PROPOSED SCOPE OF WORK
BURLINGTON MALL ROAD: DISTRICT PLAN

May 21, 2021

Introduction

The Burlington Mall Road District began to take shape as a regional retail center in the 1960s and transformed to a highly desirable mixed use district with anchor institutions, commercial offices, and amenities by the 1980s. Today, the crossroads of Route 128 and Route 3 has become one of the strongest sub-markets in the region. In a dynamic metropolitan area, other centers have also become powerhouses, building on strong connections to life sciences in Kendall Square, Longwood Medical Area, and more recently Harvard University's Enterprise Research Campus in Allston. New technologies in life sciences, additive manufacturing, and other industries have redefined facility needs. Over the years, market preferences have shifted from auto-oriented development patterns to more dense, walkable, inclusive environments, with an even greater mix of uses and a focus on transit and placemaking. This steady trend was interrupted by the COVID-19 pandemic, which has emphasized the need to plan for flexible, dynamic environments that can accommodate many possible adaptations to how we work, research, shop, and live.

MassDevelopment has awarded a Site Readiness Grant to the Town of Burlington to consider the potential of the Burlington Mall Road area, addressing market and economic factors, development opportunities, and the future character of the district. Charting a course for the future entails strategic engagement, input, and support from many stakeholders across a spectrum ranging from real estate developers to town residents. A district plan at this point in time will help the Town establish the zoning and regulatory framework to shape future development in a way that is tailored to market realities and civic goals. District plans also communicate Town aspirations to property owners, real estate developers, businesses, and entrepreneurs interested in investing in the Town and growing the workforce. With a clear sense of private development potential, the Town can also advocate for and invest in public infrastructure, such as parks, streetscapes, transit, utilities, and environmental protection and restoration, among others.

The study area is shown on the attached plan and is generally bounded by Blanchard Road, Route 3, Route 3A, and the Burlington Mall Road. The context for this study area is equally critical, including surrounding uses and destinations, anchor institutions such as the Northeastern University Innovation Campus, aquifers, municipal wells and natural systems such as Vine Brook, transit connections to Alewife Station, Lowell, and Lexington, and the residential location and commuting patterns of employees and other visitors.

Project Team

Madden Planning Group, led by Kathryn Madden, provides economic development and planning services, and has extensive experience in community engagement and implementation strategies. Her work with towns and cities across Massachusetts, New England and other parts of the country has

resulted in investment and transformation of many underutilized districts, fulfilling community and economic development goals. The approach to the work in Burlington will be informed by recent projects including the Worcester Biomanufacturing Action Plan, Watertown Economic Development Strategy, Bedford Crosby District Market Study and Strategy, Leominster Manufacturing and Site Study, Dartmouth-Hitchcock Medical Center Real Estate Strategy, and the implementation of the Foundry collaborative community center in Cambridge.

Julia Carrasquel is a planner and entrepreneur with experience in the innovation economy. Working closely, with Ms. Madden, Ms. Carrasquel will research industry clusters, employment factors, and precedents. Currently based in Kendall Square, Ms. Carrasquel has recently been the Vice President of Operations for a start up company and brings experience in market positioning, identity, and data visualization. She conducted her masters research in diversity in the tech economy under the supervision of Ms. Madden at Clark University.

Led by Jon Trementozzi, **Landwise** is a real estate and economic advisory firm with national experience and intimate knowledge of the real estate market in the Boston metropolitan area. Landwise has collaborated with Madden Planning Group on many projects, including the Crosby District Market Study, a 2012 study for the Worcester State Hospital site, the Leominster Study, and a property disposition strategy for the Town of Shrewsbury.

Gamble Associates is an urban design and architecture firm, led by David Gamble. Gamble Associates has developed design guidelines for many communities in New England, is actively involved in the design of several redevelopment projects, and recently completed the Hartwell Corridor Study in Lexington. The principals of Madden Planning and Gamble Associates have worked on many projects together including the Watertown Economic Development Strategy, Stamford VITA Health and Wellness District, the Buffalo-Niagara Medical Campus and Neighborhood Plans, and the Dartmouth-Hitchcock Medical Center Real Estate Strategy.

