



UPHAM'S CORNER CULTURAL PLANNING

ARTS & INNOVATION DISTRICT MANAGING NEIGHBORHOOD CHANGE

JUNE 2018



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UPHAMS CORNER

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INTRODUCTION

OVERVIEW

LAUNCHING UPHAM'S CORNER AS AN ARTS & INNOVATION DISTRICT

Upham's Corner is undergoing changes to its commercial corridor and cultural facilities, creating an opportunity to strengthen the area as a cultural hub. The City of Boston is committed to investing in cultural facilities redevelopment as part of a broader strategy for stimulating creative community and economic development and revitalization that will help Upham's Corner thrive. The Community Vision from the City of Boston Upham's Corner Station Area Plan, adopted in 2014, states specifically that Upham's Corner should be defined as "a revitalized commercial, cultural and community center that is a celebration of diversity and an arts and cultural anchor of the Fairmount Indigo Corridor." Imagine Boston 2030, the city-wide plan completed in 2017, identifies Upham's Corner as an Enhanced Neighborhood Pilot that is community-led and city-catalyzed. The Upham's Corner Pilot includes investments and policies in arts and culture, transportation, open space, housing, and economic development to strengthen the area's historic fabric, enable economic development and local innovation, support arts and culture, preserve affordability, and prevent displacement. The acquisition of parcels near the Strand Theater for development of a new Upham's Corner Branch Library and adjacent housing and arts and culture uses by the City of Boston and Dudley Street Neighborhood Initiative have led Upham's Corner to the precipice of significant neighborhood investment and change.

In an effort to mitigate the impact of this change on Upham's Corner residents, the City of Boston Mayor's Office of Arts and Culture, the Mayor's Office of Economic Development (MOED), and the Boston Planning and Development Agency (BPDA) — with support from the Department of Neighborhood Development (DND) — engaged the Metropolitan Area Planning Council (MAPC) to assess commercial and residential vulnerability to displacement, identify strategies and best practices for mitigating displacement, and engage in outreach to establish opportunities to leverage the neighborhood's existing assets — particularly the Strand Theatre — to support neighborhood-based workforce development initiatives. This report is a synthesis of arts-centered research and planning support delivered to MOAC, MOED, BPDA, and DND that aims to support the continued implementation of Boston Creates and Imagine Boston 2030 at the neighborhood level.

The concept of an Arts & Innovation District emerged as a way to combine the power of the Strand Theatre as an arts asset with a new Upham's Corner Branch Library and emerging small-scale entrepreneurship in the area supported by the Fairmount Innovation Lab, the Transformative Culture Project, and other cultural and community-based organizations. In Phase One of the project, MAPC's Arts & Culture Division and Land Use Department identified district approaches to strengthen Upham's Corner as a cultural hub and examined the potential of the Strand Theatre to serve as a major cultural facility accommodating a broader mix of uses. In Phase Two, MAPC's Arts & Culture Division and Housing and Economic Development groups focused on identifying strategies to ensure that forthcoming redevelopment efforts support the residents and businesses that have established Upham's Corner as a cultural and commercial hub for Dorchester's diverse ethnic communities. This Phase Two cultural planning work builds on Phase One research compiled by MAPC for MOAC in fall 2016 and spring 2017. An important impetus for this report is the opportunity to reimagine the City-owned Strand Theatre as part of a larger cultural complex that would include a new neighborhood library facility — anchoring a community and economic development strategy for the neighborhood.

MAPC began work in September 2017 with outreach and data collection and analysis and presented the synthesis of that research along with their findings in a series of memos submitted to the City of Boston between January and June, 2018. These memos have been consolidated into the chapters and sections that comprise this report.

STUDY CONTEXT

Upham's Corner plays an important role as a commercial and cultural hub serving diverse communities of color in Boston. Its diversity is anchored by its African American and Hispanic/Latino populations, which account for 39% and 26% of the area population respectively.¹ Within these populations are a variety of ethnic communities, including those with roots in Cape Verde, Haiti, the Dominican Republic and Vietnam.² The strength of neighborhood commercial activity in Upham's Corner lies in its role as a hub of ethnic culture serving these immigrant communities and native-born communities of color in Boston. Its anchor supermarket, Brothers Supermarket, advertises its "wide variety of American, Latin American, Haitian, Caribbean and Cape Verdean Products," on its website. Restaurants, beauty salons, and barbershops advertise the diverse communities they serve through the languages on their signage, the images they display, the food they serve, and the products they sell.

Upham's Corner's diversity reflects many elements of Boston's overall population: white (10%), Hispanic or Latino (26%), black (39%), Asian (3%) and other (22%). In fact, the zip code that includes Upham's Corner (02125) was named one of the top ten most diverse neighborhoods in the United States by Trulia as reported by Forbes in November of 2012. Residents of Upham's Corner have lower rates of educational attainment than the City of Boston as a whole, with 62% of the Upham's Corner population 25 years or older having no more than a high school education, compared to 49% for Boston. This may contribute to the disparity in median household income, with 68% of Upham's Corner residents considered low-income compared with 51% of Boston residents.³

Transportation Access

Much of Upham's Corner falls within a quarter mile radius of the Fairmount Indigo commuter rail line and several bus lines. Therefore the neighborhood is considered an opportunity-area for transit-oriented development. The area's transportation access is likely to be enhanced as efforts are underway to pilot increased service on the Fairmount Indigo Line.⁴ MBTA Route 15 traces former streetcar routes through Upham's Corner with stops along Dudley Street. Route 15 will hopefully be improved as part of the MBTA's Key Bus Route Improvement Program. The Station Area is also served by Routes 16, 17 and 41.

CULTURAL ANCHORS: THE LIBRARY AND THE THEATRE

The Strand Theatre is the primary cultural anchor for the Arts & Innovation District concept that emerged out of neighborhood planning processes. In addition, the development of a new, revamped Upham's Corner Branch library adjacent to the theater represents an opportunity to deepen the impact of both anchors through coordination and co-location of related uses.

Construction of the Strand Theatre – Boston's first movie theater – in 1918 increased Upham's Corner importance as a commercial and cultural center of activity. The theater capitalized on existing commercial activity in Upham's Corner and added a cultural attraction to this burgeoning commercial center. The Strand's operations under the management of the M. Harriet McCormack Center for the Arts provides a model for the theater as both a citywide and neighborhood serving cultural resource. The McCormack Center for the Arts showcased art forms that grew out of African American communities including jazz, rap, hip hop, and tap and created a Producers Series that trained neighborhood residents to produce their own shows. The Strand Theatre is now owned and operated by the City of Boston. At the direction of city staff, MAPC

¹ Upham's Corner Station Area Plan, 2014, p. 14.

² *Imagine all the people series, City of Boston, 2016: "Dominicans," p. 10; "Cape Verde," p. 9; "Vietnamese," p. 11.*

³ Per HUD definitions, low-income households are those with incomes below 80% of the HUD Area Median Family Income (HAMFI). HAMFI is not necessarily the same as that derived from Census or ACS data, as it undergoes a series of adjustments.

⁴ Bill H2723 An Act establishing a rapid transportation pilot for the Fairmount corridor was introduced in the 2018 Legislative session.

conducted research to examine the funding and operating models of other successful multi arts facilities serving as anchors in other parts of the country. Important insights gleaned from the case study analyses include the importance of non-performance programming to financial feasibility for the Gordon Square Community Theatre, innovative housing financing to cross-subsidize arts spaces at the Schermerhorn House, and the importance of multi-arts programming at the BRIC Media House. Please refer to Appendix A for detailed findings from these case examples.

As the needs of performing arts organizations have changed over time, the potential benefits to redeveloping the Strand Theatre to accommodate a wider variety of uses has grown more apparent. The Performing Arts Facility Assessment Report of 2017 demonstrated an unmet need for rehearsal space in Boston as well as a need for performance spaces with seating between 400 and 600 seats and sophisticated technical amenities. While performing arts facilities with a seating capacity above 1,000 are the third most common type of space, the facilities assessment identified only three facilities in the 400- to 600-seat range.⁵

DISTRICT STRATEGIES FOR MANAGING NEIGHBORHOOD CHANGE

Overview of the Massachusetts Cultural District Program

The Massachusetts Cultural Council (MCC) manages the Cultural District Designation (CDD) program of the Commonwealth. This program provides a small start-up grant to launch new cultural districts, which are set within a walkable geographic area and are overseen by a managing partnership structure. The program recommends establishing a governing committee structure to build and sustain partnerships among managing entities, municipalities, arts and culture anchors, local businesses, and active local community members. Typically, the managing entity establishes a Board of Directors consisting of primary anchor organizations, businesses, and municipal representatives with subcommittees tasked with directing public art, programming, and business development within the district. The cultural district model creates opportunities to build collaborative relationships among individuals, artists, local businesses, and organizations. The boundary of the district establishes a distinct geography that can be translated into a zoning overlay that uses land use regulations to achieve a district vision. It could also become the geographic underpinning of a Business Improvement District or Parking Benefits District that establishes a funding source to sustain district activities. The committee structure is flexible and can be adapted to coordinate activities based on the local priorities of district municipalities and neighborhoods.

Effective cultural districts have an established structure that includes sustained funding for a staff person to manage its operations, programming, and promotion activities. Should the City of Boston strive to obtain official Cultural District Designation for Upham's Corner, a crucial first task is to enter into the managing partnership and to assist in funding a staff position to manage the Arts & Innovation District, who will be tasked with establishing and managing a committee structure governing the Arts & Innovation District. Typical district responsibilities include stakeholder engagement and coordinated workforce development, business development and marketing, and maintaining a robust schedule of arts and culture programming across District.

Applying strategies for managing neighborhood change to a district model

This report outlines several strategies by which the City can organize an Arts & Innovation District in order to manage neighborhood change and mitigate displacement.

Land Use Regulations for Cultural District Overlay

Establishing an Arts & Innovation boundary would allow for the creation of a zoning overlay that expands allowable uses to match the vision for the district as a center of arts activity and nightlife and provide a

⁵ Boston Performing Arts Facility Assessment, Draft for Public Comment, July 2017. TDC.

narrow geography in which to pilot regulations restricting Formula Retail or programs that support legacy businesses.

- Codify Arts & Innovation District through zoning amendments that expand allowable uses to include after-hours live music entertainment, light manufacturing, or artist studios. This change in use is unlikely to lead to commercial displacement and would reflect the goals of the Arts and Innovation District as informed by strong community participation.
- Explore use of cultural district zoning overlay to restrict formula retail and support legacy businesses contributing to the cultural identity of the Arts & Innovation District.
- Explore use of cultural district overlay to pilot more stringent Condominium Conversion Ordinance that limits the number of rental units that can be converted to condominiums within a ¼ mile radius around the district boundary.

District Strategies for Mitigating Commercial Displacement

The district can also provide an opportunity to pilot strategies to mitigate commercial displacement risk using a business development subcommittee as a way to structure collaboration among Upham’s Corner Main Streets, Fairmount Innovation Lab, the Transformative Culture Project, Dorchester Bay Economic Development Corporation, the Upham’s Corner Health Center, and owners of anchor businesses and small businesses at risk of displacement. Such a subcommittee or subcommittees could advance the following recommendations:

- Monitor commercial displacement risk and connect businesses to city support, particularly among businesses renting in properties at risk of foreclosure due to tax liens.
- Build relationships with the area’s long-term businesses (more than 20 years old) and support their ability to remain in the Upham’s Corner Main Street District.
- Encourage production of commercial space that will accommodate business types appropriate for the Arts & Innovation District, for example by requiring new developments to provide smaller commercial spaces less than 500 sq. ft. and 500 – 1000k sq. ft. in size.
- Integrate the Fairmount Innovation Lab’s activities and the business community’s expertise and services with the traditional neighborhood businesses in the Arts & Innovation District.
- Coordinate cultural anchors and organizations to develop opportunities for youth and adult workforce development programs related to the performing arts, marketing, construction, and food service.

District Strategies for Mitigating Residential Development

Affordable housing and affordable artist housing is a priority for the City of Boston and the residents of Upham’s Corner. Analysis done by the City of Boston’s Department of Neighborhood Development highlights that more than half of Upham’s Corner households are currently at a moderate or elevated risk of displacement. See page 49 for details of this analysis.

- Increase the supply of deed-restricted affordable artist housing in the district.
- Establish an Upham’s Corner Artist Housing Task Force as a district subcommittee to monitor the impact of new development on artists in the district and surrounding neighborhood.
- Conduct workshops through the district to assist local artists with Artist Certification to ensure eligibility for new affordable artist housing.
- Task district subcommittee with monitoring neighborhood change, identifying need for technical assistance to address issue, and coordinate with appropriate City departments to establish a response.

In addition to providing greater detail on these district tools, the following chapters highlight in detail a variety of strategies to manage neighborhood change through policies, programs, and capacity building at the neighborhood and city scales.



MANAGING NEIGHBORHOOD CHANGE

MANAGING NEIGHBORHOOD CHANGE: MITIGATING COMMERCIAL DISPLACEMENT

CONTEXT

In the Upham's Corner Implementation planning process, neighborhood residents have advocated for increased commercial vitality in the neighborhood with the specific goal of leveraging the Strand Theatre as a cultural anchor for the community. Participants and community leaders have articulated a vision for a lively streetscape with restaurants and other establishments that provide community gathering space. At the same time, the community has expressed strong concerns that gentrification and displacement will result from new development. More specifically, residents have expressed fear that the community's diversity will be lost and that a redeveloped Strand Theatre will lose its connection to the neighborhood's communities of color. Because the cultures of Upham's Corner's diverse communities are embedded in its small-scale retail stores, restaurants, and personal services providers, understanding the risk of commercial displacement can help assess the risk of cultural displacement in Upham's Corner.

COMMERCIAL DISPLACEMENT INDICATORS: DIRECT AND INDIRECT

At MAPC, we understand gentrification and displacement as two distinct, but related terms. MAPC has defined these terms as follows:

Displacement: A change in neighborhood demographics in which long-time residents are compelled to leave due to rising housing costs (e.g. prices, rents, and property taxes) and a decline in availability of affordable goods and services due to redevelopment and/or an influx of new residents with advantages that may include age, income, education, or access to family resources.

Gentrification: Refers to a particular type of neighborhood change defined by an increase in housing costs and an influx of new, higher-income residents; often coincides with lower-income residents moving out of a neighborhood due to rising housing costs.

Because displacement is an impact that can be tracked and measured in a variety of ways, it is the focus of this analysis. Similar to residential displacement, commercial displacement can be evaluated in terms of direct and indirect causes. Differentiating between these two forces and understanding them individually may help policy makers in crafting and implementing intervention strategies to mitigate their impacts. To assess the risk of displacement in Upham's Corner, MAPC has developed an indicator framework for evaluating these different forces. For the purposes of this document, MAPC has defined direct and indirect displacement in the following ways:

Direct Commercial Displacement

Direct displacement is a process by which a business is displaced due to physical or market impacts on an individual building that a particular business occupies. Some examples of this could be parcel redevelopment (tear down or significant construction), foreclosure of a building due to unpaid tax liens, or mounting pressure from city fines.

Indirect Commercial Displacement

In contrast, indirect displacement can be understood as the process by which government policy, market economics, or consumer preference can impact prices and the stability of a commercial area. Examples of activities that may trigger indirect displacement are adjustments to area zoning or allowable use groups, market speculation by the real estate industry, and changing area demographics. These definitions are derived from MAPC's working definitions of gentrification and displacement as related to residential populations.

MAPC Commercial Displacement Indicators

This table lists a number of indicators that could be tracked to evaluate the risk of commercial displacement in an area and inform the type of policies that could mitigate that risk or guide decision making to attain desired uses and commercial mix.

Please see the [Appendix F: Commercial Displacement Indicator Source Literature for the sources used to inform the selection of these indicators](#)

<u>Indicator</u>	<u>Direct / Indirect</u>	<u>Description</u>	<u>Measurement</u>	<u>Source</u>
Available FAR and density	Direct	Property(ies) that are underbuilt and have available market potential for construction are more likely to be redeveloped, thus impacting existing businesses.	Lot assessment of built FAR and density vs available FAR and density.	Boston Assessors Records
Lot agglomeration	Direct	Aggregating multiple lots to increase buildable area is a common development scheme. If many continuous parcels are under the same ownership the property owner may have a market incentive to redevelop under a larger footprint. A continuous row of smaller sized lots owned by individual owners may be attractive for a large investment.	Assessment records and ownership address cross check. Properties listed for sale. Size of available properties.	Boston Assessors Records, Suffolk County Registry of Deeds or other resource (Moody's Analytics), Survey
Permitting and regulation	Direct	Businesses that become subject to ongoing fines and permitting fees may be unable to continue operations. If fines are a result of an issue pertaining to certificate of occupancy, businesses may not be able to address the issue without assistance from a landlord. Landlords may not be interested in retaining tenants.	Track business violation trends by business type.	Boston City Clerk's Office, Survey
Foreclosure risk	Direct	As a result of rising property values, some building owners (businesses or private individuals) may become vulnerable to tax liens due to an inability to cover increased property taxes. Unpaid tax liens can be sold to a financial institution and ultimately be used as a tool to foreclose on a property, which may lead to displacement of current occupants.	Properties with tax liens.	Suffolk County Registry of Deeds or other resource (Moody's Analytics)
Rising rents - property tax pass through	Direct	As properties increase in value due to an area becoming more desirable or in response to a signal of new investment commercial owners may pass on new property taxes to tenants.	Track assessors data for indication of property value increases. Track lease agreements with tenants.	Boston Assessors Records, Survey

MAPC Commercial Displacement Indicators

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<u>Indicator</u>	<u>Direct / Indirect</u>	<u>Description</u>	<u>Measurement</u>	<u>Source</u>
Lease conditions	Direct	Businesses without a lease, or with short term leases, are vulnerable to displacement at the will of market conditions.	Tracking leasing information among business owners.	Survey
Change in allowable use as a result of rezoning	Indirect	Changes to allowed uses change the potential profit range for a property. Adding additional types of commercial, office, or residential uses may change the underlying building and land value depending on its present use and function.	Track use changes as a result of rezoning or allowed special permits or variances in the area of concern.	BPDA Records
Rising rents - market inflation	Indirect	Demand for commercial real estate may also drive prices. Low vacancy rates, high absorption rates, and continuing demand may squeeze out business operations that have a lower profit margin than the market is demanding.	New rental rates, absorption, vacancy.	CoStar or other resource, survey
Market Speculation	Indirect	Property owners may participate in market speculation when there is an anticipated market or government action. This speculation could take the form of land banking or property flipping. Both actions can impact a rental market.	Commercial property sales. Commercial property land banking (properties held vacant for long periods of time).	Suffolk County Registry of Deeds or other resource (Moody's Analytics), Area Survey
Changing residential demographics	Indirect	Residential gentrification can be a precursor to commercial displacement as property owners will see new residents as a market for new goods and services that are not currently met and may motivate them to change commercial tenants.	New market rate residential development.	BPDA Records

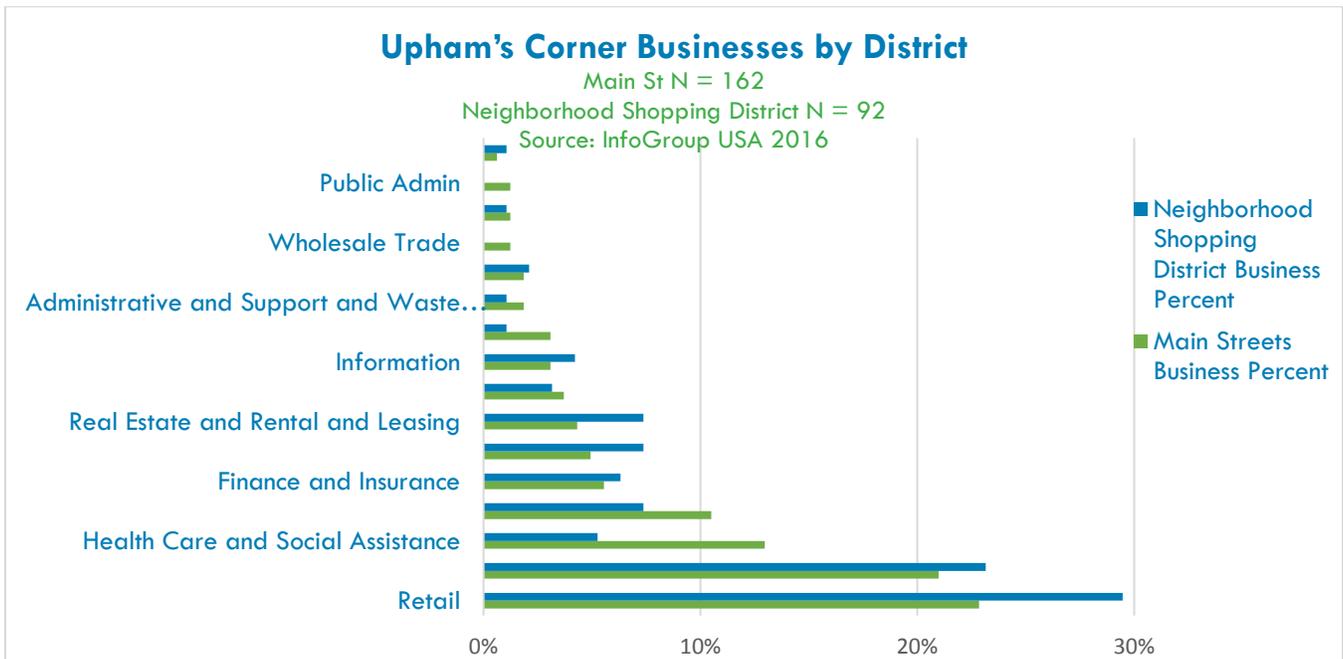
INDICATOR ANALYSIS

The following section aims to use the above indicators to evaluate possible mechanisms for commercial displacement within the Upham's Corner area. The key findings from this analysis are as follows:

- The major existing risk factor for commercial displacement in Upham's Corner is the steadily increasing value of commercial property, which is likely to impact rents.
- Adjustments to local zoning, or the granting of variances to allow additional density, may make properties that are not seen as development soft sites today susceptible to market forces in the future.
- There is a possibility that some parcels in the Upham's Corner area could be vulnerable to foreclosures, which may impact small businesses that rent within those properties.

Business Composition by Zone

The Upham's Corner Main Street District crosses the borders of several BPDA-defined zoning designations including the Upham's Corner Neighborhood Shopping Subdistrict, 3 Family Residential, 2 Family Residential, and Multi Family Row House designations. Within the Upham's Corner Main Street District there are approximately 162 businesses.⁶ The majority of those businesses are located within the Upham's Corner Neighborhood Shopping (NS) district. The only sectors that have a strong presence within the Main Street District outside of the NS zoning district are healthcare and food establishments. This is likely due to the many individual health practitioners present at the Upham's Corner Health Center and the fast food cluster at the northern end of Columbia Road. As the majority of the Main Street District's businesses as well as commercial land is located within the NS subdistrict, the indicators outlined in the section above are evaluated with a focus on this subdistrict.



⁶ InfoGroup USA 2016.

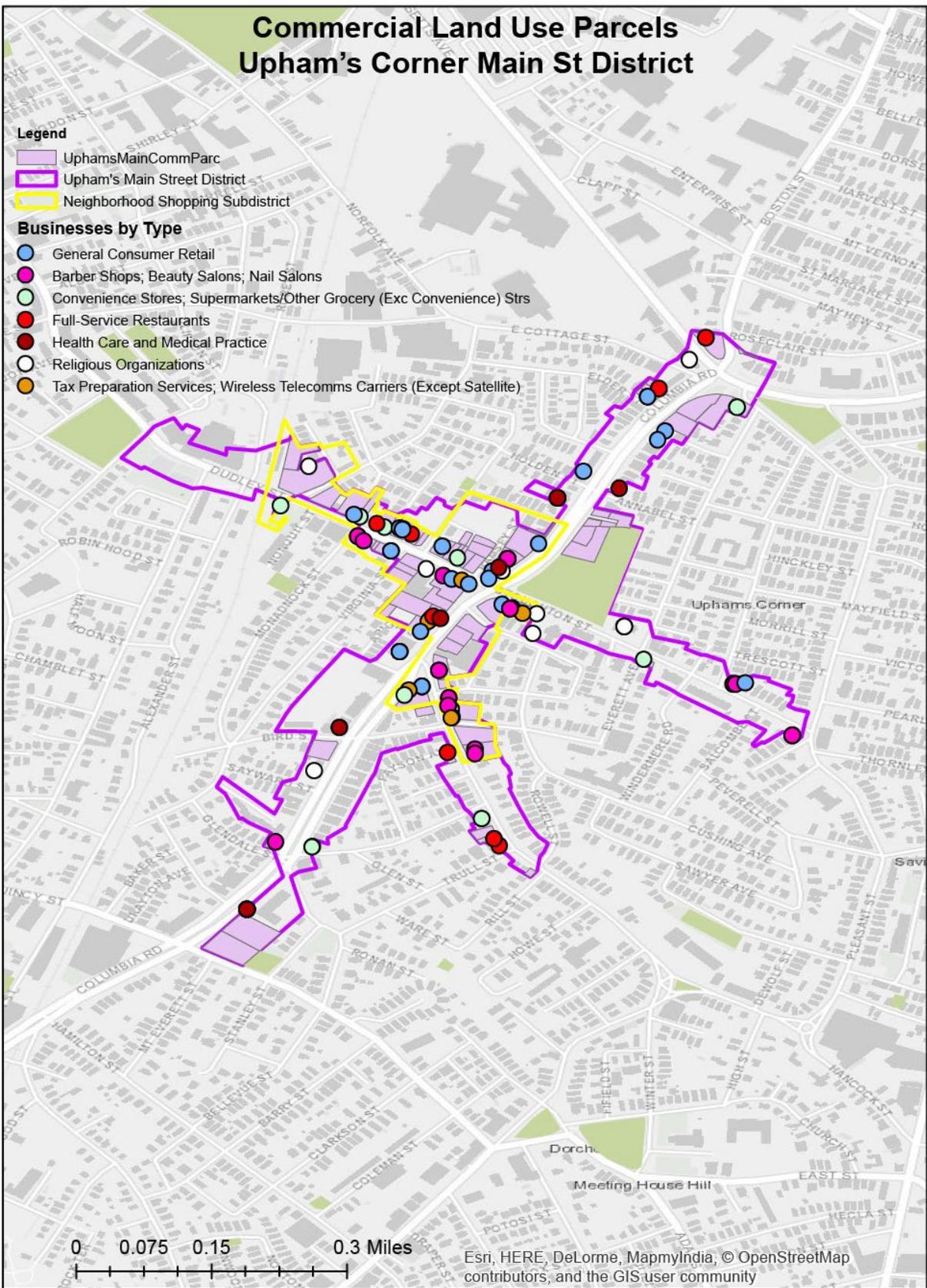
Commercial Land Use Parcels Upham's Corner Main St District

Legend

- Upham's Main Comm Parc
- Upham's Main Street District
- Neighborhood Shopping Subdistrict

Businesses by Type

- General Consumer Retail
- Barber Shops; Beauty Salons; Nail Salons
- Convenience Stores; Supermarkets/Other Grocery (Exc Convenience) Strs
- Full-Service Restaurants
- Health Care and Medical Practice
- Religious Organizations
- Tax Preparation Services; Wireless Telecomms Carriers (Except Satellite)



0 0.075 0.15 0.3 Miles

Esri, HERE, DeLorme, MapmyIndia, © OpenStreetMap contributors, and the GIS user community

Available FAR and Density Analysis

The current Neighborhood Shopping (NS) subdistrict zoning in Upham's Corner allows for an FAR of 1. The majority of the existing structures in the subdistrict exceed this FAR limit as they were built prior to the introduction of this zoning restriction.⁷ The majority of the parcels that conform to FAR limits and have an FAR of less than .5 are parking lots. Only two sets of parcels feature built structures with a used FAR of less than .5, and only one of those is currently used by small businesses: 16 - 26 Hancock St.⁸

Under current zoning conditions it is unlikely that businesses are at risk of displacement due to redevelopment of existing structures. As outlined in the Upham's Corner Station Plan report, financial feasibility for new development would likely require the existing zoning to be adjusted to allow for greater density. The scenarios outlined in the report recommend densities of 2.3 – 3.9 FAR to support new development with an overall zoning adjustment of 2 for the entire district. Even an adjustment of FAR to 2 may not spur redevelopment of the district's characteristic single-story commercial buildings.

Further evidence that the current FAR restrictions hamper redevelopment in Upham's Corner can be seen in a development proposal for 734 Dudley St, a single-story multi-tenant commercial building typical of the Upham's Corner neighborhood shopping district. The property owner is seeking an Article 80 approval for an FAR adjustment to 3.9 as part of a mixed-use development proposal. The development proposal would reduce the existing 4 units of ground-floor retail to 3 and add 20 residential units on 4 upper stories. This is stepped down from an earlier proposal that proposed 40 residential units on 7 floors with 3 units of ground-floor retail. If approved, the proposal at 734 Dudley St would displace at least one of the existing commercial tenants via the reduction in commercial units. For the remaining tenants, it is neither clear whether they would be able to afford rent for larger, newly built-out spaces nor where they would operate during construction.

Lot Agglomeration

Cross-tabulating owner names with owner mailing addresses did not reveal any significant effort to consolidate parcels in Upham's Corner for redevelopment. While there does not appear to be a recent consolidation trend, owners of existing consolidated parcels are exploring development opportunities. Mariana Realty, which owns Wheelock Hall and adjoining parcels on Arion Street, has made an effort to sell the building as a redevelopment opportunity.⁹ The listing has since gone off line and it is unclear as to whether the parcels were sold, are currently in contract, or if the seller has decided to remove the parcels from the market.

While it does not appear that efforts to consolidate parcels for large-scale redevelopment is occurring in Upham's Corner, several individual sites in the area that have recently been marketed for sale are worth noting. These sites include 33 Hancock St, which has a contentious history in the neighborhood as a bar and restaurant,¹⁰ and 653 Columbia Road, which houses a dental office and adjoining residence. The Conservatory Lab Charter School had submitted an Article 80 application for the demolition of the existing industrial building at 353 Columbia Rd but appears to have pulled out of that plan as the parcel was recently relisted for sale.

Change in Allowable Use as a Result of Rezoning

The Upham's Corner Station Area Plan recommends an across-the-board rezoning of the NS Subdistrict to increase allowable density as discussed earlier. The Station Area Plan does not mention introducing new use groups. The current use allowance in the Upham's Corner NS District do not allow as of right for after-hours live music entertainment, light manufacturing, or artist studios. As the City refines its vision for the

⁷ Only 5 of the 85 commercial parcels in Upham's Corner were constructed after 1970 – Assessors Records

⁸ See Appendix A and B for mapping documents

⁹ Loopnet listing, since removed from.

¹⁰ <https://www.dotnews.com/columns/2016/story-betrayal-33-hancock>

Arts & Innovation District, it may want to consider expanding the allowable use groups to reflect the goals of the Arts and Innovation District as informed by strong community participation.

Since housing is allowed as of right in the NS Subdistrict it is unlikely that adjustments to the use groups would impact existing businesses. In contrast, an increase in density could have an impact on existing business displacement as illustrated above in the section, “Available FAR and Density Analysis.”

Changing Residential Demographics

US Census Data does not indicate that the residential composition of Upham’s Corner has changed significantly since 2010. See MAPC Residential Displacement Memo for details. This finding indicates that existing commercial businesses are likely not at risk of displacement due to changing consumer preferences or spending power in the area.

Foreclosure Risk

A review of deed records for all commercial properties within the Upham’s Corner NS Subdistrict revealed that 13 properties have tax liens or have been taken by the City due to unpaid taxes. The table below and accompanying map illustrate the address and ownership information for these parcels. Many of these parcels are currently occupied by small businesses and, should the property be foreclosed on, may be at risk of displacement.

The BPDA should coordinate with the City Clerk’s office to ensure that the information displayed in the following table is up to date and to identify any action that property owners may have taken recently to address tax liens. Pending that coordination, the BPDA and Upham’s Corner Main Street should notify and track business occupants renting within those properties. Using the recently completed Upham’s Corner business survey the City should evaluate the lease conditions of the businesses occupying these potentially vulnerable properties.

Properties with Commercial Tax Liens - Upham's Corner NS Subdistrict

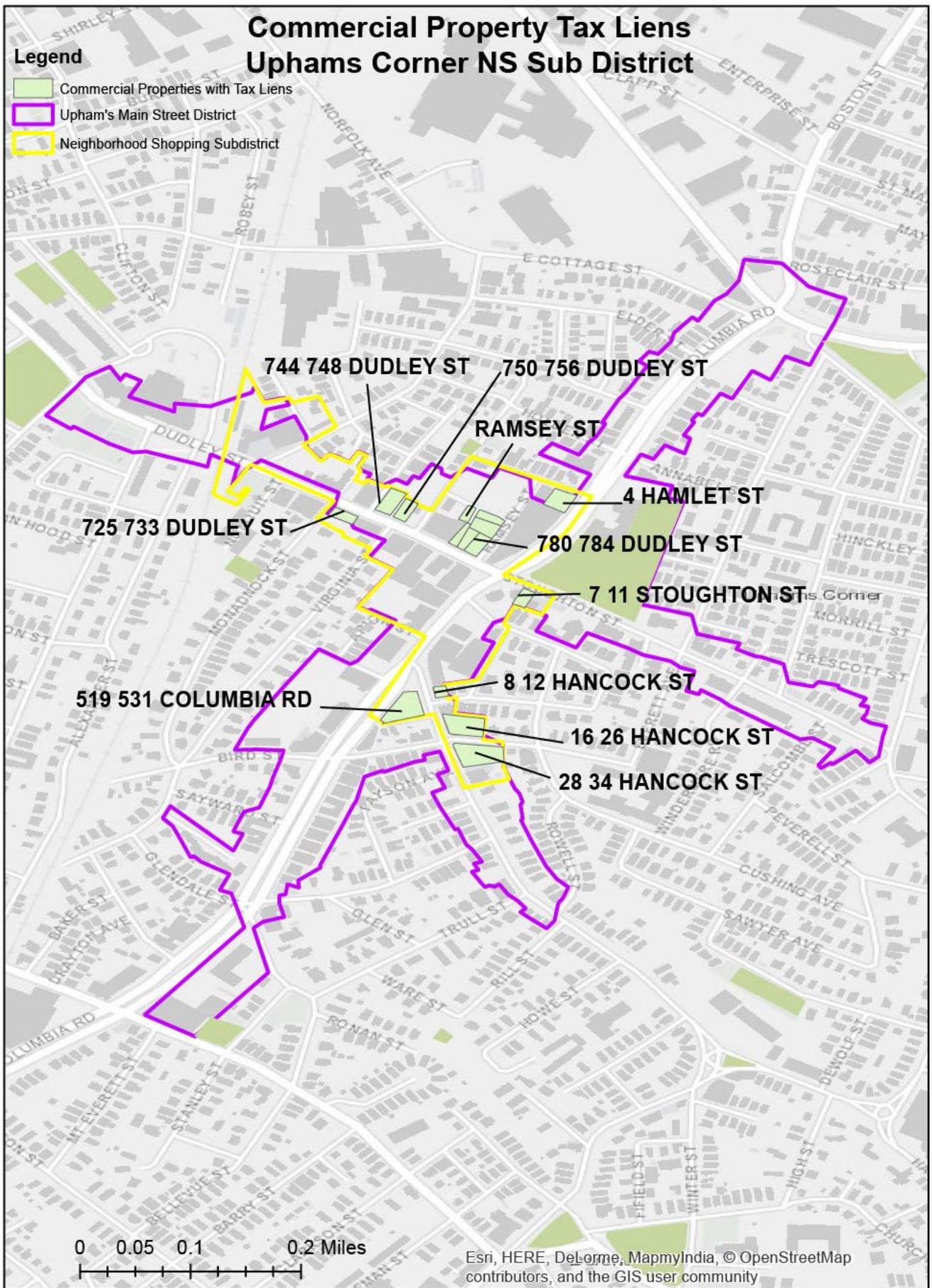
Source: Suffolk County Registry of Deeds

<u>Address</u>	<u>Owner</u>	<u>Class Description</u>	<u>Lien or other</u>	<u>Amount</u>	<u>Date of Lien or Taking</u>
725+733 DUDLEY ST	YK PROPERTIES LLC	Commercial Property / STRIP CTR STORES	Municipal Lien Certificate	\$10,352	9/1/2017
744+748 DUDLEY ST	YANG-CHAN YONG KUAN	Commercial Property / STRIP CTR STORES	Municipal Lien Certificate	\$2,379	8/5/1999
750+756 DUDLEY ST	750 DUDLEY ST LLC	Commercial Property / STRIP CTR STORES	Municipal Lien Certificate	\$4,581	8/26/2016
1 BELDEN SQ	DUDLEY STREET LLC	Commercial Property / PARKING LOT	Municipal Lien Certificate	\$12,612	1/18/2012
RAMSEY ST	DUDLEY STREET LLC	Commercial Property / RET/WHSL/SERVICE	Municipal Lien Certificate	\$95.04	2/2/2015
776+A776 DUDLEY ST	DUDLEY STREET LLC	Commercial Property / RET/WHSL/SERVICE	Municipal Lien Certificate	\$1,446	1/18/2012
778+A778 DUDLEY ST	DUDLEY STREET LLC	Commercial Property / RET/WHSL/SERVICE	Municipal Lien Certificate	\$1,991.36	1/18/2012
780+784 DUDLEY ST	DUDLEY STREET LLC	Commercial Property / RET/WHSL/SERVICE	Municipal Lien Certificate	\$2,991.36	1/18/2012
7+11 STOUGHTON ST	MOHAMMAD YASER I	Commercial Property / BAR/TAVERN/PUB	Notice of Taking by City of Boston	-	5/18/2017
8+12 HANCOCK ST	S & H BOSTON REALTY LLC	Commercial Property / BAR/TAVERN/PUB	Municipal Lien Certification	\$1,752	9/14/2015
519+531 COLUMBIA RD	OPHIR SHALOM BACHITS	Commercial Property / RET/WHSL/SERVICE	Municipal Lien Certificate	\$7,682	2/13/2009
16+26 HANCOCK ST	16 HANCOCK STREET LLC	Commercial Property / STRIP CTR STORES	Municipal Lien Certificate	\$5,359	12/1/2016
28+34 HANCOCK ST	433 FURNACE BROOK LLC	Commercial Property / RETAIL STORE DETACH	Municipal Lien Certificate	\$7,376	3/16/2016
4 HAMLET ST	TWELVE MOUNT VERNON STREET	Multiple use Property / RES /COMMERCIAL USE	Municipal Lien Certificate	\$6,512	10/25/2017

Commercial Property Tax Liens Uphams Corner NS Sub District

Legend

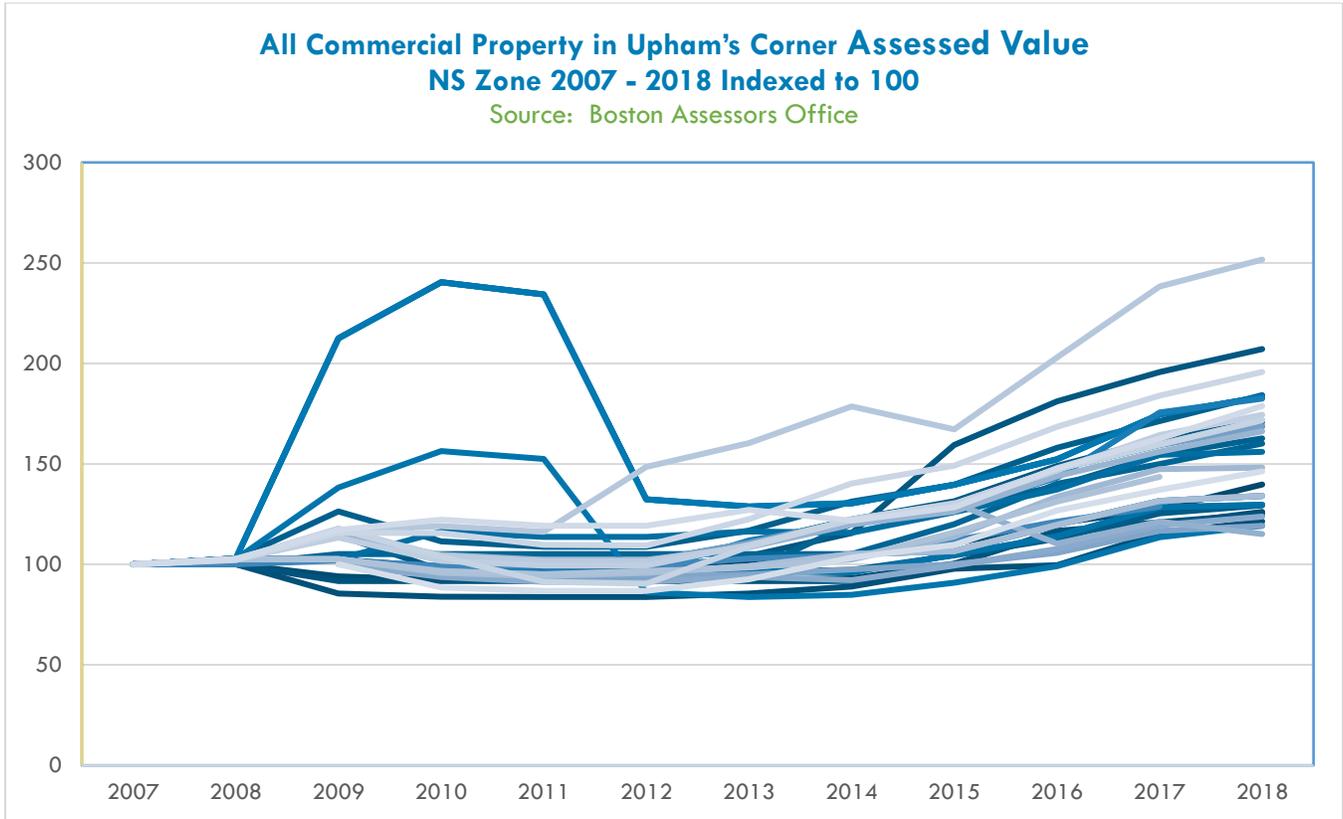
- Commercial Properties with Tax Liens
- Upham's Main Street District
- Neighborhood Shopping Subdistrict



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Assessed Property Value

Boston is in the midst of a well-documented and well understood population and development boom. This boom has spurred an increase in property values across the city and Upham's Corner has been no exception. Between 2007 and 2018 the median increase in value of commercial property in Upham's Corner was 38% with most of that assessed value being generated between 2015 and 2018,¹¹ as illustrated in the chart below. Inflation has only risen by 23% since 2007 indicating that the property owners are indeed paying more property tax in real dollars than in previous years.



