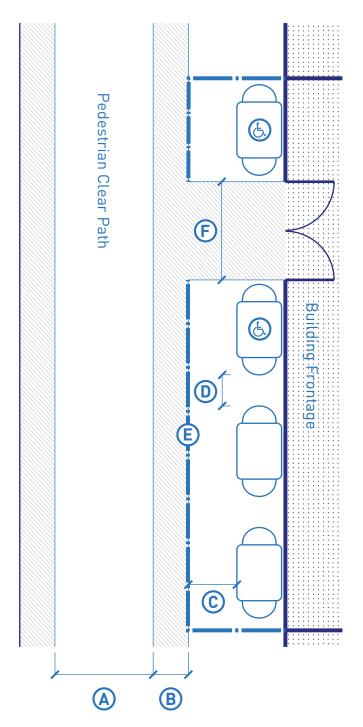
Walla Walla, WA



C. Large Sidewalk Patio

Typical Large Sidewalk Patio Layout (Contiguous)

Large sidewalk patio width should not exceed the lateral property line of the host business without permission.



(A) Pedestrian Clear Path

Sidewalk patio feasibility is contingent on the preservation of a Pedestrian Clear Path of 5ft - 10ft depending on districts and visitor volume.

(B) Pedestrian Path Buffer

Buffer (2ft) between Patio and Pedestrian Clear Path.

C Service and Access

Provide a clear path 2ft - 3ft depending on accessibility requirements for service and access. If sufficient dedicated accessible tables are available near entrance. path need not be accessible.

(D) Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft - 3ft of separation or follow local guidelines.

(E) Verticle Separation and Boundary

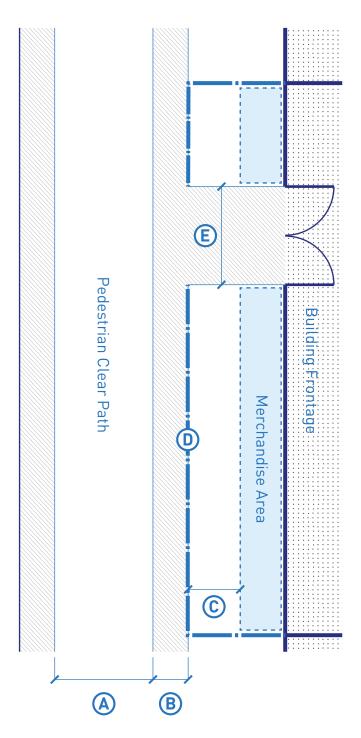
A clearly indicated enclosure in the form of a fence, or cordoned area allows for the service of alcohol.

(F) Entrance Clear Path

Entrance to the premises must not be obstructed by enclosures, tables, seating, or patrons.

Typical Large Sidewalk Patio Layout (Retail)

Large sidewalk patio width should not to exceed the lateral property line of the host business without permission.



Pedestrian Clear Path

Sidewalk patio feasibility is contingent on the preservation of a Pedestrian Clear Path of 5ft - 10ft depending on districts and visitor volume.

(B) Pedestrian Path Buffer

Buffer (2ft) between Patio and Pedestrian Clear Path.

Service and Access

Provide a clear path 2ft - 3ft © depending on accessibility requirements for service and access.

Verticle Separation and Boundary

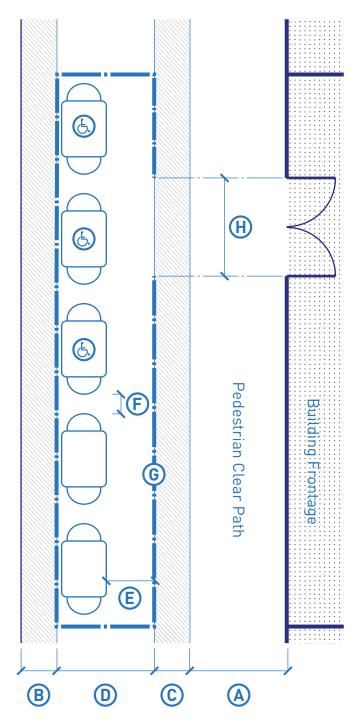
A clearly indicated enclosure in the form of a fence, or cordoned area.

Entrance Clear Path

Entrance to the premises must **(E)** not be obstructed by enclosures, merchandise, or patrons.

Typical Large Sidewalk Patio Layout (Non-Contiguous)

Large sidewalk patio width should not exceed the lateral property line of the host business without permission.



A Pedestrian Clear Path

Sidewalk patio feasibility is contingent on the preservation of a Pedestrian Clear Path of 5ft - 10ft depending on districts and visitor volume.

(B) Roadside Buffer

Provide an 18in buffer between curb and sidewalk dining area.

Pedestrian Path Buffer

Buffer (2ft) between Patio and Pedestrian Clear Path

Width

D Non-contiguous large sidewalk patio width contingent on providing a service and access path per E. Service and Access.

Service and Access

E Provide a clear path 2ft - 3ft depending on accessibility requirements for service and access. If sufficient dedicated accessible tables are available near entrance, path need not be accessible.

Table Separation

(F) Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide1.5ft - 3ft of separation or follow local guidelines.

Verticle Separation and Boundary

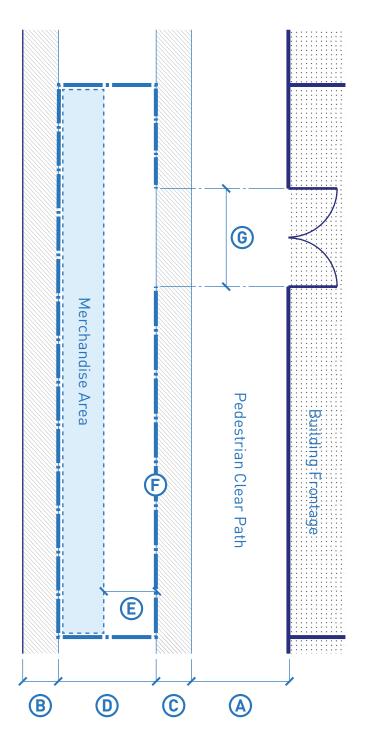
A clearly indicated enclosure in the form of a fence, or cordoned area, allows for the service of alcohol.

Entrance Clear Path

Entrance to the premises must not be obstructed by enclosures, tables, seating, or patrons.

Typical Large Sidewalk Patio Layout (Retail)

Large sidewalk patio width should not exceed the lateral property line of the host business without permission.



(A) Pedestrian Clear Path

Sidewalk patio feasibility is contingent on the preservation of a Pedestrian Clear Path of 5ft - 10ft depending on districts and visitor volume.

(B) Roadside Buffer

Provide an 18in buffer between curb and sidewalk dining area.

© Pedestrian Path Buffer

Buffer (2ft) between Patio and Pedestrian Clear Path.

Width

Non-contiguous large sidewalk patio width contingent on providing a service and access path per E. Service and Access.

Service and Access

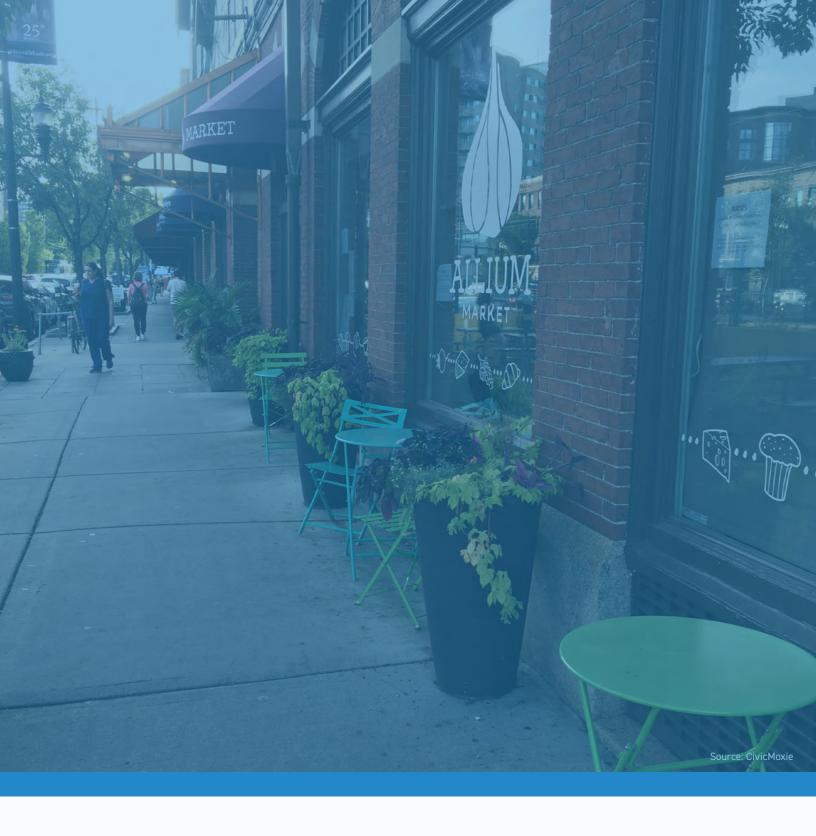
Provide a clear path 2ft - 3ft (E) depending on accessibility requirements for service and access.

Verticle Separation and Boundary

A clearly indicated enclosure in the form of a fence, or cordoned area.

Entrance Clear Path

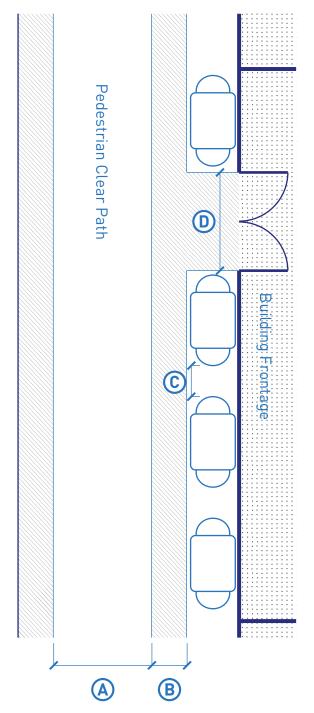
Entrance to the premises must not be obstructed by enclosures, tables, seating, or patrons.



D. Small Sidewalk Patio

Typical Small Sidewalk Patio Layout

Small sidewalk patio width should not exceed the lateral property line of the host business without permission.



(A) Pedestrian Clear Path

Sidewalk patio feasibility is contingent on the preservation of a Pedestrian Clear Path of 5ft - 10ft depending on districts and visitor volume.

(B) Pedestrian Path Buffer

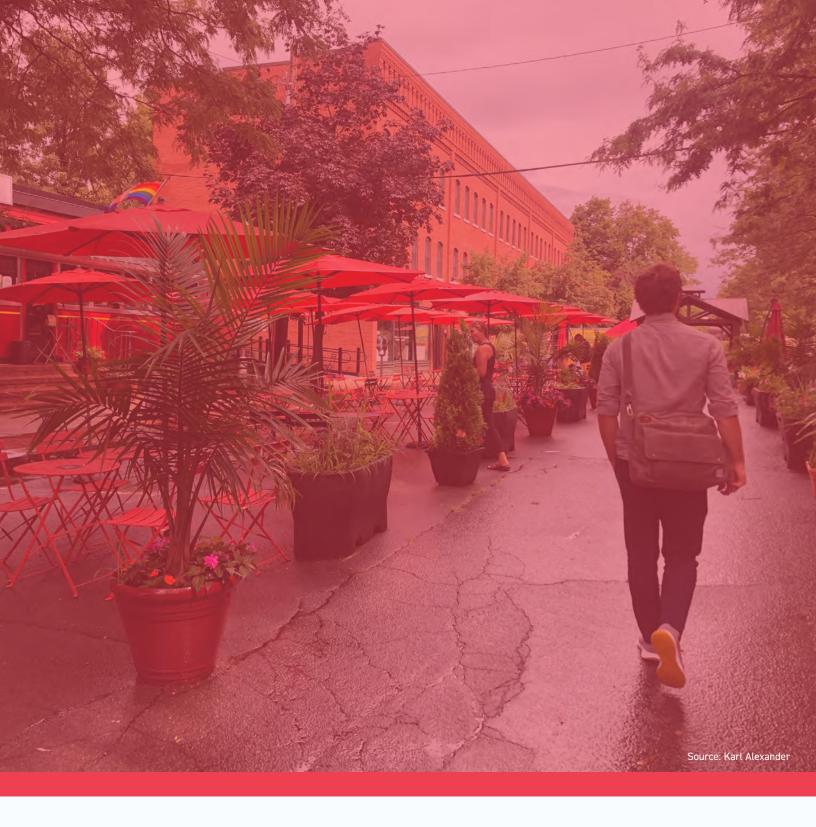
Buffer (2ft) between Patio and Pedestrian Clear Path to accommodate moving patrons, chairs, and services.

