



BRA/EDIC BOARD OF DIRECTORS FY17 BUDGET PROPOSAL

JULY 14, 2016

Budget & Finance Staff:

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PRESENTATION CONTENTS

- BRA/EDIC Agency FY16 Accomplishments and FY17 Goals and Objectives
- Changes for the FY17 Budget Process
- FY17 Proposed Budgets
 - Combined Agency, BRA, & EDIC three-year Budget Summaries
 - Combined Agency Personnel Trend
- FY17 Agency Capital Spending Schedule and Projected Cash Flow
- Key Department Presentations: FY16 Accomplishments, FY17 Goals and Objectives, FY17 Proposed Departmental Budgets
- Appendix I– Remaining Department FY16 Accomplishments, FY17 Goals and Objectives, FY17 Proposed Departmental Budgets
- Appendix II - FY17 Proposed Agency Budget Detail Tables
 - Combined Agency, BRA, & EDIC three-year Revenue and Expense Detail Tables

BRA/EDIC AGENCY WIDE FY16: ACCOMPLISHMENTS

- Implemented “Action Plan”: Focusing all activities on 1) *professional management*, 2) *elevating and maximizing real estate*, 3) *prioritizing proactive planning*, and 4) *streamlining Article 80*
- Professional Management: Installed special lease administration software called YARDI, and all of the 122 BRA/EDIC leases have been abstracted. As a result of YARDI, \$225,000 in lease fund recovery money has been collected and an additional \$2.1M has been identified for future collection. Annual strategic budgeting, including capital planning, is now in place. Departmental budgets are in place with regular reports to the BRA/EDIC board. Audited financials are posted on the BRA/EDIC website. FY16 performance reviews are nearing completion. A new recruiting system and ADP timesheets software is also now in place.
- Elevating/Optimizing Real Estate: Tentatively designated development teams for three important underutilized sites in the Raymond L. Flynn Marine Industrial Park. (Parcels A, N and Q) Also, began the process of upgrading the China Trade Center for new tenants and continue to improve infrastructure and buildings within the Raymond L. Flynn Marine Industrial Park

BRA/EDIC AGENCY WIDE FY16: ACCOMPLISHMENTS

- **Prioritizing Proactive Planning:** Began the reorganization of the Planning Division, including the reconfiguration of the Urban Design Department, and launched Imagine Boston 2030 (first city-wide planning effort in over 50 years). Three strategic planning area studies are in progress (JP/Rox, South Boston/Dot Avenue and Dudley Square/Roxbury). A fourth strategic planning area has been identified (Glover's Corner) and additional planning areas are expected to be identified.
- **Streamlining Article 80:** Significant progress made in launching Pipeline 2.0, also added electronic document submissions and Zoning Board of Appeal Design Review guidelines. Staff is piloting innovative models for more open, collaborative and inclusive public meetings.
- **Other:** Updated City's Inclusionary Development Policy, launched a standardized application process for the disbursement of community benefits funding

BRA/EDIC AGENCY FY17 GOALS AND OBJECTIVES

BRA Mission Statement:

In partnership with communities, the BRA plans Boston's future while respecting its past. By guiding physical, social and economic change in Boston's neighborhoods and its downtown, the BRA seeks to shape a more prosperous, resilient, and vibrant city for all.

BRA/EDIC Operational Goals and Objectives FY17:

- Create value for all agency stakeholders through improved internal and external transparency
- Maximize BRA/EDIC real estate opportunities to generate increased and new revenue
- Streamline and improve internal business operations and develop standard operating procedures and processes

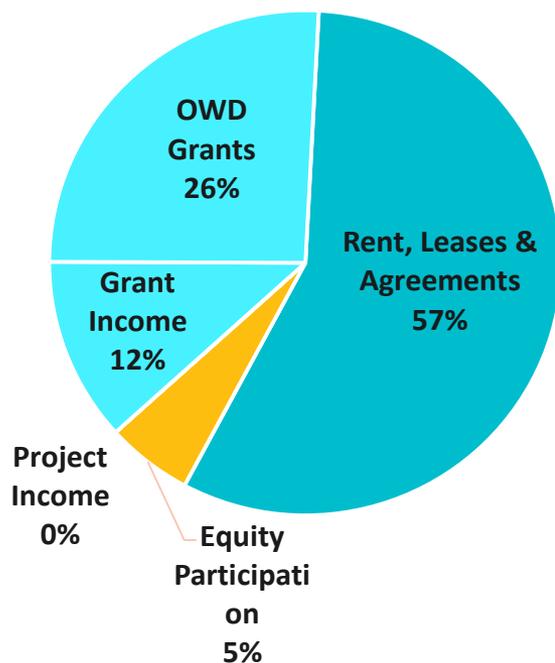
CHANGES FOR FY17 BUDGET PROCESS

- **GOAL: Increase the level of detail in the budget presentation**
 - Combined Agency budget and budgets by company
 - Tabular presentation of budgets with multi-year trend at summary and mid-level of detail (appendix) as well as a multi-year look at personnel by department
 - Line-item FY17 budgets for each department, more detail on capital projects/costs, and detail on Agency cash position
- **GOAL: Increase focus on long-term planning**
 - Mid-range capital plan while long-term plan is being developed
 - 12 quarter rolling projected cash flow
- **GOAL: Develop the budget for use as a fiscal management tool**
 - Hired Budget & Procurement Manager (Michelle Goldberg)
 - Meetings with all department heads, both for budget development and as prep for quarterly discussions throughout the fiscal year
 - Reorganized department budgets (ex. MIS, Administrative Services, Compliance, Development Review)
 - Reviewing financial software to link Budget/Procurement/General Ledger processes
 - Establishing future goals to develop position numbers, project codes, and use account codes more to manage to the budget

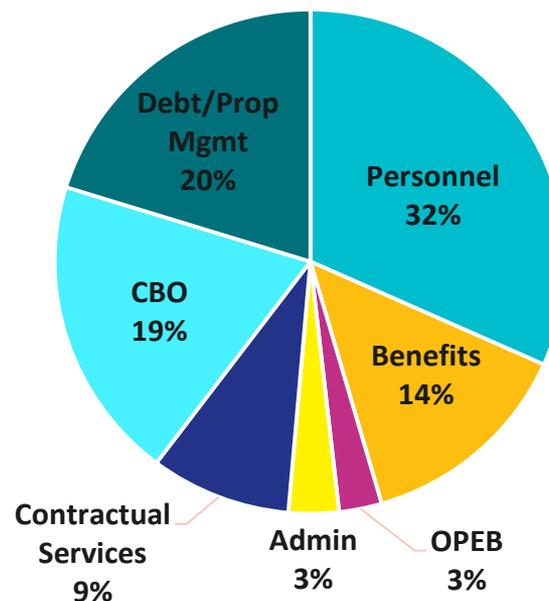
FY17 COMBINED BUDGET REVENUE & EXPENSES

- Major revenue sources include – Rental, Lease & Agreement income, Equity Participation, and Grants (OWD/intercompany)
- Major expenses include – Personnel, Benefits, Community-based Organization (CBO), Debt/Property Management, and Contractual Services

Revenue \$62.2M



Expenses \$61.6M



BRA/EDIC: FY17 COMBINED BUDGET HIGHLIGHTS

- **FY17 Budget Expenses total \$61.6M – an increase over FY16 Estimate of \$3.2M, or 5.5%**
 - Personnel and Benefits combined increase by \$2.2M or 7.9%
 - Hiring for 16 positions -12 new, 4 vacancies carried from FY16 (\$736k incl. fringe)
 - 2.5% Merit/COLA increase included (\$590k including fringe)
 - Funding of OPEB liability of \$1.7M (in addition to \$4.1M in funding for FY16)
 - Special projects spending of \$3.0M: Continuum Update, ImagineBoston 2030
- **FY17 Budget Revenue totals \$61.6M – an increase over FY16 Estimate of \$3.6M, or 6.1%**
 - Income from Rentals, Leases & Agreements increases by \$5.1M, or 16.9%
 - EDIC: Zoom Group lease, Parcels A & Q1, parking. BRA: China Trade leases
 - Income from all other sources decreases by \$1.5M, or 5.4%
- **FY17 Operating Surplus projected at \$588K**
- **FY17 Capital Budget/Cash Flow (non-operating)**
 - Capital spending of approximately \$18M : China Trade, CNY maritime infrastructure, RLFMIP garage repairs, Pipeline 2.0 and a reserve
 - FY17 Cash “crunch”

FY17 COMBINED BUDGET SUMMARY (\$000'S)

COMBINED BRA/EDIC OPERATING BUDGET SUMMARY	FY 15 ACTUAL	FY 16 ESTIMATE	FY 17 BUDGET
OPERATING REVENUE:			
RENTAL, LEASES & AGREEMENTS	29,592	30,345	35,476
EQUITY PARTICIPATION	3,125	3,804	3,400
PROJECT INCOME	-	334	-
GRANT & OTHER INCOME	20,351	24,166	23,364
TOTAL REVENUE	\$ 53,068	\$ 58,648	\$ 62,239
OPERATING EXPENSES:			
PERSONNEL	16,937	18,524	19,542
EMPLOYEE BENEFITS	8,101	9,016	10,176
ADMINISTRATIVE	969	1,171	1,958
CONTRACTUAL SERVICES	15,584	14,712	17,503
PROPERTY MANAGEMENT/DEBT SERVICE	11,815	15,033	12,471
TOTAL EXPENSE	\$ 53,407	\$ 58,455	\$ 61,651
REVENUES OVER (UNDER) EXPENSES	\$ (339)	\$ 194	\$ 588

FY17 BRA BUDGET SUMMARY (\$000'S)

BRA OPERATING BUDGET SUMMARY	FY 15 ACTUAL	FY 16 ESTIMATE	FY 17 BUDGET
OPERATING REVENUE:			
RENTAL, LEASES & AGREEMENTS	10,921	11,272	12,143
EQUITY PARTICIPATION	1,925	2,411	2,200
PROJECT INCOME	-	334	-
GRANT & OTHER INCOME	4,485	6,667	6,788
TOTAL REVENUE	\$ 17,331	\$ 20,684	\$ 21,130
OPERATING EXPENSES:			
PERSONNEL	7,292	7,892	7,763
EMPLOYEE BENEFITS	5,065	5,161	5,980
ADMINISTRATIVE	534	506	556
CONTRACTUAL SERVICES	1,710	1,830	3,870
PROPERTY MANAGEMENT/DEBT SERVICE	2,285	2,759	2,846
TOTAL EXPENSE	\$ 16,886	\$ 18,147	\$ 21,014
REVENUES OVER (UNDER) EXPENSES	\$ 445	\$ 2,537	\$ 116