Without market information gained from a data source such as CoStar or through business surveys it is difficult to evaluate whether property owners are indeed passing on increases in property taxes to tenants. Research in other municipalities, however, indicates that this is a common practice.¹² Seattle has recommended adjusting commercial property taxes to be dependent upon building income instead of assessed value, thus allowing owners to maintain affordable rents.

Market Speculation

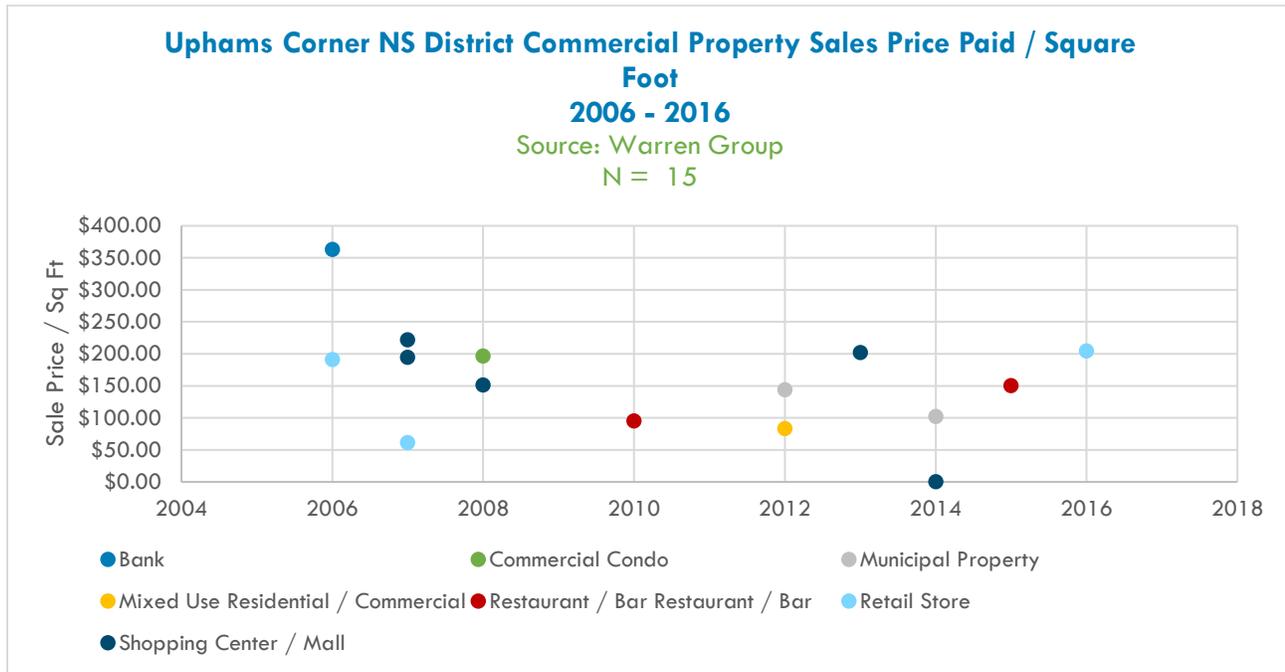
A review of Warren Group Sales Data 2007 - 2016¹³ did not exhibit clear signs of property flipping or inflated sales prices that would indicate wide spread market speculation. Within the NS Subdistrict there were only 19 commercial property sales over the 10-year time period with only three properties sold more than once: 17 Ramsey St, 28 Hancock, and 725 Dudley. The data indicate a dip in sales prices during the recession but relatively consistent sales of \$100 - \$200 per square foot over the 10-year time period.

¹¹ Median % Change 2007-2014 = 17%, Median % Change 2015 - 2018 = 30%

¹² Seattle Commercial Affordability Recommendations Report, 18

¹³ Most recent year available

The property sales data indicates that there is little variation of price among property types and little change in the frequency of sales occurring in the district over the years.



For those properties that sold more than once over the 10 year time period the change in sale price was quite varied between the three. The properties on Dudley and Ramsey St sold for less during their second transaction likely due to the financial crisis of 2008 playing a role in the devaluation of property values. Additionally, 17 Ramsey St was sold to DBEDC, a non-profit, which may have given the seller an incentive to sell at a lower price as they would be exempt from taxes that would be required upon sale to a for profit organization or private individual. 725 Dudley's second sale was to a private individual. In contrast to those sales, 28 Hancock sold in 2016 for more than double its 2007 sale price. Its second sale in 2016 happened well into the recession recovery and reflects the current booming urban marketplace. The sale at 28 - 34 Hancock is the most recent commercial property sale recorded in the available Warren Group data. As new data becomes available, the City should closely monitor sale prices for indications of prices that are outside of the documented market sales band.

Upham's Corner Properties Sold More than Once 2007 – 2016

Source: Warren Group

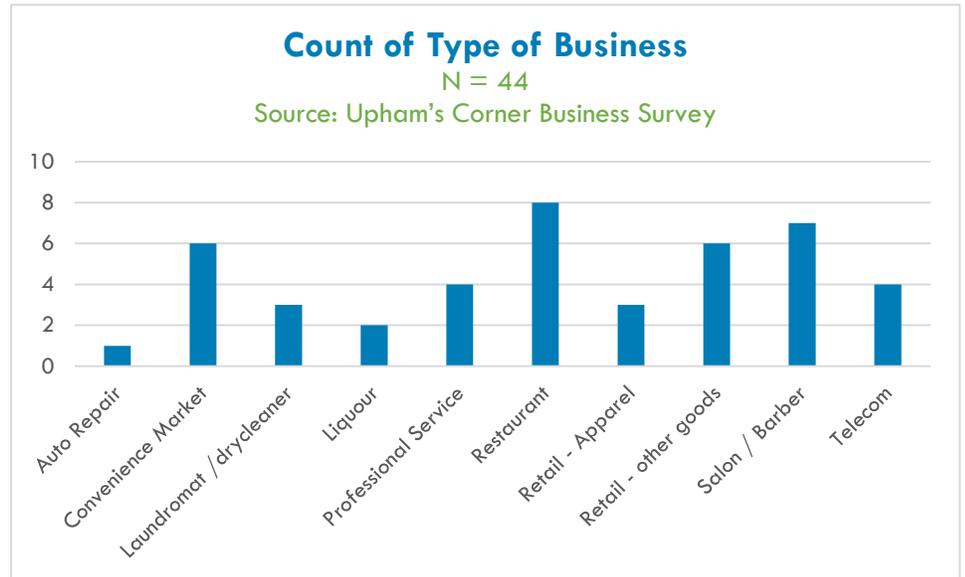
	2006	2007	2008	2010	2012	2013	2014	2015	2016	% Change in Sales Price
17 Ramsey St	-	-	-	-	\$518,655	-	\$366,888	-	-	-29%
725-733 Dudley St	-	\$865,000	-	-	-	\$787,500	-	-	-	-9%
28-34 Hancock St	-	\$820,000	-	-	-	-	-	-	\$2,725,000	230%

Land banking is a well-known issue in Upham's Corner and has been articulated through many previous planning studies. A prominent example is the Leon Electric Building, a vacant five-story structure that was used primarily for storage and warehousing before being vacated. It has been identified as a strategic parcel next to Upham's Corner station that could be a catalyst for further investment in the area should it be redeveloped.

2018 BUSINESS SURVEY RESULTS

In early 2018 the City of Boston conducted a survey of 45 businesses in the Upham’s Corner Main Street District using survey questions drafted by MAPC. Survey respondents represented a variety of business types from across the full Main Streets District with restaurants, salons / barbershops, and various retail establishments being the most frequent business types interviewed. Major area employers such as The Upham’s Corner Community Health Center and Brothers Market were not included in this survey. The survey asked the following questions:

1. Name of Business
2. Address
3. Type of Business
4. Square Footage
5. Number of Employees
6. Age of Business
7. Years Under Current Ownership
8. Rent or Ownership Status
9. Time Remaining on Current Lease
10. Description of Plans After Lease
11. What factors would influence your decision to continue operating a business in Upham’s Corner?



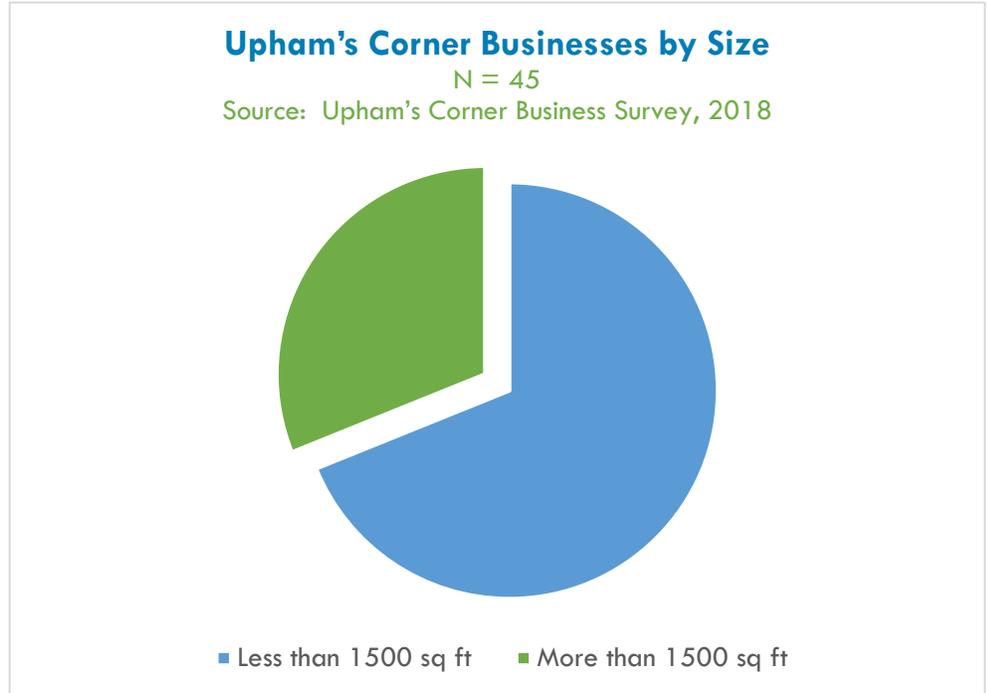
Analysis of the survey yielded a baseline of information with which the City can use to evaluate future neighborhood change. The survey also provided three significant insights that the City should use to inform its area implementation strategy.

Those key findings are:

1. The majority of businesses surveyed operate out of spaces 1500 sq ft in size or smaller.
2. Upham’s Corner has a significant number of long term businesses (more than 20 years old), but also a growing number of new businesses less than 5 years old.
3. The majority of businesses surveyed are currently under stable lease conditions and appear to be interested in remaining in the Upham’s Corner Main Street District.

Finding 1: The majority of businesses surveyed operate out of spaces 1,500 sq ft in size or less.

The majority of the businesses surveyed occupied spaces between 500 and 1000 sq ft with the most commonly cited spatial occupancy being between 500 and 1000 sq ft. In fact, 100% of convenience stores, salons / barbershops and telecom stores surveyed currently operate out of these smaller spaces. 63% of restaurants surveyed also occupy these smaller spaces along with 75% of professional services. Conversely, the businesses most likely to occupy larger spaces were existing retailers, laundromats and a few larger restaurants – a full breakdown of space used by size is illustrated in the following chart and table.



Upham's Corner Small vs Large Space Occupants

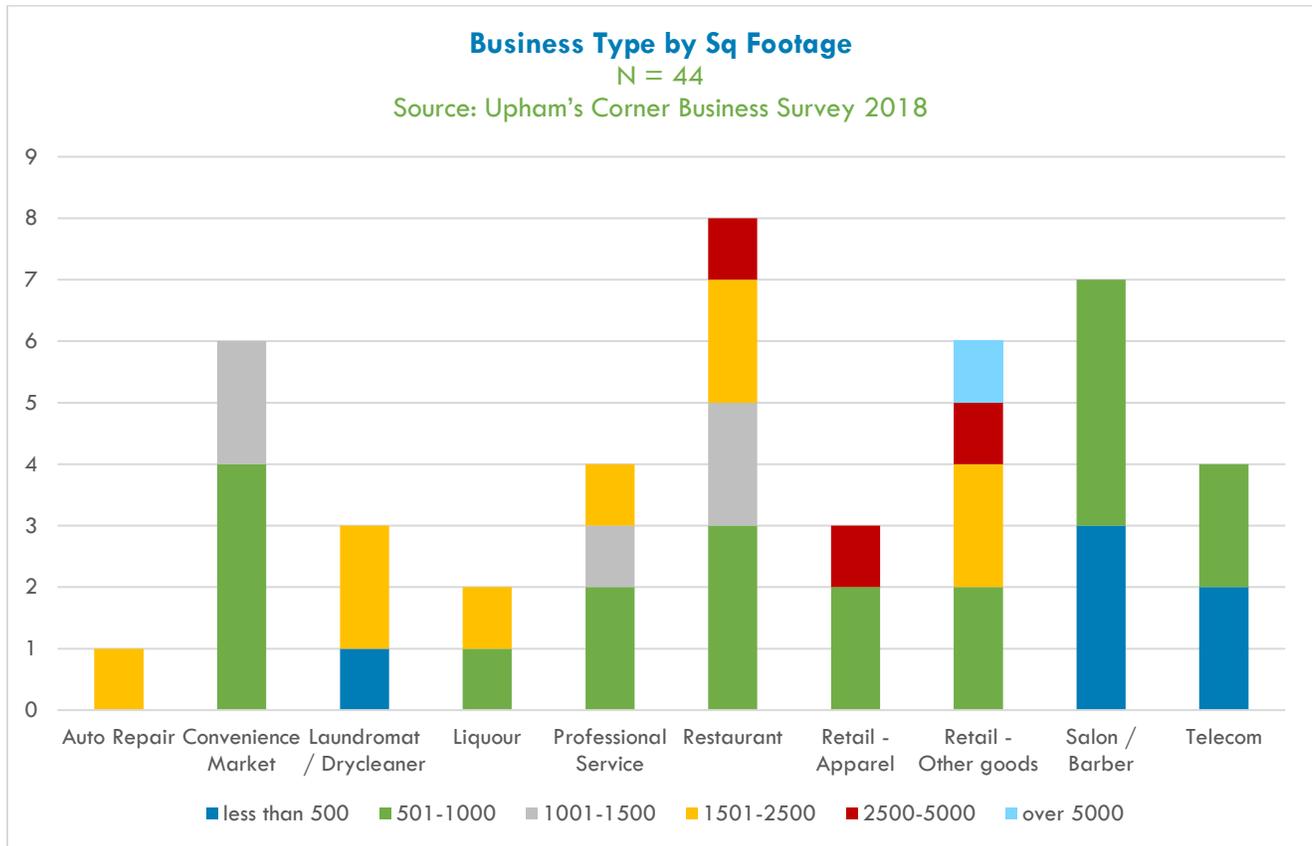
Source: 2018 Upham's Corner Business Survey

<u>Business Type</u>	<u>Percent of Businesses Surveyed Occupying Space Smaller than 1500 Sq Ft</u>	<u>Percent of Business Surveyed Occupying Space Larger than 1500 Sq Ft</u>	<u>Total Number of Businesses Surveyed</u>
Auto Repair	0%	100%	1
Convenience Market	100%	0%	6
Laundromat / Drycleaner	33%	67%	3
Liquor Store	50%	50%	2
Professional Service	75%	25%	4
Restaurant	63%	37%	8
Retail - Apparel	67%	33%	3
Retail - Other Goods	33%	67%	6
Salon / Barber	100%	0%	7
Telecom	100%	0%	4

As the City and its partners consider the business mix that they want to attract to Upham's Corner as part of the strategic implementation plan and Arts and Innovation District designation, they may want to consider ways to encourage the production of commercial space that will accommodate those business types. In the context of new development at the Strand Theatre and other strategic sites in Upham's Corner that will be issued through RFP, the City should include requirements for provision of smaller spaces in the less than 500 sq ft and 500 – 1000k sq ft range.

Supply of right-sized spaces is only one element of attracting a successful business mix – another key element is rental rates. The 2018 Upham's Corner survey did not include a question regarding current rental rates or trends in rental increases. The City of Boston should consider a review of rental information through broker networks, further interviews with businesses, or data purchased with a third party provider to

assess market rental rates across existing buildings and newly constructed or renovated spaces. As cited in the accompanying Stakeholder Interview memorandum, local CDCs and CBOs expect rental rates to increase in newly constructed commercial space. If new commercial space coming online in Upham’s Corner is not priced appropriately it may hinder the ability for local entrepreneurs to access those spaces and contribute to the district’s economic vitality.



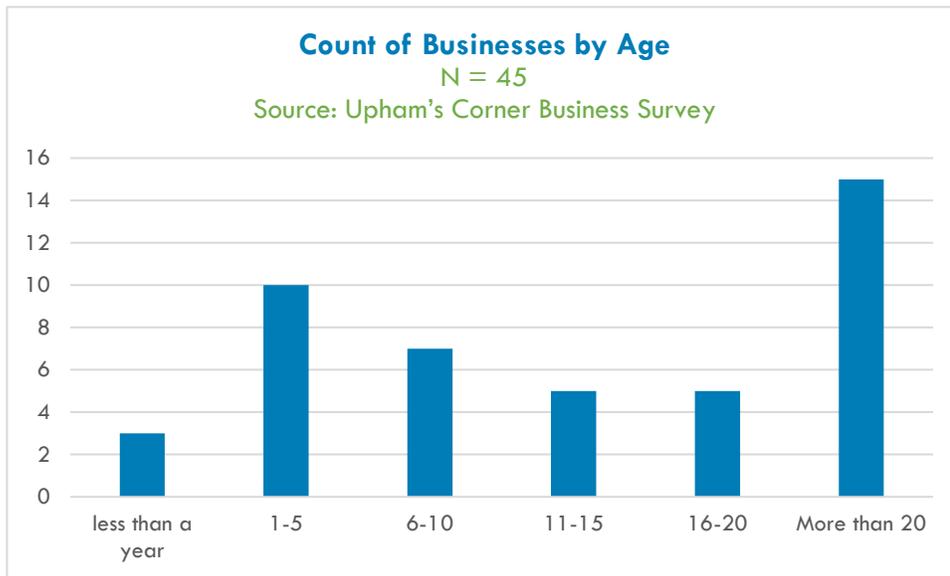
Finding 2: Upham’s Corner has a significant number of long term businesses (more than 20 years old) – but also a growing number of new businesses less than 5 years old.

Of the businesses surveyed, the largest cohort were businesses over 20 years old. Of the 15 businesses surveyed within this cohort, only three had changed ownership at any point, and these older businesses were equally represented across the various use categories. The long-term ownership and diverse business mix across the older business age cohort indicates a solid and long term market base for a variety of neighborhood serving business types.

Along with the long-time neighborhood establishments there is also a strong cohort of young businesses – five years in age or less. Interestingly, the majority of businesses surveyed that identified in this younger age category were restaurants. This may be a reflection of the various efforts to attract complementary uses to the Strand Theatre.

The City of Boston should find ways to support and grow the new businesses that are investing in Upham’s Corner to complement the long time businesses and ensure the vitality of the neighborhood. As mentioned in the accompanying Stakeholder Interview memorandum, the Fairmount Innovation Lab (FIL) could be leveraged to grow new businesses that could occupy existing vacant commercial spaces and new

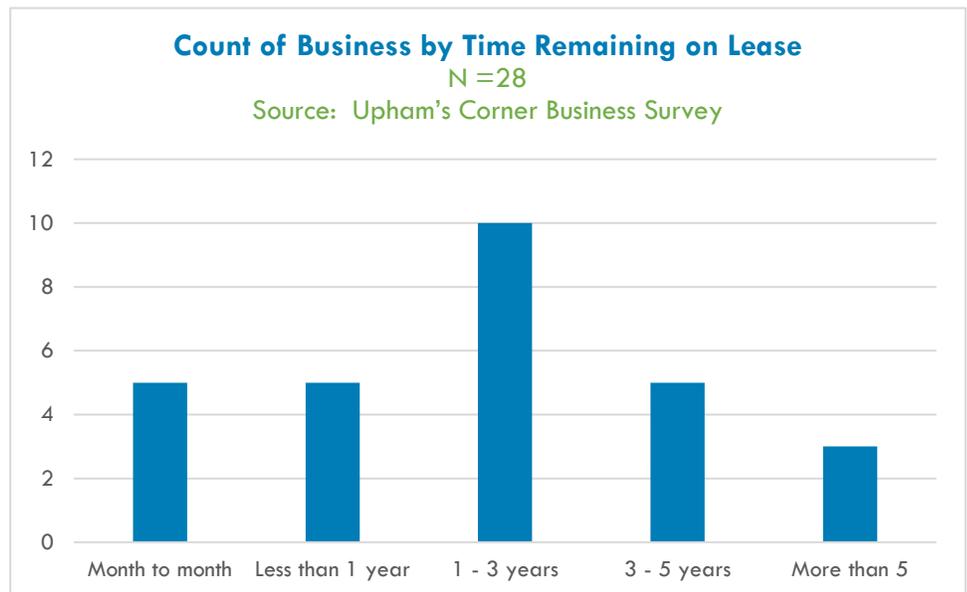
development coming online, pending its affordability. The City should work with the FIL to identify the specific needs of those businesses through continued communication and support services.



Finding 3: Lease Conditions

Of the 45 businesses surveyed only 28 provided information regarding their existing lease. Of those 28 respondents the majority of businesses appear to have stable lease conditions with more than 1 year and in some cases more than 3 years remaining on current lease. Almost all the businesses that responded to this question cited having the option to renew their lease.

Salons and barbershops¹⁴ are more likely to be on month-to-month leases than other business types, but given the small sample size it is difficult to generalize about broad trends in the area.

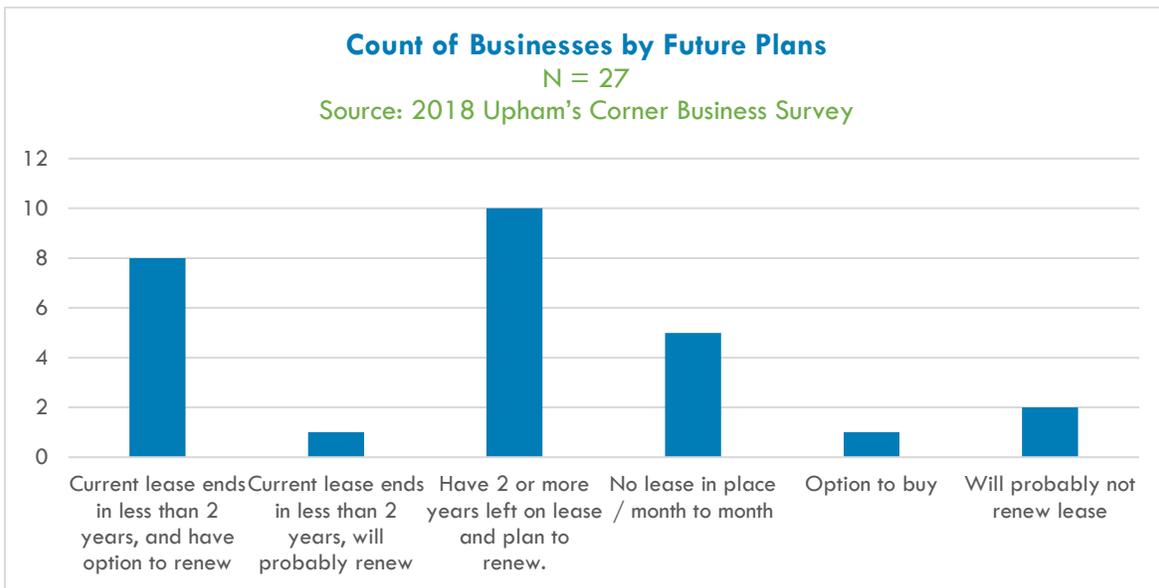


However, the City may want to consider extending additional resources to these types of businesses given their significance within the community.

While the business outlook of surveyed businesses is overall positive, these data should be evaluated with a critical eye given that nearly 37% of businesses surveyed did not respond to this question. It is possible that those businesses who chose not to respond to this survey did so because they did not want to disclose unfavorable lease conditions, or they may not have known the details of their lease in terms of potential to

¹⁴ See appendix

renew. The City should continue to work to ensure fair and equitable commercial tenant protections so as to protect the many long-time and neighborhood-serving businesses in Upham’s Corner.



RECOMMENDATIONS: DEFINING BUSINESS TYPES FOR ANTI-DISPLACEMENT POLICY AND PROGRAM INITIATIVES

As municipalities across the country grapple with issues related to skyrocketing commercial prices and the subsequent loss of small, local, and community-oriented businesses there has been a recent effort to devise strategies to preserve and grow certain sub-sets of local businesses. These retention strategies may require a municipality to set parameters that can be used to evaluate the types of businesses covered by a specific policy or program. These parameters are usually specific to the issue being addressed and may range from industry categorization to the demographic profile of the operator.

Typically, these strategies take one of two forms: Policy or Program. Policy strategies are those that reflect a specific administrative decision to achieve a stated goal and have a long-term, legal, or legislative framework for achieving that goal. In contrast, programmatic strategies are not legally or legislatively defined. They are usually designed to address a specific component of an identified issue, subject to finite funding, and vulnerable to elimination with changing administrations.

Policy Initiatives

Two innovative policy initiatives that have required municipalities to set parameters for business inclusion are the adoption of Formula Retail as a specific use group by the San Francisco planning department¹⁵ and the establishment of Legacy Business legislation in San Francisco¹⁶ and Chicago¹⁷. These initiatives are described more below.

¹⁵ Adopted

¹⁶ Adopted

¹⁷ Pending adoption

Formula Retail

The adoption of a Formula Retail use definition to the San Francisco planning code is designed mitigate impacts from “the increase of Formula Retail (chain) businesses in the City's neighborhood commercial areas (that) if not monitored and regulated, will hamper the City's goal of a diverse retail base with distinct neighborhood retailing personalities comprised of a mix of businesses.”¹⁸ The code defines a Formula Retail businesses as having eleven or more other retail sales establishments in operation, or with local land use or permit entitlements already approved, located anywhere in the world – and two or more of the following features:¹⁹

- A standardized array of merchandise
- A standardized facade
- A standardized decor and color scheme
- Uniform apparel
- Standardized signage
- A trademark or a service mark.²⁰

This use group definition is employed by the San Francisco planning department in considering allowable uses in commercial districts. Regulating this use group can push a commercial market towards serving smaller, locally owned entrepreneurs, which often means that property owners will need to reduce rental costs to meet available demand.²¹

Boston City Councilors Michelle Wu, Kim Janey, and Lydia Edwards are currently pursuing the adoption of a formula retail policy and will be engaging in a community process on the topic in coming months.

Legacy Business

The Legacy Business legislation that has been recently adopted in San Francisco, and is pending adoption in Chicago, is designed to support and ensure the longevity of businesses that are long standing elements of a community or neighborhood. In both cases, the Legacy Business funding programs were created through acts of legislation by either the City Council (Chicago) or County Board of Supervisors (San Francisco). Both programs have the same business eligibility requirements and associated funding mechanisms.

These programs define Legacy Businesses as those that:

- Have been in existence for more than 30 years
- Contributed to their neighborhoods history
- Have made a commitment to maintain their identity, name and craft.

Additionally, the businesses must be nominated by either the Mayor or Board of Supervisors of San Francisco (City Council Chicago), submit an application and be approved by the Small Business Commission. The legislation allows those businesses registered to be eligible for financial programs aimed at reducing operating costs through direct grants and subsidized rents for those that are renters. The source of funding for these grants is tied to increased permitting fees for other businesses in the city. Registered legacy businesses with less than 100 employees are eligible for a \$500 / employee grant. Landlords renting to registered legacy businesses are eligible to a grant of \$4.50 / sq ft, up to 5,000 sq ft, if they enter into a lease with terms longer than 10 years with a legacy business or extend an existing lease beyond 10 years with a registered legacy business.²²

¹⁸ San Francisco Planning Code, Section 303.1

¹⁹ *Ibid*

²⁰ *Ibid*

²¹ Formula Retail Phase II Report, 6

²² <http://legacybusinesssf.com/how-it-works/>, Chicago Ordinance Establishing a Legacy Business Program pg 3 -5

Program Initiatives

As described above, program initiatives do not require an act of legislation to be created. They are often created by a municipal executive and tasked to an existing agency for execution. Two initiatives that could be relevant to the context of Upham's Corner are the Portland Commercial Tenants Assistance Program and the NYC IBZ Tax Credit, described below.

Portland Commercial Tenants Assistance Program

To reduce barriers to entry for underrepresented business operators,²³ preserve the vitality of small businesses, provide business development opportunities that in turn offer needed goods and services to the community, and advance the city's goal to build an equitable economy, the City of Portland has established a Commercial Tenants Assistance program. This program will prioritize access to two recently completed developments, each with multiple retail spaces, for businesses that meet the program's criteria:

- Business ownership diversity, and
- Provision of needed neighborhood services.

Those businesses selected may be eligible for additional incentives including reduced rent, tenant improvement contributions and technical assistance.²⁴

NYC Industrial Business Zone Tax Credit

To encourage the growth and retention of industrial businesses within New York City, the Bloomberg administration enacted a tax credit program that would give businesses a \$1,000 credit per employee moved into an industrial business zone – up to 100 employees. The industrial business zone geographies are defined by the New York City Economic Development Corporation, not the Department of City Planning, and as such they do not have any legal or legislative standing and are subject to administrative change. The program's eligibility is as follows:

- Only businesses that relocated after July 1, 2005 are eligible.
- Businesses may purchase or lease the move-in site, and the eligible premise must be located entirely within an IBZ.
- Businesses must have been conducting substantial business operations continuously during the past 24 months immediately preceding the relocation.
- Businesses and their affiliates cannot own the move-out location.
- Businesses providing utilities and waste management services are not eligible.²⁵

The program defines industrial businesses as those classified within the construction, manufacturing, wholesale trade and transportation sectors and does not specify specific use groups. The city has 13 designated Industrial Business Zone areas to which this tax credit applies. Businesses may claim the tax credit on their General Corporation Tax (GCT) or Unincorporated Business Tax (UBT) during the tax year of the move. To enter the program, businesses must apply through the Department of Small Business Services.

²³ Underrepresented defined as race, gender, and other demographics typically as underrepresented in the business community

²⁴ <https://prosperportland.us/portfolio-items/affordable-commercial-tenanting/>

²⁵ <https://www1.nyc.gov/nycbusiness/description/industrial-business-zone-relocation-credit>

Summary of Eligibility Criteria by Program

The table below summarizes the criteria used to evaluate properties across the policy and program initiatives described above. Number of employees, industry type, geography, renter status, and existing operations are the five criteria in common across two or more policies or programs.

Business Policy and Program Eligibility Criteria

	<u>SF / Chicago Legacy Business Legislation</u>	<u>SF Formula Business Code</u>	<u>Portland Affordable Commercial Tenanting Program</u>	<u>NYC IBZ Tax Credit</u>
Number of Employees	X			X
Square Footage	X			
Industry Type		X		X
Community Contributing	X			
Commitment to Continue Operations	X			
Specific Business Use		X		
Age	X			
Standardized Appearance		X		
Number of locations		X		
Geography			X	X
Operator profile			X	
Renter	X		X	
Owner	X			
Nomination Process	X			
Existing Operations	X	X		X

As the City of Boston begins to further define the characteristics of the Arts & Innovation District in Upham’s Corner, additional research regarding municipal definitions of creative or arts type businesses should be completed to add to the list above.

PROMOTING WORKFORCE DEVELOPMENT

INTRODUCTION AND CONTEXT

Boston's creative economy has been growing steadily and is becoming more widely recognized as an opportunity area for employment in the city. Building off of recent job attraction and retention analysis done in the Fairmount Indigo Corridor, this memorandum focuses on the specific conditions in Upham's Corner that can be leveraged for workforce training and employment opportunities in creative fields. Upham's Corner has an exceptional asset in The Strand Theatre and a growing cohort of creative entrepreneurs incubating at the Fairmount Innovation Lab, making it uniquely positioned to capitalize on creative sector growth.

The transformation of the Strand Theatre into a more community focused arts hub linked to a new Upham's Corner Branch Library could be leveraged for training or development programs in industries that intersect with the performing arts. Sound technology and video production are both sectors that have been adding jobs in recent years²⁶ and are directly related to activities that occur within a performing arts space. Set design and construction, which require carpentry skills that overlap with the construction sector, is another area of specialization that could develop job skills relevant to stable and desirable career paths.

Peripheral to these performing-arts-specific activities are support services such as advertising, public relations, and graphic design. As illustrated through the community planning process and stakeholder interviews, a need for these services exists to support creative entrepreneurship in the neighborhood as well as activities at the Strand.

Finally, through the various planning processes that have occurred in Upham's Corner, the community has emphasized the need for expanded food and entertainment services that can complement activities at the Strand and help create a strong arts and entertainment hub. Upham's Corner is located in close proximity to a number of established and successful workforce development programs targeting the food services sector, and these could be leveraged towards this goal.²⁷

Previous Planning Efforts in Upham's Corner

A series of planning efforts between 2014 and 2017 have established a consistent vision for Upham's Corner as a center of arts, entertainment and entrepreneurship. This vision for Upham's Corner emphasizes building pathways to prosperity for existing residents while mitigating the forces driving displacement. Of particular relevance to understanding the opportunities and constraints around workforce development in Upham's Corner are the following four plans:

- Fairmount Indigo Planning Initiative Corridor Plan (2014)
Boston Redevelopment Authority
- Fairmount Indigo Planning Initiative Upham's Corner Station Area Plan (2014)
Boston Redevelopment Authority
- Fairmount Indigo Corridor Business and Job Attraction and Retention Strategy (2016)
Initiative for a Competitive Inner City, American City Coalition, LISC Boston

²⁶ BPDA Creative Economy Update 2017

²⁷ Fairmount Indigo Planning Initiative Upham's Corner Station Area Plan, 2014, p. 34.

- Imagine Boston 2030 (2017)
Boston Mayor's Office, Many other Contributors

These plans seek to address the particular challenges facing residents of Upham's Corner and to build on the underlying strengths of the neighborhood. Unemployment in Upham's Corner is significantly higher than the City of Boston overall (13% vs 8%)²⁸ and all four plans include strategies and recommendations designed to support the residents of Upham's Corner access jobs and grow local business. When viewed as whole, three core strategies for strengthening workforce development in Upham's Corner emerge:

- 1) **Invest** in local programs, coordination efforts, and physical improvements to promote neighborhood commercial vitality;
- 2) **Partner** community organizations with businesses and institutions to coordinate workforce training programs, employment opportunities, and access to higher education resources; and
- 3) **Connect** residents to jobs in anchor sectors through education, training and transit access.

It is understood in these plans that the established and growing industries most likely to be accessed through workforce programming (healthcare, technology and advanced manufacturing) are located outside of Upham's Corner in areas like Readville, Widett Circle, and around South Station. In fact, reviewing US Census LEHD data indicates that those are the areas employing the highest numbers of Upham's Corner residents in addition to the Longwood Medical Center. This finding is illustrated in the heat map in Figure 1.

Transportation has been cited as a barrier to employment in previous studies and ongoing conversations with area stakeholders²⁹. Although served by the commuter rail and several bus lines with connections to the Red Line, Upham's Corner feels transportation isolated. The percent of Upham's Corner residents commuting by car is 8% higher than the percent of Boston residents commuting to work by car as a whole.³⁰

As a tightly knit residential neighborhood with an arts and culture anchor at The Strand, Upham's Corner is uniquely positioned to focus on youth development in the arts and related fields, provide space and tools to launch creative businesses, and attract entrepreneurs to support the existing arts and culture uses in the area. Currently, only about 7% of Upham's Corner residents both live and work in the neighborhood, but an expanded Arts & Innovation District anchored by a co-located theater and library could generate additional employment opportunities for local residents.

