FAIRMOUNT RETAIL DISTRICT RESEARCH AND BUSINESS RECRUITMENT PROJECT

Work Product One:

Foundation Research for Station Area Commercial Revitalization Planning:

Information Generated from Previous Studies & Status of Business District Revitalizations Strategies

December 2011

Prepared for:

Fairmount Indigo CDC Collaborative

Prepared by:



Peg Barringer, Peg@FinePointAssociates.com 617) 763-5952, www.finepointassociates.com

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Purpose, Process & Summary of Findings

Foundation Research for Station Area Commercial Revitalization Planning

Purpose

To lay the groundwork for future planning efforts in the Fairmount Transit corridor by assembling and summarizing the information that has been generated thru previous studies and assessing the progress of business district revitalization strategies currently being implemented near the stations.

Research Process

- Four Station Areas were explored: Uphams, Four Corners, Blue Hill Ave./ Cummins Highway and Fairmount.
- FinePoint Associates conducted a visual assessment of each station area and illustrated the character of the area and relationship to nearest business district with photographs and maps.
- We reviewed market analysis information and other data about the business districts from previously conducted studies and developed a summary of key information.
- We reviewed documents and interviewed key players in the organizations that are implementing revitalization strategies in the business districts in order to assess the status of activities.

Note: The Information about strategies being implemented and the results that have occurred was not readily available from any single source. This information had to be gathered from multiple documents and interviews. We did our best best to provide a summary highlighting most of the recent revitalization activities and accurate information about outcomes, however, this report may not be inclusive of all strategies or results.

A report for each station area was produced covering three topics:

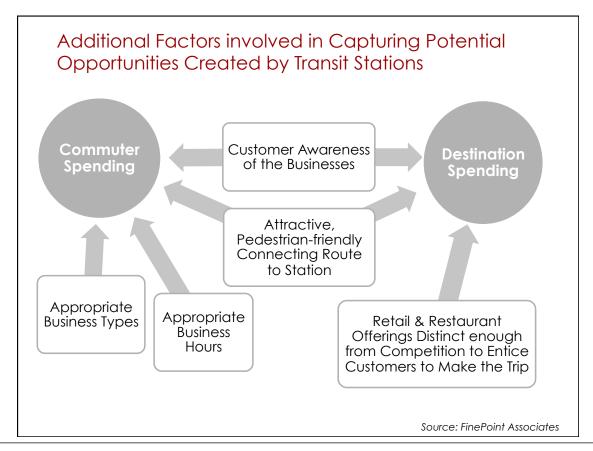
- 1. Station Area Assessment
 - Surrounding uses and character of the area
 - Relationship to business district
- 2. Business District Market Study & Business Information
 - Trade area demographics
 - Income & spending; potential opportunities
 - Other market segments & district features/assets
 - Business & real estate data
- 3. Business District Revitalization Strategies
 - Strategies, status & results

Key Elements for Commercial District Success

- 1. Retail Mix
- 2. District Experience (Outside the Store)
- Access
- Events
- Aesthetics
- Safety
- Amenities
- Image
- "Stage" the Shopper

- 3. Inside the Store
- Customer service
- Selection
- Quality
- Price
- Display/Layout/cleanliness
- Atmosphere/comfort
- "Sell" the Shopper

Source: Adapted by FinePoint Associates from International Council of Shopping Centers



Summary of Findings: Station Areas

- The synergy between the transit stations and the nearest business district varies by station. In general the station areas lack visual clues that you have arrived in or near a commercial district.
- Some station areas feel removed from the business districts because of intervening uses, nearby vacant sites or distance. Cummins Highway Station is slightly more than 1/4 mile walk from the Mattapan Square District.
- The connecting routes between the stations and the business districts are not particularly inviting or pedestrian friendly.
- Marketing the business districts to potential customers and letting them know what goods & services are available is an on-going challenge. Additional advertising will be necessary to capture market potential associated with commuters and/or new residential development in station areas.
- Suggestions to consider:
 - Market the business districts at stations (e.g., business directory kiosks).
 - Address issues of abandonment/inactivity in connecting routes
 - Make connecting routes more pedestrian-friendly

Summary of Findings: Market Studies & Business Data

- Fairly recent market study (within 5 years) & business inventory information (within 3 years) is available for several of the business districts including: Hyde Park, Four Corners, Bowdoin Geneva and Uphams Corner. This report contains a summary of the key information for each district.
- There is much less current information for Mattapan Square. There was only a consumer survey and limited demographics (from 2000) included in the existing studies. There is a tally of businesses but it is not a full business inventory.
- After the Mattapan Square Main Street Organization is staffed up and fully functional, perhaps this organization could work toward the completion of a business inventory, property inventory and market analysis. The business inventory should include information such as: street address, amount of square feet occupied/leased, business name, business type, business characteristics and contact information for business and property owners.

Summary of Findings: Main Street Organizations

■ There are Main Street Organizations (MSOs) working in four station areas.

Hyde Park Main Street (HPMS) and **Uphams Corner Main Street** (UCMS) are very actively engaged in revitalization activities.

Four Corners Main Street (4CMS) has been very active in the past, especially with planning initiatives; the organization is currently going thru a transition after the departure of a long-time executive director and change in Board members. A new director has been hired and the Board appears to be re-grouping. The Four Corners Station has an exit onto Geneva Avenue (in addition to the entrance on Washington Street). This will have some impact on businesses within the **Bowdoin Geneva Main Street** (BGMS) District. The information that was available about strategies undertaken by BGMS has been included in the report.

Mattapan Square Main Street (MSMS) is a brand new organization. MSMS had their first visioning session in September and they are working to develop a business plan and hire a director.

There are many revitalization activities and planning efforts underway in the business districts. The report provides a listing of recent activities and results for each district.

Summary of Findings: Revitalization Strategies

- HPMS, UCMS, 4CMS and BGMS have all used market data to develop goals and guide business development efforts. Many new businesses have opened in the districts and several reflect the types of businesses that were identified in the market studies to complement existing clusters. Examples in Hyde Park include: Justine's Dancewear (arts related) and Annabelle's (sit-down restaurant). Examples in Uphams include: Paraiso (moderate-price restaurant), Brother's Market (ethnic grocery) and Rainbow (urban clothing/ethnic).
- Achieving a desired business mix remains a significant challenge. Most of the MSOs cite a negative image for the commercial district as the major impediment to business recruitment. The MSOs, for the most part, are approaching business recruitment by trying to improve the image of the district thru public relations campaigns, making the district more attractive and retail-ready with infrastructure and storefront improvements, and addressing issues of cleanliness and safety. In addition to image of the area, market potential, high foot traffic and proximity to related uses impact business location decisions.

Summary of Findings: Revitalization Strategies (cont'd)

- The MSOs are not doing much direct recruitment of specific businesses for specific spaces. UCMS spent a year trying to recruit a café next to the Strand Theater and has now decided that their efforts would be better spent marketing the District as a whole to all potential businesses.
- All of the established MSOs work with property and business owners to market the ReStore Program and encourage storefront and other physical improvements. There have been several storefront improvements in Uphams Corner, Hyde Park and Four Corners. In addition, several larger redevelopment efforts are currently underway in Hyde Park (e.g., Dana Block renovation, Everett Theater renovation)
- Conditions both inside and outside of the stores remain a challenge. Getting business owners into compliance with sign regulations and health & safety codes is an issue. In some cases, window display and conditions inside the stores are not attracting and indeed, might be deterring customers.
- UCMS, 4CMS, BGMS and the BRA have actively participated in planning initiatives to guide development in the overall Districts and/or specific parcels owned by the City and the Catholic Diocese.

Summary of Findings: Revitalization Strategies (cont'd)

- In Mattapan and Hyde Park, recent community planning initiatives, led by the BRA, have been completed, resulting in new land use and zoning regulations for the business districts.
- Most of the MSOs develop and manage events that bring customers into the business district. HPMS manages a full calendar of events including a weekly farmers market, annual arts & craft festival, summer concert series, film series, pub crawls and holiday decorations.
- Managing organizational capacity, time and resources to accomplish doable projects that will have the biggest impact is an on-going challenge for the MSOs. Each of the MSOs only have 1 staff person, with the exception of HPMS, which has an additional part time staff person. Although, the Main Street model relies heavily on volunteers, many tasks still fall to the staff and the MSOs have many on-going general organizational/administrative responsibilities (e.g., fundraising, website maintenance, financial management) in addition to their programmatic efforts.



