



# Rapid Recovery Plan

2021

**Town of Upton**



# Acknowledgements



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

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

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

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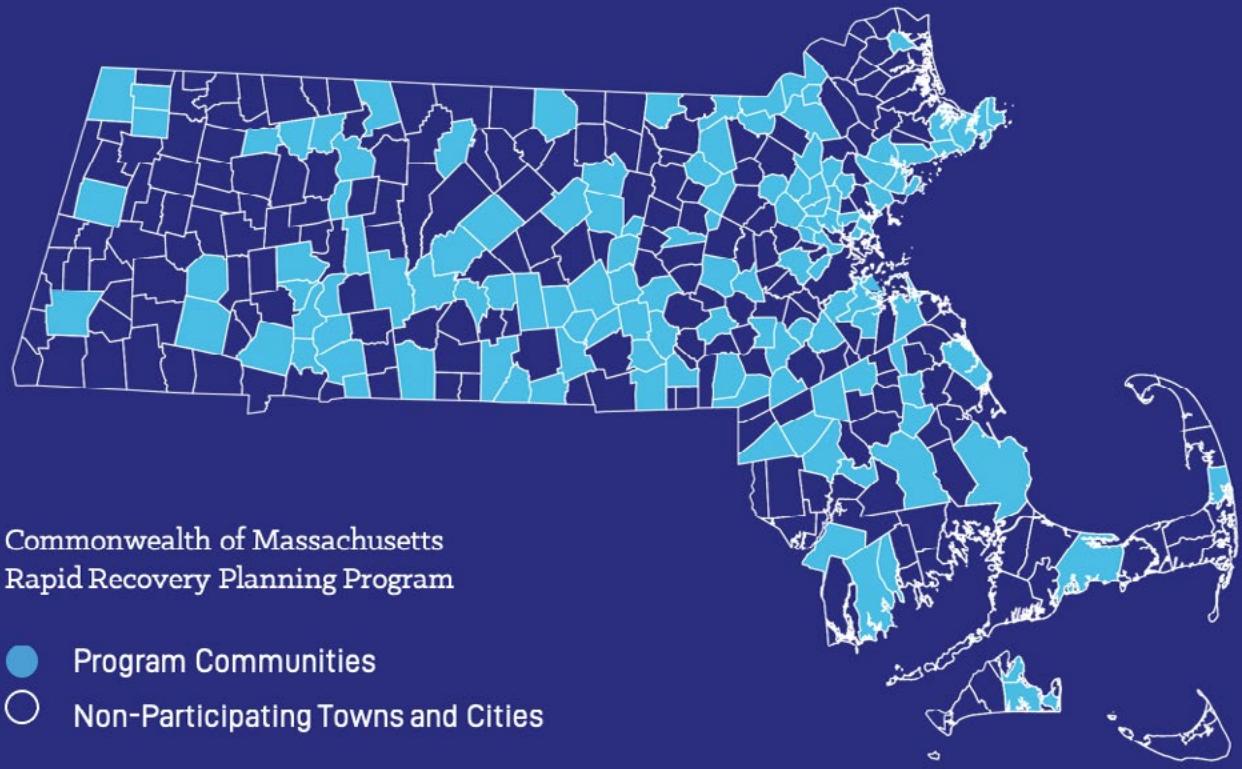
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## 125 communities participated in the Rapid Recovery Plan Program

52 Small Communities  
51 Medium Communities  
16 Large Communities  
6 Extra Large Communities

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



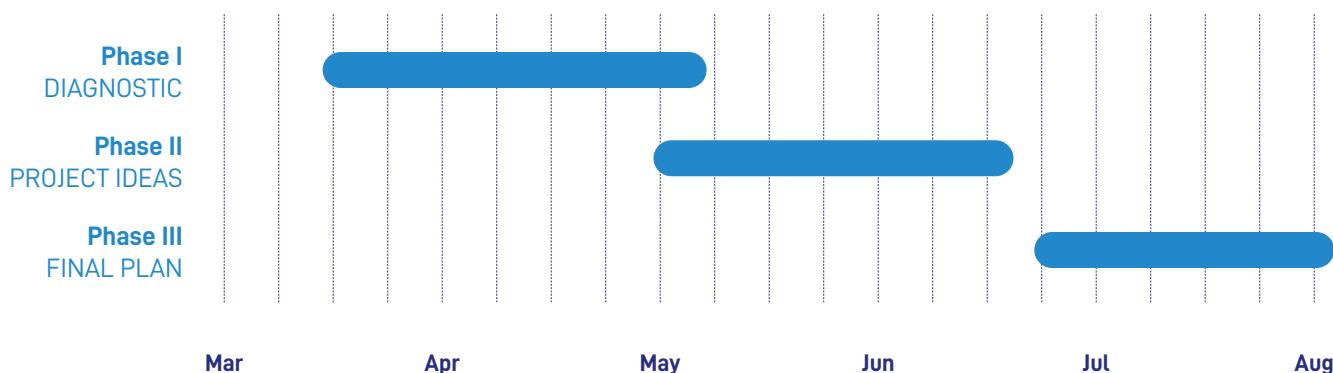
# Rapid Recovery Plan (RRP) Program

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

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

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

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



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

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

## Rapid Recovery Plan Diagnostic Framework



Who are the customers of businesses in the Study Area?

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

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

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

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



Public Realm



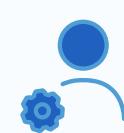
Private Realm



Tenant Mix



Revenue & Sales



Admin Capacity



Cultural/Arts



Other

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## Executive Summary

# Executive Summary

## A Town with a Clear Vision

Upton is a quaint New England town in the heart of the Blackstone River Valley in Worcester County, Massachusetts. First incorporated in 1735, Upton has grown into a small but vibrant community of 8,012 residents. The town is well-connected regionally, not only forming an important part of the Blackstone Valley and Worcester County communities but even feeding into the greater Boston metro area. However, Upton is more than a commuter suburb: the town has a unique character driven by engaged residents, thriving local businesses, and a rich historical feel complemented by modern amenities.

Upton Town Center is the historic and commercial heart of Upton. Centered around Route 140/Main Street and stretching down several side streets, most of the Town Center is also part of the Upton Center Historic District, which contains such landmark buildings as the recently-renovated Town Hall and the Knowlton-Ristein building, a former church that is currently the home of the Upton Library and Historical Society museum. The nearby former Holy Angels Church is another iconic building currently slated for redevelopment. Community institutions such as the VFW (Veterans of Foreign Wars) offer events and public gathering spaces in the Town Center. Established local businesses like the Upton House of Pizza and Country Sooper add a commercial flair to the historic district. Finally, emerging amenities, led by the new Rushford & Sons Brewhouse, attract new visitors to the Town Center.

In 2019, Upton released its comprehensive Town Center Vision Plan that outlines a bold vision for the future of the district. At the heart of the reimagined Town Center is the Upton Community Center, which will be located on Town-owned land adjacent to the VFW and will serve as a node for public gatherings in Upton. Outside the community center, Route 140 will be redeveloped in partnership with MassDOT. The new streetscape will include sidewalks, a central roundabout, and other amenities to improve traffic flows for vehicles, pedestrians, and cyclists. As Upton leaders work to implement this Vision Plan, they hope to reimagine the Town Center as a vibrant, pedestrian-friendly district with thriving commercial attractions and connections to local history and natural beauty.

With several large-scale projects in the pipeline through the Vision Plan, the Town Center's greatest current need is for auxiliary projects that move the area towards this vision through smaller steps. The five projects proposed in this report are intended to do just that: provide the Town with short-term, relatively low-budget improvements to make Upton's Town Center into a walkable, vibrant commercial and historic district.

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## Diagnostic

# Key Findings



## The Town is family-oriented and highly educated

Upton is a family-oriented, middle class community in the heart of Worcester County. The population of 8,012 residents is mostly comprised of children and middle-aged adults between the ages of 45 and 65. Upton residents are well-educated: more than half of adults have a Bachelor's degree or higher. As a result, the median household income of over \$130,000 is well above the regional figure of \$73,500. About 93% of Upton residents are white, while roughly 3% are Asian. There are approximately 4,330 jobs in Upton; many residents commute to cities such as Milford, Worcester, and even Boston for work.

The Upton Town Center has similar demographics to the town as a whole among its 75 residents. It is also a family-dominated community with low numbers of young adults and elderly residents. The median income of about \$108,000 is lower than the town as a whole, although residents of the Town Center are even more highly-educated, with more than two-thirds holding a Bachelor's degree or higher. Just over 95% of Town Center residents are white.



## The Town Center lacks amenities and attractions for pedestrians

The Town Center is described by Town leaders and residents alike as an area that is unfriendly to pedestrians. High traffic speeds along Route 140, combined with insufficient pedestrian paths and crossings, serve as major barriers to walkability. Side streets are quieter, but lack adequate sidewalks, road crossings, lighting, and wayfinding signage for pedestrians. Public spaces such as the Town Common have few critical amenities, such as tables and benches, lighting, greenery, and art. Many businesses and other structures are in need of facade improvements and aesthetic upgrades, including artistic and wayfinding elements. Given the existing conditions, Upton residents feel that the Town Center is a car-centric district, often driving between proximate, adjacent businesses.

The Town Center is also challenged in finding a use for the array of Town-owned parcels along Route 140, including the Holy Angels Church and the Knowlton-Risteen building. This area is currently underutilized; several buildings and lots sit vacant, while others are key targets for physical and economic upgrades. The Church is a focus area: the Town would like to preserve the historic building but has had trouble finding a willing partner to shoulder the large, required rehabilitation costs. The Town released an RFP in March 2020 for the redevelopment of this area, but received no responses, largely due to the onset of the COVID-19 pandemic. Identifying a future use for these parcels and selecting a development partner are key needs in the near future to activate this district.

Despite these conditions, the Town Center has strong foundations in place to become a walkable district. Planned upgrades by MassDOT along Route 140 and on side streets through the Complete Streets program will greatly improve walkability with new sidewalks and street crossings. Other attainable, pedestrian-friendly streetscape improvements include adding wayfinding signage, greenery and lighting, and public arts. With upgrades like tables and benches, lighting, and pedestrian paths, public spaces like the Town Common and Center Brook can become attractive pedestrian amenities. The business community includes established and new merchants, and ample space exists to attract more amenities. Finally, the forthcoming community center will serve as a physical hub for the Town Center. needs in the near future to activate this district.



## The Town Center needs to improve public spaces and storefronts

Across Upton, there are 227 businesses. Services comprise the largest industry subset with 84 businesses, while 37 businesses are retail establishments and 33 are in the construction industry. Many of Upton's businesses are home-based and do not have a physical storefront; the Town is aware of these businesses' presence and is interested in improving engagement with them. Upton Town Center specifically has 16 total businesses. Ten of these businesses are service-based, while five are retail establishments and one is a construction business.

Ten of the 16 Town Center businesses responded to the LRRP business survey in March and April 2021. Six of these businesses are microenterprises with fewer than five employees. Overall, the Town Center weathered the COVID-19 pandemic well, with no area business closures. However, all ten survey respondents indicated some level of economic impacts from the pandemic, including reduced hours or capacity, temporary shutdowns, reduced revenue, and/or additional health and safety-related costs. At the time of the survey, eight of the ten businesses were operating under reduced capacity, while one was fully operational and one was temporarily closed.

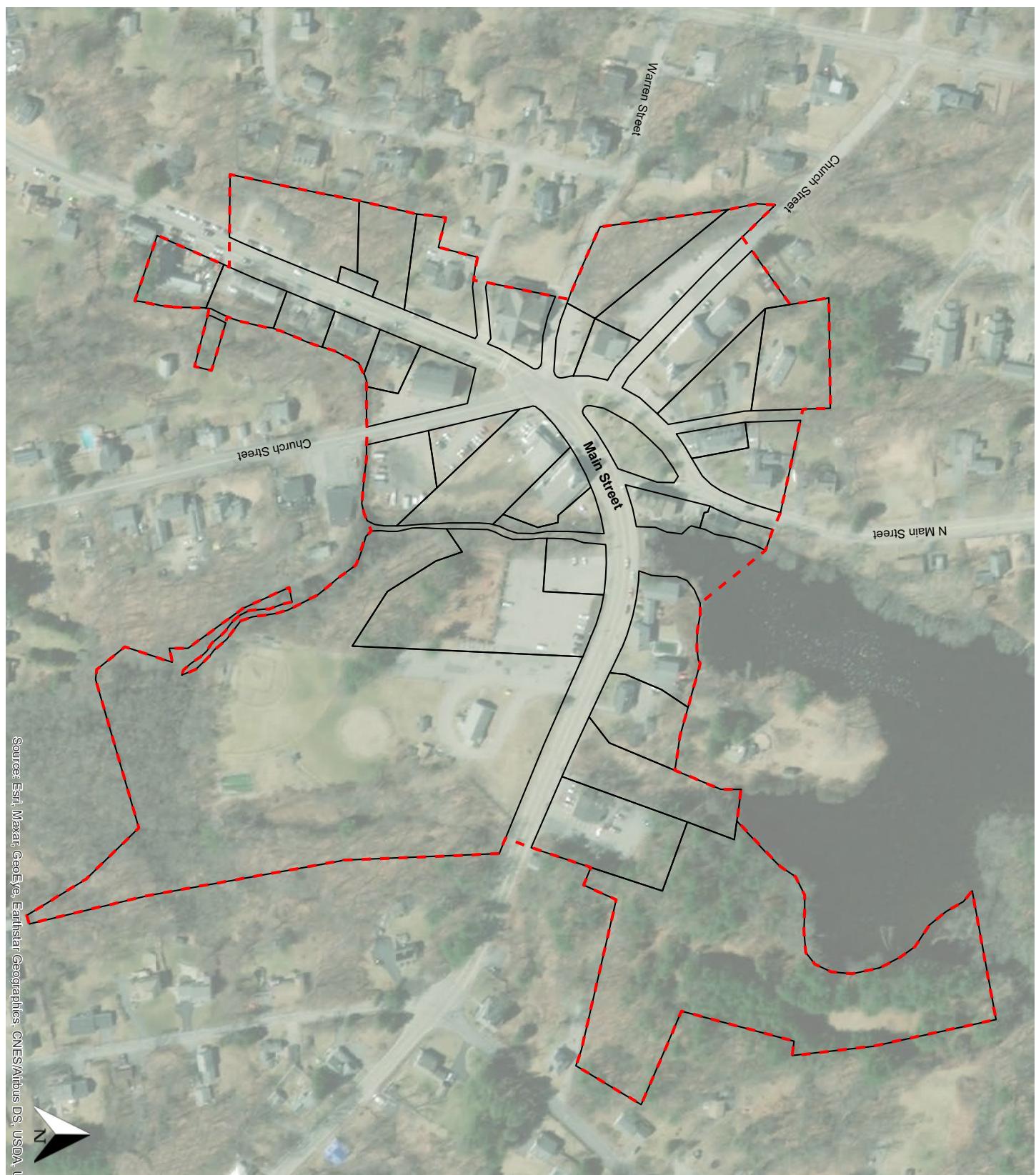
Generally, Town Center business owners expressed satisfaction with the local regulatory environment, as well as the density of complementary uses in the Town Center. However, many indicated that upgrades to the physical environment are needed, including storefronts and facades, sidewalks, signage, and public spaces. Six businesses additionally responded that access and safety are concerns for their employees and customers. Eight out of ten businesses expressed an interest in receiving some form of financial support from the Town for initiatives such as facade improvements and online marketplace support.