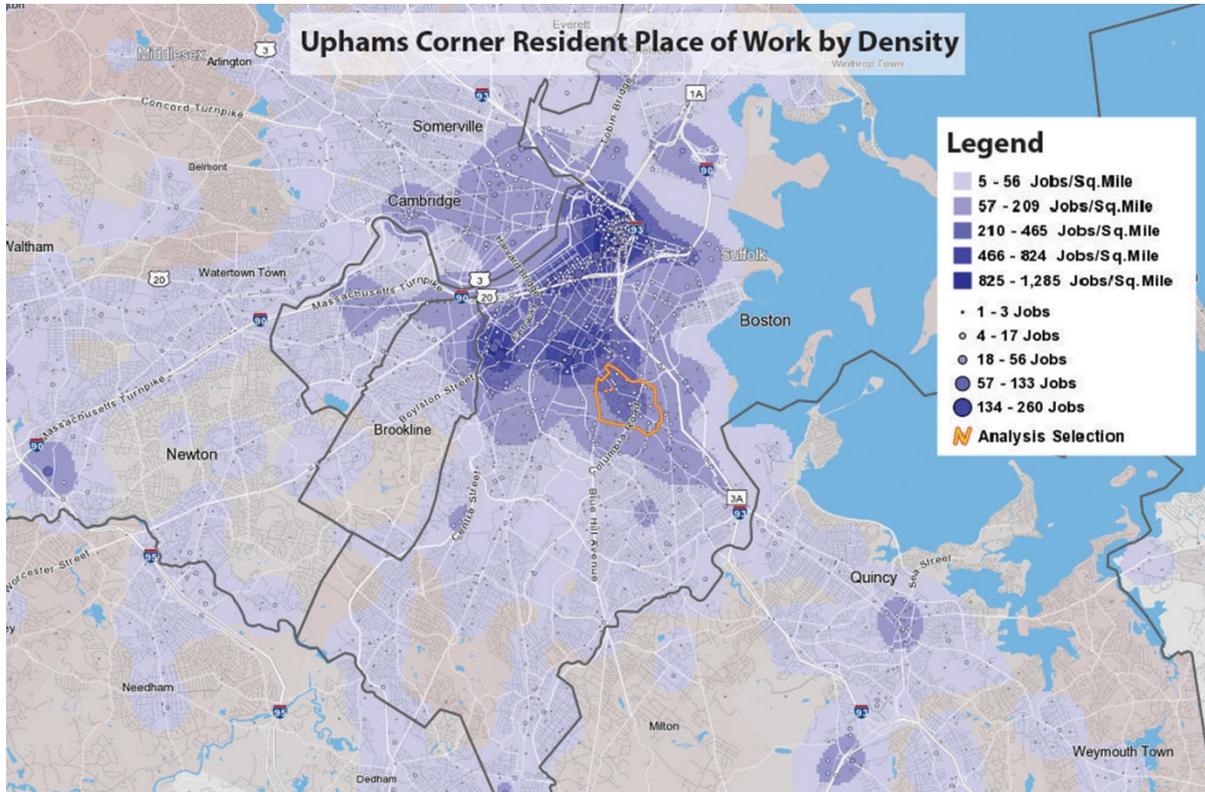
²⁸ US Census ACS 2016 5 Year

²⁹ MAPC Stakeholder Interview Memo 1/10/2018

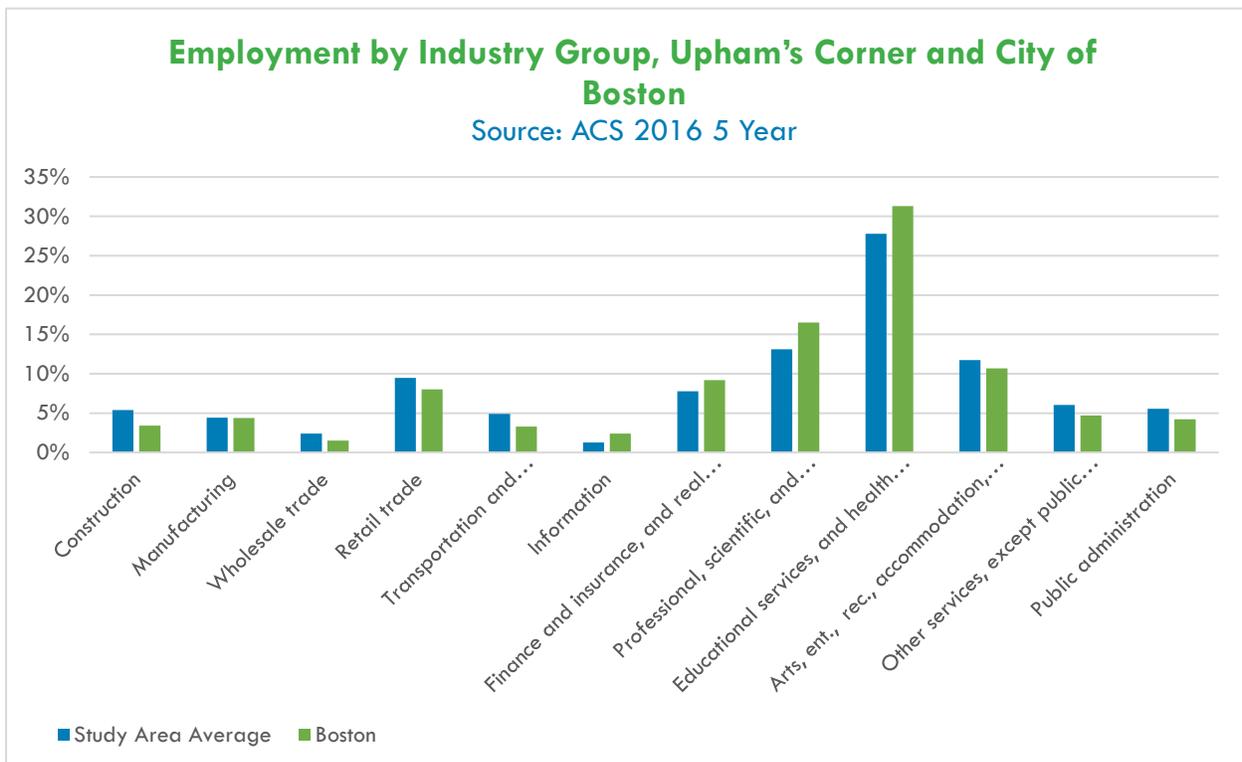
³⁰ *Ibid*

In terms of industry composition, the makeup of Upham's Corner broadly reflects that of the City of Boston, with a few exceptions. A slightly higher share of residents in the neighborhood than the city as a whole work in the industrial sectors of construction, wholesale trade, and transportation and in service sectors like retail trade and the arts, entertainment, accommodation, and food service sector.

Figure 1 Heat map showing concentrations of employment destinations for residents of Upham's Corner - US Census LEHD Data



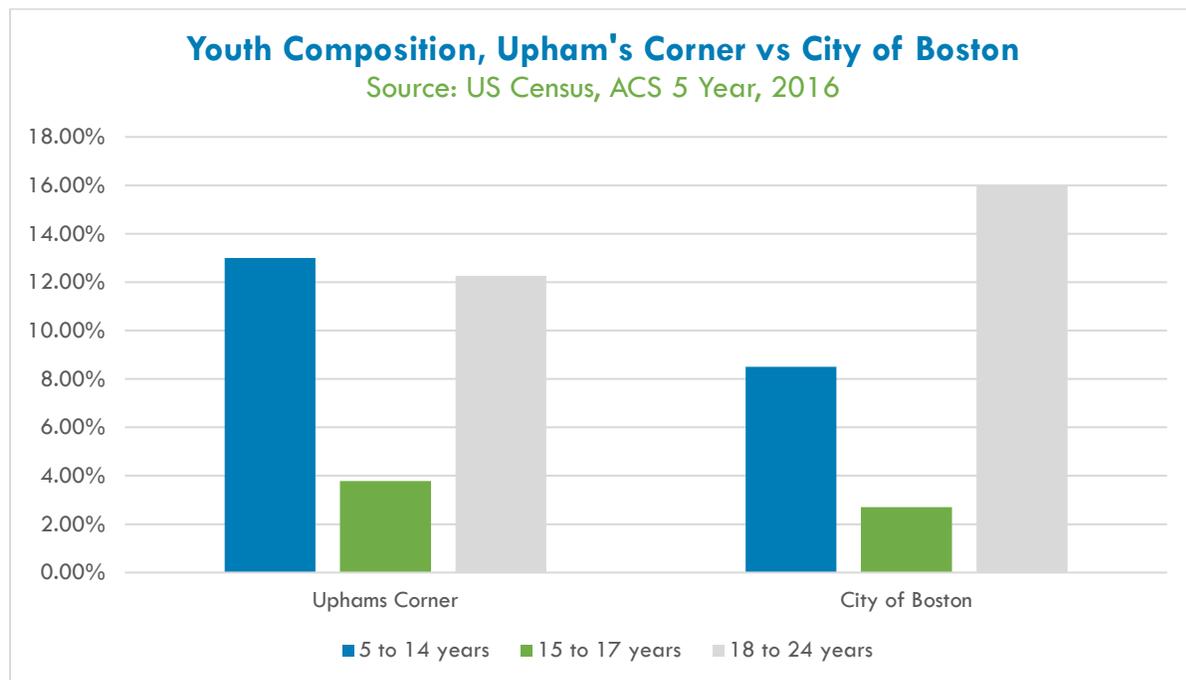
Accessed 3/21/2018



LEVERAGING THE STRAND THEATRE FOR CREATIVE YOUTH DEVELOPMENT

While Boston has grown some sectors of its creative economy, it remains unclear whether graduates of a creative-sector-specific workforce development program would have access to immediate employment upon graduation. The BPDA cites that only 5 of the top 20 creative sector occupations with the most expected job openings require less than a bachelor's degree.³¹ Only 19% of Upham's Corner residents currently have a bachelor's degree or higher (compared with 45% in Boston overall) and employers may not see graduates of a workforce development program as being competitive against candidates with higher levels of specialized educational attainment. The City of Boston's forthcoming Creative Economy Workforce Career Pathways report will shed more light on that topic and should be used to inform any creative workforce programming in the future.

In contrast, youth development programs in the performing arts can more easily support the day-to-day operations of theater management without the additional work of developing a job pipeline for participants. Members of the WAG and the broader community have expressed strong preference for youth programming to accompany Strand redevelopment. This combination of factors points to an approach to workforce programming at the Strand that exposes young people to the creative or performing arts and builds a foundation of practical experience from which to pursue additional education, training, and career opportunities. Young people under 14 years old make up 13% of the population in Upham's Corner, with young people between the ages of 14 and 24 accounting for another 16%.³² A youth program focused on the performing arts would not only align with the Strand's core performing arts programming, but also serve a significant portion of the local population.



Youth who participate in a performing arts program can expect to build confidence, develop self-discipline, and experience a collaborative problem-solving environment. It is important to note that

³¹ BPDA, *Boston's Creative Economy - An Update*, p. 45.

³² US Census ACS 5 Year 2016.

youth development through the arts can support a wide range of career and educational opportunities. Reggie Williams at the Transformative Culture Project stated that “The main thing for us is that not all of our students are interested in media career. Often, people come in and think they want to produce music videos and then they realize that’s not what they want. We are more interested in career readiness. Not just focused on the technical aspects of production and media. Developing transferrable skills to help give students opportunities to succeed in our society.” The local successes of youth development programs grounded in the arts are many. Artists for Humanity, the Transformative Culture Project, Zumix, and many others have proven the wide-ranging benefits for youth that participate in these programs. All three of these youth arts programs serve at-risk youth from Boston neighborhoods with high rates of poverty and violence, and all three see 100% of their high school seniors graduating on time and 90-100% of those seniors accepted into post-secondary educational programs including vocational-technical training programs. The Boch Center also runs youth development programming including in-school residencies and the City Spotlights Summer Leadership Program. These programs share a number of commonalities. First, they are motivated by a strong mission to serve youth from families and neighborhoods most disadvantaged in terms of access and exposure to the arts. They also have all built programs that are explicit about linking youth training in the arts – including painting, music, dance, filmmaking, photography, and theater – to paid employment and exposure to a range of related career paths from graphic design to media arts to music production and management as well as core academic skills including literacy and STEM skills.

Following these models, youth development programs that would complement the Strand Theatre as a facility should balance two components. The first would be a core set of programs that give youth arts training and applied experience to build technical and soft skills that have lifelong benefits. The second would include wraparound programs that extend the impact of the core programming by supporting successful transitions from secondary education to higher education, vocational programs or career paths. The following section illustrates some types of youth development programs that could leverage the performing arts for personal development and future career opportunities.

Experiential Programs: Performing Arts

Arts education in itself is correlated with positive youth development outcomes. Across all disciplines, youth art education is associated with a 55% increase in post-secondary school attendance among adults. In addition, former students of the arts are 29% more likely to have earned a four-year degree by the age of 24-32.³³ Education in the performing arts including music, dance, and theater, requires access to spaces and facilities with particular features including acoustic quality, stage, audience seating, lighting and electricity, backstage and storage areas, and appropriate flooring (for dance in particular). These features are cost-prohibitive as standard elements of K-12 education facilities. For this reason, existing performing arts facilities are an important asset that can support youth performing-arts education. In addition, entry into career paths in the performing arts or other creative fields is determined by a particular set of requirements that are distinct from other fields and requires access to appropriate facilities as well. Access to space for individual practice, group rehearsal, and auditions are all important for successful entry into performing arts fields.

As a non-profit performing arts venue in Boston, the Strand is among the city’s performing arts facilities that provide access to technical amenities at a lower price point than other venue

³³ Elpus, Kenneth, “Arts Education and Positive Youth Development: Cognitive, Behavioral, and Social Outcomes of Adolescents who Study the Arts,” NEA Research: ArtWorks, 2013, p. 4.

categories.³⁴ This group of facilities is also notable in that it is essentially operating at capacity – 80% of these facilities report being fully booked or nearly fully booked.³⁵ Opportunities to learn, practice and perform music, theater, and dance are rare for youth, and the Strand could become a unique resource for local youth in this regard. Both Matt McArthur, Executive Director of the Record Co., and Mark Popeney, Department Chair of Performing Arts at Bunker Hill Community College cited soundproof rehearsal space as particularly scarce. Mentorship support and space for practicing, preparing for auditions, rehearsing, and performing are invaluable assets for youth interested in pursuing careers in the performing arts. The Strand is uniquely positioned to make these assets available to local youth.

Experiential Programs: Technical Training

Through experience with the technical side of the performing arts, youth can build skills in fields relevant to creative economy career paths beyond the performing arts sector. Technical production training in sound engineering, lighting design, costume design and fabrication, and set design and construction introduces youth to skills and knowledge transferable to technical creative careers in the applied arts of graphic design, architecture, fashion and interior design, music production, film, and photography, among others.

Event production has been cited as an employment driver for workers with skills in sound technology, video production and lighting. The City of Boston plays host to a constant stream of conventions, conferences, concerts and performances. The various hotels, convention centers, and public spaces that host these events may not have in house technical staff,³⁶ thus mandating a need for third-party operators to provide services. With a state-of-the-art convention center, international airport, and world-class universities and businesses, it is likely that Boston will only continue to grow as a hub for events which will continue to drive demand for skilled event production workers. To capitalize on this employment opportunity, several local organizations and educational institutions have begun to build programs that can link local talent to the industry. Bunker Hill Community College has recently revamped its music major within the Performing Arts Department to better reflect the growing need for technical skills within the music industry. Event production was cited as the field most readily available for graduates of the program not moving on to four-year degree programs. Bunker Hill Community College is also considering a new certificate program in these fields to create opportunities for people seeking technical training in the field without pursuing a four-year degree. Roxbury Community College also offers an Associate of Arts and a certificate program in the field of Broadcast Media Technology.

Beyond higher education, other organizations in Boston have also reacted to the growing field of event production and demand for skilled labor. Brighter Boston, a local non-profit, has developed a training and internship program in lighting and sound technology that places high school students in event production crews where they get hands-on experience in set up and production. These opportunities are a critical component of building professional experience and networks within the industry.

Wrap Around Programs: Performing Arts for Public Safety

A variety of programs for youth apply the performing arts to the challenges of police-community relationships and court-involved youth. These programs can help support local youth to escape the criminal justice system and enter the workforce. Two Massachusetts performing arts organizations

³⁴ *Performing Arts Facilities Assessment, 2017, pp. 18, 20.*

³⁵ *Ibid, p. 19.*

³⁶ *Interview with Rob Lehman, Adjunct Professor – Sound Technology, Bunker Hill Community College*

target court-involved youth: Shakespeare in the Courts and the Actors Shakespeare Project. The Actors Shakespeare Project previously partnered with the McCormack Center for the Arts to bring its programs to residents of Upham’s Corner. Operation Conversation: Cops & Kids is a performing arts program that helps bridge the divide between the police and community youth developed by the All Stars Project in New York City. It has expanded to Newark, NJ, and Dallas, TX, as well.

Wrap Around Programs: Higher Education Access

Wrap around programs that support youth in audition preparation and portfolio development would be an important complement to youth performing arts programs intended to support career and college readiness. As stated, Upham’s Corner residents have lower rates of higher education than Boston residents overall and there is a significant concentration of college aged or soon-to-be college aged young people. To bridge this educational attainment gap youth support programs for college readiness could be provided through partnerships with the Boston Public Schools that would allow youth to receive high school credits for their time at the Strand, mentorship in audition preparation, college research and application preparation, and portfolio development. These programmatic elements are all critical to supporting the transition from secondary to higher education programs and careers. The relocation and expansion of the Upham’s Corner library should also be leveraged as an asset for assisting local youth achieve higher educational attainment.

AREA WORKFORCE DEVELOPMENT

As programming and activity increases at the Strand, the opportunities for additional businesses and support services in Upham’s Corner will as well. Based on interview findings and recommendations from previous plans, three sectors have emerged as having the greatest potential for job training and creation that could serve area youth and adults: facilities maintenance and management; food service training and entrepreneurship; and media arts. These programs would not be run by as part of the Strand operations but could be developed through partnerships with external organizations and investments to subsidize program development. The following section identifies the core areas of opportunity as well as potential partners for establishing or extending workforce development programs.

Facilities maintenance and management

The upkeep and maintenance of the Strand Theatre building is an ongoing challenge that could provide an opportunity for developing carpentry and construction skills among youth and adults at the theater. The Strand is an historic theater built in 1918 as the city’s first major suburban movie palace. Its brick and stone façade and interior of marble, granite, and ornamental plasterwork, as well as the stage and seating areas need ongoing maintenance and repair work. Integrating this maintenance into a skill-building program for local youth and adults could help address the ongoing maintenance challenges associated with historic facilities while providing training and experience in construction fields. Operating a program like this would require an appropriate partner experienced in job training and construction and with access to the tools and workshops needed for successful implementation. Potential program partners might include:

- a. **North Bennett Street School Preservation Carpentry Program.** This program provides education and training in construction methods relevant to historic restoration, preservation, and recreation of historical details as a full-time course offering. In addition, the school offers continuing education classes in a range of carpentry skills including framing, interior trim, and drywall.

- b. **Youth Build Boston and Roxbury Community College Boston Trades Assessment Center.** Roxbury Community College currently offers a three-week introduction to the building trades program for 18-26 year olds through its Boston Trades Assessment Center. That program serves as a prerequisite for a nine-week training program led by Youth Build Boston. Upon completion of the nine-week training, participants earn Pre-Apprentice certification that is compliant with MA Department of Workforce and Labor Standards.
- c. **New England Carpenters Training Fund.** This program offers classes at the Boston New England Carpenter's Training Center and provides information and resources for carpentry and construction apprenticeships.

Food service training and entrepreneurship

The Upham's Corner community and WAG have expressed a desire for the Strand Theatre to anchor a more active district with restaurants and food service options that complement the Strand's entertainment uses. Several existing organizations in the area are active in food focused workforce and entrepreneurship programs and could expand their offerings in Upham's Corner. The recent Public Kitchen pop up proved the positive impact of a community focused food establishment in Upham's Corner and could serve as a model for any future food workforce or entrepreneurship development venture. Possible program partners might include:

- a. **Kroc Corps Community Center Culinary Arts Training Program.** This is a 10-week course serving the Dorchester/Roxbury community for students in need. It teaches knife skills, food terminology, kitchen safety standards, recipes, and effective work performance. Students graduate with college credits and a Jr. Apprenticeship certification from the Commonwealth of Massachusetts. The services are provided free of charge.³⁷
- b. **New England Center for Arts and Technology Culinary Jobs Training Program.** This program provides unemployed and underemployed individuals with the technical, professional and life skills necessary to secure career-ladder jobs in the culinary industry through an intensive 16-week Culinary Arts Job Training Program. The program was launched in October 2013 and serves roughly 150 students annually, across six cohorts. NECAT's program is offered at no tuition cost to the students.³⁸
- c. **The New Bornstein and Pearl Food Facility.** This program is a product of DBEDC's partnership with nonprofit Commonwealth Kitchen to repurpose a 36,000 square foot former factory into a state-of-the-art food production facility that Commonwealth Kitchen would manage as a small business incubator, plus kitchen spaces for lease to other small food businesses.

Media arts

Adjacent programs that provide training in graphic design, videography, and other media arts would complement both the marketing, storytelling, and PR needs of the Strand and the needs of adjacent food service programs and creative entrepreneurs. Both The Record Co. and Fairmount Innovation Lab noted that the artists and entrepreneurs in those spaces needed assistance in marketing,

³⁷ <https://bostonkroc.salvationarmy.org/BostonKroc/Culinary>

³⁸ <https://ne-cat.org/culinary-arts-job-training/>

branding and related activities. Finding partnership programs that could provide services to the growing creative cohort in the area while providing learning and practical experiences would be mutually beneficial. Possible program partners might include:

- a. **The Transformative Culture Project's Beyond Creative program.** This program provides youth with a two-year training process in digital media production. TCP then links the participants with real world clients looking for media production services.
- b. **Boston Neighborhood Network (BNN).** BNN is Boston's public access TV operator. Along with operating a network channel BNN offers media education and training programs for residents.

ENTREPRENEURSHIP TRENDS IN UPHAM'S CORNER

Through a series of interviews with operators of entrepreneur support programs³⁹ and co-working spaces it became clear that there is unmet demand for more flexible co-working spaces for entrepreneurs in Upham's Corner. However, more research is needed to identify the specific types of spaces, facilities, or equipment that growing businesses might need once they leave a co-working or incubator space. The City of Boston's upcoming survey in Upham's Corner is an opportunity to engage directly with the entrepreneurs using existing co-working space to help identify their specific spatial requirements for business growth. When new commercial development is planned for Upham's Corner and as older spaces are renovated, this information will allow the City to clearly articulate the needs of emerging businesses to the development community so that new construction can accommodate those businesses, which are a priority for the community to grow and retain in the area.

The relationship between growing creative businesses and existing neighborhood-serving businesses in Upham's Corner is another area that requires further exploration, potentially through the business survey. While the arts and creative businesses and users are thriving in small flexible spaces like the Record Company and Fairmount Innovation Lab, they are not necessarily connected to the street level experience in Upham's Corner. "There is definitely a divide between the FIL businesses and the traditional retail establishments in Upham's Corner," said the late Liora Beer, founding Executive Director of the Fairmount Innovation Lab. Integrating the Fairmount Innovation Lab's activities and the business community's expertise and services with the traditional neighborhood businesses could help strengthen the neighborhood's emerging identity as an Arts & Innovation District.

Financial acumen and business stability was one area that surfaced as common need among entrepreneurs in the area. Conversations revealed that the local non-profit and CDC community has a robust network of lenders targeting small and emerging businesses. However it was stated that even with this network, some of the small and startup businesses still have trouble accessing financing because they are unable to prove a required level of financial stability. The City of Boston offers several small business loan options, with one specifically designed as a micro loan for businesses who may be too small to access traditional capital. Again, using the upcoming Upham's Corner survey of businesses in the Fairmount Innovation Lab and in street-level storefronts to better understand access to and use of different financing programs will be critical in developing programs that can better support job growth in Upham's Corner.

³⁹ DBEDC, *Transformative Culture Project, Fairmount Innovation Lab – Did not connect with Roxbury Innovation Center.*

MANAGING NEIGHBORHOOD CHANGE: MITIGATING RESIDENTIAL DISPLACEMENT

OVERVIEW

Upham’s Corner Implementation, along with the proposed strategies for improvements to the Fairmount-Franklin commuter line and the Savin Hill Red Line stop, will likely increase neighborhood appeal to households and businesses beyond Upham’s Corner. New investment in housing, businesses, or infrastructure typically brings broader changes to a community. Because Upham’s Corner is currently a lower-income community, it is likely that new investment and neighborhood improvements for residents and businesses around the Upham’s Corner neighborhood will lead to or accelerate gentrification, a particular type of neighborhood change defined by an increase in housing costs and an influx of new, higher-income residents. Gentrification usually coincides with one of two changes in housing occupancy:

Replacement: Replacement occurs when the number and composition of out-migrants does not change, but the people who move in have different demographic characteristics from those who move out. With this pattern, current residents do not face pressure to leave, but those who choose to leave are replaced by residents with a different demographic profile.

Displacement: Displacement occurs when the rate of outmigration is higher than it otherwise would be because lower-income residents move due to increases in housing costs and a lack of affordable options. In-migrants can afford a higher cost of living and tend to have a different demographic profile from those who move out.⁴⁰

The differences between these kinds of housing occupancy changes can be subtle, but meaningful. Importantly, either of them—not just displacement—result in profound changes in the demographic composition and social cohesion of a community. It is likely that one or both of these changes in housing occupancy and the associated changes in demographic composition will happen to some degree in Upham’s Corners as an indirect result of new investment unless the City of Boston, in partnership with state funding agencies and local financial institutions, and other leaders take action to intervene.

The challenge presented by the opportunities that come with investment is to manage the associated market inflation, or increases in real estate values, that can otherwise result in relocation of low- and moderate-income residents, either by replacement or displacement, to less accessible or more distant areas where housing is more affordable.

The City of Boston can plan ahead to leverage investment in Upham’s Corner for residents of all income levels, and mitigate the risks associated with it. Ideally, this would result in a more equitable

⁴⁰ MAPC, “The Dimensions of Displacement: Baseline Data for Managing Neighborhood Change in Somerville’s Green Line Corridor.” February 2014.

distribution of the benefits of new investment among current residents and new ones. In Upham's Corner, this would mean the neighborhood maintains its diversity and vibrancy, while offering new opportunities to all those who call it home.

To support the City in this work, the Metropolitan Area Planning Council (MAPC) prepared this brief report to assess the state of households and housing and projected displacement risk in Upham's Corner, as well as to provide recommendations and best practices to manage neighborhood change. Through a demographic and housing analysis of Upham's Corner we found that resident composition has not changed much since 2010, and the neighborhood continues to be racially and ethnically diverse. Many households are renters, who are usually at a higher risk of displacement than homeowners. Deed-restricted affordable units constitute a high percentage of the neighborhood's rental housing stock. Meanwhile, sales prices for most housing types have surpassed their 2005 peak prices, and condo conversions have doubled every year for the past three years. The displacement risk analysis conducted in collaboration with the City of Boston's Department of Neighborhood Development (DND) found that one-third of households in Upham's Corner are currently at an elevated risk of displacement.

A literature review of the impact of new residential development on surrounding housing prices, as well as the connection between art and Arts & Innovation Districts and gentrification and displacement, revealed that outcomes vary. Increasing housing supply can lower displacement probabilities in low-income neighborhoods, while producing subsidized units has more than double the beneficial impact. Different art activities are associated with different types and scales of neighborhood change. Generally speaking, artists may benefit in the short term from economic growth. Because many artists earn relatively low incomes, however, they are vulnerable to displacement in the medium- and long-term.

Based on a demographic and housing analysis, literature review, and conversations with City staff, MAPC makes the following recommendations (which are discussed at length in the final section of this report):

1. Expand Boston's citywide Condominium Conversion Ordinance to apply to duplexes and triple-deckers.
2. Increase the capacity of Boston's Office of Housing Stability (OHS).
3. Redevelop and continue advocating for an anti-displacement legislative agenda.
4. Improve messaging around housing issues and City programs and resources.
5. Create an Upham's Corner Artist Housing Task Force.
6. Increase the supply of deed-restricted affordable artist housing.
7. Give affordable housing preference to residents experiencing housing cost burden.
8. Monitor neighborhood change and reevaluate strategies to manage it as needed.

UPHAM'S CORNER CONTEXT

This section provides an overview of recent planning work in Upham's Corner and current demographic and housing conditions.

Review of Plans

MAPC reviewed four City of Boston plans that specifically address the Upham's Corner area or the greater Dorchester neighborhood:

I. Upham’s Corner Station Area Plan (2014)

The plan is part of a greater effort by the Boston Planning & Development Agency (BPDA) and the City of Boston to identify short- and long-term strategies to increase capital investment, public realm improvements, and job access along the Fairmount Indigo commuter line. The plan establishes a framework for future improvements and investment, with the main goals of minimizing residential and business displacement, protecting existing community assets, strengthening businesses, reinforcing walkability, providing housing opportunities, and reinforcing connections to the rail station.

The Upham’s Corner Station Area Plan also includes a community vision for future development that has informed the City’s planning efforts with the neighborhood: *“Upham’s corner is a revitalized commercial, cultural and community center that is a celebration of diversity and an arts and cultural anchor of the Fairmount Indigo Corridor.”*

The plan features housing-specific goals , including new residential uses along Main Street, increasing housing choices with more multifamily housing near the rail station, infilling vacant lots with new housing, and minimizing displacement of existing residents. Strategies to achieve these goals center around modified zoning to allow mixed-use development of up to 6 stories, transit-oriented development around the rail station up to 10 stories, modification of the Neighborhood Shopping Subdistrict, and decreased parking requirements. Strategies to preserve affordability and mitigate displacement include the creation and preservation of affordable housing, including establishing a density bonus for developers of affordable housing, creating an acquisition opportunity program, and an extremely low-income set-aside policy of 10% for City-funded projects.

II. Housing a Changing City (2014)

The City’s housing plan aims to address issues of affordability, increase the housing supply, and preserve existing affordable units. Four main strategies are identified for maintaining strong neighborhoods: (1) mitigating gentrification; (2) foreclosure prevention and intervention; (3) diversity of housing choices; and (4) strengthening the connection between homes and health. The neighborhood of Dorchester is highlighted as a gentrifying district, especially for low-income households, as well as a coastal neighborhood vulnerable to sea-level rise and storm surge.

III. Imagine Boston 2030 (2017)

This is the citywide plan for Boston’s future in accordance with 5 key actions: (1) enhance neighborhoods; (2) encourage a mixed-use core; (3) expand neighborhoods; (4) create a waterfront for future generations; and (5) generate networks of opportunity.

Upham’s Corner is specifically mentioned as an Enhanced Neighborhood Pilot that is community-led and city-catalyzed. The ultimate goal of the Upham’s Corner Pilot is for the City to jump-start neighborhood enhancement through targeted investment while ensuring existing residents benefit through the creation of affordable housing and economic development opportunities, as well as general displacement prevention.

The Pilot includes investments and policies in arts and culture, transportation, open space, housing, and economic development to strengthen the area’s historic fabric, enable economic development and local innovation, support arts and culture, preserve affordability, and prevent displacement. Housing-specific goals include ensuring affordability for a full range of incomes (1/3 affordable, 1/3 middle income, 1/3 market rate), strategic land acquisition and development to create affordable housing, and implementation of proactive anti-displacement measures to ensure stability.

IV. Go Boston 2030 (2017)

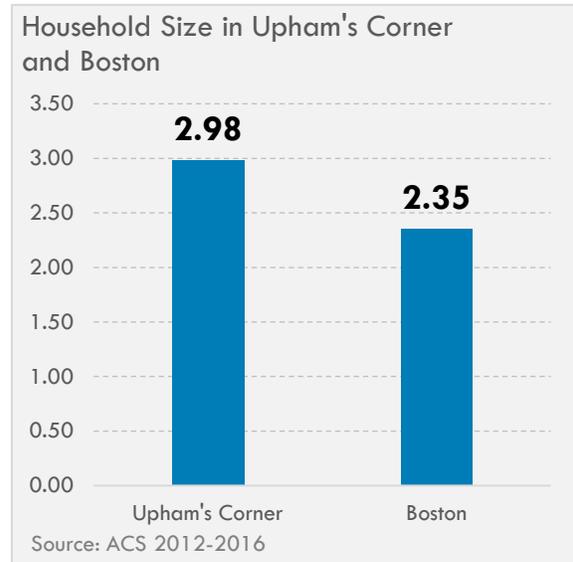
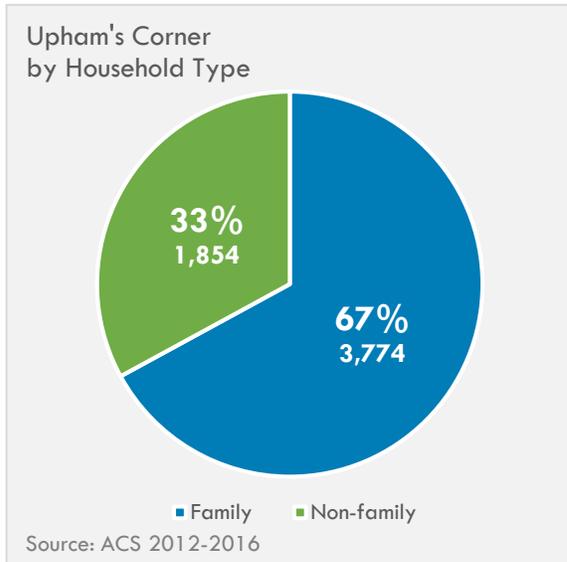
This city-wide strategic plan focuses on increasing connectivity. The Plan provides a list of prioritized transportation projects that include some in the Upham's Corner area, such as the Fairmount Indigo Line Service Improvements and Urban Rail, the Fairmount Greenway Neighborways (a nine-mile walking and biking route parallel to the Fairmount Indigo Line), the Columbia Road Greenway (a linear park along Columbia Road), and the LMA to JFK Rapid Bus via Dudley and Upham's.

Current Demographic and Housing Conditions

A first step towards mitigating any risk of displacement in Upham's Corner is to gain a better understanding of the existing neighborhood in order to manage future changes effectively. This section provides a baseline analysis to establish the demographic and residential context of the neighborhood based on U.S. Census and American Community Survey data.⁴¹ Understanding how households have changed through time, analyzing housing market dynamics, and assessing the availability of deed-restricted housing can highlight neighborhood trends. For more information on this subject, please see Appendix F.

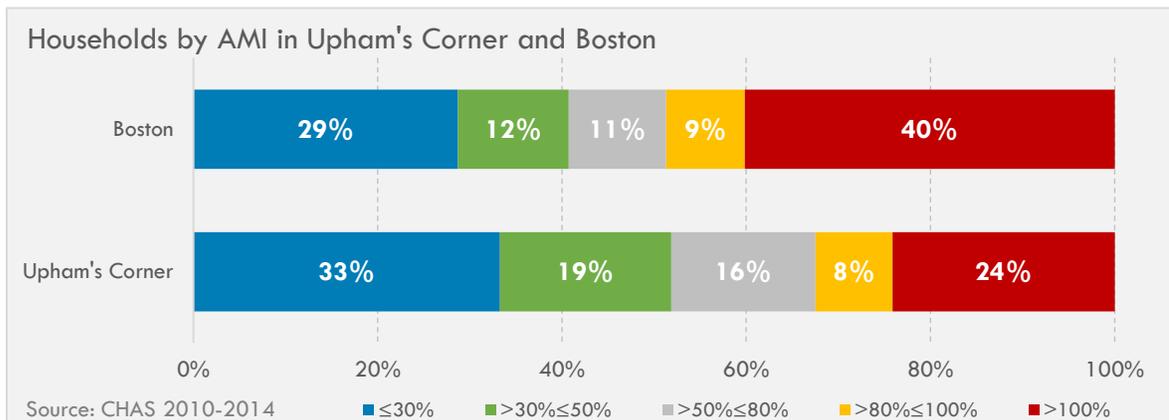
Key Findings

- **Despite a 10% growth in population, Upham's Corner currently has a similar demographic profile to that in 2010.** The majority of households are still families, and tend to have more members than in the overall City of Boston.



⁴¹ This analysis relies on the 2012-2016 American Community Survey (ACS) 5-year estimates and the 2010 US Census. Outside of decennial Census data, the 5-year estimates provide the most reliable and precise data, especially for very small populations at the tract level. Due to geographic changes in the Census tract and block groups between 2000 and 2010, it was not feasible to include earlier data. The neighborhood of Upham's Corner is concentrated in 13 different block groups within Census tracts 904, 912, 913, and 915.

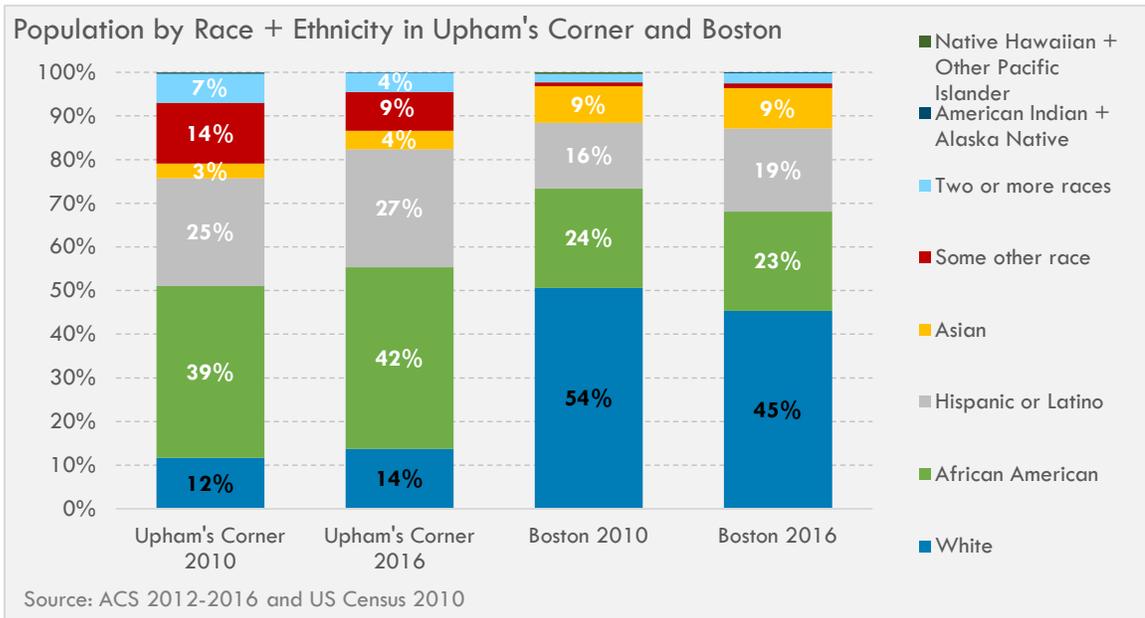
- Upham’s Corner residents tend to have lower incomes than those in the overall City of Boston, and household income has not increased significantly since 2010.** A stable median household income in Upham’s suggests that households moving into the neighborhood have similar economic profiles to current residents. The neighborhood continues to have a high population of lower-income households, who are typically at greater risk of displacement. Approximately 68% (3,724) of households in Upham’s Corner are low-income, compared to 51% in Boston.⁴² About 33% (1,835) of households are extremely low-income, higher than the City’s 29%.⁴³ As new investment comes to the neighborhood, residents with higher incomes and the ability to pay more for housing may be drawn to make their home in Upham’s, potentially driving up housing costs and posing a risk to lower-income households.