Uphams Station

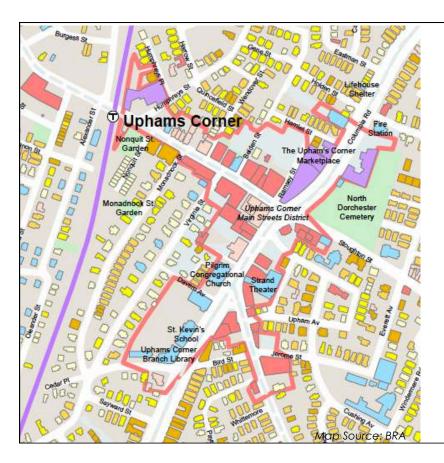
Foundation Research for Station Area Commercial Revitalization Planning

Uphams Corner

Station Area Assessment

Projected Ridership by Year 2025: 450 Weekday Boardings*

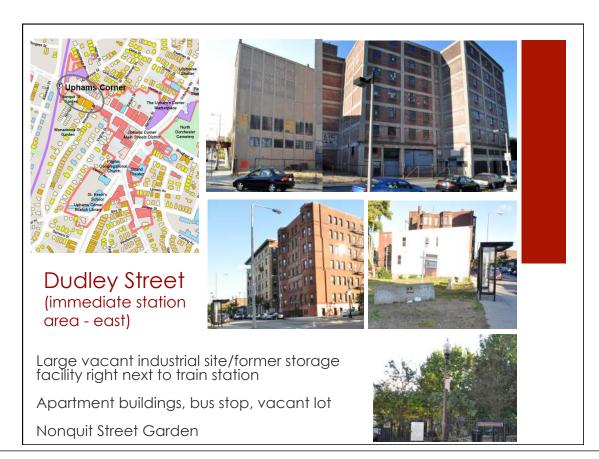
*Assuming increased peak and off peak service frequency Source: "Fairmount Line Feasibility Study", MBTA, KKO and Associates, 2002

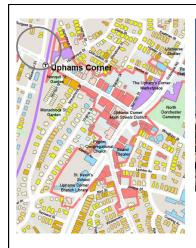


Character of Surrounding Area

Station is located at the northwestern boundary of the Uphams Corner Main Street District

Immediate area: vacant industrial site, neighborhood commercial businesses along Dudley Street and large new community center









Ray and Joan Croc Community Center

Apartment buildings













Dudley Street

Dense corridor of retail, chain stores and many independents

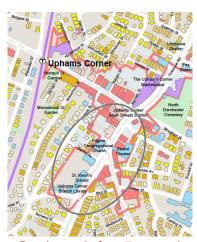
Clothing stores, shoe stores

Discount stores, home furnishings

CVS, Brothers (small supermarket)

New restaurant











Columbia Road

Retail, institutional & cultural Uses

Banks, churches

Strand Theater

St. Kevin's Redevelopment Site (80 units of low income tax credit housing and library proposed)





Relationship of Station to Business District

- Station is right at NW boundary of Uphams Corner District
- Very short walk (1 minute, <.1 mile) to commercial activity on Dudley St. and .2 mile to Columbia Rd. intersection
- Currently, station feels a little cut off from business district due to vacant sites nearby
- No visual cues signaling arrival into a business district or indication of what might be available

Uphams Corner Business District

Market Analysis & Business Information

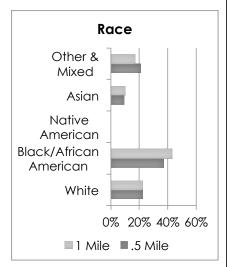
- Market Assessment Completion Date: 2006
- Business District Inventory/Mix Analysis Completion Date: 2008
- By/with/for: FinePoint Associates, Economic Restructuring Committee Uphams Corner Main Street, Boston Main Street

Trade Area Demographics (2005)

Market Characteristics	.5 Mile Radius	1 Mile Radius
Population	17,548	54,230
Number of Households	5,672	18,666
Median Age	30.3	30.2
Avg. persons per Household	3	2.85
Owner-Occupied	31%	29%
Households with Children	35%	39%
Households with no vehicle	35%	39%

^{*** 1-}mile radius includes population in .5-mile radius

Resident Market Description/Segments: large segment of families representing a rich blend of cultures (Cape Verdean, African American, White, Hispanic, Asian), many working in government, health care and other service industries; young well educated professionals beginning their careers; new homeowners redeveloping historic homes, some gay couples and singles.



Hispanic of	Any Race
. 5 Mile	1 Mile
21%	19%

Income & Spending (2005)

Resident Income	.5 Mile Radius	1 Mile Radius
Median Household Income	\$40,600	\$37,765
Average Household income	\$54,601	\$51,156
Per Capita Income	\$18,085	\$17,726

Annual Resident Expenditures (millions)	.5 Mile Radius	1 Mile Radius
Eating & Drinking Places	\$21	\$65
Furnishings, Electronics/ Appliance, Bldg. Supply	\$10	\$32
Food & Beverage Stores	\$23	\$70
Health & Personal Care Stores	\$7	\$22
Clothing & Accessories	\$8	\$25
General Merchandise	\$8	\$26
Other Retail	\$7	\$21
Total	\$84	\$230

Potential Opportunities

A comparison of resident expenditures to business sales in the trade area indicated only a small amount of sales leakage/retail gap (presumably due to proximity of South Bay Shopping Center)

Businesses that might complement existing clusters/ capitalize on customer traffic:

- Food/grocery
- Clothing (urban oriented)
- Coffee shop/sandwich
- Restaurant (moderate price)
- Children's goods

Possible Niches:

- Arts, Eating & Entertainment
- Ethnic Specialties
- Clothing & Accessories

Other Market Segments

Strand Theater Patrons

Potential regional draw

Area Employees/ Businesses

370 businesses, 3,000 employees (w/i .5 mi)

Commuters

 Located along a primary commuter route into Boston and is a major public transportation hub; 27,000 vehicles drive through daily

Other District Features/Assets

- Residents prefer to shop locally --- almost 40% do not own cars
- Households with incomes over \$75,000 are increasing faster in this neighborhood than in the City overall.
- Plenty of free on and off-street parking.
- Well served by public transportation including Red Line, bus and Fairmount Line.
- Home to many strong community institutions several major banks, health care centers, library, and new (\$100 million) community center
- Great location for urban entertainment and restaurants -- Home of the Historic Strand Theater (planned renovation)

Business & Real Estate Data

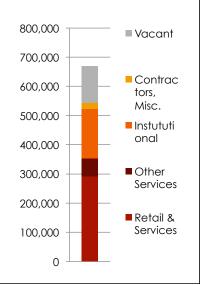
■ Information Date: 2008

■ Vacancy: 23%

■ Number of Businesses: 131

Commercial/Institutional Space: 675,000 s.f. (approx.)

	#	S.F.
Retail	44	112,000
Restaurants	17	28,000
Personal Services	23	48,000
Professional Services	16	101,000
Other Services	4	63,000
Institutional	21	170,000
Contractors, Mfg. Misc	6	20,000
Vacant Commercial Units	18	126,000



Uphams Corner Business District

Revitalization Strategies

Primary Revitalization Organization:

- Uphams Corner Main Street (UCMS)
- Staff: 1 full time

Community Development Corporation Service Area:

Dorchester Bay Economic Development Corporation (DBEDC)

Strategies	Status	Results
Business Recruitment		
Market the district to prospective businesses • Develop & distribute business recruitment brochure • Develop business prospect list & contact businesses	2008 – 2010 completed brochure & many business contacts, on- going marketing	Many new businesses have opened. Several of the new businesses reflect the types of businesses identified in the market study to complement existing clusters. Examples include: Paraiso (moderate restaurant), Brother's Market (ethnic grocery, Rainbow (urban clothing/ethnic)
Work with property owners to attract desirable business tenants • Contact property owners & help with tenant recruitment • Maintain vacant space inventory	Some on-going efforts But decision to change strategy, de-emphasize recruitment efforts for specific vacancies	Spent long time trying to recruit café tenant for space near Strand Theater, ultimately with no success. UCMS thinks efforts might be better spent marketing the whole District to all potential businesses and improving the desirability of the area as a business location