(C) Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft -3ft of separation or follow local quidelines.

Entrance Clear Path

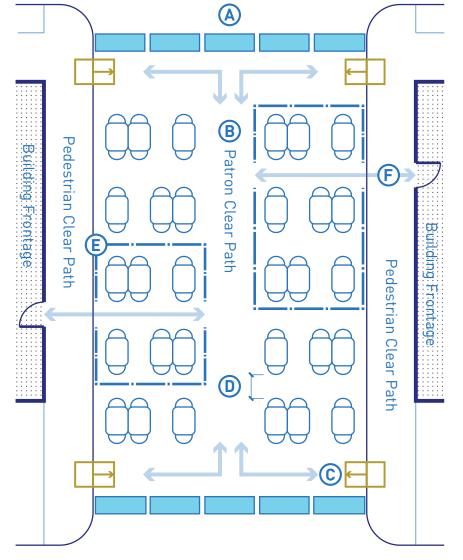
D Entrance to the premises must not be obstructed by enclosures, tables, seating, or patrons.



E. Full Closure Street Plaza

Typical Full Closure Street Plaza

Street Plaza outdoor seating may be hosted by individual businesses or shared amongst multiple participating businesses.



A Barriers

Protective barriers (filled with sand or water, or as directed by local quidelines) should be placed in front of the outdoor dining plaza on both ends. Suggested barrier width: 12in - 18in

(B) **Pedestrian Clear Path**

Provide a Pedestrian Clear Path of 5ft - 10ft depending on visitor volume.

(C)**ADA Access**

Provide an ADA Ramp (width 3ft - 5ft) on both sides of the plaza unless existing curb cuts into designated dining area are available.

Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft -3ft of separation or follow local guidelines.

(E) Hosted Outdoor Dining Area

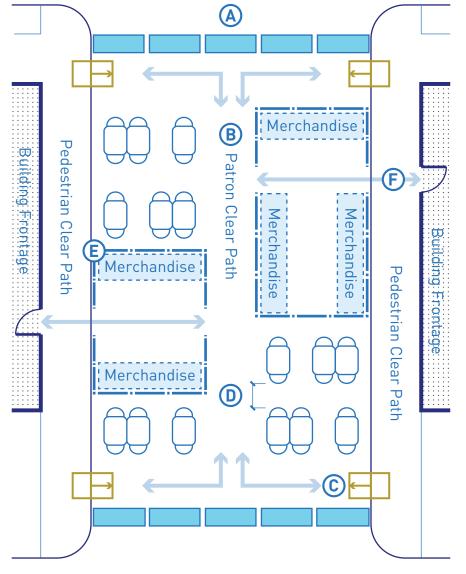
Certain areas may be privately hosted by adjacent businesses and reserved for their patrons. These areas must be clearly indicated and separated with verticle separators such as fences and cordons.

(F) Service and Access

A direct, straight service path should be provided between the host business and outdoor dining area. An additional access should be provided at road level for patrons requiring wheel chair access.

Typical Full Closure Street Plaza

Street Plaza outdoor seating may be hosted by individual businesses or shared amongst multiple participating businesses.



(A) Barriers

Protective barriers (filled with sand or water, or as directed by local guidelines) should be placed in front of outdoor retail plaza on both ends.

Suggested barrier width: 12in -18in

(B) Pedestrian Clear Path

Provide a Pedestrian Clear Path of 5ft - 10ft depending on visitor volume.

(C) ADA Access

Provide an ADA Ramp (width 3ft - 5ft) on both sides of the plaza unless existing curb cuts into designated retail area are available.

Table Separation

Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft -3ft of separation or follow local guidelines.

(E) Hosted Outdoor Retail Area

Certain areas may be privately hosted by adjacent businesses and reserved for their patrons. These areas must be clearly indicated and separated with verticle separators such as fences and cordons.

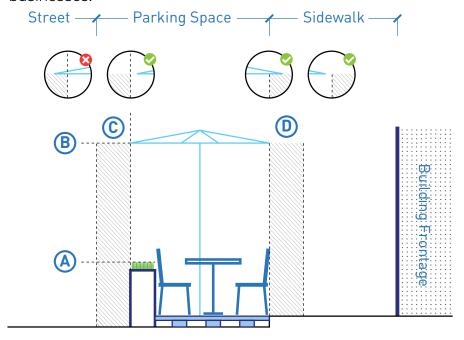
(F) Service and Access

A direct, straight service path be provided between the host business and outdoor retail area.

An additional access should be provided at road level for patrons requiring wheel chair access.

Typical Full Closure Street Plaza

Street Plaza outdoor seating may be hosted by individual businesses or shared amongst multiple participating businesses.



(A) Barriers

Barriers and vegetation should be limited to a total height of 36".

B Overhead Clearance

Provide a min. 7ft - 8ft clearance of overhead coverings, including umbrellas, trellises etc.

© Roadside Clearance

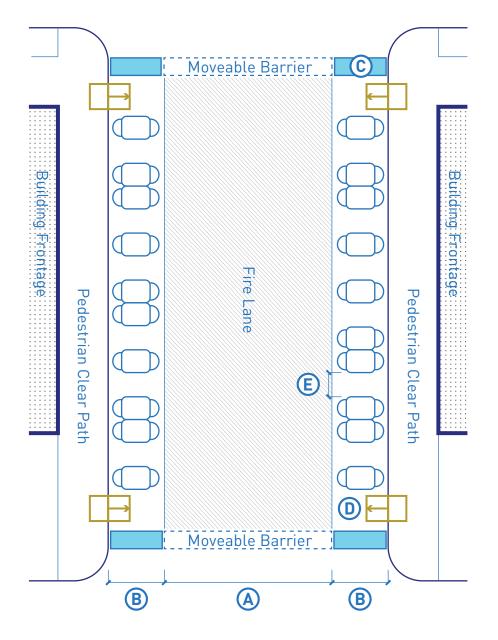
Overhead coverings may not extend beyond the barriers into the road.

Sidewalk Clearance

Overhead coverings may extend beyond the barriers into the sidewalk, providing the overhead clearance of 7ft - 8ft is maintained.

Typical Partial Closure Street Plaza with Fire Lane

Street Plaza outdoor seating may be hosted by individual businesses or shared amongst multiple participating businesses.



(A) Fire Lane

Partial closure plazas must maintain a 20ft clear emergency fire lane.

(B) Outdoor Dining Area Width

Remaining area (approx. 3ft - 5ft on both sides on a twolane road) may host outdoor dining set ups that may not enter into the fire lane. Set up may spill over onto sidewalk given that a Pedestrian Clear Path of 5ft - 10ft be maintained.

(C) Barriers

Protective barriers (filled with sand or water, or as directed by local guidelines) should be placed in front of the outdoor dining strip on both ends.

Moveable barriers to block off Fire Lane, to be removed as necessary.

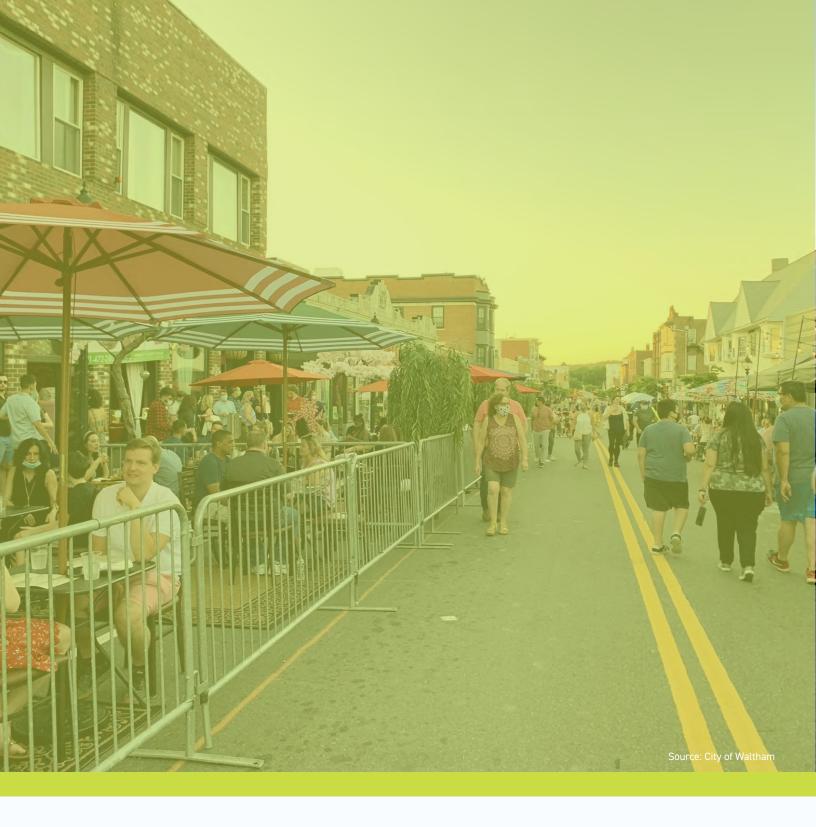
Suggested barrier width: 12in - 18in

(D) ADA Access

Provide an ADA Ramp (width 3ft - 5ft) on both sides of the plaza unless existing curb cuts into designated dining area are available.

(E) Table Separation

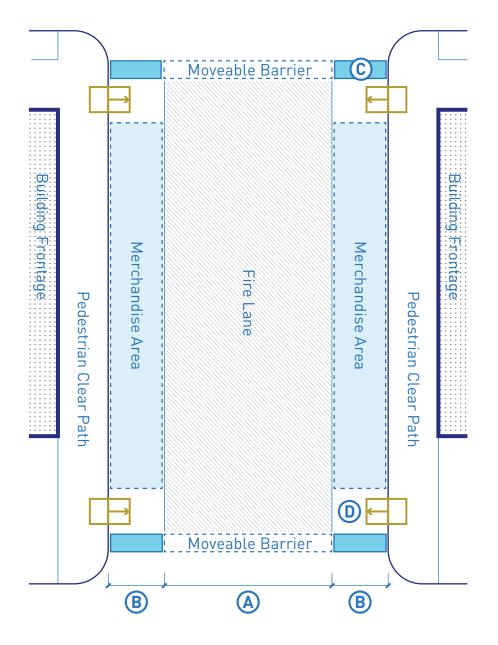
Under COVID-19 guidelines, diners at different tables should be spaced at least 6ft apart. Under normal operation, provide 1.5ft - 3ft of separation or follow local quidelines.



F. Street Plaza with a Fire Lane

Typical Partial Closure Street Plaza with Fire Lane

Street Plaza outdoor seating may be hosted by individual businesses or shared amongst multiple participating businesses.



(A) Fire Lane

Partial closure plazas must maintain a 20ft clear emergency fire lane.

Outdoor Merchandise Area Width

Remaining area (approx. 3ft - 5ft on both sides on a two-lane road) may host outdoor retail set ups that may not enter into the fire lane. Set up may spill over onto sidewalk given that a Pedestrian Clear Path of 5ft - 10ft be maintained.

(C) Barriers

Protective barriers (filled with sand or water, or as directed by local quidelines) should be placed in front of outdoor retail strip on both ends.

Moveable barriers to block off Fire Lane, to be removed as necessary.

Suggested barrier width: 12in - 18in

(D) ADA Access

Provide an ADA Ramp (width 3ft - 5ft) on both sides of the plaza unless existing curb cuts into designated retail area are available.

2.3 State Outdoor Dining/Seating Fact Sheet for **Accessibility Requirements**

On the following pages are the minimum accessibility requirements for outdoor dining as designated by the Commonwealth of Massachusetts. They can also serve as guidance for minimum space requirements for outdoor retail. This document can be shared with businesses or used as a resource for designing accessibility documentation for your municipality. While these are the minimum requirements, some municipalities may have additional local accessibility requirements, which should also be made explicit in your materials to businesses.



OUTDOOR DINING/SEATING

FACT SHEET FOR ACCESSIBILITY CONSIDERATIONS (COVID-19 EDITION)

The primary focus of this guidance is to provide eating establishments with an understanding of the requirements of the rules and regulations of the Massachusetts Architectural Access Board (MAAB), Massachusetts' state building code 521 CMR, that addresses architectural accessibility in the built environment. It will also reference anti-discrimination obligations under the Americans with Disabilities Act (ADA) and its associated Architectural Design Standards (ADADS).