## The Town has a clear vision for the future

In 2019, Upton released its Town Center Visioning Plan, which outlines a comprehensive vision for the future of the eponymous area. Built around improved walkability and increased amenities for visitors, the Vision Plan proposes upgrades to the roads, pedestrian walkways, businesses and storefronts, public spaces, and more. Existing buildings and amenities, including the Holy Angels Church and other Town-owned land, will be targeted for redevelopment. Major infrastructure improvements will be coordinated in partnership with MassDOT and the Massachusetts Complete Streets program. At the heart of the improved Town Center will be a brand new community center that will serve as a hub for social and economic activity. The Vision Plan serves as a blueprint for short- and long-term change in the Town Center.

As the Town works to implement the larger components of the Vision Plan, such as road infrastructure upgrades and construction on the new community center, Town leaders emphasized the need for support on smaller-scale projects. Improvements in areas like business attraction and engagement, public space placemaking, event programming, and facade upgrades are needed to bridge the gap between existing conditions in the Town Center and the vibrant district outlined in the Vision Plan.



Map of the Upton Town Center (Study Area for this Planning Process)  
Source: ESRI, USDA, and USGS

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## Project Recommendations

# Build Pedestrian Bridges Across Center Brook

<b>Category</b>	 Public Realm
<b>Location</b>	Center Brook, Town Center
<b>Origin</b>	Town leaders identified the need for pedestrian bridges to connect existing and future Town Center assets during the Karp Strategies team's site visit to Upton.
<b>Budget</b>	 High Budget (Above \$200,000): A bridge would likely cost approximately \$300,000 to \$700,000. Construction costs for 120-200 total feet of 10-foot wide bridge may range from \$180,000 to \$500,000, depending on site conditions, materials used, etc. Other costs including engineering and survey services, design, and grading may add an additional \$100,000 to \$200,000. Permitting and approvals may add cost if not done by the Town.
<b>Timeframe</b>	 Short Term (Less than 5 years): Design and construction can be completed in under five years for bridges of this size. The time frame depends on the length of the RFP process, feasibility analysis, and other pre-construction steps. Permitting will likely be the longest phase of the project.
<b>Risk</b>	 Medium Risk: This project is not likely to face political pushback due to public support, but physical barriers to construction and the potentially high cost are risk factors.
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"><li>• Number of pedestrians in the Town Center</li><li>• Pedestrian counts on each bridge</li><li>• Feedback from businesses such as Rushford &amp; Sons Brewhouse</li></ul>



An example of a small pedestrian bridge over a creek in Korso, Vantaa, Finland.  
Source: Wikimedia Commons (2021)

<b>Action Item</b>	<p>The Town may build two bridges across Center Brook to connect assets that currently do not have direct pedestrian access. One bridge would run parallel to that on Grove Street between Rushford &amp; Sons Brewhouse and the municipal parking lot. The other bridge would connect the same parking lot to the proposed Community Center and Upton VFW parcels.</p>
<b>Diagnostic</b>	<p>Center Brook currently acts as a barrier to pedestrian traffic between different assets in the Upton Town Center. The road bridge on Grove Street between the Library and Rushford &amp; Sons Brewhouse has no pedestrian access. Many customers at the brewery park on the other side of the creek and walk on the road to cross the creek and get to the brewery. There is also no direct pedestrian access between this parking lot and the VFW lot and the future locus of the Community Center and adjacent VFW lot. The lack of pedestrian bridges between these existing and future assets is a barrier to access for pedestrians and customers of local businesses.</p>
<b>Partners &amp; Resources</b>	<p><b>Implementation Partners</b></p> <ul style="list-style-type: none"> <li>Bridge manufacturers (eg. Roseke, Excel Bridge Manufacturing Co., Contech Engineered Solutions): Many manufacturing companies specialize in pedestrian bridges, including those manufactured off-site as well as traditional construction. There will be multiple options of construction partners for the Town to consider, each of which will provide varying design and costs.</li> <li>Upton DPW, Conservation Commission, and Land Stewardship Committee: The Department of Public Works and Conservation Commission in Upton can oversee permitting, environmental and commercial assessments, and other elements of the bridge construction process.</li> <li>Upton Planning Board and/or Central Massachusetts Planning Commission</li> </ul> <p><b>Implementation Tools</b></p> <ul style="list-style-type: none"> <li>Where possible, work with local construction companies and contractors for procurement and construction services. This is a way to support local businesses while simultaneously improving the public realm.</li> </ul> <p><b>Funding Sources</b></p> <ul style="list-style-type: none"> <li>US Department of Transportation (DOT) – Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grants: These grants "provide a unique opportunity for the DOT to invest in road, rail, transit and port projects that promise to achieve national objectives." (<a href="#">DOT website</a>). This funding source makes it possible for state and local agencies to get DOT funding and support for projects for which they might not otherwise qualify through more traditional programs.</li> <li>DOT – Bicycle and Pedestrian Program: The <a href="#">DOT's webpage</a> offers a list of all grants for which the Town could apply.</li> <li>Central Massachusetts Planning Commission (CMRPC): CMRPC is distributing funds from the MA Department of Public Health to 39 unaffiliated Municipal Boards of Health throughout Central Massachusetts, including Upton.</li> <li><a href="#">EDA FY 2021 American Rescue Plan Act, Travel, Tourism, and Outdoor Recreation</a>: EDA's grant can award anywhere between \$100,000 and \$10,000,000. This grant is designed to provide a wide-range of financial assistance to communities and regions to rebuild and strengthen their travel, tourism, and outdoor recreation industry through various infrastructure and non-infrastructure projects.</li> <li><a href="#">EDA FY 2021 American Rescue Plan Act, Regional Build Back Better Challenge</a>: EDA will award funds in two phases to regional coalitions who are implementing recovery projects in a wide range of areas. Phase I grants up to \$500,000 to coalitions for technical assistance developing projects. Phase II awards between \$25 and \$75 million for project implementation. This would require the Town to combine this project with others as a part of a regional development coalition.</li> <li><a href="#">EDA FY 2021 American Rescue Plan Act, Economic Adjustment Assistance</a>: This broad grant program will provide funding for communities to plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs.</li> <li><a href="#">Mass Community One Stop for Growth Grants</a>: A single application portal allows applicants to be considered for ten grant programs from three state agencies. Funding is available for planning, infrastructure, capital, and programmatic projects.</li> </ul>

## Process

1. Convene an oversight body to manage the design and installation of the pedestrian bridges. This may be an existing entity in Upton, such as the Department of Public Works (DPW), or a newly-created body.
2. Conduct research and expert consultation to gather relevant background information. Any consultant or contractor will need to know certain information up front. At a minimum, the oversight body should answer the following questions about the site conditions and desired bridge features:
  - a. What are the right-of-way restrictions for this project?
  - b. Are there any constraints imposed by environmentally sensitive or cultural resource areas?
  - c. Is the waterway navigable by canoe or kayak? Will a Chapter 91 license be required? What are the required vertical and horizontal clearances required by the waterway?
  - d. Does the bridge need to be able to carry any type of vehicle, such as emergency response vehicles?
  - e. What are the permitting needs? Would an Army Corp or Coast Guard Permit be required?
  - f. Does MassDOT need to review/approve the design?
  - g. What is a target date by which the bridges should be open to the public?
  - h. Is this a Design-Bid-Build project or a Design-Build?
3. Facilitate a site inspection to gather technical information about the development area. At a minimum, the following site assessments should be conducted:
  - a. A full site survey;
  - b. Identification of any utilities that must be avoided;
  - c. A hydraulic analysis to identify floodplain extents, design flood elevations, and any concerns related to scour; and
  - d. Borings to analyze the type and capacity of the soil at the site.



*Center Brook in Upton near the VFW, with Grove Street in the background.*

*Source: Upton Town Center Visioning Project (2019)*

## Process (continued)

4. Coordinate a preliminary design phase with an external consultant. If an RFP is necessary to procure consulting services, coordinate this process with the Town's financial committee and legal counsel. All potential bridge types that are feasible for the site should be discussed with the consultant, and an optimal bridge type should be recommended. Options may include in-place construction with various materials and structure types, as well as pre-manufactured bridges purchased from private manufacturers. This step may include a Bridge Type Selection Worksheet if required by MassDOT based on site conditions; even if this process is not required, a similar report may be a helpful tool for considering various design options. Any design report should include, at a minimum, the following considerations:
  - a. Description of the existing site (including utilities);
  - b. Description of project constraints (including geotechnical, hydraulics, and ROW);
  - c. Discussion of appropriate bridge superstructure types;
  - d. Discussion of appropriate substructure arrangements;
  - e. Preliminary cost estimates for the appropriate sub and superstructures; and
  - f. Recommendation of proposed bridge type and arrangement.
5. Identify site selection and paths to determine precise placement of the bridges. This will need to account for site limitations, including elevation changes, floodplains, parcel boundaries, and environmental elements. The selected site will need to be able to accommodate all ADA requirements and minimize environmental concerns. If any portion of the structure will sit on private land, property owners will need to be contacted about easements.
6. Assign the Engineer of Record (EOR) for the bridges to oversee key structural design steps. This is a critical step to ensuring the structural integrity of the bridges and developing an accurate project budget. At a minimum, the EOR should produce the following deliverables:
  - a. Production of design calculations proving adequacy of bridge and substructure elements;
  - b. Production of structural design drawings for construction;
  - c. Development of specifications for structural items; and
  - d. Development of final cost estimate for structural items.
7. Develop and release an RFP, including contract and financial management, for a firm to design the new bridges. The specific content of this RFP will depend on the type of structure that is selected in the previous step. If a pre-manufactured bridge is selected, this step may be replaced by choosing between available options.
8. Oversee the construction period and conduct periodic progress assessments. Implement traffic and other risk mitigations to ensure safety around the bridge during installation/construction.
9. Develop and install wayfinding signage and other materials around the new bridges to direct pedestrian traffic. The bridges should be incorporated into the larger Town Center Vision Plan as a way to increase pedestrian connectivity between existing and new amenities. Wayfinding signage, placemaking initiatives, and other pedestrianization changes should focus on connecting the bridges to other new development projects.
10. Conduct ongoing maintenance as needed. This may be overseen by the oversight body or outsourced to a contractor.

# Create a Business Registry and Business Outreach Strategy

<b>Category</b>	 Admin Capacity
<b>Location</b>	Town Center (Option to Include All of Upton)
<b>Origin</b>	Town leaders mentioned the need for a business registry and formal business outreach efforts during the LRRP Phase 1 presentation. This need was supported by the feedback received from business owners through interviews.
<b>Budget</b>	 Low Budget (Under \$50,000): Expenditure for this project would mostly be for program management. Conducting virtual engagement can further reduce costs. If a CRM service is desired in the future, this may substantially increase costs.
<b>Timeframe</b>	 Short Term (Less than 5 years): Creating a registry of all businesses in Upton can be done in a matter of weeks or months. Formalizing outreach efforts and creating communication channels may take longer, but can still be completed in fewer than five years. Engagement with businesses should be conducted on an ongoing basis.
<b>Risk</b>	 Medium Risk: The success of this project depends on the quality of business data available, and the ability to collect and capture the data. There is not likely to be a single source for aggregating contact information for all businesses in Upton, so substantial attention will be needed to ensure the business registry is comprehensive. Additional ongoing Town staff capacity will need to be devoted to managing relationships with businesses.
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"><li>• Number of Upton business engaged every quarter</li><li>• Share of Upton businesses registered in the initial database</li><li>• Time taken for a new business to get added into the registry</li><li>• Percentage of businesses information collected and entered into database</li><li>• New business data collection and entered</li><li>• Utilization of the database as a business outreach/communication tool</li><li>• Efficient communication source for communicating with business owners.</li><li>• Accuracy of real-time business data</li></ul>

## Action Item

The Town may develop outreach and engagement strategies to establish two-way communications with its business community in order to better understand their needs and concerns. A key aspect of this is to create a registry of retail and service-based businesses that can be used for that communication. Upton's Economic Development Committee (EDC) can help facilitate, plan, fund, and lead procurement for the communications and implementation of this project.

## Diagnostic

The outcomes of interviews with Upton's staff and committee members suggest the absence of a comprehensive business contact registry. Creating and maintaining a registry would allow the Town to better communicate with and support businesses. In turn, developing formalized connections between the Town and local businesses would help facilitate future business support efforts.