Strategies	Status	Results
Business Assistance		
Business Breakfasts – speakers & networking	On-going	9 meetings with average attendance of 60
Provide assistance with licensing/ regulatory issues, storefront consultation, marketing, making connection with neighborhood residents, inventory feedback, referrals for loans & TA	On-going	Assisted many businesses (e.g., >30 in last half of 2010); Helped Kroc Ctr connect to neighborhood thru events & info distribution
Strand Theater Assistance/Support/ Promotion		
Strengthen & Support Strand Theater as way to make District a more desirable business location & attract potential customers to the area	On-going	This is a new strategy
Encourage/facilitate additional programming for the theater, especially youth targeted, work with local community groups		
Promote Strand Theater events, hold events in Main Street office		

Strategies	Status	Results
Market & Business Data Collection/ Analysis		
Business Inventory, business mix analysis	2008	Completed inventory, good base of information, large volunteer effort, good public relations, good info to guide business dev. efforts
Market assessment	2006	Useful data to include in business recruitment materials & guide recruitment efforts
Encourage & Guide Real Estate Development		
St. Kevin's Area Planning Collaborative Visioning (for St. Kevin's school buildings)	Done, follow- up on- going	This will help to ensure development is informed & guided by best interest of community. The amount of affordable housing has proven to be a divisive issue. So far, no consensus of support or in opposition to the project has been reached.
Established criteria for evaluating the impact of new businesses & development on the district	Done, continue to use	Facilitates constructive discussion when developers/business owners approach UCMS for support

Strategies	Status	Results
Physical Improvement		
Facilitate Storefront Upgrades Encourage attractive signs and storefront design • advocate for interior-only grates, no interior lit box signs, no waterfall awnings, preserving historic elements	On-going	Many storefronts have been improved. Recent examples include: "Only One Design",19 Ramsey St., 16 Hancock St. (5 stores in all) and 500 Columbia Road (municipal bldg.) Getting business owners into compliance with signage rules is a big challenge (most of the signage rules are associated with DND ReStore program, some rules that apply to monument signs are regulations that need to be followed through ISD)
Work toward securing resources for sidewalk & streetscape improvements Complete "Public Infrastructure Deficit Report" to encourage City to make improvements	2007	Some infrastructure improvements completed including: repavement of Columbia Road and crosswalks repainted
UCMS has decided to focus its current infrastructure efforts on projects it can control	On-going	Potential projects identified: fixing fence at Citizens Bank parking lot, creating green space.

Strategies	Status	Results
Promotion/Public Relations/Image		
Holiday Promotions to create more foot traffic	2009 On- going	Created "Passport to Uphams Corner", a holiday retail event/ contest; 30 people participated in 2009. Program is not on-going.
Link Strand Theatre Patrons to Other District Businesses	On- going	2009- Helped businesses create event-related specials and discounts to coincide with "Aint Misbehaivn" performances
Improve identity& brand of Upham's Corner Business District • Signage identifying district • Signage identifying parking	On- going	This is a new strategy
Safety & Cleanliness		
Make Uphams safer, cleaner attractive and connected community	On- going	Safety resource Book for business owners is being developed. UCMS plans to measure utilization/ effectiveness with follow-up surveys. Conduct annual Boston Shines Clean-
		up and is expanding program to more frequent cleanups

Strategies	Status	Results
Organization	310103	Results
Engage community in the work of UCMS	On- going	Launched "Turn the Corner", a social event, last Thursday of month; small gatherings (sometimes over 15 people), hoping to sustain and increase attendance Moved Office to storefront location
Develop deeper commitment from Board members; Ensure a balanced, diversified representative Board	On- going	Identified new Board members
Match programs, projects, services with community needs and org. capacity; Staff UCMS to meet needs of current & future admin, programs, services	On- going	New Director hired
Continue to manage finances of the organization; Meet organizations fundraising obligations	On- going	Stabilized finances & improved systems; Developed major annual fundraiser "Urban Safari", paid off debt
Nurture and sustain volunteers to support UCMS	On- going	

Activities that have been Particularly Impactful

- Business Seminars/Networking Sessions
- St. Kevin's Community Visioning/Planning

Challenges

- Creating strong identity/positive image for the District as destination not just a pass thru
- Cleanliness and aesthetic appeal
- Recruiting café/other businesses to complement Strand (negative perception is significant obstacle to business recruitment)
- Engaging merchants can be challenging, busy with their business, sometimes cynical about what MS can do
- Managing capacity, time & resources to accomplish doable projects with biggest impact
- Promoting the District's assets

Previously Completed Plans: Uphams Corner

Strategic Plan for Upham's Corner Main Street 2011

By/with/for: UCMS Board and staff

St. Kevin's Area Planning Collaborative (SKAPC) Community Visioning Process 2009 – 2010

By/with/for: UCMS Board and staff, DSNI, Uphams Corner Westside Neighborhood Association, SAS/Design, Inc., Jacobs

Earlier Studies that were completed inloude: "Final Report of Mayor's Task Force on Future of the Strand Theater", 2004 and "Uphams Corner as a Local and Regional Destination 2001, MIT students



Four Corners/ Geneva Station

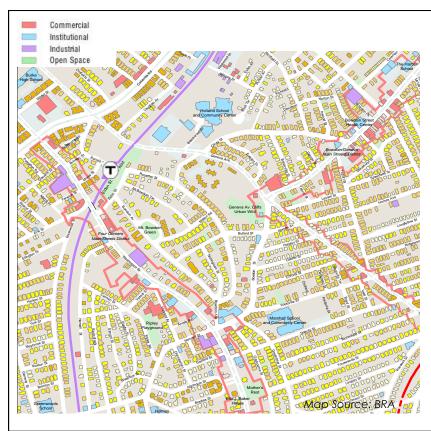
Foundation Research for Station Area Commercial Revitalization Planning

Four Corners/ Geneva

Station Area Assessment

Projected Ridership by Year 2025: 1,850 Weekday Boardings*

*Assuming increased peak and off peak service frequency Source: "Fairmount Line Feasibility Study", MBTA, KKO and Associates, 2002

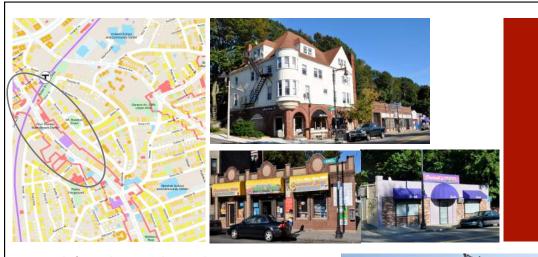


Character of Surrounding Area

Station will be located between Washington Street and Geneva Avenue with access from each

Washington Street entrance – several small retailers & restaurants

Geneva entrance
– Holland School
& Community
Center; the rest is
residential in
immediate area



Washington Street (immediate station area)

Four Corners Business District -- convenience markets, hair/nail salons, barber, auto body, laundry, pest control, storefront churches















Washington Street (immediate station area, cont'd)

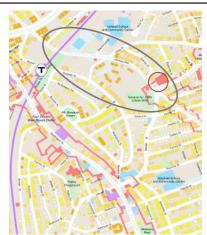
Casual restaurants (Jamaican, fish & chips, pizza)

Several vacant storefronts

Multifamily residential; some single

New residential/mixed use dev. project underway – 24 housing units and 3,500sf of retail (tenant to be identified)







Geneva Ave (immediate station area)

Mostly residential (many triple deckers) and Institutional uses e.g., Holland School Community Center, ABCD Roxbury Head Start

Geneva Cliffs – green space

Walgreens and 3 - 4 other small businesses at Geneva Ave and Bowdoin Street (shown by red circle on map)







Relationship of Station to Business Districts

- Strong connection to Four Corners Main Street District--New station will be adjacent/very short walk to Four Corners Business District
- Not as strong connection to
 Bowdoin Geneva
 Main Street District -- Station is approx. 1/3 mile walk to closest commercial node

*Note: BGMS indicated that they consider Holland Community Ctr & ABCD to be part of their district, even though this differs from the boundaries shown on the BRA map

Four Corners/Geneva Station

Below Grade at Washington St.



Platform configuration reduces visibility of Four Corners businesses to potential customers.

Circulation pattern might not promote homebound commuter shopping (i.e., Inbound -- closer walk to platform from Washington St.; Outbound -- closer walk to exit at Geneva Ave.)