The proposed work plan is outlined below.

Work Plan

1. Project Overview and Site Assessment

a. **Project Management**: Meet with the Town staff and MassDevelopment to refine the goals and objectives and logistics of the study as necessary, including the stakeholder engagement process. Establish key participants and groups and appropriate milestones for convening these stakeholders. Establish a regular schedule for meetings with Town staff and MassDevelopment to establish good communication and collaboration. With the Town, reach out to MAPC to establish any coordination and collaborative efforts as appropriate.

b. **Available Documents and Regulatory Framework**: Review previous planning documents, and utility information; review recent ULI Virtual Project Analysis. Review zoning and land use regulations to identify key factors that might affect future development.

c. **Property and Spatial Data**: Assemble assessors data and GIS mapping and other sources of spatial information. Develop a detailed inventory of property owners and commercial tenants in the district by type, floor area, vacancies, and other attributes, and spatially link this to the GIS and Illustrator base maps.

d. **Site Analysis**: Conduct field reconnaissance to understand scale, relationships, condition, character, and connections in the district and the relationship to surrounding areas and features, documenting with photography and field notes. Review the natural systems that affect the study area, including topography, Vine Brook, aquifer, and municipal wells; built form; and infrastructure systems, including utilities, communications, and mobility. Note COVID impacts, current vacancies and available properties, parking patterns, and mix of uses and retail types.

e. **Engagement**: Engage in an initial conversation with the Economic Development Liaison Group to identify broad goals for future development and re-development. Pending social distancing, smaller in-person meetings may be possible by mid to late summer.

Deliverables:

- *Project management data including updated schedule and list of project participants*

- *Site analysis maps for the study area showing natural systems, built form, and infrastructure*

- *Property data for the study area, spatially linked and updated based on field reconnaissance and information from available documents*

- *Summary of community conversations highlighting key issues, ideas, and data*

- *Meetings:*
  - *Regular meetings with the client group via zoom (estimated every three weeks);*
  - *Stakeholder session with the Economic Development Liaison Group via zoom.*

2. Economic and Market Conditions

a. **Competitive Advantages**: Identify key assets that position the district for future growth and development including regional access, visibility, anchor institutions, workforce, and other physical and economic factors. Summarize other considerations that may affect the district, such as adjacent residential and commercial areas; well fields, wetlands, waterways, and other natural systems; highways, and infrastructure; and the image and identity of the area.

b. **Engagement**: Engage in a series of one-on one and small group interviews with real estate developers, property owners, large employers, commercial realtors, and economic development entities to solicit initiatives, concerns, and other input regarding recent real estate market trends, planned projects, vacant space, supply gaps in the marketplace, competing growth areas/submarkets, commuting patterns, development constraints, and planned infrastructure. We anticipate that these meetings will likely be held via Zoom in this initial phase.

c. **Economic Potential:** Identify potential industry clusters that build on Burlington's strengths and competitive advantages and position in the region, contributing to the overall regional economic

growth in the area, as well as nascent industries that have potential for growth in a smart, environmentally friendly manner, such as green energy technologies, medical technology, and other industry trends. Identify typical expectations for building, service, infrastructure, and operational requirements to meet likely demand from key industry clusters and future flexibility and adaptation. This work will draw on the team's recent experience in the Boston, Cambridge, and Route 128 and Route 3 Corridors, existing industry mix in the area, recent transactions in the Burlington sub-market, current trends related to COVID, innovative projects, and other sources.

d. **Real Estate Market**: Analyze the trends for commercial real estate in Burlington and surrounding areas to identify commercial real estate demand among key economic sectors and potential development opportunities appropriate for Burlington. Data for the Burlington submarket will be compared with surrounding communities. Private real estate reports on the local real estate market will also be reviewed. In concert with the economic assessment, the market analysis will result in an understanding of the likely demand for various categories of commercial space (e.g., office, lab, research, manufacturing), desirable market amenities, and the competitive strengths and weaknesses of the Burlington market area relative to competing locations.

e. **Employment Factors:** Analyze employment supply and demand based on potential commercial development projections, education levels, quality of life, community patterns, and possible impacts of COVID on remote work.