## Partners & Resources

### Implementation Partners

- Blackstone Valley Chamber of Commerce, Worcester Chamber of Commerce, Upton EDC: These entities offer programs and support around business organizing and leadership to promote engagement of small businesses.
- [The Massachusetts Small Business Development Center Network Central Regional Office \(MSBDC\)](#): This organization provides free and confidential one-to-one management advice and technical assistance to prospective and existing small businesses.
- Worcester Chamber of Commerce: The Chamber's [Connect for Success](#) program offers three groups which meet twice a month. Groups from non-competing industries make connections to grow their business through this networking opportunity.

### Implementation Tools

- Microsoft Excel or Google Sheets: Excel and Sheets are robust tools for getting the Town's business registry off the ground. All necessary information can be stored in these softwares and, if necessary, eventually imported into a paid database such as Salesforce or Insightly.
- Paid database/CRM services like Salesforce and Insightly: The Town should initially build its business registry via Excel or Google Sheets, but if additional functionality is needed in the future, paid database and CRM services can offer this. These services often cost between \$20,000 and \$50,000 annually for a municipal license.
- Commercial data and analytics providers like D&B Hoovers, Zoominfo, Insideview, and Experian: These are business database providers that sell access to information about business people and companies. The information about business trends, business industries, and contact information from these databases can be used to develop Upton's registry. These services often provide incomplete or outdated information and should only be used as a last resort.
- City Council or Town Meeting and/or Small Business Fair: This might attract local business owners and other neighborhood organizations who will be able to provide additional information and insights.

Free softwares like Excel (left) and paid services like Insightly (right) are both viable options for starting a business registry.  
Sources: Goman + York, Insightly (2021)

## Partners & Resources (continued)

### Funding Sources

- District Local Technical Assistance Funding (DLTAF) from the Commonwealth of Massachusetts: DLTAF is funded annually by the Commonwealth of Massachusetts to help municipalities with sustainable development and to encourage communities to form partnerships to achieve planning and development goals consistent with state and regional priorities. This can be used to procure business databases and technical assistance providers to engage the business owners.
- [Central Massachusetts Planning Commission \(CMRPC\)](#): CMRPC's Resource Development Assistance program shares information about current funding opportunities via direct email and/or newsletters. For some funding sources, CMRPC may be available to assist resource development (fund raising) and grant administration.
- [EDA FY 2021 American Rescue Plan Act, Regional Build Back Better Challenge](#): EDA will award funds in two phases to regional coalitions who are implementing recovery projects in a wide range of areas. Phase I grants up to \$500,000 to coalitions for technical assistance developing projects. Phase II awards between \$25 and \$75 million for project implementation. This would require the Town to combine this project with others as a part of a regional development coalition.
- [EDA FY 2021 American Rescue Plan Act, Economic Adjustment Assistance](#): This broad grant program will provide funding for communities to plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs.
- [Mass Community One Stop for Growth Grants](#): A single application portal allows applicants to be considered for ten grant programs from three state agencies. Funding is available for planning, infrastructure, capital, and programmatic projects.

## Process

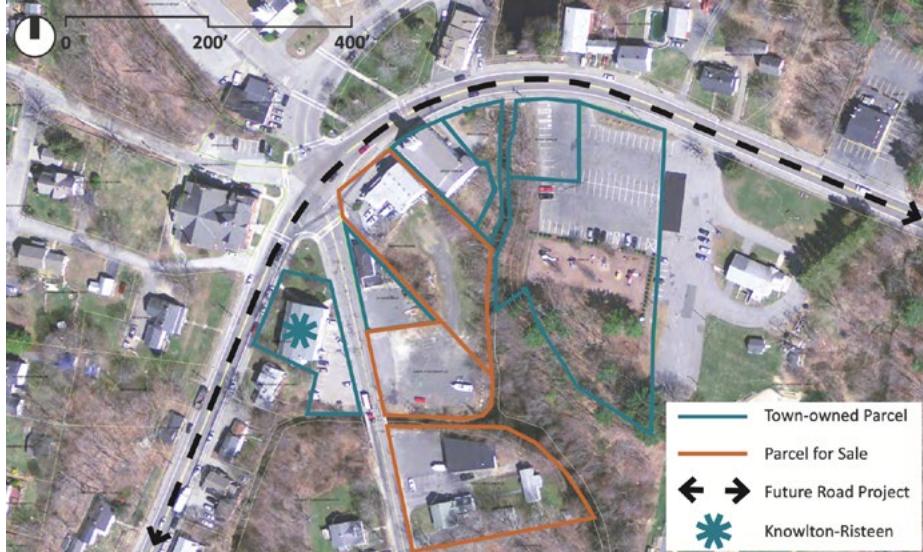
1. Identify an oversight body to manage the creation of the business registry and ongoing engagement with local businesses. This may be an existing Town entity like the EDC or a new body created specifically for this purpose. If resources are available, it may be helpful to hire a full- or part-time Business Outreach and Engagement Coordinator to manage this project.
2. Determine the information fields for data collection for each Upton business. Any information the Town may need should be collected from each business. Multiple Town agencies should be consulted to ensure the business registry meets their needs. The following fields should be considered, as well as any others identified by Town agencies:
  - a. Business type, including NAICS codes;
  - b. Street address;
  - c. Block and lot number;
  - d. Type of space occupied (eg. home-based, office, storefront, restaurant, etc.);
  - e. Primary and secondary contacts within the business;
  - f. For businesses with an office or storefront, type of occupancy (ie. ownership or rentership);
  - g. For businesses who rent space, contact information for the landlord; and
  - h. M/WBE certifications, if applicable.
3. Create an Excel or Google Sheets spreadsheet where the business registry will be stored. In the early stages, a spreadsheet is likely the best format for this database. Later on, the Town may elect to pay for a database or CRM service from a provider such as Salesforce or Insightly. This spreadsheet should be stored in an accessible location for all relevant Town agencies and have several backups.

## Process (continued)

4. Identify multiple business information sources to capture data from as many Upton businesses as possible. For each business identified, conduct outreach to obtain all information listed in step (2). Possible strategies for obtaining business information include:
  - a. Coordinate with the Town Clerk's office to obtain any business lists it may possess.
  - b. Coordinate with other Town agencies, such as the Health Department, to identify restaurants and other businesses among their contacts.
  - c. Consult the Town's sales tax registration lists for any outstanding businesses. This is an effective tool for identifying home-based businesses who may not be listed in other locations.
  - d. Contact regional entities, including the Blackstone Valley Chamber of Commerce and CMRPC, to obtain any business lists or contacts they may possess.
  - e. Conduct Google searches to locate businesses in Upton.
  - f. Contact known businesses and economic development leaders for references to other businesses.
  - g. As a final resort, consider paid business registry services such as Hoovers and DNB, which can provide business lists for a fee. These services often provide outdated and/or incomplete information and should only be used if other identification strategies fail to identify a large number of businesses.
5. Set up a registration form on the Town's website for new businesses to be included in the registry. This form should collect all of the information in step (2) and allow businesses who were not initially captured in the database to register themselves. The link to this form should be widely publicized on the Town's website, at the Clerk's office, through regional resources such as the Blackstone Valley Chamber of Commerce and CMRPC, on social media, in newspapers and newsletters, and via any other available media.
6. Assess gaps in the data and confirm contact information for all registered businesses. Reach out to registered businesses to solicit strategies for contacting any outstanding businesses. Confirm that the list includes entrepreneurs, home-based businesses, and other area micro-businesses.
7. Align on a decision about publishing the registry to the Upton community depending on the interest from Town leadership and policies of the data provider. If the registry is to be made public, coordinate with the Town IT division to publish this on the Town website.
8. Identify points of contact for small businesses within the EDC, the Town Clerk's office, and the Blackstone Valley Chamber of Commerce. These contacts should be available to Upton businesses to provide assistance and guidance for any business development needs. Contact information for these individuals should be made available to all businesses in the registry via the Town's website, direct outreach, and any other outreach mechanisms selected by the Town in step (7).
9. Update the Town's website to include other resources for small businesses. These may include resources offered by the Upton EDC, the Blackstone Valley Chamber of Commerce, CMRPC, state and federal programs, and any funding or grant services for business development initiatives.
10. With the EDC and Economic Development Coordinator as primary contacts for the Town, determine the feasibility for various engagement channels with Town Center business owners. Communication channels may include:
  - a. Monthly newsletter;
  - b. Monthly/quarterly business breakfast;
  - c. Office hours with BOS, EDC, and other agencies;
  - d. Ongoing needs assessment/grievance survey; and/or
  - e. Partnerships with local businesses to host events.
11. Develop a maintenance plan to regularly update and check the registry. This may be operated in partnership between the EDC, the Town Clerk's office, and/or other Town agencies. State and federal funding, including funding through the American Rescue Plan Act (ARPA), may be available for ongoing maintenance expenses.
12. If the Town's needs eventually outgrow the capabilities of the Excel-based database, evaluate the benefits and costs of other database providers, such as Salesforce and Insightly, and purchase the software.

# Identify a Marketing Approach for Mixed-Use Projects on Town-Owned Parcels

<b>Category</b>	 Public Realm
<b>Location</b>	Parcels along Main and Grove Streets, Town Center
<b>Origin</b>	Town leaders identified an improved marketing approach as a need during Karp Strategies's site visit to the Upton Town Center. This need was supported by stakeholder interviews and feedback received during the public presentation.
<b>Budget</b>	 Medium Budget (\$50,000 - \$200,000): The primary cost is to contract with a consultant to carry out a financial feasibility assessment for the study area and brokerage fee for a real estate agent to sell the parcels.
<b>Timeframe</b>	 Short Term (Less than 5 years): A marketing approach can be developed in less than a year.
<b>Risk</b>	 Medium Risk: The Town's RFP received no responses last time it was released. This marketing approach will need to improve upon the previous version to ensure that a partner developer is found. Other potential risks are the structural issues and deteriorating physical conditions that could prevent the success of a development.
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>Number of respondents to the RFP Q&amp;A period</li> <li>Viable applications received</li> <li>Successful procurement of a developer through the RFP process</li> </ul>



Parcels included in the Town's 2020 RFP for redevelopment.

Source: Upton Center Visioning Project (2019)

**Action Item**

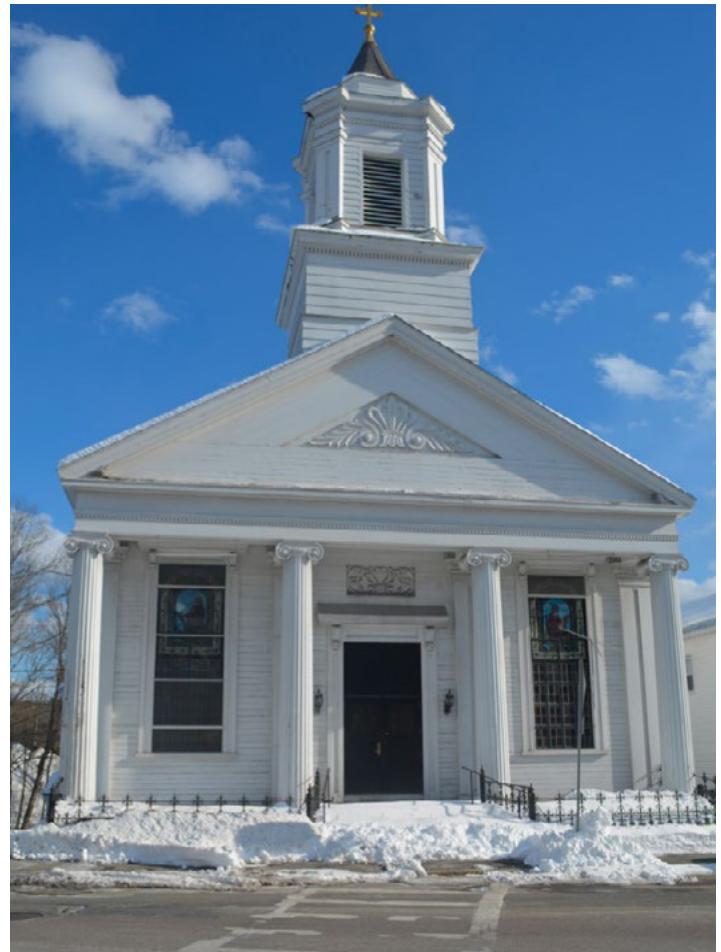
The Town may develop a marketing approach to attract mixed-use developers to Town-owned parcels in the Town Center. An RFP for development on key town-owned parcels on Grove, Warren and Main Streets was released in March 2020 but received no responses, partially due to the COVID-19 pandemic. The content of this RFP can be revisited and re-released under the new marketing approach to attract viable development partners.

**Diagnostic**

The Town owns several parcels of land in the Town Center that it would like to see redeveloped into mixed-use developments. There are four parcels, including the Holy Angels Church, the adjacent private building, and two municipal parking lots. Development on these parcels would require new construction as well as renovation and/or demolition of the existing two structures. The Town has stated a preference for preservation and rehabilitation of the church.

The Town released an RFP in March 2020, seeking a partner to build new mixed-use development on these parcels. Although the RFP was downloaded 30 times, no responses or bids were received. Much of this lack of response was attributed to the onset of the COVID-19 pandemic, which prevented many developers from taking on new bids. However, other potential shortcomings with the RFP were also explored, such as a small potential profit margin, missing details about site conditions and zoning, a quick turnaround, and a lack of site marketing.

In order to attract developers and other partners for these projects, the Town needs to develop a marketing approach for the development potential of these parcels. This approach should build on the strengths of the previous RFP and fill in gaps to attract developers with a concise, informative document.