Above Grade at Geneva Ave



Geneva entrance feels very residential, not like a commercial node. Immediate area is residential and institutional (e.g., school)



From Station to Bowdoin Geneva District

Connection is less strong with BGMS District than 4CMS District

Approx. 1/3 mile walk from the station to a small commercial node at the intersection of Bowdoin Street and Geneva Ave (Walgreens and 3 - 4 other businesses). This node is separated from the rest of BGMS District by intervening residential uses (the rest of the businesses in BGMS district are located ½ mile or more from the station.

Between station & Walgreens commercial node, uses are residential and institutional

Four Corners Business District

Market Analysis & Business Information

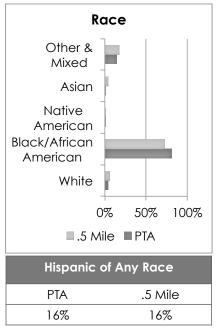
- Market Assessment Completion Date: 2009
- Business District Inventory/Mix Analysis Completion Date: 2009
- By/with/for: FinePoint Associates, Economic Restructuring Committee Four Corners Main Street, Boston Main Street, Boston Redevelopment Authority

Trade Area Demographics (2008)

Market Characteristics	Primary Trade Area (PTA)	.5 Mile Radius
Population	10,013	17,729
Number of Households	3,214	5,401
Median Age	28.7	29.0
Avg. persons per Household	3.1	3.27
Owner-Occupied	33%	36%
Households with Children	51%	53%
Households with no vehicle	36%	34%

PTA = area where most of the repeat customers live PTA Boundaries were estimated based upon information from community representatives regarding local shopping patterns, competing commercial facilities and socio-economic barriers.

Resident Market Description: moderate income families with children, ethnically diverse, African American, Caribbean, Cape Verdean & Latino.



^{*.5} mile from intersection of Washington & Bowdoin, <u>not station</u>

Income & Spending (2008)

Resident Income	PTA	.5 Mile Radius
Median Household Income	\$43,569	\$46,229
Average Household income	\$55,559	\$59,952
Per Capita Income	\$17,976	\$18,405

Annual Resident Expenditures (millions)	PTA	.5 Mile Radius
Eating & Drinking Places	\$11	\$20
Furnishings, Electronics/ Appliance, Bldg, Supply	\$7	\$12
Food & Beverage Stores	\$14	\$26
Health & Personal Care Stores	\$3	\$6
Clothing & Accessories	\$6	\$10
General Merchandise	\$6	\$11
Other Retail	\$1	\$2
Total	\$48	\$87

Potential Opportunities

Analyses indicate that residents living in the PTA make approx. \$22 million of retail & restaurant expenditures outside the PTA.

The category with most significant sales leakage* is: restaurants (especially full service)

^{*} Sales leakage (or "retail gap") is the difference between the amount that residents are spending each year on retail & restaurants goods and the amount that local businesses capture in sales. In other words, the estimated amount that residents spend outside of the Trade Area

^{*} In this analysis, "significant sales leakage" refers to sales leakage that is sufficient to support a new outlet of typical size under a 60% capture scenario.

Other Market Segments

Area Employees/ Businesses

268 businesses, 1,600 employees (in PTA)

Commuters

 New train station will have an entrance from Washington Street

Other District Features/Assets

- Residents prefer to shop locally --- more one-third do not own cars
- 13,000 vehicles per day on Washington Street bring potential customers for the district
- 11,700 people ride the number 23 bus every day along Washington Street
- The new train station at Washington and Erie Streets will attract many daily riders (1,850 projected weekday boardings by 2025)
- There are 20 city-owned properties along Washington Street available for development, with opportunities for assembly

Business & Real Estate Data

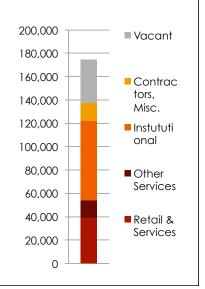
■ Information Date: 2009

■ Vacancy: 21%

Number of Businesses: 68

Commercial/Institutional Space: 170,000 s.f. (approx.)

	#	S.F.
Retail	11	13,000
Restaurants	7	6,000
Personal Services	12	12,000
Professional Services	4	3,000
Other Services	6	15,000
Institutional	17	68,000
Contractors, Mfg. Misc	5	15,000
Vacant Commercial Units	9	37,000



Four Corners Business District

Revitalization Strategies

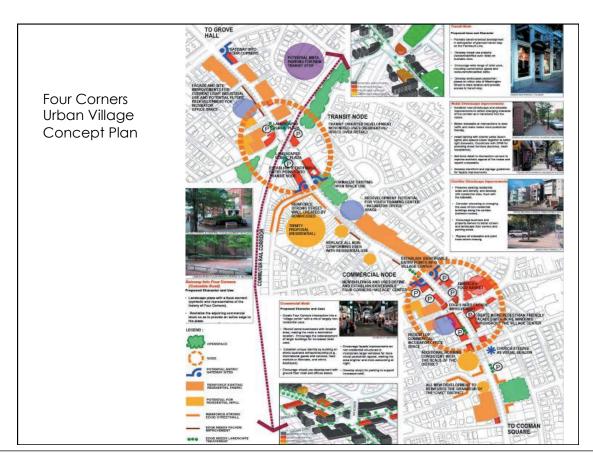
Primary Revitalization Organization:

- Four Corners Main Street (4CMS)
- Staff: 1 full time

Community Development Corporation Service Area:

Codman Square Neighborhood Development Corporation (CSNDC)

Strategies	Status	Results		
Encourage & Guide Real Estate Development				
Urban Village Concept Plan – community planning process, spear headed by 4CMS with S&L urban design firm	Done in 2003, still working to implement the concept	A blueprint to direct reinvestment, filling in vacant lots, creating greater identity for neighborhood and making streetscape more pedestrian-friendly. The crux of the plan is to create two dense commercial nodes at the 2 main intersections that already contain retail (Erie Street and Harvard/Bowdoin Streets) and encourage infill housing between these two nodes.		
Four Corners Plaza -Newmarket Site Redevelopment – CSNDC, BRA, 4CMS, DND	2006, project; re- planning	4CMS worked with city on RFP for city owned parcel; originally planned retail development did not come to fruition. Project was put out to bid again in 2011. CSNDC submitted a proposal; developer designation expected in 2012		
Mid Dorchester Action Plan – Draft Development Guidelines – BRA lead, with 4CMS	2009-2010	Land use & design guidelines for the 20 City-owned parcels within 4CMS District		
157 Washington Street mixed use development – CSNDC	Planned completion 2011/12	New mixed use development project by CSNDC close to the 4C train station – 24 limited equity coops & retail		
Work with property owners to encourage improvements	On-going			





Strategies	Status	Results
Market & Business Data Collection/Analysis		
Business District Conditions Assessment, Business Inventory, Business Mix analysis (BRA & 4CMS)	2009	Completed inventory, good base of information, info to guide business dev. efforts
Market assessment (BRA & 4CMS)	2009	Useful data to include in business recruitment materials & guide recruitment efforts
Cultural/Promotional events		
Develop & undertake events	On-going	Established several successful, well attended community events:
		Dining on Main Street (tour of local restaurants)
		Café Four Corners – entertainment &food from local restaurants (filled to capacity)
		Movie Night
		Groovin to Motown Annual Fundraiser

Strategies	Status	Results
Business Recruitment/ Deve	lopment	
Market the district to prospective businesses	On-Going	A few new business have opened in the last few years. The most significant was Mod, a trendy women's clothing store right next to the new train station (and then Mod for Men). The store was able to attract customers from outside the neighborhood, used creative marketing strategies, held fashion shows, etc. however, ultimately the store closed.
Create Business Development Goals & Priorities	2009/2010	ER Committee created a document to guide business recruitment efforts and to communicate goals to property owners including: business development goals, types of businesses to target for recruitment, types of business to be discouraged, desirable business operating and physical characteristics, target market segments, etc.
Establish "scorecard", criteria for evaluating new businesses & development	Done in 2010	Facilitates constructive discussion when business owners approach 4CMS for support
Research potential business	On-going	Researched several potential business opportunities including development of a Mercado (which 4CMS still is interested in but has not been able to implement)

Strategies	Status	Results
Business Assistance		
Business Networking	On-going	Conduct monthly business meeting
Provide assistance with licensing/ regulatory issues, storefront consultation, marketing	On-going	Assisted several businesses
Physical Improvement		
Facilitate Storefront Upgrades; Encourage attractive signs and storefront design	On-going	Several storefronts have been improved.
Work toward securing resources for sidewalk & streetscape improvements	2008 - 2009	Over \$1 million of infrastructure improvements (street and Mother's Rest Park)
Other		
Promote safety in 4CMS	On-going	

Activities that have been Particularly Impactful

- Urban Village Concept plan
- Mid Dorchester Action Plan/Development Guidelines for 20 City Owned parcels (BRA/DND)

Challenges

- Four Corners Main Street is currently undergoing transition after the departure of long-time executive director and resignation of some of the Board members. The Board appears to be re-grouping.
- A new director has been hired, however she is currently out on a leave of absence due to family circumstances.