Deliverables:

- *Summary of real estate and economic development conversations highlighting key issues, ideas, and data.*

- *Powerpoint presentation documenting market analysis, competitive advantages, industry clusters, facility attributes, and employment factors and including a summary of strengths, weaknesses, opportunities, and threats (SWOT)*

- *Catalogue of data generated and collected*

- *Meetings:*
  - *Regular meetings with the client group via zoom (estimated every three weeks)*
  - *Stakeholder sessions (up to ten) via zoom with real estate developers, property owners, and economic development entities via zoom in small group meetings.*

3. **Development Opportunities**

a. **Precedents**: Research a variety of other redevelopment, infill, and placemaking projects both locally and nationally that can inform the future of the Burlington Corridor. This task will draw from current trends on retrofitting suburbia as well as other innovative redevelopment and placemaking ideas.

b. **Potential Development Program:** Develop a programmatic model for a market supportable mixed-use community for the District that includes market rate uses such as retail, restaurant, office, hospitality, and residential. The model will rely on current inventory and future supply data and define the market audiences for each use to determine the level of unmet demand.

c. **Site Opportunities/Economic Scenarios**: Identify potential areas for infill and/or redevelopment taking into consideration facility sizes and configuration for various industries and uses, including structured and shared parking and array these against a range of economic scenarios. Zoning designations, building age, and size of floorplates will also be noted in relation to future flexibility and adaptation for various industries.

d. **Infrastructure Framework**: Based on available information from the Town and previous studies, identify district infrastructure needs and key issues, especially as it relates to capacity requirements and gaps, if any, to accommodate key industry clusters, addressing energy and utilities (water, sewer, gas, electric, and telecommunications), transportation systems, and accommodation of natural systems such as Vine Brook.

e. **Engagement**:
   - Convene Economic Development Liaison Group and real estate and property owner stakeholders to review and test findings from market and economic analysis, discussing appetite for change among owners and investors, among others.
   - Prepare for and lead a community forum to share findings from the site, economic, and market analyses and to discuss goals related to the future for development and re-development. Examples of other places will be shared to spark discussion and help participants image the possibilities and potential in Burlington. Urban design, landscape design, transit, innovative industries, energy, climate adaptations, inclusion can all be part of the discussion. Work with the Town to identify outside guests such as futurists, whom the Town could invite as keynote speakers.

Deliverables:

- *Powerpoint presentation that assembles mapping and illustrative materials to document site and economic opportunities, infrastructure framework, and precedents, along with supporting data and analyses*

- *Community development and design principles that synthesize community input, along with documentation of other issues and ideas.*

- *Meetings:*
   - *Regular meetings with the client group via zoom (estimated every three weeks)*
   - *Stakeholder meeting with the Economic Development Liaison Group via zoom (one session)*
   - *Stakeholder meeting with real estate entities and property owners via zoom (one session);*
   - *Community forum (one session, in person, if possible, otherwise via zoom)*

4. Redevelopment Scenarios

a. **Visualization:** Working from the GIS base maps, create 3D base model to visualize existing and potential development based on the findings of the economic and real estate market tasks.

b. **Design**: Create up to three (3) massing variations for catalyst sites to demonstrate the potential transformation and character of infill development, taking into account development densities, new uses, landscape interventions, and circulation/connectivity goals. Redevelopment scenarios will reflect a number of land use configurations. Assumptions will likely be made about parcelization, phasing, and internal circulation. Capacity studies will focus on site access, parking, massing, heights and opportunities for public realm and open space.

c. **Engagement**: Review development scenarios with the Economic Development Liaison Group and real estate and property owner stakeholders; hold a community forum to discuss potential futures and implications for implementation strategy.

d. **Preferred Scenario**: Advance a preferred design framework with diagrams and views of the area's transformation over time to guide future development decisions and implementation strategies.