*The redevelopment site contains existing structures like the Knowlton-Ristein Building (top left) and the Holy Angels Church (right) as well as several vacant lots, some of which are currently used for parking.*

*Sources: Upton Center Visioning Project (2019)*

## Partners & Resources

### Implementation Partners

- Upton Economic Development Committee (EDC): The EDC oversaw the 2020 Town Center RFP and will likely maintain oversight of the process.
- Professional Commercial Real Estate Firms: Professional firms will provide valuable insight on how to improve the RFP, as well as helping the Town connect with regional developers who may be interested in this development.
- Local and Regional Developers: Local and regional developers can help the Town identify issues in the original RFP that prevented any developers from responding.
- Upton Planning Department, Conservation Commission, and Land Stewardship Committee: Municipal planning staff can assist with review of land subdivision and development proposals to ensure conformity with local, state, and federal laws and regulations.
- Massachusetts Department. of Housing and Community Development (DHCD): DHCD offers support and insight to municipalities to help navigate changes to zoning regulations and potential incentives for new development projects.

### Implementation Tools

- [Massachusetts Shared Service Manual: A Toolkit for Regionalization Best Practices for City and Town Officials, MARPA, January, 2013](#): This guide provides information about certain state regulations and where to find more information about specific zoning applications, etc.

### Funding Sources

- According to Upton EDC's [Meeting Minutes](#) from May 2019, the Town can initiate a 40R development project, which allows for increased density, state reimbursement, and contribution towards affordable housing percentage. The State can provide incentives to build higher density, mixed use projects. This would require review and approval of DHCD.
- [EDA FY 2021 American Rescue Plan Act, Regional Build Back Better Challenge](#): EDA will award funds in two phases to regional coalitions who are implementing recovery projects in a wide range of areas. Phase I grants up to \$500,000 to coalitions for technical assistance developing projects. Phase II awards between \$25 and \$75 million for project implementation. This would require the Town to combine this project with others as a part of a regional development coalition.
- [EDA FY 2021 American Rescue Plan Act, Economic Adjustment Assistance](#): This broad grant program will provide funding for communities to plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs.
- [Mass Community One Stop for Growth Grants](#): A single application portal allows applicants to be considered for ten grant programs from three state agencies. Funding is available for planning, infrastructure, capital, and programmatic projects.

## Process

1. Convene a small oversight body to manage the development and rollout of the updated RFP. This may be the same RFP Committee from the 2020 release or a new entity, depending on the capacity of the original members.
2. Identify a real estate advisory firm to conduct a financial feasibility assessment for these parcels. Providing figures on the feasibility of development in this area is critical for attracting developers. The assessment should specifically account for the impact of the Holy Angels Church building on development feasibility. The Town should understand financial feasibility with and without including the Church in the RFP, and decide accordingly whether to include it.
3. Identify incentives, flexibility, and requirements that the RFP can outline in areas including uses and design. This can include concessions to facilitate development, such as waived land cost, Town-subsidized engineering or design studies, copayment of costs, tax credits, and/or other incentives for prospective developers.

## Process (continued)

4. Seek draft RFP review from field experts and practitioners. Ideally, this would include feedback from a developer who received the previous RFP but chose not to bid. To maintain procurement integrity, any developer asked to consult on the RFP must agree not to bid on the project.
5. Restructure the RFP to focus on three main elements:
  - a. Vision: Attract developers to the site with a clear vision of the community's existing conditions and possibilities for growth. Include attractive photos of the site, including the exterior and interior of all existing buildings. The community should be presented in a human-centered manner that emphasizes the existing residents and businesses.
  - b. Opportunity: Provide pertinent information about the properties available for development. This should include:
    - History on the buildings and the Town Center;
    - Building documentation for existing structures, such as floor plans;
    - Assessment of conditions, including appraisals and structural analyses of existing buildings;
    - Relevant site restrictions and guidelines, including zoning codes, covenants, and any other limitations;
    - Market research report for the site and the Town Center; and
    - Financial feasibility estimates for development, based on the study in step 2.
  - c. Expectations: Set expectations on how and when development should take place. This should outline any preferred uses, design guidelines, potential incentives or partnerships, review processes, construction timelines, and opportunities for in-person site visits.
- Overall, the restructured RFP should be grounded in a human-centered vision for the site and supplement this with all pertinent information that developers may need. Elements such as photos, local contact information, and highlights of current and future amenities are critical to presenting the Town Center as an attractive site for development. Explicit attention should also be given to the logistics of property disposition once the bid is awarded, as the area is currently under mixed public and private ownership.
6. Set a realistic RFP response timeframe that allows prospective developers to conduct all necessary due diligence. This timeline should include explicit opportunities for prospective developers to tour the site in-person and speak with local businesses and residents about potential uses.
7. Distribute the RFP to prospective developers using both active and passive sharing methods:
  - a. Circulate the RFP to the Town's list of developer contacts.
  - b. Post the RFP on the Town register. The RFP should be easily downloadable and the website should track who downloads the document.
  - c. Find a commercial service to market the RFP to a broader base of potential developers. One potential option is Keller Williams. The Blackstone Valley Chamber of Commerce is also a potential resource for building regional connections.
8. Facilitate ample opportunities for prospective developers to visit the site and connect with local residents and other developers. Given the unique nature of this site, getting developers on the ground is the most likely way to facilitate vision development. Many local businesses and residents also have ideas for how to use the site and church building.
9. Repeat the response and procurement schedule from the previous RFP release on an extended timeline, as determined in step 6. Once the RFP is successfully restructured and marketed, with connections established with prospective developers, the Town's existing administrative structure for selecting a bid and awarding a contract can be followed.

# Link Local Retailers and Service-Providers to Online Marketplaces

<b>Category</b>	 Revenue & Sales
<b>Location</b>	Town Center (Option to Include All of Upton)
<b>Origin</b>	The Karp Strategies team identified upgrades as a need from Upton's LRRP program application. Local businesses and the Town Planner reiterated this as a point of focus.
<b>Budget</b>	 Low Budget (Under \$50,000): Many tools and training resources required for this project are free. Program management expenses would be limited, and expenditures would primarily fund expert consultation.
<b>Timeframe</b>	 Short Term (Less than 5 years): Trainings and implementation support workshops can be planned and conducted in under a year (though with the expectation that they will continue in the future).
<b>Risk</b>	 Low Risk: This is a low-budget, short-term project with few risks. Potential risks for this project include the lack of interest/appeal that can lead to low turnout to training and capacity building sessions and limited capacity for delivery and other logistics that are required for online marketplaces to work successfully.
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"><li>• Share of Upton businesses attending the training sessions</li><li>• Share of Upton businesses setting up and actively using online marketplaces</li><li>• Business-facing KPIs from the post-implementation evaluation survey:<ul style="list-style-type: none"><li>• Total sales (\$)</li><li>• Total online sales (\$)</li><li>• Number of customers</li><li>• Number of new (online-only) customers</li></ul></li></ul>



*Online marketplaces have become a valuable tool for growing small businesses.  
Source: Pxfuel (2021)*

<b>Action Item</b>	<p>The Town may help facilitate, fund, and identify technical assistance providers for the training and monitor progress for this project. Many of the small businesses in Upton are home-based, and do not have a physical storefront. These businesses, as well as those with existing storefronts in the Upton Town Center, would benefit greatly from assistance developing an online marketplace to advertise and sell products.</p>
<b>Diagnostic</b>	<p>The need to attract and retain customers is one of the top priorities for businesses in Upton, especially after the pandemic. Owing to the shift in commuting patterns and school schedules, patronage to local businesses has decreased in the Upton Town Center. Business owners and Town Representatives mention that online retail activity, on the other hand, has increased. Every order through Amazon and other global marketplaces is a retail leakage to a seller outside the town. Many of these transactions are items that could be purchased from local retailers.</p> <p>Technical assistance and training for retailers and service-providers was identified as a significant need in the Upton business survey:</p> <ul style="list-style-type: none"> <li>• 9 of 10 businesses reported that they had fewer on-site customers through the pandemic, causing them to generate less revenue. Enabling Buy Online Pickup In Store (BOPIS), Buy Online Pickup At Curb (BOPAC), or at-home service through an online marketplace would not only make local customers feel more comfortable about engaging with the businesses again but also would extend the business reach to wider audiences.</li> <li>• 8 of 10 businesses expressed interest in getting technical support to set up an online marketplace and other selling channels.</li> </ul>
<b>Partners &amp; Resources</b>	<p><b>Implementation Partners</b></p> <ul style="list-style-type: none"> <li>• <u>Blackstone Valley Chamber of Commerce</u>: This organization has strong networks in the business community in Upton (and ten other neighbouring towns) and delivers technical training, leadership, and organizational support to business owners. Business counselling from them could help build the implementation plan for this project. They have an educational hub that can help inform training needs, resources, and approaches.</li> <li>• Upton Economic Development Committee (EDC): The EDC is the primary Town resource for Upton businesses and is a logical implementation partner for technical support programs like this.</li> <li>• Worcester Chamber of Commerce: The Chamber's <u>Connect for Success</u> program offers three groups that meet twice a month. Groups from non-competing industries make connections to grow their business through this networking opportunity. They also provide a number of other programs including in education and workforce development.</li> <li>• <u>The Massachusetts Small Business Development Center Network Central Regional Office (MSBDC) at Clark University</u>: This office offers resources for entrepreneurs and small businesses in Massachusetts, including connections to federal and state assistance as well as dedicated local support.</li> <li>• <u>The Worcester Polytechnic Institute (WPI) Small Business Digitization Services</u>: WPI's Foisie Business School created a new service that leverages a regional ecosystem of business resource organizations and teams of students and faculty to help businesses digitally transform from onsite to remote operations, and from in-person to online customer engagements. They are offering no-cost digital service consulting to small businesses and non-profits to help them transition to a digital revenue or operating model.</li> </ul> <p><b>Implementation Tools</b></p> <ul style="list-style-type: none"> <li>• Shopify, Etsy, Facebook Marketplace and other third-party marketplaces: These are platforms that enable businesses to quickly create e-commerce websites backed by tools that help find customers, drive sales, and manage order logistics. Some of these marketplaces also have educational resources and guides for businesses to move online and reach more customers.</li> <li>• Search engine optimization, customer relationship management, consumer mapping, and other tools: These can be tools like Wix or Wordpress that allow businesses to create their own webpage that is optimized for search engines, or ones like Salesforce or Capsule that can help in identifying and establishing communication with multiple customers/partners.</li> </ul>

## Partners & Resources (continued)

### Funding Sources

- [EDA FY 2021 American Rescue Plan Act, Good Jobs Challenge](#): Regional workforce training systems and sectoral partnerships funded under this grant should connect employers in an industry with key regional stakeholders, including state and local governmental entities, economic development organizations, workforce development boards, employer-facing organizations, education and training providers, community-based organizations (CBOs), worker-serving organizations (WSOs), and/or labor unions. The grant requires the initiative be led by a System Lead Entity or Backbone Organization, which in this case could be the Upton EDC or a designated Chamber of Commerce with the capacity to coordinate between multiple stakeholders.
- [EDA FY 2021 American Rescue Plan Act, Regional Build Back Better Challenge](#): EDA will award funds in two phases to regional coalitions who are implementing recovery projects in a wide range of areas. Phase I grants up to \$500,000 to coalitions for technical assistance developing projects. Phase II awards between \$25 and \$75 million for project implementation. This would require the Town to combine this project with others as a part of a regional development coalition.
- [EDA FY 2021 American Rescue Plan Act, Economic Adjustment Assistance](#): This broad grant program will provide funding for communities to plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs.
- [Mass Community One Stop for Growth Grants](#): A single application portal allows applicants to be considered for ten grant programs from three state agencies. Funding is available for planning, infrastructure, capital, and programmatic projects.
- Massachusetts Growth Capital Corporation (MGCC) [Small Business Resources](#): Their website frequently updates grant opportunities ranging from Restaurant Revitalization, Shuttered Venue Operations, Economic Injury Disaster, etc.
- [MGCC Empower Digital Grant](#): MGCC provides financing and managerial assistance, and access to commercial resources to small businesses. Their Empower Digital Grant seeks to support the development of digital capabilities and consequent growth of small businesses.



*Marketplace platforms like Etsy, Shopify, Facebook Marketplace, and Amazon can help small businesses create an online store.*

**Process**

1. Use the business registry to create a list of store-based and home-based businesses. Establishing a business registry is the outcome of a separate Project Sheet in this report.
2. Identify an oversight committee for setting up a technical assistance program in Upton. This may be the Economic Development Committee, other existing Town entity, or a newly-created body solely intended for this purpose.
3. Create a current conditions assessment survey to be sent to the registry in order to understand existing e-commerce efforts. The survey can also help Upton critically understand business-specific needs around technical assistance for an online marketplace. This survey should ask businesses to describe the existing state of their online marketplace and e-commerce efforts, identify any challenges or barriers to implementation, and indicate any desired technical assistance focus areas, if any.
4. Identify a third party technical assistance (TA) provider to support and train businesses in setting up e-commerce platforms.
  - a. Set up the goals and parameters for the TA provider based on the outcomes of the survey. The TA should be equipped to meet businesses at their current capacity and provide them with the desired types of technical support.
  - b. Procure a TA provider (using already established contractual processes). This may require a formal RFP or private procurement. In either case, consult with the Town's legal counsel and financial committee to handle all contractual and financial matters.
  - c. Work with the TA provider to set up a project roadmap, training schedule, implementation support workshop, and follow-up sessions with businesses. The type and number of sessions offered should depend on the number of interested businesses, the kinds of support desired, and the availability of materials such as meeting rooms with computers. Workshops may be done in group and/or one-on-one settings, depending on the level of personalized support needed by businesses.
5. Conduct in-person and online outreach about these training and support sessions. The business registry will be a valuable resource in this step. The Town should reach out directly to all businesses who expressed interest in any form of technical support to inform them of the availability of TA sessions. Additionally, information about the sessions should be posted publicly so that businesses who did not express an interest in technical support in the initial survey are still given the opportunity to participate.
6. Carry out the implementation plan from step 4(c). Work with the TA provider to procure venues and required materials for each session. Check in regularly with the TA and business participants to solicit feedback and monitor progress.
7. Conduct a post-implementation evaluation survey to assess improvement in revenue and sales through the e-commerce platforms. All businesses who participated in any technical assistance sessions should be contacted to seek feedback.
  - a. If successful, there could be additional communication in the form of one-on-one conversations or another survey to see what else businesses need help with.
  - b. If not, Upton can conduct interviews or focus groups to understand why it failed to meet the needs of businesses. If needed, Upton can also find a new assistance provider.
8. Create promotional materials to market the technical assistance programs. These materials should highlight the local businesses that participated, demonstrate the progress made through the training programs, and direct the public to the newly-created or improved online marketplaces.
9. If desired, this program may be repeated multiple times. Businesses who elect not to participate in the initial round of technical assistance may be attracted to do so in the future upon seeing the success of those who do participate.