Previously Completed Plans: Four Corners

Mid Dorchester Action Plan – Draft Development Guidelines 2009 – 2010 (for the City-owned parcels within the 4CMS District)

By/with/for: Boston Redevelopment Authority, 4CMS

Urban Village Concept Plan 2003

By/with/for: Stull & Lee, 4CMS Board and staff

Bowdoin Geneva Business District

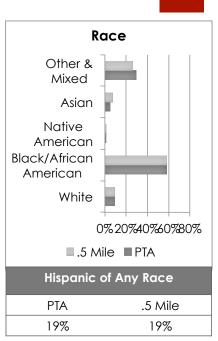
Market Analysis & Business Information

- Market Assessment Completion Date: 2009
- Business District Inventory/Mix Analysis Completion Date: 2009
- By/with/for: FinePoint Associates, Boston Redevelopment Authority, Economic Restructuring Committee Bowdoin Geneva Main Street, Boston Main Street,

Trade Area Demographics (2008)

	Duites aug :	
Market Characteristics	Primary Trade Area (PTA)	.5 Mile Radius
Population	14,308	19,283
Number of Households	4,140	5,710
Median Age	27.9	28.0
Avg. persons per Household	3.41	3.34
Owner-Occupied	33%	31%
Households with Children	55%	54%
Households with no vehicle	36%	38%

PTA = area where most of the repeat customers live PTA Boundaries were estimated based upon information from community representatives regarding local shopping patterns, competing commercial facilities and socio-economic barriers



^{*.5} mile from intersection of Bowdoin and Topliff, <u>not Station</u>

Income & Spending (2008)

Resident Income	PTA	.5 Mile Radius
Median Household Income	\$46,701	\$45,696
Average Household income	\$56,901	\$55,799
Per Capita Income	\$16,803	\$16,752

Annual Resident Expenditures (millions)	PTA	.5 Mile Radius
Eating & Drinking Places	\$14	\$19
Furnishings, Electronics/ Appliance, Bldg. Supply	\$9	\$12
Food & Beverage Stores	\$19	\$25
Health & Personal Care Stores	\$4	\$6
Clothing & Accessories	\$7	\$10
General Merchandise	\$8	\$10
Other Retail	\$2	\$2
Total	\$63	\$84

Potential Opportunities

Analyses indicated that residents living in the PTA make approx. \$39 million of retail & restaurant expenditures outside of the PTA.

The most significant leakage is in the following categories:

- Clothing
- Home furnishings
- Electronics & Appliances

Resident Market Description:

predominantly moderate income families with children (mix of family types), rich blend of cultures (e.g., African American, Cape Verdean, Caribbean, Latino, White)

Other Market Segments

Area Employees/ Businesses

175 businesses, 1,300 employees (in PTA)

Other District Features/Assets

- Residents prefer to shop locally ---about one-third do not own cars
- 12,000 vehicles per day pass thru the Business District bring potential customers
- The Bowdoin Geneva Health center, located in the heart of the Commercial District, attracts close to 1,000 visitors per week.
- There are several city-owned parcels in the District (i.e., one over 10, 000 s.f., two between 5,000 and 10,000 s.f. and two between 2,000 and 5,000 s.f.)

Business & Real Estate Data

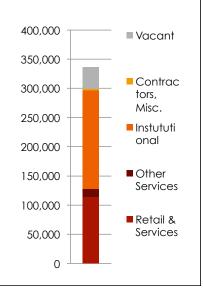
■ Information Date: 2009

Vacancy: 11% (of first floor space)

Number of Businesses: 78

Commercial/Institutional Space: 340,000 s.f. (approx.)

	#	S.F.
Retail	24	45,000
Restaurants	11	19,000
Personal Services	17	21,000
Professional Services	7	28,000
Other Services	4	14,000
Institutional	13	169,000
Contractors, Mfg. Misc	2	2,000
Vacant Commercial Units	12	38,000



Bowdoin Geneva Business District

Revitalization Strategies

Primary Revitalization Organization:

- Bowdoin Geneva Main Street (BGMS)
- Staff: 1 full time

Community Development Corporation Service Area:

Dorchester Bay Economic development Corporation (DBEDC)

Strategies	Status	Results		
Encourage & Guide Real Estate Development				
Mid Dorchester Action Plan – Draft Development Guidelines – BRA lead, with BGMS	2009-2010	Land use guidelines for City-owned parcels within the BGMS District		
Business Recruitment/ Develop	ment			
Create Business Development Goals & Priorities	2009/2010	ER Committee created a document to guide business recruitment efforts and to communicate goals to property owners including: business development goals and desirable business characteristics.		
Business Assistance				
Business Networking	On-going	Conduct business networking receptions		
Provide assistance with licensing/regulatory issues, storefront consultation, marketing	On-going	Assisted several businesses		
Physical Improvement				
Facilitate Storefront Upgrades; Encourage attractive signs and storefront design	On-going	Five storefronts have used Restore program to make improvements		

Strategies	Status	Results
Market & Business Data Collection/Analysis		
Business District Conditions Assessment, Business Inventory, Business Mix analysis (BRA & BGMS)	2009	Completed inventory, good base of information, info to guide business dev. efforts
Market assessment (BRA & BGMS)	2009	Useful data to include in business recruitment materials & guide recruitment efforts
Cultural/Promotional events		
Develop & undertake events	On-going	Organized community events including "Another Holiday Jazz Night" (December, 2010 and 2011)

Activities that have been Particularly Impactful

- Technical assistance, interaction with businesses
- Serving as liaison to City Departments to secure services for the District

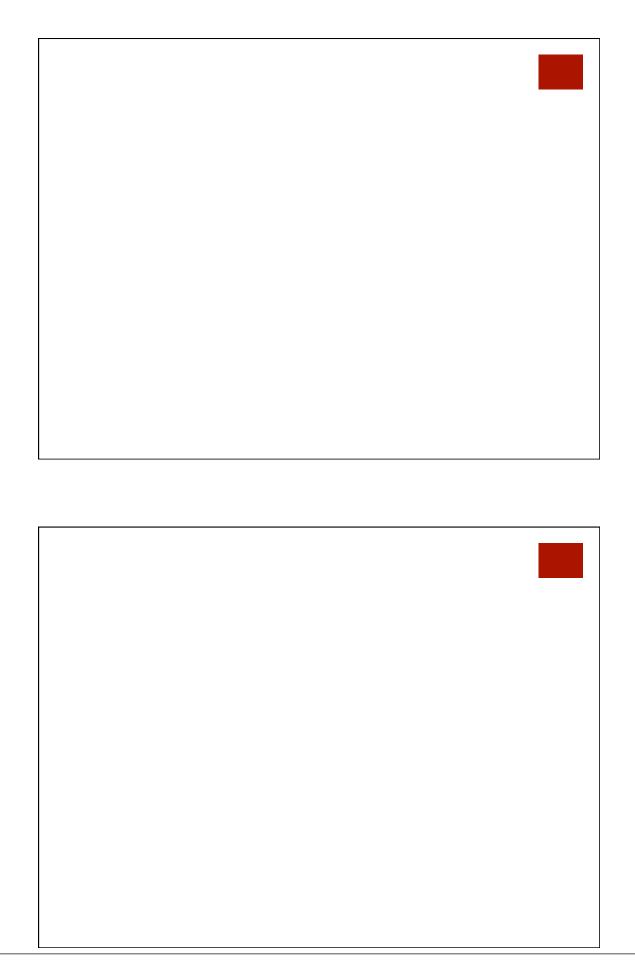
Challenges

- This neighborhood is often portrayed in the media as an extraordinarily high crime area, especially stigmatizing it, making promotion of the business district particularly difficult
- Fundraising is challenging, limited resources within the neighborhood; have to go outside to fundraise
- Limited staff resources 1 person