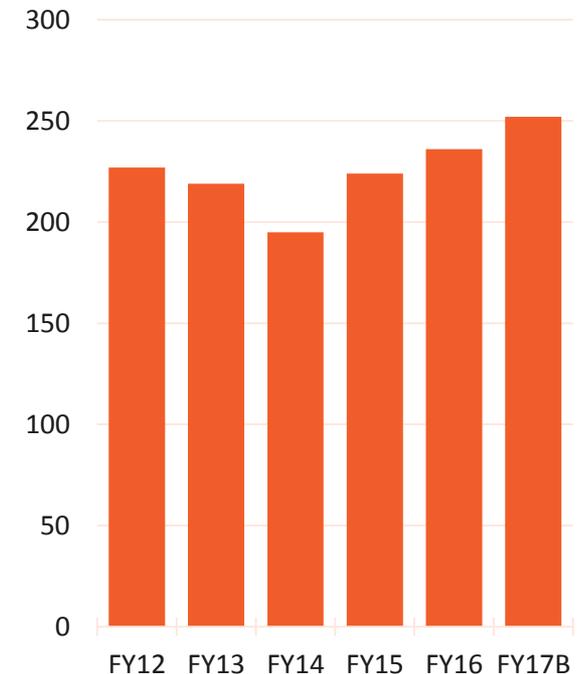
FY17 EDIC BUDGET SUMMARY (\$'000'S)

EDIC OPERATING BUDGET SUMMARY	FY 15 ACTUAL	FY 16 ESTIMATE	FY 17 BUDGET
OPERATING REVENUE:			
RENTAL, LEASES & AGREEMENTS	18,671	19,073	23,333
EQUITY PARTICIPATION	1,201	1,392	1,200
PROJECT INCOME	-	-	-
GRANT & OTHER INCOME	15,866	17,499	16,576
TOTAL REVENUE	\$ 35,738	\$ 37,964	\$ 41,109
OPERATING EXPENSES:			
PERSONNEL	9,645	10,632	11,780
EMPLOYEE BENEFITS	3,036	3,855	4,196
ADMINISTRATIVE	435	665	1,402
CONTRACTUAL SERVICES	13,874	12,882	13,634
PROPERTY MANAGEMENT/DEBT SERVICE	9,531	12,274	9,625
TOTAL EXPENSE	\$ 36,521	\$ 40,308	\$ 40,637
REVENUES OVER (UNDER) EXPENSES	\$ (783)	\$ (2,344)	\$ 472

FY17 COMBINED HEAD COUNT BY DEPARTMENT

Department Name	FY15 Actual Head Count	FY16 Actual Head Count as of June 30 2016	FY17 Approved New Hires/Posted Vacancies*	FY17 Proposed Head Count
Director's Office	18	20	0	18
Secretary's Office	2	3	0	3
Planning and Zoning	34	40	5	45
Real Estate	20	18	4	23
BLDC & BIDFA*	2	2	0	2
Union	13	14	0	14
Research	7	7	1	8
Legal	10	11	2	13
Admin. and Finance	17	20	3	22
Board	5	5	0	5
MIS	14	16	1	17
Compliance	12	12	0	12
Development Review	12	12	0	15
Office Workforce Dev.	56	54	0	53
Admin Services	2	2	0	2
Grant Total:	224	236	16	252
Employee Service Contracts	24	31	0	31

*Does not include transfers between departments



FY17 CAPITAL SPENDING SCHEDULE AND PROJECTED CASH FLOW

FY17 APPROVED CAPITAL EXPENDITURES

Agency Capital Projects FY17

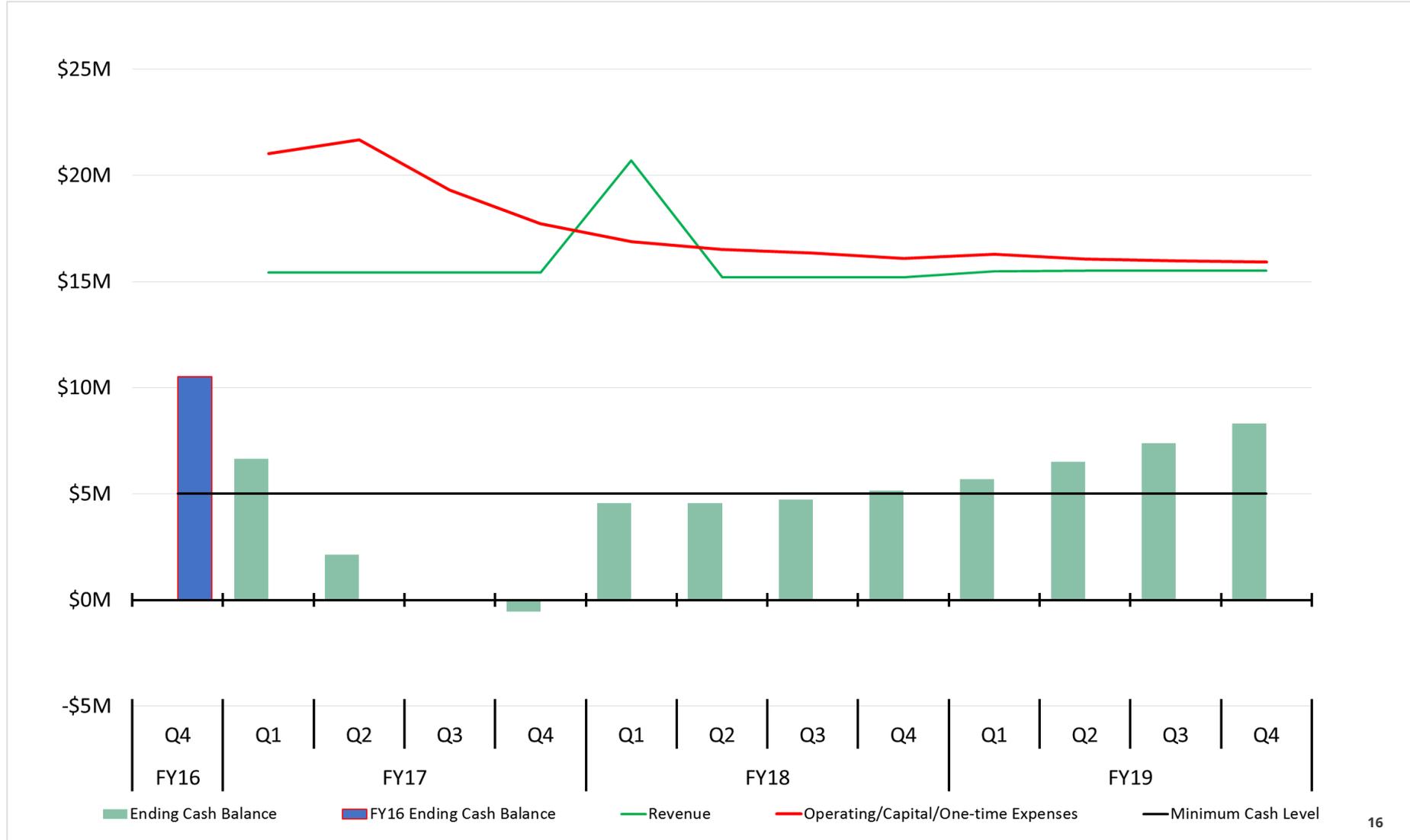
Category	Status	Total Project Cost	Estimated FY17 Cost	Funding Source	
				Agency	City
Management Information Services					
Pipeline 2.0 Project	Active	\$ 175,000	\$ 175,000	\$ 175,000	\$ -
	Sub-total	\$ 175,000	\$ 175,000	\$ 175,000	\$ 175,000
BRA - China Trade					
Base Building Improvements	Active	6,452,115	2,030,000	2,030,000	-
Tenant Improvements (floors 2-6)	Active	5,718,675	4,164,000	4,164,000	-
Real Estate Broker Fees (floors 2-6)	Active	2,090,000	1,815,000	1,815,000	-
	Sub-total	\$ 14,260,790	\$ 8,009,000	\$ 8,009,000	\$ -
BRA - Charlestown Navy Yard					
Maritime Infrastructure	Active	2,622,000	1,325,000	-	1,325,000
Other CNY Projects		275,000	275,000	275,000	-
	Sub-total	\$ 2,897,000	\$ 1,600,000	\$ 275,000	\$ 1,325,000
BRA - Other Property					
Long Wharf - Granite reset/masonry	Active	\$ 225,000	\$ 225,000	\$ 225,000	\$ -
	Sub-total	\$ 225,000	\$ 225,000	\$ 225,000	\$ -
EDIC - RLF Marine Park					
12 Channel Elevator/Garage Elevator	Active	2,830,000	927,000	927,000	-
Park-wide Expenses	Active	240,000	240,000	240,000	-
V01 Bulkhead & Pier 5 Cofferdam	Active	2,800,000	2,524,000	124,000	2,400,000
Black Falcon/Terminal St resurfacing	Active	1,550,000	1,550,000	150,000	1,400,000
MIP Street Lighting	Active	880,000	880,000	95,000	785,000
Broker Fees (Parcels A, N, Q1)		1,575,000	1,575,000	1,575,000	-
	Sub-total	\$ 9,875,000	\$ 7,696,000	\$ 3,111,000	\$ 4,585,000
Contingency - Agency Wide					
Contingency for capital projects		930,719	654,285	654,285	
	Totals	\$ 28,188,509	\$ 18,184,285	\$ 12,274,285	\$ 5,910,000

FY17 PENDING CAPITAL PROJECTS

Agency Capital Projects FY17 - PENDING APPROVALS/FUNDING

				<i>Eventual Funding Source</i>	
	Status	Total Project Cost	Estimated FY17 Agency Amount	Agency	City
BRA - China Trade					
Windows and Freight Elevator	Pending	2,385,000	-	2,385,000	-
EDIC - RLF Marine Park					
MIP - Street Lighting retrofit	Pending	83,000	43,000	43,000	-
22 Drydock - Mechanical Systems	Pending	450,000	-	450,000	-
BRA - Charlestown Navy Yard					
Repoint and seat brick of Portico pavilion	Pending	140,000	-	140,000	-
Public Infrastructure Engineering Study	Pending	1,800,000	-	1,800,000	-
BRA - Other Property					
Long Wharf and Charlestown		585,000	-	585,000	-
Contingency - Agency Wide					
Contingency for capital projects		440,505	1,505	1,505	-
Totals		\$5,883,505	\$ 44,505	\$ 5,404,505	\$ -

COMBINED AGENCY CASH FLOW PROJECTION: FY17 CASH "CRUNCH"



QUESTIONS?