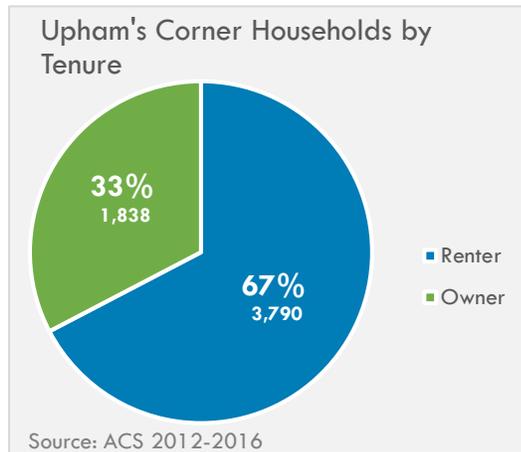
- The neighborhood continues to be racially and ethnically diverse, although the percentage of non-White residents has decreased slightly since 2010.** Higher-income households in Upham’s are disproportionately White, while lower-income households are disproportionately non-White. Because displacement primarily impacts those with lower income, residents of color are at greater risk. Going forward, a rising rate of White residents in Upham’s Corner would imply population replacement of non-White residents.

⁴² Per HUD definitions, low-income households are those with incomes below 80% of the HUD Area Median Family Income (HAMFI). HAMFI is not necessarily the same median as that derived from Census or ACS data, as it undergoes a series of adjustments.

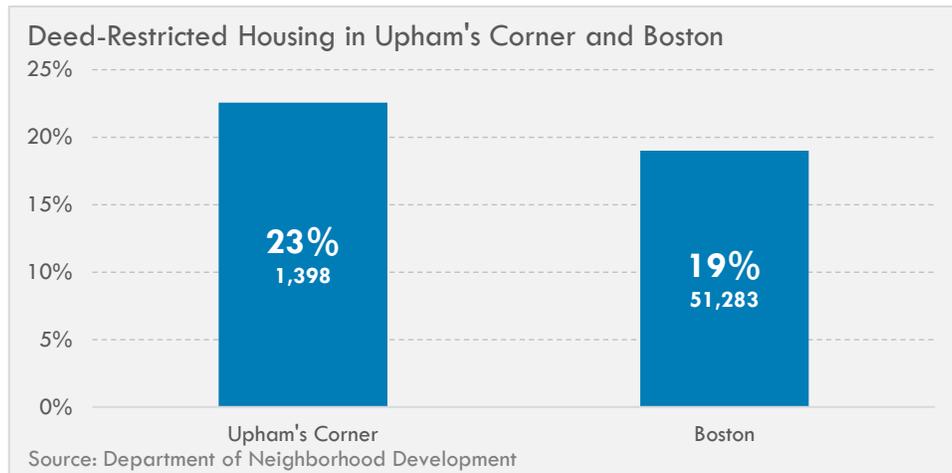
⁴³ Below 30% HAMFI.



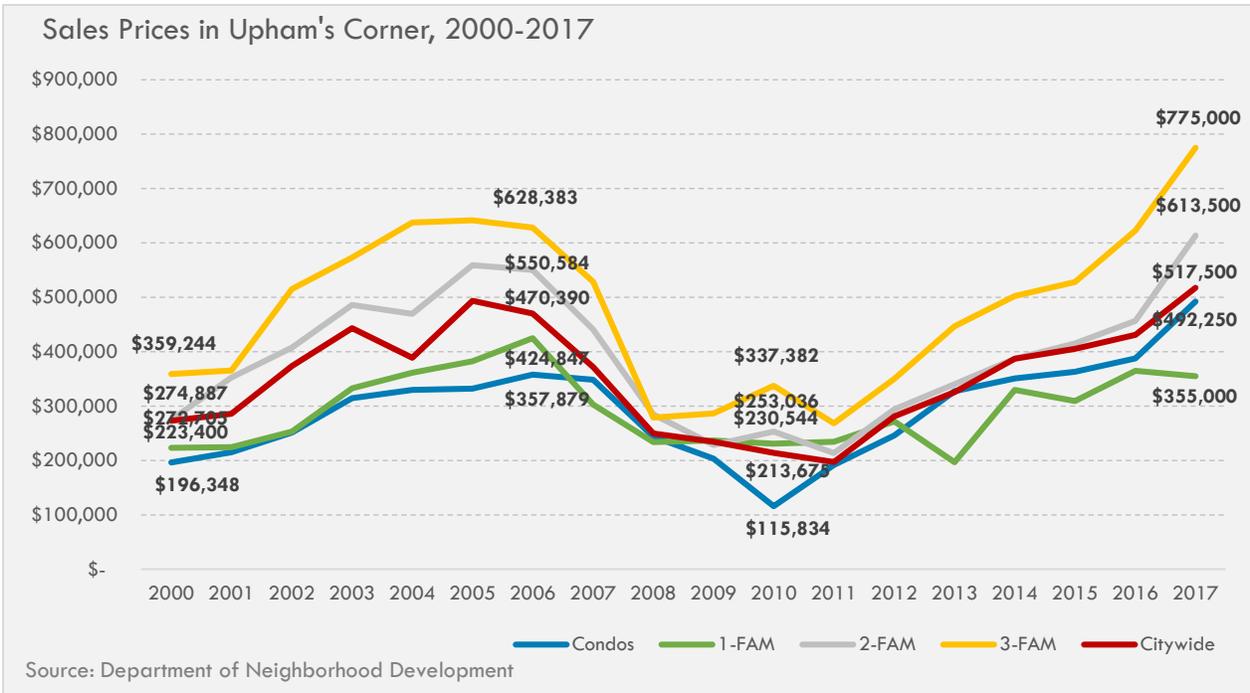
- More than half of all households in Upham's Corner are renters, who are usually at higher risk of displacement than homeowners.** The 67% rate of renting in the neighborhood is slightly higher than in the overall City of Boston (65%). Renter households in market-rate units tend to be particularly vulnerable to displacement or replacement as housing prices increase following investment in the area.



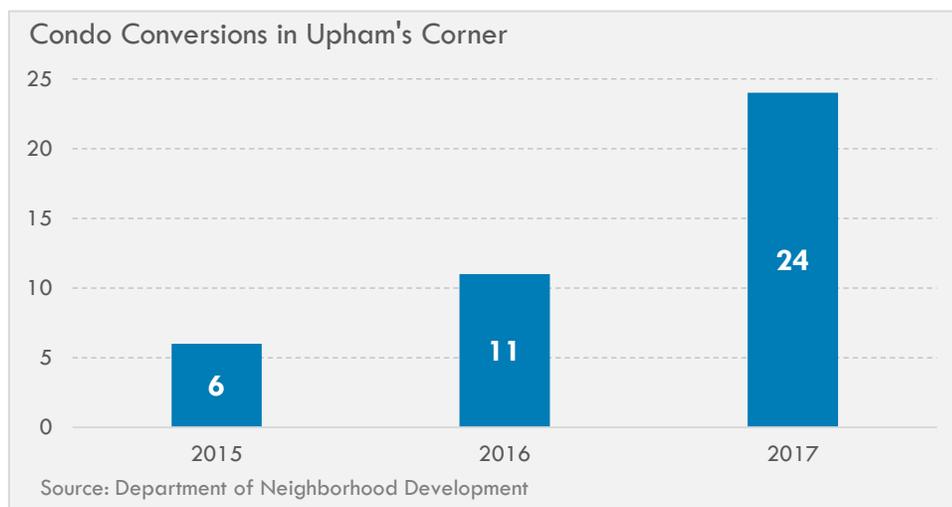
- **About 23% of Upham’s Corner’s housing stock is deed-restricted affordable, higher than the City of Boston’s 19%.** New housing development in the neighborhood has increased this supply: 24% of new units added since 2011 are deed-restricted to low- and moderate-income households. Going forward, it will be important to track and preserve the supply of deed-restricted units since these are a critical component of ensuring long-term housing stability for existing residents and economic diversity in the neighborhood.



- **Housing costs have risen since 2014 for select housing types and tenures.** Rental prices for a two-bedroom apartment decreased slightly since 2014, while one-bedroom and three-bedroom rents slightly increased. Homeownership opportunities became costlier for condos and two- and three-family houses, all of which increased above 2006 peak prices since 2011, while the price of single-family houses decreased. This drop may be due in part to the increase in housing production around Dorchester and surrounding neighborhoods during the last couple of years. Given the low-income levels of neighborhood residents, rising sales prices may present barriers to renter households hoping to buy as rents rise, and homeowners with low- or moderate-incomes who may not be able to afford mortgage payments along with increasing property taxes. These combined factors may exacerbate displacement or population replacement following new investment in the neighborhood.



- The neighborhood's housing stock is particularly vulnerable to condo conversions, which have doubled every year for the past three years.** While there have been only 41 condo conversions since 2015 (less than 1% of the housing stock), the yearly rate, or increase, is notable. Rental units in older, small-scale multifamily buildings tend to be at a higher risk of redevelopment and condo conversion. In Upham's Corner, more than 60% of the housing units were built before the 1950s, and almost 50% are in structures with 3-to-4 units, making them especially susceptible to redevelopment. Condo conversions remove housing units from the rental market and increase the supply of higher-priced housing that requires a down payment, which presents barriers to residency for households with modest incomes.⁴⁴



⁴⁴ In Boston, ordinances have been placed to give some protections to tenants in buildings with four or more units that are being converted to condominiums, including the option of first refusal. However, many households, particularly those with low and moderate incomes, may not be able to afford to purchase the property and have to leave.

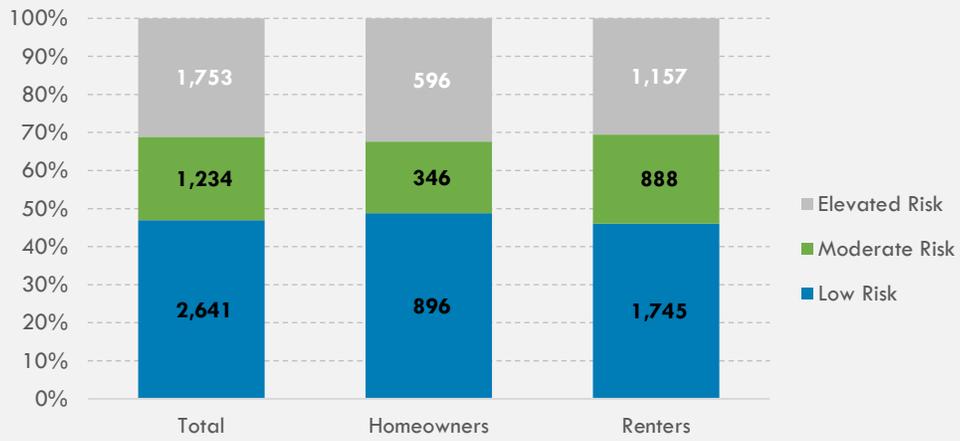
DISPLACEMENT RISK ASSESSMENT OF UPHAM'S CORNER

DND uses a methodology to assess risk of displacement in Boston based on 3 categories and 14 metrics of analysis:

- Vulnerable populations
 - Race/ethnicity
 - Linguistic isolation
 - Low educational attainment
 - Renter status
 - Housing cost-burden rate
 - Poverty level
- Amenities that increase risk
 - Access to buses
 - Access to rapid transit
 - Proximity to affluent areas
 - Proximity to business cores
- Market changes
 - Property appreciation
 - Rent appreciation
 - Affordable housing supply
 - Commercial development

Applying this Displacement Risk Assessment to Upham's Corner, DND assessed what, if any, risk residents may face due to increased investment in the area, such as new housing, businesses, or public infrastructure. The analysis found that the majority of households currently in Upham's Corner are at low or moderate risk of displacement, but an estimated 31% (1,753) of all households in Upham's Corner are at an elevated risk of displacement. Those in the latter category include renters in market-rate units that have incomes lower than \$75,000 and homeowners with incomes lower than \$50,000. About 22% (1,234) of households are at moderate risk of displacement, including those with rental vouchers for market-rate housing, renters with incomes higher than \$75,000, and homeowners earning between \$50,000 and \$75,000. Finally, 47% (2,641) of households are at low risk of displacement, as they live in deed-restricted affordable units or are homeowners with incomes higher than \$75,000.

Displacement Risk by Tenure in Upham's Corner



Source: Department of Neighborhood Development

The table below summarizes DND’s analysis of displacement risk in Upham’s Corner:

Table: Department of Neighborhood Development Displacement Risk Analysis for Upham’s Corner

	Upham’s Corner Block Groups		Dorchester Census Tracts	
Low Risk				
Households living in deed-restricted housing	1,745	31%	7,386	17%
Homeowners making more than \$75,000	896	16%	8,294	19%
Total	2,641	47%	15,680	36%
Moderate Risk				
Households with a rental voucher in market-rate housing	367	7%	7,222	17%
Renters making more than \$75,000	521	9%	5,731	13%
Homeowners making between \$50,000 and \$75,000	346	6%	2,975	7%
Total	1,234	22%	15,928	37%
Elevated Risk				
Renters without subsidies/income restricted housing making less than \$75,000	1,157	21%	8,260	19%
Homeowners making less than \$50,000	596	11%	3,691	8%
Total	1,753	31%	11,951	27%
Total Households	5,628		43,562	

Despite these findings, new investment in the neighborhood may be associated with an increase in rents and home values, and therefore greater risk of displacement for residents going forward.

NEIGHBORHOOD CHANGE LITERATURE REVIEW

This section reviews existing literature on the impact of new residential development on surrounding housing prices; the connection between art, Arts & Innovation Districts, and gentrification and displacement; and innovative programs to manage neighborhood change that are relevant in the context of Upham’s Corner.

KEY FINDINGS: Residential Development and Housing Prices

- **The impact of new residential development on surrounding home prices is more dependent on type of development than number of units.** Nationwide, we've seen gains in the supply of high-end units and the loss of low- and moderate-priced units over the past decade: the number of units renting for over \$2,000 a month almost doubled from 2005 to 2015 (adjusting for inflation), while units renting below \$800 fell by 2%.⁴⁵ According to the literature, luxury and high-income housing tends to attract more developments of this type, raising overall housing costs within a specific neighborhood even if the new supply results in a price decrease at the regional scale. If the new housing supply is primarily targeted to higher income groups, low- and middle-income households do not directly benefit.⁴⁶
- **Increasing the supply of housing may help decrease the risk of displacement in low-income neighborhoods.** According to one research study by California's Legislative Analyst's Office (LAO), increasing construction of market-rate units reduces housing costs for low-income households within a specific neighborhood, helping to mitigate displacement. Specifically, the study found that changing from a low-construction neighborhood to a high-construction neighborhood declined the probability of displacement from 46% to 26%, when compared with similar neighborhoods that haven't added much new housing.⁴⁷ It is important to remember that this is a single study, and the findings have not been replicated within the broader literature.
- **It can take an average of 30 years to lower housing prices significantly through "filtering," but filtering time depends on the market.** Filtering refers to the process by which older houses 'filter-down' to moderate- and low-income households as high- and middle-income households move into newer, higher-priced homes. Research shows that the rent of a typical unit in a stable market declines an average of 0.31% per year, resulting in a 9.3% decrease in price after 30 years. This decrease in price is also dependent on the type of rental market: in neighborhoods with a hot rental market, land values and rental prices may rise independent of the type of housing stock, decreasing the possibility of filtering.⁴⁸

⁴⁵ America's Rental Housing 2017. Joint Center for Housing Studies of Harvard University. 2017. http://www.ichs.harvard.edu/sites/ichs.harvard.edu/files/harvard_ichs_americas_rental_housing_2017.pdf and Goodman, Laurie. Housing supply falls short of demand by 430,000 units. Urban Institute. June 30, 2016. <https://www.urban.org/urban-wire/housing-supply-falls-short-demand-430000-units>

⁴⁶ Blumenthal, Pamela M, John R. McGinty, and Rolf Pendall. Strategies for Increasing Housing Supply in High-Cost Cities: DC Case Study. Urban Institute. August 2016. https://www.urban.org/sites/default/files/publication/83656/2000907-strategies-for-increasing-housing-supply-in-high-cost-cities-dc-case-study_0.pdf

⁴⁷ Perspectives on Helping Low-Income Californians Afford Housing. Legislative Analyst's Office. Feb. 09, 2016. <http://www.lao.ca.gov/Publications/Report/3345>

⁴⁸ Badger, Emily. How to make expensive cities affordable for everyone again. The Washington Post. Feb. 19, 2016. https://www.washingtonpost.com/news/wonk/wp/2016/02/19/how-to-make-expensive-cities-affordable-for-everyone-again/?noredirect=on&utm_term=.f80713472643 and Rosenthal, Stuart S. Are Private Markets and Filtering a Viable Source of Low-Income Housing? Estimates from a "Repeat Income" Model. American Economic Review. Vol. 104, No. 2. Feb. 2014. Pp. 687-706. <https://www.aeaweb.org/articles?id=10.1257/aer.104.2.687>

- **Production of subsidized housing has double the impact on reducing displacement risk when compared to market-rate unit production.** A study by the Berkeley Institute of Governmental Studies found that the production of subsidized units, including those built with Low-Income Housing Tax Credits (LIHTC) and other public subsidies, helps mitigate displacement in areas undergoing gentrification. This is especially true at the neighborhood level, where new luxury buildings can exacerbate gentrification and increase displacement risk.⁴⁹

KEY FINDINGS: Cultural/Art Districts and Gentrification/Displacement

- **Different art activities are associated with different types and levels of neighborhood change.** Commercial art industries such as film, music, and design-based industries have the strongest association with gentrification, while fine arts (e.g., visual and performing arts) are associated with stable, slow growth neighborhoods. Low-income neighborhoods that are home to a diversity of community artists and art spaces tend to experience change without high rates of resident turnover.⁵⁰
- **The arts may increase property values and economic development in a neighborhood, but artists do not necessarily benefit from the changes.** An influx of arts-associated development (e.g., studios, refurbished lofts, galleries) can spur high-cost development in previously industrial areas, leaving artists without affordable living and working spaces.⁵¹ Artists can inadvertently “artwash” neighborhoods, their presence attracting a different, higher-income population.⁵² While artists may benefit in the short-term from economic changes (e.g., greater access to patrons who purchase art), their generally lower-income status can result in their displacement in the medium- and long-term, sometimes referred to as “the SoHo effect.”⁵³ At the same time, recent experiences in London and Los Angeles have demonstrated that artists can become the target of community groups that see them as complicit in gentrification.⁵⁴

⁴⁹ Zuk, Miriam and Karen Chapple. *Housing Production, Filtering and Displacement: Untangling the relationships*. Berkeley Institute of Governmental Studies. May 2016.

⁵⁰ Grodach, Carl, Nicole Foster, and James Murdoch III. *Gentrification and the Artistic Dividend: The role of the arts in neighborhood change*. National Endowment for the Arts. 2014. <https://www.arts.gov/sites/default/files/Research-Art-Works-Arlington2.pdf>

⁵¹ Rich, Meghan Ashlin. *Arts Districts Without Artists*. MetroPolitics. March 23, 2015. <http://www.metropolitiques.eu/Arts-Districts-Without-Artists.html> and Rich, Meghan Ashlin. ‘Artists are a tool for gentrification’: maintaining artists and creative production in arts districts. *International Journal of Cultural Policy*. Sep. 06, 2017.

<https://www.tandfonline.com/doi/abs/10.1080/10286632.2017.1372754?src=recsys&journalCode=gcul20>

⁵² Francis, Anna. ‘Artwashing’ gentrification is a problem – but vilifying the artists involved is not the answer. *The Conversation*. Oct. 5, 2017. <https://theconversation.com/artwashing-gentrification-is-a-problem-but-vilifying-the-artists-involved-is-not-the-answer-83739>

Mould, Oli. *Why culture competitions and ‘artwashing’ drive urban inequality*. Open Democracy UK. Sept. 14, 2017. <https://www.opendemocracy.net/uk/oli-mould/why-culture-competitions-and-artwashing-drive-urban-inequality>

⁵³ O’Sullivan, Feargus. *The Pernicious Realities of ‘Artwashing’*. CityLab. June 24, 2014. <https://www.citylab.com/equity/2014/06/the-pernicious-realities-of-artwashing/373289/> and Cunniffe, Eileen. “Art-Washing” – A New Name for a Not-So-New Side Effect of Gentrification. *Nonprofit Quarterly*. Oct. 28, 2016. <https://nonprofitquarterly.org/2016/10/28/art-washing-new-name-not-new-side-effect-gentrification/>

⁵⁴ O’Sullivan, Feargus. *The Pernicious Realities of ‘Artwashing’*. CityLab. June 24, 2014. <https://www.citylab.com/equity/2014/06/the-pernicious-realities-of-artwashing/373289/>

Nazaryan, Alexander. *The ‘Artwashing’ of America: The battle for the soul of Los Angeles against gentrification*. *Newsweek*. May 21, 2017. <http://www.newsweek.com/2017/06/02/los-angeles-gentrification-california-developers-art-galleries-la-art-scene-608558.html>

- **Relabeling an area as an arts innovation or cultural district is not enough to prompt wholesale revitalization.** A district designation may not lead to increased economic development and social support for local residents, businesses, and arts and culture communities. Amenities such as public transit and housing availability are crucial to ensure a range of residents are able to engage in opportunities presented by a new district.⁵⁵

CURRENT BOSTON STRATEGIES TO MANAGE NEIGHBORHOOD RESIDENTIAL CHANGE

In order to understand the City’s strategies for managing neighborhood change and mitigating displacement, MAPC met with various government offices and non-government organizations involved in this effort. The list includes:

- Office of Housing Stability⁵⁶
- Housing Innovation Lab⁵⁷
- Boston Home Center⁵⁸
- MAPC Public Health Division⁵⁹

I. Office of Housing Stability (OHS)

The Office of Housing Stability (OHS) is the first entity in the nation that is exclusively focused on preventing displacement and homelessness. The two main actions by which OHS accomplishes its objective is through legislative policy and direct support to tenants and landlords. Recent legislation pursued by OHS includes the Jim Brooks Stabilization Act, Tenant’s Right to Purchase Bill, and the Right to Counsel Bill. These bills were part of Mayor Marty Walsh’s 2017 five-bill anti-displacement legislative agenda, but unfortunately none passed the Massachusetts Legislature.

The majority of OHS’ current work is focused on responding to constituents in housing crises, including displacement by natural disasters, rent increases, and possible evictions. Services offered by OHS include information on tenant-landlord rights and responsibilities, housing dispute resolution, and landlord counseling. OHS staff provides in-house support to tenants and landlords, and partners on a case-by-case basis with other city agencies and NGOs, such as Greater Boston Legal Services (GBLS), Inspectional Services, Elderly Commission, Fair Housing and Equity, and Immigrant Advancement.

In addition, OHS is involved in preventing large-scale displacement stemming from building clear-outs. While just-cause policies protect homeowners from evictions, renters still face no-fault evictions and non-renewal of leases. To address this, OHS partners with tenant advocacy groups and GBLS to negotiate long-term leases until tenants can find subsidized housing. OHS is piloting a Landlord Guarantee Program to house previously homeless households through incentives to landlords, including funding for possible damage to the housing unit. The Office also has a Landlord Counseling Program, Pathways to Homeownership Program (in

⁵⁵ Thorton, Sean. *Cultural Districts and the Potential for Urban Development*. University of Chicago. 2012. <http://ssa.uchicago.edu/cultural-districts-and-potential-urban-development>

⁵⁶ February 2, 2018.

⁵⁷ February 5, 2018.

⁵⁸ February 20, 2018.

⁵⁹ February 23, 2018.

coordination with the Boston Home Center), and the Metro List weekly newsletter of affordable housing opportunities.

Specifically in relation to Upham's Corner and the greater Dorchester neighborhood, OHS is partnering with Northeastern University on the Stable Ground Program. This initiative studies the impact of housing instability on residents and combines legal and arts elements to facilitate discussion around displacement. MAPC met with NuLawLab, the Northeastern University partner, to learn more about this program.

II. **Housing Innovation Lab (iLab)**

MAPC met with Marcy Ostberg, Director of the Housing Innovation Lab (iLab), to understand how their initiatives relate to managing neighborhood change. iLab's objective is primarily to identify and develop innovative methods to increase the city's housing supply through small-scale pilots. There are five initiatives that iLab was in the midst of piloting when we met:

- Density Bonuses for Affordable Housing: iLab created two methodologies for a density bonus in exchange for affordable housing units in the JP/Rox Plan and the Dot Ave Plan. The Dot Ave Plan density bonus aims to create affordable spaces for small businesses as well as residents.
- Compact Policy: This City-wide policy allows for a range of unit sizes in new multi-unit housing projects.
- Housing + Public Assets: This program aims to build housing with an affordable component on 83 vacant, underused, and in-use City parcels. iLab recently released an RFI for interested developers, due back by the end of March 2018. There may be potential to pilot this program in Upham's Corner.
- Homesharing: In partnership with the private start-up Nesterly, this program pairs elderly homeowners with renters willing to do housework in exchange for lower rental costs.
- Accessory Dwelling Units (ADUs): Initially focused on "carved out" ADUs, iLab is now working on a "plug-in house" with current Harvard Loeb Fellow James Shen.

In addition to the aforementioned projects, iLab is in the exploratory phase of three projects aimed at mitigating displacement:

- Good Landlord Program: iLab would provide funding for upgrading housing units owned by small landlords that don't want to pass on costs to renters. This is a partnership with the Boston Home Center. This work could be piloted in Upham's corner.
- Shared Homeownership: This pairs households interested in purchasing a house with a CDC or a nonprofit to split costs. The household owns a share of the unit and receives a portion of the equity in the event of selling. This project is in the early discovery phase.
- Rent-to-Own: This project is in the early discovery phase.

III. **Boston Home Center (BHC)**

MAPC met with BHC Deputy Director Maureen Flynn, to understand the ways in which they address displacement. BHC primarily operates as a homeownership division within DND, and works to support moderate- and low-income homebuyers and homeowners in Boston. Two main programs currently support the City's anti-displacement efforts:

- Down Payment Assistance: BHC provides loans for first-time homeowners with incomes of 100% AMI or less. The loans cover up to 3% of the down payment, are interest-free, and only repayable if the unit is sold or refinanced. BHC grants an average of 100 loans a year through this program.
- Homeowner Assistance: These loans assist homeowners with repairs related to health or safety issues. BHC provides an interest-free loan of up to \$20,000, repayable only if the unit is sold or refinanced. BHC grants an average of 187 loans a year through this program.

Flynn also mentioned three initiatives BHC is in the process of creating that have anti-displacement aspects:

- Barriers to Homeownership: This is a research project focused on understanding what keeps households, especially those of color, from purchasing a house. A second phase of this project intends to find solutions to the identified barriers. BHC is partnering with Massachusetts Competitive Partnership (MACP) on this work.
- Good Landlord Program: Described above under the iLab initiatives.
- Foreclosed Housing Purchase Initiative: The goal of this program would be to identify and purchase foreclosed properties to make them available to low-income households. The pilot project is focused on properties around the Fairmount Corridor. BHC is partnering with the community organization City Life to identify foreclosed properties eligible for purchase in the area, to date 66 properties have been identified. This project is being submitted to the Fannie Mae Sustainable Communities Innovation Challenge.

IV. MAPC Public Health Department

MAPC Housing staff met with Barry Keppard, MAPC Public Health Director, to understand the Massachusetts Department of Public Health Community-Based Health Initiative (CHI), its Determination of Need (DoN) program, and connections to housing stabilization. Hospitals must use 5% of their expenditures to provide community health investments. In 2017, the DoN program widened its scope to address six common social determinants of health, including housing. Housing as a DoN Health Priority includes loan and grant programs for housing rehabilitation, as well as direct investment in community land trusts or capital investment in housing development programs to increase the supply of affordable housing and prevent displacement.

Currently, the MAPC Public Health Division is working with Boston Medical and the Boston Children's Hospital to create a variety of housing-related initiatives under the DoN program.

These include:

- Housing project investments: Capital and operating investments for affordable housing projects in Dorchester and Roxbury.
- Housing support service collaborations: Financial support for increasing capacity of community development corporations in Dorchester and Roxbury.
- Hybrid housing project investment: Capital improvements and project management support for housing elderly, disabled, and medically-complex individuals.
- Community engagement + housing stabilization: Community engagement and financial assistance to individuals and families facing eviction around Boston.

- Social impact fund: Fund for affordable housing projects around Boston, including in Ashmont, Dorchester, and Roxbury.

RECOMMENDATIONS TO FURTHER MANAGE NEIGHBORHOOD CHANGE AND MITIGATE RESIDENTIAL DISPLACEMENT IN UPHAM'S CORNER

Based on the above analysis, research, and discussion with various City offices and departments, MAPC recommends the City of Boston pursue implementation of anti-displacement strategies tied to local zoning, capacity-building, state legislation, programs, and development.

I. Strengthen Boston's citywide Condominium Conversion Ordinance to limit the number of conversions in a calendar year.

Why?

Moderate- and high-income residents attracted to Upham's Corner by its location, transit accessibility, and new investment are more likely to have the resources and inclination to seek out for-sale rather than rental housing. If new construction does not provide the supply they demand, then owners of existing rental properties may find it profitable to convert their properties to a condominium form of ownership and sell off the units individually rather than renting them. Older, smaller multifamily structures comprising rental units, like many in Upham's Corner, are especially vulnerable to condominium conversions. They can be acquired at competitive prices and resold for a considerable profit, depleting the city's rental housing stock in the process, as is happening in East Boston, the City of Chelsea, and elsewhere. It is important to protect rental housing in Upham's Corner and similar communities throughout Boston so that those without down payments can continue to have the opportunity to live there.

How?

Boston's existing ordinance guarantees substantial rights to tenants in buildings undergoing condo conversion, but it does not limit the removal of rental units from the housing supply through conversion. Instead, property owners and developers are free to convert as long as they follow the tenant protections laid out by the existing Condominium Conversion Ordinance. To strengthen this ordinance and protect the vulnerable rental housing stock in Upham's Corner and elsewhere in Boston, the City should limit the number of rental units that can be converted to condominiums in a calendar year.

Next Steps

- Assess similar ordinances with condominium conversion limits, such as the City of Somerville's Condominium Conversion Ordinance and San Francisco's condominium lottery, to inform draft amendments to Boston's ordinance.
- Gather available data from Boston Housing Court, Office for Housing Stability, and the Assessor's Office to determine the frequency of condominium conversion in the area.
- Develop a detailed strategy to reach tenants, landlords of small properties, tenants' rights organizations, property owners' associations, and elected officials in order to build support for the amendment.
- Amend the existing condominium conversion ordinance as described above and work with the City Council to adopt the changes.

Key Considerations

- In light of the recent complications surrounding the Jim Brooks Community Stabilization Act, the City should be prepared to conduct substantial outreach and spend resources building support for this zoning amendment.
- The City of Somerville's Condominium Conversion Ordinance was enacted in 1985 and has recently faced legal challenges that may result in its repeal. The City should learn from Somerville's experience as well as other cities across the country with limits on condominium conversion, and avoid the same pitfalls.

II. Increase the capacity of Boston's Office of Housing Stability (OHS).

Why?

New investment in neighborhoods like Upham's Corner can be associated with housing affordability challenges for lower-income households. These residents need a resource when in crisis. The [OHS](#) currently receives more than 200 calls a week, including an average of 115 discrete new cases from households that have been displaced or are under threat of displacement. While OHS has staff dedicated to program and policy development, most of the staff's time is spent addressing tenant crises, leaving little time to collect and analyze displacement data to find patterns and create tenant stabilization policies. A lack of resources and staff time have also limited community outreach, narrowing the number of households aware of OHS services.

How?

The City should increase OHS capacity in several areas. First, ensure adequate case management capacity to address immediate need for tenant support as it arises. Second, expand services for landlords and consider ways to incentivize participation in landlord trainings. Third, create capacity for policy development in response to OHS' on-the-ground experience. Finally, track residential addresses of callers to enable eviction and eviction-risk analysis and to create targeted programs and policies.

Next Steps

- Analyze OHS capacity and ability to meet both existing and projected future demand for services. Determine additional staff required, and what additional expertise is needed in-house (i.e., case management, data analysis, policy); alternatively, determine which, if any, City departments could partner with OHS to supplement capacity.
- Publicize and promote existing OHS programs, including eviction support and dispute mediation, to encourage wider participation. This can be done through development of mailers or other materials, hosting of public events, increased web and social media presence, engagement with local community groups, coordination with other City agencies, and other strategies.
- Expand the Landlord Counseling program curriculum to include strategies for ensuring eviction is a last resort, with incentives such as additional technical support or mediation assistance through OHS. Add a recurring landlord-focused evening clinic to accompany the current housing search and tenant rights clinic.
- Compute and geocode callers' residential addresses in a consistent manner to facilitate up-to-date tracking of housing instability trends and patterns.

III. Redevelop and continue advocating for an anti-displacement legislative agenda.

Why?

In Massachusetts, municipal policies to stem or mitigate displacement often require the passage of a home rule petition by the state Legislature. To date, most such efforts have failed. A comprehensive set of city-wide anti-displacement programs and policies, such as the five items on Mayor Walsh's Anti-Displacement Legislative Agenda that were considered by the state Legislature in the 2017-2018 legislative session, are the best way to reduce displacement preemptively and to mitigate its effects proactively. The bills in the Mayor's legislative package included a bill to make legal representation in eviction proceedings a right, an amendment to codify inclusionary zoning, conditions for tenant eviction and notification, tenants' right of first refusal, and tax credit incentives for landlords renting at below-market rents.

How?

The City should undertake renewed efforts to develop and build support for anti-displacement policies. Convene a working group, perhaps including City Councilors who recognize this issue so as to gain constituent buy-in. Develop a step-by-step plan, including refileing or developing new legislation and conducting a public process to build support.

Next Steps

- Invite the Massachusetts Smart Growth Alliance, CHAPA, MAPC, and other allied entities to discuss repackaging of an anti-displacement legislative agenda, including which 2017-2018 items to recycle, new strategies to add, and a campaign for building support.
- Engage with local tenant and anti-displacement groups to form coalitions at the city level to draw attention to this issue and lobby local representatives.
- Governor Baker has committed significant resources to affordable housing, and is a natural ally on anti-displacement efforts. Work with his office to develop agenda and build support in the Statehouse.

IV. Improve messaging around housing issues and City programs and resources.

Why?

The City offers a wealth of housing resources, but needs to promote them more effectively so residents are aware of their rights and what the City can do to support them. This will help to stabilize residents and build good will between them and the City, ultimately improving future planning and development processes.

How?

The City should assign a liaison to coordinate publicity efforts across various housing departments and offices, and consider engaging a consultant to produce the necessary materials. Efforts could include increased and user-friendly web presence, non-traditional digital outreach platforms, a series of community events, a traveling promotional shop akin to the iLab's mobile tiny house, mailers and pamphlets, and rebranding of OHS as a one-stop shop for tenant and landlord needs.

Next Steps

- Look at other city programs and lessons learned for outreach strategies, particularly those nimble enough to reach at-risk households.
- Develop a campaign, with or without the support of a consultant.
- Assign a current city staff person the role of publicity coordinator across municipal housing offices.
- Enlist consultant support as needed to execute campaign, such as with graphic or web design.

V. Create an Upham's Corner Artist Housing Task Force.

Why?

Artists and small business owners around Boston who struggle to live and work in the city may be best suited to identify strategies to address the affordability challenge. As part of the Upham's Corner Implementation, an Artist Housing Task Force could provide greater insight into how development is affecting artists and what the City can do to ensure they and small business owners continue to have a home in Upham's Corner and Boston.

How?

The City should convene a multidisciplinary Task Force comprising local artists, representatives from arts organizations, market and affordable real estate developers, technical experts, and municipal staff. Their charge should be to study and vet strategies to create and preserve affordable housing and workspaces for artists. The Task Force should propose policy and program recommendations to help artists remain in the neighborhood and city.

Next Steps

- The City should partner with local community organizations and leaders to identify appropriate Task Force members and key issues they should address.
- Task Force members should have a range of skills and include artists, art organizations, developers, municipal staff, and other stakeholders who have the experience and connections to facilitate discussion and strategy development.
- The City should assign staff from the Office of Arts and Culture and DND to work with the Task Force. There should be sufficient capacity to provide guidance, prepare materials, assist in developing recommendations, and serve as a liaison between the Task Force and various City offices that may be charged with implementing Task Force recommendations.
- Over a 6-12-month period, the Task Force should develop a work plan with goals and a timeline for achievement.

Key Considerations

- The Task Force must have clear and specific goals towards which it is working.
- Strategies identified by the Task Force should be clear and include a path for implementation.
- While developing a work plan and recommendations, and throughout implementation, the Task Force should have an ongoing audience with municipal staff to promote good will, build relationships, and foster understanding of implementation processes.

VI. Increase the supply of deed-restricted affordable artist housing.

Why?

Artist housing produces demonstrated benefits for tenants, as well as the surrounding neighborhood and greater region: artists benefit from affordable housing, greater networking, and collaboration. Community members often view artist housing as an enhancement of the existing neighborhood, and studies show it may heighten neighborhood revitalization. Areas with artist housing often see an increase in new businesses, shoppers, and artists' patrons.

How?

Using funds and processes already in place, the City can partner with private developers to build income-restricted artist housing in the Upham's Corner area. The City should explore successful development of artist housing across the country by private, public, and non-profit developers using a variety of funds, including federal, state, and local affordable housing sources, philanthropic donations, and private investment. Federal Low-Income Housing Tax Credits (LIHTC) can be used to build artist housing as a result of the 2008 Housing and Economic Recovery Act, which states that housing projects using LIHTC can give preference to those "who are involved in artistic or literary activities" per H.R. 3221, Sec. 3004, g9C.⁶⁰

Next Steps

- Identifying City funding sources or potential funding sources, such as PILU or earmarking a small percentage of the Neighborhood Housing Trust Fund toward gap financing for projects that include an artist housing component.
- Because artist housing is sometimes criticized for using LIHTC credits for a population that may not face as great unmet housing need as other low-income households, the City should assess the housing needs of artists in Upham's Corner and Boston (including low-income status and cost burden) to develop an appropriate strategy for development (including the relative need compared to other groups and the number of artist's units to develop).⁶¹
- Conduct workshops with artists of color in Upham's Corner to assist them in attaining Artist Certification so they are eligible for affordable artist housing.
- Work with the development community, particularly non-profits, to publicize the opportunity to develop artist housing with the City's support.
- Ensure the Office of Fair Housing is prepared to provide technical assistance to developers with marketing units to artists and conducting lotteries.
- Consider working with DHCD to include artist housing in the next Qualified Allocation Plan to guide distribution of LIHTC funds to this type of development.