Previously Completed Plans: Bowdoin Geneva

Mid Dorchester Action Plan – Draft Development Guidelines 2009 – 2010 (for the City-owned parcels within the BGMS District)

By/with/for: Boston Redevelopment Authority, BGMS





Blue Hill Ave./ Cummins Highway (Mattapan)

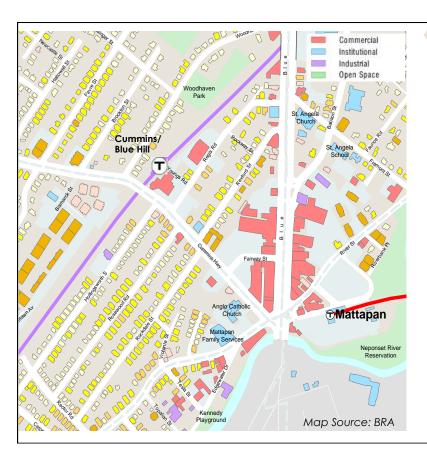
Foundation Research for Station Area Commercial Revitalization Planning

Blue Hill Ave./ Cummins Highway

Station Area Assessment

Projected Ridership by Year 2025: 230 Weekday Boardings*

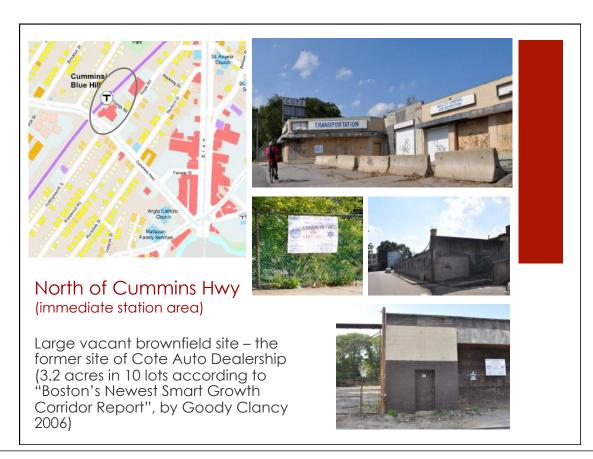
*Assuming increased peak and off peak service frequency Source: "Fairmount Line Feasibility Study", MBTA, KKO and Associates, 2002

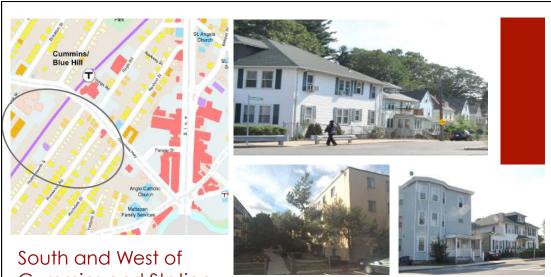


Chair of Surr ng Ar

Station will be located between Blue Hill Ave a Cummin overpu.

Immediate area:
large vacant
commercial site
and residential,
many 1 and 2 family
homes, some
apartments
Near Mattapan
Square Business
District (Blue Hill
Ave) but feels
somewhat removed

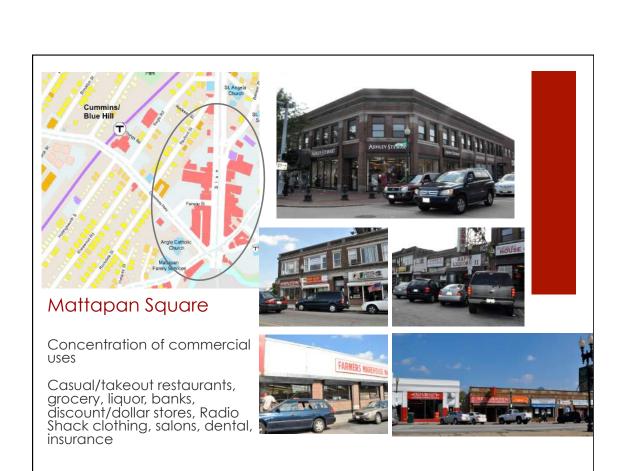


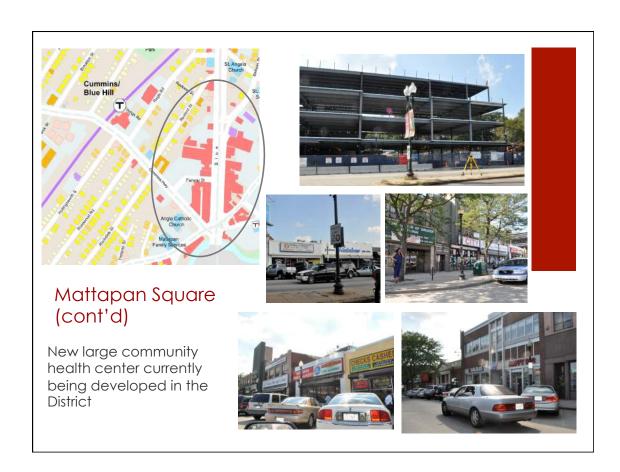


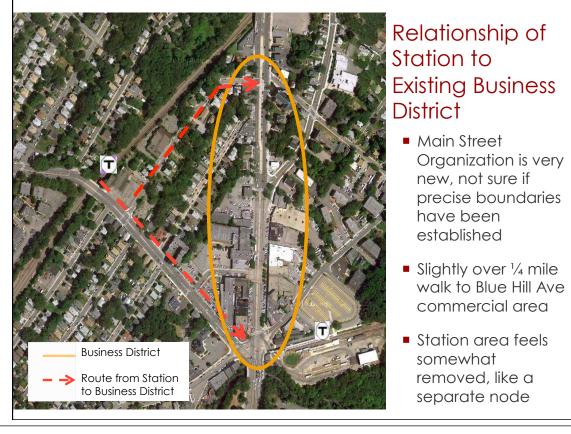
Cummins and Station

Residential area -- 1& 2 family homes, appears to be a lot of homeowners south of Fairmount line, west of Cummins Highway; Some apartment complexes on Bismark Street

Not much business activity other than dry cleaners and Burger King, about .2 mile from station









Mattapan Square Business District

Market Analysis & Business Information

- Market Assessment Completion Date: 2006, Mattapan Economic Development Initiative Study included consumer survey results and limited demographic data
- Business District Inventory/Mix Analysis Completion Date: 2006, for the MEDI Study area, larger area than Mattapan Square
- **By/with/for**: Mattapan Community Advisory Group, Boston Redevelopment Authority, Abt Associates, Inc.

Trade Area Demographics (2000)

Market Characteristics	Mattapan
Population	19,724
Number of Households	NA
Median Age	NA
Avg. persons per Household	NA
Owner-Occupied	NA
Households with Children	NA
Households with no vehicle	NA

Race

Mattapan has been a neighborhood to which waves of immigrants have gravitated. The most recent groups to settle have been Haitians and others of Caribbean heritage. It is estimated that African Americans and individuals of Caribbean heritage make up 90% of the population in Mattapan.