As Massachusetts begins to re-open and restaurants and cafes are establishing outdoor seating areas for customers, entities must consider accessibility obligations that ensure a safe, equitable, and accessible experience for all visitors.

Accessible Route

An accessible route must be provided on site that coincides with the route the general public uses from arrival destination points to the receiving area such as the host station. An accessible route must also connect to accessible seating, restrooms/portable toilets, and to other unique amenities such as a bar, firepit, fans, or heat lamps. The additional listed amenities may also have their own obligations.

Components of an Accessible Route

Width of the Accessible Route:

The minimum width of an accessible route is 36 inches (MAAB 20.4). The use of separation devices such as, bollards, cones, planters, chairs, or chains attached to stands intended to delineate the dining area must not be placed in a way that reduces the width of the accessible route.

Surface:

The surface of the accessible route must provide a running slope measuring between 0%-5% to remain a walkway. If the slope reaches 5.1% the route will be classified as a ramp and be required to stay under 8.33% (MAAB 20.9). The surface must also be stable, firm, slip resistant (MAAB 20.9), free from changes in level exceeding ½ inch and unbeveled (MAAB 29.2), and free from protruding objects that extend into the accessible route (MAAB 20.6).

Please Note

If you would like to increase the level of accessibility being provided along an accessible route, we suggest increasing the width to 48 inches, allowing for additional maneuvering space.

Additionally, although landscaping is commonly used to be aesthetically pleasing, grass is not considered an accessible route under the regulations. Surfaces such as rocks, sand, and loose gravel are similarly not considered accessible. Businesses are welcome to include these surfaces on their property; however, these must not be used on the accessible route.



Accessible Tables and Seating

As restaurant seating is added or created compliance with MAAB Section 17.0 is required. Routes to all dining areas must be accessible, including outdoor seating areas (MAAB 17.5). A specific number of accessible seating must be provided on an accessible route, must be distributed based on size and location, and must follow detailed dimensions regarding clear floor space and table and counter heights.

Components of Accessible Tables and Seating

Seating:

At least 5%, but not less than one of the tables provided shall be accessible and be on an accessible route (MAAB Section 17.2). Seating at the accessible tables must be movable and not be fixed to the table like a picnic bench or school cafeteria table (MAAB Section 35.1).

Example:

A restaurant provides 45 tables outside in a park and are all similar in their location and seating capacity. Two tables, out of the 45 would need to be accessible and located along an accessible route.

Distribution:

Accessible tables must be distributed by the size and locations of the space being offered. Tables that are provided for large or small groups, in different locations, or for different services would all be required to meet the 5% obligation (MAAB Section 17.2).

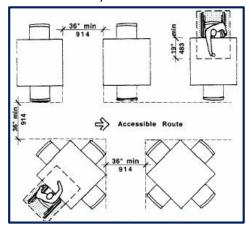
Example:

A restaurant has 62 tables. 10 of the tables offer light dining on the sidewalk while the remaining 52 tables are reserved for fine dining and are located on a closed street. In this scenario, 3 accessible tables would need to be provided. One accessible table would be in the light dining area and one accessible table would need to be provided in the fine dining area. The third accessible table could be provided in either area.

Remember, in this scenario someone may need to transition from the sidewalk to the street, so ensuring the accessible route is critical.

Accessible Aisle Between Accessible Tables:

A 36-inch clearance (access aisle) is required between accessible tables. No seating or any other obstruction shall overlap the access aisle. (MAAB Section 17.2.2).



Clear Floor Space at Accessible Tables:

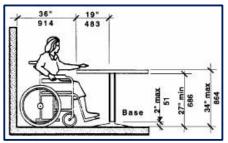
At each accessible table, a clear floor space measuring 36-inches by 48-inches should be provided to allow for an individual to easily set themselves at the table. This space should not overlap with the knee space depth under the table by more than 19-inches (MAAB Section 17.2.3). See graphic below.

Knee Clearances at Accessible Tables:

Knee space of at least 27-inches high, 30-inches wide, and 19-inches deep must be provided to allow for an individual using a mobility device to maneuver and use the table (MAAB Section 17.2.4).

Height of Tables and Counters:

The tops of the accessible tables shall be from 28-inches to 34-inches above the floor or ground (MAAB Section 17.2.5).



Note on Accessible Routes and Utilizing Parklets or On-Street Parking for Dining:

If a restaurant decides to offer outdoor dining using a parklet or on-street parking space, it is important to note that all of the aforementioned laws and regulations continue to apply even though technically the parklet may be in the vehicular lane. Parklets tend to be the size of an on-street parking space and often do not provide sufficient clear width between seating areas and the barrier that protects customers from vehicles. Since these types of areas are typically located on the street, consider how a customer with a disability can access the street from the curb. If no curb cut is provided, it could be extremely difficult for one to get to that location without a mechanism to either reduce or eliminate the change in level. Often businesses will use a temporary or portable ramp; however, in order to use such device, the building owner must apply for and be granted a variance from the MAAB. One cannot install a portable and/or temporary ramp without seeking permission from the MAAB. Since these types of spaces can quickly become a complicated subject, we strongly suggest reaching out to our office directly if you have additional questions or concerns regarding the use of parklets or on-street parking spaces.

Other Access Considerations

There are additional "dining" requirements under the MAAB that involve dining counters without service, counters and bars with service, and food service lines. These additional requirements can be found under MAAB Section 17 -Restaurants.

- If outdoor dining is occurring on a sidewalk, a 36-inch path of travel is required to allow for pedestrians to pass by or access an entrance.
- If portable toilets are provided in multiple locations on the same site, an accessible portable toilet (5%, but not less than 1) should be provided in each location. If portable toilets are all provided in one single location, the 5%, but not less than 1 must be provided (MAAB 30.1.2).
- If parking is affected by the provision of outdoor dining, it is important to remember that accessible parking is based on the number of parking spaces within a particular parking lot. If all parking is removed entirely then there would be no requirement to provide accessible parking. If parking is reduced, modified, or re-located there would be an obligation to provide the appropriate number of accessible parking spaces as required (ADADS 208.2 and/or MAAB 23.2.1).
- Ensure the accessible route is free from Protruding Objects, such as lights, umbrellas, signs, or other fixtures provided (MAAB 20.6)

If any of the above requirements cannot be met as prescribed by the MAAB rules and regulations, a variance would be required from the MAAB. Further information related to that process can be found on the Massachusetts Architectural Access Board's website¹.

¹ https://www.mass.gov/orgs/architectural-access-board

Effective Communication

The Americans with Disabilities Act requires businesses that are open to the public, such as eating establishments, to communicate effectively with people who have vision, hearing, or speech disabilities to ensure that they can communicate with, receive information from, and convey information to the business.

A business is obligated to provide auxiliary aids and services when necessary to communicate with a person with a disability unless doing so would create an undue burden, which is defined as significant difficulty or expense.

Examples of Auxiliary Aids and Services at a Restaurant:

- Providing a menu in Braille or large print
- Reading menu items to a customer
- Communicating with pen and paper
 - Speaking slowly and clearly

We hope you find this fact sheet a useful tool as dining re-opens in Massachusetts. If there are any questions related to this fact sheet, please contact MOD by reaching out to MOD's Community Services Unit by email at either Jeff.Dougan@mass.gov or Jakira.Rogers@mass.gov, or by phone at 617-979-7316.



Massachusetts Office on Disability One Ashburton Place, Room 1305 **Boston, MA 02108**

Contact MOD

Phone: 617-727-7440

Toll Free: 800-322-2020

Fax: 617-727-0965

Send MOD a Question Online²

Visit MOD on the Web3

Twitter: @MassDisability4

Blog: blog.mass.gov/mod⁵

YouTube⁶

² https://www.mass.gov/forms/contact-the-massachusetts-office-on-disability

³ http://www.mass.gov/mod

⁴ https://twitter.com/massdisability

⁵ https://blog.mass.gov/mod

⁶ https://www.youtube.com/channel/UCoS5kUnBGto7NW-pK24MrDg/

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HOME

STARTU

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BLOG





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 190 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

Dr. Lomax R. Campbell, MBA, PMP®, LSSBB President & CEO, Third Eye Network, LLC 585-877-MGMT (6468) | lomax@thirdeye.network

Location

Rochester, New York/Finger Lakes Region

Origin

Budget

Timeframe

Risk

Key Performance Indicators

Partners & Resources

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



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



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



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

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)

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)

Entrepreneurial Ecosystem Solutions

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 womenowned 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) 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

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

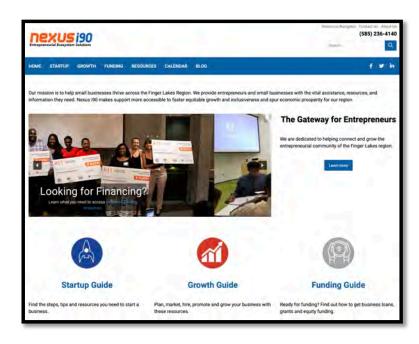
- Determine the scope of work based on community needs (Rochester was interested in expanding access to SourceLink's CRM so any resource partner in the region that wanted to adopt the platform as a system of record or integrate their organizational system with the shared platform); allot 12 months of 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



Campbell's Nested "Hub and Spoke" Model for Inclusive Ecosystem Building and Enhancement

Action - Facilitating Nested "Hub and Spoke" Model Development

- 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



Nexusi90.org home page

NEXUS 190 Entrepreneurial Ecosystem Solutions

Entrepreneurial Ecosystem Solution

Process - Resource Partner Enhancement Program

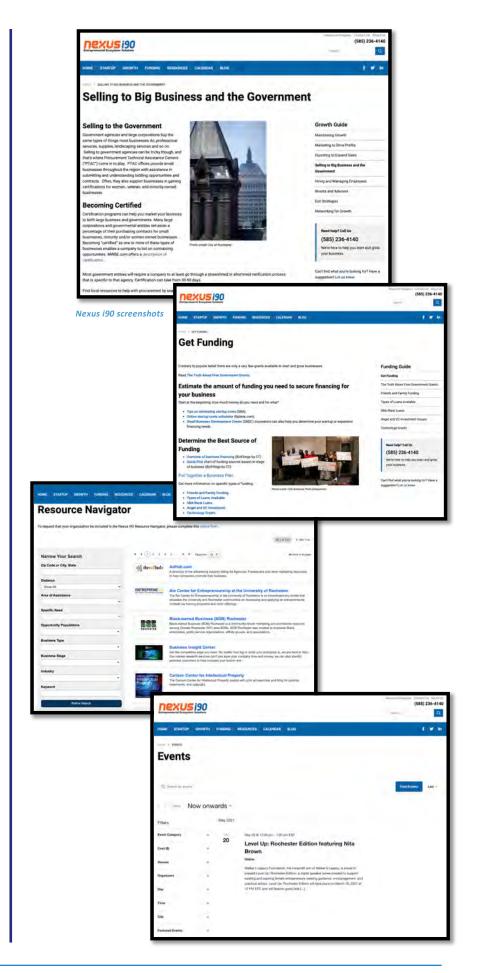
Peer-learning Cohort Program

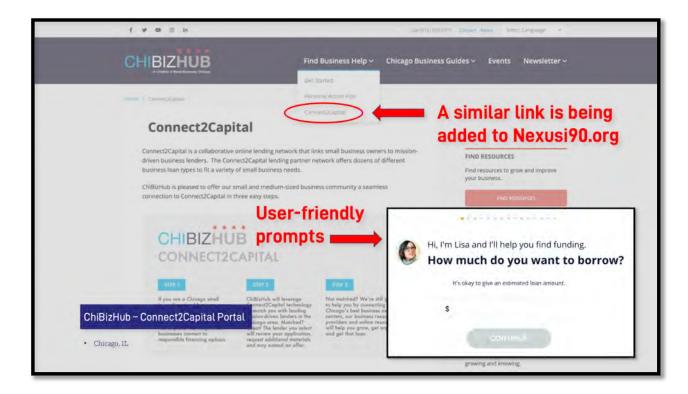
Program Planning: Determine target cohort size based on funds raised for the program: prepare requests for proposals for prospective resource partner and organizational coaches cohorts; responses should articulate proposed enhancement plans from resource partners, and demonstrate coaches' expertise and 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. inperson), 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





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)

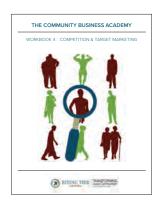
THE COMMUNITY BUSINESS ACADEMY

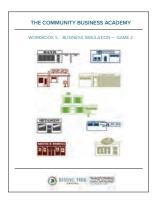
PROGRAM OVERVIEW

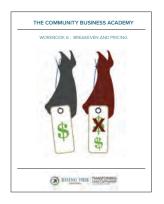








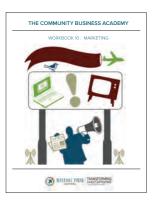


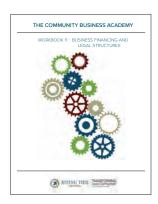
















OUR PROGRAM

The Community Business Academy (CBA) consists of 12 consecutive, three hour-long sessions taking place once a week on weekday evenings or Saturday mornings for maximum convenience and accessibility to applicants with full-time jobs or weekend obligations. Classes are taught twice per year from March through May and from September through December.