Key Considerations

- In some cases, affordable artist housing has been found to be white-segregated, with rents above affordable housing limits, and built in more affluent areas, with better amenities and architectural finishes than affordable housing in racially segregated or diverse

⁶⁰ Housing and Economic Recovery Act of 2008. 110th Congress. 2008. <https://www.gpo.gov/fdsys/pkg/PLAW-110publ289/pdf/PLAW-110publ289.pdf>

⁶¹ Semuels, Alana. *The Artist Loft: Affordable Housing (for White People)*. *The Atlantic*. May 19, 2016. <https://www.theatlantic.com/business/archive/2016/05/affordable-housing-for-white-people/483444/>

neighborhoods.⁶² To avoid such issues of inequity, support projects with greater depths of affordability in Upham's Corner and mixed-income development that is not designed to be luxury housing. Ensure affordable artist housing projects adhere to Fair Housing rules.

- Artists may not keep standard financial files, rely on the cash economy, and may have higher levels of bad credit and outstanding debts that present barriers to qualifying for deed-restricted affordable housing. Explore a strategy to address these barriers in Boston, such as how Habitat for Humanity in New Orleans used earmarked funds from donors to help musicians pay off outstanding debts and found alternative ways to vouch for artists' income and ability to pay housing costs.⁶³
- Artists' housing, especially if it includes work space, may require different features than general housing, such as utility sinks, soundproof rooms, or larger doors.⁶⁴ These needs may be at odds with unit size and layout requirements attached to various affordable housing funding sources. Explore how City funds can help address these design challenges, and work with developers to ensure spaces meet artists' needs.
- Artist housing relies primarily on LIHTC, historic tax credits, cultural facility grants, and philanthropic gifts. Often, only non-profits can access the public funding sources needed to create affordable artist housing.⁶⁵ Work with local non-profit developers to promote artist housing development opportunities through a focus group or targeted RFP process.

VII. Give affordable housing preference to residents experiencing housing cost burden.

Why?

In areas like Upham's Corner, residents experiencing housing cost burden and especially rent burden, are at an increased risk of displacement as the market grows stronger. Setting aside a portion of deed-restricted affordable units for these residents will help them stay in their communities even as housing costs rise, minimizing disruption to social support systems, school enrollment, and access to employment and transportation. In areas undergoing the kinds of changes Upham's Corner is seeing, where residents face increased risk of displacement, this strategy can increase housing stability.

How?

The City of Boston is currently exploring the best strategy to give affordable housing preference to city residents experiencing housing cost burden. A portion of new deed-restricted affordable housing units developed in Upham's Corner and others areas where new investment is likely to be associated with increased housing costs should be set aside for residents experiencing housing cost burden. The City should amend its existing Inclusionary Development Policy (IDP) to reflect this.

⁶² *The Rise of White-Segregated Subsidized Housing*. Institute on Metropolitan Opportunity, University of Minnesota Law School. May 2016. <https://www.law.umn.edu/sites/law.umn.edu/files/metro-files/imo-white-segregated-subsidized-housing-5-18-2016.pdf>

⁶³ Reckdahl, Katy. *Keeping Your Artists Close to Home*. Shelterforce. Jan. 11, 2017. <https://shelterforce.org/2017/01/11/keeping-your-artists-close-to-home/>

⁶⁴ *The Global Grid. Making a Place for Artists in New Orleans*. Smart Cities Dive. <https://www.smartcitiesdive.com/ex/sustainablecitiescollective/making-place-artists-new-orleans/120166/>

⁶⁵ *Developing Affordable Space for Artists: A Summary of Development Projects Funded by the Local Initiatives Support Corporation*. Community Partners Consultants, Inc., Local Initiatives Support Corporation, The Urban Institute. 2004. <http://www.lincnet.net/sites/linc//images/3814/Developing%20Affordable%20Space%20for%20Artists.pdf>

Next Steps

- Assess which neighborhoods are gentrifying or are likely to gentrify and what kind of housing cost burden current residents are experiencing there.
- Draft amendments to the IDP that require a set-aside for housing cost-burdened residents either citywide or at a smaller scale based on the findings of the assessment suggested above.
- Work with the community to build support for proposed changes. This may include information sessions in the community where City staff can display boards and handouts explaining the proposed changes and answer community questions. Reach out to community leaders to gain their support, and work with them on local events and distribution of information.
- Work with the City Council to adopt IDP changes.

Key Considerations

- Local preference is another strategy to target those at risk of displacement, but can be challenging to implement in a way that is compatible with Fair Housing laws and does not entrench segregation by preserving neighborhood racial makeup or by limiting greater diversity in socioeconomically homogenous communities.
- Ensure the set-aside for cost-burdened residents is appropriate for Upham's Corner, with no more than one-third of affordable units restricted in this way. Support mixed-income housing development that works for current residents and is available to new ones.

VIII. Monitor neighborhood change and reevaluate strategies to manage it as needed.

The City of Boston should track changes in demographics, housing stock, and the local economy over the coming years in order to gauge the magnitude of change in Upham's Corner and the efficacy of the above strategies so that new and different strategies can be implemented in response to shifting trends. Below is a menu of benchmark indicators that should be monitored.

- **Economic diversity.** Loss of economic diversity in Upham's Corner is a potential negative impact of the market inflation anticipated as a result of new investment in Upham's Corner. Increasing housing costs and values could mean low-income households have a harder time finding housing they can afford, and therefore may relocate. The City should monitor the number and share of low-income households in the neighborhood to help gauge the degree to which population replacement is occurring. Track: Median household income, number of low-income households, share of low-income households (ACS).
- **Racial and ethnic diversity.** Market inflation can negatively impact lower-income households; because they tend to be disproportionately non-white, it also disproportionately impacts non-white households. New investment in Upham's Corner, therefore, potentially poses a risk to the neighborhood's racial diversity. Track: Populations of color, share of black or African American, share of other minority populations (Census).
- **Families with children.** Recent real estate trends make it harder for families to find a home. Subdivision of large homes into multiple condominiums decreases the supply of family housing. Meanwhile, smaller units being developed are not suitable to families with children. Lastly, an inflating market means lower-income families will have even more trouble securing housing. Tracking the number of families with children in Upham's Corner helps develop an understanding of how a changing city is accommodating them. Track: Share and number of families with children (Census).

- **Out-migration.** In addition to the racial and ethnic composition, it's important to understand which groups are increasing or decreasing as a result of migration. A decline in one group due to outmigration, as opposed to death and low rates of in-migration, could indicate certain households are struggling more than others to make Upham's Corner their home. Changes in the characteristics of in-migrants could cause a dramatic change in the neighborhood's demographic profile, even if the pace of outmigration remains constant. Track: Non-movers share of population by race/ethnicity (ACS).
- **Rent and sales price.** When a community's housing costs exceed the population's means, households either become increasingly cost-burdened, impacting their household budgets, or they relocate to areas with more affordable housing. Rental rates and housing sale prices must be monitored to determine how need for affordable housing is or is not changing. The City currently works with MLS and Rental Beast data, and is part of an MAPC initiative to collect data from craigslist and Padmapper at the point level. This data should be assess annually in Upham's Corner, by bedroom count and median rent. Track: Rental rate (MAPC Rental Database), median sales price (The Warren Group).
- **Condominium conversions.** As rental units are converted to condominiums, rental housing—which requires fewer household resources to occupy than homeownership—is lost. Additionally, new condos are typically updated before going on the market, resulting in housing that is costlier not only because it is for sale rather than rent, but also because its quality is improved. Similarly, to the rationale for monitoring rents and sale prices, condo conversions should be tracked because they are associated with increased cost of market-rate housing, which corresponds with increased need for subsidized affordable housing. Track: Type of unit (MAPC Parcel Database, City of Boston Assessor Records); or data collected through the Condominium Conversion ordinance (applications).
- **Equitable homeownership.** Renter households are particularly vulnerable to displacement and population replacement for the many reasons discussed in this report. Since people of color make up a disproportionate share of renter households, these communities are at greater risk. Furthermore, to own a home is to own an asset; without this opportunity, minority groups struggle to build wealth. Track: Homeownership gap by race/ethnicity (ACS).
- **Housing cost burden.** A combination of a lower-income population and inflating housing costs can result in a high rate of cost burden in an area. It is important to monitor the rate of cost burden among low-income households in particular because they can least afford increases in housing costs. Track: Percent and number of low-income households with housing cost burden (ACS).
- **Designated affordable housing.** Designated affordable housing is a critical resource for Upham's Corner's low-income population. As the market inflates, this housing stock becomes even more important. The City should take steps to preserve this housing stock and increase it along with market-rate housing. Track: Number of deed-restricted affordable housing units (DHCD).

ADDITIONAL INFORMATION AND BEST PRACTICES FOR MANAGING RESIDENTIAL NEIGHBORHOOD CHANGE

Cities around the country that share some of Boston's demographic characteristics and housing challenges have implemented innovative programs and policies to manage neighborhood change and prevent displacement. The below research informed our recommendations above, and can be used as a menu for the City to understand each strategy better and/or to choose additional strategies to implement in Upham's Corner down the line.

Strategy: Affordable Artist Housing

Overview

Public and private funds are set-aside to support artist housing, along with projects and work spaces. Widespread Low-Income Housing Tax Credit (LIHTC) funding for artist affordable housing is made possible through the 2008 Housing and Economic Recovery Act (HERA), which states that housing projects can give preference to those “who are involved in artistic or literary activities.”⁶⁶

What does it do?

Funds housing developments that are deed-restricted and earmarked for artist households.

Key Benefits

- Housing is permanently restricted for artists that are income eligible.
- Mixed-use developments can incorporate work spaces and commercial opportunities.
- Can spark economic revitalization in previously underserved areas.

Where has it worked?

Artist housing has been developed successfully across the country by private, public, and non-profit developers using a variety of funds, including federal, state, and local housing credits, philanthropist donations, and private investment. One of the pioneers for this type of project has been Artspace, a Minnesota-based national non-profit real-estate developer for the arts that has used LIHTC, local tax credits, funds from municipal redevelopment authorities, and private and philanthropic entities to build artist housing since the 1980s. Artspace has built more than 35 artist housing projects in 19 states and Washington, DC. In Minnesota, Nevada, and Washington, DC, artist housing has produced clear benefits for the artist tenants, as well as the surrounding neighborhood and greater region: artists benefited from affordable housing, greater networking, and collaboration; community members viewed artist housing as an enhancement of the existing neighborhood, surrounding properties were revitalized; and areas with artist housing saw an upsurge in businesses and clients.⁶⁷

- New Orleans’ 5 Year Housing Plan pledges to build or preserve 7,500 affordable housing units, including “workforce housing” units for “service workers, artists, and culture bearers.” The first project, Bell Artspace Campus, uses \$37 million in LIHTC, philanthropic funds, and city subsidies for an adaptive reuse development of affordable artist housing and artist-driven non-profits.
- New York City’s affordable housing plan makes artist housing one of its main priorities. The City intends to develop 150 live/work units for artists every year through 2024 with \$3

⁶⁶ Housing and Economic Recovery Act of 2008. 110th Congress. 2008. <https://www.gpo.gov/fdsys/pkg/PLAW-110publ289/pdf/PLAW-110publ289.pdf>

⁶⁷ How Artist Space Matters: Impacts and Insights from Three Case Studies drawn from Artspace Projects’ Earliest Developments. Metris Arts Consulting. March 2010. <https://www.giarts.org/sites/default/files/How-Artist-Space-Matters.pdf>

How Art Spaces Matter II: The Riverside, Tashiro Kaplan and Insight from five Artspace Case Studies and Four Cities. July 2011. https://metrisarts.com/wp-content/uploads/2012/06/1-HowArtSpacesMatter_II.pdf

million in annual funds from New York City's Department of Cultural Affairs and matching funds from private donors.⁶⁸

- In Los Angeles, the City Council has proposed an affordable housing program for those in the creative arts. However, the proposal has received pushback from Fair Housing advocates and others who believe LIHTC credits should be allocated to other populations.⁶⁹ A new housing development in the city's Arts District will include units for tenants with very low incomes, with leasing preference for artists.⁷⁰
- In San Francisco, the SF Arts Commission is working on a plan to designate some affordable housing units for artists via the city's affordable housing lottery. The Arts Commission is first undertaking an artist demographic survey to demonstrate that artists should have preference, a step that previously allowed teachers to earn a low-cost housing preference in the city's affordable housing lottery.⁷¹
- Colorado's Space to Create program is the first state-driven initiative for affordable housing for artisans and creative entrepreneurs in the nation. The program will develop affordable housing and work space through \$45 million in direct capital investment by multiple state agencies and partners.⁷²

Key considerations

- In Minneapolis and Saint Paul, affordable artist housing has been found to house primarily white residents despite the demographics of the greater population. In addition, artist housing had rents above affordable housing limits, and was built in more affluent areas with better amenities and architectural finishes than lower-cost housing in racially segregated or diverse neighborhoods.⁷³
- Critics argue against using LIHTC credits to subsidize artists that may not face as great housing need as other low-income households.⁷⁴
- Artists may not keep standard financial files, rely on the cash economy, and may have higher levels of bad credit and outstanding debts that may make mean they have difficulty qualifying for affordable housing. In New Orleans, Habitat for Humanity used earmarked funds from donors to help musicians pay off outstanding debts and found alternative ways to establish artists' ability to pay rent.⁷⁵
- The needed amenities and architectural design of artist housing may differ from general housing (utility sinks, soundproof rooms, gallery spaces), especially if work space is included.⁷⁶

⁶⁸ *State of the City: Mayor de Blasio Puts Affordable Housing at Center of 2015 Agenda to Fight Inequality*. NYC. Feb. 3, 2015. <http://www1.nyc.gov/office-of-the-mayor/news/088-15/state-the-city-mayor-de-blasio-puts-affordable-housing-center-2015-agenda-fight/#/0>

⁶⁹ Hoberman, Natalie. *LA councilmen push for subsidized artists' housing*. *The Real Deal*. Dec. 05, 2017. <https://therealdeal.com/la/2017/12/05/la-councilmen-push-for-subsidized-artists-housing/>

⁷⁰ *Affordable Artist Housing*. Los Angeles Downtown Arts District Space. <http://ladadspace.org/affordable-artist-housing/>

⁷¹ Veltman, Chloe. *San Francisco Looks to Create Low-Cost Housing Preference for Artists*. *KQED*. April 4, 2018. <https://www.kqed.org/arts/13828581/san-francisco-looks-to-create-low-cost-housing-preference-for-artists>

⁷² *Space to Create Colorado*. Colorado Creative Industries. https://coloradocreativeindustries.org/wp-content/uploads/2018/03/space-to-create_013018.pdf

⁷³ *The Rise of White-Segregated Subsidized Housing*. Institute on Metropolitan Opportunity, University of Minnesota Law School. May 2016. <https://www.law.umn.edu/sites/law.umn.edu/files/metro-files/imo-white-segregated-subsidized-housing-5-18-2016.pdf>

⁷⁴ Semuels, Alana. *The Artist Loft: Affordable Housing (for White People)*. *The Atlantic*. May 19, 2016. <https://www.theatlantic.com/business/archive/2016/05/affordable-housing-for-white-people/483444/>

⁷⁵ Reckdahl, Katy. *Keeping Your Artists Close to Home*. *Shelterforce*. Jan. 11, 2017. <https://shelterforce.org/2017/01/11/keeping-your-artists-close-to-home/>

⁷⁶ *The Global Grid. Making a Place for Artists in New Orleans*. *Smart Cities Dive*. <https://www.smartcitiesdive.com/ex/sustainablecitiescollective/making-place-artists-new-orleans/120166/>

- Development of artist housing relies primarily on LIHTC, historic tax credits, cultural facility grants, and philanthropic gifts. Experience shows that perhaps non-profits can more readily be able to access the public funding sources that provide enough subsidy to create affordable artist housing.⁷⁷

Resources

- <http://www.artspace.org/>
- <https://www.ellismarsaliscenter.org/musicians-village>
- https://www.huduser.gov/portal/pdredge/pdr_edge_inpractice_021012.html
- <http://www.lincnet.net/sites/linc//images/3814/Developing%20Affordable%20Space%20for%20Artists.pdf>
- <https://www.urban.org/sites/default/files/publication/31226/1001176-Artist-Space-Development-Making-the-Case.PDF>
- <https://coloradocreativeindustries.org/opportunities/space-to-create/>

Strategy: Cultural District Preservation

Overview

Districts focus on retaining culturally-relevant businesses and residents through affordable housing, business support, and increased funding for cultural programs and neighborhood improvements.

What does it do?

Overlays temporary or permanent Cultural District Preservation designation in an existing area or neighborhood that has a high concentration of cultural resources and activities in order to increase these and protect against displacement. Unlike name-only designations that come without incentives, a Cultural District Preservation designation comes with financial and technical support.

Key Benefits

- Targets specific neighborhoods that may be at risk of gentrification and displacement of residents and businesses.
- Comes with funds and technical assistance for designated districts.
- Increases economic development and revitalization for long-term residents.

Where has it worked?

In 2015, the Governor of California approved Assembly Bill No. 189, which requires the state's Arts Council to establish criteria and guidelines for state-designated cultural districts. Districts are chosen through a competitive application system for certification, including an open call for initial letters of intent, a peer panel review, site visits for semi-finalists, and an invited finalist application.⁷⁸ Designation is accompanied by technical assistance, peer-to-peer exchanges, branding materials,

⁷⁷ *Developing Affordable Space for Artists: A Summary of Development Projects Funded by the Local Initiatives Support Corporation.* Community Partners Consultants, Inc., Local Initiatives Support Corporation, The Urban Institute. 2004. <http://www.lincnet.net/sites/linc//images/3814/Developing%20Affordable%20Space%20for%20Artists.pdf>

⁷⁸ 14 California Cultural Districts Announced in New Creative Statewide Program. California Cultural Districts. July 13, 2017. <https://www.caculturaldistricts.org/announcement/>

and promotional strategies to leverage existing artistic and cultural assets within a community.⁷⁹ Cultural Districts are created with the intention of helping to grow and sustain arts and cultural opportunities, increase community participation in arts and culture, promote socioeconomic and ethnic diversity, and prevent artist displacement.

Independent from the above, the Board of Supervisors from the City of San Francisco introduced legislation to establish specially protected cultural districts in the city to slow gentrification in neighborhoods with particular historic significance to a demographic. Unlike prior designations, Ordinance No. 126-18 strictly defines a cultural district as a neighborhood that:

“Embodies a unique cultural heritage because it contains a concentration of cultural and historic assets or culturally significant enterprise, arts, services, or businesses, or because a significant portion of its residents or people who spend time in the area or location are members of a specific cultural, community, or ethnic group.”⁸⁰

The designation is accompanied by funding from the City, philanthropic donations to a district-specific fund, special zoning to slow redevelopment of historic businesses (such as limiting façade changes and building buyouts), and increased funding for community engagement in development processes.⁸¹

Key considerations

- The designation should be accompanied by resources, including but not limited to funds, technical assistance, and promotional strategies. Municipalities interested in such designations should ensure there are enough resources available to support the designation.
- Zoning and design guidelines can be used to prevent land use and physical changes to the cultural district. Delaying demolitions, preventing façade alterations, and requiring special permission for merging storefronts over a certain size.
- The designation should include funds or incentives for affordable housing production and preservation to ensure ongoing affordability in the district.

Resources

- <https://www.caculturaldistricts.org/>
- <https://www.arts.gov/sites/default/files/Research-Art-Works-GeorgiaTech.pdf>
- <http://createquity.com/2014/06/whats-next-for-state-designated-cultural-districts/>

⁷⁹ Legislative Counsel’s Digest. Assembly Bill No. 189. California Legislative Information. Oct. 01, 2015. https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201520160AB189

⁸⁰ Board of Supervisors. Ordinance No. 126-18. City and County of San Francisco. May 22, 2018. <https://sfbos.org/sites/default/files/o0126-18.pdf>

Brinklow, Adam. New legislation aims to halt gentrification in San Francisco enclaves. Curbed San Francisco. Oct. 25, 2017. <https://www.sfchronicle.com/bayarea/article/SF-cultural-districts-gain-footing-in-preserving-12929662.php>

⁸¹ Fracassa, Dominic. SF cultural districts gain footing in preserving neighborhoods’ heritage. San Francisco Chronicle. May 20, 2018. <https://www.sfchronicle.com/bayarea/article/SF-cultural-districts-gain-footing-in-preserving-12929662.php>

Wenus, Laura. Supervisor hopes to craft clear path for new cultural districts. Mission Local. Oct. 25, 2017. <https://missionlocal.org/2017/10/supervisor-hopes-to-craft-clear-path-for-new-cultural-districts/>

Strategy: Artist Housing Task Force

Overview

A multidisciplinary Task Force consisting of artists, representatives from arts organizations, market and affordable real estate developers, technical experts, and municipal staff, convened to study and vet strategies to create and preserve affordable housing and workspaces for artists.

What does it do?

Proposes and advocates for local policy and program recommendations to help artists remain in a neighborhood or city.

Key Benefits

- Gathers local stakeholders with key insights about the community.
- Identifies innovative ideas and tools for housing production and preservation.
- Community-driven process.

Where has it worked?

In 2015, the City of Oakland created a special Mayor's task force to propose policy recommendations to help artists remain in Oakland. The Task Force conducted a survey of Oakland's artists to better understand issues facing them. Survey results highlighted challenges with finding housing and workspaces that are affordable, safe, and offered long-term leases. Following survey analysis, the task force studied and vetted a wide range of strategies to create and preserve affordable housing and workspaces in the city, guided by principles of artist permanency, equity, and cultural preservation. Following a series of working sessions and analysis, the task force presented three main strategies, including property acquisition for permanently affordable art spaces, financial assistance for artists to avoid or cope with displacement, and technical assistance to support and help artist's businesses.⁸² The City is now in the process of implementing these strategies with a \$1.7 million fund already established for real estate acquisition.⁸³

Following the Ghost Ship fire in Oakland in 2016 and safety concerns in the local Bell Foundry art space, the City of Baltimore established the Mayor's Task Force on Safe Arts Space in 2017 to create a citywide network of safe, cost-effective, living, live/work, studio, and performance spaces for artists. The task force created three workgroups for artist's space needs, code and regulatory issues, and project development and finance. Among the recommendations were increased City support for artists, technical assistance for code compliance and safety, linking artists with available spaces, code amendments for live/work spaces, development of City- and privately-owned property, funding for art space creation and preservation, and enhancement of existing arts and entertainment districts.⁸⁴

Key considerations

⁸² Artist Housing and Workspace Task Force. *Top Three Strategies to Stem Artist Displacement*. City of Oakland. <http://www2.oaklandnet.com/oakca1/groups/ceda/documents/agenda/oak057556.pdf>

⁸³ \$1.7 Million Investment To Help Create Safe + Affordable Space for Oakland's Arts Community. Kenneth Rainin Foundation. Dec. 5, 2016. <https://krfoundation.org/investment-to-create-safe-affordable-space-oakland-arts/>

⁸⁴ Mayor's Task Force on Safe Arts Space. *Report of the Mayor's Task Force on Safe Arts Space*. City of Baltimore. Dec. 20, 2017. https://www.baltimorecity.gov/sites/default/files/Final_Report_SASTF_12.18.2017.pdf

- The task force should consist of artists, arts organizations, developers, City staff, and other stakeholders that have the experience and connections to facilitate discussion and strategy implementation.
- Strategies identified by the task force must be clear and include a path for implementation.
- The task force should be part of a greater strategy to create and preserve affordable artist housing and workspaces.

Resources

- <http://www2.oaklandnet.com/oakca1/groups/ceda/documents/agenda/oak062138.pdf>
- https://www.baltimorecity.gov/sites/default/files/Final_Report_SASTF_12.18.2017.pdf
- <https://static1.squarespace.com/static/55b90b8de4b060a0d84fcbd0/t/55cbc7bfe4b00ee28e95e188/1439418303974/Oakland+311+Report.pdf>

Strategy: Artist Affordable Housing Fund

Overview

A set-aside fund for the preservation and creation of artist housing, as well as technical assistance for artists facing displacement.

What does it do?

Creates a fund of private and public contributions earmarked for artist housing to prevent displacement and increase long-term support for artists within the community.

Key Benefits

- Leverages public and private funding to tackle artist housing and workspace challenges.
- As an alternative to project-based funds, an artist affordable housing fund provides funding for an array of projects.
- Earmarked for artists and arts organizations.
- Flexible funds can be used to increase technical assistance for artists facing displacement or unsafe living situations.

Where has it worked?

Following recommendations from the Artist Housing and Workforce Taskforce, the City of Oakland announced the Community Arts Stabilization Trust (CAST), a \$1.7 million fund to support sustainable, long-term solutions to create affordable, safe spaces for artists and arts organizations. The funds will be used for a new financial and technical assistance program to help arts organizations facing displacement, as well as to initiate a real estate acquisition program for affordable art spaces. CAST will offer grants up to \$75,000 to arts organizations that have been displaced or are facing displacement. In addition, CAST is partnering with the Northern California Community Loan Fund (NCCLF), a local nonprofit, to offer technical real estate assistance.⁸⁵

The New York-based national nonprofit Actors Fund uses private and philanthropic funds to develop and preserve affordable housing for artists, sponsor seminars and information on housing

⁸⁵ \$1.7 Million Investment To Help Create Safe + Affordable Space for Oakland's Arts Community. Kenneth Rainin Foundation. Dec. 5, 2016. <https://krfoundation.org/investment-to-create-safe-affordable-space-oakland-arts/>

opportunities and tenants' rights and maintain a housing bulletin board. The Actors Fund Housing Development Corporation has 558 units in its portfolio, with additional units through partnerships with other non-profit organizations and local government.⁸⁶

In Austin, the City Council adopted Resolution No. 20160303-019 in 2016, which makes recommendations on the Music and Creative Ecosystem. Among the recommendations adopted, the Council decided to develop a Cultural Land Trust/Strike Fund and implement other methods to leverage public-sector funding for public-private purchase and preservation of culturally significant properties to be used for the development of affordable residential creative spaces.⁸⁷

Key considerations

- Funds for artist housing shouldn't come at the expense of decreased funding for existing affordable housing programs.
- The fund should explicitly define what projects and programs can access funding.

Resources

- <https://www.ncclf.org/>
- <http://cast-sf.org/>
- <https://www.urban.org/sites/default/files/publication/31221/1001175-Artist-Space-Development-Financing.PDF>
- <https://actorsfund.org/>

Strategy: Tenant Legal Aid Fund

Overview

Fund for tenants seeking counsel in eviction cases.

What does it do?

The legal aid fund for households at risk of eviction offers funding to provide legal representation for tenants, which has shown to improve housing stability.

Key Benefits

- Can prevent displacement of renter households through legal counsel.
- Lowers costs associated with displacement and homelessness for municipalities.

Where has it worked?

In 2014, New York City committed to increase legal aid spending by \$93 million over five years. Just two years later, evictions in the city had dropped to their lowest rates in over a decade. Evictions declined by 18% between 2014 and 2016, while the number of cases filed by landlords for non-

⁸⁶ Housing Development Corporation. Actors Fund. <https://actorsfund.org/housing-development-corporation>

⁸⁷ Arts Commission. Recommendation Number: 20160815-6.a.i: Arts Commission Recommendations on the Music and Creative Ecosystem Stabilization Recommendations. Austin City Council. 2016. <http://www.austintexas.gov/edims/document.cfm?id=261602>

payment of rent decreased by 2%.⁸⁸ A cost/benefit analysis also showed that while the right to counsel would cost the City around \$200 million a year, it would net nearly \$320 million in savings from the cost of housing displaced families in homeless shelters, preserving rent-controlled affordable housing, and the costs associated with unsheltered homelessness.⁸⁹

Baltimore residents will be voting in November 2018 on a referendum to establish a tenant's legal assistance fund. Funding would come from a variety of sources, and be dedicated exclusively to legal counsel for low-income tenants facing evictions proceedings and efforts to educate tenants about their legal rights.⁹⁰

Philadelphia is considering creating legislation guaranteeing the right to counsel to deter evictions in the city.⁹¹

Key considerations

- Can require new legislation at the municipal level prior to implementation.
- Requires ongoing funding sources.

Resources

- <https://www.righttocounselnyc.org/>
- <https://www1.nyc.gov/site/hra/help/legal-assistance.page>
- <http://www.bostonbar.org/docs/default-document-library/bba-crtc-final-3-1-12.pdf>

Strategy: Tenant Right to Counsel

Overview

Supports free, universal access to lawyers for tenants in housing court who earn up to 200% above the poverty line.

What does it do?

- Guarantees every household under a certain income the right to counsel regardless of ability to pay.
- Key Benefits
- Can prevent displacement of renter households through legal counsel.
- Lowers costs associated with displacement and homelessness for municipalities.

Where has it worked?

⁸⁸ Navarro, Mireya. Evictions Are Down by 18%; New York City Cites Increased Legal Services. *The New York Times*. Feb. 29, 2016. <https://www.nytimes.com/2016/03/01/nyregion/evictions-are-down-by-18-new-york-city-cites-increased-legal-services.html>

⁸⁹ Stephens, Alexis. Can Other U.S. Cities Follow in NYC's Footsteps to Help Renters? *Next City*. Feb. 21, 2017. <https://nextcity.org/daily/entry/can-other-cities-follow-nyc-footsteps-help-renters-right-to-counsel>

⁹⁰ Brey, Jared. Baltimore May Join Cities Supporting Low-Income Tenants in Eviction Cases. *Next City*. July 21, 2017. <https://nextcity.org/daily/entry/baltimore-bill-low-income-tenants-lawyers-eviction-cases>

⁹¹ Stephens, Alexis. Can Other U.S. Cities Follow in NYC's Footsteps to Help Renters? *Next City*. Feb. 21, 2017. <https://nextcity.org/daily/entry/can-other-cities-follow-nyc-footsteps-help-renters-right-to-counsel>

In 2017, New York City became the first city in the nation to guarantee free access to legal counsel to tenants in eviction proceedings who earn up to 200% above the poverty line. This commitment follows a pilot started in 2014 that greatly increased funding to legal services for tenants. Evictions decreased by 5% in the city in 2017, part of a 27% decline since 2013. New York City's annual funding for legal services for tenants will increase to \$155 million by 2022, when the policy is fully implemented, but officials expect it will save the City twice that amount in costs related to homelessness.⁹²

Washington, DC, approved a \$4.5-million pilot program in 2017 to provide free legal counsel to tenants in evictions proceedings making up to 200% above the federal poverty level. The program is administered by the D.C. Bar Foundation.⁹³

Key considerations

Can require new legislation at the state level prior to implementation.

Resources

- <https://www.righttocounselnyc.org/>
- <http://civilrighttocounsel.org/>

Strategy: Right to Return

Overview

Provides preference to households that have been displaced from subsidized rental or homeownership housing units.

What does it do?

Cities and towns can use preference or points to prioritize certain types of households for subsidized affordable rental housing and homeownership opportunities. Communities can use preference policies to specifically target housing opportunities to individuals and families that have been displaced through market-driven gentrification and/or past government policy, such as urban renewal.

Key Benefits

- Ensures previously displaced households can return to their neighborhoods.
- Ensures long-term housing affordability.

Where has it worked?

In Portland, OR, preference for affordable housing or down payment assistance opportunities is given

⁹² Capps, Kriston. *New York City Guarantees a Lawyer to Every Resident Facing Eviction*. CityLab. Aug. 14, 2017. <https://www.citylab.com/equity/2017/08/nyc-ensures- eviction-lawyer-for-every-tenant/536508/>

Right to Counsel – A victory for Tenants! New York City Council. July 20, 2017.

<https://council.nyc.gov/news/2017/07/20/right-to-counsel-a-victory-for-tenants/>

⁹³ Austerhuhle, Martin. *Need A Lawyer To Fight An Eviction? A New D.C. Program Provides One For Free*. WAMU 88.5. May 18, 2017. <https://wamu.org/story/17/05/18/need-lawyer-fight- eviction-new-d-c-program-provide-one-free/>

to applicants who were displaced, are at risk of displacement, or who are the descendants of families that were displaced due to urban renewal in N/NE Portland. The policy is referred to as Right to Return because it has facilitated the return of several long-displaced residents to the neighborhood.

Applicants can receive up to six preference points based on their (or their parent/guardian or grandparent) current or past residence. Preference is based on the amount of urban renewal activity that will or has occurred and whether applicants were displaced or are at risk of displacement.⁹⁴

Key considerations

- Preference policies should not conflict with Fair Housing rules.
- Local preference may entrench segregation by preserving neighborhood racial makeup, or by limiting increased diversity in socioeconomically homogenous communities.

Resources

<https://www.portlandoregon.gov/phb/74540>

Strategy: Preference for Affordable Housing

Overview

Preference for available deed-restricted subsidized housing units to individuals vulnerable to displacement.

What does it do?

Cities and towns can give preference to households at risk of displacement for new affordable housing. This prevents households at risk of displacement from leaving the neighborhood or the municipality.

Key Benefits

- Prevents displacement of at-risk households.
- Ensures long-term affordable housing.

Where has it worked?

In 2015, San Francisco, CA, adopted a Neighborhood Resident Housing Preference that sets aside 40% of units in City-funded affordable housing developments for current residents of the Western Addition, a historically black neighborhood experiencing gentrification. HUD challenged the policy claiming it violated Fair Housing protections of equal access to affordable housing.⁹⁵ San Francisco and HUD reached an agreement in 2016 that allowed the City to give preference to some residents

⁹⁴ Portland Housing Bureau. *Application for Preference*. City of Portland, Oregon.
<https://www.portlandoregon.gov/phb/74540>

⁹⁵ Grabar, Henry. *Obama Administration to San Francisco: Your Anti-Gentrification Plan Promotes Segregation*. Slate. Aug. 17, 2016.
http://www.slate.com/blogs/moneybox/2016/08/17/a_local_preference_affordable_housing_plan_in_san_francisco_might_violate.html

based on where they lived.⁹⁶ Instead of setting aside units just for residents of the immediate neighborhood, units would go to residents of any neighborhood facing extreme displacement pressure.

Key considerations

- Preference policies should not conflict with Fair Housing rules.
- Local preference may entrench segregation by preserving neighborhood racial makeup, or by limiting increased diversity in socioeconomically homogenous communities.

Resources

- <http://furmancenter.org/research/iri/discussions/community-preferences-and-fair-housing>
- <http://sfmohcd.org/lottery-preference-programs>
- <https://www.lewis.ucla.edu/can-tool-segregation-used-fight-displacement-delicate-balance-residential-preference-policies/>

⁹⁶ HUD agrees to offer residents in areas with high displacement priority in federal housing. The San Francisco Chronicle. Sept. 23, 2016. <https://www.sfchronicle.com/opinion/editorials/article/HUD-is-right-to-allow-SF-try-a-neighborhood-9242954.php>



APPENDICES

APPENDICES

APPENDIX A: CASE EXAMPLES OF ARTS DISTRICTS WITH THEATRES AS ANCHOR INSTITUTIONS

Cultural Planning Case Studies
Former Strand Theatre - BRIC House
www.bricartsmedia.org
Brooklyn, New York



The BRIC House is an example of a large-scale renovation project yielding an interdisciplinary public arts hub in a downtown area. BRIC has the unique advantage of being a public access television provider, which generates a consistent funding stream for the organization. The building is much larger than The Strand in Upham's Corner and illustrates how different arts uses can co-locate. The upper floor of the building is inhabited by a separate, non-profit cooperative glass blowing studio.

Facility Information

Year Constructed/Redeveloped: 2011

Total Facility Size: 90,000 square feet

Facility Capacity: Art exhibition space (cap 75); two performance spaces (cap 440 and 175); Glass TV Studio; video and audio editing facilities; Café

Housing: No

Connection with Transit: BRIC is located at the nexus of several subway lines and bus routes, making it easily accessible.

Programming

Designated Arts and Culture District: Yes

Programmatic Focus: Audio and visual media, community education

Program Development: Prior to redevelopment of the Strand Theatre, the three components of BRIC - Brooklyn Access TV, the Celebrate Brooklyn event series, and a Contemporary Arts Exhibition space - operated in separate venues. Integrating those uses has allowed for the development of multi arts programming within the BRIC House.

Area Revitalization

The former Strand Theatre was a city-owned property that had been the focus of several economic development strategies. When the City began to re-envision downtown Brooklyn as a 24/7 district, they engaged with BRIC as a partner to create a new arts hub. Arts programming in Downtown Brooklyn ensures street activity in the evenings and weekends that support a host of other economic activities.

Operations and Financials

Operator: Non-profit

Operator Structure: Producer, Presenter

Financing: Public/Private/Foundation

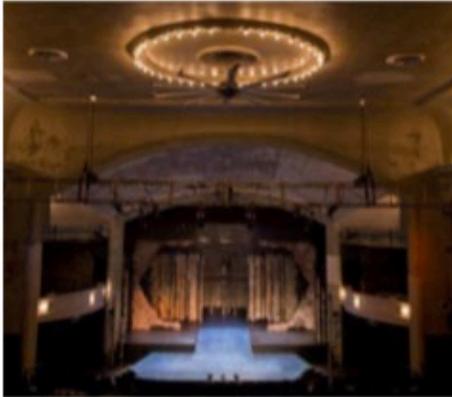
Most Recently Available Annual Budget: \$14 million

Cost of Redevelopment: \$41 million

Financing Program: BRIC has been the contractor for Brooklyn Public Television for the past 30 years - equivalent to Boston Neighborhood Network. Consistent funding from cable companies (required to pay BRIC a stipend / subscriber) is recorded as program revenue, skewing 990 forms. BRIC raises about \$5.4M annually to support programs and activities. Almost all of BRIC's programs are free.

.....
Sources: 12.14.17 interview with Leslie Schultz, president of BRIC Media; *Beyond the White Box: Creating Innovative Art Spaces that Transform People and Places*, Julia Chan (2005); www.guidestar.org; www.bricartsmedia.org.

Cultural Planning Case Studies
Cleveland Public Theatre
 www.cptonline.org
 Cleveland, Ohio



Contextually, the Cleveland Public Theatre (CPT) is the case study most relatable to Upham's Corner. The Gordon Square area of Cleveland and Upham's Corner have both experienced historical disinvestment and recent revitalization. The Gordon Square Theatre is owned and operated by a 501c3 theatre company. Operations illustrate a more do-it-yourself development scheme as opposed to large-scale public or private projects.

Operations and Financials

Operator: Non-profit

Operator Structure: In House Operator

Financing: Public/Private/Foundation

Most Recently Available Annual Budget: \$3 million

Cost of Redevelopment: \$60k initial investment, purchased property from the city. Investment culminated in a \$30m joint fundraising effort by local CDC, CPT, and other arts organizations to pay for building renovations and street scape improvements.

Financing Program: CPT receives most of its funding through donations and grants. It holds a contract with the Cleveland Public Housing Authority and receives some funding from the city through Community Development Block Grants for youth programming. Most charitable donations support CPT's long-term community programs such as Brick City.

