

EXHIBIT G

(CITY OF STAMFORD REQUEST FOR PROPOSAL NO. 711)



COLLECTIVE FOR
COMMUNITY, CULTURE
AND ENVIRONMENT

Revised Draft Scope of Work
South End Neighborhood and Historic Preservation Plan, Phase 1
4/25/2017

The Collective for Community, Culture and Environment team understands the assignment to have 5 essential components:

1. Deep engagement of a diverse group of residents and stakeholders;
2. Strategic analysis of options and questions to identify and gather the information that is most needed to make good decisions;
3. Dialog and cultivation of a shared “no regrets” commitment to an equitable and exciting vision for the future of the South End, one that serves its communities and the city as a whole;
4. Imaginative plan that embodies that vision, backed by the creative and technical tools and strategies that will realize it;
5. Priorities for infrastructure investments and areas for further study.

The Collective for Community, Culture and Environment, Level Infrastructure, PennPraxis and Larisa Ortiz Associates will deliver the broad scope and lean budget of the South End Neighborhood and Historic Preservation Plan with a “brain trust” approach that will allow us to help the City identify key areas of leverage, and focus the inventory, planning and design effort on a narrower and deeper set of topics and products that will contribute most to a shared vision and implementation strategy, and that will have the greatest impact on displacement, heritage loss, equity, quality of life and economic vitality in the South End.

We understand that the first phase of work includes the preparation of a detailed scope of work for the South End Neighborhood and Historic Preservation Plan based on scoping discussions with the client, review of all available material to assess gaps in critical information, and interviews with the key stakeholders. We will adjust the approach we propose here, and work with a high degree of flexibility to respond to the City’s needs and the interests of stakeholders, as they are discovered through the process.

“Optional Scope Items” beyond the base fee are noted in the task descriptions. We propose to allocate most of the effort to engagement (30%) and the development of a South End Action and Implementation Plan which will articulate a vision and support it with highly instrumental, coordinated, implementation plans in the areas of greatest concern and opportunity (50%). Our proposed tasks are outlined in brief text descriptions of each task. For clarity, topic-specific work plans for Level, Penn Praxis, and Larisa Ortiz Associates are outlined separately, even though all team members’ Engagement, Analysis, and Plan work will be shared, debated, and integrated in a coordinated set of conversations, and ultimately, a coordinated South End Action and Implementation Plan.

PHASE I: ENGAGEMENT (30% OF SCOPE)

We understand the success of this planning effort is fully dependent on engagement of the diverse people and groups invested in the future of the South End. The same Collective personnel who lead the engagement effort will also lead the planning analysis and strategy components of the project, in close collaboration with the design team to ensure that engagement is not a tack-on plan marketing effort but the center of our work to help the South End and City form a strong plan for development and preservation.

The Collective’s engagement work, outlined below, will be fully coordinated with the engagement work that will be performed by Level Infrastructure, Penn Praxis, and Larisa Ortiz, outlined on the subcontractor work plans that follow.

TASK 1A Steering Committee:

The Collective team’s conditions analysis and planning process will be grounded in the expertise of actively engaged local stakeholders and regular input of a Steering Committee, advising the City Land Use Bureau and the team. In consultation with the Land Use Bureau, the Collective will establish a Steering Committee of 10-15 stakeholders, including advocates, preservationists, public officials, and others who will lend their knowledge of local context, concerns, organizations, and dynamics to the study team and City. The Collective proposes a schedule of six bi-monthly meetings of the Steering Committee, with the possibility of more frequent meetings, if useful. The Collective planning team will maintain communication with Committee members between meetings, if desired by the City. The Collective team will share its work in progress with the Steering Committee, and solicit feedback.

TASK 1B Stakeholder Interviews:

The Collective will develop, with assistance of the Steering Committee and City, a strategy to identify and engage 20-25 stakeholders in individual interviews at the start of the project to ensure that a broad spectrum of perspectives and interests, across multiple sectors. (Level Infrastructure, PennPraxis and Larisa Ortiz Associates will be involved in this interview process, as outlined in the subconsultant work plans.) These might include residents, business owners, developers, preservationists, affordable housing advocates, educators, cultural organizations, health care and service providers, and faith-based and youth groups. Active participants in a planning process, especially one built on respect for their time and community expertise, are more likely to remain engaged and commit to plan implementation. A preliminary outreach and participation program will be presented for discussion and approval at the first Steering Committee meeting. Incorporating stakeholders' knowledge of existing conditions and local history is essential to developing a plan that imagines a socially, economically, environmentally, and culturally vibrant South End and has broad support for implementation.