In order to be considered for the Community Business Academy, prospective students must attend an Information Session. This free orientation provides insight into the CBA program and allows our staff to evaluate each applicant and their business on an individual basis.

Every applicant accepted into the Community Business Academy receives a full tuition waiver worth \$3,000 thanks to the generosity of our funding partners. Our students' only financial responsibility is a nominal registration fee based on household income.

OUR METHODOLOGY



















Our curriculum is designed around best practices in adult participatory learning methodology, with a focus on management skills necessary to start and grow a successful, small business. This approach emphasizes experiential problem-solving, allowing us to ensure that complicated concepts like financial management are easily understood by individuals with varying educational backgrounds.

To reinforce our methodology, Rising Tide Capital has developed a cohesive series of components to consistently emphasize each of the 10 core concepts within the curriculum. Each chapter follows a carefully designed, step-by-step approach to the introduction, reinforcement, and practice of each new concept.



NEW CONCEPT

A series of key concepts relevant to a practical application of entrepreneurship introduced to students during each session of the Community Business Academy.



THINGS TO KNOW

Based on discussion, the Instructor facilitates a conversation that leads to an understanding of why their experiences during the exercise are important to their abilities to start and grow a business.



DEFINITION

Relevant vocabulary for each business concept is introduced and defined for students.



HOMEWORK

Students are given homework as a practical tool to apply the concepts learned in class directly to their business. Homework workbooks are provided to students at the end of each class. Homework can take anywhere from 3-5 hours per class.



EXAMPLES

Each chapter includes real life examples to reinforce the key concept from each class.



HOMEWORK REVIEW

The beginning of each class is used to review the homework from the previous class. The Instructor answers questions generated by the homework. Participants submit homework at the end of class to be reviewed by the Instructor for further feedback and additional support.



EXERCISE + ACTIVITIES

Students engage in an exercise (i.e. group activities around case studies, field trips, business simulation games) that demonstrate the new concepts introduced during each class.



ASSESSMENT

Various assessment tools are used throughout the Community Business Academy to measure the progress of participants' understanding of key business concepts and skills.



DISCUSSION

Students discuss and reflect on the exercise to grasp what occurred and its relationship to the new concepts that they just learned.

CURRICULUM DESCRIPTION



Class 1 - Introduction: "You the Entrepreneur" and "The Business Idea"

The class begins with a practice elevator pitch given by each of the students which serves to introduce the entrepreneurs to each other. Then the class structure and materials for the entire course are reviewed. The necessary skills and talents required to run a business are then explored as well as the personality traits and characteristics that will make a successful entrepreneur. The elements that make up a good business idea (focus on needs, wants and desires or solving a problem) are introduced and discussed.



Class 2 - Business Simulation Game #1

The business simulation game is a hands-on exercise in the practical aspects of running and managing a business. The class is divided into three teams that compete to manufacture and sell a product. Game #1 introduces the Basic Business Cycle including budgeting, financial decision making, managing cash flow, and basic record keeping as well as types of business expenses.



Class 3 - Personal Budgeting and Credit

Understanding your personal income and expenses is the first step in being able to manage your financial life. This is a class in personal financial literacy. The goal is a clear idea of what income the business will be required to generate in order to support the needs of its owner. The fundamentals of personal credit and how credit history affects credit score are also reviewed since all small business lending is actually personal lending.



Class 4 - Competition and Target Market

The first half of the class examines the important role that knowing and understanding your competition plays in designing and running a successful business. The second part focuses on understanding what a target market is, how it is described for a specific business idea, and how to use that information to design a successful marketing strategy for a product or service.



Class 5 - Business Simulation Game #2

This second version of the game introduces a more complex business environment with multiple buyers and sellers as well as a wholesale and retail market. The focus of this simulation includes developing a pricing strategy, understanding your competition, determining market demand, and managing resources such as time and money.



Class 6 - Breakeven Analysis and Pricing Strategy

Knowing when your business is generating enough revenue to pay both variable and fixed expenses is the first step in learning how to operate a business that can ultimately generate a profit over time. The method of determining a business breakeven point is demonstrated. The class also learns how to develop an effective pricing strategy to ensure long term repeat customers while taking into account market demand, the competition, and the cost of the product or service.



Class 7 - Cash Flow

The heart of any small business is its cash flow. The fundamentals of cash flow are studied here, including identifying fixed and variable expenses, determining starting and ending cash, calculating net business cash flow on a monthly basis, and tools for keeping track of cash flow over time. The class explores the role that cash flow plays in effectively managing a business to become profitable and successful over the long term.



Class 8 - Business Simulation Game #3

The third version of the game operates with the most complicated scenario. Multiple marketing strategies, complex manufacturing processes, multiple marketing with differing needs as well as strict time pressures combine to create the stress and responsibility of operating a business in a complex environment. Key concepts introduced here include cash flow and the need for an ongoing bookkeeping system.



Class 9 - Bookkeeping

Keeping track of income and expenses is important for a business in order to determine net income, manage cash flow, project future business success, report on previous business activity, operate efficiently, and file tax returns as required. The class introduces the fundamentals of a legally compliant bookkeeping system and demonstrates the reasons for keeping track of income and expenses on an ongoing basis.



Class 10 - Marketing

Effective and low cost marketing strategies are key to getting customers and increasing sales. This class covers brand identity, essential marketing collateral, target market development, effective sales strategies, promotional opportunities, and publicity. Low and no cost guerrilla marketing techniques are demonstrated. We also explore the role the internet plays in marketing a small business and the importance of an effective web presence.



Class 11 - Business Financing and Legal Structures

The challenge of financing a small business is the focus for this class. Topics include small business lending requirements (from both commercial banks and micro lenders), borrowing money from friends and family, taking on investors or shareholders, and working with business partners. The difference between money lent to your business and money invested in your business is also explained. This class also explores what business structure (such as sole proprietor, LLC, C Corporation, S Corporation) will best suit the needs of the business and its owner. The students also receive a guide to registering their business in the manner that they choose at the local, state, and federal level.



Class 12 - Intellectual Property and Insurance

This class explains the basics of business intellectual property as well as the different classes of insurance that all businesses need to consider. How can a business owner protect its ideas, identity, and intellectual property through patents, trademarks, and copyrights? What kinds of insurance will be required to protect the business (such as business insurance, liability insurance, health insurance, unemployment insurance, disability insurance)?

CONTINUUM ON BECOMING AN ANTI-RACIST MULTICULTURAL INSTITUTION

Racial and Cultural Differences seen as Deficits		Tolerant of Racial and Cultural Differences		Racial and Cultural Differences seen as Assets	
1. <u>EXCLUSIVE</u>	2. PASSIVE	3. <u>SYMBOLIC CHANGE</u>	4. <u>IDENTITY CHANGE</u>	5. <u>STRUCTURAL</u>	6. <u>FULLY INCLUSIVE</u>
A SEGREGATED	A 'CLUB' INSTITUTION	A MULTICULTURAL	AN ANTI-RACIST	<u>CHANGE</u>	A TRANSFORMED
INSTITUTION		INSTITUTION	INSTITUTION	A TRANSFORMING	INSTITUTION IN A
				INSTITUTION	TRANSFORMED SOCIETY
Intentionally and publicly	Tolerant of a limited	Makes official policy	Growing understanding of	Commits to process of	Future vision of an
excludes or segregates	number of People of Color	pronouncements regarding	racism as barrier to	intentional institutional	institution and wider
African Americans,	with "proper" perspective	multicultural diversity	effective diversity	restructuring, based upon	community that has
Latinos, and Asian	and credentials	G : 16 " : m		anti-racist analysis and	overcome systemic racism
Americans		Sees itself as "non-racist"	Develops analysis of	identity	
	May still secretly limit or	institution with open doors	systemic racism		Institution's life reflects
Intentionally and publicly	exclude People of Color in	to People of Color		Audits and restructures all	full participation and
enforces the racist status	contradiction to public	Carries out intentional	Sponsors a program of	aspects of institutional life	shared power with diverse
quo throughout institution	policies	inclusive efforts,	anti-racism training	to ensure full participation	racial, cultural, and
		recruiting "someone of		of People of Color,	economic groups in
Institutionalization of	Continues to intentionally	color" on committees or	New consciousness of	including their world-	determining its mission,
racism includes formal	maintain white power and	office staff	institutionalizes white	view, culture and lifestyles	structure, constituency,
policies and practices,	privilege through its		power and privilege	Insulant anta atmantana	policies and practices
teachings, and decision	formal policies and	Expanding view of		Implements structures, policies and practices with	
making on all levels	practices, teachings, and	diversity includes other	Develops intentional	inclusive decision-making	Full participation in
	decision-making on all	socially oppressed groups	identity as an "anti-racist	and other forms of power	decisions that shape the
Usually has similar	levels of institutional life	such as women, disabled,	institution"	sharing on all levels of the	institution, and inclusion
intentional policies and		elderly and children,	D	institution's life and work	of diverse cultures,
practices toward other	Often declares "we don't	lesbian and gays, third	Begins to develop	mstitution's fire and work	lifestyles, and interests
socially oppressed groups	have a problem."	World citizens, etc.	accountability to racially	Commits to struggle to	
such as women, disables,		27.00	oppressed communities	dismantle racism in the	A sense of restored
elderly and children,		<i>BUT</i>	.	wider community, and	community and mutual
lesbian and gays, Third		"Not those who make	Increasing commitment to dismantle racism and	builds clear lines of	caring
World citizens, etc.		waves"		accountability to racially	A 11: '.d .d .'
		waves	eliminate inherent white	oppressed communities	Allies with others in
		Little or no contextual	advantage		combating all forms of
		change in culture, policies,	DIIT	Anti-racist multicultural	social oppressing
		and decision-making	<i>BUT</i>	diversity becomes an	
			Institutional structures and	institutionalized asset	
		Is still relatively unaware		Dodofinos on dushavil 411	
		of continuing patterns,	culture that maintain white	Redefines and rebuilds all	
		privilege, paternalism and	power and privilege still	relationships and activities	
		control.	intact and relatively untouched	in society, based on anti-	
			untouched	racist commitments	

Used with permission of Crossroads Ministry. Adapted from original concept by Baily Jackson and Rita Hardiman & further developed by Andrea Avazian & Ronice Branding.