Deliverables:

- *Powerpoint presentation that provides graphic support for developer presentations and potential public meeting; including preferred site master plan and options for redevelopment / 3D computer model and building/site and open space diagrams on scaled site plan*

- *Five (5) freehand perspective drawings from key vantage points around the project area*

- *Meetings:*
  - *Regular meetings with the client group via zoom (estimated every three weeks);*
  - *Stakeholder meeting with Economic Development Liaison Group (one session via zoom)*
  - *Stakeholder meeting with real estate entities and property owners via zoom (one session via zoom);*
  - *Community forum to review scenarios and identify preferred concepts and refining design and development principles (one session, in person, if possible, otherwise via zoom).*

5. Implementation Strategy and Plan Documentation

a. **Regulatory Framework**: Identify zoning elements that are creating barriers for redevelopment and make recommendations regarding overall approach as well as zone delineation, use, form, and dimensional standards, design principles, and parking requirements. The intent will be to create a more predictable and transparent process that integrates Town goals, market realities, and future potential.

b. **Infrastructure Strategy**: Based on the conceptual planning process and with input from entities such as MAPC, identify priorities and needs for public infrastructure improvements such as landscape and environment restoration, streetscapes, transit, and utilities, and identify likely funding sources as well as public/private partnership strategies.

c. **Partnerships and Initiatives**: Summarize ideas and discussions developed during this process related to collaboration, marketing, joint initiatives, land acquisition, and/or use of economic development tools to incent new development, as necessary.

d. **Roles and Priorities**: Working closely with the Town, establish an overall agenda and set of priorities for moving forward, including the development of key metrics and goals to track over a 3, 5, and 10-year period. Clarify the roles and responsibilities of different entities in relation to the district plan and recommended strategies.

e. **Draft and Final Illustrative Report**: develop a draft and final report that documents the findings and helps to position and promote the Burlington Mall Road District to potential funders, developers, and likely end users. The report will integrate opportunities and constraints, vision and goals, economic and real estate market analyses, redevelopment scenarios and plans, and implementation strategies. The final format of this report will be developed in conversations with the client.

f. **Engagement**: Meet with the Town staff and MassDevelopment to develop the implementation strategy, testing ideas with key stakeholders, as necessary.   Prepare for a final presentation of the plan to the Town and participate in a format to be determined by the Town.

Deliverables:

- *Draft and final illustrative report that integrates all elements of the work in narrative text and graphic layout in a digital PDF format; along with summary material suitable for online posting*

- *Powerpoint presentation as an executive summary highlighting the analysis, plan, and implementation strategies.*

- *Technical reports and data compiled into an appendix (digital copy)*

- *Meetings:*
  - *Regular meetings with the client group via zoom (estimated every three weeks)*
  - *Final presentation to the Town.*

Project Schedule and Budget

The project is expected to begin in late June 2021 and be completed by late January 2022. A proposed schedule of the workflow is attached. Informal stakeholder meetings are anticipated during Summer 2021, working to accommodate summer schedules. Community forums are planned for the end of September 2021 and early November 2021. A final presentation would occur in early January 2022.

For the tasks described in the Scope of Work above, the consultant team estimates a total fee of $115,000 including fees and expenses. The fee breakdown by task is as follows:

Task 1. Project Overview and Site Assessment	$13,000
Task 2. Economic and Market Conditions	$26,100
Task 3. Development Opportunities	$22,800
Task 4. Redevelopment Scenarios	$28,200
Task 5. Implementation Strategy and Plan Documentation	$24,900
TOTAL	$115,000

This project is strategic in nature, but may trigger further in-depth studies as the work progresses or at the end of this phase of the work. The Consultant Team would be pleased to provide additional services or additional meetings to support this effort, on a time and expense basis or based on a budget developed in relation to the specific tasks needed.