Consumer Survey (2006) Potential Opportunities

The consumer survey and consultant analysis of purchasing power suggested there might be opportunity for:

- Grocery store (respondents asked for higher quality)
- Drugstore (respondents asked for more centrally located store)

Other businesses frequently mentioned by survey respondents when asked what goods and service they would like to see in the area include:

- Sit-down, "quality restaurant
- Department store
- Higher quality clothing women & men's)
- Bookstore

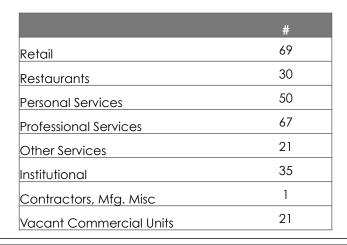
Business & Real Estate Data (*Data is for the MEDI Study Area which covers more than just Mattapan Square)

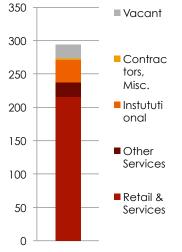
■ Information Date: 2006

Number of Businesses: 273

Commercial/Institutional Space: NA ■ Vacancy: 7%

 All percentages are based on number of units, square footage data is not available





^{***}only limited market data was available in the MEDI documents

Mattapan Square Business District

Revitalization Strategies

Revitalization Planning/Work to Date Completed by:

Mattapan Economic Development Initiative Team

New Organization recently formed to serve as Primary Revitalization Organization:

- Mattapan Square Main Street
- Staff: 0 at present, will be hiring a director

Community Development Corporation Service Area:

Mattapan Community Development Corporation (MCDC)

Strategies	Status	Results
Market & Business Data Collection/Analysis		
Business Inventory (MEDI Team)	Limited data from 2006	Business inventory was completed in 2006 for the MEDI study area, the only information available in the documents is a total tally of the number of businesses by type (no business names or addresses, no square footage data)
Consumer Preference Survey (MEDI Team)	Completed in 2006	Survey was administered; 105 respondents, 52% residents, 43% non residents
Land Use, Zoning & Urban Design		
Enact Zoning Changes to encourage mixed use along commercial corridors (MEDI City with Community Implementation Team)	Complete	New zoning regulations will nominally increase the amount of density and building heights in the business districts and discourage uses that detract from a healthy and pedestrian friendly environment.
Develop Urban Design Guidelines	Complete	Guideline written to foster high quality development that creates opportunities for residents to shop, live, and gather together as a community.

Strategies	Status	Results
Business Expansion and New Business Recruitment		
Hire Business Development Managers (City)	Done	Two Business Development Managers were hired and have provided assistance to many businesses along Mattapan's commercial corridors including coordination of meetings with business operators & property owners to introduce them to municipal and private sector services available to help them expand or improve their property (e.g., Restore Program, Boston Local Development Corporation)
Main Street Organization		
Create a Mattapan Square Main Street Organization	Organization Created, not yet staffed	Organization had their first visioning session Sept. 15, 2011 to determine what residents want to focus on.
		The next step will be to develop a business plan for the organization and hire a director

Strategies	Status	Results
Other		
Infrastructure & Amenities Improvement	Goals in MEDI Action Agenda	 Goals established in MEDI Action Agenda: Improvement traffic flow Provide signs to rout cars to existing parking As redevelopment occurs, look for opportunities to create additional parking facilities Improve the pedestrian environment and provide amenities
Improve Public Safety	Approach cited in MEDI Action Agenda	 Four pronged approach was cited in MEDI Action Agenda: 1. Support community-wide efforts to address youth & gang violence 2. Address any security issues at parking facilities 3. Deal with broader public perception of crime 4. Increase policing at night to coincide with expanded operating hours

Previously Completed Plans: Mattapan

Mattapan Economic Development Initiative Action Agenda 2006

By/with/for: Mattapan Community Advisory Group, Boston Redevelopment Authority, Abt Associates, Inc., Icon Architecture, Planners Collaborative, Guzman Architects and Dr. Dennis Derryck



Fairmount Station

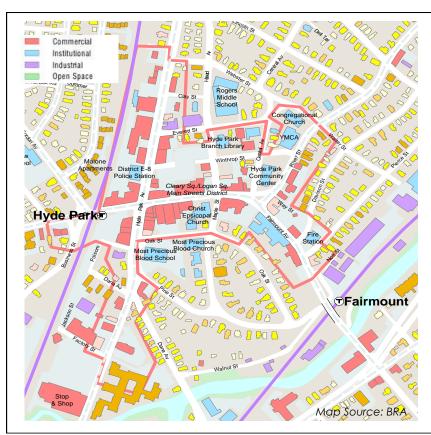
Foundation Research for Station Area Commercial Revitalization Planning

Fairmount

Station Area Assessment

Projected Ridership by Year 2025: 830 Weekday Boardings*

*Assuming increased peak and off peak service frequency Source: "Fairmount Line Feasibility Study", MBTA, KKO and Associates, 2002

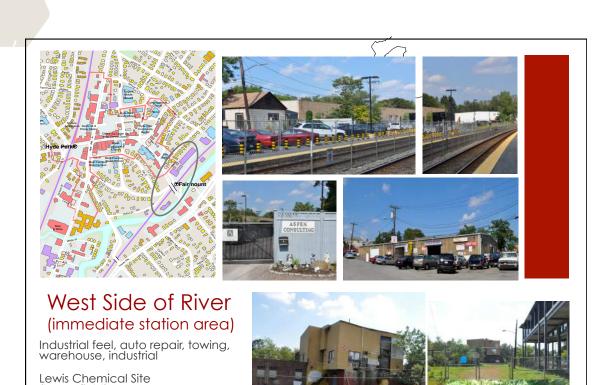


Character of Surrounding Area

Adjacent to Neponset River (attractive view; development could open riverfront up for public use)

Close to established commercial area (Logan/Cleary Square a.k.a. Hyde Park Main Street District)

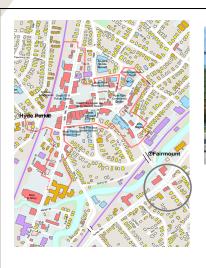
Immediate area: industrial/auto



(brownfield)

not accessible

Riverfront could be attractive recreational/aesthetic asset, but

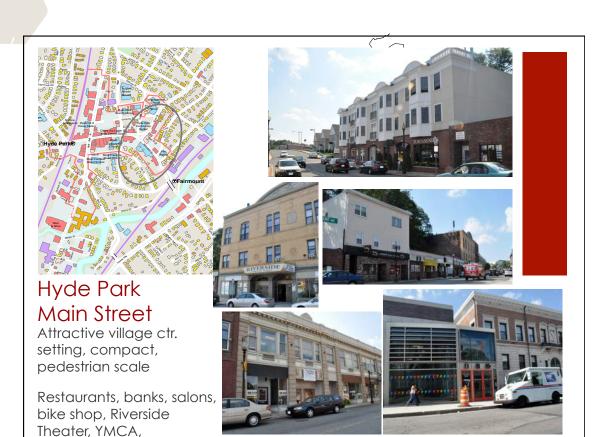




East Side of River (immediate station area)

Few small retail (coffee shop, salon, laundry, convenience store)

Medical plaza



Community Center, some multi-family residential



Hyde Park Main Street (cont'd)

Discount stores, hardware, more restaurants

Medical offices, institutional uses, insurance, tax, real estate offices

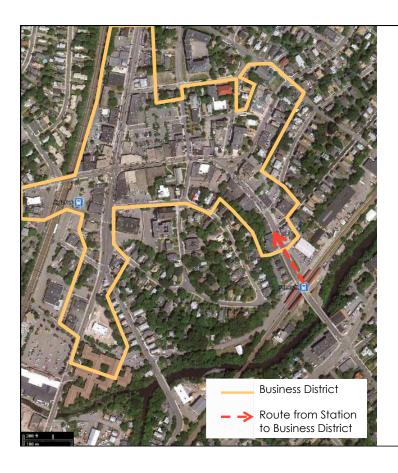
Shaw's Supermarket



Mixed Use Development Proposed

Southwest Boston CDC (SWBCDC) and Codman Square NDC (CSNDC), in a joint venture, recently proposed a mixed use development project near the Fairmount Station; project raised some community concerns and proposal has now been withdrawn





Relationship of Station to Existing Business District

- Not technically within existing Main Street Boundaries, but very close
- Short walk (1 minute, < .1 mile) to District
- There are also a few retailers outside of HPMS District on the east side of River







 Connecting route to business district has sidewalks, more pedestrian friendly than many other Fairmount Corridor stations, but not particularly inviting/attractive for potential customers

Hyde Park Business District

Market Analysis & Business Information

- Market Assessment Completion Date: 2009 (information date 2008)
- Business District Inventory/Mix Analysis Completion Date: 2009
- By/with/for: ConsultEcon, Inc., Karl Seidman Consulting, BRA, Hyde Park Main Street

Trade Area Demographics (2008)

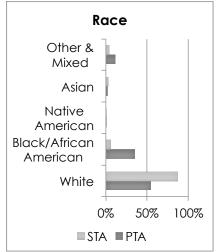
Market Characteristics	Primary Trade Area (PTA)	Secondary Trade Area (STA)
Population	49,313	59,331
Number of Households	17,496	23,456
Median Age	36.9/40	41.8
Avg. persons per Household	2.82	2.53

PTA includes: Hyde Park and Milton Census Tracts (CTs) 4161 and 4162.