Cultural Competence Continuum

Cultural	Cultural	Cultural	Cultural	Cultural Competence	Cultural
Destructiveness	Incapacity	Blindness	Pre-Competence	•	Proficiency
Disregards cross-cultural awareness, knowledge, behavior, skills in staffing pattern, service provision, program design, etc.	Does not accept multiple perspectives as valid; there is one "right" or "best " way	Disregards diverse religious/cultural practices when scheduling hours of operation	Exhibits emerging visual representation of all ethnicities, genders, etc, as active and valued community members	Provides regular staff training in cultural competence and its relationships to service provision	Provides services in languages that meet the needs of populations served (consumers)
Creates advertising that perpetuates stereotypes (e.g. women as depressed, substance abusers as black males)	Speaks on behalf of vs. supporting special populations in efforts to speak for themselves	Plans and implements special events assuming a shared value (e.g. Christmas Party)	Recognizes that it is NOT connected with neighborhoods and coalitions that promote various groups, seeks to correct situation	Ensure that all written and visual material is respectful, in multiple languages an Braille, with emphasis on the value of difference	Takes proactive stance on the advancement of cultural competence within the community
Creates criteria that exclude or create artificial barriers, or job requirements that have nothing to do with performance ability	Sees diversity as meeting quotas	Does not recognize or compensate for specialized skills or actively objects to compensation for specialized skills	Solicits diversity feedback from all staff at all levels on a regular basis	Implements culturally competent plans and evaluates periodically for effectiveness	Provides modeling and training to other organizations on diversity
Refuses to select and recruit bilingual staff	Downplays need to hire translators and translate paperwork	Requires all sessions to be conducted in English regardless of individual or families needs	Recognizes organization's high dropout rate of minority participants and seeks change.	Has balanced bilingual staff/customer ratio and provides support to staff for "other" languages and skills	Provides mentoring program and paid stipends
Provides paperwork in English only	Puts down family values	Is rigid about following paperwork requirements	Recognizes that paperwork and bureaucracy are driving individuals and families away	Establishes committee to revise paperwork, program literature, etc., for bilingual customers	Streamlines paperwork and ensures that all material is in multiple languages
Does not recognize the importance of family participation	Uses primarily Anglo- oriented methods of treatment too rigid to consider new methods for different cultures	Ignores the strength of the family unit	Recognizes the lack of training for staff and is willing t implement a culturally appropriate training program	Screens for culturally offensive material and deletes from written and spoken communication	Offers phone line services in multiple languages
Refuses to be sensitive to different cultures		Lacks training to provide special services to minorities	Recognizes staff have cultural limitations and encourages training	Takes responsibility for bringing family into the training circle	Values families and their cultures and commits to educating family on issues critical to treatment success
				Includes cultural issues in training plan	Displays sensitivity to cultural issues and provides education to their organizations



MEMO

Date: September 30, 2021

To: Heather Hamilton and Jeff Fasser, Rapid Recovery Plan Facilitators

From: Dr. Lomax R. Campbell, Subject-Matter Expert

Re: SME Consultation Addressing Storefront Vacancies and Increasing Resources for Spanish-speaking Business Owners and Residents of Southbridge, MA

Dear Mr. Fasser,

Thank you for the opportunity to work with you on this particular project rubric under the State of Massachusetts' Rapid Recovery Planning Program. We have prepared this memo to formalize my feedback during several Zoom calls and email exchanges over the last month or two.

Overview

The Town of Southbridge is seeking to fill the high level of vacant storefronts and increase resources for Spanish-speaking business owners and residents as part of its rapid recovery planning efforts. There are a considerable number of alternatives for advancing both efforts. Some significant things to determine include the cultivation of a racial equity lens to ensure the deployment of culturally congruent economic development strategies and practices; the nature of services and resources to offer; the clusters of entrepreneurs and small businesses to focus on; the number stages of the business development lifecycle of interest; if the municipalities' efforts should prioritize working directly with small businesses or convening and coordinating the network of business support organizations serving entrepreneurs (e.g., whether or not to offer business programs and resources in house our invest in their cultivation among select community partners).

Culturally Congruent Economic Development: To kick things off, we cannot stress enough how important is for your community to look inwardly as a fundamental transformational aspect of this work. Traditionally, government, planning, and economic development agencies adhered to a universal playbook for community, business, and economic development normalized under a Euro-American worldview—emphasizing top-down approaches. Universalism and individualism are among the core premises of this construct. However, in our increasingly multiethnic, pluralistic, and linguistically diverse society, traditional

approaches are increasingly yielding suboptimal results. The emerging playbook calls for bottom-up approaches, requiring organizations and systems to adopt cultural relativism as the new paradigm to ensure success in our complex communities and economies at all levels (e.g., local, regional, national, and global). Given the unique aspects of working with the heterogenous Latinx community, your community's playbook will need to create space for interpretation services, language translation on printed and digital materials, navigating the dynamics afforded by immigration status, and a recognition of the cultural importance of maintaining "respect," making time for building authentic "relationships"—NOT rapport—and honoring the sacredness of "famalisimo" as core operating principles and values. As with other cultural communities, the Latinx community will need to genuinely "see themselves" within all levels of the organization or system as well as within community facing roles to truly embrace culturally-specific efforts for improvement—which is a metaphorical marathon, rather than a sprint.

To these ends, we have used Undoing Racism® Community Organizing Workshops facilitated by the People's Institute for Survival and Beyond (PISAB) as a starting point for our transformational work within government and with cross-sector, cross-community partners. PISAB is an inter-national collective of 100+ anti-racist, multicultural community organizers and educators dedicated to building an effective movement for social transformation. Since 1980, their learning methods have allowed them to consistently outperform their peers. This claim is evidenced by over 30 peer-reviewed scholarly journals and texts on their work, which has informed the development of community-based participatory research as a field of practice for working with diverse communities. Undoing Racism® is their signature workshop, leveraging dialogue, reflection, role-playing, strategic planning and presentations. It is an intensive process that challenges participants to analyze the structures of power and privilege that hinder equitable growth and social inclusion, preparing them to be effective organizers for justice. They average 30 to 35 workshops per month, with each lasting two-and-a-half to three eight-hour days.

• Services and Resources Offered: This alternative refers to the offerings mix such as the decision to provide business development workshops and classes, technical assistance (e.g., helping with completing financial assistance applications or writing business plans) and resource navigation (e.g., serving as a concierge and making referrals to the appropriate sequence of support services), low-to-no-cost office space (e.g., incubators, co-working) and business centers with special programs (e.g., accelerators), coaching and mentoring services, business pitch competitions, procurement-readiness certification programs and vendor pipeline development strategies (e.g., one-on-one, group, and cohort programs focused on helping businesses obtain minority and women-owned business, HUD section 3, disadvantaged business enterprise and other business certifications; also, cultivating prime and

subcontractors).

- Business Clusters Served: This aspect of business support decision-making refers to choosing what kinds entrepreneurs and small businesses to support. Our national network partner SourceLink has prepared a short video that outlines four fundamental clusters of businesses regardless of industry or sector. Each cluster generally requires different kinds of support tailored to their distinct contexts. The innovation-led cluster refers to tech, high tech, and science-based businesses. The microenterprise cluster encompasses small businesses with 10 or fewer employees, often operating in the "gig" economy. This includes freelance photographers, event planners and promoters, consultants, pursuing their craft for personal income full-time or as side jobs. The main street cluster, or "mainstreeters," corresponds to doctor's offices, law firms, restaurants, retail shops and the like that bring vibrancy to commercial corridors and neighborhoods, but whose firms are unlikely to grow too much. Lastly, the second stage cluster encompasses established firms with 10 to 100 employees capable of achieving high-levels of growth and scale.
- Business Development Lifecycle: Like living organisms, businesses go through a lifecycle. In our public sector work, we have adopted the terms "start up," "stay up," "scale up," and "split up" to broadly characterize the phases of the entire lifecycle. Within each phase, one would find the traditional stages of business development commonly taught in a Business 101 course. This includes the "seed," "concept" or "idea" stage interchangeably; the "launch" or "start-up" stage; the "growth," "shakeout," and "maturity" stages; the "expansion" stage; and the "decline," "succession," and "exit" stages within the phases, respectively. Businesses wrestle with distinct challenges, pursue different milestones, and require different kinds of support along this continuum. It would serve municipalities well to be cognizant of how support is configured to assist entrepreneurs and small businesses along this journey. There is no effective one-size-fits-all approach to small business support.
- Entrepreneurial Ecosystem Building: In addition to working directly with small businesses to build their capacity, municipalities can alternatively assume the role of convener and connector across local and regional resource networks of entrepreneur or business support organizations—interchangeably called ESOs and BSOs. ESOs tend to include government, nonprofits (e.g., public charities, foundations, community development financial institutions, economic development agencies, chambers of commerce, etc.), and academic institutions that provide any of the kinds of offerings described above. In some special cases—like coworking facilities, incubators, and accelerators—ESOs can be forprofit enterprises that offer their resources at low or otherwise moderate costs. But, ESOs do not include professional services providers like accountants, lawyers, insurance agents, commercial banks, or technology companies.

The entire network of ESOs in a community are referred to as the small business ecosystem. Uncoordinated, these actors struggle to meet businesses where they are in culturally and contextually congruent ways capable of helping them achieve their goals and objectives. This reality has given rise to the emergence of entrepreneurial ecosystem building, which entails the active pursuit of inclusive coordination and systematic enhancement of the local or regional ESO network. Subsets of ESOs in these networks focus on or specialize in particular small business clusters and stages of the business development lifecycle. Ecosystem building is a team sport, and municipalities can play essential leadership roles in mapping, realigning, augmenting, and investing in the improvement of their small business ecosystems to scale business capacity building and growth activities through cooperation—realizing collective impact.

Planning

Planning considerations can be as nominal or as expansive as the array of resources available and capacity building strategies pursued by a given community. To that end, here are a few high-level parameters by selected activity category:

Culturally Congruent Approaches:

- O Hosting Undoing Racism® Workshops require a budget of up to \$20,000 per workshop for up to 35 participants. Anti-racism/equity training provided by other vendors can range from \$10,000 to \$35,000 per training depending on the nature, modes of delivery, scope, and number of participants served. Additional costs may be incurred if the material procured is for the development of original or custom content that will become the property of the municipality or its community partners for ongoing deployment. Post-training, it will be imperative to invest in additional support resources and create space for ongoing dialogue and engagement within and across all levels of the organization, partner network, and the community. These commitments and steps can command a dedicated budget focused on achieving and maintaining systemic congruence between the municipality, employees, community partners, funders, and the community. Budgets vary greatly based on the scale and activity mix under this organizational culture change agenda.
- Costs can include facilitator fees, travel, lodging, ground transportation, facility rentals, refreshments (e.g., meals and snacks), and training supplies.
- Resources can include hardware (e.g., computers, projectors, screens, printers, etc.), software (e.g., Internet service and specialized software subscriptions for managing registrations, video conferencing, collaborating, and soliciting feedback), facilities (e.g., conference and meeting rooms, blank walls for posting, etc.) furniture (e.g., tables and chairs on casters), and supplies (e.g., easel, markers, flipcharts, nametags, decorations), and service providers (e.g., catering)

- Regarding timing, planning can take two to six months from conception to execution and follow-up.
- Key performance indicators include participation rate, recall rates, employee and customer satisfaction rates and net promoter scores for the training and/or subsequent dialogues, the number of organizational change opportunities identified and address, and various measures of belonging, cross-cultural cohesion, and stress rates.
- Risks are low to moderate, by may include various forms of fatigue (e.g., racial battle fatigue syndrome, White fragility, etc.), backlash, and sabotage, and employee turnover. Efforts can also falter without strong leadership support and resources, or if the responsibility for these efforts are placed upon the shoulders of one person or a small team with little authority or improperly located within the organizational hierarchy.
- Actions include the decision to center and "A.B.I.D.E. by anti-racist principles," where A.B.I.D.E. is short-hand for accessibility, belonging, inclusion, diversity, and equity and anti-racism explicitly acknowledges the additional challenges confronted when the matter of "race" is layered on top of intersecting issues (e.g., race + gender, race + ability, race + LGBTQ, race + poverty, etc.).
- The process involves clarifying the nature and magnitude of the problem and the relevant stakeholders, making a commitment to an antiracist/equitable transformation journey, determining the nature and scope of the change agenda as well as the schedule per instance or annum, identifying and allocating the appropriate level of resources (e.g., talent, physical, time, and financial), executing the change strategy, and following up to keep the momentum going. I have also enclosed the "Ten Steps for Hosting" an Undoing Racism® Workshop for consideration.

Workshops and Classes:

- o Unless developed in-house, budgets may span \$15,000 to \$45,000.
- Costs can include curricular asset acquisition with onboarding and year one licensing fees, course/event registration (e.g., Eventbrite, Sign-up Genius, etc.) and data system subscriptions (i.e., learning management systems, customer relationship management systems, etc.), collateral and digital design, marketing and promotions, and supplies.
- Curricula licensing and technology subscriptions may require annual renewal fees in addition to the range above.
- Resources can include programs and assets offered by regional, national, and international ESOs with proven programs such as EforAll, Rising Tide Capital (e.g., Community Business Academy), Kauffman (e.g., FastTrac, 1 Million Cups), CO.STARTERS, Digital Main Street, Next Street, Forward Cities, and Mass Challenge. This is not intended to be a complete list.
- These activities should take less than six months to identify vendors and launch the first cycle of workshops and classes. Offerings may be administered annually, semiannually, by trimester, or quarterly

- Key performance indicators can include the enrollment and program completion rates, participant satisfaction rates, net promoter scores, the amount of funds raised in support of the program, the number of businesses achieving their goals (i.e., by goal area). It can also include the number of training hours provided and amount of funds awarded.
- Risks for this offerings category is low and primarily concerns low adoption/participation rates and unfavorable reviews. These programs can also be labor intensive to effectively develop and administer.
- Actions include determining what kind of training to offer and the target categories and stages of small businesses to serve—deciding whether to develop a bespoke program or to adapt/adopt an existing model(s).
- The process should begin with an environmental scan of existing business support workshops and classes and an assessment of what is missing. Community engagement should allow the municipality or community partner to elicit the kinds of developmental content most desired and/or needed by the small business community. Once the need has been determined, program development and resource acquisition begin. If developed in-house, the provider will need to outline and develop materials and the sequence and modes of delivery. Subsequently, marketing and promotions is an essential means for driving enrollment with such considerations as requiring advanced registrations versus allowing walk-ins. Program administration follows along with options for personal office hours and post-program engagement (e.g., surveys, check-ins, and exit interviews) to determine the effectiveness of the program.