BRA/EDIC FY17 DEPARTMENT PRESENTATIONS

- Administration & Finance – Finance & Budget, Human Resources, & Financial Services (Chris Giuliani)
- Real Estate– Leasing, Operations, Asset Management & Construction (Ed O’Donnell)
- Management & Information Services (Michael O’Shea)
- Planning Division– Planning, Zoning, Urban Design & Community Engagement (Sara Myerson)
- Mayor’s Office of Workforce Development (Midori Morikawa)
- Included in Appendix – Legal, Research, Development Review, Compliance and Administrative Services, and Leadership (Board, Secretary and Director’s Office)

ADMINISTRATION AND FINANCE OVERVIEW

- Administration & Finance is comprised of the Human Resources, Budget & Finance, and Financial Services/Fiscal Compliance teams. As a department, A&F seek to support the mission by strategically managing the Agency's resources of both human and financial capital.
 - Administration & Finance:
 - Interacts daily with all departments either in a human resource or fiscal capacity
 - Manages and accounts for all Agency funds
 - Aids in the procurement of goods & services
 - Contributes on all fiscal matters

ADMINISTRATION & FINANCE: FY16 ACCOMPLISHMENTS

- Reorg of Finance team: Director of Finance, Fiscal Compliance (Deputy Director of Financial Services), Budget & Procurement Manager positions hired. Acting Controller named. Controller and Accountant positions posted.
- Changes to annual budgeting processes; more inclusive approach for department heads in development and management of budget throughout the year;
- Refined Long-term Cash Flow and began mid-term operating and capital budget planning;
- HR system upgrades (Time Reporting/Recruiting System) & Employee Performance Review Process
- “Yardi” system for fiscal compliance: Reviewing all leases for compliance with terms, collected additional rents, reduced outstanding receivables
- Banking reform: consolidated bank accounts, fully collateralized deposits, earning return on checking accounts, reduced banking fees, increased interested revenue
- Reserving funds for long-term liabilities (\$4.1M invested with PRIT for OPEB)
- Developing long-term plans for asset management (Capital plan this fall; BMIP, CNY infrastructure needs), investing in current assets (China Trade)
- Audited financials and budget are available on Agency website
<http://www.bostonredevelopmentauthority.org/about-us/departments/administration>

ADMINISTRATION & FINANCE: FY17 GOALS AND OBJECTIVES

Overall

- Engage across the Agency to aid in improving all financial transactions and practices to produce the best possible outcomes for the long-term success of the Agency and its mission

Budget & Finance

- Continue to improve on budget process by using enhanced software to integrate budget process into financial processes (accounts payable, procurement), develop a robust budget training program, produce budget to actual reports including quarterly variance reporting
- Develop a monthly checklist and closing process to ensure timely and accurate financial data, produce reports to assist with reconciliations, etc.
- Process all OWD grant budgets for revenue/expense comparisons and develop reports for internal/external needs
- Maximize funding by conducting OWD financial monitoring and training staff on electronic state drawdown procedure.
- Review and update Finance processes and policies

ADMINISTRATION & FINANCE: FY17 GOALS AND OBJECTIVES

Human Resources

- Streamline HR processes and procedures, continue to improve recruitment, orientation, onboarding, and off boarding
- Continue to update Performance Evaluation process, upgrade HRIS software and conduct an internal department audit
- Increase employee engagement and professional development, review and revise HR policies

Financial Services (Fiscal Compliance & Lease Administration)

- Maintain and develop reports to proactively manage lease portfolio
- Continue to review leases and assess Agency land for revenue opportunities
- Audit lease development in order to implement standardized lease language in the Agency lease portfolio

ADMINISTRATION AND FINANCE

		<i>FY17 Budget</i>
PERSONNEL		
5005 Salaries and Wages - FTE		1,632,234
Overtime (not calculation for fringe/benefits)		-
Paid Interns		-
Employment Service Contractors		138,000
Salary increases - Merit/COLA		-
Sub-Total		\$ 1,770,234
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		241,392
5105-5115 Pension Contributions		425,964
5145 Actuarial Health Expense		1,665,500
5130 Workmen's Compensation		8,034
Employment Service Contractors		24,840
Salary increases - Merit/COLA fringe		-
Sub-Total		\$ 2,365,730
ADMINISTRATIVE EXPENSE		
6005 Advertising		-
6040 Data Processing		20,000
6010 Employee Education		6,780
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		8,000
6025 Office and Copy Supplies		5,000
6030 Postage		-
6050 Printing		-
6065 Subscriptions		-
6035 Telephone Services		-
6060 Travel/Administrative		-
6070 Bank Fees		65,000
Sub-Total		\$ 104,780
CONTRACTUAL SERVICES		
7005 Administration and Finance		227,200
7010 Legal		73,825
7015 Planning and Economic Development		-
Sub-Total		\$ 301,025
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		-
8180 Insurance		-
8185 Transportation		-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		4,519,464
Sub-Total		\$ 4,519,464
GRAND TOTAL		\$ 9,061,233

REAL ESTATE OVERVIEW

- The mission of the Real Estate Department is to maximize the use and value of the BRA/EDIC's physical assets as a means of supporting the agency's planning initiatives and ongoing operations. The Department seeks to realize this mission by:
- Efficiently and effectively managing long term, performing assets such as the Charlestown Navy Yard and the Raymond L. Flynn Marine Park
- Forming a supportive and mutually beneficial relationship with tenants and shared interest holders
- Insuring that ongoing rent and transaction fees, as determined by lease and license arrangements, are collected and that parking revenues reflect market conditions and demand
- Maintaining the aesthetic appeal of open spaces
- Working with other departments and City agencies to create a community based process to dispose of underutilized properties scattered among different neighborhoods and urban renewal areas.

REAL ESTATE: FY16 ACCOMPLISHMENTS

- Commenced more robust Property Opportunities Meetings and developed plans for sales / disposition / transfer of properties
- Improved management of parking lots
- Collected over \$250K in previously unbilled rent and identified \$2.1M in previously unidentified future rent
- Commenced monthly Accounts Receivable meetings with Finance and began to charge tenant's late fees

REAL ESTATE: FY17 DEPARTMENT GOALS AND OBJECTIVES

Goals:

- Complete long term Capital Improvements and Maintenance
- Move toward multiyear/option to renew contracts for maintenance and service work
- Manage and expedite the disposition of BRA owned property through a community based process;
- Complete rehabilitation and leasing efforts for China Trade Center

Objectives:

- Undertake and complete waterside infrastructure improvements at CNY and RLFMP, along with continuing investment in 12 Channel Street
- Maintain and improve tenant relationships
- Reduce current non-designated/performing assets by 10% before 6/30/2017; Complete accessible holdings list not <95% accuracy by 6/30/2017
- Achieve full occupancy of China Trade by 6/30/2017
- Complete improvements to Piers 4,10, and 11 at CNY and Pier 5 at RLFMP by 6/30/2017
- Present long term capital improvements plan to Board of Directors for consideration by 12/31/2016

REAL ESTATE

		<i>FY17 Budget</i>
PERSONNEL		
5005 Salaries and Wages - FTE		2,570,759
Overtime (not calculation for fringe/benefits)		100,000
Paid Interns		-
Employment Service Contractors		-
Salary increases - Merit/COLA		-
Sub-Total		\$ 2,670,759
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		399,820
5105-5115 Pension Contributions		701,248
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		12,290
Employment Service Contractors		-
Salary increases - Merit/COLA fringe		-
Sub-Total		\$ 1,113,358
ADMINISTRATIVE EXPENSE		
6005 Advertising		81,000
6040 Data Processing		40,000
6010 Employee Education		5,932
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		12,000
6025 Office and Copy Supplies		8,675
6030 Postage		-
6050 Printing		-
6065 Subscriptions		10,449
6035 Telephone Services		-
6060 Travel/Administrative		9,446
6070 Bank Fees		273,000
Sub-Total		\$ 440,502
CONTRACTUAL SERVICES		
7005 Administration and Finance		-
7010 Legal		-
7015 Planning and Economic Development		650,000
Sub-Total		\$ 650,000
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		6,003,000
8180 Insurance		466,305
8185 Transportation		28,000
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		978,160
Sub-Total		\$ 7,475,465
GRAND TOTAL		\$ 12,350,084

MIS OVERVIEW

Mission: The Management Information Services department's mission is to provide technology leadership, expertise and services that help the agency fulfill its mission and achieve its business goals.

Goals and Objectives

Efficiency & Effectiveness

- Leverage existing, emerging, and innovative technologies to enhance, improve, and streamline business processes.

Transparency

- Commitment to initiatives that promote accountability and provide constituents information on what we are doing

Accessibility

- Enable customers (internal/external) to access the information they need, when and where they need it.

Service Delivery

- Meet or exceed customer expectations for technology.

Engagement

- Develop relationships with city departments and community based organizations in regards to innovation.

MIS FY16 ACCOMPLISHMENTS

- Implemented a new eDiscovery platform to improve the overall turn-around time for FOIAs
- Added new features to the Zoning Viewer (Guided Tour, Tool Tips)
- Added new features to the RFP portal to allow users to view all respondents, as well as enabling external users of the website to submit public comments
- Enhanced use of tech throughout agency such as: WIFI, flat screens, PCs, phones, and Skype accounts to make meetings more efficient and effective.
- Launched the Agencies first ever Cyber security Awareness Training Program
- Created a stand-alone web presence for the OWD Adult Literacy Initiative
- Northern Ave Bridge Contest Web Presence
- Imagine Boston Web Site

MIS FY17 GOALS AND OBJECTIVES

Goals:

- Better Management of LDAs
- Better Management of BRA Owned Land
- Better Management of the Development Review Pipeline

Objectives:

- Digitize and make all LDAs easily searchable via OCR
- Replace old BRA owned land management system with new solution
- Build out new Development Pipeline in Salesforce (8-10 weeks)

PIPELINE 2.0

Current System

- Overwhelming user interface
- No triggers, workflows, or automation
- Lack of integration with other BRA/City systems
- Limited metrics, reporting, and dashboarding capabilities
- No auditing capabilities

Completed Preliminary Analysis

- Met with 9 BRA Departments and 35+ staff
- Gathered 250+ Requirements
- Held meetings with other City Departments to discuss integration
- Examined existing solutions

Next Steps

- Finalize business requirements
- Develop functional requirements
- Determine time, budget and technical proficiency
- Decide on "Buy vs. Build"

PROJECTS

Display Project Info Save Edit Undo Manage Contacts Close Project

Project Name 100 Arlington Street Entered 10/6/2009
 Project Manager Phil Cohen x Last Edited 6/5/2015
 Display on Web Category Construction Complete Photo Project ID 1416 Docs