# Provide Facade Improvement Grants

<b>Category</b>	 Private Realm
<b>Location</b>	Town Center (Option to Include All of Upton)
<b>Origin</b>	Town leaders identified that facade upgrades could help align the existing privately-owned buildings with the Upton Town Center vision and aesthetics.
<b>Budget</b>	 Low Budget (Under \$50,000): This project is scalable to meet the needs of the Town and potential funding sources. Program management expenses would be limited, and expenditures would primarily fund building supplies reimbursed for local businesses.
<b>Timeframe</b>	 Short Term (Less than 5 years): This project can be planned and executed in under a year. If a revolving loan funding structure is selected, this project may be implemented on a repeating basis.
<b>Risk</b>	 Low Risk: This is a low-budget, short-term project that requires limited time for Town staff and is unlikely to face budgetary concerns. A potential risk is perceived unfairness in the grant process from businesses who are not awarded a grant.
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"><li>Number of facade grants awarded</li><li>Additional funds spent on facade improvement beyond grant funding</li><li>Complete execution of planned improvements</li><li>Adherence to design guidelines</li></ul>



*Facade improvements to businesses like this bar in New Albany, Indiana, are an effective, low-cost way to bring new life to historic business districts like Upton's Town Center.*

*Source: City of New Albany, Indiana (2018)*

## Action Item

The Town may create a Facade Improvement Grants program for Upton Town Center businesses. This grant could support Upton Town Center's transformation toward the vision developed through the Economic Development Committee (EDC). Utilizing Upton's newly created Design Guidelines, businesses could receive partial or full financial support to upgrade the exteriors of their buildings. Improvements can include new exterior paint, signage, building features, or other aesthetic enhancements. A to-be-determined committee can manage the grants program including the creation of an application and evaluation system, grant and fund management, and program execution.

## Diagnostic

Town leaders identified facade improvements for several businesses in the Town Center as an effective short-term step to improve downtown before the Town Center Vision is implemented. As the Town prepares to implement its Vision Plan that will add new amenities and infrastructure upgrades to the Town Center, there is a short-term opportunity to improve existing assets in alignment with the tenets of that Vision Plan. A few buildings in the Town Center, such as the Town Hall, have already been renovated in recent years. Other existing buildings are in need of aesthetic improvements to meet the standard set by renovated and to-be-constructed new buildings.

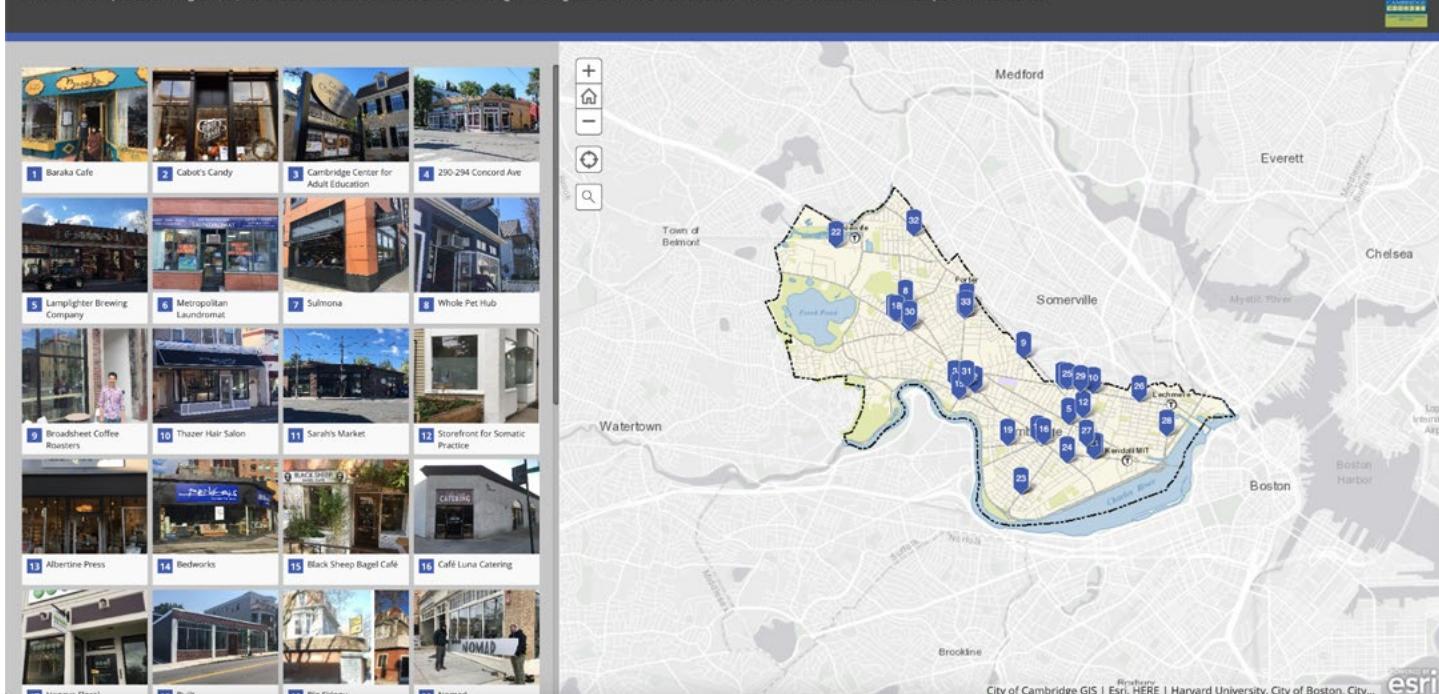
The private sector in the Town Center appears to agree with the need for aesthetic improvements to existing businesses. Facade improvement for private businesses was identified as a significant area of need in the Upton business survey:

- 50% of businesses expressed interest in low-cost financial assistance for facade improvements;
- 60% of businesses were dissatisfied with the condition of facades and storefronts; only 10% were satisfied; and
- 90% of businesses indicated that storefront renovation was an important strategy in Upton Town Center.

## Storefront Improvement Program

The Storefront Improvement Program (SIP) has assisted numerous businesses all over Cambridge in making their storefronts more attractive, effective, and accessible. This is a sample of success stories.

Cambridge, MA CDD [Facebook](#) [Twitter](#) [Instagram](#)



*Facade improvement programs in other New England towns like Cambridge, MA, have been highly successful.*

*Source: City of Cambridge, Massachusetts (2021)*

**Implementation Partners**

- Upton Historical Commission, Upton EDC, and/or Upton Community Preservation Commission: These public entities in Upton have the ability to manage, and/or support the facade improvement program.

**Implementation Tools**

- Design Guidelines are an effective way for the Town to guide facade improvements towards a cohesive aesthetic across the district.
- Consult with local architects to seek input on Design Guidelines, ideal facade improvements, and prioritization strategies for funding allocation.
- Host a block party or other form of community event to garner support for and interest in the initiative.

**Funding Sources**

- MassDevelopment [Commonwealth Places grant program](#): This grant program is designed to advance locally driven placemaking in downtown and neighborhood commercial districts in central MA towns. It is primarily targeted at COVID-19 recovery and economic development efforts. These funds can be used for many public space and commercial district improvement projects to facilitate improved attraction and safety for customers and pedestrians.
- Mass CPC [Community Preservation Act \(CPA\) Funds](#): The CPA allows towns to set up a community preservation fund to generate funds for local preservation projects. Upton has already created a CPA fund that has been used for other purposes. CPA funds can be raised through multiple mechanisms:
  - Property tax surcharge, up to 3%;
  - Fund matching from statewide CPA fund; and/or
  - Bonds issued against future CPA revenue.
- [EDA FY 2021 American Rescue Plan Act, Travel, Tourism, and Outdoor Recreation](#): EDA's grant can award anywhere between \$100,000 and \$10,000,000. This grant is designed to provide a wide-range of financial assistance to communities and regions to rebuild and strengthen their travel, tourism, and outdoor recreation industry through various infrastructure and non-infrastructure projects.
- [EDA FY 2021 American Rescue Plan Act, Regional Build Back Better Challenge](#): EDA will award funds in two phases to regional coalitions who are implementing recovery projects in a wide range of areas. Phase I grants up to \$500,000 to coalitions for technical assistance developing projects. Phase II awards between \$25 and \$75 million for project implementation. This would require the Town to combine this project with others as a part of a regional development coalition.
- [EDA FY 2021 American Rescue Plan Act, Economic Adjustment Assistance](#): This broad grant program will provide funding for communities to plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs.
- [Mass Community One Stop for Growth Grants](#): A single application portal allows applicants to be considered for ten grant programs from three state agencies. Funding is available for planning, infrastructure, capital, and programmatic projects
- [Metropolitan Area Planning Council \(MAPC\) Technical Assistance Program \(TAP\)](#): The TAP is a funding program that enables and assists municipalities in implementing projects that are beneficial to the community. TAP can fund a diverse range of projects including housing, economic development, shared services, municipal effectiveness, public engagement, public safety, public health, climate change, clean energy, equitable transit-oriented development, bicycle/pedestrian mobility, environmental protection, creative placemaking, and arts and culture planning. Municipalities can submit concepts for individual community-specific projects and for multi-community projects. Projects that promote regional collaboration and serve multiple communities, advance racial equity in the region, and/or promote COVID recovery will receive preference.

**Process**

1. Secure funding for the grants. The specific process for this step will vary based on the funding source(s) used.
2. Determine an award mechanism for funds distributed to businesses. The Town may elect to provide grants or distribute funds through a revolving, low-interest loan program. The appropriate funding mechanism should be determined based on the funding source and input from prospective applicants.
3. Identify whether an existing entity such as the Historical Commission or Planning Board can oversee this program or whether a new decision-making body is needed. The Historical Commission should be consulted in some capacity throughout the project, as many structures in the study area may be subject to historic preservation guidelines.
4. Convene the decision-making body to administer the grants or loans, as determined in step 2.
5. Set goals and evaluation measures. Coordinate with Upton Design Guidelines and determine business eligibility, geographic scope, eligible improvements and line-items, and any financial commitment for applicants. These criteria should be determined in accordance with the Town Center Vision Plan and should also be applied to future new developments.
6. Develop a rubric and scoring system for evaluating applications from businesses, including the funding range for recipients. Businesses with the highest need for facade upgrades should be prioritized. If funds are distributed as loans, applicants' ability to repay the loans may be a factor as well.
7. Coordinate financial details, including timelines, payout mechanisms, and reporting requirements. If funds are distributed as loans, this should account for loan repayment details as well.
8. Coordinate contracting mechanisms with the Town's legal counsel.
9. Create an application that businesses and other property owners can use which shares the selection criteria, design guidelines, and eligibility requirements. The application should be as simple and easy to access as possible to accommodate businesses with limited administrative capacity. Online application submission should be permitted, if possible.
10. Market the application to all potential recipients based on pre-determined eligibility. The forthcoming Upton business registry will be a valuable tool for identifying and contacting eligible businesses.
11. Develop a Q&A mechanism, set a Q&A period, and respond to questions. Multiple avenues of inquiry should be made available to businesses, including in-person and online formats.
12. Review applications to score adherence to design guidelines and other criteria as determined in steps 3-4.
13. Determine grant/loan winners and award amounts. The number of awardees should be determined by the amount of available funding and the level of demonstrated need from applicants.
14. Coordinate with the Town Financial Committee to distribute funds based on the mechanism determined in step 2.
15. Alert winners, and set up agreements and legal documents.
16. Communicate construction milestone expectations in partnership with the Financial Committee, the Historical Commission, and the Planning Department.
17. Monitor project progress and troubleshoot issues as needed. Applicants should be evaluated for their adherence to proposed timelines and designs.
18. Review final outcomes based on project review. Create any necessary reports or presentational documents to highlight improvements made through the program.
19. Report back to the funding source and the Upton community. Successful improvements should be marketed via press releases, social media, and other publication media.
20. If a revolving loan structure is utilized for fund distribution, these steps may be repeated as the Town reclaims funds from initial awardees.

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## Appendix

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# Appendix A: Structural Design Plan (Pedestrian Bridge) Guide: Mobility SME Toolkit

Provided by: Stantec Inc.