Sources: 12.14.17 interview with Matt Segell, Business Coordinator at CPT; Beyond the White Box: Creating Innovative Art Spaces that Transform People and Places, Julia Chan (2005); www.guidestar.org; www.cptonline.org

Facility Information

Year Constructed/Redeveloped: 1994

Total Facility Size: 35,000 square feet

Facility Capacity: 250 seat theatre at Gordon Square; 100 seat venue in small church; 80 seat multi-use space in storefront

Housing: No

Connection with Transit: CPT is on a bus route and is 1/2 mile from a metro station. However, most patrons drive to the theatre.

Programming

Designated Arts and Culture District: Yes

Programmatic Focus: Theatre

Program Development: In addition to in-house productions, CPT supports Director, Playwright, and Composer fellowships for emerging artists. CPT also works with 600 underprivileged youth and adults annually to enhance academic achievement and teach job skills, compassion, mindfulness, and community pride.

Area Revitalization

CPT founded Gordon Square Arts District and - through a collaboration with local politicians and stakeholders - was able to realize neighborhood transformation. A long-term joint fundraising campaign between Detroit Shoreway Community Development Corporation and CPT was a decisive factor in transforming the area. There have been several master plans for the Detroit Shoreway neighborhood; all have involved a strong community engagement process.

Cultural Planning Case Studies

Schermerhorn House

www.breakingground.org/our-buildings/the-schermerhorn/

Brooklyn, New York



The Schermerhorn House is a unique example of integrating housing and arts uses. The building's apartments provide supportive housing for the performing arts community in partnership with the Actors Fund. The ground floor is deed-restricted for arts uses and is currently leased to the Brooklyn Ballet School. The building also includes a publically available performance space.

Operations and Financials

Operator: Private / Non-profit

Arts Operator: Non-profit

Arts Operator Structure: In House Operator, Private Rental House

Financing: Public/Private/Foundation

Cost of Redevelopment: \$59 million

Financing Program: The development team was composed of a partnership between Common Ground (non-profit) and Hamlin / Time Equities (private development firm). The joint development proposal leveraged the private sector's ability to attract investment and support, debt and the non-profit sectors ability to leverage affordable housing tax credits and non traditional financing. NYC Housing Preservation and Development provided a Supportive Housing Loan in the amount of \$19.8 million and the New York City Housing Development Corporation provided \$30 million in tax-exempt bond financing over the course of the construction period. Mizuho Corporate Bank provided predevelopment financing. JP Morgan Chase provided the construction letter of credit. The NYS Homeless Housing and Assistance Program provided capital financing of \$6.7 million.

Sources: *Beyond the White Box: Creating Innovative Art Spaces that Transform People and Places*, Julia Chan (2005); www.guidestar.org; <http://www.breakingground.org/our-buildings/the-schermerhorn/#.Wfou5FISyUk>

Facility Information

Year Constructed/Redeveloped: 2009

Total Facility Size: 141,000 square feet

Facility Capacity: 1,200 square foot dance studio; Black Box Theatre (cap 199) available to residents and community members

Housing: 116 units dedicated for workers in the performing arts who were formerly homeless or with special needs; 100 units dedicated for low income residents of local community boards.

Connection with Transit: The Schermerhorn House is located on top of several trains and is also accessible via three bus routes.

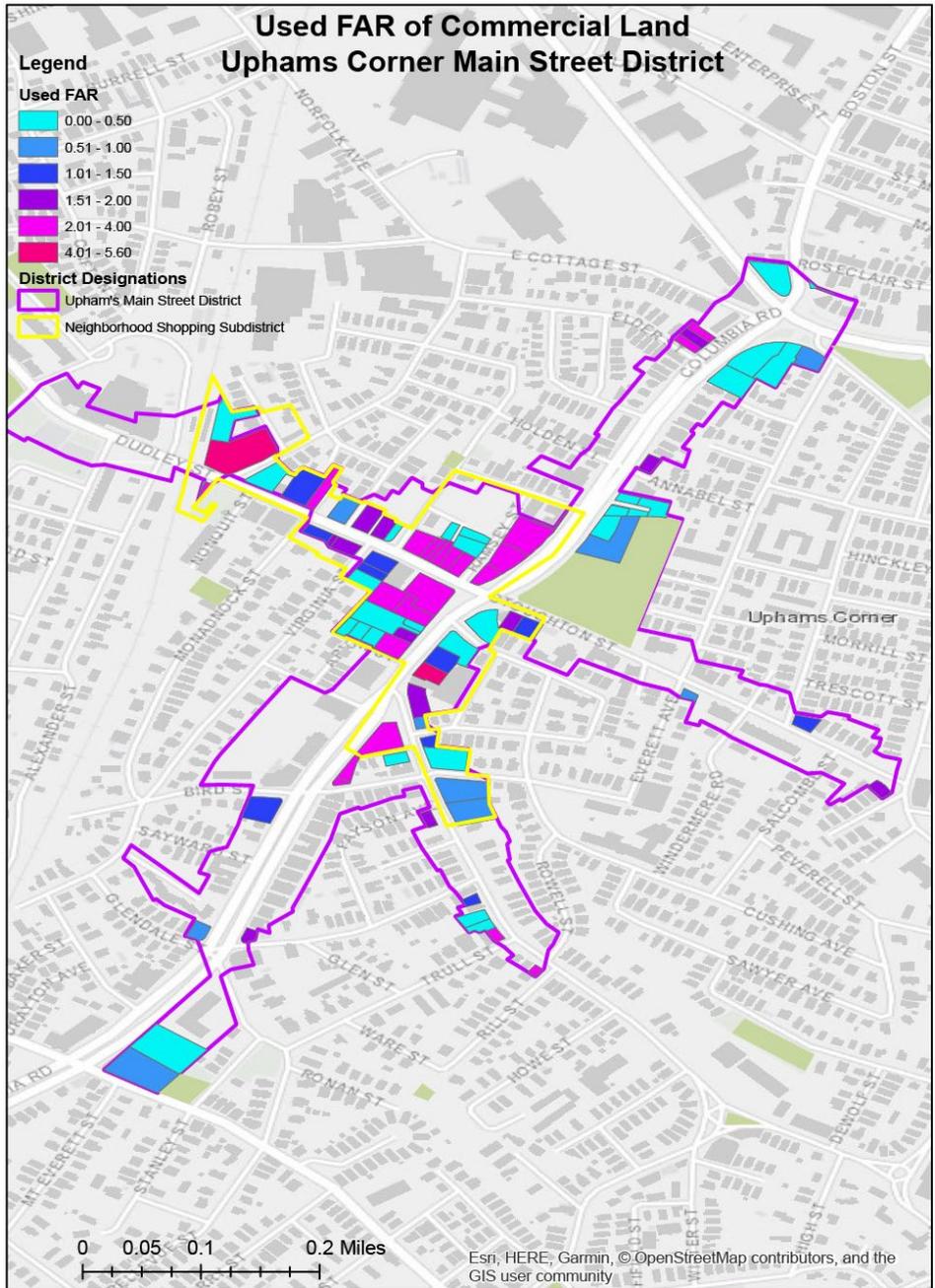
Building Development History: The property was released by the State of NY through an RFP that included a provision mandating the inclusion of 30% of residential units as affordable and a stated goal to knit the community together. To meet those criteria and market conditions, the development team focused on providing supportive housing for the arts community in conjunction with a deed-restricted ground floor dedicated to the arts.

Area Revitalization

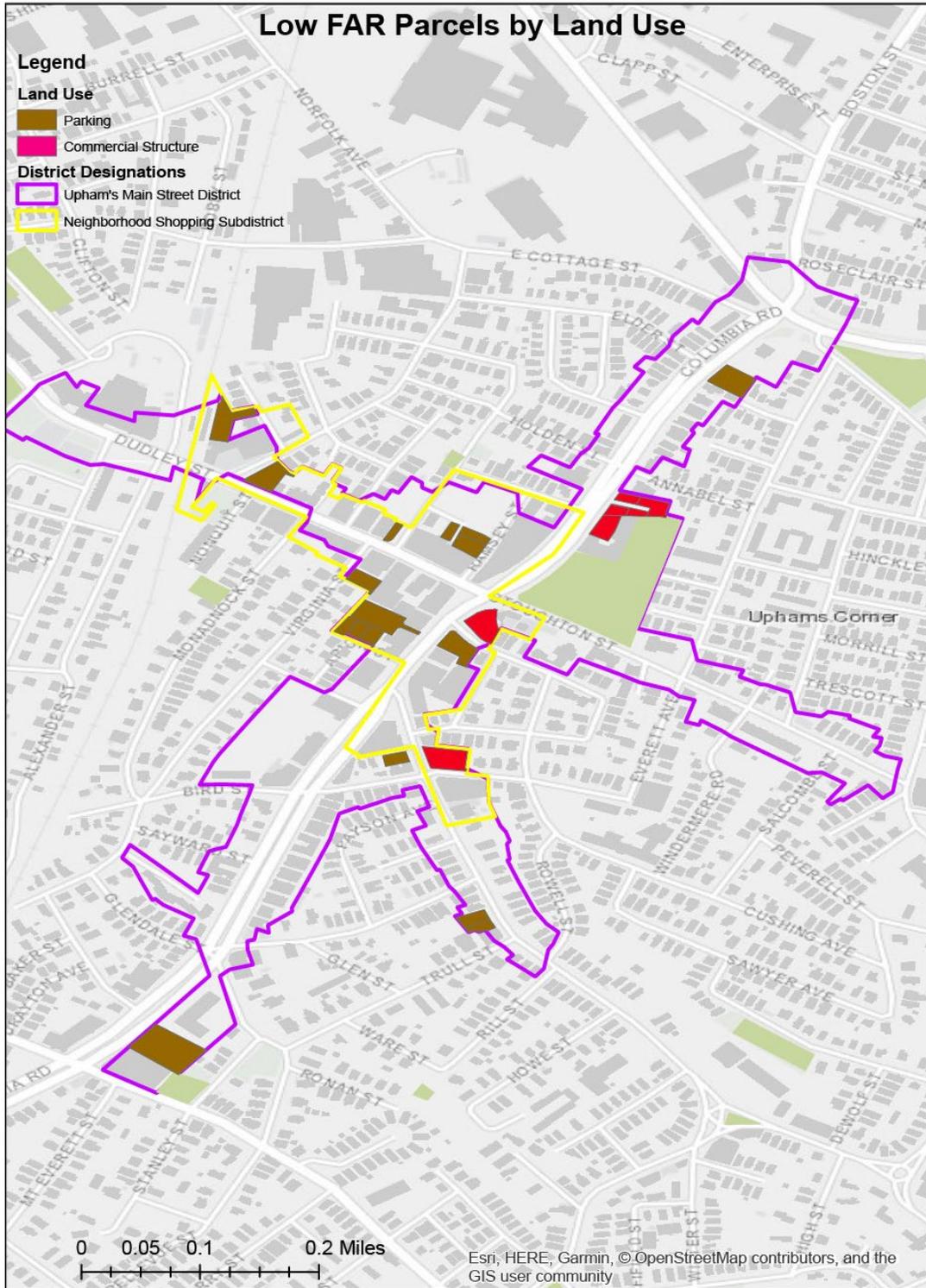
In 1998, the Borough President convened a task force that was composed of seven community groups, including business associations, neighborhood coalitions, community boards, and street associations, to develop a vision for Schermerhorn Street and the several vacant lots and parking lots that were then being considered for development. The groups came up with site requirements including streetscape improvements, height restrictions, and a general need for development to accommodate adjacent neighborhood character and knit the communities together.

APPENDIX B: MITIGATING COMMERCIAL DISPLACEMENT

USED FAR IN UPHAM'S CORNER



LOW FAR PARCELS BY LAND USE



EXISTING CONDITIONS AT 734 DUDLEY ST



PROPOSED DEVELOPMENT AT 734 DUDLEY



BUSINESS SURVEY

As the City of Boston prepares to survey businesses in Upham's corner the following questions may assist in understanding the local commercial market as well as identifying strategies that could be used in mitigating impending impacts of displacement. In addition to evaluating the risk of displacement, the business survey should be used to inform the measures that the City can take to ensure that new commercial development coming online in Upham's Corner is tailored to meet the community's needs.

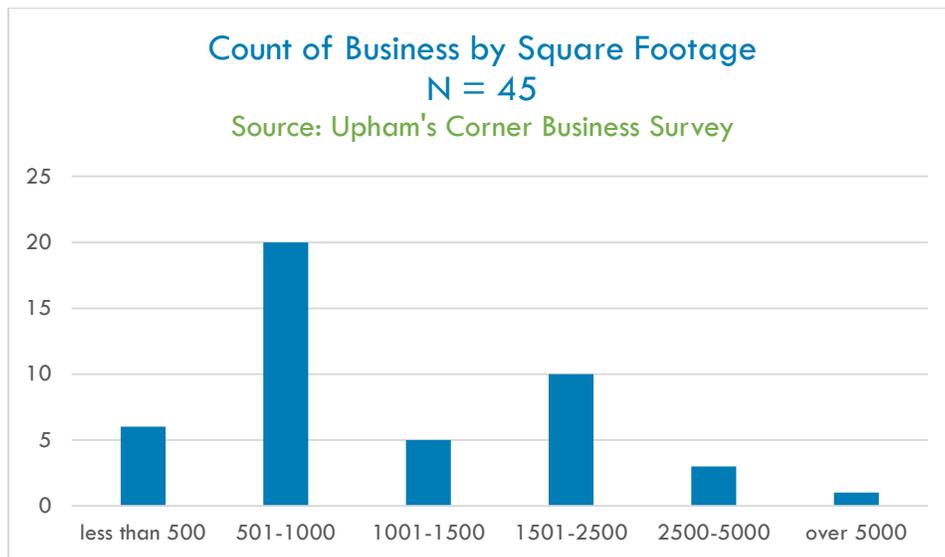
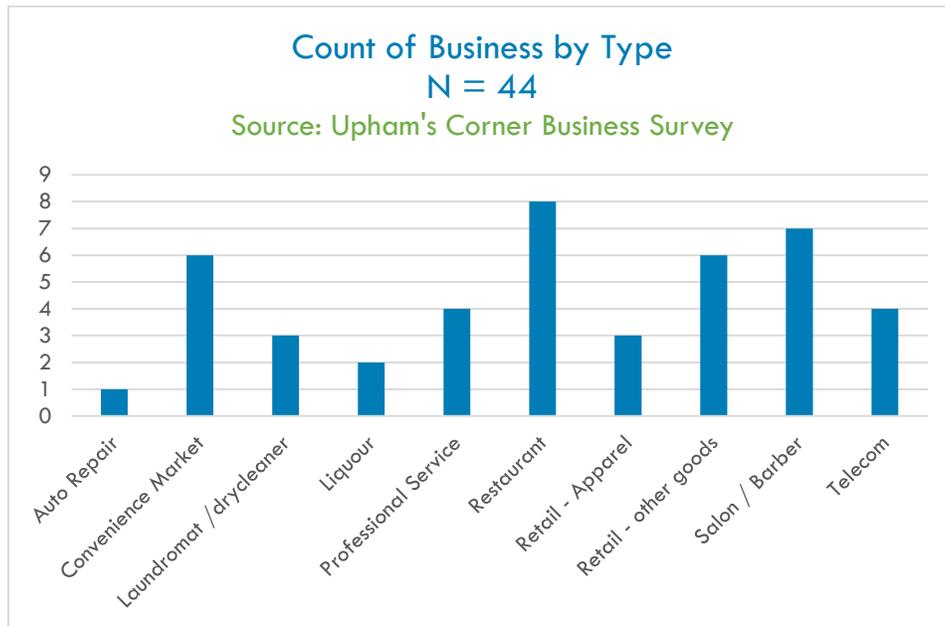
The following survey questions are intended for the traditional retail and service-oriented businesses currently occupying space within the Upham's Corner neighborhood shopping district. The City should also consider developing an accompanying survey for the businesses growing within the Fairmont Innovation Lab to assess a new kind of potential future demand for commercial real estate in the area.

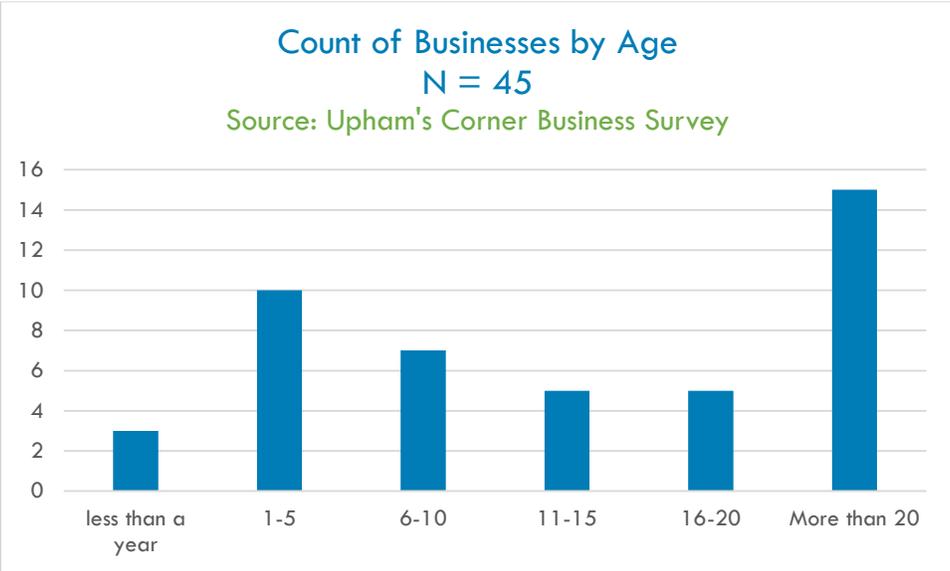
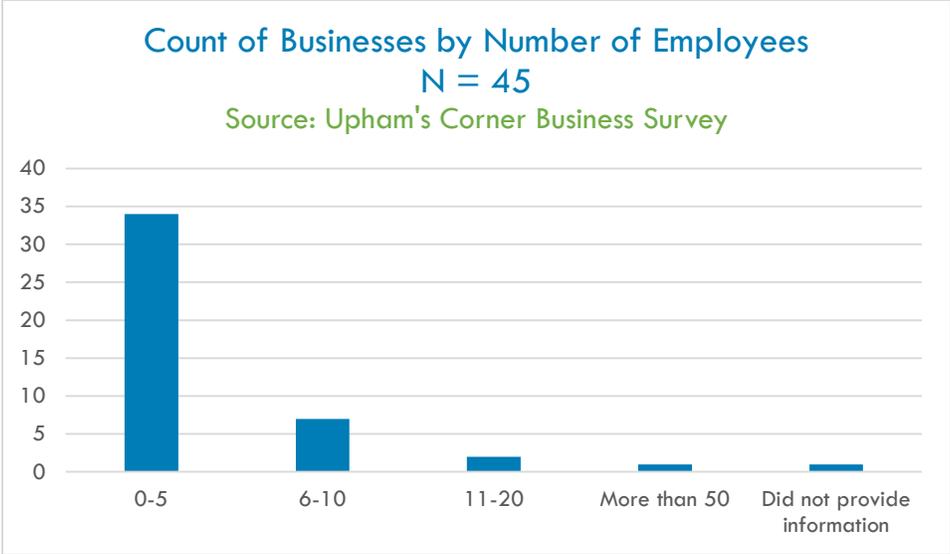
Upham's Business Survey Question Recommendations

	<u>Question</u>	<u>Type</u>	<u>Response Type</u>
1	Business Name	Open text	Text
2	Business Type	Open text	Text
3	Business Age	Open text	Text
4	How many years at location? (in neighborhood?)	Open text	Text
5	Do you rent or own your space	Dichotomous	Rent / Own
6	How many sq ft does your business occupy?	Open text	Text
7	If you have a current lease, how long is it?	Open text	Text
8	Does your lease allow for a guaranteed option to renew?	Dichotomous	Yes / No
9	Does you lease stipulate fixed annual increases?	Dichotomous	Yes / No
10	How much have you invested in your business in the last 3 - 5 years	Open text or range	Text or range
11	How was this investment financed?	Multiple Choice	Personal assets, bank loan, government program, friends / family, business revenue
12	Do you have access to a financial lending institution for your business?	Dichotomous	Yes / No
13	In the next 3 - 5 years do you anticipate your business sales to	Multiple Choice	Grow, Stay Steady, Decline, Not planning on being in business in the next 3 - 5 years.

14	What are the three biggest challenges to doing business in Upham's Corner?	Multiple Choice	Rising real estate costs, Safety, Lack of transit, Finding qualified employees, Tickets and fines, Other
15	What would you / the business need to be successful long-term in this location?	Open Text	Text
16	What could the City of Boston do to improve business conditions in Upham's Corner	Open Text	Text

COMPLETE SURVEY COUNTS

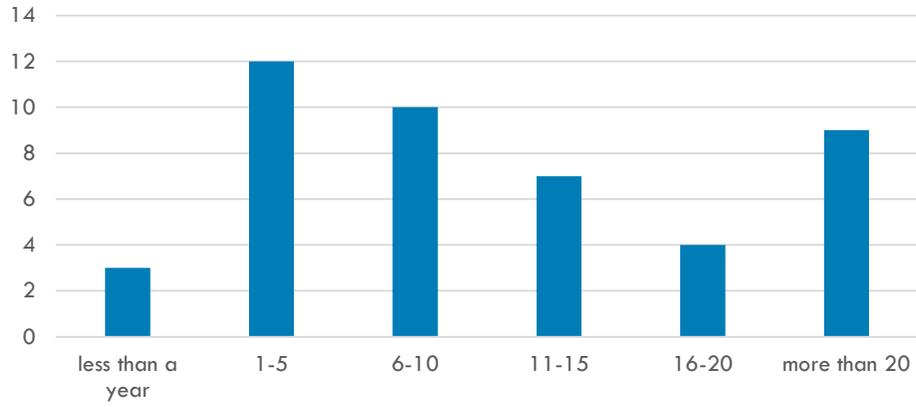




Count of Businesses by Current Ownership Tenure

N = 45

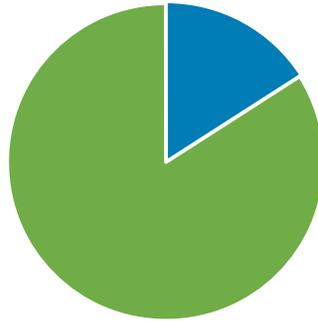
Source: Upham's Corner Business Survey



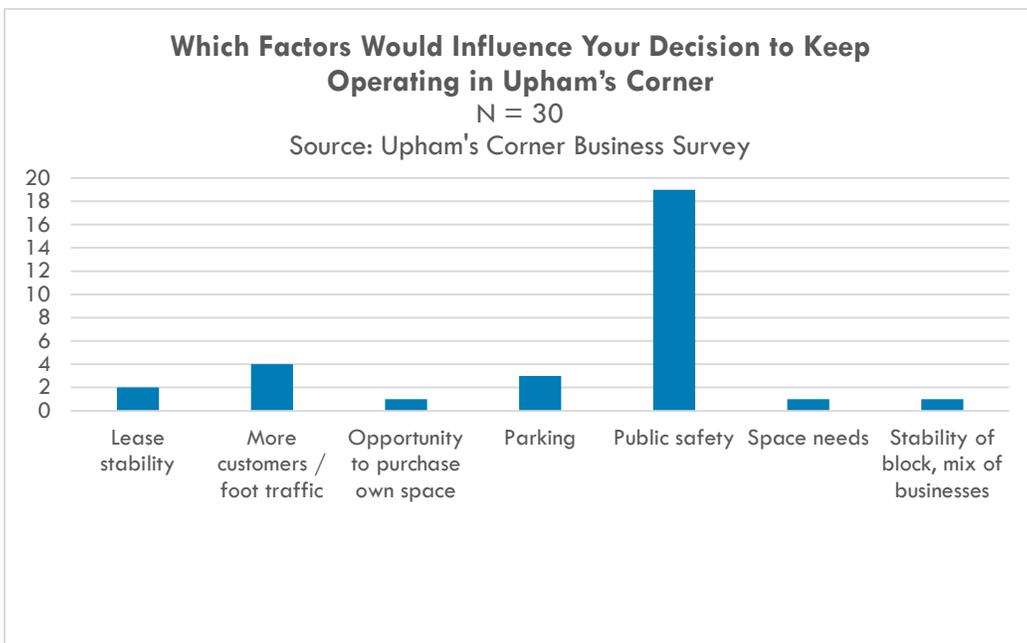
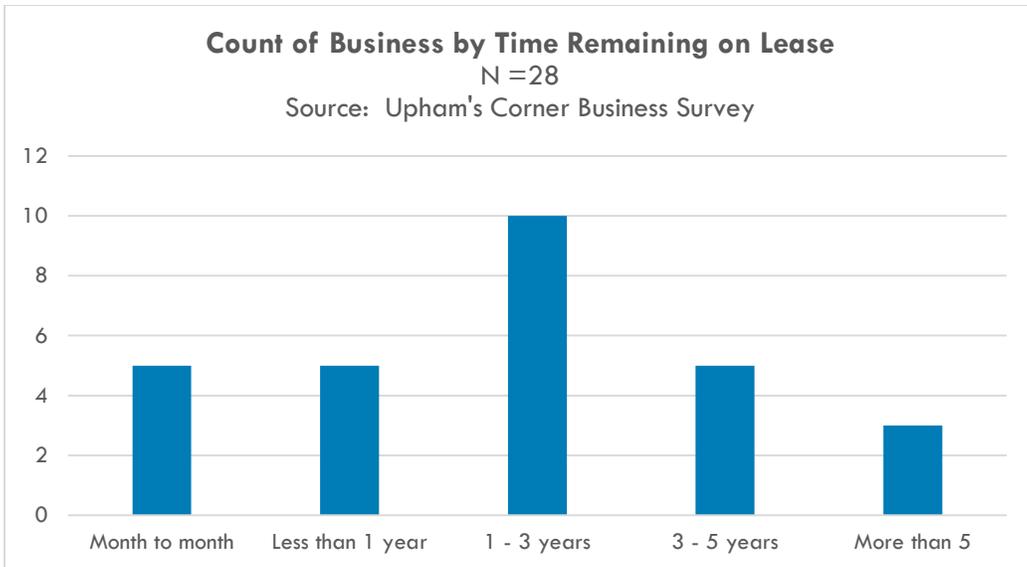
Percent Rent vs Own

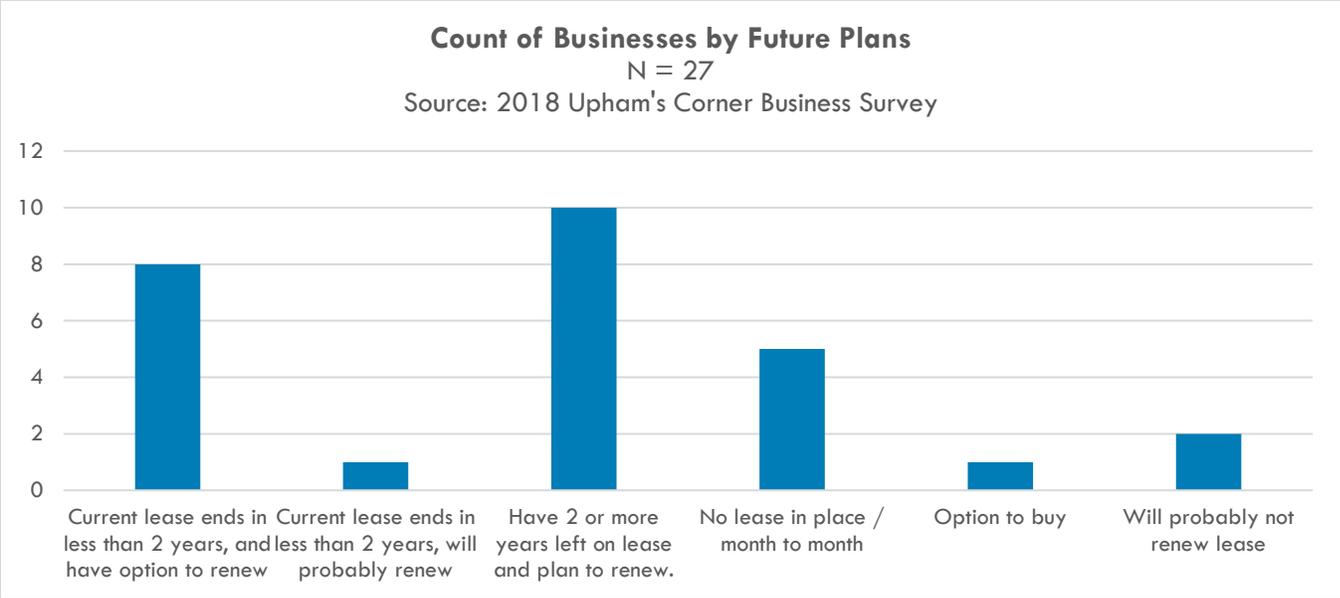
N = 44

Source: Upham's Corner Business Survey

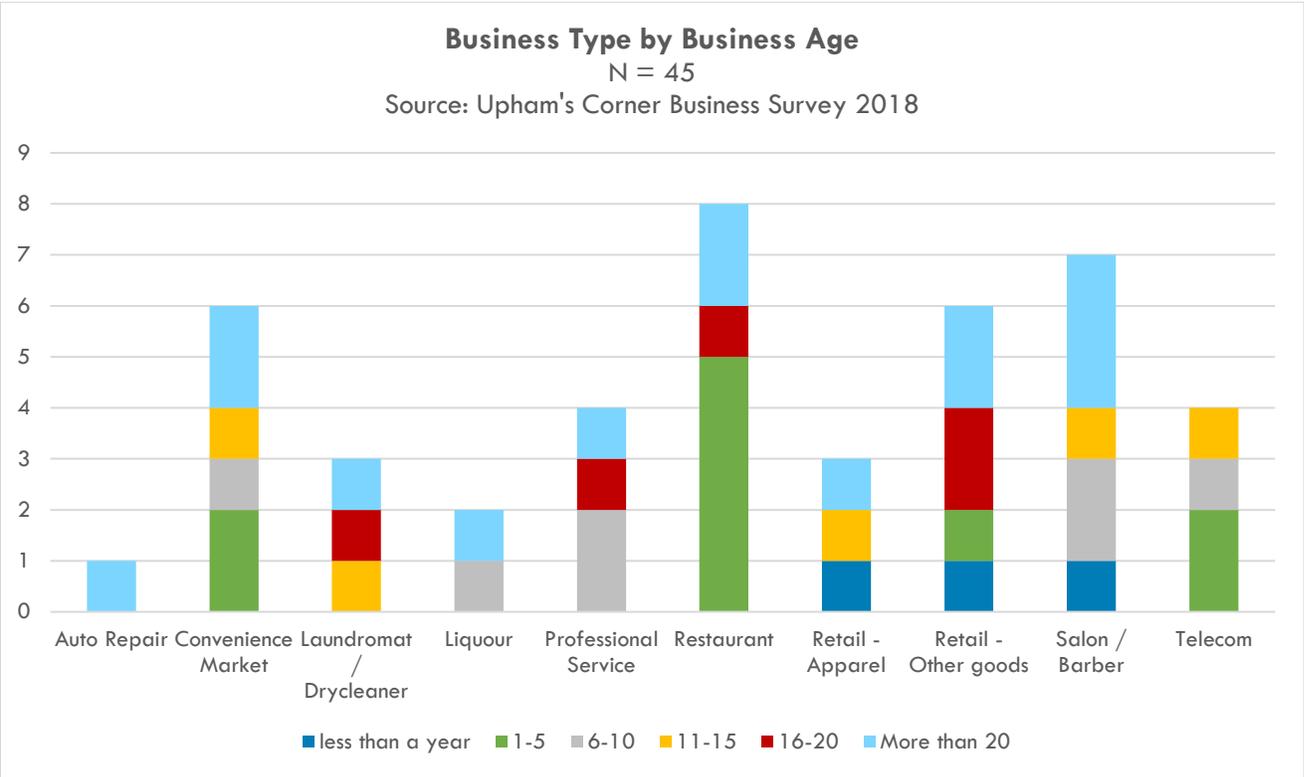


■ Own ■ Rent





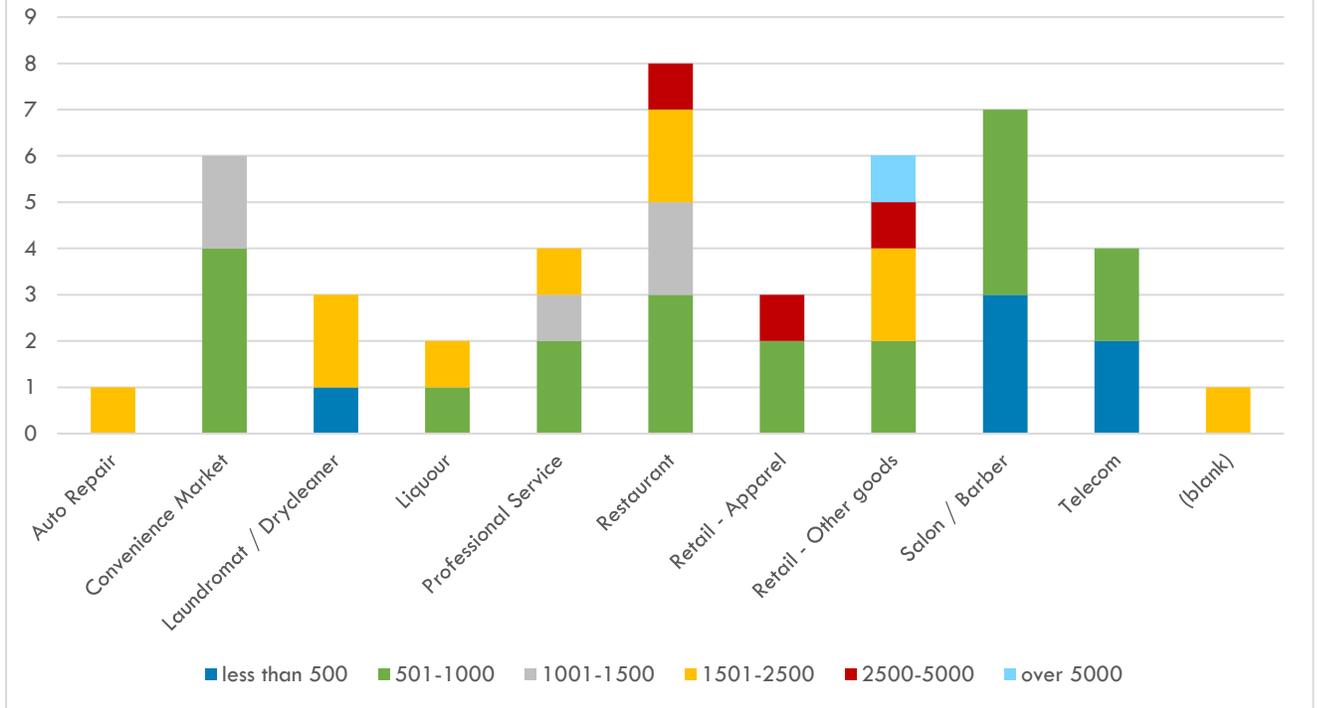
SURVEY CROSS TABS



Business Type by Sq Footage

N = 44

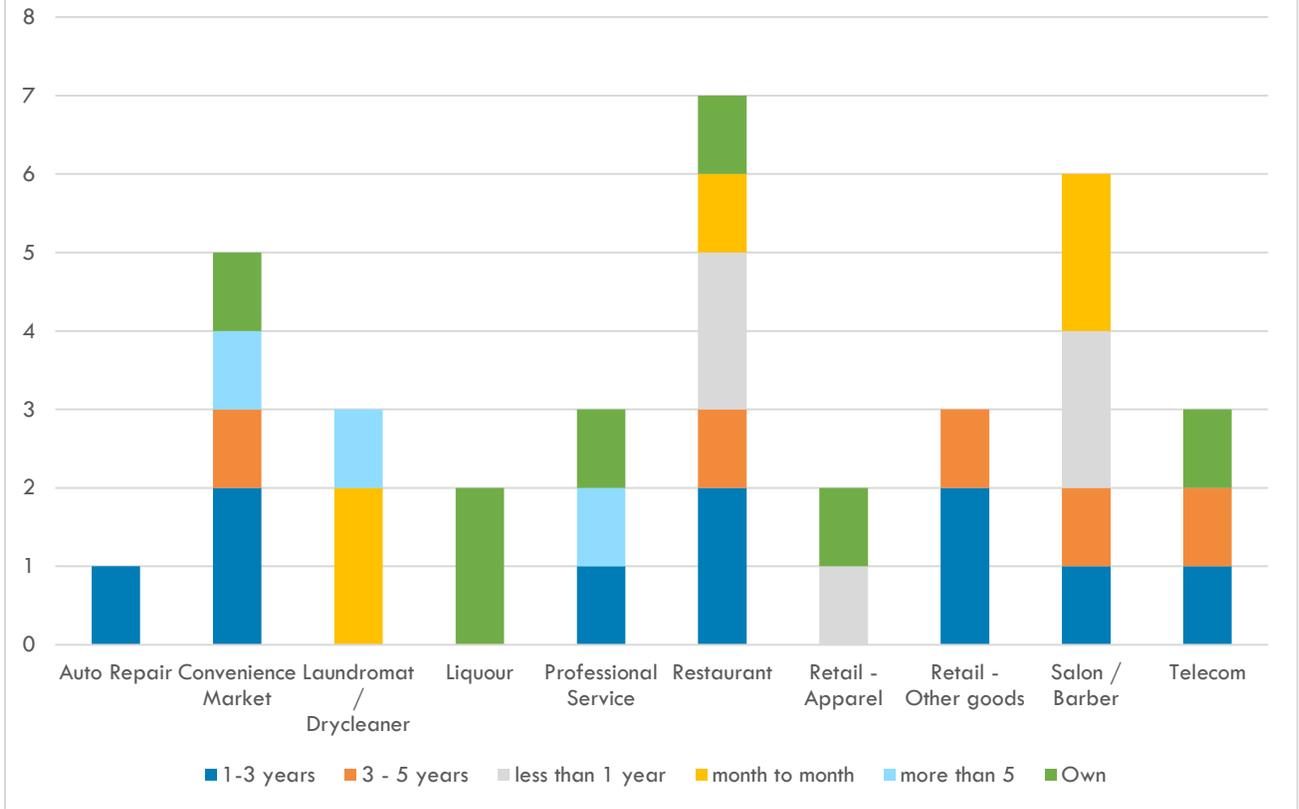
Source: Upham's Corner Business Survey 2018