PROJECT BASICS Lat: 42.349913 Lon: -71.069451

PROJECT ADDRESS Bay Village
 StNum/Name 100 Arlington Street
 Neighborhood Bay Village
 Parcel ID # 0500805000 Additional Parcels

Project Name 100 Arlington Street
 Project Cost \$65,000,000
 Inst Master Plan
 Developer The Congress Group

DEVELOPMENT PROGRAM

Office Residential
 Hotel Rental
 Retail Ownership
 R & D
 Parking Dormitory
 Industrial Educational
 Institutional Cultural
 Medical Clinical Other Type
 Medical Research
 Other Research

Contact Name
 Title
 Mailing Address
 Phone Number
 eMail Address

Total Residential Units 128
 Number Dorm Beds
 Number Hospital Beds

PLANNING AND ZONING

Zoning District Bay Village Neighborhood District
 Zoning Classification Business: Neighborhood Services
 Zoning Comment
 Harbor Plan PDA Master Plan Inst. Master Plan
 Zoning Relief Sought ZBA BZC
 Empowerment Zone U District PDA EDA 121A
 Urban Renewal Area
 URA Modification

Land Sq Ft 15,796 Calculate FAR
 Gross SF of Dev. 165,690 FAR
 Estimated FAR 10.49
 Number of Bldgs. 1 Project Use Detail
 Parking Spaces 0
 At Grade Spaces 0
 Structured Spaces 0 Building Details
 Below Grade Spaces 0
 Non Accessory Sqft 0

PROJECT BENEFITS Retained Jobs 0
 DIP Project New Jobs 0

HOUSING TRACKING Housing Details
 BRA Disposition

PIPELINE 2.0 - DASHBOARD

Development Projects

Find a dashboard...

Edit Clone Refresh As of Today at 8:52 AM

Create multiple dashboards

Drill into dashboard components

Edit dashboards to change layout, graphics

Projects By Neighborhood



Record Count

Neighborhood: Neighborhood Name

- Bay Village
- Downtown
- Fenway
- Roslindale
- Roxbury

Completed Projects

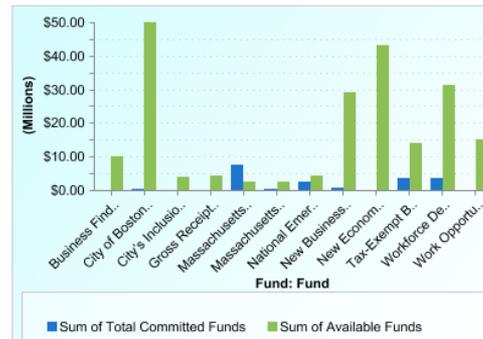
Project Name	Average Stage Duration
Jones Building Corp-60K	427
Opportunity Resources Inc - 40K	248
Steam Power Company - 50K	240
Distributing-70K	150

...moving report! (Projects > 90 Days at the Same Stage)

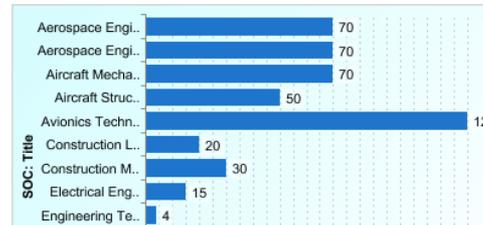
Monetary Contribution by Segment



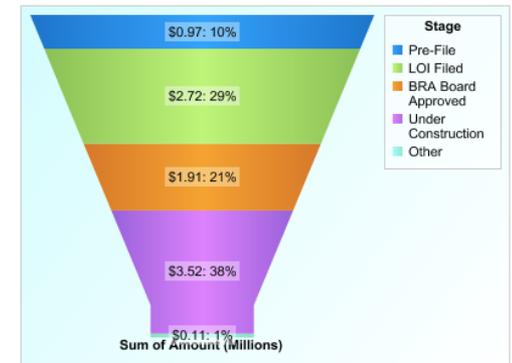
Monetary Contributions to Funds



Jobs Promised



Project Pipeline



Target Pipeline is 3 times your Quota

Average Project Age by PM

Project Manager	Average Age
Christine Ryan	0
Richard Shapiro	14
Peter Packaging	261
Bernice Whaley	427
Bill West	427

PIPELINE 2.0 - REPORTING

View report details

Filter reports by date, etc.

Export and Print data in the report

Summarize information by: Neighborhood: Neighborhood Name

Time Frame

Date Field: Completion Date

Range: Custom

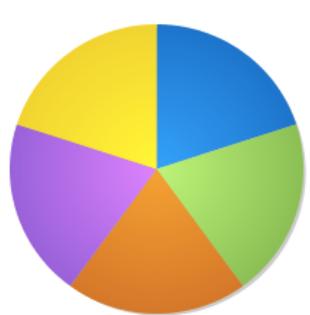
From: To:

Show: All development projects

Project Status: Any Probability: All

Run Report
Hide Details
Customize
Save
Save As
Delete
Printable View
Export Details
Subscribe

Edit [Large](#) | [Medium](#) | [Small](#)



**Neighborhood:
Neighborhood
Name**

- Bay Village
- Downtown
- Fenway
- Roslindale
- Roxbury

Record Count

Grouped By: Neighborhood: Neighborhood Name

Sorted By: Neighborhood: Neighborh... ↑

Project Name	Project Record Type	Type	Stage	Developer Name ↑
<input type="checkbox"/> Neighborhood: Neighborhood Name: Bay Village (1 record)				
100 ARLINGTON STREET	Large	Article 80 basic	BRA Board Approved	AB Partners, Inc.
<input type="checkbox"/> Neighborhood: Neighborhood Name: Downtown (1 record)				
104 Canal Street	Article 80	Article 80 basic	Pre-File	Big Sky & Sons
<input type="checkbox"/> Neighborhood: Neighborhood Name: Fenway (1 record)				

PIPELINE 2.0 – VIEW PROJECT INFORMATION

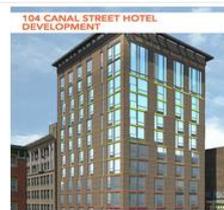
▼ Status



View current project status

Project Name 104 Canal Street

Picture



View desired project details, such as Sq Feet

Description New Hotel in the downtown area
 Project Manager [Christine Ryan \[Change\]](#)
 Project ID 989898
 Age 0.00
 Type Article 80 basic
 Next Step
 Usage Type Hotel
 Developer Name [Big Sky & Sons](#)
 of parking space 200

Stage Pre-File
 Project Status Indicator ●●●
 Completion Date 10/10/2016
 Land Sq Feet 3598
 Building Size 47355
 Neighborhood Downtown
 Address of Construction 104 Canal St, Boston, Massachusetts, 02114
 Location 42°21'52"N 71°3'36"W

View project location on a map



PIPELINE 2.0 – CONTRIBUTIONS & COMMITMENTS

▼ Compliance Summary

Jobs Promised 10
Jobs Created 0
Employment Objective Achieved 0.00%

Expose monetary and non-monetary commitments

Total Promised Monetary Contribution \$10,000.00
Total Paid Contributions \$0.00
Contribution Payments Outstanding \$10,000.00

System Information

Monetary Contributions

New Monetary Contribution

Monetary Contributions Help ?

Action	Monetary Contribution: Number	Fund	Promised Contribution	Contribution Paid	Payment Due Date	In Arrears?
Edit Del	I-000046	City of Boston New Jobs Infrastructure Fund	\$25,000.00	\$7,500.00	8/1/2014	✓
Edit Del	I-000047	Massachusetts Strategic Fund - Capital Investment	\$12,500.00	\$8,500.00	10/1/2014	✓
Edit Del	I-000048	Massachusetts Strategic Fund*	\$17,500.00	\$2,500.00	11/1/2014	✓
Edit Del	I-000049	City's Inclusionary Development Policy Fund		\$0.00	12/1/2014	✓
Edit Del	I-000050	City's Inclusionary Development Policy Fund		\$0.00	1/1/2015	✓

Show performance against commitments

Occupational Demands

New Occupational Demand

Occupational Demands Help ?

Action	Occupational Demand: Company Title	SOC Code	Job Retention	FTE	PTE
Edit Del	ABC Construction	47-2061	<input type="checkbox"/>	10	0
Edit Del	Acme	11-9021	<input type="checkbox"/>	10	0

Negotiated Benefits

New Negotiated Benefit

Negotiated Benefits Help ?

Action	Negotiated Benefit: Number	Negotiated Benefit: Created By	Benefit Name	Target
Edit Del	0015	Christine Ryan, 8/20/2014 4:52 PM	New Green Space	Citizen

Permits

New Permits

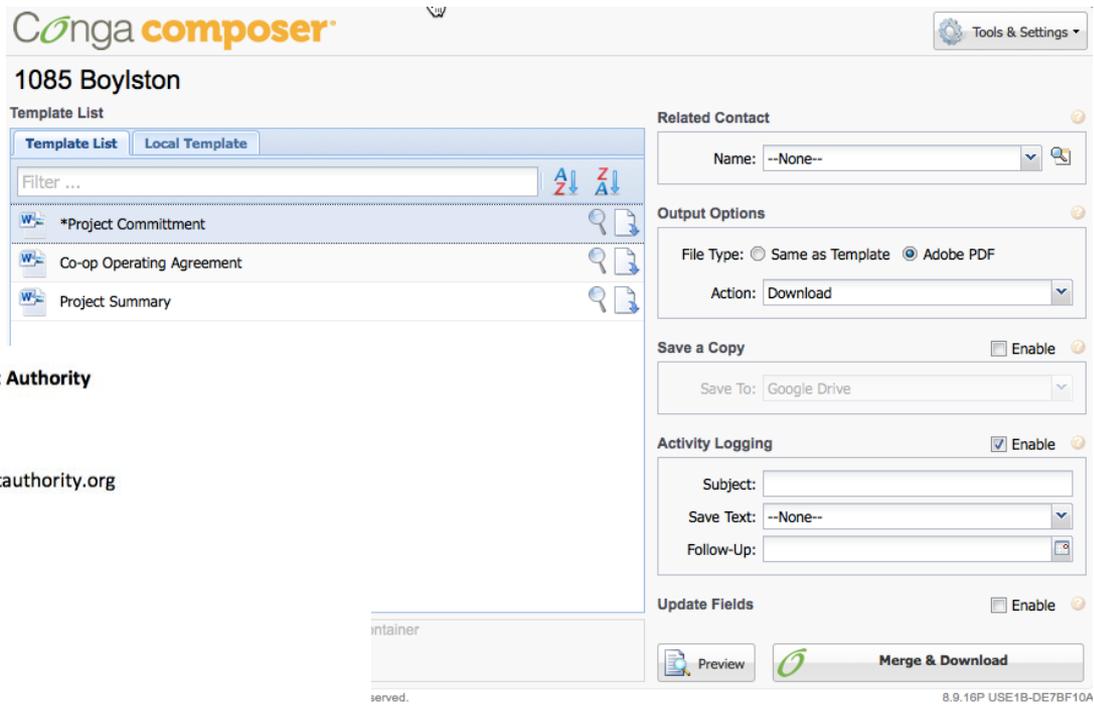
Permits Help ?