Jason Schrieber, Senior Principal

Betsy Kirtland, Structural Engineer

Amelia Casey, Transportation Planner



# Structural Design Plan (Pedestrian Bridge) Guide

*Mobility SME Toolkit*



## Table of Content

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- Project Management
  - Important Things to Remember or Consider
- Preliminary Design & Coordination
- Structural Design Steps
- Bid & Construction Phase Process
- Pedestrian Bridge Design Best Practices



## Project Management – What should you consider as you start your project?

Before engaging a consulting engineer to begin the design of the bridge, it would be prudent to know the answers to the following questions:

- *What are the Right-of-Way restrictions for this project?*
- *Are there any constraints imposed by environmentally sensitive or cultural resource areas?*
- *Is the waterway navigable by canoe or kayak? Will a Chapter 91 license be required? What are the required vertical and horizontal clearances required by the waterway?*
- *Does the bridge need to be able to carry any type of vehicle, such as emergency response vehicles?*
- *What are the permitting needs? Would an Army Corp or Coast Guard Permit be required?*
- *Does MassDOT need to review/approve the design?*
- *What is a target date to have the bridges open to the public by?*
- *Is this a Design-Bid-Build project or a Design-Build?*



***These steps outline key management strategies and items as you consider project location, scope, and management/project team***

## Pertinent Information to Collect

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**Before a consultant can begin determining appropriate structure types and span lengths, the following needs to happen:**

- A site survey needs to be taken, and utilities need to be identified and located:
  - *Are there any utilities on the site that will need to be avoided, relocated, or carried by the bridge?*
- A hydraulic analysis needs to be done:
  - *What is the design flood elevation, is scour a concern, and what are the extents of the floodplain?*
- Borings need to be taken:
  - *What is the type and capacity of the soil is at the site?*



## Preliminary Design & Coordination

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**MassDOT bridge projects typically begin with a consultant compiling a “Bridge Type Selection Worksheet” that discusses all the various types of bridges that would be appropriate for a site (given its site-specific constraints) and ultimately recommends a bridge type for further design development.**

- Even if a full-blown Bridge Type Selection Worksheet is not required or desired by the client (if not MassDOT), we still recommend that a similar style of “Basis of Design” report be created.
  - These reports provide the client with important information to understand why one type of bridge is more suitable for a site than another and forces the consultant to consider all site variables/constraints before starting the design.

***These reports should include:***

- ***Description of the existing site***
  - ***Most importantly: utilities***
- ***Description of project constraints***
  - ***Most importantly: geotechnical, hydraulics, and ROW***
- ***Discussion of appropriate bridge superstructure types***
- ***Discussion of appropriate substructure arrangements***
- ***Preliminary cost estimates for the appropriate sub and superstructures***
- ***Recommendation of proposed bridge type and arrangement.***

## Structural Design Steps

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**Once a bridge type has been selected, the Engineer-of-Record (EOR) for the bridge should oversee the following:**

- Production of design calculations proving adequacy of bridge & substructure elements
- Production of structural design drawings for construction
- Development of specifications for structural items
- Development of final cost estimate for structural items



## Bid & Construction Phase Process

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**If the project is performed in the traditional Design-Bid-Build format, then during the Bidding Phase, the EOR may:**

- Review & respond to questions from bidders
- Analyze bid results and advise client
- And during the Construction Phase, the EOR may:
  - Review submittals and answer RFIs
  - Perform field inspections or observations





## Structural Design Tips for Successful Outcomes



- *Pedestrian bridge projects can have major positive impacts for communities they serve.*



- *To finish these projects on budget and on schedule, it is pivotal to identify all the site constraints early in the process.*



- *Permitting is usually the longest step in the process for these types of projects and should be evaluated early.*



- *Basis of Design reports or Bridge Type Selection Worksheets are helpful for all parties.*



- *Engage a consulting firm that has experience with site-civil design in addition to structural bridge design.*

## Best Practices: Structural Design



### Quequechan River Rail Trail Bridge, MA

- Contractor Bid (December, 2014): \$74,250.00 (297 SF)
- Span length = 24ft +/-
- This bridge was constructed on new abutments set behind an existing wall. One side used a helical pile foundation.

## Best Practices: Structural Design



**The Northern Strand Bridge, Lynn, MA**

- Contractor Bid (October 2019): \$70,000.00 (1 LS)
- Span length = 14.5ft +/-
- This bridge was set on existing stone wall abutments with a new concrete bridge seat.

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## Appendix B: Create a Business Registry & Business Outreach Strategy

Provided by: Goman + York  
Denise L. Robidoux, Chief Operating Officer



## Create a Business Registry & Business Outreach Strategy

Upton, MA

Prepared by: GOMAN+YORK

Project Title	Create a Business Registry & Outreach Strategy
Origin	Town leaders expressed the need for a business registry and formal business outreach efforts during the LRRP Phase 1 presentation. This was also supported by the feedback received from business owners through interviews conducted.
Location/Census Tract	Upton Study Area
Budget & Sources of Funding	<p><b>Low Budget</b> (Under \$50k): Costs for this project would include program management. Since Upton is a small community, cost-effective methods should be engaged, such as developing and utilizing an Excel Database/Form to capture information or if another contact management program is utilized by the Town. Funding will support the Conducting virtual engagement can further reduce costs.</p> <p>Funding Sources include: ARPA, EDA funding used to support Economic Development efforts and administration capacity of the program, District Local Technical Assistance Funding (DLTAF) from the Commonwealth of Massachusetts - DLTAF is funded annually by the Commonwealth of Massachusetts to help municipalities with sustainable development and to encourage communities to form partnerships to achieve planning and development goals consistent with state and regional priorities. This can be used to procure business databases and technical assistance providers to engage the business owners.</p>
Timeframe	<b>Short Term</b> (Less Than 5 Years): Creating a database of all businesses in Upton can be done in a matter of weeks. However, this project should be continued on an ongoing basis as it will be used as a development and communication tool.
Risks	<b>Medium Risk</b> —This activity depends upon the quality of the business data available, and the ability to collect and capture the data. The project requires a commitment by the Town as to allocation of ongoing staff resources for the management and execution of this project. This initiative can support multiple Town uses, risks include continued staff support to update information. Limiting the collection of the information to just the study area is not recommended. An analysis regarding the return on the investment in data management tools by utilizing what is readily available in the short-term is recommended.
Key Performance Indicators	<ul style="list-style-type: none"><li>Percentage of businesses information collected and entered into database</li><li>New business data collection and entered</li><li>Utilization of the database as a business outreach/communication tool</li><li>Efficient communication source for communicating with business owners.</li></ul>

1

For more information, contact:  
Emmy Hahn / MDI/LRRP Program Coordinator Elizabeth.Hahn@mass.gov  
Charles Sanderson / MDI/LRRP Program Assistant Coordinator Charles.sanderson@mass.gov

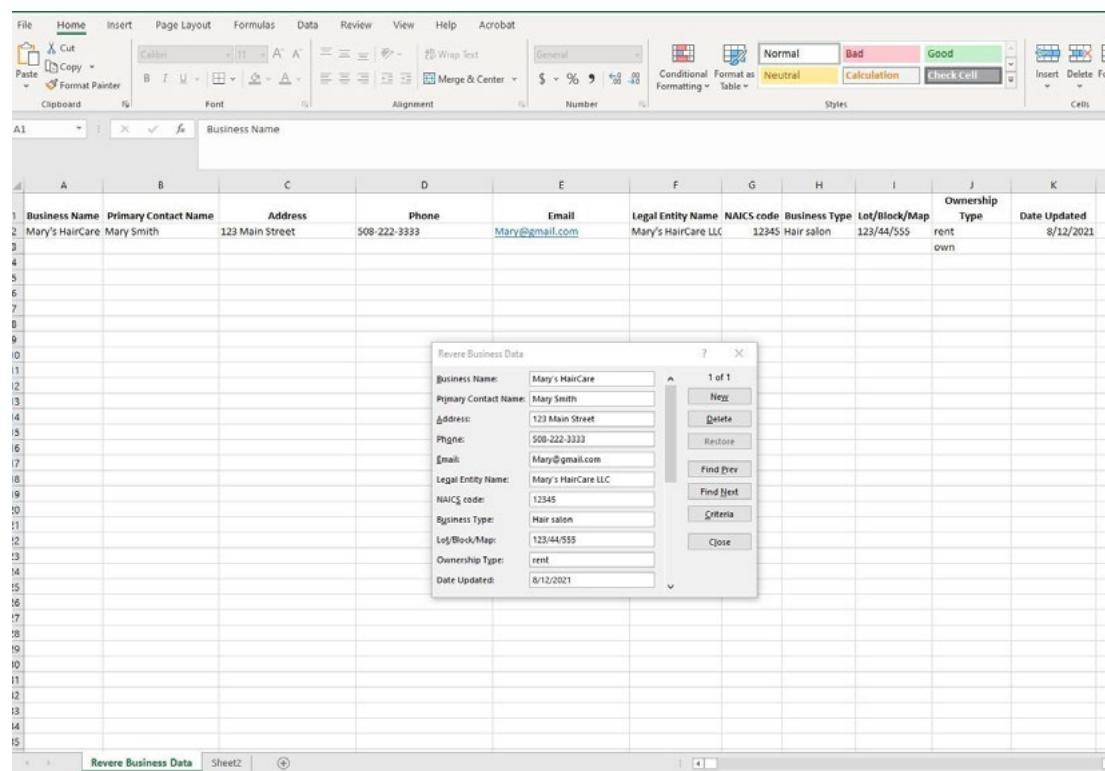
Partners and Resources	<ul style="list-style-type: none"> <li>• Accuracy of real-time business data</li> </ul> <p>Town, businesses, Blackstone Valley Chamber of Commerce</p>
Diagnostic/Covid-19 Impacts	<p>The outcomes of the interviews with Upton's Town staff and LRRP committee members suggest the absence of a comprehensive business contact registry. This was further realized at the beginning of and during the Covid-19 pandemic as the Town did not have a comprehensive business database to use for communicating and engaging with the town businesses. The Town determined that it would be beneficial to have a comprehensive database of businesses that could serve to communicate with the businesses and if structured properly, could have multiple uses within the Town government – i.e., economic development, building ownership tracking, tenant listings, business locations, types and size, vacancies, etc.</p>
Action Item	<p><b>Creating and maintaining a database/registry of businesses to allow the city to better communicate with and support businesses.</b> Developing formalized connections between the Town and local businesses would help facilitate future business support efforts.</p> <p><b>Create a contact database for use by multiple Town departments</b> with data collected by multiple departments to be utilized for outreach, communications, and programs to engage, inform, educate, and survey businesses.</p> <p><b>Capture data and information on Upton's local and home-based businesses.</b> The data collected should be able to be parsed and manipulated for a variety of internal and external uses.</p> <p><b>Develop a tool to facilitate regular communications from the Town</b> to inform local businesses regarding updates, funding opportunities, Town news, business events, etc.</p>
Process	<p><b>Secure funding for the program and determine management of the database efforts</b> – determine who is responsible for collecting data and maintaining the information collection and outgoing communications</p> <p><b>Hire a business outreach and engagement coordinator</b> to manage the database, along with outreach communications, programs and business events. Preferably this is managed by staff from the Economic Development Department. This staff person can be a liaison to the businesses and chamber.</p> <p><b>Determine the information fields for data collected</b> – since this goal of this is to collect business data for use by multiple Town departments, input should be derived from all departments involved. This should also tie to the Assessors information (GIS, lot/block/map)</p>

	<p>On a limited budget, if no other Town databases are to be used, an Excel spreadsheet can be used to capture up to 30 fields of information – this can be created in a protected document using the FORM function to enter and edit data. If at a later date the City decides to purchase CRM software this data can be easily transferred. See example of Excel Data/Form below.</p> <p><b>Identify business database information sources</b> to populate the database. These include: Health Dept, new business registry, sales tax registration, Chamber, outreach/visitation/field verification, Town Clerks office. There are firms that offer information on businesses and their contact information for purchase, however, the reliability and accuracy of that data for the cost are not recommended.</p> <ul style="list-style-type: none"><li>• Additional Data Capture - Create an online fillable form or survey link on the Town website to capture business information – coordinate with Town's webmaster.</li></ul> <p><b>Assess gaps in the data and confirm contact information.</b> This can be done by referring to a number of sources – online or local networks.</p> <ul style="list-style-type: none"><li>• Confirm that the list includes entrepreneurs, home-based businesses, and other area micro-businesses.</li><li>• Set up a registration form on the Town's EDC website for upcoming businesses to be included in the registry.</li><li>• Depending on the interest from Town leadership and policies of the data provider, align on decision about publishing this registry to the Upton community</li></ul> <p><b>Develop a maintenance plan to regularly update and check the registry.</b> With EDC and the Economic Development Coordinator as primary contacts for the Town, determine the feasibility for various engagement channels with the Town Center business owners</p> <p><b>Develop a business communication program</b> – this can include coordinating with the Chamber to offer business support programs for small businesses, training sessions on technology and social media. Communication channels utilizing e-tools like Constant Contact, MailChimp to communicate with business may need to be subscribed to.</p> <p>Communications may include:</p> <ul style="list-style-type: none"><li>• Monthly e-newsletter</li><li>• Monthly/quarterly business breakfast or business training sessions</li><li>• Office hours with BOS, EDC, and other agencies</li><li>• Ongoing needs assessment and business surveys</li><li>• Notice of funding opportunities</li></ul>
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- Establishing a Doing Business section on the website that allows business to register

**Program Evaluation** – this should be done regularly to determine how the program is being utilized and if any adjustments need to be made.

### Best Practice examples/photos



Business Name: Mary's HairCare  
 Primary Contact Name: Mary Smith  
 Address: 123 Main Street  
 Phone: 508-222-3333  
 Email: Mary@gmail.com  
 Legal Entity Name: Mary's HairCare LLC  
 NAICS code: 12345  
 Business Type: Hair salon  
 Lot/Block/Map: 123/44/555  
 Ownership Type: rent  
 Date Updated: 8/12/2021

Credit – Goman+York/Excel Form allows for the collection of 30 fields of information – utilizing the Form function allows for easy data input.



**Restaurant Revitalization Fund**  
**Get the Facts**  
**It's a Grant Not a Loan**

This Monday, Tuesday & Wednesday!

The restaurant industry has been Click these links to get more information

## Communicating with Your Landlord During the COVID-19 Pandemic

**BLOOMFIELD, CONNECTICUT (April 29, 2020)** - In times of uncertainty, it is important to keep the Landlord/Tenant lines of communication open. We are here to help you with that.