1C Social Media and Project Website:

In the first six weeks of the project, with insight gained from stakeholder interviews and the first Steering Committee meeting, the Collective design team will create an attractive and clear project website as a medium of communication about all phases of the project with a broad audience. We will use digital outreach tools and social media to increase interaction, availability of information, and awareness of opportunities for input at public forums and in smaller meetings with the Collective team.

1D Public Forums:

The Collective proposes 3 major public forums to create openings for local residents, businesses, and other stakeholders to provide input to the consultant team, as well as review and comment on the team's analysis and the draft and final South End Action and Implementation Plan. In the first forum, participants will be guided to articulate their ideas and desires for the South End, and any possible ingredients for a neighborhood vision. The consultant team will present the objectives of the planning process, information and the team's preliminary analysis, and frame a series of questions. The Collective's engagement team, which includes Spanish-speakers and sign language interpreters, will engage participants in exercises to identify strengths, weaknesses, opportunities, and threats. The team will design activities that, informed by the SWOT, elicit participants' ideas and identify points of consensus, broad agreement, tension, or dissention. The team will summarize the forum findings in a report that will be shared with the Steering Committee.

At the second forum, the team will present its analysis work (outlined in the phase II work plan) and a draft, or perhaps alternative, development scenarios that respond to interviews, Steering Committee meetings and ideas developed during the first forum as well as information gathered and ideas generated by the team. Each of the key action planning areas: Land Use, Community, Transportation and Infrastructure, and Historic Preservation—will be discussed in relation to potential visions and development scenarios for the South End. The Collective will facilitate discussion of the analysis, draft

scenarios and “big ideas” by residents, stakeholders and content experts. Questions, critique and ideas will be recorded, followed up, and incorporated as the team refines the Plan.

A final forum will be held to present a well-developed draft of the South End Action and Implementation Plan, focusing on both the large moves and the fine-grained strategies for implementation. The Collective will work with key stakeholder groups to examine and vet the implementation tool kits for each area.

The Collective design team will support all public forums with high-quality communication materials for meetings and web presentation. The three forums will require research and advance outreach; event facilitation and recording; and analysis, synthesis, and reporting on the results. Translation services will ensure inclusion of all stakeholders. Between the forums, the Collective or its subject expert subconsultants will follow up as needed to better understand a perspective or issue, or to test strategies with stakeholders.

TASK 1E Other Small Group Meetings:

A round of small group discussions with stakeholders and the Steering Committee will follow the second public forum and support the work of the Collective, Level Infrastructure, Penn Praxis and Larisa Ortiz Associates to shape and coordinate a set of fine-grained tools and policies to support the direction, and to prepare a draft final Plan for discussion at the third public forum. Other small group meetings will be organized by the Collective engagement and planning teams as needed.

PHASE II: ANALYSIS (20% OF SCOPE)

As we suggest in the statement of our recommended approach, the Collective believes there is a danger that the \$150,000 project budget for this phase of work may be spread too thinly among the inventory tasks, not all of which are equally consequential for dialog, decision-making, and early stage planning for action and implementation. If this happens, the results may be more diffuse than the City would like—learning and discussion but no galvanizing vision and action plan. Fine-grained inventory, which is time-intensive, may be needed to make a key decision in one area, but not in others, or down the line, but not immediately.

To conserve the budget for creative and careful development of a shared development scenario and smart action and implementation planning, we propose to use our experienced team to help the City evaluate available information and develop rapid assessment techniques—like those outlined in the Penn Praxis work plan—where necessary. The team’s principals will also further develop and cost our recommendations on Optional Scope Items to produce additional information. We propose to shift the focus of Phase II tasks from Inventory to Analysis, and to use our experience of the fine grain in many other places to assess the situation quickly and zero in on the key questions. This approach will leave us, and the Land Use Bureau, room for creative planning in the third phase of the project.