Action	Permits Name	Permit Status	Permit Applied Date	Permit Issued Date
Edit Del	Electrical	Applied	10/7/2015	

Expose permit information

PIPELINE 2.0 – DOCUMENT GENERATION

**Generate Documents
with data in
Salesforce**



Boston Redevelopment Authority
One City Hall Square
Boston, MA 02201
P: (617) 722-4300
bostonredevelopmentauthority.org

October 20, 2015

Big Sky & Sons
6039 E Northwest Hwy
Dallas, TX 75225

Project Commitment for 1085 Boylston

In this commitment letter, we have included additional information about the funds we have as business incentives for Big Sky & Sons.

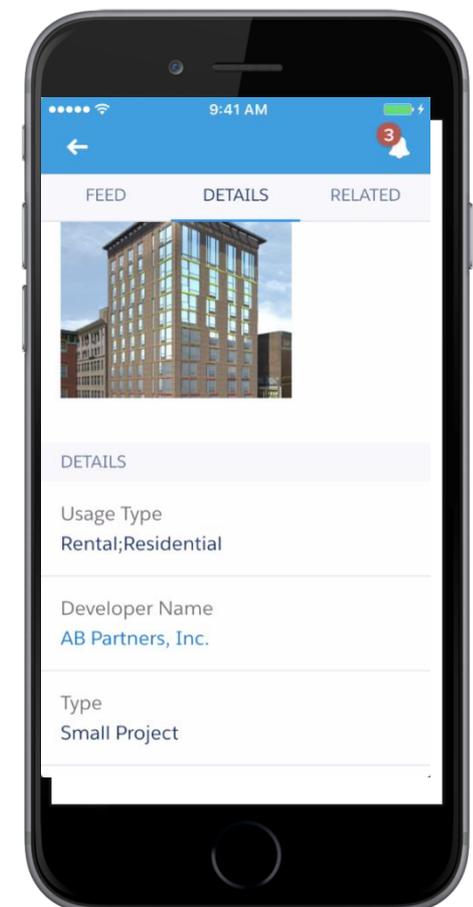
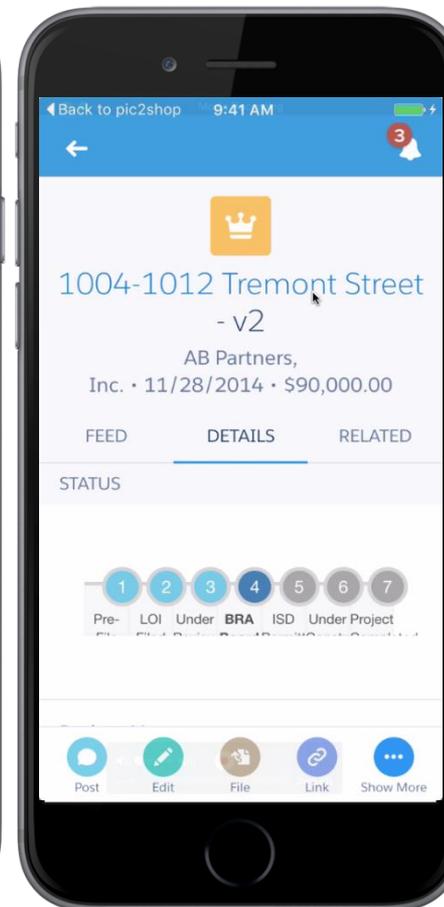
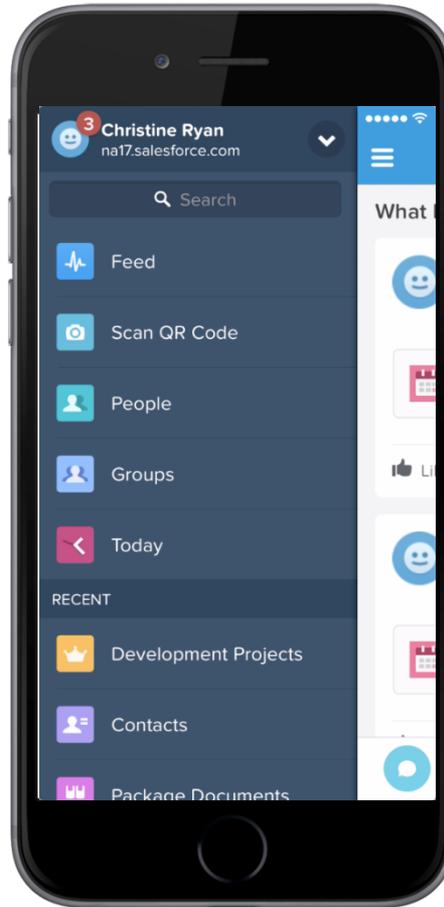
Program Area	Promised Contribution	Contribution Paid
City's Inclusionary Development Policy Fund Program Code: CIDD-	\$5,000	\$0
City's Inclusionary Development Policy Fund Program Code: CIDD-	\$5,000	\$0

**Ability to create an
activity or update the
project**

PIPELINE 2.0 - MOBILE

24/7 access
Anytime/Anywhere

Update information
from mobile device



PIPELINE 2.0 – DEVELOPER VIEW

Give developers
visibility into their
projects

Empower developers
to update projects
and add documents

Collaborate better
with developers

The screenshot displays the '1085 Boylston' project page in the Pipeline 2.0 Developer View. The page includes a navigation bar with 'Chatter', 'Development Projects', and 'Home'. Below the navigation, there are tabs for 'Feed' and 'Details'. A summary bar shows 'Contact Roles (0)', 'Project Comments (1)', 'Google Docs, Notes, & Attachments (1)', and 'Package Documents (2)'. The 'Development Project Detail' section features buttons for 'Edit', 'Submit for Approval', and 'Create Project Documents'. A 'Status' section shows a progress bar with five stages: 1. Pre-File, 2. LOI Filed, 3. Under Review, 4. BRA Board Approved (highlighted), and 5. ISD Permitting. Below the progress bar, project details are listed: Project Name (1085 Boylston), Project Manager (Peter Packaging), Project ID (987657), Square Footage, and Age (8.00). A 'Details' section at the bottom shows Usage Type (Rental; Residential), Developer Name (Big Sky & Sons), Land Sq Feet (708), Building Size (288), and Address of Construction (108).

MANAGEMENT INFORMATION SERVICES (MIS)

		<i>FY17 Budget</i>
PERSONNEL		
5005	Salaries and Wages - FTE	1,134,853
	Overtime (not calculation for fringe/benefits)	-
	Paid Interns	-
	Employment Service Contractors	78,800
	Salary increases - Merit/COLA	-
Sub-Total		\$ 1,213,653
EMPLOYEE BENEFITS		
5120-5125	Life/Health Insurance	185,838
5105-5115	Pension Contributions	324,007
5145	Actuarial Health Expense	-
5130	Workmen's Compensation	5,253
	Employment Service Contractors	14,184
	Salary increases - Merit/COLA fringe	-
Sub-Total		\$ 529,282
ADMINISTRATIVE EXPENSE		
6005	Advertising	-
6040	Data Processing	151,000
6010	Employee Education	4,520
6015	Graphic Design	26,000
6045	Leased Office Equipment	66,200
6020	Mapping & Model Supplies	-
6055	Marketing	-
6025	Office and Copy Supplies	-
6030	Postage	-
6050	Printing	33,000
6065	Subscriptions	-
6035	Telephone Services	80,000
6060	Travel/Administrative	-
6070	Bank Fees	-
Sub-Total		\$ 360,720
CONTRACTUAL SERVICES		
7005	Administration and Finance	-
7010	Legal	-
7015	Planning and Economic Development	-
Sub-Total		\$ -
PROPERTY MANAGEMENT		
803X	Building & Land Maintenance	-
8180	Insurance	-
8185	Transportation	-
80XX	Bad Debt (A&F) / Utilities & Bonds (ECD)	-
Sub-Total		\$ -
GRAND TOTAL		\$ 2,103,655

PLANNING DIVISION OVERVIEW

- The Planning Division's mission is to create places that are livable, ecologically sensitive and economically thriving, The team:
 - Works collaboratively with community members, other local stakeholders and government departments to develop shared visions for the future
 - Creates plans, provides planning and design guidelines and develops regulation that establish a predictable and appropriate context for growth while respecting Boston's historic character and future aspirations
- This mission is carried out through the division's main responsibilities related to (i) proactive long-range planning, (ii) development of design guidelines, (iii) drafting of zoning, and (iv) participation in development and design review
- The team collaborates across disciplines, including: Community Planning, Urban Design, Waterfront Planning, Infrastructure Planning, Climate Change & Sustainability, Zoning & Regulation

PLANNING DIVISION: FY16 DEPARTMENT ACCOMPLISHMENTS

- Embarked on a number of proactive planning initiatives
 - Launched Imagine Boston 2030 in Summer of 2015
 - Launched three strategic planning areas -- PLAN: South Boston Dorchester Avenue, PLAN: JP/ROX and PLAN: Dudley Square
 - Adopted South Huntington and Stuart Street zoning
 - Identified a future strategic planning area in Glover's Corner
- Actively participated in planning initiatives citywide (Go Boston, Boston Creates, Boston Public Schools Facility Master Plan, others)
- Focused on increasing transparency and availability of information
 - Updated zoning viewer to create an interactive GIS base map with access to assessing data and the zoning code, updated zoning to remove restrictive zoning such as allow bakeries, art galleries, radio/television repair, upholstery shops
 - Created an internal procedure focus group that has created draft procedures for a multitude of processes completed by BRA Planning Division
- Enhanced state/city collaboration by creating a new collaborative state/city working group to focus on "Open for Business"
 - Conducted State/City planning and development processes (MassDot Greenway Parcels and Back Bay Station Air Rights, North Station Transportation Action Plan)

PLANNING DIVISION: FY17 DEPARTMENT GOALS AND OBJECTIVES

Goals:

- Establish departmental procedures to ensure enhanced tracking/optimize staffing assignments
- Maximize near term opportunities to build new affordable housing and promote economic development while improving and enhancing existing neighborhoods
- Continue work on revisions to the Zoning Code that promote parity, eliminate redundancy, and increase predictability across all neighborhoods

Objectives:

- Finish recommendations and update zoning for PLAN Dot Ave, PLAN JP/Rox
- Develop plans, update zoning and draft RFPs for PLAN Dudley and 2 additional Strategic Planning Areas (SPAs)
- Work with Director of Real Estate on RFPs for BRA parcels to commence additional SPAs
- Align zoning to city planning goals and neighborhood preferences
- Harmonize Neighborhood and Sub-District Articles, eliminating distinctions without difference

PLANNING DIVISION

		FY17 Budget
PERSONNEL		
5005	Salaries and Wages - FTE	3,527,683
	Overtime (not calculation for fringe/benefits)	21,000
	Paid Interns	-
	Employment Service Contractors	32,500
	Salary increases - Merit/COLA	-
		Sub-Total \$ 3,581,183
EMPLOYEE BENEFITS		
5120-5125	Life/Health Insurance	642,941
5105-5115	Pension Contributions	1,108,120
5145	Actuarial Health Expense	-
5130	Workmen's Compensation	15,121
	Employment Service Contractors	5,850
	Salary increases - Merit/COLA fringe	-
		Sub-Total \$ 1,772,032
ADMINISTRATIVE EXPENSE		
6005	Advertising	25,000
6040	Data Processing	30,000
6010	Employee Education	12,712
6015	Graphic Design	-
6045	Leased Office Equipment	-
6020	Mapping & Model Supplies	2,000
6055	Marketing	-
6025	Office and Copy Supplies	5,000
6030	Postage	-
6050	Printing	-
6065	Subscriptions	14,000
6035	Telephone Services	-
6060	Travel/Administrative	15,500
6070	Bank Fees	-
		Sub-Total \$ 104,212
CONTRACTUAL SERVICES		
7005	Administration and Finance	-
7010	Legal	-
7015	Planning and Economic Development	3,026,000
		Sub-Total \$ 3,026,000
PROPERTY MANAGEMENT		
803X	Building & Land Maintenance	3,000
8180	Insurance	-
8185	Transportation	-
80XX	Bad Debt (A&F) / Utilities & Bonds (ECD)	-
		Sub-Total \$ 3,000
		GRAND TOTAL \$ 8,486,427

OFFICE OF WORKFORCE DEVELOPMENT OVERVIEW

- OWD's purpose is to be an innovative public agency that promotes economic resilience to ensure the full participation of all Boston residents in the city's economic vitality and future.
- OWD is the City's largest workforce development funder, and creates policies and programs that support the aspirations, education, and career paths for youth and adults.
- OWD oversees and convenes the region's one stop career center (American Jobs Centers) system.
- OWD oversees the Adult Literacy Initiative – a group of 26 state-funded pre-High Set and ESOL programs that serve greater Boston.
- OWD oversees the Neighborhood Jobs Trust, funded by Linkage fees from developers, and it also oversees the funding allocations of BRA mitigation funds

OFFICE OF WORKFORCE DEVELOPMENT: FY16 ACCOMPLISHMENTS

- Generated new grant revenue of \$1.46M from 8 new funding sources; net revenue increased 1\$.32M
- Launched Mayor Walsh's Tuition Free Community College Initiative for BPS graduates
- Launched the Boston's Greater Boston Apprenticeship Initiative (\$3M USDOL, \$12.3M from leveraged partners/Trades, and \$800K from city and partner funds) with 400 new apprenticeship slots with career advancing jobs in the construction and hotel & hospitality industries
- Compiled 5 research reports, including 3 randomized control studies on OWD's program and policy interventions, 1 Boston Labor Assessment with the BRA Research Division, and 1 report on Boston's best practices to support low-wage workers
- Distributed over \$5M to 69 organizations, with a goal of placing 900 Boston residents into jobs, enrolling 300 in post-secondary education/training, assisting 185 obtain high school diploma/HISET, and assisting 500 seniors and persons with disabilities experience an increase in income
- Distributed \$2.7M to 37 non-profits addressing youth employment and young adult education, placing youth into 477 jobs and providing 95 BPS high school diplomas
- Provided free tax preparation in 8 languages from 35 city-wide sites to 12,482 residents, yielding \$24,517 in total refunds and providing savings of \$2.5M to residents which would otherwise have been spent on tax preparers; Provided 3,496 Financial Check Ups (FCU) and credit building support at 8 of these tax sites

OFFICE OF WORKFORCE DEVELOPMENT: FY17 GOALS AND OBJECTIVES

Goals:

- Improvements of the OWD operating expenses to grant revenue ratio of 1:6.75; meaning, for every \$1 OWD receives from EDIC, we leverage \$6.75 (in FY15 the ratio was 1:5.82; in FY14 the ratio was 1:5.22)
- Pursue 4-6 new funding opportunities
- Grow the number of taxpayers served by the Boston Tax Help Coalition by 2-3%

Objectives:

- Develop 1-2 new education and workforce development initiative with evidence-based research for the city
- Enhance OWD's operations, management and HR capacity through continuous process improvements

OFFICE OF WORKFORCE DEVELOPMENT

		<i>FY17 Budget</i>
PERSONNEL		
5005 Salaries and Wages - FTE		3,693,818
Overtime (not calculation for fringe/benefits)		-
Paid Interns		-
Employment Service Contractors		518,089
Salary increases - Merit/COLA		-
Sub-Total		\$ 4,211,907
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		509,099
5105-5115 Pension Contributions		894,244
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		21,615
Employment Service Contractors		93,256
Salary increases - Merit/COLA fringe		-
Sub-Total		\$ 1,518,214
ADMINISTRATIVE EXPENSE		
6005 Advertising		6,000
6040 Data Processing		242,668
6010 Employee Education		8,000
6015 Graphic Design		15,000
6045 Leased Office Equipment		15,000
6020 Mapping & Model Supplies		-
6055 Marketing		11,500
6025 Office and Copy Supplies		223,192
6030 Postage		500
6050 Printing		37,500
6065 Subscriptions		30,000
6035 Telephone Services		60,000
6060 Travel/Administrative		25,000
6070 Bank Fees		-
Sub-Total		\$ 674,360
CONTRACTUAL SERVICES		
7005 Administration and Finance		70,000
7010 Legal		-
7015 Planning and Economic Development		12,014,626
Sub-Total		\$ 12,084,626
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		302,152
8180 Insurance		-
8185 Transportation		16,013
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		25,000
Sub-Total		\$ 343,165
GRAND TOTAL		\$ 18,832,272

QUESTIONS?

APPENDIX I: ADDITIONAL DEPARTMENT PRESENTATIONS

LEGAL DEPARTMENT: OVERVIEW

- Provide essential support to the core mission of the Agency – the department touches and reviews almost every document that the Board of Directors reviews as well as every document the Director signs
- Handle all legal aspects of the Agency and provide legal support and counsel on real estate, government and policy matters
- 10 Attorneys expertise focuses on transactional matters including the negotiations and drafting of all legal documents, such as:
 - Projects and properties undergoing review under Article 80 of the Boston Zoning Code and under Massachusetts General Laws Chapter 121A and Chapter 121B
 - Affordable Housing Agreements, Settlement Agreements, Land Disposition Agreements, Finance Agreements, Title, Leases, Licenses and Grant Agreements, Procurement and Public Records
- In more recent times, as the agency takes advantage of the real estate market and focuses attention disposing of properties and updating leases, outside counsel has been brought in to assist with legal documents in an effort to keep the agency in line with up to date commercial market provisions.

LEGAL DEPARTMENT: FY16 ACCOMPLISHMENTS

- Legal fees have gone down and we will continue to work on keeping them as low as possible.
- The backlog of leases has been and continues to be addressed, with only 5 old lease amendments remaining
- Many standard legal agreements templates have been created and are available to Agency staff
- With the new Director of Real Estate, the Legal department has drafted a test plan for addressing the backlog of property title
- The Legal Library has been organized and is being maintained
- The Procurement policy has been drafted. We are working with other department heads on set-up and implementation of the policy.

LEGAL DEPARTMENT: FY17 GOALS AND OBJECTIVES

Goals:

- Decrease outside legal fees
- Collaborate with Real Estate to address EDIC backlogged leases and licenses, and update leases and licenses
- Lead the creation and development of a Procurement policy for the agency
- Work with other staff, including training, on Urban Renewal matters, the Action Plan for the Urban Renewal Plans, and extension of the Urban Renewal Plans

Objectives:

- Work with other departments on streamlining request for legal review and drafting of documents and distributing executed documents (includes trainings, creating a standard process and collaborating on inter-department processes)
- Improve plan for addressing backlog of title for BRA owned property
- Lead Agency wide effort to standardize memos, agreements, and documents
- Organize and maintain the Legal Department common area and Library (clear files and paperwork, archive older files)

LEGAL

		FY17 Budget
PERSONNEL		
5005 Salaries and Wages - FTE		1,077,340
Overtime (not calculation for fringe/benefits)		
Paid Interns		
Employment Service Contractors		19,800
Salary increases - Merit/COLA		
		Sub-Total \$ 1,097,140
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		201,151
5105-5115 Pension Contributions		345,839
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		4,529
Employment Service Contractors		3,564
Salary increases - Merit/COLA fringe		
		Sub-Total \$ 555,083
ADMINISTRATIVE EXPENSE		
6005 Advertising		-
6040 Data Processing		-
6010 Employee Education		3,390
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		-
6025 Office and Copy Supplies		-
6030 Postage		-
6050 Printing		-
6065 Subscriptions		31,000
6035 Telephone Services		-
6060 Travel/Administrative		-
6070 Bank Fees		-
		Sub-Total \$ 34,390
CONTRACTUAL SERVICES		
7005 Administration and Finance		-
7010 Legal		600,000
7015 Planning and Economic Development		250,000
		Sub-Total \$ 850,000
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		-
8180 Insurance		-
8185 Transportation		-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		-
		Sub-Total \$ -
		GRAND TOTAL \$ 2,536,613

COMPLIANCE OVERVIEW

- The Compliance Department is divided into three distinct areas:
- **1. Housing Compliance** approves and monitors all BRA affordable housing condo sales and resales and rental units. This department manages the daily operations of the BRA/IDP/Affordable Housing compliance protocol to ensure that affordable housing adhere to the covenants established by the BRA at the time the units were put in place
- **2. Boston Jobs Policy Compliance** monitors The Mayor's executive order of July 12, 1985, entitled the Executive Order Extending the Boston Resident Jobs Policy, requiring the Developer to prepare and submit to the Authority an approved construction employment plan. This policy sets up the standards that at least 50 percent of total employee work hours should be filled by Boston Residents, at least 25 percent employees work hours should be filled by minorities, and at least 10 percent of the total employee work hours should be women. The BRA Boston Jobs Policy Compliance unit works with the Developers to review these "best effort" numbers by reviewing weekly time sheets and monthly analyzing each project for compliance. Individual construction meetings are held to monitor and instruct the Developers on the importance of the policy
- **3. Archives and Record Management** supports the planning records management guidelines of the BRA/EDIC files. This unit helps ensure that BRA/EDIC records are created, maintained, disseminated, and destroyed in a manner consistent with the transparency and accountability requirements of the Massachusetts Public Records Law