Business Type by Lease Condition

N = 47

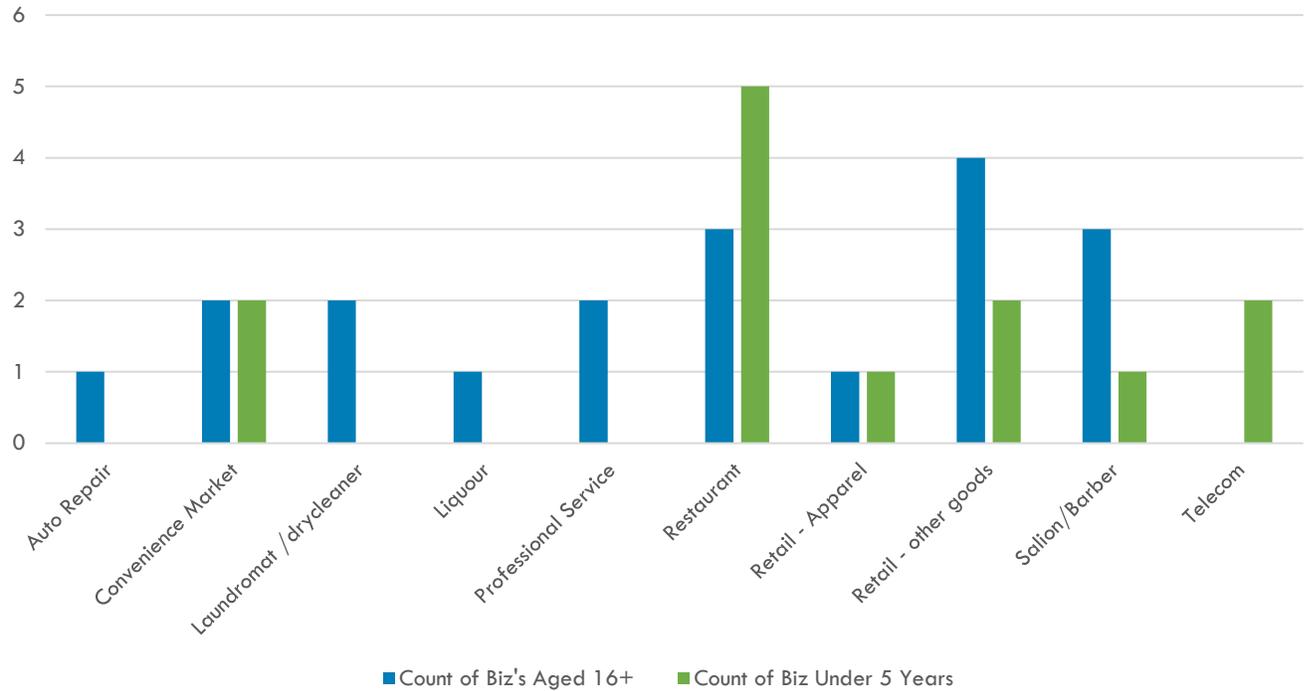
Source: Upham's Corner Business Survey 2018



Older (15+) vs Newer (<6) Businesses by Type

N = 32

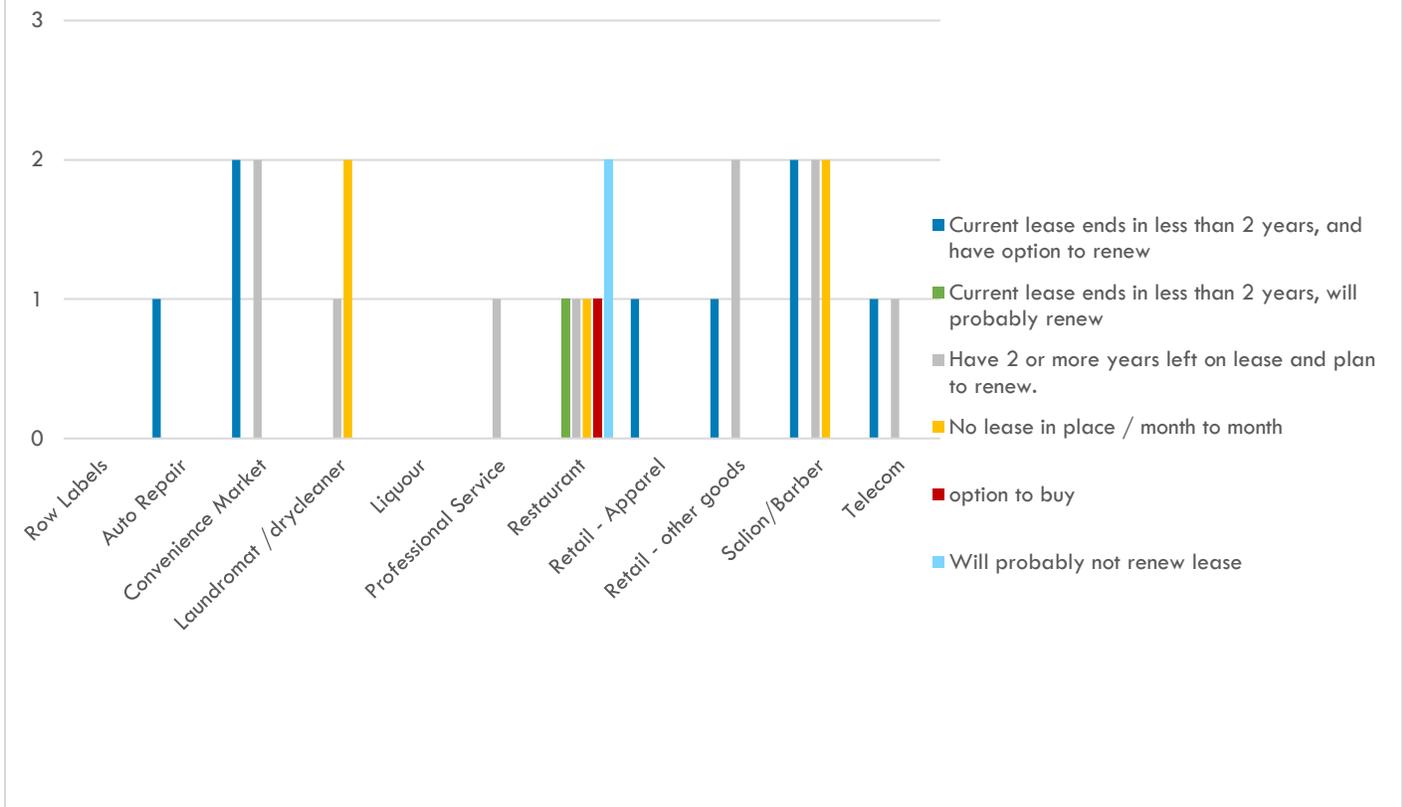
Source: Upham's Corner Business Survey 2018



Business Future Plans by Business Type

N = 27

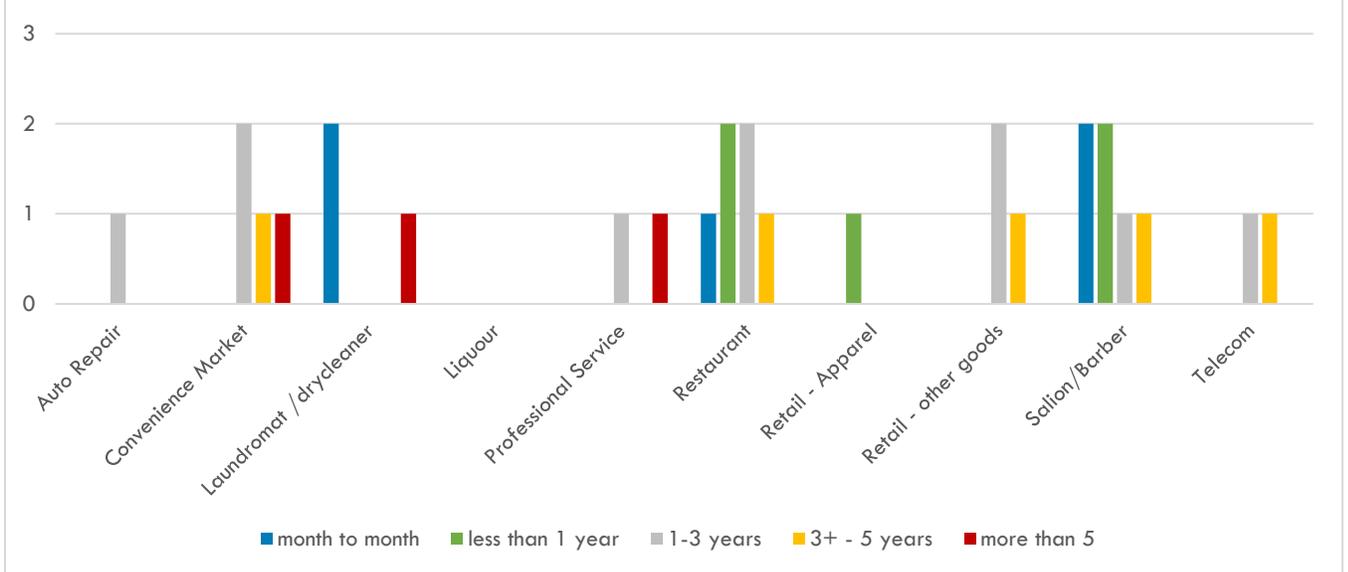
Source: 2018 Upham's Corner Business Survey



Business Lease Conditions by Business Type

N = 28

Source: 2018 Upham's Corner Business Survey



APPENDIX C: WORKFORCE DEVELOPMENT FINDINGS FROM PREVIOUS STUDIES

FINDINGS FROM PREVIOUS PLANNING STUDIES

Specific recommendations for Upham’s Corner that fall under the three themes of invest, partner, and connect are included below with sources for each recommendation. Common themes are the need for additional capital to support small businesses and entrepreneurs, better transit connections with education and employment centers, stronger ties between secondary education and career readiness, and the importance of building on the existing assets in the neighborhood, including the Strand Theatre as a center of the arts. Previous planning studies recommended the following approaches to improving workforce access and outcomes in Upham’s Corner:

Invest in

- **job training and education** for residents along the Fairmount Indigo Corridor.⁹⁷
- **a business assistance program** that would provide a small revolving start-up fund for small businesses and provide mentorship, training or partnerships with more established businesses.⁹⁸
- **innovation hubs** with Fab Lab technology - resources for community utilizing technology to fabricate objects and train residents would develop links to connect community with technical schools and local industries.⁹⁹
- **the infrastructure businesses, artists, and entrepreneurs need to succeed**, including affordable commercial space, incubation, access to reliable transportation, and streamlined City processes for setting up and growing a business.¹⁰⁰

Partner

- **employers and residents with community colleges and vocational schools** to prepare workers for twenty-first-century industrial jobs.¹⁰¹
- **local companies and youth programs with Mayor Summer Jobs program and K-12 education** to provide gap-free pathways from education to career opportunities.
- **with educational institutions and organizations** to establish satellite offices, training centers and programs along the Fairmount Indigo Corridor.¹⁰²
- **with the City’s Office of Small Business Development** for a match-making initiative; identify neighborhood preferences for local businesses and restaurants that complement the Strand Theatre.¹⁰³
- **with local capital providers** to provide low cost capital to small businesses.¹⁰⁴

⁹⁷ Fairmount Indigo Planning Initiative Corridor Plan. Boston, MA: Boston Redevelopment Authority, 2014, p. 36.

⁹⁸ Fairmount Indigo Planning Initiative Upham’s Corner Station Area Plan. Boston, MA: Boston Redevelopment Authority, 2014, p. 34; Fairmount Indigo Planning Initiative Corridor Plan. Boston, MA: Boston Redevelopment Authority, 2014, p. 37.

⁹⁹ Fairmount Indigo Planning Initiative Corridor Plan. Boston, MA: Boston Redevelopment Authority, 2014, p. 104.

¹⁰⁰ Imagine Boston 2030. Boston, MA: Boston Mayor’s Office and others, 2017, p. 327.

¹⁰¹ Imagine Boston 2030. Boston, MA: Boston Mayor’s Office and others, 2017, p. 327.

¹⁰² Fairmount Indigo Planning Initiative Corridor Plan. Ibid.

¹⁰³ Fairmount Indigo Planning Initiative Upham’s Corner Station Area Plan. Boston, MA: Boston Redevelopment Authority, 2014, p. 34.

¹⁰⁴ Ibid, p. 326.

Connect

- successful small businesses, restaurateurs, or entrepreneurs to prospective restaurateurs, employees, or trainees to expand and extend success throughout Upham’s Corner.¹⁰⁵
- residents and businesses to new opportunities and partners through network of existing Upham’s Corner community, health, and training centers.¹⁰⁶
- youth to training and education pipeline through programs like the Mayor’s Summer Jobs Program and vocational training in commercial facilities.¹⁰⁷

CREATIVE INDUSTRY CONTEXT IN BOSTON

The Upham’s Corner Implementation Plan builds on extensive planning efforts. Three reports help contextualize trends in the creative economy and other industries related to the operations of the Strand Theatre in Boston and the surrounding region.

Boston’s Creative Economy: An Update (2017) published by the *Boston Planning and Development Agency Research Division* highlights growth areas for the Creative Economy in Boston. Boston’s Creative Economy saw growth in a number of creative sectors and occupations between 2002 and 2014. A number of fields and occupations that workforce development programs at the Strand might feed have shown growth and are projected to see employment growth by 2024.

Creative Sector Industries	Growth 2011-2014	2014 Employment	Average Annual Wage
Advertising	35.1%	3,751	\$98,385
Applied Arts (Architecture, Interior Design, Graphic Design, Etc.)	13.4%	4,034	\$87,370
Broadcasting	-22.4%	1,928	\$96,151
Film, Video, and Photography	2.0%	857	\$41,261
Independent Artists	151.9%	136	\$59,087
Performing Arts	7.3%	3,329	\$36,825
Sound Recording and Music Publishing	3.9%	106	\$71,375
Support Services (Fine Arts Schools, Libraries and Archives)	15.0%	568	\$30,063

In addition to the Creative Industry sectors identified above, there are several more traditional occupation and industry types that could also serve as a focus for workforce initiatives at the Strand. Set building and facilities maintenance occupations at the Strand could provide a foundation for the construction industry; and food preparation and concession occupations could lead to career pathways in a variety of food service industries.

¹⁰⁵ *Fairmount Indigo Planning Initiative Upham’s Corner Station Area Plan*. Boston, MA: Boston Redevelopment Authority, 2014, p. 34.

¹⁰⁶ *Fairmount Indigo Planning Initiative Upham’s Corner Station Area Plan*. Boston, MA: Boston Redevelopment Authority, 2014, p. 34; *Fairmount Indigo Planning Initiative Corridor Plan*. Boston, MA: Boston Redevelopment Authority, 2014, p. 37.

¹⁰⁷ *Imagine Boston 2030*. Boston, MA: Boston Mayor’s Office and others, 2017, pp. 275, 326, 328-329.

The Boston Workforce Development Area Greater Boston Region WIOA Local Plan (2018) published by the *Boston Private Industry Council* provides additional employment and long-term industry growth projections for these more traditional sectors. Accommodation and Food Services is the fourth largest industry sector by employment in Greater Boston with a total employment of 136,127. Restaurants and other eating places account for the largest share of employment in this sector at 98,771 in 2016. Carpentry is identified as one of Greater Boston's 4- and 5- star occupations requiring a high school diploma and an entry point to a construction career path with wages around \$35,000 to \$65,000 that leads to higher-wage supervisor and manager positions with annual wages ranging from \$80,000 to \$110,000.

Boston's Workforce: An Assessment of Labor Market Outcomes and Opportunities (2016) published by *Boston Mayor's Office of Workforce Development, Boston Redevelopment Authority* reinforces these findings and highlights the relatively low wages associated with the food services industry. Income for the top two-thirds of workers in Food Preparation and Serving Related Occupations are only \$33,915. While Construction and Extraction Occupations see income of \$82,277 for the top two-thirds of workers, employment in that industry (9,450 in 2014) is significantly less than in Food Preparation and Serving Related Occupations (46,830 in 2014).

APPENDIX D: UPHAM'S CORNER STAKEHOLDER INTERVIEWS

Upham's Corner Stakeholder Interviews Summary and Key Findings

STAKEHOLDER INTERVIEW PURPOSE AND METHODOLOGY

The Metropolitan Area Planning Council's (MAPC) scope of work for the Upham's Corner Arts and Culture Planning Process Phase II covers five distinct task areas of work. As components of Task 2: Alternative Use and Preliminary Operations Research for the Strand and Task 4: Arts and Cultural Workforce Development Strategies, MAPC conducted a series of structured interviews with relevant stakeholders to gain insight as to what types of uses and economic development approaches could be integrated with the Strand Theatre redevelopment, and how the economic conditions of the Upham's Corner area could be leveraged to further workforce development opportunities. Additionally, MAPC spoke with three members of the Upham's Corner Working Advisory Group (WAG) to better understand how the redevelopment of the Strand Theatre can meet the current community's cultural, social, and economic needs.

MAPC has conducted nine interviews to date with three more to be scheduled, see appendix for list of organizations interviewed during this process and date of interview. All interviews were conducted in person between November and December of 2017 and were recorded to assist the planning team with accuracy and detail¹⁰⁸. MAPC will conduct additional interviews with the Dudley Street Neighborhood Initiative, Roxbury Innovation Lab, and Transformative Culture Project to complete this research task.

This set of appendices includes summaries of interview findings related to the creative economy, a schedule of the stakeholder interview process, transcripts of the nine interviews conducted to date, interview scripts for both the economic development and WAG stakeholders, and a matrix cross referencing major themes identified during the BPDA's public planning meetings with specific quotes from the interview process.

STAKEHOLDER TYPOLOGIES

The stakeholders interviewed were categorized into four typologies: Neighborhood CDC's and Technical Service Providers, Artistic / Creative Enablers, Arts / Education / Advocacy organizations, and members of the City's Working Advisory Group. The following section briefly describes the role of these organizational typologies within the Arts and Innovation Economy.

Artistic / Creative Enablers

Fairmount Innovation Lab, The Record Co, Roxbury Innovation Center

¹⁰⁸ Four of the organizations and individuals interviewed asked not to be recorded or to have their recording held as confidential by MAPC: Upham's Corner Main Streets' Board President, Bob Haas, Che Madyun, and Dorchester Bay Economic Development Corporation.

Artistic / Creative Enablers provide a critical role in the arts and innovation economy by providing low cost and flexible spaces along with shared equipment. These spaces allow artists and entrepreneurs to avoid upfront costs while growing a businesses or craft from the ground up. Flexible spaces also allow a physical place for networking and collaboration to occur. In the case of both the Fairmount Innovation Lab (FIL) and the Roxbury Innovation Center, the organizations offer curriculum style education for potential entrepreneurs.

Neighborhood Community Development Corporations and Technical Service Providers

Dorchester Bay Economic Development Corporation, Upham's Corner Main Streets, Dudley St Neighborhood Initiative

Arts and Innovation uses thrive in stable and affordable real estate environments anchored by strong community organizations. Neighborhood Community Development Corporation's like Dorchester Bay Economic Development Corporation (DBEDC) and Dudley St Neighborhood Initiative (DSNI) have the ability to build in affordability and stability into the real estate market, which can be volatile and easily exclusive for uses that cannot afford market prices. These organizations, in conjunction with local Technical Service Providers like the Upham's Corner Main Streets (UCMS), play a key role in connecting stakeholders in the workforce development pipeline, business financing world, municipal permitting processes, and neighborhood attraction and revitalization.

Arts and Community Connectors

Design Studio for Social Intervention, Transformative Culture Project, Artmorpheus

These organizations help to drive activities, events, and attractions that expose the inherent artistic base of a community. Arts and community connectors are able to work between local residents, businesses, and artists to identify and realize community goals and values. Much of what these organizations do is create opportunities for new types of economic and community activities to occur through programming, events, and installations.

Working Advisory Group Members

Che Madyun, Joan Tighe, Bob Haas

The members of the WAG interviewed during this process are all longtime residents of the area and have experience working with a number of local groups including The Strand, DBEDC, and UCMS. The perspective they provide on the area is unique and is critical in better understanding the realities and needs of the local community.

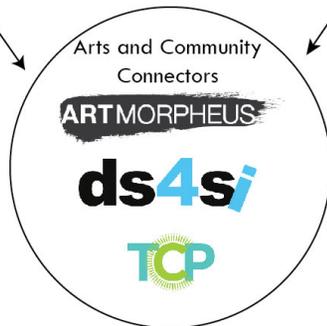
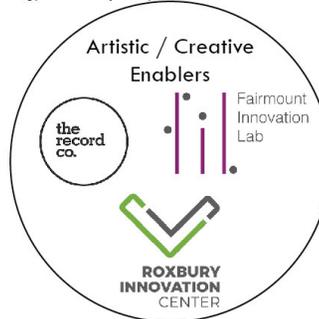
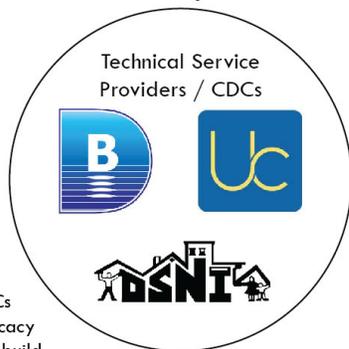


Upham's Corner Creative Economy Network

Artistic / Creative Enablers rely on CDCs to provide below market rents for their own operations and users that grow out of their facilities, as is the case for the Fairmont Innovation Lab and Dorchester Bay Economic Development Corporation. Technical service providers work with businesses that grow out of enabler organizations to establish financing, access space, and refine business plans.

Established Businesses
Job Seekers

Early Stage Entrepreneurs
Product Oriented Artists



Technical service providers and CDCs partner with arts, education, and advocacy groups to encourage activities that can build economic development opportunities. Their relationships with local businesses and landlords can be leveraged to activate empty or unused spaces. The placemaking projects DS4SI has done in Uphams Corner illustrate this kind of partnership.

The flexible workspaces and shared equipment opportunities that are available via Artistic / Creative Enablers can support arts residencies, educational programming, special events, and retail opportunities programmed by arts, education, and advocacy organizations.



Photo: Lori Lobenstein



Photo: Jo Christopher via Fairmont Innovation Lab

Artists
Educators

KEY THEMES

Through an evaluation of the nine interviews conducted to date, MAPC has identified several key reoccurring themes through the interview process. The following is a description and contextual narrative of those themes.

Space

There is a strong connection between permanently affordable commercial / flexible space and arts entrepreneurship opportunities. The three organizations that inhabit and program physical space (FIL, TPC, The Record Co) all cited that they would like to expand in the near future to accommodate growth in their services. What that means for these organizations is different in terms of the physical attributes of the space and equipment, however it does point to the appetite within the Boston area for more facilities that can absorb the upfront capital costs associated with creative or artistic type businesses, allowing young artists and entrepreneurs the opportunity to build their brand and business without large amounts of early capital or investment.

For example, Matt McArthur (Executive Director at The Record Co) described the critical need for soundproof studio and rehearsal space, an expensive and often architecturally prohibitive feature. McArthur says, “The things people choose to do here are loud things! Our users can turn up the sound as loud as they want, something they cannot do in their living room.” While music technology has drastically changed how music recording is done, it hasn’t changed the volume at which music is produced. An individual artist can make a studio quality recording in their living room but they won’t be able to do it as loudly as they can at the Record Co. The same is true of band rehearsal. Working Advisory Group member Che Madyun also commented on the need for musical rehearsal space: “Artists’ housing is not for musicians because it isn’t sound proofed. Where do you go to rehearse as a band? Where are the practice rooms? That doesn’t exist around here.”

For the FIL, the communal resources and flexible environment are the attributes most in demand by the facilities clientele. “The fact that this is a cheerful co-working space makes it attractive. This place is light and visible and welcoming. It is a safe environment, non-governmental and non-bureaucratic. People feel like they belong to the space and can be a part of it.” says Liora Beer, Executive Director at the FIL. The lack of quality, affordable, and accessible office space in the area is a challenge that the FIL aims to address by providing a subsidized working environment in the Upham’s Corner area. The FIL also offers a small fabrication lab which Beer says she would like to expand with additional equipment such as a laser cutter and new 3d printer. “Right now, if anyone wants to do something physical they need to go someplace else.” Says Beer.

The TCP is currently in the process of transitioning their operations to a new larger space with new facilities for their entrepreneur cohort, digital and audio recording, and general programming. Beyond TCP’s operating space, Development Director Reggie Williams cited the need for more access to public realm spaces for the organizations constituents. Williams discussed how public facilities such as The Strand and The Bolling Building are often inaccessible for the community to use for artistic purposes or otherwise. “Artists have proposed things (for these spaces) but they always fall on deaf ears.

Both the FIL and the Record Co are able to provide their services to creative users because they have access to below market rents themselves. The FIL operates out of the Pierce Building, owned by DBEDC, a not for profit that doesn’t need to meet the same rate of return that a private land owner would from rental costs. The Record Co currently has a below market lease on an industrial building in the Newmarket area, and is actively looking for new affordable space as their lease is set to expire in 2019 and it is possible the landlord will increase the rent substantially. McArthur says

that his ideal space would be between 10,000 and 25,000 square feet at not more than \$20 / square foot. Accessing information from other arts organizations regarding their lease structures and rates could be beneficial in better understanding the position that growing or moving creative uses are in when considering the Boston real estate market. This is an area that could be explored further in subsequent phases of work.

It should be noted that while The Record Co and the FIL operate under a similar business model, the organizations serve very different populations. The FIL has set an organizational priority of providing space for creative and social enterprise entrepreneurs, specifically entrepreneurs of Color. The Record Co. operates under the organizational model of being culturally agnostic and open to any artistic user, however McArthur has described his clients as mostly white and not from Boston proper. McArthur said that becoming more accessible to the immediate community was something The Record Co would be striving for in the future.

While the arts and creative type businesses and users are thriving in small flexible spaces like the Record Co and FIL, these types of users are not necessarily being linked to the street level experience in Upham's Corner. "There is definitely a divide between the FIL businesses and the traditional retail establishments in Upham's Corner" says Beer. Working to bridge this gap and integrate the Fairmount Innovation Lab's activities and business community's expertise and services with the traditional street level businesses could be an area for further exploration.

On the traditional retail front, businesses face a similar squeeze for affordable real estate. "Businesses used to be able to pay \$10/ square foot for space here, now a newly renovated space will run as high as \$30 / square foot" says Valeska Daley (Executive Director of UCMS) and Bob Haas of the WAG. Leah Whiteside and Alan Waxman of DBEDC echo the sentiment of a tight retail market, especially in the case of renovated spaces. "Retail and restaurant businesses in the area are paying up to \$23/square foot, which is higher than expected. New construction is always a challenge because the prices need to be a bit higher to make the financing work." Says Whiteside. These high prices are often prohibitive to smaller entrepreneurs because they are reliant on business cash flow to pay the rent, as opposed to corporate entities which have additional capital to support new storefront locations. Daley and Haas cited an increase in the number of mobile phone stores in the neighborhood which may be an indicator of an emerging trend towards corporate retailers.

Collaboration and Complimentary Arts Uses

Many of the organizations and individuals that MAPC spoke with cited the need for collective organizing and planning around arts uses in Upham's Corner, anchored by The Strand. There was a seeming recognition among stakeholders that co-location and collective fundraising could catalyze new opportunities in the area. "Colocation of initiatives would be great, that would allow for joint fundraising and lower operations costs" said Beer. To accomplish this successfully, the stakeholders alluded to the need for community-oriented and community-responsive programming that would rely heavily on broad outreach and a community-organizing approach.

For the Record Co, the idea of co-locating with other arts and business users could be a way to assist their clients in reaching new audiences. "The lack of specialization is a challenge that is keeping our community from being the best they can be. If musicians could just focus on writing the best most penetrating song, and not have to worry about marketing and sales, the content would be better." McArthur described how it would be beneficial to be in proximity to individuals who are interested in providing music promotion, advertising, events, and other support type services to musical artists. For the most part, the musicians using the Record Co don't have any industry or business experience

to complement their talent, which presents a challenge in reaching new audiences or broadening their base.

The needs of the artists using the Record Co may be specific to the music industry, but the idea of specialization and support systems and services could be applied to other existing arts users in the Upham's Corner community. "Artists want to be supported with studio space but also with more opportunities to develop the business side of their work" said Lori Lobenstine (Executive Director at the Design Studio for Social Intervention (DS4SI)), indicating there may be a similar need among visual or other types of arts / artisanal users as to musicians. Che Madyun also reflected on the need for more business training and support services within the community "Business training for artistic practice – kids, older people, where do they go to learn how to build a business out of their art? Where do they go to find out how to get information?"

Daley of UCMS cited organizational capacity as another challenge for expanding the programming that occurs in the area. "UCMS hosts an annual arts festival with the health center – we used to have 3,000 people coming out here. We don't have the capacity to do that anymore." Daley also cited her organizations role in coordinating and communicating with the various other non – profits in the area, including DSNI, DBEDC, Bird St Community Center, and the Upham's Corner Health Center.

In terms of complimentary arts uses to The Strand, some of the stakeholders pointed to the recent exploration of Upham's Corner by the Boston Children's Chorus for a new location as a prime example of a use that would benefit the area. While Upham's Corner was ultimately not conducive to the chorus' organizational needs¹⁰⁹, the idea of a youth arts or educational facility came up as the type of complimentary arts use that could work well with The Strand and the other activities occurring in Upham's Corner. When asked specifically if there was complimentary use that doesn't exist in this part of Boston, Bob Haas said "A school. If there were a school with people here all the time doing this stuff, it would make a difference."

For Madyun, the idea of youth programming rises as a priority complimentary use, and not something new to the area. "The Strand ran multiple youth programs from the 1980s to the 1990s. When we had a consultant look at the program they said that our competitive advantage was our youth programs. No one else was doing anything like it, and there still isn't really anything like it today" says Madyun.

Business Attraction and Workforce Development

The existing economic base of Upham's Corner is centered on local serving and locally operated establishments with little draw from a regional audience, in contrast to the nearby South Bay Shopping Center which offers large retailers and big box options. The Brothers Supermarket and the Upham's Corner Health Center were cited as the two biggest employers and economic anchors in the area by both representatives of UCMS and DBEDC. Leah Whiteside of DBEDC describes additional food markets as successful compliments to the existing anchor businesses "The Fish Market that moved in recently is an example of a great business and the type we want to see more of in the area. It serves the Cape Verdean community, and compliments the supermarket by allowing shoppers to do all of their business in one area rather than traveling to multiple locations".

In all of the interviews with members of the WAG there was a resounding emphasis around the concept of Upham's Corner as a district that needs to be considered cohesively. "The Strand is a key anchor in the district – that is why an Arts & Innovation concept makes sense here. You need to

¹⁰⁹ Primarily due to poor transit connections, see challenges section.

maximize that as an artistic venue.” Said Tighe. Madyun emphasized the need for a variety of complimenting uses to The Strand “We need an area where everybody comes to hear the music of all the cultures in Boston; to buy goods produced out of our immigrant communities. That would attract people who live in Boston, greater Boston, and tourists.” Haas built on that idea further explaining “The Strand is an historic anchor. (After a performance) we need people on the street and sidewalks to ask themselves, “What else might I want to do?”

The answer to that question was discussed by both DBEDC and UCMS as being sit down restaurants and food establishments that could provide community gathering spaces. Whiteside had this to say: “We’ve been looking at a kind of community gathering spot, someplace that would attract outsiders, but also provide a place for local residents to congregate, hang out, and then go do other things in the neighborhood.

Furthering the idea of a district concept, many of the stakeholders discussed the need for a district operator or manager who could build relationships and coordinate between the various stakeholders. This type of district manager would need to have a well-established trust in the community as well as the organizational capacity to take on the role and build resources for action. “There are existing relationships among the partners in the area that could be built on.” Says Tighe. In recent years, Upham’s Corner has been a location for experimental arts markets and pop up events. Collaborative effort by UCMS, DS4SI, Artmorpheus and other organizations led to the creation of the Up Market, an outdoor arts market in Upham’s Corner. The Up Market created a space for local artisans, cooks, and performers to engage with a larger audience and build their reputation and sales. The Up Market was cited as an important stepping stone for some local entrepreneurs and established the potential for growth through more community events and markets. This effort was made possible through funding by ArtPlace America and provides an example of how effectively deployed resources can catalyze economic opportunities through the arts. This process was documented in MAPC’s Phase I report.

While the existing businesses in Upham’s Corner are critical in activating the streetscape and connecting the district’s commercial corridor to activities at the Strand, they are not the type of job intensive uses that can provide significant numbers of employment opportunities or workforce training experiences. Whiteside and Waxman of DBEDC cited that the majority of their job referral program references go to businesses in either the Newmarket or Readville industrial areas. They cited the New England Center for Arts and Technology (NECAT), located in Newmarket, as producing highly skilled and well qualified culinary arts workers. Many of the graduates from NECAT have been placed at the DBEDC food production facility at 196 Quincy St, which is home to Commonwealth Kitchen and several other food production businesses. Daley of UCMS mentioned The Kroc Center as also operating a culinary arts training program. There appears to be a connection to be made between the desired complimentary food oriented business uses in Upham’s Corner and the presence of well-established local culinary training. This idea should be explored further and could potentially build upon the Public Kitchen installation coordinated by UCMS and DS4SI.

Further, building the connection between arts and creative uses with workforce development opportunities surfaced as a common theme. Joan Tighe, another WAG member, elaborates on how those youth programs connect with economic prosperity by saying “I’m not sure people are aware of the career possibilities in the arts beyond performance. So training in those jobs could be something that happens here.” Daley cited the Bird St Community Center as providing a glassblowing entrepreneurship program for young men in the area as a good example of how the arts can be used to build skills among youth. Waxman and Whiteside of DBEDC echoed that sentiment, saying “One thing that has come up in the City’s planning process is just the number of jobs that exist in the arts sector. There is a need for light and sound experts as well as stage and set design. Those are high

skill jobs that have an opportunity for a job ladder. Those types of jobs could be supported and fostered if there were more artistic uses in the area that could provide opportunities for people to learn and experience those trades”

More explicit connections and program development in arts-based career sectors could be an area for further study and should align with the Boston Office of Workforce Development’s Career Pathways in the Creative Economy planning process.

Area Challenges

The primary issue area that emerged from the stakeholder interviews was the increasing price of real estate. For both the business community and the residents, there was a resounding sentiment that without tools to combat market pressure there would be no opportunities for either creative or arts related businesses, or stable housing for longtime residents and low to moderate income households. “I am assuming that this will become a place that I can’t afford to live in anymore. And it is not fair. We worked hard to make it livable and it makes me angry that people feel so entitled that they could sit outside when things were really bad and now that it is getting better they can come in and enjoy it while we get pushed out.” Said Madyun. When asked what the City of Boston could do to encourage more arts and cultural activities in Upham’s Corner McArthur had this to say “Affordable long term space would be number one. If they can control the physical space, and keep the private interests balanced that would be great”.

Another major challenge that came up in the stakeholder interviews was that of crime and public safety. The wet shelter operated by the Pilgrim Church was referenced by a number of stakeholders as an enabler of dangerous activity and a magnet for people from outside of the neighborhood. Leah Whiteside said this: “The spillover from methadone mile has been tough and the shelter right in the middle of the neighborhood attracts users from not just the immediate community. The shelter doesn’t do a good job in managing residents who may be using (drugs) and making the area uncomfortable for residents and businesses.” Bob Haas also mentioned the growing numbers of group quarters opening in the area as a result of cheap housing stock and programmatic incentives for new group home facilities. “We are becoming a mecca for homes being converted into shelters. Because property here is cheaper, it is attractive for group homes to people from outside the neighborhood getting priced out of other places. They take advantage of these big family houses whose owners are aging and can’t keep up with the maintenance” says Haas.

Unsurprisingly, transportation was mentioned as a challenge point in the area. While Upham’s Corner has a commuter rail station as well as service by several bus routes, it lacks the direct connection and frequency of service that enables easy and uninterrupted access. This lack of transit was cited as a deciding factor in the Boston Children’s Chorus’ decision to not locate in Upham’s Corner. “The consultant that they hired to look at the opportunity concluded that because the area is not directly on the Red Line the business idea would not be feasible, especially as there would be kids that would need to access the location” said Waxman. Waxman elaborated on how in addition to bringing people into the neighborhood, transit was cited as a key barrier to employment for local residents looking to access jobs in other parts of Boston. “If there was better service on the Fairmount Line people would have easier access to jobs. That could help make links to other areas not on the Fairmount like the Seaport or places along the Red Line. When it runs, it’s great, but it only comes about once an hour.”

STAKEHOLDER INTERVIEW LIST AND SCHEDULE AS OF 1/10/2018

Upham's Corner Stakeholder Interview Schedule			
Incubators / Service Providers	Contact Name	Contact Info	Interview Status
Fairmount Innovation Lab	Liora Beer	beer@artmorpheus.org	Conducted 11/1
The Record Co	Matt	matt@therecordco.org	Conducted 11/1
Venture Café / Roxbury Innovation Center	Alessandra Brown	alessandra.brown@vencaf.org	Not Conducted
Neighborhood CDCs			
Dudley Street Neighborhood Initiative	Ramona Alexander	ralexander@dsni.org	Not Conducted
Dorchester Bay	Leah Whiteside, Alex Waxman	lwhiteside@dbedc.org, awaxman@dbedc.org	Conducted 12/11
Upham's Corner Main Streets	Valeska Daley	director@uphamscorner.org	Conducted 12/13
Working Advisory Group Members			
WAG Member	Che Madyun	ccmadyun@yahoo.com	Conducted 12/13
WAG Member	Joan Tighe	jtconres@aol.com	Conducted 12/13
WAG Member	Bob Haas	rhaas8138@aol.com	Conducted 12/13
Arts / Education / Advocacy			
Artmorpheus	Liora Beer	beer@artmorpheus.org	Conducted 11/1
Design Studio for Social Intervention	Lori Lobenstine	lori@ds4si.org	Conducted 12/12
Transformative Culture Project	Reggie Williams	reggie@tcproject.org	Conducted 1/12

INTERVIEW QUESTIONS

Economic Development and Workforce Interview Questions

- How would you characterize the community that uses your facilities?
- What features of your facility are in the highest demand?
- Do you plan to expand your services or space in the next 3 – 5 years? If so, how? (FIL, Record Co, and Roxbury Innovation Lab)
- What types of businesses are growing in Uphams Corner? (service, design, production, tech, media, arts, etc)
- What are the spatial requirements for these types of businesses?
 - o Do these requirements match up with existing space and zoning?
- How are these businesses financing themselves and do they have adequate access to capital?
- Do these businesses have a support network that can provide technical assistance (business planning, budgeting, taxes, etc)
- Where do local businesses see themselves in the next 5-10 years?
- What educational or support service programs do you think would be most useful to your community base? (Marketing, business planning, equipment training, music business apprenticeships, etc)
- What makes Uphams corner a good place to be an emerging business?
- What are the challenges associated with businesses locating in Uphams Corner?
- What are the facilities in the area that could be leveraged for skills based training?
- What are the organized labor (unions or other trade organizations) that are present in the area and in what industries?
- What are the institutional barriers that the local population face to employment? (lack of education, language skills, childcare, etc)
- What could the city do to encourage more arts and culture activity in Uphams?
- Is there a specific need or spatial requirement that is just not accessible to the local community?

WAG Interview Questions

- Is there a specific type of equipment, facility, or space that is just not currently accessible to the local community?
- What could the city do to encourage more arts and culture activity in Uphams?
- Is there a specific need or spatial requirement that is just not accessible to the local community?
- Where does the local creative community go for resources and space?
- What does an arts and innovation district in Upham's Corner look like to you?
- Can you tell me more about how the Strand was run and what made it successful?