The Collective's approach to Existing Conditions Analysis is outlined below, and augmented by the coordinated Analysis work plans of Penn Praxis, Larisa Ortiz, and Level Infrastructure.

TASK 2A Review of Existing Plans and Policies

All project team members will review the many previous South End and surrounding Stamford area studies and plans through the lens of their particular areas of expertise. We will extract salient analyses and conclusions as well as maps and policy recommendations. We will collaborate with the Land Use Bureau to identify key gaps in demographic, socio-economic, health, housing, land use, and community facilities and services data. This task will be completed prior to stakeholder interviews and other Task 2 items.

TASK 2B Community Needs and Demographic Analysis

Rather than conducting an exhaustive analysis of all possible community data, we will focus on analysis of major community issues and needs. We will confer with the client to identify the City's priority concerns, and with community organizations and leaders to identify the primary issues, particularly those that have a bearing on the direction of development.

We will factor in what we learn from interviews, review of past and current planning efforts, our team's time on the ground in the South End and the issues raised at the first public forum. We will advise the client on how best to manage additional data-gathering to fill critical gaps. We will draw on sources such as the US Census and Stamford Hospital Community Health Needs Assessment, and direct observation and discussion with residents and community leaders. We imagine that block by block or cluster characterizations of land use may support decision-making. Another option we will consider is the potential for self-assessment tools such as surveys of community organizations to characterize demographics, living conditions, affordability challenges, employment and needs and neighborhood experiences of their members.

TASK 2C Land Use

The Collective will draw on the City's land use data sources, which we understand may be limited, and perform a zoning analysis. We will draw on local housing and land vacancy surveys, ownership records, and direct observation of predominant land uses to suggest a shorthand approach to ownership and land use characterization that may be less time-intensive than a lot by lot, verified land use data inventory. We will analyze past zoning changes and proposals, and consider the impact of the design of the South End's special districts / revitalization zone. The Collective will identify key land use questions and opportunities based on our knowledge of zoning and land use strategies applicable to South End concerns about displacement, retail stimulus, industrial and mixed use areas, innovation districts and the development scenarios of interest to stakeholders.

This work will be closely coordinated with the work of all three subconsultants, but particularly the heritage preservation team. We are very good at systems thinking, and we will be looking for opportunities to hybridize the typically singular goals of individual systems to produce multiple benefits and to discover reciprocities among competing land uses.

The Collective has the planning and GIS capability, and interest, to produce a full land use inventory, but this would likely be an Optional Scope Item beyond the base fee if the client is interested in the deliverables and approach we propose to the Plan phase of the project.

TASK 2D Open Space, Urban Design & Physical Assets

This task (renamed and slightly reorganized to include the urban design element of task 2G) will be performed by the Collective design team. Working together, the team's landscape architect and architect will visit all areas of the peninsula to evaluate the open space and urban design fabric of the neighborhood. We will map physical assets such as sports and boating facilities, as well as potentials for improving the physical plant of the peninsula through mobility improvements, lighting, park redesign and other upgrades to the fabric. We will consider with the planning team how design guidelines, codes and other tools might be used to augment strategic investments. This task will allow us to suggest some possible ways in which public space, urban design, mobility design, environmental graphics, wayfinding, ecology and programming might be used to support development scenarios and the Community Plan (in task 3B).

TASK 2E Transportation, Sustainability and Resiliency

The work plan for this task is described in the Level Infrastructure scope under the Analysis heading.

TASK 2F Historic Preservation

The work plan for this task is described in the Penn Praxis scope under the Analysis heading.

TASK 2G Retail Analysis The work plan for this new proposed task is described in the Larisa Ortiz Associates scope of work under the Analysis heading.

PHASE III: SOUTH END ACTION AND IMPLEMENTATION PLAN (50% OF SCOPE)

The Collective engagement and planning team, the Collective design team, and all the subject experts on the team—Penn Praxis, Level Infrastructure, and Larisa Ortiz Associates—will collaborate on the development scenario for the South End, and a unified action and implementation plan to realize that scenario. We propose to develop and integrate detailed individual action and implementation plans for 4 areas, and to connect the development scenario to one or more “big ideas” for the South End. Visualization and naming of the shared vision and its major elements is often required to build commitment to a creative, shared, long-term plan.