Technical Assistance (TA) and Resource Navigators:

- If performed in-house, an ideal budget may span \$56,589 to \$92,651 per staff member.
- This is the annual median cost range for salaries plus 30% for benefits for full-time *Training and Development Specialists* (\$71,270), *Social and Community Service Managers* (\$67,310), *Community and Social Service Specialists*, *All Other* (\$43,530) based on the following Standard Occupation Classification Codes 13-1151.00, 11-9151.00 and 21-1099.00, respectively for the State of Massachusetts.
- Figures obtained from <u>www.onetonline.org</u>, our nation's primary source of occupational information.
- Sample job titles include, but is not limited to: Business Instructor/Advisor, Program Coordinator, Business Specialist, Small Business Development Manager, Site Coordinator, and Network Navigator.
- Key performance indicators include the number of small businesses served (i.e., new and retained), and targeted milestones and goals achieved to mark their progression along the business development lifecycle (e.g., viable proof of concept, entity formation, capital raised,

- sales volume and average size, customer size and repeat rates, number of jobs created/retained, certifications attained, growth and expansion). Internal metrics include the number programs under management, partnerships formalized, and funds raised to support new and existing programs.
- Risks are generally low to moderate and may include accessibility, low morale, burnout, and turnover if employees are under resourced, feel unappreciated, or are over allocated (i.e., "stretched too thin"). It is also important to align employee interests and skills to the scope and nature of the work. Training and additional staff may be necessary steps for mitigating these risks.
- Regarding timing, technical support staff should be hired as early in the
 process of rendering service as possible to ensure effectiveness, making
 it a short-term prospect. Staff hired in the midst of program
 administration face steeper learning curves and shorter onboarding
 support. Additionally, business support staff should be in empowered to
 contribute to the development and refinement of the offerings portfolio.
- Actions include the decision to allocate staff resources to small business support activities and initiating the hiring process once the requisite budget is obtained.
- The process involves framing the specific small business need(s), determining the sources of funds, portfolio of work, and operating resources needed to ensure success. This includes resources for marketing the new available resources and services and whether community partnerships are needed for augmentation.

Office Space and Business Centers:

- These costs can vary significantly based on a number of factors, but may include property acquisition (\$750,000 \$3,000,000), buildout of new or existing municipally-owned facilities (e.g., \$50,000 \$200,000), staffing (see above), and operating costs. Incubators, co-working facilities, and pop-up market opportunity programs can be configured to create a pipeline into permanent commercial corridors and storefronts for informal entrepreneurs and start-up companies. For more established businesses, expanding into larger or additional spaces may require solicitation, encouragement, site selection support, market development assistance, and financial incentives, especially to de-risk the investment. For the programmatic aspects of this section, refer to the prior sections above for details on budget ranges, possible costs and resource details, risks, timelines, and actions and process ideas.
- Key performance indicators for brick-and-mortar investments include occupancy rates or the number of subscribing members or center participants; profitability and efficiency measures (e.g., low costs); number of programs offered, funds raised and number of partnerships formed in support of programmatic efforts.

- Risks can be medium to high depending on whether or not new or existing facilities are acquired and developed, accessibility, the total cost for development, staffing, and ongoing operations; in addition to adoption rates since the presence of a new center does not automatically mean that businesses will take advantage of the resource.
- Timelines will also vary with this approach based on the above decisions.
 However, retrofitting an existing facility or space can range from a few months to a year.
- These actions and processes vary, but are commonly understood by most municipalities as these falls within the scope of general municipal operations.

Specialized Events and Pipeline Programs:

- Whether in-house or outsourced, budgets may span \$5,000 to \$75,000 per year.
- These costs can comprise program materials, facility rentals, catering, event supplies, instructor/trainer fees, entertainment fees, audio visual and technology services (e.g., sound systems, projectors, and screens), event insurance, awards, small business grants.
- Refer to "Workshops and Classes" above for general resource options, key performance indicators, risks, actions, and processes.
- In the case of annual pitch competitions and small business galas, specialized resources may involve procuring the assistance of an event planner, cater, emcee, deejay or band.
- In the case of organizational pipeline programs, specialized resources can require the services of quality consultants or software vendors that offer solutions designed to clarify and streamline organizational processes for increased efficiency and performance.

Entrepreneurial Ecosystem Building:

- o These resources can be procured for \$25,000 to \$150,000 per year.
- Refer to the enclosed Best Practice Sheet titled, "Facilitating Inclusive Entrepreneurial Ecosystem Building and Enhancement" for actions and process steps associated with the development of www.Nexusi90.org (powered by SourceLink) in Greater Rochester (NY)/Finger Lakes Region.
- The costs above may cover platform implementation, training, two to five years of technology and data system fees, collateral and digital ad design, printing, event planning and hosting, marketing and promotions, network research and development, and a hotline.
- Qwally is another one of our national network partners that offers certification compliance and inclusive procurement "GovTech" solutions to municipalities. Their solutions are ecosystemic because their base platform implementation allows municipalities to refer businesses to selected local and regional ESOs for technical assistance at different

- places along the user journey for zoning and permitting, certification, licensing, funding, and procurement activities.
- Ecosystemic enhancements to network partners can cost an additional \$375,000 to \$1,500,000 for three to 6 ESOs to deepen their collaboration and improve their relevance and organizational capacity to assist small businesses, making them ideal referral partners. This is based one of our own proprietary ESO capacity-building programs.
- The time to build, launch, market, expand, and possibly enhance the network should take place over three to five years as this is a social transformation program that takes time to shift the local/regional culture.
- o Regarding resources, Kauffman Foundation has convened an annual global <u>ESHIP Summit</u> to advance entrepreneurial ecosystem building as an emerging industry sector and occupational field of practice. They have culminated the summit community's collective learning and progress into a phenomenal and instructive <u>playbook</u> for ecosystem builders. In addition, in March 2021, the International Economic Development Council announced its new certification on <u>entrepreneur-led economic development</u>, which focused on entrepreneurial ecosystem building. For what it is worth, a case study on our work in Rochester is featured in the coursework.

It is my hope that this memo has equipped you with an array of possibilities with sufficient depth for completing your project sheets. Please feel free to contact me directly with questions.

Regards,

Dr. Lomax R. Campbell, MBA, PMP®, LSSBB, RYT®

President and CEO

Enclosures

- "Ten Steps for Hosting" an Undoing Racism® Workshop
- Cultural Competency Continuum
- Continuum on Becoming an Anti-Racist Institution
- Nexus i90 RRP Best Practice Sheet
- SourceLink Proposal for Rochester, NY (example)
- Qwally Proposal for Rochester, NY (example)
- Community Business Academy Overview Materials



Placemaking: Create attractive destinations in old Mill structures and market to make the case

Culturally-specific Strategies: Nearly 50% Latinx population

Business Retention Strategy: Significant legacy mom-and-pops

Southbridge Business Partnerships - Mainstreet Businesses and Community Organizations; struggling to grow beyond 70 members

Difficult to get businesses and community involved

Anchor partner collaboratives

Ecosystem building: Entrepreneurial Ecosystem Building Playbook 3.0 © 2019 https://www.kauffman.org/ecosystem-playbook-draft-3/



The Peoples Institute for Survival and Beyond Undoing Racism® workshop

The People's Institute for Survival and Beyond (PISAB), is a national and international collective of antiracist, multicultural community organizers and educators dedicated to building an effective movement for social transformation. The People's Institute believes that racism is the primary barrier preventing communities from building effective coalitions and overcoming institutionalized oppression and inequities. Over the last 39 years, we have provided training, consultation, and leadership development to more than 200,000,000 people nationally and internationally. Through Undoing Racism®/Community Organizing Workshops, technical assistance and consultations, The People's Institute helps individuals, communities, organizations and institutions move beyond addressing the symptoms of racism to undoing the root causes of racism so as to create a more just and equitable society.

Undoing Racism is our signature workshop. Through dialogue, reflection, role-playing, strategic planning and presentations, this intensive process challenges participants to analyze the structures of power and privilege that hinder social equity and prepares them to be effective organizers for justice. Our multiracial team of organizers/trainers includes more than 40 people whose anti-racist organizing expertise includes years with civil, labor and welfare rights struggles, educational, foster care, social service and health reform movements, as well as youth and grassroots community organizing. The People's Institute averages 30-35 Undoing Racism®/Community Organizing workshops per month.

Workshop participants will:

- Develop a common working definition of racism and an understanding of its different forms: individual, institutional, linguistic, and cultural;
- Develop a common language and analysis for examining racism in the United States;
- Understand one's own connection to institutional racism and its impact on their work;
- Understand why people are poor and the role of institutions in exacerbating institutional racism, particularly for poor people and communities of color;
- Understand the historical context for how racial classifications in the United States came to be and how and why they are maintained;
- Understand the historical context for how U.S. institutions came to be and who they have been designed to serve;
- Understand how all of us, including white people, are adversely impacted by racism every day, everywhere;
- Address surface assumptions about how your work is (or is not) affected by racism;
- Develop awareness and understanding about ways to begin Undoing Racism;
- Gain knowledge about how to be more effective in the work you do with your constituencies, your organizations, your communities, your families;
- Understand the role of community organizing and building effective multiracial coalitions as a means for Undoing Racism.



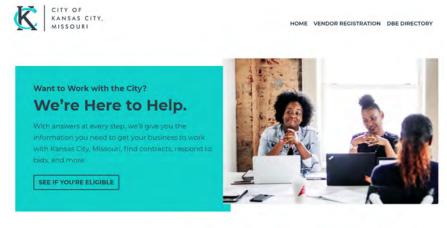
City of Rochester, NY

March 10th, 2021

Matt Cody | Chris Offensend | James Schafer

Qwally

Human-centered software to help small businesses access resources and opportunities



Learn What the City Buys

There are many ways to determine how much the city has spent on certain types of goods and services in years past and what is projected to be spent this year by searching the Spending Explorer.

SPENDING EXPLORER



Self-serve program and process navigation tools for small businesses

Efficient and reliable coordination of information for and about small businesses and local support resources

Data and insights that lead to process improvement city-wide

Qwally Platform

Self-Serve Tools for Government and Small Business



Small Business Portal

Visible program page with a streamlined user experience



Small Business Navigator

Tailored information to support individual businesses



Directory

Easily searchable directory of local small businesses



Applications

Easy to use online application experience for city programs and certifications

Inclusive Procurement

Base implementation focused on MBE, WBE, DBE, and Section 3 Certifications

Inclusive Procurement Portal

Plain-language Program Content

Mobile-friendly layout and navigation

Custom-branding for Rochester

Small Business Navigator

Online Intake Questionnaire

Online business profile including compliance checklists for MBE, WBE, DBE, and Section 3

Section 3 Application

Online Application for Vendors and residents seeking Section 3 Certification

Collects ownership information, and verifies eligibility

City Users can review and approve application

Rochester M/W/BE Directory

MBE, WBE, DBE, and Section 3 Directory

Search by NAICS Code, location, or certification

Localized to Rochester, Monroe County, and Finger Lakes region

Can be configured for internal and public use

Administrator Dashboard

Track program metrics and participant progress

Content management system for Inclusive Procurement Portal

Search for vendors and message through profile

View and approve applications, refer vendors to supportive partners

Add-On: Capacity building

Adding new functionality to support contractors as they grow

New Portal Content

Example: Content for professional licenses

Additional Applications:

Example: SBA 504 Loan Application

Small Business Navigator

Example: "How to become a subcontractor"

New Programs

Example: PPP Prep Program Application

Add-On: Linking the ecosystem

Connecting new partners and programs for a comprehensive solution for small business

Centralized Portal

One-Stop-Shop for all small business

Ecosystem Partners

Add anchor institutions, ESO's, and others as administrative users

Business Licensing

Add Small Business Navigator for Business Licensing

Analysis

Data driven insights for program improvement

Software License Pricing

Annual License Fee for Base Features: \$60,000

Add-on features are priced individually

Add-ons can be added to the annual license at any time on a pro-rated basis

Base Implementation	Add-on Features	
City of Rochester Inclusive Procurement Portal	One-Stop Small Business Portal	
Inclusive Procurement Small Business Navigator	Contracting Small Business Navigator	
	Business Licensing Small Business Navigator	
Section 3 Application	SBA 504 Loan Application	
Rochester M/W/B/E Directory	PPP Prep Program Application	
	Ecosystem Partner Administrative Dashboard	
City of Rochester Administrative Dashboard	Data and Reporting	



A software system to engage with, monitor, and support individual business owners and the local economy of Rochester, New York











www.qwal.ly

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Matt Cody matt@qwal.ly James Schafer james@qwal.ly



April 18, 2019

Entrepreneurial Ecosystem Development Plan Rochester, NY MSA

At SourceLinkSM, we understand that developing a truly effective entrepreneurial ecosystem requires an expertly tailored mix of technology, community engagement, and data measures. Over the last decade, we have helped communities come up with their unique recipe of these base components to inform continuous improvement and economic impact. While admittedly, no foolproof plan in the economic development industry exists, we have built a roadmap that communities of all sizes have put to successful use.