COMPLIANCE FY16 ACCOMPLISHMENTS

- Created a Google File to track all incoming rental and condo applications for affordable housing
- Coordinated FEMA reimbursement for the February 2015 Snowstorm with BRA, EDIC and City of Boston
- Recruited a new Records Manager. Brought support to the Housing Compliance Unit by hiring a Manager of Housing Policy and a new Housing Assistant
- Collaborated with the City of Boston Jobs Policy unit to coordinate reports for the Boston Jobs Ordinance by reviewing Boston resident, Minority and Women Construction jobs

COMPLIANCE FY17 GOALS AND OBJECTIVES

Goals:

- Improve reporting process regarding housing compliance
- Work collaboratively with Department of Neighborhood Development to standardize compliance practices for both
- Improve the transparent process to track developer benefit payments

Objectives:

- Increase awareness of Boston Jobs Policy in order to facilitate compliance; work closely with general contractors, union leadership, and City of Boston Residents Jobs Policy Unit to reinforce and creatively support this ordinance
- Create File Maintenance checklist for project managers to improve project transfers, records management and archives
- Collaborate with Executive Secretary to simplify BRA/EDIC archiving policies

COMPLIANCE

		FY17 Budget
PERSONNEL		
5005 Salaries and Wages - FTE		867,338
Overtime (not calculation for fringe/benefits)		-
Paid Interns		-
Employment Service Contractors		-
Salary increases - Merit/COLA		-
Sub-Total		\$ 867,338
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		145,322
5105-5115 Pension Contributions		252,721
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		3,954
Employment Service Contractors		-
Salary increases - Merit/COLA fringe		-
Sub-Total		\$ 401,996
ADMINISTRATIVE EXPENSE		
6005 Advertising		-
6040 Data Processing		-
6010 Employee Education		3,107
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		-
6025 Office and Copy Supplies		12,000
6030 Postage		-
6050 Printing		-
6065 Subscriptions		540
6035 Telephone Services		-
6060 Travel/Administrative		600
6070 Bank Fees		-
Sub-Total		\$ 16,247
CONTRACTUAL SERVICES		
7005 Administration and Finance		-
7010 Legal		-
7015 Planning and Economic Development		-
Sub-Total		\$ -
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		-
8180 Insurance		-
8185 Transportation		-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		-
Sub-Total		\$ -
GRAND TOTAL		\$ 1,285,581

DEVELOPMENT REVIEW OVERVIEW

- The Development Review Department is responsible for facilitating the evaluation of design, density, use, and physical and social impacts for all development projects in the City of Boston, including proposals for residential, commercial office, hotel, retail, and research & development uses.
- The Department includes 10 Project Managers who facilitate the review of small and large scale development proposals under the BRA's Article 80 Review process. This involves significant coordination with the BRA's Planning Division, as well as a wide range of City Agencies.
- The Department also engages in financial feasibility analysis for all projects requesting relief from the city's Inclusionary Development Policy under the direction of the Development Finance Manager in collaboration with the Housing Policy Manager.

DEVELOPMENT REVIEW DEPARTMENT: FY16 ACCOMPLISHMENTS

- In FY16 the Development Review Department successfully permitted 13.8million square feet of development.
- Total development cost of \$6.2 billion.
- This included 7.35 million SF of residential construction, totaling 6,787 units, including 1,115 affordable unit
- The department hosted over 200 meetings with community stakeholders
- New development permitted under the guidance of the Development Review Department in FY'16 created 11,673 constructions jobs and 8,533 permanent jobs.

DEVELOPMENT REVIEW DEPARTMENT: FY17 GOALS AND OBJECTIVES

Goals:

- Improve communication with Communities and Developers re: BRA Development Review Process (Civic engagement meeting on the Article 80 process)
- Refine internal and external processes

Objectives:

- Redefine department structure to allow for better internal and external operations
- Continue to develop stronger lines of communication with the BRA Planning Division with monthly cross departmental meetings to inform each other on current projects and master planning efforts
- Refine our internal processes to make for more informative and strategic thinking among departments, and Manage internal strategies more efficiently in order to provide better service to outside constituencies
- Cultivate a stronger departmental culture to keep staff engaged and happy, develop more professional advancement opportunities for staff and continue to foster more team building opportunities for staff)

DEVELOPMENT REVIEW

FY17 Budget	
PERSONNEL	
5005 Salaries and Wages - FTE	1,070,907
Overtime (not calculation for fringe/benefits)	-
Paid Interns	-
Employment Service Contractors	-
Salary increases - Merit/COLA	-
Sub-Total	\$ 1,070,907
EMPLOYEE BENEFITS	
5120-5125 Life/Health Insurance	182,554
5105-5115 Pension Contributions	316,867
5145 Actuarial Health Expense	-
5130 Workmen's Compensation	4,824
Employment Service Contractors	-
Salary increases - Merit/COLA fringe	-
Sub-Total	\$ 504,244
ADMINISTRATIVE EXPENSE	
6005 Advertising	-
6040 Data Processing	-
6010 Employee Education	4,237
6015 Graphic Design	-
6045 Leased Office Equipment	-
6020 Mapping & Model Supplies	-
6055 Marketing	2,128
6025 Office and Copy Supplies	-
6030 Postage	-
6050 Printing	-
6065 Subscriptions	5,103
6035 Telephone Services	-
6060 Travel/Administrative	2,554
6070 Bank Fees	-
Sub-Total	\$ 14,022
CONTRACTUAL SERVICES	
7005 Administration and Finance	-
7010 Legal	-
7015 Planning and Economic Development	-
Sub-Total	\$ -
PROPERTY MANAGEMENT	
803X Building & Land Maintenance	-
8180 Insurance	-
8185 Transportation	-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)	-
Sub-Total	\$ -
GRAND TOTAL	\$ 1,589,173

RESEARCH OVERVIEW

- The Research Department convenes and collaborates with other research organizations on topics of importance for the City by bringing together practitioners, researchers, and policymakers from organizations and communities around the city.
- **Mission** - To gain in-depth knowledge and provide strategic insight into a set of Boston-related social and economic issues needed to develop effective policies and strategies.

RESEARCH DEPARTMENT: FY16 ACCOMPLISHMENTS

- Published report: "BOSTON'S WORKFORCE An Assessment Of Labor Market Outcomes And Opportunities" for OWD. The report received significant coverage from the Boston Globe and NPR.
- Published 34 reports including a 15 part series on the foreign born in Boston.
- Answered 240 plus research requests from other departments in the BRA, other City departments, non-profit organizations, and Boston residents.
- City of Boston was awarded Platinum Status for city data for the second year in a row by the World Council for City Data (WCCD). The Research Department prepared the data and required extensive coordination with 27 federal, state, and local agencies.
- Developed citywide population and job projections for Imagine Boston 2030. Provided planning staff and HR&A with historical analysis for plan back to 1950.
- Provided "Boston by the Numbers" binders for other departments on key economic and demographic data.
- Designed and implemented databases which improved data tracking and analysis.

RESEARCH DEPARTMENT: 2017 GOALS AND OBJECTIVES

Goals:

- To gain in-depth knowledge and provide strategic insight into a set of Boston-related social and economic issues needed to develop effective policies and strategies
- Convene and collaborate with other research organizations on topics of importance for the City by bringing together practitioners, researchers, and policymakers from organizations and communities around the City

Objectives:

- Provide research products relevant to the BRA and City in the areas of economics and demographics.
- Continue to improve efficiency through automation and internally developed tools.
- Improve Research services by developing new methods, leveraging the diverse backgrounds of department staff and creating ways to increase and preserve institutional knowledge.

RESEARCH

		FY17 Budget
PERSONNEL		
5005	Salaries and Wages - FTE	611,231
	Overtime (not calculation for fringe/benefits)	-
	Paid Interns	-
	Employment Service Contractors	-
	Salary increases - Merit/COLA	-
Sub-Total		\$ 611,231
EMPLOYEE BENEFITS		
5120-5125	Life/Health Insurance	99,568
5105-5115	Pension Contributions	173,700
5145	Actuarial Health Expense	-
5130	Workmen's Compensation	2,839
	Employment Service Contractors	-
	Salary increases - Merit/COLA fringe	-
Sub-Total		\$ 276,107
ADMINISTRATIVE EXPENSE		
6005	Advertising	-
6040	Data Processing	40,000
6010	Employee Education	2,260
6015	Graphic Design	-
6045	Leased Office Equipment	-
6020	Mapping & Model Supplies	-
6055	Marketing	-
6025	Office and Copy Supplies	-
6030	Postage	-
6050	Printing	-
6065	Subscriptions	-
6035	Telephone Services	-
6060	Travel/Administrative	2,000
6070	Bank Fees	-
Sub-Total		\$ 44,260
CONTRACTUAL SERVICES		
7005	Administration and Finance	-
7010	Legal	-
7015	Planning and Economic Development	-
Sub-Total		\$ -
PROPERTY MANAGEMENT		
803X	Building & Land Maintenance	-
8180	Insurance	-
8185	Transportation	-
80XX	Bad Debt (A&F) / Utilities & Bonds (ECD)	-
Sub-Total		\$ -
GRAND TOTAL		\$ 931,598

DIRECTORS OFFICE

		FY17 Budget
PERSONNEL		
5005	Salaries and Wages - FTE	1,459,906
	Overtime (not calculation for fringe/benefits)	-
	Paid Interns	-
	Employment Service Contractors	-
	Salary increases - Merit/COLA	-
Sub-Total		\$ 1,459,906
EMPLOYEE BENEFITS		
5120-5125	Life/Health Insurance	285,151
5105-5115	Pension Contributions	488,090
5145	Actuarial Health Expense	-
5130	Workmen's Compensation	5,905
	Employment Service Contractors	-
	Salary increases - Merit/COLA fringe	-
Sub-Total		\$ 779,146
ADMINISTRATIVE EXPENSE		
6005	Advertising	-
6040	Data Processing	-
6010	Employee Education	5,085
6015	Graphic Design	-
6045	Leased Office Equipment	-
6020	Mapping & Model Supplies	-
6055	Marketing	-
6025	Office and Copy Supplies	6,000
6030	Postage	-
6050	Printing	-
6065	Subscriptions	16,300
6035	Telephone Services	-
6060	Travel/Administrative	10,000
6070	Bank Fees	-
Sub-Total		\$ 37,385
CONTRACTUAL SERVICES		
7005	Administration and Finance	-
7010	Legal	-
7015	Planning and Economic Development	536,000
Sub-Total		\$ 536,000
PROPERTY MANAGEMENT		
803X	Building & Land Maintenance	-
8180	Insurance	-
8185	Transportation	-
80XX	Bad Debt (A&F) / Utilities & Bonds (ECD)	-
Sub-Total		\$ -
GRAND TOTAL		\$ 2,812,437