TASK 3A Land Use Strategies and Action Plan

The land use strategies and action plan will comprise tools and strategies needed to realize the specific recommendations included in the larger vision and development scenario for the South End. We will recommend, and vet with stakeholders and Steering Committee, specific zoning changes and approaches to design guidelines. We will identify supportive tools and procedures, with a particular concern for ensuring affordability. We will draw on strategies and tools we and others have developed in work with other communities facing a loss of affordability, rapidly changing neighborhood character, and the associated displacement of residents. We will also look to innovate and produce a new approach made from the local ingredients and ideas we find through the process.

TASK 3B Historic Preservation Strategies and Action Plan

The work plan for this task is described in the Penn Praxis scope under the Plan heading. Heritage recommendations will be closely strategized as part of the development scenario and land use action plan.

TASK 3C Community Strategies and Action Plan

The Collective engagement and planning team will work with all stakeholders, and particularly the long-time residents and their community organizations to develop a set of priorities for strategies, partnerships and investments to improve affordability, health, employment, education, open space access and environmental quality.

Rather than think of this as the community benefits agreement portion of a development plan, the Collective's aim will be to look for synergistic opportunities, places where interventions in one sphere—preservation of housing affordability, for example, or expanded fresh food retail—have the potential to improve a number of conditions, such as public safety, school attendance, or health. We will work to differentiate the roles of the public agencies and investment, and the roles of the private and non-profit sectors, to propose strategies and narratives for each. We imagine the work of Larisa Ortiz Associates will be folded into both the Community and Land Use Strategies and Action Plan. Training, education, and employment strategies that benefit the community will likely also emerge from the team's heritage and infrastructure, resilience and sustainability work.

TASK 3D Transportation Infrastructure Strategies and Action Plan

The work plan for this task is described in the Level Infrastructure scope under the Plan heading. Infrastructure proposals will be integrated into the layout plan and vision (Task 3E). The action plan will include prioritization of infrastructure investments and areas for further study, and outline capital planning considerations.

TASK 3E Vision

The Collective proposes to add a task to create a vision statement of the rationale behind the agreed upon development and preservation scenario. We propose to produce a vision statement, layout plan and visualization for a shared concept for the future of the South End. This will serve as a visual executive summary of the rationale for the strategies, compromises and commitments that follow in the action and implementation plans. The team will integrate design, planning and systems thinking to articulate what the South End and City mean by a contemporary walkable cultural landscape or an innovation district, or other catalytic framing ideas for the preferred development and preservation scenario. This cover piece will help situate and propel the creative set of tools and strategies needed to realize that vision outlined in a coordinated Action and Implementation Plan that incorporates the 4 chapters (3A through 3D). The Collective design team will lead development of this work, and be responsible for layouts, branding and graphic design, and the design of a usable, catalytic document.

The Collective and its consultants have the design and planning skills to produce a full vision plan or concept plan for South End, but this would be an Optional Scope Item beyond the base fees. We understand that the City's focus is on developing—not simply listing—the tailor-made strategies and tools for implementation of the vision.

PENNPRAXIS ROLE AND WORK PLAN

The RFP signals that the City of Stamford sees historic preservation as an important element of action and implementation planning for the South End. Redevelopment planning must account for immediate economic, environmental and community change, and for emerging opportunities like the innovation district. It must also project the City and community's long-term goals of social equity, community character and sustainability.

Penn Praxis begins with the cultural landscape perspective: we must understand the place holistically and as it has evolved over time; connect historic resources to contemporary and future needs, not isolate them; and center our analysis on how the place does, and should, change, not only on what has not changed.

By examining the inherited built environment, preservation focuses attention both on significant individual resources—buildings, blocks and landscapes—and on important connective tissue, including shared sense of identity. Historic preservation is not the dominant concern in this project, we fully understand. But historic built environments and strong and adaptable preservation strategies and policies are an important alloying element – even small amounts, added in the right places and the right times, can strengthen the whole place.

We believe the two keys to effective historic preservation planning are:

- 1) Building a base of information (spatiality, historical evolution, regulatory environment, current and projected conditions) and
- 2) Integrating cultural heritage analyses, goals and outcomes into overarching planning strategies and specific development decisions.