Beginning with simple outreach and promotion, a network can become more effective as it *engages, listens, responds* and *collaborates* to solve problems and fill gaps within the entrepreneurial ecosystem. By operating as the central "hub" of the ecosystem, an organization can learn what kinds of resources are in most demand, what kinds of businesses are being developed and what is missing.

In order for the SourceLink model to be effective, you must first have a strong foundational toolkit from which to operate from. All of this starts with building your network, activating your network, and leveraging the network for meaningful entrepreneurial impact.

The focus of the first year of entrepreneurial ecosystem development should be on **building your network**. This includes identification of resource organizations that serve owners in your community. Through our SourceLink methodology, we will catalog the most comprehensive picture of all available resources in your region and help you develop a searchable database to highlight your region's unique offerings.

The second year of ecosystem building efforts should focus on learning about your entrepreneurs and their needs to **activate the network**. During this phase, we recommend folding in services that capture business outcome data.

By the third full year of system implementation, you can **leverage your network**. Your resources should be well acquainted, entrepreneurs informed about resources, and your focus as an entrepreneurial ecosystem-building champion can shift to collaborative outcomes and meeting true business community needs through identified gaps.

While SourceLink provides tools to position you as the champion for your ecosystem building efforts, there are even greater emergent benefits for those who join the SourceLink family. These perks include exclusive opportunities at a semi-annual Summit dedicated to entrepreneurial community building, regular Town Hall

webinar affiliate meetings, on-going technology enhancements based on feedback from entrepreneur support organizations (like yours), and valuable, personal, global connections to top thought leaders doing this important work.

Year I: Building the Network

The focus of the first year of entrepreneurial ecosystem development should be on identification of resource organizations that serve businesses in the area. Through our SourceLink methodology, we will catalog the most comprehensive database of resource organizations, determine the services that are available to business owners, and put it into an online searchable database that entrepreneurs can use at any time to access your region's unique offerings.

Foundational Ecosystem Toolkit

The Resource Navigator® Smart Search Database

Organize and optimize your entrepreneurial ecosystem with The Resource Navigator, a user-friendly, online search engine that allows entrepreneurs and small business owners to search the network for resources that fit their industry, business stage and challenge. Backend administration allows for fast updates and complex reports to help inform entrepreneur usage by zip code, industry, business stage, assistance requested and much more.

SiteConnexsM Website Framework

Increase your visibility with SiteConnex, an enterprise level website technology that lets you build community, foster collaboration and engage entrepreneurs. Template website features include a robust blog engine, sophisticated calendar and easy-to-edit content management system, all of which will be customized to fit your desired look and feel. When coupled with the Resource Navigator, partners can be provided user accounts to add events and update their profile. Hosting, development and on-going technical support included.

SourceLink Pro® Customer Relationship Management & Decision Support System Software

Being able to track economic impact is essential. SourceLink Pro, SourceLink's comprehensive client management system, lets you monitor, survey and showcase your entrepreneurs' successes, so you can make fact-based program decisions—and share your importance and economic impact with stakeholders. This tool serves as your underlying decision making engine by connecting people and organizations as well as providing a better understanding of your ecosystem.

The Four Quadrants of Entrepreneurship & Mapping Entrepreneurial Assets workshop

Communities of any size often have an abundance of resource organizations, all seeking the same outcome: to help local businesses start and grow. From Small Business Development Centers to advanced and specialized accelerators, communities must both identify and then direct entrepreneurs to best fit resources. The first step in this process is to gather service

providers together to identify available resources. This workshop explores the uniqueness of your entrepreneurial ecosystem, sets expectations for understanding the kinds of entrepreneurs and their needs, and is the starting point to building The Resource Navigator.

Annual Progress Report

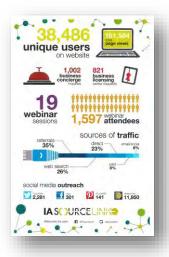
In order for a community to move forward, it must have the ability to look back. This first annual report will provide a baseline assessment that will later form the foundation for being able to recognize ecosystem development under the SourceLink model.

Recommended Success Measures

With the utilization of software tools and our recommended resource partner development guidance, by the end of the first year, you will be able to report about your community's standing and strengths.

Critical data points at the end of the first year can include:

- Number of resource partners engaged
- Number of business events
- Entrepreneur interest areas for assistance
- Online website statics for traffic
- Visibility, as measured by social media footprint





Year II: Activating the Network

The second year of ecosystem building efforts focus on learning about your entrepreneurs and their needs. At this stage, we recommend folding in technologies and services that capture direct business owner data. SourceLink provides on-going technical support and consulting around how to active the network.

Foundational Ecosystem Toolkit

Hotline Referral Service

The hotline is the foundation of linking resources to entrepreneurs. The hotline is answered by a real person who is able to gather demographic information from callers and recommends best-fit resources for entrepreneurs to connect with. Managing a phone line and proving no-cost referral services to your owners will help you attract and capture valuable business owner information, especially powerful when used in combination with SourceLink Pro.

Annual Progress Report

The second annual report will build on and enhance data first collected last year. The report will demonstrate where ecosystem growth has been facilitated and reveal opportunities for improvement in the coming year.

Enterprise Ecosystem Toolkit

Entrepreneurial Communities Workshops

By the second full year, SourceLink has developed a number of workshops that can be provided to fuel momentum and help educate resource partners on areas of potential development. These workshops include *Building Entrepreneurial Community: Tips and Tricks for Bringing your Resource Community Together, Lessons from the Front: Best Practices in Developing an Entrepreneurial Ecosystem,* and *Taking the Pulse of Your Community: The Entrepreneurial Ecosystem Scorecard.*

Website Framework Enhancement: Shop Local

Local business is big business. Help area owners get involved by installing the Shop Local module on your website. Entrepreneurs love the free exposure, you will appreciate the additional traffic and online feature to market, and web visitors appreciate the ability to find local firms to patronize.



Website Framework Enhancement: Business Licensing and Permitting

A common source of pain for entrepreneurs is understanding business licensing and permitting. With our simple to use add-on module for SiteConnex, owners can use a similar smart search technology leveraged by The Resource Navigator to find the right licensing and permitting information and/or application that they need.

Gap Analysis Report

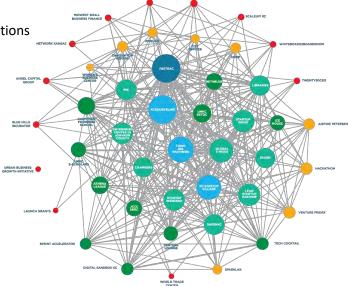
At this stage of development, SourceLink can benchmark your community against a national network of entrepreneurial ecosystems to help you better understand your region's strengths and opportunities. An assessment of capital sources is also included.

Recommended Success Measures

In addition to the data collected and reported on during the first year, this is the time that your community should be able to track business startups, sales and employment counts. You will be able to identify trends in what common struggles your entrepreneurs' experience, which resources are being utilized, and can work strategically toward partner coalitions to address systemic obstacles during the next year.

Critical data points at the end of the second year can include:

- Gap reports
- Entrepreneurial activity snapshots and interactions
- Partner engagement and collaboration
- Funding resources
- Jobs, starts, debt/equity infusion, sales



Year III: Leveraging the Network

By the third full year of system usage, your resource network should be well acquainted, entrepreneurs should be informed about available resources, and your focus as an entrepreneurial ecosystem building champion can shift to collaborative outcomes and how you are doing meeting systemic entrepreneur community challenges. SourceLink will provide on-going technical support and consulting around how to leverage the network

Foundational Ecosystem Toolkit

Annual Progress Report

The final annual progress report will recap all of the successes made during the three-year period using the SourceLink model.

Enterprise Ecosystem Toolkit

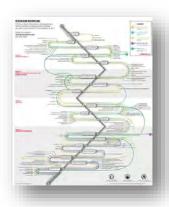
Entrepreneurial Communities Workshops

SourceLink support shifts to a consultative role during the final year. At this stage, we are most useful to our affiliates as consultants to assist in facilitating the following workshops and presentations for your network:

Find a Need, Fill a Need: Gap Analysis for Your Entrepreneurial Community Driving Future Impact: Community Strategic Planning (Series)
Being "Social": Leveraging Social Media to Share the Entrepreneurial Story Setting up an Annual Measurement System

Resource Rail Print Guide (see right)

The print Resource Rail is a robust inventory of the entire entrepreneurial community. It provides businesses with visual guidance through a much deeper understanding of resource partners and specific entrepreneurial needs (e.g. capital, stage of company, etc.).



We Create & We Create Capital Reports

Tell the story of your ecosystem's growth through entrepreneurial density, network connectivity, workforce, while at the same time; champion all the different kinds of entrepreneurs in your region. The *We Create* report can accomplish both in an interactive and engaging print piece. *We Create Capital* takes a similar approach, but focuses solely on capital resources.

Recommended Success Measures

The result of building, activating and leveraging a network is a strong entrepreneurial ecosystem. With the right data, the right funding, the right partners and community support, an organization can begin to drive entrepreneurship economic development. By year three, your success metrics should show new powerful data points like:

- Leveraged funding
- New programs to meet data-proven ecosystem gaps
- Large scale collaborations among resource partners
- Streamlined offerings and more cross-referrals of entrepreneurs through the network
- Growth in critical economic measures: density, connectivity, financing, and talent / workforce



SourceLink Ecosystem Toolkit Investment

Year I: Building the Network Foundational Enterprise

Resource Navigator® (Installation, Hosting, Training, Support)

SiteConnexsM (Installation, Hosting, Training, Support)

Included

SourceLink ProsM (Installation, Hosting, Training, Support)

Included

Four Quadrants & Asset Map Workshop

Included

Annual Progress Report

Included

Year II: Activating the Network Foundational Enterprise

Resource Navigator® (Hosting, Upgrades, Support)

SiteConnex™ (Hosting, Upgrades, Support)

Included

SourceLink Pro™ (Hosting, Upgrades, Support)

Included

Hotline Training

Included

Annual Progress Report

Included

Additional Workshops \$2,500 each

Shop Local Module \$5,000/\$2,500 annual Business License Module \$5,000/\$2,500 annual

Gap Analysis Report \$10,000

Year III: Leveraging the Network Foundational Enterprise

Resource Navigator® (Hosting, Upgrades, Support)

SiteConnex™ (Hosting, Upgrades, Support)

Included

SourceLink Pro™ (Hosting, Upgrades, Support)

Included

Annual Progress Report

Included

Additional Workshops \$2,500 each
Resource Rail Print Guide Custom Quote
We Create | We Create Capital Reports Custom Quote

Total Project Investment Foundational

Year 1 Rochester NY MSA \$70,000

Year 1 Finger Lakes Region \$75,000

Years 2 & 3 20% of Year 1 investment

Note: Travel expenses billed upon approval at cost.

Our current and past list of affiliate network: www.joinsourcelink.com/about/meet-our-network

Notice: This Scope of Work has been tailored specifically for Rochester NY and is guaranteed for a period of up to four (4) months from 4/18/2019. All content is Copyright ©2019 The Curators Of The University Of Missouri On Behalf Of SourceLink® & U.S. SourceLink®. All Rights Reserved.

Undoing Racism®/Community Organizing Workshop TEN STEPS TO HOSTING

by The People's Institute for Survival and Beyond

The People's Institute's calendar fills up 2-4 months in advance. Please review and consider the following as you prepare to host an Undoing Racism®/Community Organizing Workshop:

Step 1: Become Familiar!