STA includes: West Roxbury CTs 1301, 1302, 1303, 1304.01, 1304.02; Milton CTs 4163, 4164 and Dedham CTs 4021.01, 4021.02, 4022, 4023, 4024, 4025.

***STA does not include population in PTA

Resident Market Description/Segments: multigenerational, with children, young adults and seniors being important segments. Minority groups are prevalent and diverse. Area households are economically diverse resulting in considerable variation in regular and discretionary consumer spending.



Hispanic of Any Race	
PTA	STA
13%	9%

Income & Spending (2008)

Resident Income	PTA	STA
Median Household Income	\$63,941	\$72,682
Average Household income	\$79,678	\$93,126
Per Capita Income	\$28,270	\$36,817

Annual Resident Expenditures (millions)	DTA	ST A
experianores (minions)	PTA	STA
Eating & Drinking Places	\$57	\$89
Household Supplies	\$51	\$81
Food & Beverage Stores	\$82	\$129
Health & Personal Care Stores	\$22	\$35
Clothing & Accessories	\$42	\$66
Entertainment Equipment	\$40	\$63
Other Retail	\$27	\$49
Total	\$321	\$512

Potential Opportunities

Potential Niche: Urban arts, culture & entertainment district (anchored by Riverside Theater Works)

Businesses targeted for recruitment:

- Sit-down restaurants
- Arts related businesses
- Quality used goods store

Existing Clusters:

- Food, Arts & Entertainment
- Convenience Goods & services
- Discount Retail

Other Market Segments

Area Employees/ Businesses

 385 businesses and 3,700 employees in Hyde Park neighborhood

Curry College

Approx. 4,000 students

Other District Features/Assets

- Well served by public transportation including 2 commuter lines and 4 bus routes
- Historic Character and sense of place
- Home to many strong community institutions large YMCA, several major banks, library, and community center
- Good location for urban entertainment and restaurants -- Home of the Riverside Theater Works

Business & Real Estate Data

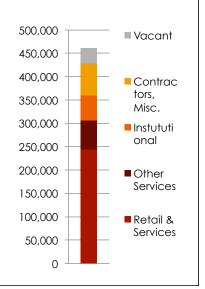
■ Information Date: 2009

■ Vacancy: 23%

■ Number of Businesses: 178

Commercial/Institutional Space: 460,000 s.f. (approx.)

	#	S.F.
Retail	35	101,000
Restaurants	26	36,000
Personal Services	21	26,000
Professional Service, F.I.RE	45	81,000
Other Services (incl. arts & entertain)	16	62,000
Institutional	15	54,000
Contractors, Mfg. & Misc	20	68,000
Vacant Commercial Units	32	33,000



Hyde Park Business District

Revitalization Strategies

Primary Revitalization Organization:

- Hyde Park Main Street (UCMS)
- Staff: 1 full time and 1 part time

Community Development Corporation Service Area:

Southwest Boston Community Development Corporation (SWBCDC)

Strategies	Status F	Results	
Niche Development/Business Recruitment			
Expand product offerings	On-going	Many new businesses have opened. 11 new businesses opened in in the first half of 2011. Several of the new businesses reflect the types of businesses identified in the market study to complement existing clusters. Examples include: Justine's dancewear (arts related), Annabelle's (sit down restaurant and Drifter's (restaurant/lounge). The Switch is a new enterprise that recently opened near the Theater, it is a pop-up store facility that rents to businesses that need temporary space. HPMS operates a successful Farmers Market with crafts (hopes to incubate new business to locate in the District)	
Recruitment campaign	Planned	Need to develop collateral materials	
Business Assistance			
Offer one-to-one business development services	On-going, limited, would like to do more	HPMS helps businesses with permitting issues, logo design, storefront/sign design	
Monthly Business Networking Breakfast	On-going	HPMS continues to host networking sessions and bring in pertinent speakers.	

Private Property Improvements/Real Estate Development				
Work with property owners to encourage improvements	On-going	HPMS has been working with largest landlord in the District, now beginning a project to combine 2 empty storefronts and make major improvements to Dana Block including renovation in the back of buildings facing municipal parking lot.		
		Encouraged the owner of 1925 River Street to do more comprehensive restoration project including more appropriate windows and sign band.		
Encourage resolution of health & safety code violations	On-going	HPMS did walk thru of businesses with team from ISD to inform businesses about violations and advise them to address issues		
Window Display Initiative	Conducted Window Display Contest last December – will probably not repeat	Put a lot of effort into helping businesses participate in citywide contest; Design Team removed stored merchandise, cleaned up windows, helped with displays, in hope that merchants would be inspired to keep windows clean and uncluttered after contest. By and large, this did not result in improved cleanliness or keeping merchants from filling store windows up with storage boxes and other clutter.		

Strategies	Status	Results			
Private Property Improvements/Real Estate Development					
"Oldest Wood Bldg" Historic Restoration - HBI	On-going	HBI purchased & is renovating property on Fairmount Ave for apartments above & first flr retail; will ensure retail tenant has regular business hours (current bike shop tenant only operates part time)			
Everett Theater- New Marquee & Restoration	On-going	Owner is completing renovation of marquee and front entrance with a Browne Fund Grant & HBI TA; HPMS plans to hold a red Carpet event to celebrate completion			
New Zoning for Commercial District – BRA Initiative	BRA is heading this effort; Neighborhood Plan is complete, New Zoning Article will soon follow	Recommendations include: area around Cleary/Logan Squares & Fairmount Station will comprise a Neighborhood Shopping Subdistrict (NS-2), will allow 2-3 stories, maintain 40 ft. max. height, disallow auto repair/related uses, employ an Overlay District requiring all projects go through design review			

Strategies	Status	Results
Public Improvements		
Improve Pingree Parking lot	Completed 2011	HPMS got volunteers to repaint parking lot stripes, fix fence and clean shrubs (HPMS manages the lot)
Infrastructure Improvements	2010 - City	New bump outs on Hyde Park Ave, new light poles in Cleary Square, moving the bus stop & shelter
Streetscape/ Beautification	On-going	HPMS hung hanging baskets on River Street Bridge last summer and implemented holiday decorations for Christmas
Develop attractive gateways at key locations	Planned	
Encourage installation of public art throughout Squares to support local arts scene & enliven area	Planned	

Strategies S	tatus	Results			
Events and Programming, "Destination Hyde Park" Branding Campaign					
Develop a lively calendar of events throughout the year	On-going	HPMS participates in & promotes "Destination Hyde Park"- week-long celebration			
		HPMS puts on many events including:2 Pub Crawls last FY – December and May			
		 Women's History celebration with a 5-week Thursday night film series – March 			
		• Traffic Jam Concert Series - Fridays in July/Aug.			
		 Farmers Market – July – Oct, big success, brought diverse mix of customers, attracted lots of foot traffic, 200 -300 customers/day; recruited CSA farm to participate and recruited members 			
		Annual Fundraiser – "Patio Party – Sept.			
Organization and Capacity					
Explore storefront location	2009 plan	This strategy was cited in 2009 plan but HPMS is not pursuing.			
Outreach new partners	On-going				

Activities that have been Particularly Impactful

- Events that reinforce "Destination Hyde Park" branding
 Increased community spirit, has begun to change image, business & resident membership has grown, and brought many community organizations working together
- Storefront and property improvements

Challenges

- Negative Image is impediment to bringing in customers and new businesses
- Window displays and conditions inside the stores does not attract and may be deterring customers
- Could be a need for cross-cultural marketing training for (e.g., immigrant business owners need help in understanding expectations of American consumers regarding merchandise, display, etc.)
- Limited capacity amount that can be done by 1.5 staff; volunteers help but still many duties fall to staff; events take a lot of time, many on-going responsibilities (e.g., website, fundraising, etc.)

Previously Completed Plans Retail Market Study and Action Plan for Cleary and Logan Squares 2009 By/with/for: ConsultEcon, Inc., Karl Seidman, BRA, Hyde Park Main Street Hyde Park Neighborhood Strategic Plan 2011 (including specific recommendations for development of a new zoning article for Hyde Park) By/with/for: Hyde Park Strategic Plan Advisory Group, BRA, DND, Boston Landmarks Commission, Boston Parks & Recreation, Boston Transportation Dept., Mayor's Office of Neighborhood Services Crosby/Schlessinger/ Smallridge, McMahon Associates, Byrne Mckinney & Associates, Bergmeyer Associates, Inc, Historic Boston, Inc