Adjusting to the "New Normal" is on everyone's mind as tenants are faced with the uncertainty of how to conduct business, when they can reopen and rehire, and how to pay expenses.

Landlords have to think about their businesses in the same way. If you need to ask your landlord for more time to pay your rent or are considering

Credit: Goman+York - Sample Business Communication/Survey efforts with Town and Chamber – Bloomfield, CT



Bloomfield CT  
Covid-19 Business Recovery Survey

**WE WANT TO HEAR FROM YOU!**

How can we assist you?

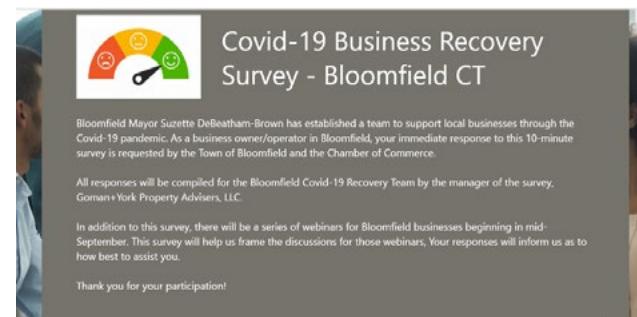
**Start survey**

Bloomfield Mayor Suzette DeBeatham-Brown has established a team to support local businesses through the Covid-19 pandemic. As a business owner/operator in Bloomfield, your immediate response to this 10-minute survey is requested by the Town of Bloomfield and the Chamber of Commerce.

All responses will be compiled for the Bloomfield Covid-19 Recovery Team by the manager of the survey, Goman+York Property Advisors, LLC.

In addition to this survey, there will be a series of webinars for Bloomfield businesses beginning in mid-September. This survey will help us frame the discussions for those webinars. Your responses will inform us as to how best to assist you.

Thank you for your participation!



**Covid-19 Business Recovery Survey - Bloomfield CT**

Bloomfield Mayor Suzette DeBeatham-Brown has established a team to support local businesses through the Covid-19 pandemic. As a business owner/operator in Bloomfield, your immediate response to this 10-minute survey is requested by the Town of Bloomfield and the Chamber of Commerce.

All responses will be compiled for the Bloomfield Covid-19 Recovery Team by the manager of the survey, Goman+York Property Advisors, LLC.

In addition to this survey, there will be a series of webinars for Bloomfield businesses beginning in mid-September. This survey will help us frame the discussions for those webinars. Your responses will inform us as to how best to assist you.

Thank you for your participation!



September 11, 2020

Attention Chamber Members!  
Take the Covid-19 Business Recovery Survey  
**WE WANT TO HEAR FROM YOU!**

**START SURVEY HERE**

Bloomfield Mayor Suzette DeBeatham-Brown has established a team to support local businesses through the Covid-19 pandemic. As a business owner/operator in Bloomfield, your immediate response to this 10-minute survey is requested by the Town of Bloomfield and the Chamber of Commerce.

All responses will be compiled for the Bloomfield Covid-19 Recovery Team by the manager of the survey, Goman+York Property Advisors, LLC.

In addition to this survey, there will be a series of webinars for Bloomfield businesses beginning in mid-

**BLOOMFIELD COVID-19 BUSINESS RECOVERY SURVEY UPCOMING WEBINARS**  
Suzette DeBeatham-Brown, Mayor of Bloomfield, has formed a committee to help local businesses navigate through the current and future effects of the Covid-19 pandemic. The committee is co-chaired by Michele Brown, Assistant Chief of the Bloomfield Economic Development Commission and Vira Smith, Vice President of Marketing for the Bloomfield Chamber of Commerce.

**Zoom Webinar Schedule**

- #1 - The New Normal - Promoting Bloomfield Businesses  
Monday, September 14, 2020 - 1pm - 4pm
- Focus: Communication and the importance of supporting local businesses
- Register in advance for this webinar: [https://zoom.us/meetings/register/WN\\_029hL0uGtGmZ0fHg](https://zoom.us/meetings/register/WN_029hL0uGtGmZ0fHg)
- YouTube Link: <https://youtu.be/7a5uJhJ0h8Q>

- #2 - Focus on Business - #BloomfieldBusiness  
Monday, September 21, 2020 - 1pm - 4pm
- Focus: Money transit with Google
- Register in advance for this webinar: [https://zoom.us/meetings/register/WN\\_15a4293575084f45C03](https://zoom.us/meetings/register/WN_15a4293575084f45C03)

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## Appendix C: Upton Redevelopment Opportunities: RFP Revision & Approach

Provided by: Zapalac Advisors  
Laurie Zapalac, Principal



# UPTON

## Redevelopment Opportunities: RFP revision & approach

LRRP SME Review: Aug 5, 2021 / notes: Aug 11, 2021  
Laurie Zapalac, PhD



**ZAPALAC ADVISORS**  
REAL ESTATE & ECONOMIC DEVELOPMENT

## Roadmap:

1. What is an RFP for redevelopment? How are strategies changing?
2. Marketing the RFP to attract developer interest
3. Case Studies from other cities and towns
4. Recommendations for Upton - including prelim budget and schedule feedback
5. Questions

# 1) What is an RFP for Redevelopment?

A call to for proposals to expedite the redevelopment process. Helps potential developers efficiently evaluate if the community and the building are a match for their interests

- I. **VISION: Provides the why** - community vision - and excite them about possibilities.  
Should include beautiful photographs of the interior and exterior of the building.
- II. **OPPORTUNITY: Clarify the what / where:** pertinent information on a potential property, such as:
  - District / building history and relevant past reports or proposals
  - Building documentation (floor plans and elevations to scale > to 3-d scan of building)
  - Condition assessment report (appraisal > historic structures report, structural analysis, etc)
  - Site conditions and zoning, as well as any known restrictions, covenants, limitations, etc.
  - Market research report for site, district or even region and context information
  - Preliminary cost estimate / assumption based feasibility analysis - could include preliminary tax credit assessment and education session
- III. **EXPECTATIONS: Sets expectations on the how, the when, and the who:**
  - Determine how specific you want to be on future building uses and design guidelines
  - Proposal review process: efficient, equitable ... participatory (?)
  - Pre-proposal site visit opportunity + informal “office hours” with key players, including MassDevelopment, MHC, tax credit specialists, etc.



**Entice with the sites**



## Showcase the community

## How are Strategies Changing? RFP Content:

- Educate about Upton's Long-Term Vision & Give a Flavor of its Community & Values: *more emphasis on selling the opportunity*
- Introduce the Development Opportunity: *provide more due diligence content*
- Make Expectations Clear - *state in advance what community benefits you desire*



## 2) Marketing the RFP to attract developer interest

### Active Sharing:

#### **Virtual:**

#1 Update your distribution list by using the network of businesses and developers already in Upton and the region.

#2 Email to all businesses and property owners and ask them to SHARE!

#3 Social media campaign / cross-posting  
Boost / advertise online

#4 Email the pdf in responses to any development inquiry

#### **In Real Life:**

Distribute copies to businesses

Make available during lively events in town!

#### **Plan a developer's tour and “office hours”**

### Passive Sharing:

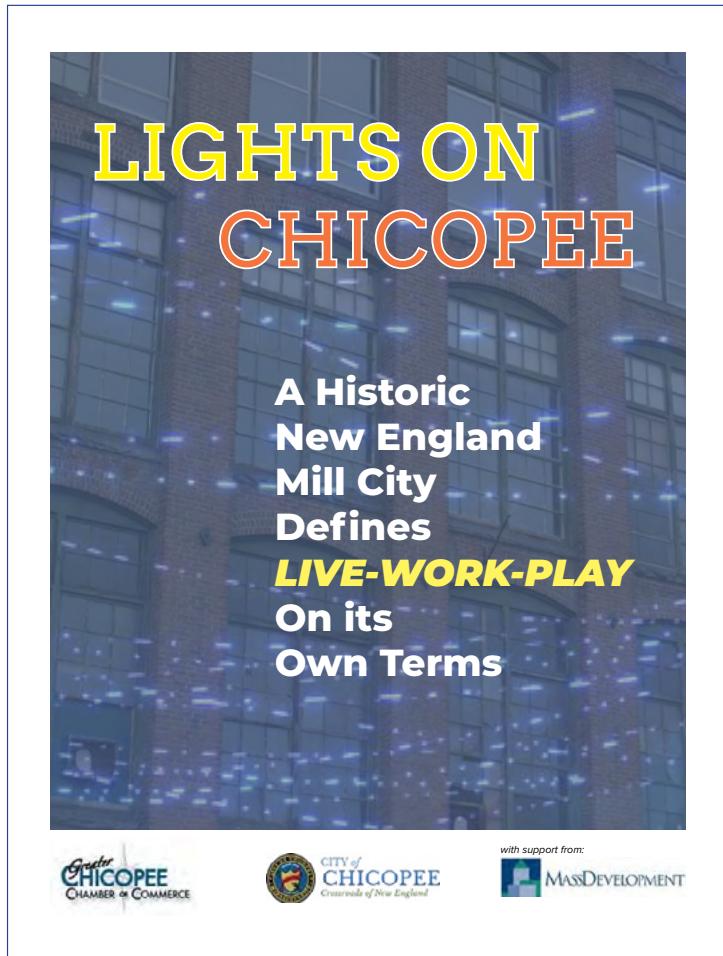
Link on Town Home Page

Embed content & offer a downloadable PDF. Make this available without registering but require interested parties to register in order to receive updates and pertinent information.

TOWN WEBSITE

RFP LINK /  
downloadable  
pdf

### 3) Examples / Best Practices of Vision: *Lights on Chicopee*



**LIGHTS ON CHICOOPEE**

A Historic New England Mill City Defines **LIVE-WORK-PLAY** On its Own Terms

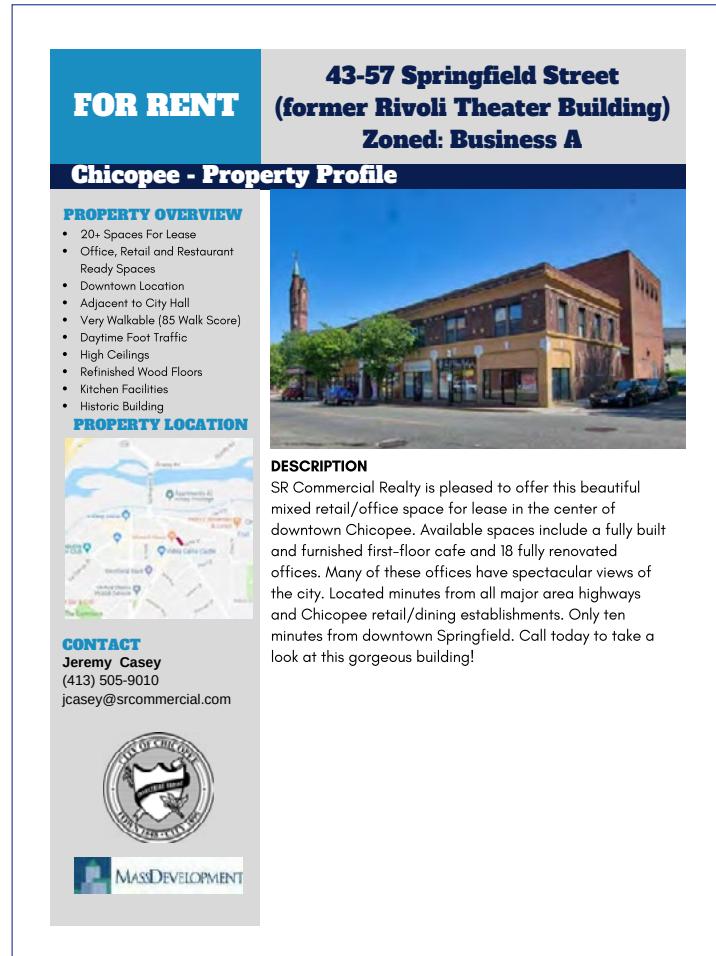
with support from:

Greater CHICOOPEE Chamber of Commerce

CITY of CHICOOPEE  
Crossroads of New England

MASSDEVELOPMENT

- Six pages total; first person testimony
- Shared at Lights on Arts & Culture (Winter Placemaking / multi-site event)
- Created concurrently with assembled real estate cut sheets as well as discrete info on OZ development opportunity



**FOR RENT**

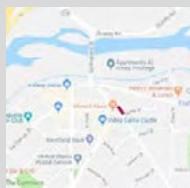
**43-57 Springfield Street  
(former Rivoli Theater Building)**  
**Zoned: Business A**

**Chicopee - Property Profile**

**PROPERTY OVERVIEW**

- 20+ Spaces For Lease
- Office, Retail and Restaurant Ready Spaces
- Downtown Location
- Adjacent to City Hall
- Very Walkable (85 Walk Score)
- Daytime Foot Traffic
- High Ceilings
- Refinished Wood Floors
- Kitchen Facilities
- Historic Building

**PROPERTY LOCATION**



**CONTACT**  
Jeremy Casey  
(413) 505-9010  
jcasey@screalty.com

**DESCRIPTION**

SR Commercial Realty is pleased to offer this beautiful mixed retail/office space for lease in the center of downtown Chicopee. Available spaces include a fully built and furnished first-floor cafe and 18 fully renovated offices. Many of these offices have spectacular views of the city. Located minutes from all major area highways and Chicopee retail/dining establishments. Only ten minutes from downtown Springfield. Call today to take a look at this gorgeous building!





- Cut Sheet Example - note assembled by Chicopee Town Planning Staff!