A careful perusal of our websites will answer many questions about the People's Institute, the Undoing RacismTM/Community Organizing Workshop and our trainers.

- National Office New Orleans, LA: http://www.pisab.org/
- North West Office http://www.antiracistalliance.com/

Step 2: Clarify Your Needs

Before hosting an Undoing Racism®/Community Organizing Workshop, it is important for both you and the People's Institute to clarify your needs. Please consider the following:

- Why does your organization or community want to have an Undoing Racism®/Community Organizing Workshop?
- Are there specific concerns that you hope this workshop will address?
- Is there some particular incident, event or pressure that is causing your organization or community to consider hosting a workshop?

Step 3: Identify Your Constituency

- Who is the workshop for?
- Would this workshop be an in-house training, specifically intended for members of your organization? If so, will participants be invited, urged, or required to attend?
- Would this workshop be a collaborative effort, involving two or more organizations, communities, agencies, etc.? If so, what segments of the community will be represented?
- Do you expect that this workshop will be racially mixed? If not, how will you ensure some diversity? Whenever possible, Undoing Racism®/Community Organizing Workshops are done in racially diverse settings. Exceptions are made only in certain circumstances and with prior agreement from the organizers/trainers.

Step 4: Contact the People's Institute

Once you have read through our materials and have given some thought to the above questions, please contact the National Office at 504.301.9292. We will be happy to answer your questions about the People's Institute for Survival and Beyond and the Undoing Racism®/Community Organizing Workshop.



Step 5: Preliminary Consultation

The People's Institute is committed to providing Undoing Racism® training with adequate preparation and follow-up in the local community. We understand the workshop as part of a larger process to strengthen and broaden a movement for social justice and equity and to strengthen your work.

Prior to a workshop, we will encourage all sponsoring organizations, especially those that are developing a community coalition, to consider having our trainers meet (in person or via conference call) with prospective participants prior to a workshop. We find that this step not only relieves fears and helps answer many questions, but it also increases effectiveness of this workshop. A preliminary meeting offers an excelled opportunity for the People's Institute organizers to encourage participants and convince them of the value of the PISAB process.

Step 6: Access Organizational Finances

EXPENSES:

- Workshop Fee: The basic fee for a two or two and ½ day Undoing Racism® workshop is developed in partnership with the host organization. Call us for details regarding your situation. Included in the fees are the following
 - o Round-trip transportation to and from the workshop site for the trainers. This includes airfare and cab/shuttle or car rental.
 - o Hotel accommodations for the trainers.
 - o A per diem for each trainer that covers meals during the course of the workshop.
- Training site: A large meeting room that is capable of holding at least 35-40 people comfortably is required for the workshop. Also, if your training site is far away from participants' homes (i.e. in a retreat center), you may need to provide overnight accommodations for participants.
- Meals: Hosting organizations are responsible for the meals which usually include continental breakfasts, lunches and snacks for two breaks at the site, or participants may choose to go out. We encourage bringing in lunches in to keep the participants together. Again, this expense can vary greatly depending upon the needs and interests of the group.
- Other Possible Expenses:
 - o Preliminary/Follow-up consultation
 - o Publicity
 - o Child care
 - o Supplies

INCOME

• Grants: General financial support to underwrite the cost of an Undoing Racism® workshop can be sought from:



- o The organizations that are hosting the workshop;
- o Local faith-based organizations, churches, community organizations, businesses, or other groups that are willing to invest in the work of Undoing Racism®;
- o Foundations. The People's Institute can provide leads on potential funding sources.
- Scholarship Donations: Individuals who are committed to the work of Undoing Racism®, especially those who might not be able to attend a workshop, can make scholarship donations so that others can afford to attend.
- Registration fees: Registration fees can be calculated to cover the balance of the workshop expense. To determine registration fees, we suggest a sliding scale formula. Please note: unless prior arrangements are made with the People's Institute, Undoing Racism® workshops are to have no fewer than 20 and no more than 40 participants.

Step 7: Set a Workshop Date

Once your organization decides to host an Undoing Racism® workshop, potential dates can be discussed with the Logistics Coordinator, at the People's Institute. After setting up the date, a Workshop Information Form (WIF), and Logistic form will be emailed. Upon receipt of the completed paperwork, the Administrative coordinator will send a contract and invoice. To secure the date, a 15% non-refundable deposit and the signed contract, is required.

Step 8: Meet with the Trainers

At some point before the scheduled workshop date, workshop hosts/organizers will have a meeting or conference call with the People's Institute trainers assigned to your workshop. The purpose of this meeting is to clarify needs, discuss expectations, establish goals, and develop an agreement for working together. Some groups may find it helpful to take this step prior to making a final commitment to host a workshop.

Step 9: Make Workshop Arrangements

Preparation for Participants: It is very helpful if all participants are aware of the following:

- The purpose of the Undoing Racism®/Community Organizing Workshop. Each participant can be given a sheet with "Anticipated Outcomes" of the workshop as well as a description of the People's Institute mission, vision, history and principles.
- The commitment they are making. All participants should be aware of what they are committing themselves to, and that they are expected to stay for the entire workshop.
- The cultural sharing time. At some workshops there will be a cultural sharing, time permitting. Participants will appreciate advance notice of this opportunity to share.
- The workshop schedule. A typical Undoing Racism® workshop runs on a schedule similar to the ones below. There can be variations on start and ending times. Check with the workshop host and/or trainers for details.



Typical workshop schedules, cont'd:

Day One	Day Two	Day Three
9PM – 5PM	9AM – 5PM	9AM – 1PM
6PM – 9PM	9AM – 5PM	9AM – 3PM

The Meeting Room: Please be sure that the meeting room has:

- Adequate space for the entire group (10-40 people) to sit in a large circle without tables or desks;
- Sufficient number of comfortable chairs (participants are seated for most of the workshop);
- Appropriate lighting;
- A comfortable temperature;
- Space to post newsprint;
- Limited noise distractions, e.g. phones, fans, kitchens, traffic, music.
- Supplies, including the following items:
 - o Post-It Easel newsprint
 - o Easel
 - o Multi-colored markers
 - o Masking tape if the newsprint is not post-it
 - o Paper and pencil for participants

Step 10: Publicity

Please note that all <u>announcements</u> of the Undoing Racism®/Community Organizing Workshop (press releases, ads, brochures, flyers, etc.) must be reviewed by the People's Institute staff BEFORE being released to the general public. We can provide sample materials that may be of assistance.

Other Tasks may include organizing the following:

- o Registration (including receiving and providing receipts for payments)
- Housing
- o Meals (including vegetarian, vegan, gluten free, etc. options)
- o Coffee, tea and snacks
- o Special needs accommodations
- o Child care
- o Airport shuttle
- o Map/directions for participants and trainers from out of town

If you would like to set up a workshop with your organization, please contact:

The People's Institute for Survival and Beyond

601 N. Carrollton Avenue, New Orleans, LA 70119

phone: (504) 301-9292; fax: (504) 301-9291

messages@pisab.org



Undoing Racism®/Community Organizing Workshop TEN STEPS TO HOSTING

by The People's Institute for Survival and Beyond

The People's Institute's calendar fills up 2-4 months in advance. Please review and consider the following as you prepare to host an Undoing Racism®/Community Organizing Workshop:

Step 1: Become Familiar!

A careful perusal of our websites will answer many questions about the People's Institute, the Undoing Racism™/Community Organizing Workshop and our trainers.

National Office – New Orleans, LA: http://www.pisab.org/

Step 2: Clarify Your Needs

Before hosting an Undoing Racism®/Community Organizing Workshop, it is important for both you and the People's Institute to clarify your needs. Please consider the following:

- Why does your organization or community want to have an Undoing Racism®/Community Organizing Workshop?
- Are there specific concerns that you hope this workshop will address?
- Is there some particular incident, event or pressure that is causing your organization or community to consider hosting a workshop?

Step 3: Identify Your Constituency

- Who is the workshop for?
- Would this workshop be an in-house training, specifically intended for members of your organization? If so, will participants be invited, urged, or required to attend?
- Would this workshop be a collaborative effort, involving two or more organizations, communities, agencies, etc.? If so, what segments of the community will be represented?
- Do you expect that this workshop will be racially mixed? If not, how will you ensure some diversity? Whenever possible, Undoing Racism®/Community Organizing Workshops are done in racially diverse settings. Exceptions are made only in certain circumstances and with prior agreement from the organizers/trainers.

Step 4: Contact the People's Institute

Once you have read through our materials and have given some thought to the above questions, please contact the National Office at 504.301.9292. We will be happy to answer your questions about the People's Institute for Survival and Beyond and the Undoing Racism®/Community Organizing Workshop.

Step 5: Preliminary Consultation

The People's Institute is committed to providing Undoing Racism® training with adequate preparation and follow-up in the local community. We understand the workshop as part of a larger process to strengthen and broaden a movement for social justice and equity and to strengthen your work. Prior to a workshop, we will encourage all sponsoring organizations, especially those that are developing a community coalition, to consider having our trainers meet (via conference call) with key organizing hosts prior to a workshop. We find that this step not only relieves fears and helps answer many questions, but it also increases effectiveness of this workshop. A preliminary meeting offers an excelled opportunity for the People's Institute organizers to understand participants dynamics and intentions of the hosting organization.

Step 6: Access Organizational Finances

EXPENSES:

• Workshop Fee: The basic fee for a 3 day Undoing Racism® workshop is developed in partnership with the host organization. Call us for details regarding your situation.

INCOME

- Grants: General financial support to underwrite the cost of an Undoing Racism® workshop can be sought from:
 - The organizations that are hosting the workshop;
 - Local faith-based organizations, churches, community organizations, businesses, or other groups that are willing to invest in the work of Undoing Racism®. The People's Institute can provide leads on potential funding sources.
 - Scholarship Donations: Individuals who are committed to the work of Undoing Racism®, especially those who might not be able to attend a workshop, can make scholarship donations so that others can afford to attend.

- Registration fees: Registration fees can be calculated to cover the balance of the workshop expense. To determine registration fees, we suggest a sliding scale formula.
- Please note: unless prior arrangements are made with the People's Institute,
 Undoing Racism® workshops are to have no fewer than 15 and no more than 22 participants.

Step 7: Set a Workshop Date

Once your organization decides to host an Undoing Racism® workshop, potential dates can be discussed with the Logistics Coordinator, at the People's Institute. After setting up the date, a Workshop Information Form (WIF) will be emailed. Upon receipt of the completed paperwork, the Administrative coordinator will send a contract and invoice. To secure the date, a 15% non-refundable deposit and the signed contract, is required.

Step 8: Meet with the Trainers

At some point before the scheduled workshop date, workshop hosts/organizers will have a meeting or conference call with the People's Institute trainers assigned to your workshop. The purpose of this meeting is to clarify needs, discuss expectations, establish goals, and develop an agreement for working together. Some groups may find it helpful to take this step prior to making a final commitment to host a workshop.

Step 9: Make Workshop Arrangements

Preparation for Participants: It is very helpful if all participants are aware of the following:

- The purpose of the Undoing Racism®/Community Organizing Workshop. Each participant can be given "The Workshop Overview" as well as the steps to Undoing Racism and our guiding principles.
- The commitment they are making. All participants are asked to commit to the full workshop time and join the meeting on devices that are camera and microphone enabled.
- The cultural sharing time. At some workshops there will be a cultural sharing, time permitting. Participants will appreciate advance notice of this opportunity to share.
- Please dress comfortably and locate yourself in a settled/stationary environment.
- Driving while attending this workshop will not be suitable for attendees of the workshop.

- The workshop schedule. A typical Undoing Racism® workshop runs on a schedule similar to the ones below. There can be variations on start and ending times.
- There will be permitted moments each hour of the workshop to stretch and/or move.

Day One	Day Two	Day Three
10 – 4	10 – 4	10 - 4
9 -3	9-3	9-3

<u>The Meeting Room:</u> Reminders for setting up your zoom meeting:

- Host must be equipped with a zoom account that accommodates the time frame and amount of participants (max 22 people).
- Make sure break rooms and waiting rooms are enabled.
- Identify one person from your team who will transfer host permissions to one of our technical facilitators at least 30 minutes prior to the start of the workshop.

Step 10: Publicity

Please note that all announcements of the Undoing Racism®/Community Organizing Workshop (press releases, ads, brochures, flyers, etc.) must be reviewed by the People's Institute staff BEFORE being released to the general public. We can provide sample materials that may be of assistance.

Other Tasks may include organizing the following: Registration (including receiving and providing receipts for payments)

If you would like to set up a workshop with your organization, please contact:

The People's Institute for Survival and Beyond

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