The historic environment has clearly contributed to the distinctive character and value of the South End. We see our role as finding ways to add value in the future by enhancing the historic built environment.

Phase I: Engagement

Penn Praxis will confer with the City about local heritage knowledge and resources and lead the Collective team's stakeholder interviews with the City's Historic Preservation Advisory Commission and civic organizations like the Historic Neighborhood Preservation Program. In the course of stakeholder interviews and conversations with the City, residents and advocates, the Collective team will look to understand the value of specific historic buildings and sites like the cemetery, and broader district character, from multiple perspectives. We will review with the City Land Use Bureau our understanding of preservation codes of the Connecticut Department of Transportation, Connecticut Housing and Finance Authority, and the Connecticut Historic Preservation Office, as they relate to transportation

improvements and other redevelopment issues in the South End. We will add local experts to the team at the discretion of the Land Use Bureau, if our understanding of codes is incomplete.

Phase II: Existing Conditions Analysis

Penn Praxis will review all existing plans, policies and data, including (as outlined in section 2e of the RFP), surveys of South End existing historic structures, view sheds and loss of historic structures since the establishment of the Historic District. Penn Praxis proposes to use Character Study Project methods to cost-effectively generate needed information about the historic resources. A Character Study Project (CSP) approach involves design of a survey method at the block / building-group scale (as opposed to the traditional property-by-property scale, which is very time-consuming and beyond the level of detail needed for strategic decisions).

We propose to use CSP to estimate current conditions remotely, use mostly digital data that is analyzed in GIS, in order to direct a highly efficient on-the-ground survey. We would field-check and enrich the data using teams of graduate students under Randy Mason's direction, to carry out a speedy, inexpensive and high-quality survey.

The team will deliver a GIS-based inventory and compilation of existing data and conditions with a focus on key areas of concern, a narrative summary of history and evolution of the South End; and an analysis of information gaps for potential further study.

Following the interviews and research phase, Penn Praxis will document the use and integration of current preservation tools and policies, including regulations, incentives, legal tools, institutional roles, stewardships and partnership tools. The preservation consultants will filter these findings through the issues and potentials identified by the whole project-client team, and articulate their analysis of the strengths and weaknesses of the current toolbox.

Phase III. Strategies and Action Plan

Penn Praxis will develop a cultural heritage sensitivities analysis, mapping the priority preservation sites and issues, in relation to overall project goals. With input from the client and stakeholders, Penn Praxis will collaborate with the Collective team to develop a Preservation Action and Implementation Plan that proposes a tailor-made set of preservation tools that are fully coordinated with the team's recommendations in other areas. We understand that the City is already savvy about preservation approaches and that creativity will be required on our part to bring new insight and innovation to a toolbox that might include:

- Vision for the future of the South End that is rooted in its heritage--an extension or "re-branding" of the neighborhood identity that re-frames or focuses preservation efforts
- Transfer of Development Rights

- Conservation districts—bespoke to a district, typically to guide new development rather than regulate historic building
- Update of the local historic district—review of changes proposed to listed buildings; could include ranked / tiered listing corresponding to different levels of regulatory control
- Rehabilitation tax credit strategy based on Federal program for 20% credit for commercial projects located in National Register of Historic Places listed districts or on Connecticut program for 25% of the rehabilitation cost
- Various kinds of tax abatement
- Connecticut Trust for Historic Preservation Revolving Loan Fund
- Streamlined permitting
- Demolition delay ordinance to create a window of time for deal-making with a buyer/developer

LEVEL INFRASTRUCTURE ROLE AND WORK PLAN

The RFP outlines diverse concerns related to infrastructure analysis and planning, emphasizing the need for transportation problem-solving advice, thoughtful recommendations on the prioritization of infrastructure investments, and assistance to anticipate additional infrastructure feasibility work and capital planning considerations connected with identified priorities. Infrastructure design and planning are intimately connected with many of the South End opportunities the team has identified in our Project Approach including balancing and optimization of all modes of transportation and mobility, high-performing streetscape that improves walkability and incorporates green infrastructure for shade and water and air quality, sewerage and MS4 implementation, energy and climate resilience, high speed internet and other infrastructure to stimulate the growth of an innovation district.