APPENDIX E: WAG INTERVIEW FEEDBACK RELATED TO PUBLIC COMMENTS ON STRAND THEATRE

Upham's Corner Implementation: Interview Responses Related to November 30th Event Comment Card Themes
 Updated 1/9/2018



Strand Redevelopment Themes	Interview: DS4SI	Interview: DBEDC	Interview: Fairmount Innovation Lab / Armoryphus	Interview: The Record Co.
Hub/Beacon		We have also been interested in office space and how other non-retail users can support the Strand. We have the FIL as a tenant, and we see that as part of furthering the Arts Innovation district.		
Development	Can you think about a development that is not monolithic but that supports a lot of different small businesses, a lot of different youth organizations? Artists need more opportunities, more affordable studio space, affordable housing.	[The business need in highest demand is] accessing affordable space!	This place fills a gap in the affordability spectrum. We offer affordable facilities where young businesses can collaborate and network. [The challenge facing business in Upham's Corner is] prices! The cost of real estate. There is opportunity here, you just need to find the right balance. Bank of America recently shut down so that space is an opportunity.	[The most important thing the city could do to encourage arts and culture uses is] affordable long term space. Controlling the real estate is so important.
Economic Development	Lots of the challenges are economic. Boston is an expensive place to live, and people are feeling pushed out and unappreciated.	Population density [makes Upham's Corner a great place for businesses]! Upham's is denser than Davis Square, so we definitely have the people. There are thousands of people coming through Upham's every day and it is very diverse. We have a few anchor businesses - Brothers Supermarket, CVS, the Strand Theatre, and Upham's Health Care. Would like to leverage jobs in the arts sector, technical skills in lighting, sound, etc. If there were more varied types of spaces in the area for different arts uses that would be great. We see opportunities in graphic design, web development, CAD architecture, coding and game design... Most of the job referrals we do are for the industrial areas in Newmarket and Revereville. The local retailers are great for entrepreneurs but not such high paying opportunities for employees... DBEDC has been heavily focused on attracting more food establishments to the area, especially sit down restaurants. There has been a lot of discussion around the types of businesses that could complement the Strand Theatre. Commercial vacancy in the area is not really high, maybe 3-4%. There is a new fish market, cafe, and other businesses opening. The old Citizens Bank building will be a great opportunity.	This is a place to develop new enterprises. There is demand for services like brand design, resources, legal mentorship and business models. [It] would be great to expand, we have an issue of space. We will be taking on an additional 1k sq ft in the building soon. [In the neighborhood, there are] more traditional type businesses as of now. Retail storefronts and community services, hair, laundry, food, some corporate shops. There is definitely a divide between the FIL business community and the local traditional businesses. We are still too young to have really graduated any one out of this space officially. Most of the businesses that operate here like it and are happy staying for now.	[Complimentary use that would help foster an arts economy]: As discussed, a place for music industry entrepreneurs to incubate and develop near the talent. See Fort Knox Studio in Chicago.
Funding	Why can't the city pay for the Strand to be redeveloped? They are putting tons of money into redeveloping other properties. They make tons of money on all these real estate developments all over the city. Why can't that money be used to redevelop the Theatre?	Experience with the FIL businesses is that they are typically looking for between 500-1000 sq ft with low price points. Retail and restaurant businesses in the area are paying up to \$22/sf. New construction is always a challenge because the prices need to be a bit higher to make the financing work.	We had been working in Upham's for several years with DSNI as part of a Boston Foundation grant. When this space became available there was a little bit of money to program it and I took it to begin this venture.	[We located here mostly based on] price - you can't beat \$7/sf. When the building flips it's going up to \$22/sf... [In terms of rehearsal space] The maximum amount that any arts group could pay would be \$20/sf.
Future Operations of the Strand Logistics	Duration of being in public is really important.		[To better support arts and cultural use, the city should] evaluate existing organizations and constituents. Map them out and see how the different organizations can support one another. Collocation of initiatives would be great, that would allow for joint fundraising and lower operations costs... [In this area of Boston] there is a lack of performance, production and creative development space. We need that and it needs to have built-in affordability. The Strand has the opportunity to offer that kind of space. Fairmount Innovation Lab could help support the Strand with programming and management.	Venue feasibility study showed that too much public facing stuff would distract from the mission of our org. Operations are focused on the artists only, not so much on the audience. However, that is not to say that there isn't a need for a free or low risk performance space that could allow our artists to access an audience directly.
Neighborhood Impact/Change	People are leaving the neighborhood to find housing they can afford... For the community, transit improvements and the artists we were bringing in were interpreted as a signal that others were coming. About the new T stop, people would say, "The city wouldn't do this for us."	We would like to subsidize spaces to support arts and local businesses. DBEDC provides some financing support, particularly micro loans with reasonable return rates to help support local businesses. Some businesses self-finance and we help where we can. We also provide technical assistance [business planning, etc.] to businesses whom we provide loans to.	[The community that uses our facilities is mostly] creative and social entrepreneurs. We have a focus on working with businesses run by people of color.	[Client base is mostly white. "Most users are not actually from Boston proper, they are usually early stage artists and using us is their first step to recording. The use of recording studios these days is less about the technology and more about the experience. It is similar to church] you can pray at home but you go to church for the experience. Their new client base has actually been engineers and artists from bigger more established studios. Our space is so cheap that they will do certain things with us and then rent their space out which ends up making them more money in the long run.
New Models	How are we thinking about policies? How can your home become a space where you make things and sell them - food, crafts, etc. Right now you have to jump through 40 hoops to do one little thing. When we did the UCAF, we had to hire a permitting specialist; Max, our artist for the public kitchen, needed a connection to the inspection services department in City Hall to get the right permit; people in this neighborhood can't just call up Joyce [Tristan] to find out how to get a permit to do what they want to do.			



Shared Redevelopment Themes	Interview: D54SI	Interview: DBEDC	Interview: Fairmount Innovation Lab / Atmospha	Interview: The Record Co.
Physical Space		We've been talking about how we plan to program our retail space in this building after renovation. The space is 2,500 sq. ft. and we are likely going to carve it up into 2 or 3 different retail outlets. We are not sure exactly what types of businesses will go there, but will likely build off of previous planning studies. After we renovate the building we won't be able to keep prices points so low. That's going to be an issue as other buildings redevelop - the needed improvements are going to impact the existing rental rates.	The fact that the Fairmount Innovation Lab is a cheerful co-working space makes it attractive. It is a safe environment, non-governmental and non-bureaucratic. This space creates a sense of community. [We need] more collaborative type spaces, and we also need some private office areas. Having backup computers would be good as well with some design software. We'd love to have a 3d printer and some other fabrication equipment. [There is a] general [lack of] access to design resources and equipment. Providing that would be great so the community could come to us and we would be able to provide!	Lease is up in 2019. They need a minimum of 10k sq ft and would like to have 25-50k sq ft. Sound proofing is the most important aspect of their facility. People like to be loud and we let them do that! As far as technology, music tech has become so cheap there isn't a lot that we provide in that way that they don't already have access to. It's mainly the ability to be loud and focus in the environment. [What kind of space is not accessible to the arts community?] Rehearsal space! A space that is noise and sound sensitive and also has a place for the general public to interact. A stand alone or semi-detached building would be best, single story preferable.
Process	I liked the use of Playback Theatre. I hope they bring them back. In using the term "innovation," the city needs to own what that means. Even if they are being genuine about wanting to figure out how to make it meaningful for the community, people who have been here for a long time will say, "that has not been my experience," [that the City prioritizes and ensures that the needs of residents are met through development projects and neighborhood improvements].			
Programming	The fact that we created something surprising that people could interact with while also providing real information about real things going on and collecting information was important. People are in a grind... [but] there is room to interrupt that, room for delight and surprise. People come pouring out for the multicultural festival; there is room for people appreciating beauty... We heard from a lot of people that there is a need for more youth programming.	Fill Fab Lab could be expanded. The Pearl Food Facility that we operate, and the Kroc Center has ordinary training as does NECAT in Newmarket [that could be leveraged for skills-based training]. Other arts programming would be good. We almost got the Boston Children's Chorus which would have been great, so something along those lines.	[Complimentary uses to ours include] business skills and development. Most folks have quit their fulltime jobs or school to be here. Need to find a way to take their talents to the next level. We have some relationships with financial orgs, accessing capital is tough because you have to demonstrate income. You need to build credit and build revenue and then connect with the right people. A lot of things happen inside this space that bring people in. Lots of organizations use the space - Urban League, Fashion Pop Ups, etc. Exciting things happen here and that draws people inside.	[Demand for our space is] growing. Our studio spaces are in high demand, will likely need at least two more. Also need to begin providing rehearsal space. We will need to expand and find a new location when our lease is up. The [Newmarket] area has also been beneficial because it's kind of neutral territory. It is not really part of a neighborhood per se, people feel comfortable coming here with all kinds of music...
Transportation		Transportation barriers are huge. It is difficult to get to job centers in Newmarket, Readville, and the Seaport... Transit is another barrier that has come up, we need more regular service on the Fairmount Line and a better connection to the Red Line.		[In supporting arts and culture uses, the city should] connect... the neighborhood to transit, we have actually been considering running our own shuttles to attract clients. If there was a way to connect with Dudley St and Andrew that would be great. Activate and brand the area as well. Actually improve the neighborhood infrastructure - don't just jam highways and bike lanes in.
Career Pathways		The carpenters union has been great to work with, others have been tougher. Always trying to balance the need for union labor with construction costs. There are some union members in the neighborhood but it's getting harder and harder to find middle income housing in the city so many come from outside, even as far away as Lawrence. One thing that has come up in the City's planning process is just the number of jobs that exist in the arts sector. There is a need for light and sound experts as well as stage and set design. Those are high skill jobs that have an opportunity for a job ladder. Those types of jobs could be supported and fostered if there were more artistic uses in the area that could provide opportunities for people to learn and experience those trades.		
Making a Successful District	DSNI has trust from a good portion of the community. They are a key partner. The Fairmount Innovation Lab is humble. They have a presence in the neighborhood. Lora is eager to connect with local artists.			



Shared Redevelopment Themes	Interview: D54SI	Interview: DBEDC	Interview: Fairmount Innovation Lab / Atmospha	Interview: The Record Co.
Crime/Drug Use		Crime and public safety is a major challenge to doing business in Upham's Corner [right now]. The spillover from methadone use has been tough and the shelter [right in the middle of the neighborhood] attracts users from not just the immediate community.		

Updated
1/9/2018

Strand Redevelopment Themes	Interview, WAG: Bob Haas/UCMS: Valeska Daley	Interview, WAG: Joan Tighe	Interview, WAG: Che Madyun
Hub/Beacon	The Strand Theatre is the anchor that makes an arts and innovation district make sense in Uphams. We need to see how to bring in more people... We need people on the street and sidewalks. The increase needs to relate to the anchors. People can ask themselves, "What else might I want to do?"	The Strand is a key anchor in the district – that is why an Arts & Innovation concept makes sense here. You need to maximize that as an artistic venue. Families are hungry to have exposure to art from a young age.	It would be nice to have a dance space like the Dance Complex in Cambridge – something similar, have one building for dance, one for music rehearsal and recording, and the theater. That would really create a destination... We need an area where everybody comes to hear the music of all the cultures in Boston, to buy goods produced out of our immigrant communities. That would attract people who live in Boston, greater Boston, tourists.
Development	Developers send me letters every two weeks that want to buy for cash... The DSNL land trust helps with the affordability issue... There are a bunch of artists in the Humphrey Street building – it used to be a dry cleaners. There could be more spaces like that in the neighborhood. Upstairs spaces are going to waste – we need to fill those. We have big spaces, we have potential for space – how will they connect, how do you get the uses into them? Cost is an issue [for artists]. One artist moved from the UP Market into a JP storefront; we can give artists access to events, but most of them can't afford brick and mortar stores.	Affordable housing. I really care about the housing. I get a letter a week from a development company wanting to pay cash for my house. In terms of density, I think that no more than 4-5 stories is appropriate for the area.	I am assuming that this will become a place that I can't afford to live in anymore. And it is not fair. We worked hard to make it liveable and it makes me angry that people feel so entitled that they could sit outside when things were really bad and now that it is getting better they can come in and enjoy it while we get pushed out.
Economic Development	Years ago, Main Streets looked at Economic Restructuring. We did everything in the book, we had 11 categories of things to do. We looked at clusters and anchors. There were some grocery anchors that revolved around American Food... the store that became Brothers Supermarket. It was really an ethnic food cluster. Relates to the ethnic communities and is a draw from outside the area. We got CVS to come in as an anchor. And that really works – that CVS is jammed on Saturday mornings. We had a clothing cluster around the L&M Bargain store. Their appeal was that they sold uniforms. Now that they opened locations in (Roslindale and Brockton), their store here has not gotten the same attention. There is Rainbow. It is a cluster that could be developed. It isn't being juiced. This used to be a banking center – it revolved around Dorchester Savings Bank. Now that is gone. The businesses that are growing include Brothers Market, which is expanding. Their value is in how their food relates to the ethnic communities. The Health Center is expanding. There are more restaurants coming in, but we hear that people in the neighborhood want more diversity in the food.	Upham's Corner businesses mostly serve a lower income market. There are some great ethnic elements – Brothers Supermarket is flourishing. The retail mix is kind of dull. I don't patronize businesses in Upham's Corner. I go to South Bay or Back Bay. I go to church in Back Bay.	
Funding	The finances worked with the Strand when it was successful because the lease was only for programs. The City was responsible for maintenance, etc. The monthly expense is extremely high – just the heating bill alone. Maybe you need to do a black box outside of the theater space.		If a non-profit runs it, they have access to grants.
Future Operations of the Strand Logistics	When Geri Guardino was at the Strand – it was called the McCormick Center for the Arts then – she was there for 10 years. She ran an afterschool program with an arts focus. Some joined the Strand staff, they wrote, performed, staged shows. We are trying to get back there. It didn't last because they had trouble finding another executive director when she left. They had to have bookings because they draw in dollars. You need to balance against two uses (community and regional)...		You need to constantly get the word out. It took time to build the connections and relationships to make it successful. I was the outreach person and used my organizing experience from DSNL. You need to have a dedicated person to get the word out. I would be bringing flyers all around the neighborhood about shows and people would see me on the street and ask what was happening at the Strand. We printed newsletters that would list upcoming shows and mail them to people on our list so they knew every month what was coming up. We would negotiate free or low-cost ticket blocks and send the newsletter to targeted community organizations with a block of tickets attached. Even putting the letters up on the marquee put us on the street and gave people a reason to stop and learn what we were doing. We had a sandwich board out too. We had a bulletin board in the window and we would put up fliers for other organizations' events, so you could come to the Strand to find out what was going on in the neighborhood. It allowed a cross-pollination of organizations.
Neighborhood Impact/Change	We don't necessarily want all the crime to go away to keep prices level. We just try to get the word out, "don't sell." The DSNL land trust helps with the affordability issue. It is one protective measure to get land into the land trust. We need to maintain cheap space. We will see what happens with commercial space... Because property here is cheaper, it is attractive for group homes to people from outside the neighborhood getting priced out of other places. They take advantage of these big family houses whose owners are aging and can't keep up with the maintenance.	Affordability needs to be higher than 13%. Minimum 25% affordable. JP wanted 40% affordable. We need to be thinking like that. People have lived here their whole lives and can't afford to live here anymore.	Proposed housing makes people concerned. If the city does 1/3, 1/3, 1/3, but the properties on either side are privately owned, they will redevelop as 100% market rate. That is why we have the land trust... I know artists who can't afford artists housing.
New Models			

Updated
1/9/2018

Strand Redevelopment Themes	Interview, WAG: Bob Haas/UCMS: Valeska Daley	Interview, WAG: Joan Tighe	Interview, WAG: Che Madyun
Physical Space	<p>Between the Bank of America Building and the Strand is the health center. That used to be part of the Strand and it is really needed to make the Strand work... What the Strand needs is to build out behind the stage for sufficient storage room so you can rent the stage while groups are rehearsing. It needs a modern stage. A house behind the Strand is in the way. You need to knock that down and build out to Cushing Ave.</p>	<p>The conversation around the Strand and new library is promising. It offers a great opportunity to preserve the traditional elements and experiment with new opportunities like including some smaller performance spaces in the Strand; connecting to the health center building between the Strand and the library – maybe move the health center admin offices to the old library building.</p>	
Process		<p>The job of the WAG so far on this project has been to slow the city down. They need some process and they should come up with a good, agreed upon plan for how to implement this.</p>	<p>At DSNI we take the approach that barriers are opportunities. You should take the cards where everyone wrote their fears, group them into challenges and really think about how we can turn those into opportunities.</p>
Programming	<p>It worked when Geri Guardino was running it. The asset was the youth programs – she got things happening... DSNI – they have an arts and culture focus - Citizens Bank is being envisioned as an arts development. That began 4-5 years ago. Their focus is on developing youth with talent. They discover and develop talent in youth. It would be great for the Strand to be a place to make that happen.</p>	<p>The Strand used to run a youth program that did all of that. Would love to have a youth piece back at the Strand...Not sure people are aware of the career possibilities in the arts beyond performance. So training in those jobs could be something that happens here.</p>	<p>The Strand ran multiple youth programs from the 1980s to the 1990s. When we had a consultant look at the program they said that our competitive advantage was our youth programs. No one else was doing anything like it, and there still isn't really anything like it today... Musicians need places where they can use music technology to produce their own work. We need an area where everybody comes to hear the music of all the cultures in Boston; to buy goods produced out of our immigrant communities... Business training for artistic practice – kids, older people, where do they go to learn how to build a business out of their art? Where do they go to find out how to get information? There is money out there to support arts and seniors... Provide support to adults interested in art but who can't pursue it as a career... In terms of skills – get them to do the art they love and then introduce the business side of it. Provide more information about actual jobs in the arts – make people more aware of the real career paths.</p>
Transportation	<p>We are a transit desert. It is hard to propel people to where the jobs are. Who can make those links?... With a performing arts institution, parking is a sore thumb. Cars are everything here because transit is so poor... If the city could reroute the number 1 bus to end in Upham's Corner, it would provide a direct connection to Berklee, to the Cambridge universities.</p>		
Career Pathways		<p>Not sure people are aware of the career possibilities in the arts beyond performance. So training in those jobs could be something that happens here</p>	
Making a Successful District	<p>UCMS doesn't have capacity to manage a cultural district. DSNI has the capacity to get capacity. The collection of folks in the WAG are the partners to manage the district... A successful arts district needs cheap venues that are protected.</p>	<p>The Record Company in the Newmarket area – making that link could be important. There is so much large space there that can meet the needs of artists... The partnership model of the UCAP project could be a possibility. There are existing relationships among the partners in that that could be built on. Valeska has a great relationship with someone at Berklee; she arranges for a jazz group to play at the UCMS events. The UMass Art department end of year art show was held in an empty space on Stoughton Street. That brought a lot of different folks to the neighborhood</p>	

Updated
1/9/2018

Strand Redevelopment Themes	Interview: WAG: Bob Haas/UCMS: Valeska Daley	Interview, WAG: Joan Tighe	Interview, WAG: Che Madyun
Crime/Drug Use	<p>This area has always been a crime haven. It used to be the drug capital of Boston ... Now it is more diffuse... Now we see spillovers from the opiate crisis. Not from people in this neighborhood. They are brought in by the shelter. The Pilgrim Church building was falling down and the pastor couldn't afford to maintain it so he opened a shelter in the sanctuary. We are becoming a mecca for homes being converted into shelters... Police protection is poor here, it always has been.</p>	<p>Another problem is the presence of the shelter across from the theater. It is a wet shelter, so you don't need to be clean; you have drug users, people drinking alcohol there. It isn't what people want to see when they come out of the theater at night. It isn't what anyone wants to see.</p>	

APPENDIX F: DEMOGRAPHICS AND EXISTING CONDITIONS INFORMING RESIDENTIAL DISPLACEMENT RISK ANALYSIS

Upham's Corner has experienced notable population growth in the past decade. There are approximately 17,259 residents in Upham's Corner, comprising 5,628 households. The neighborhood's population has increased by approximately 10% since 2010, or by 1,626 residents. This increase is three percentage points more than the City of Boston, which saw an increase of 7% during the same time period. The number of households in the neighborhood has increased by 9% since 2010, or by 446. The growth in population and households is partly due to the City's economic growth over the last six years, especially in professional services, health care, and education.

A majority of households in the neighborhood are families. As the population increased, the household composition of Upham's Corner remained consistent. Approximately 67% (3,774) of current households are families. The remaining 33% (1,854) of households are not families and can include roommates, singles, unmarried couples, and seniors living alone or with unrelated persons. The percentage of families in Upham's Corner is higher than the City of Boston's 48%. The average household size in Upham's is higher than that of Boston—2.98 people per household compared to 2.35—reflecting the number of families in the neighborhood.

RACE + ETHNICITY

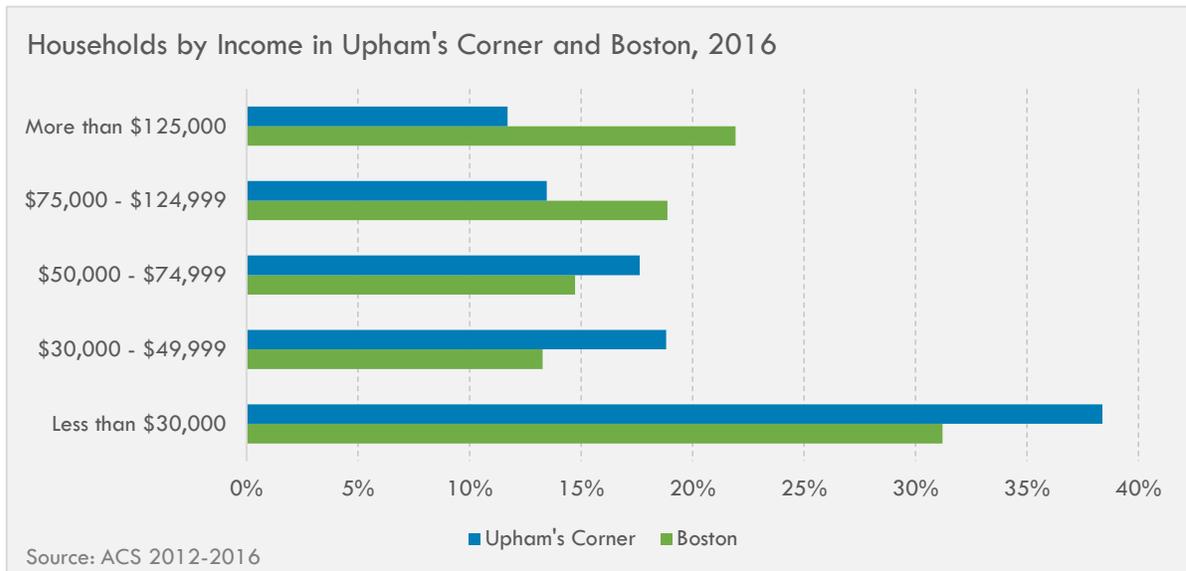
Upham's Corner is a very diverse neighborhood. In total, about 86% (14,898) of residents identify as non-White, significantly higher than 55% in the City of Boston. Approximately 42% (7,195) of residents in the neighborhood are African American, while 27% (4,666) are Hispanic or Latino. About 14% (2,361) of residents are White alone, while 4% (721) are Asian. Approximately 9% (1,544) of residents identify as some other race, and 4% (749) are two or more races. Upham's Corner has seen a 2% increase in residents that identify as Hispanic or Latino, White, or African American. Structural racism and segregation have contributed to lower mobility levels for non-White residents across the city, especially for African Americans, who continue to have lower educational and economic opportunities than other races. This may translate to less housing opportunity for Upham's residents of color compared to their White counterparts.

HOUSEHOLD INCOME

Households in Upham's Corner have lower incomes than those in the greater City of Boston. Median income levels for households in Upham's Corner range from \$31,031 to \$64,280, compared to Boston's median of \$59,984.¹¹⁰ Approximately 57% (3,219) of households, in the neighborhood earn less than \$50,000 year, higher than Boston's 44%. Of these households, 38% (2,160) earn less than \$30,000, higher than Boston's 31%. About 18% (992) of households earn \$50,000-\$74,999, compared to 15% in Boston. The percentage of moderate-to-middle-income households

¹¹⁰ Due to the relatively high margins of error of survey data, it is not possible to track income changes from 2010 to 2016. Tract-level ACS data was used to find median household incomes, as the margins of error in block group-level data were too high. However, these are not exact matches to the neighborhood geography and may differ slightly from actual household incomes.

earning \$75,000-\$124,999 is 13% (758), lower than Boston's 19%. Finally, an estimated 12% (659) of households earn over \$125,000, almost half of Boston's 22%.



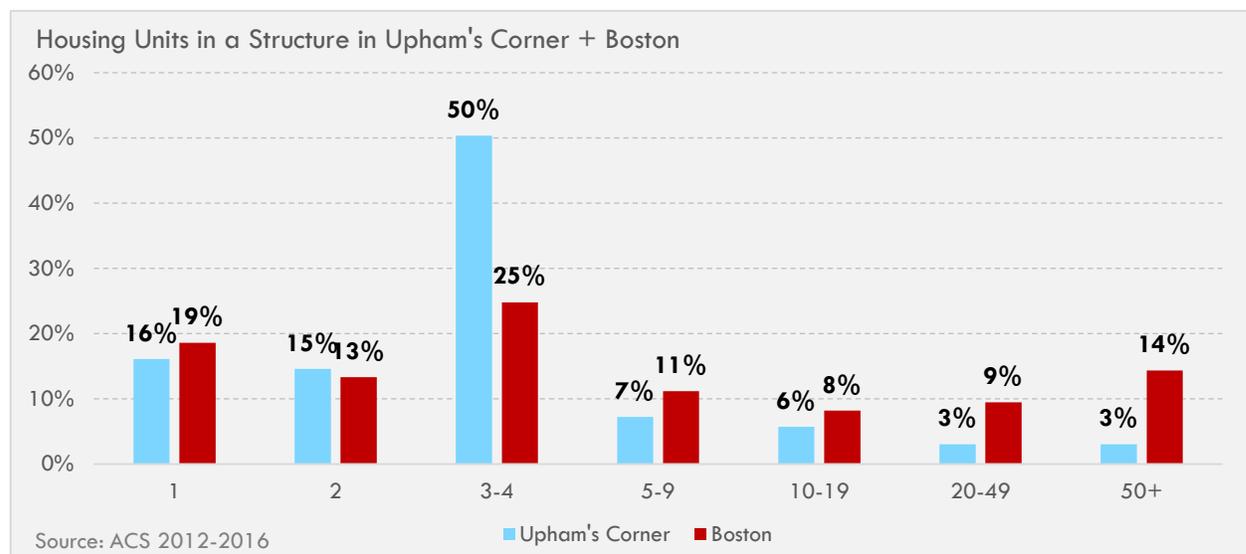
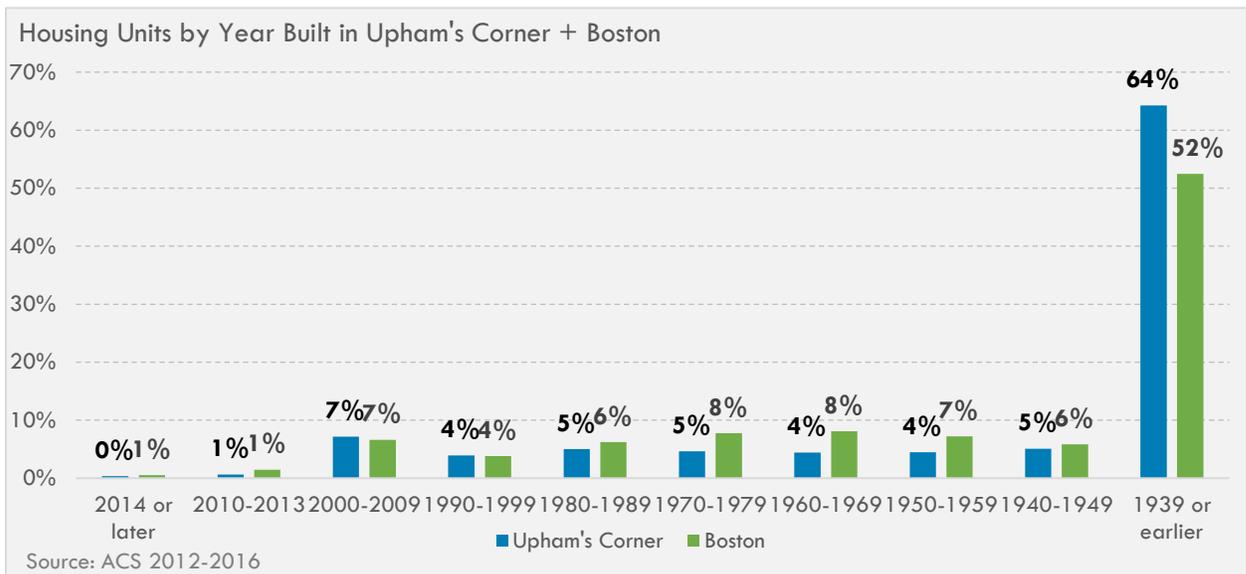
HOUSING STOCK

There are approximately 6,199 housing units in the Upham's Corner neighborhood, approximately 9% (500 units) more than there were in 2010. This area has seen more new development than Boston overall, which experienced a 3% increase in the housing supply during the same time period. About 91% (5,628) of units are occupied, while 9% (571) are vacant. The 9% vacancy rate is slightly higher than the 7% recommended to maintain stable housing prices, and has remained constant since 2010.¹¹¹ This may mean that residents have an easier time moving within or to Upham's Corner, and indicate a weaker housing market at this time.

Upham's Corner has a variety of housing types even though housing structures with three-to-four units make up 50% of the total supply, double the rate in the City of Boston. Only 12% of the neighborhood's housing units are in structures with more than 10 units, compared to 32% in Boston. Approximately 64% of housing units in Upham's Corner are in structures built in 1939 or earlier, higher than Boston's 52%.¹¹² Older, small-scale multifamily structures in the neighborhood are more vulnerable to condominium conversions and teardowns, in which case they are often replaced with newer, more expensive housing.

¹¹¹ According to the Dukakis Center for Urban and Regional Policy, and general vacancy rate trends from the Joint Center for Housing Studies and HUD's Office of Policy Development and Research.

¹¹² ACS data is based on estimates, and may not reflect current building trends.

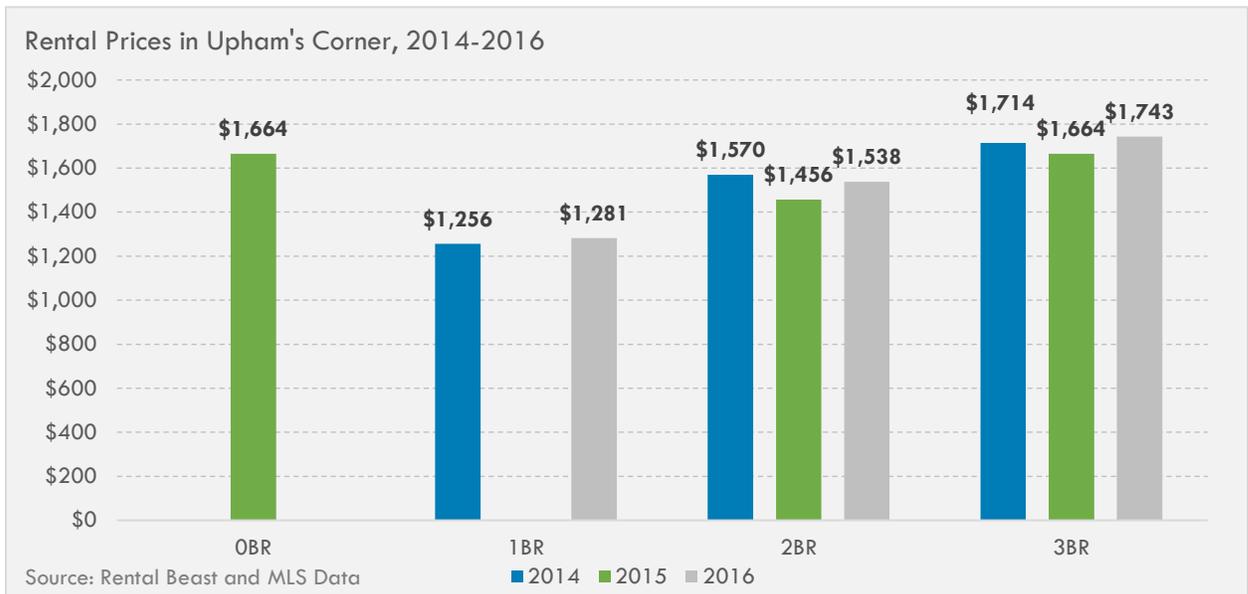


HOUSING MARKET

The percentage of renters in Upham's Corner is high, and remains unchanged since 2010. An estimated 67% (3,790) of households are renters, compared to 33% (1,838) homeowners. A majority of households in the City of Boston also rent: 65%. Rental prices in Upham's Corner have remained relatively constant since 2014, indicating price stability. Data from Rental Beast and MLS¹¹³ indicate that the 2016 monthly rent for a one-bedroom apartment was \$1,281, a two-bedroom was \$1,538, and a three-bedroom was \$1,743.¹¹⁴ Renter households, particularly those with lower incomes, living in market-rate units can be less housing-stable in inflating markets.

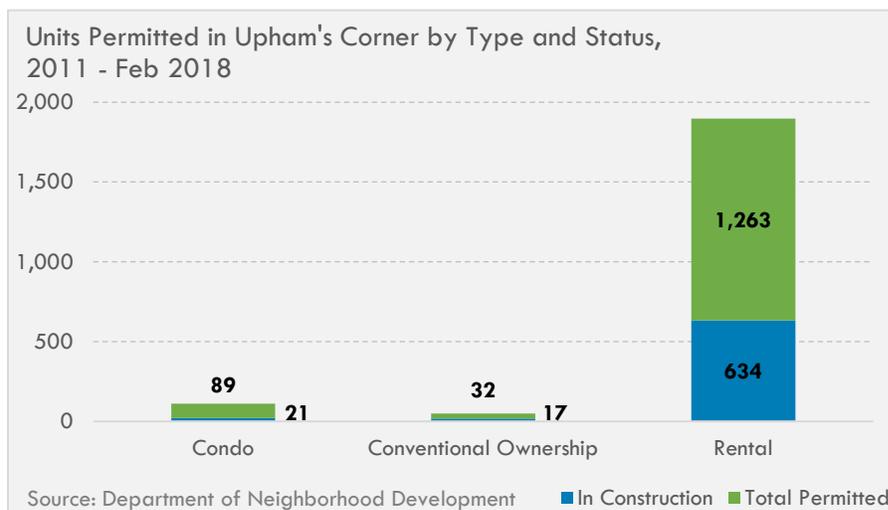
¹¹³ Unfortunately, rental data for Upham's Corner is unavailable prior to 2014, and there are not enough entries for studios and 1-bedroom apartments to consider these units.

¹¹⁴ Adjusted for inflation.



DEVELOPMENT PIPELINE

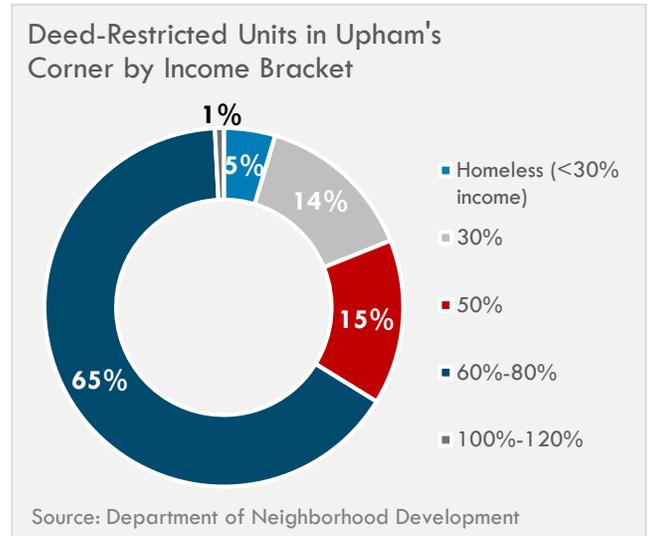
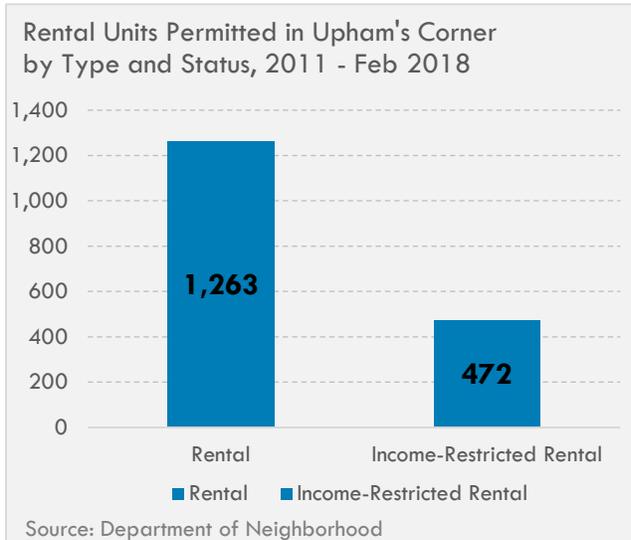
From 2011 to February 2018, 1,380 new units were permitted in Upham's Corner. Of these, approximately 711 housing units have been built, while another 669 are under construction. The large majority of new units are rentals: 92% (1,263) compared to 6% (89) for condo ownership and 2% (32) for conventional ownership. It is important to note that 37% (472) of the new rental units are deed-restricted for eligible low- and moderate-income households.



DEED-RESTRICTED AFFORDABLE HOUSING

The neighborhood of Upham's Corner has a high number of deed-restricted housing units. Generally, households living in permanent deed-restricted homes are at the lowest risk of displacement, as their rental expenditures are tied to their income. There are 1,398 deed-restricted units for rent and homeownership in Upham's Corner. The deed-restricted units make up about 23% of the neighborhood's 6,199 total housing units. Approximately 89% (1,240) of deed-restricted units are

rentals, while the remaining 11% (158) are homeownership. In addition to deed-restricted housing units, there are 367 households with rental vouchers in Upham's Corner.¹¹⁵ As these rental vouchers are 'mobile' and not project-based, the units they live in could see serious cost increases upon turnover.



¹¹⁵ Households with a housing voucher have stabilized rents that are tied to their income, not market forces.

APPENDIX E: COMMERCIAL DISPLACEMENT INDICATORS SOURCE LITERATURE

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“Affordable Space: How Rising Commercial Rents Are Threatening Independent Businesses, and What Cities Are Doing About It.” Olivia LaVecchia and Stacy Mitchell, Institute for Local Self-Reliance, April 2016.

“Boston Small Business Plan.” Mayor Martin J. Walsh, City of Boston, March 2016.

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“Community + Land + Trust: Tools for Development without Displacement.” Peter Sabonis et al., The Baltimore Housing Roundtable.

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“Sec. 303.1. Formula Retail Uses.” San Francisco Planning Department.

“Summary of Commercial Affordability Advisory Committee Recommendations.” City of Seattle, September 28, 2016.

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