SECRETARY'S OFFICE

		FY17 Budget
PERSONNEL		
5005 Salaries and Wages - FTE		267,942
Overtime (not calculation for fringe/benefits)		-
Paid Interns		-
Employment Service Contractors		-
Salary increases - Merit/COLA		-
	Sub-Total	\$ 267,942
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		52,199
5105-5115 Pension Contributions		89,755
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		1,091
Employment Service Contractors		-
Salary increases - Merit/COLA fringe		-
	Sub-Total	\$ 143,045
ADMINISTRATIVE EXPENSE		
6005 Advertising		500
6040 Data Processing		-
6010 Employee Education		847
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		-
6025 Office and Copy Supplies		-
6030 Postage		-
6050 Printing		-
6065 Subscriptions		2,000
6035 Telephone Services		-
6060 Travel/Administrative		2,000
6070 Bank Fees		-
	Sub-Total	\$ 5,347
CONTRACTUAL SERVICES		
7005 Administration and Finance		-
7010 Legal		-
7015 Planning and Economic Development		-
	Sub-Total	\$ -
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		-
8180 Insurance		-
8185 Transportation		-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		-
	Sub-Total	\$ -
	GRAND TOTAL	\$ 416,334

BOARD OF DIRECTORS

		<i>FY17 Budget</i>
PERSONNEL		
5005 Salaries and Wages - FTE		60,000
Overtime (not calculation for fringe/benefits)		-
Paid Interns		-
Employment Service Contractors		-
Salary increases - Merit/COLA		-
Sub-Total		\$ 60,000
EMPLOYEE BENEFITS		
5120-5125 Life/Health Insurance		12,363
5105-5115 Pension Contributions		21,056
5145 Actuarial Health Expense		-
5130 Workmen's Compensation		231
Employment Service Contractors		-
Salary increases - Merit/COLA fringe		-
Sub-Total		\$ 33,650
ADMINISTRATIVE EXPENSE		
6005 Advertising		-
6040 Data Processing		-
6010 Employee Education		-
6015 Graphic Design		-
6045 Leased Office Equipment		-
6020 Mapping & Model Supplies		-
6055 Marketing		-
6025 Office and Copy Supplies		-
6030 Postage		-
6050 Printing		-
6065 Subscriptions		-
6035 Telephone Services		-
6060 Travel/Administrative		-
6070 Bank Fees		-
Sub-Total		\$ -
CONTRACTUAL SERVICES		
7005 Administration and Finance		-
7010 Legal		56,000
7015 Planning and Economic Development		-
Sub-Total		\$ 56,000
PROPERTY MANAGEMENT		
803X Building & Land Maintenance		-
8180 Insurance		-
8185 Transportation		-
80XX Bad Debt (A&F) / Utilities & Bonds (ECD)		-
Sub-Total		\$ -
GRAND TOTAL		\$ 149,650

APPENDIX II: FY17 BUDGET DETAIL TABLES

FY17 COMBINED BUDGET REVENUE DETAIL (\$000'S)

COMBINED BRA/EDIC OPERATING BUDGET	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
RENTAL, LEASES, AND AGREEMENTS			
Rental Income	19,508	18,521	23,234
Parking	7,763	9,441	9,763
Pilot (EDIC)	1,124	1,156	1,164
Property Management Expense Reimb.	1,197	1,226	1,314
Sub-Total	\$ 29,592	\$ 30,345	\$ 35,476
EQUITY PARTICIPATION			
Percentage Rent	3,125	3,804	3,400
Sub-Total	\$ 3,125	\$ 3,804	\$ 3,400
PROJECT INCOME			
	-	334	-
Sub-Total	\$ -	\$ 334	\$ -
GRANT & OTHER INCOME			
OWD Grants	15,848	16,894	16,041
Other Grant Income	1,821	3,542	2,543
Inter-company	2,500	3,000	3,893
Interest & Other Income	182	730	887
Sub-Total	\$ 20,351	\$ 24,166	\$ 23,364
GRAND TOTAL	\$ 53,068	\$ 58,648	\$ 62,239

FY17 COMBINED BUDGET EXPENSE DETAIL (\$000'S)

	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
PERSONNEL	16,937	18,524	19,542
Sub-Total	\$ 16,937	\$ 18,524	\$ 19,542
EMPLOYEE BENEFITS			
Retirement	3,668	4,406	5,180
Health Insurance	2,845	3,346	2,972
OPEB	1,502	1,171	1,666
Other Benefits	86	92	359
Sub-Total	\$ 8,101	\$ 9,016	\$ 10,176
ADMINISTRATIVE	969	1,171	1,958
Sub-Total	\$ 969	\$ 1,171	\$ 1,958
CONTRACTUAL SERVICES			
Administration & Finance	274	299	297
Office of Workforce Dev. (CBO's)	12,710	12,400	12,014
Legal	1,070	382	730
Planning & Economic Dev.	1,531	1,631	4,462
Sub-Total	\$ 15,584	\$ 14,712	\$ 17,503
PROPERTY MANAGEMENT/DEBT SERVICE			
Depreciation	2,208	2,405	2,500
Land & Building Maintenance	6,151	5,607	6,324
Debt/Utilities/Bonds	1,192	931	1,439
Other	2,263	6,090	2,207
Sub-Total	\$ 11,815	\$ 15,033	\$ 12,471
Grand Total	\$ 53,407	\$ 58,455	\$ 61,651

FY17 BRA BUDGET REVENUE DETAIL (\$000'S)

	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
RENTAL, LEASES, AND AGREEMENTS			
Rental Income	8,288	7,468	8,018
Parking	2,633	3,804	3,835
Pilot (EDIC)	-	-	-
Property Mgmt. Expense Reimb.	-	-	290
Sub-Total	\$ 10,921	\$ 11,272	\$ 12,143
EQUITY PARTICIPATION			
Percentage Rent	1,925	2,411	2,200
Sub-Total	\$ 1,925	\$ 2,411	\$ 2,200
PROJECT INCOME			
	-	334	-
Sub-Total	\$ -	\$ 334	\$ -
GRANT & OTHER INCOME			
Grant Income	1,821	3,251	2,543
InterCompany	2,500	3,000	3,893
Other	164	416	352
Sub-Total	\$ 4,485	\$ 6,667	\$ 6,788
Grand Total	\$ 17,331	\$ 20,684	\$ 21,130

FY17 BRA BUDGET EXPENSE DETAIL (\$000'S)

	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
PERSONNEL	7,292	7,892	7,763
Sub-Total	\$ 7,292	\$ 7,892	\$ 7,763
BENEFITS			
SOCIAL SECURITY / RETIREMENT	2,006	2,102	2,658
HEALTH INSURANCE	1,534	1,860	1,561
OTHER BENEFITS	23	27	96
OPEB	1,502	1,171	1,666
Sub-Total	\$ 5,065	\$ 5,161	\$ 5,980
ADMINISTRATIVE	\$ 534	\$ 506	\$ 556
Sub-Total	\$ 534	\$ 506	\$ 556
CONTRACTUAL SERVICES			
ADMINISTRATION & FINANCE	88	94	90
CBO'S (OWD)	-	-	-
LEGAL	903	255	544
PLANNING/ EC. DEVELOPMENT	719	1,482	3,236
Sub-Total	\$ 1,710	\$ 1,830	\$ 3,870
PROPERTY MANAGEMENT/DEBT SERVICE			
DEPRECIATION	551	586	700
LAND & BUILDING MAINTENANCE	1518	1851	1789
DEBT SERVICES	-	-	-
OTHER	215	321	357
Sub-Total	\$ 2,285	\$ 2,759	\$ 2,846
Grand Total	\$ 16,886	\$ 18,147	\$ 21,014

FY17 EDIC BUDGET REVENUE DETAIL (\$000'S)

	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
RENTAL, LEASES, AND AGREEMENTS			
Rental Income	11,220	11,053	14,926
Parking	5,131	5,637	5,928
Pilot (EDIC)	1,124	1,156	1,164
Property Mgmt. Expense Reimb.	1,197	1,226	1,314
Sub-Total	\$ 18,671	\$ 19,073	\$ 23,333
EQUITY PARTICIPATION			
Percentage Rent	1201	1,392	1,200
Sub-Total	\$ 1,201	\$ 1,392	\$ 1,200
PROJECT INCOME			
	-	-	-
Sub-Total	\$ -	\$ -	\$ -
GRANT & OTHER INCOME			
OWD Grants	15,848	16,894	16,041
Grant Income	0	292	517
InterCompany	15	297	0
Other	3	16	18
Sub-Total	\$ 15,866	\$ 17,499	\$ 16,576
GRAND TOTAL	\$ 35,738	\$ 37,964	\$ 41,109

FY17 EDIC BUDGET EXPENSE DETAIL (\$000'S)

	FY 15 ACTUAL	FY16 ESTIMATE	FY17 BUDGET
PERSONNEL	9,645	10,632	11,780
Sub-Total	\$ 9,645	\$ 10,632	11,780
BENEFITS			
SOCIAL SECURITY / RETIREMENT	1,662	2,304	2,515
HEALTH INSURANCE	1,311	1,486	1,415
OTHER BENEFITS	62	65	266
OPEB	-	-	-
Sub-Total	\$ 3,036	\$ 3,855	4,196
ADMINISTRATIVE	435	665	1,402
Sub-Total	\$ 435	\$ 665	1,402
CONTRACTUAL SERVICES			
ADMINISTRATION & FINANCE	186	205	207
CBO'S (OWD)	12,710	12,400	12,015
LEGAL	167	127	186
PLANNING/ EC. DEVELOPMENT	812	150	1,226
Sub-Total	\$ 13,874	\$ 12,882	13,634
PROPERTY MANAGEMENT/DEBT SERVICE			
DEPRECIATION	1,657	1,819	1,800
LAND & BUILDING MAINTENANCE	4,633	3,756	4,535
DEBT/UTILITIES/BONDS	1,192	931	1,439
OTHER	2,048	5,769	1,850
Sub-Total	\$ 9,531	\$ 12,274	9,625
Grand Total	\$ 36,521	\$ 40,308	40,637