Phase I: Engagement

Level Infrastructure will confer with the City about its infrastructure questions and goals. After reviewing all of the relevant transportation and infrastructure studies and plans, Level will lead the team's stakeholder interviews where technical expertise is needed to fully engage and interpret stakeholder interests, or to evaluate systems risks. We will interview the City's transportation engineering consultants and DOT planners, as needed, to confirm our understanding of the many transportation studies recently completed and underway. Level will review with the City Land Use Bureau specific questions concerning proposed widening of Atlantic Street and bridges, traffic analyses, connectivity to and around the Stamford Transportation Center, and the design of main corridors along Washington, Atlantic and Canal. Level will engage the key players in the Stamford 2030 planning effort to assess the progress and direction of resilience planning efforts, including evaluation of the sufficiency of the current flood control system as sea level rises over the next 50 years. The team's aim will be to identify all of the major infrastructure issues, with a particular focus on transportation, sustainability and resilience. A second wave of engagement will likely be required to discuss and develop Level's preliminary recommendations on infrastructure priorities.

Phase II: Existing Conditions Analysis

Level Infrastructure will review relevant studies and identify any critical gaps in the information needed to make sound decisions. Depending on the amount of work required, Level will outline the most efficient methodology for closing those gaps, and perform the inventory and analysis work, as Optional Scope Items.

The team will deliver a succinct analysis of infrastructure in 3 main areas, and an outline of other infrastructure considerations and opportunities. Level will advise the Collective and the City on the development of a vision for the peninsula in these 3 areas, including specific measures like the optimal placement of bikeways or water management features.

- 1) **TRANSPORTATION:** Level's transportation planning approach will be based on ensuring the public street right-of-way is allocated appropriately for the needs of the community and city. Street space will be re-balanced by assessing needs for private car, public bus, shared vehicles, trucks, bicycles, stormwater management, pedestrian-oriented sidewalks, and street-facing community retail establishments. Much can be done, simply and at low cost, by re-striping and rethinking spatial allocations based on the groups of people at the center of mobility design. When the goal of connecting the South End and downtown Stamford is approached with mobility strategies such as bicycle networks, pedestrian-friendly street corridors, improved bus service and enhanced street ecology, a new street character that is different from existing conditions based on priorities of decades ago, often emerges. To ensure commercial businesses and residents are well-served, impacts from trucks and service vehicles will be mitigated.
- 2) **WATER AND SUSTAINABILITY:** Principles of sustainable planning will be the starting point for the technical investigations for the concept plan. Level designs stormwater management systems based on ecological principles and the belief that bringing water into community fabric brings people closer to the dynamic, watery nature of coastal life. Exposing, reusing, and recycling rainwater wherever possible will reduce the load on the South End's existing stormwater infrastructure and reduce flood risk. Energy will be studied through new technologies for street lighting, and orientation of buildings to passively mitigate solar gain and harness prevailing wind direction. If appropriate, concepts for district energy networks based on renewable energy can be studied. During emergencies and regional power outages, providing enough power for communication systems to function and basic needs to be met will reduce community risk and increases community cohesion.
- 3) **RESILIENCE:** The technical aspects of Level's resilience analysis will begin with understanding a wide variety of threats including, but not limited to, coastal flood risk, rain event flood risk, heat risk, winter storm risk, power outage, communication outage, and other man-made and natural events. Level looks at both the probability of such events as well as the degree of impact of the event. It is important to understand who in the community will be impacted from shocks and stresses because low- and moderate-income residents are disproportionately displaced when a shock occurs. The analysis will incorporate ways to reduce the impacts of these events, particularly to the residential community. The Collective's planning team will incorporate Level's recommendation on risk reduction and resilience building strategies such as disaster preparedness, community cohesion, and accessible information into the Community Strategies and Action Plan. We believe Level's technical and community-centered approach to resilience planning will help the City identify resilience issues and options, and appropriately prioritize infrastructure investments and other kinds of measures.

Phase III: Strategies and Action Plan

Following discussion of the above analyses with the City, Collective and the Steering Committee, Level will prepare a draft Infrastructure Strategies and Action Plan that encompasses the Transportation Plan.