### 3) Examples / Best Practices: *Make it In Fall River (Vision)*

**FALL RIVER**

**Make It Here**

DESTINATION DINING  
NICHE MANUFACTURING  
SPECIALTY RETAIL & THE BLUE ECONOMY:  
**MEET US ON MAIN STREET  
TO SEE WHAT WE'RE MAKING**

BRISTOL COUNTY  
CHAMBER OF COMMERCE

with support from:  
MASSDEVELOPMENT

- Seven pages total
- Shared at Taste Fall River
- Note range of people represented

#### Live-Work-Create

Fall River grew substantially during the late 19th and early 20th century as a mill and factory town, with residential neighborhoods a short distance from locations of work and production. In addition to the numerous 19th century and early 20th century industrial mill complexes still found throughout city, wealth and patronage generated from its industrial success was invested in architecture and landscape architecture. Noted architect Ralph Adams Cram designed the [Fall River Public Library](#), which opened in 1899 and was restored in 2001, and the city boasts three [public parks](#) designed by Frederick Law Olmsted. The unique topography means that parts of the city share urban form characteristics with San Francisco (beautiful houses on a hillside, looking across a bay to a remarkable bridge), other parts embrace its working waterfront, while still others serve as a gateway to the farmland and nature preserves of the South Coast.

#### Main Street Revival

Looking back on its character in the middle of the 20th century, journalist William Moniz refers to Fall River's [Main Street](#) as an "elongated town square" and "the artery serving the heart of the city" where all members of society crossed paths. It was a densely populated promenade with theaters, schools, houses of worship, department stores for every price point, hotels and dining establishments, banks, and a center of local and county government. Though transformed over time by catastrophic fires, highway projects and the construction of a major government center complex under urban renewal, Main Street maintains many of its accrued assets and continues to be an important linkage between north and south neighborhoods. The potential to revive its mixed-use walkable and social urban characteristics -- both by restoring its physical density and through the introduction of more stores, businesses and cultural venues in existing buildings -- is supported by three factors: the density of residential neighborhoods such as [Corley Row](#) that abut it, its renewed connection to the waterfront brought about by recent investment in highway rerouting and waterfront beautification, and the presence of key businesses, developers and institutions already leading the way. Further, the central section of Main Street falls within a designated [opportunity zone](#), with two adjacent census tracts also designated.

#### Transformation Underway

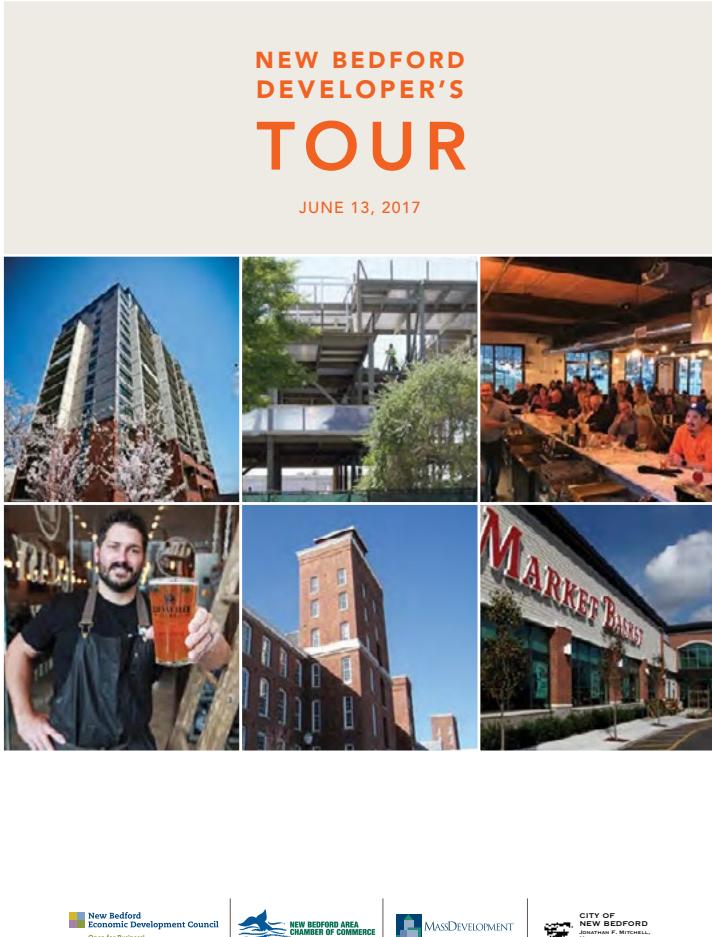
[Alexandra's Boutique](#) personifies Main Street's potential. Founded by Fatima Rodrigues, the bridal boutique carries the largest selection of custom designer wedding gowns in New England and an extension collection of formal wear. A Fall River native, Fatima's entrepreneurial vision has led her to lease or acquire five separate buildings on Main Street. The most recent is the [Capitol Theater](#), which opened in 1926 and was designed by Maude Darling Parlin, the city's first female architect and the first female graduate of MIT. The building's entry level now serves as a dedicated showroom for the Jovani brand and the company intends to revive the once elegant 1,500 seat theater as an iconic event space.



From top: a historic photo of the Capitol Theater. Founder Fatima Rodrigues and others gather as Mayor Jasiel Correia undertakes the ribbon cutting of the renovated theater building. The interior of the new Alexandra's Too/Jovani showroom, on the restored entry level of the theater.

- Profile who is there already and show their impact.

### 3) Examples / Best Practices: *New Bedford Developer's Tour*



**NEW BEDFORD  
DEVELOPER'S  
TOUR**  
JUNE 13, 2017

The booklet features a collage of six images: a modern high-rise building, a construction site with steel beams, an interior view of a restaurant with people at tables, a man holding a beer in a brewery, a brick building, and the exterior of a Market Basket supermarket.

**Logos at the bottom:**  
New Bedford Economic Development Council (Open for Business)  
NEW BEDFORD AREA CHAMBER OF COMMERCE  
MassDevelopment  
CITY OF NEW BEDFORD  
JONATHAN F. MITCHELL  
MAYOR

- 38 pages total
- Intros from MassDevelopment and Mayor
- Tour day program, property profiles and maps
- New Bedford summary information - history, industries, culture, momentum, contact info

#### The New Downtown



Throughout our history, New Bedford has always been a creative and diverse community. During the 19th century, when the whaling industry fueled New Bedford's economy, acclaimed artists, such as Albert Bierstadt, William Bradford, Albert Pinkham Ryder, and Clifford Ashely lived and worked in this cosmopolitan seaport.

Today, New Bedford's downtown is the arts and culture center of the SouthCoast of Massachusetts, boasting a wide array of attractions and diverse venues that showcase the historic, artistic, and cultural fabric of a community that is home to hundreds of artists and performers contributing to our distinct seaport identity.

Downtown is home to nearly 600 establishments, with over 6,500 employees, and \$500 million in annual business sales. Regional business clusters exist in printing and publishing, depository institutions, real estate, legal services, accounting and consulting services, and administration of human resource programs. There is a strong potential to build clusters in health services, educational services, and eating and drinking establishments.

**ADRIAN TIO, FORMER DEAN OF THE UMASS DARTMOUTH COLLEGE OF VISUAL AND PERFORMING ARTS**

Competitive advantages include developable space, the National Park, existing business and arts and culture clusters, parking and public transportation, proximity to the working waterfront, and superior access to large regional consumer and business markets.

Since 2007, 60 businesses have opened or expanded in downtown New Bedford. We see that trend continuing with a new hotel, 4 additional establishments and residential projects scheduled to break ground or open in the next year.

30 NEW BEDFORD DEVELOPER'S DAY AND TOUR / 2017

\*Materials and tour organized by NBEDC and TDI Fellow, Jim McKeag, in coordination with a graphic designer.

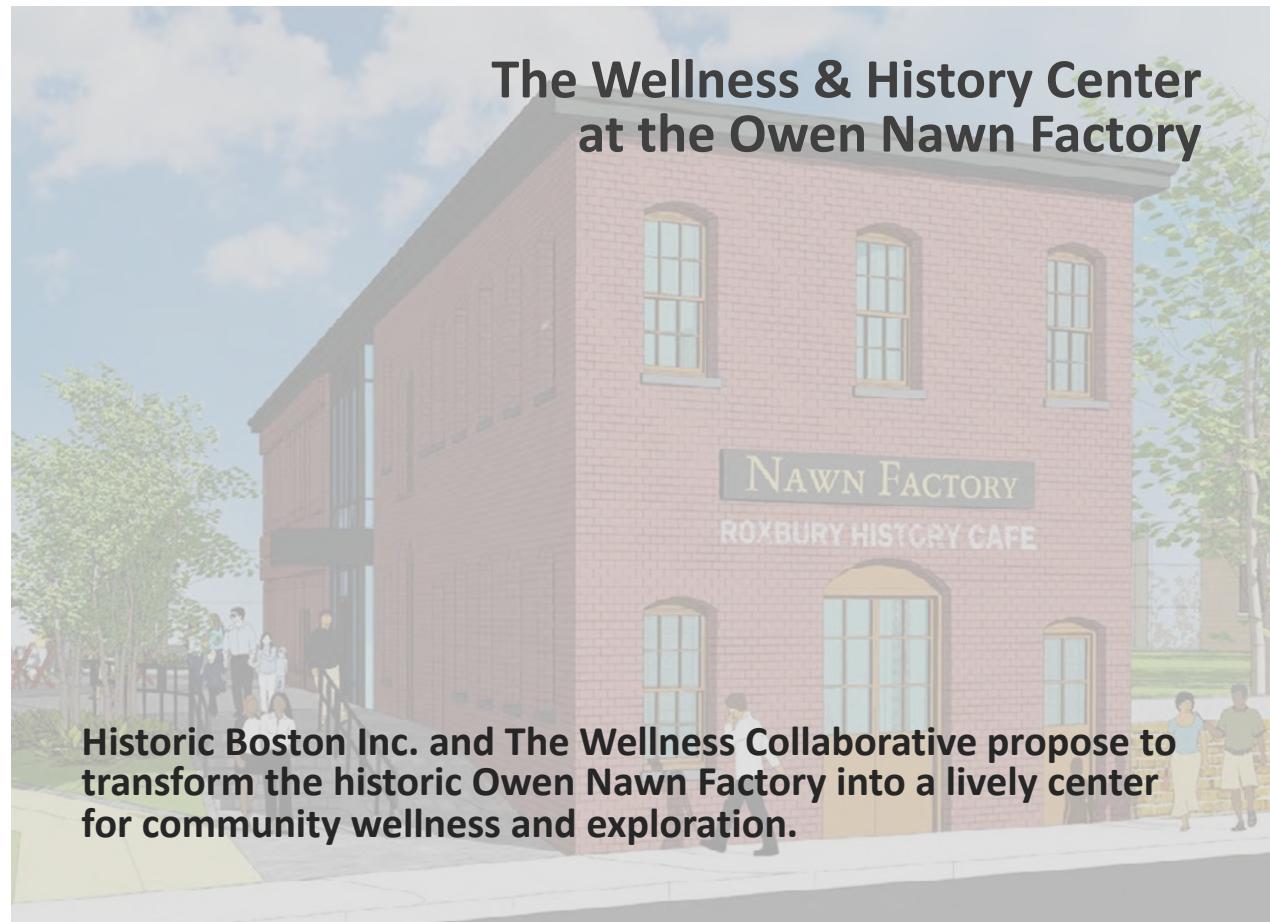
### 3) Examples / best practices: Owen Nawn Factory, Roxbury

Full context and links to RFP and presentations: <http://www.bostonplans.org/planning/planning-initiatives/plan-nubian-square>

BPDA + Historic Boston Inc.

[https://historicboston.org/portfolio\\_page/owen-nawn-factory/](https://historicboston.org/portfolio_page/owen-nawn-factory/)

- Process involved the Roxbury Strategic Plan Oversight Committee
- Two responses were evaluated



## 4) Recommendations

### VISION:

1. **Be people centric!** Show vibrancy - people doing things and enjoy themselves. Let your existing entrepreneurs and civic-minded citizens be your storytellers. Support **first person storytelling** with data.
2. **Quality and content** of photos (and video) matter.
3. Focus on articulating your **community vision** and you will attract developers/investors/businesses well matched with your community values.

### OPPORTUNITY:

4. Decide how detailed of information you want to include, in part based upon what you want to spend on assembling it.

### EXPECTATIONS:

5. Map out ideal incentives and community benefits in advance.
6. Clear and efficient process: *make submissions electronic if possible.*

## 4) Recommendations - budget items for consideration:

See also notes in draft proposal PDF.

### RFP Development:

		Low	High
1	RFP Consultant to oversee writing and editing the document, RFP promotion & public presentations*	\$7,000	\$10,000
2	Graphic design and building + context photography	\$3,000	\$5,000
3	3-d scan of buildings	\$10,000	\$15,000
4	Supplemental condition assessment of buildings if required	\$5,000	\$10,000
5	Market study (can benefit entire district, Town, etc.)	\$5,000	\$10,000
6	Legal review	\$3,000	\$5,000
		<b>\$33,000</b>	<b>\$55,000</b>

\*Assumes Town/EDC will lead RFP administration

### RFP Promotion:

7	Email list development	\$0	\$1,000
8	Determine appropriate list servs and social media through which announcements can be shared (MHC, MassDev, etc) as well as coordination with commercial real estate firms	\$0	\$1,000
9	Advertising	\$0	\$1,000
10	Site visit + Community Conversation/networking: 1/2 day program, inviting all on a guided tour of the building, meet with MHC rep, MassDev Rep, local business owners, Town Staff, etc. Town staff or reps present key market data; local business owners/developers speak on their success and working with the community. Could also include tax credit specialists, lenders, etc. and ask them to speak briefly on key topics. Serve food/bev and encourage informal networking.	\$0	\$1,000
11	Printing	\$0	\$1,000
12	Consultant time for site visit event and coordination	<b>\$2,000</b>	<b>\$3,000</b>
		<b>\$2,000</b>	<b>\$8,000</b>

Preliminary estimate of costs, ranges:

**\$35,000    \$63,000    \$49,000**  
Average

### Other potential costs:

Commercial real estate broker referral or transaction fee

*see notes*