Level will review and coordinate their findings and recommendations with the Collective design and planning teams, and explore big ideas for the future of the South End that have an infrastructure dimension. Level's transportation strategies will be incorporated into a conceptual layout of mobility modes that is incorporated into the South End concept plan.

With input from the client, steering committee and key stakeholders, Level will collaborate with the team to develop a revised Infrastructure Strategies and Action Plan that includes infrastructure consultants' recommendations on the prioritization of infrastructure investments, and areas for further study. Level will work with the City to outline capital planning considerations and next steps including approaches to funding or financing key investments.

LARISA ORTIZ ASSOCIATES ROLE AND WORK PLAN

The Collective believes the City may wish to enlarge the scope of work around retail strategies for several reasons. Displacement or growth and diversification of commercial businesses in the South End community will have a significant impact on the economic health and employment of low-income residents, and on the affordability and livability of the neighborhood for all residents. Retail has a huge effect on street life, circulation patterns, use mixes, crime, and cultural life and expression of who lives there. Commercial activity has a substantial influence on the attractiveness of an area to workers and companies in the tech and innovation sector. Retail can also build community, reduce the isolation of the neighborhood by creating destinations, or enliven specific areas within the neighborhood. Larisa Ortiz Associates, our retail development strategists, have deep experience with the dynamics of transitioning commercial markets similar to that of the South End, including how the business environment can be changed through new investment and shifts in policy. The base scope of work will help determine the utility of more fine-grained analysis and implementation planning.

Phase I: Engagement

Larisa Ortiz Associates and the Collective will confer with the City about the business environment and codes, including past efforts to attract, support or subsidize retail, concerns of downtown merchants about competition, and shifts in retail strategy and market that might accompany development trajectories of interest, including the innovation district. Larisa Ortiz Associates (LOA) will review planning documents and interview key stakeholders identified by the City Land Use Bureau and Collective. In consultation with the City, LOA will evaluate the usefulness of a focus group session to explore retail issues.

Initial Phase II: Existing Conditions Analysis

LOA will review all available market data and make a site visit to conduct a physical analysis of the district to identify key strengths as well as barriers to retail sales. The LOA team will look at characteristics that define the business environment, including spatial conditions, safety, visibility, access and business and residential density, and anchors and destinations, key retail strips and hubs--current and emerging, including the Pitney Bowes area.

Larisa Ortiz Associates will use their observations, findings from meetings and available data to identify additional information that would be useful in developing tools and an implementation plan (along the lines outlined below). They will also prepare a preliminary analysis of how the South End neighborhood might be better positioned in the marketplace, and what kinds of improvements are critical to retaining and attracting businesses.

Phase II: Fine-grained Retail and Market Analysis (Optional Scope Item)

A fine-grained approach to market analysis, based on demographic data, will allow LOA to capture the dynamics and diversity that do not show through when broad-strokes data are used. Consultants would use the data to characterize “sub-districts” within the trade area.

With additional support, LOA will examine strategic positioning and psychographic data. Psychographic data from ESRI Business Analyst is useful for creating a snapshot of who is living within a trade area and what their shopping habits are. LOA will couple that data with a proprietary tool called the Strategic Positioning Matrix, which plots these psychographic profiles to identify business types that are likely to be receptive to the City’s efforts to create and communicate new opportunities in the market.

LOA will develop its market analysis to identify opportunities for new retail, and existing retail clusters that can be strengthened. While many market analyses simply present the supply and demand and retail gap or “leakage” in each retail category, LOA will take the City and Collective a step further to understand what the numbers really mean, and to project how many new businesses and square feet of new retail the area can support with additional development and in what retail categories.

Phase III. Retail Strategies & Action Plan (Optional Scope)

Based on the findings of the above analyses, LOA will craft specific recommendations for how the South End neighborhood should be “positioned” in the marketplace (i.e. target customer, merchandise mix, price point, etc.) and what kinds of investments and strategies are needed to retain and attract the mix of businesses that will serve community needs and contribute to the life of the neighborhood. LOA will coordinate with the Collective to develop an implementation plan that provides direction and guidance on what role the City can and should play, given its capacities and resources as well as the broader political dynamics. We will recommend areas where the City must partner with the primary actors – the property owners, leasing professionals and the existing merchants – in order to realize the retail strategy.