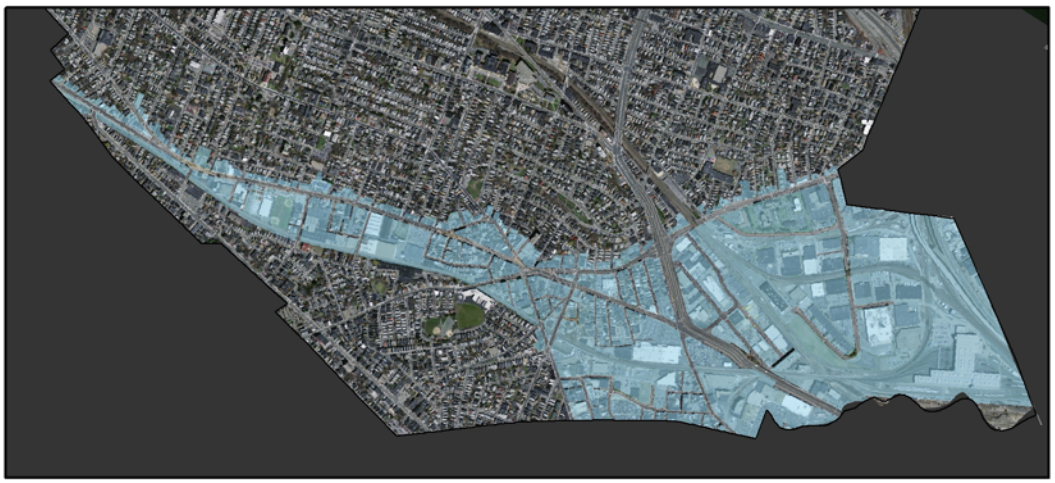
OFFICE OF BUSINESS DEVELOPMENT
M.G. L. c. 40Q and 402 CMR 3.00

LOCALLY DRIVEN PUBLIC FINANCING ALTERNATIVE TO FUND PUBLIC WORKS, INFRASTRUCTURE AND DEVELOPMENT PROJECTS

Commonwealth of Massachusetts
District Improvement Financing Program

District Application
Pursuant to 402 CMR 3.00

Somerville DIF



Submitted by the City of Somerville
Mayor's Office of Strategic Planning and Community Development

Draft as of 9/23/2010

Section 1.1 Applicant Information

Applying City or Town: City of Somerville

Applying Entity: Office of Strategic Planning and Community Development

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Section 1.2 Application Information

District Name: Somerville DIF		**Duration:**	30 Years
Program Name: Somerville DIF		**Duration:**	30 Years
IRD Name: Somerville DIF		**Duration:**	30 Years
IRDDP Name: Somerville DIF		**Duration:**	30 Years

Section 1.3 Assessed Value Information

Certified, Original Base Assessed Value in the District: $933,534,500

Certified, Original Base Assessed Value in the IRD: $933,534,500

Executive Summary

In a few short years, Somerville will be home to at least 6 new rapid transit stations when taking into account the Green Line Extension (GLX) and the Orange Line Station at Assembly Square. This investment in rail infrastructure has the potential to transform Somerville for the better as 85% of residents will live within a ½ mile radius of rapid transit where only 15% of residents live so close today. In addition to providing improved access for residents, the transit investment will open up land for millions of square feet of new development opportunity.

However, several significant hurdles will need to be addressed before the full development potential of the city can be realized. These hurdles include very aged infrastructure (over 100 years old in many locations), small and irregularly shaped parcels held by an array of property owners, extensive areas of brownfields, little or no vacant land, and a series of underutilized properties and an existing mix of businesses that are becoming increasingly obsolete. Somerville has experienced the negative impacts of its undersized infrastructure during the July 10, 2010 flood in Union Square and parts of East Somerville. The private sector which is cautious of investing its monies, especially in the current economic environment, will want some assurances that these issues will be addressed.

District Improvement Financing (DIF) provides Somerville with an important tool to ensure that the infrastructure improvements are made and catalyst sites are developed. DIF is used in 48 states in the U.S. and has been in use for nearly 50 years (in other states it is often called "tax increment financing", but that term is already in use in Massachusetts for another program). By adopting a DIF boundary and a financing plan, the City is committing to reinvest the growth in property tax generated by the DIF District within the district over the next 30 years. Not only can this commitment leverage other public dollars, such as grant funds, but as seen in cities across the U.S., it can stimulate the private sector to also invest in the area. Over time, as the DIF district moves forwards, its benefits will be seen in the improved infrastructure, new buildings, increased and improved open space, and the many new workers going to lunch and hopefully enjoying music and other programming in the community gathering places within the DIF.

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Section 2.3 Municipal Description

A general description of the Municipality. The intent is to familiarize the EACC with your community so that they have a context in which to understand the Application. A recent or updated copy of a rating agency general obligation bond report could complete this subsection.

Background

As a result of the Green Line Extension and the Orange Line Station at Assembly Square, Somerville is on the cusp of having rapid transit re-introduced into its compact urban fabric, offering a once in a lifetime opportunity to reinvigorate its economic base. Throughout its history, prosperity in Somerville has been inextricably linked with rail. In its early years as a town and city, growth in Somerville was directly related to the rail and trolley lines traveling through its borders. When rail service was eliminated and public investment turned toward auto-related infrastructure, jobs left the Somerville by the thousands and residential outmigration occurred. Construction of the Davis Square MBTA Red Line Station in 1984 produced a resurgence of that neighborhood and recognition is strong in Somerville that increasing transit access is the way of the future.

Although transit will certainly stimulate economic opportunity, considerable impediments exist today that must be addressed to truly capitalize on the upcoming transit investment. These impediments include aged infrastructure, small and irregularly shaped parcels held by an array of property owners, extensive areas of brownfields, little or no vacant land, and a series of underutilized properties and a mix of businesses that are becoming increasingly obsolete. District Improvement Financing (DIF) will be one important mechanism to address these impediments, but the City intends to aggressively leverage DIF funds and seek other funding opportunities such as grants and public-private partnerships wherever possible.

Somerville's approximately 4.1 square miles of land area is home to more than 77,000 people and 2,100 businesses. Located next to Boston and Cambridge, Somerville is the most densely settled community in Massachusetts. More than half of the city's current housing stock was built prior to 1910 and two-thirds of Somerville's housing units are located in two- or three-family buildings. Formerly home to many industrial employers, it has increasingly become a bedroom community for Boston and Cambridge. It has a significant college and graduate student population (15% of all residents) and is also home to many recent immigrants – 14% of all Somerville residents entered the U.S. in 1990 or later.

HISTORY

The Early Years

By the early 19th century, Somerville was the location of important turnpike, canal, and railroad corridors to and from Boston. Until that time, Somerville was primarily used as grazing lands by farmers of Charlestown and contained only a few scattered settlements. The area first gained prominence when it served as a critical military position during the American Revolution.

The industrial revolution arrived in Somerville, just prior to its incorporation as a city in 1842. Industrialists capitalized on Somerville's natural resources and labor supply. The city quickly became home to a variety of industries, the most prominent including brick-making and meatpacking, in addition to the preindustrial revolution industries of dairy farms and stone quarries.

In addition to industrial growth, the introduction of new streetcar lines and rail stations contributed to Somerville's greatest period of population growth. Between 1870 and 1915, the population multiplied six times. By the early 1900s, the array of employment opportunities drew workers to Somerville, increasing the demand for housing. The City's population continued to grow and reached its peak during the Second World War with 105,883 people. Closely packed two-family

homes and triple-deckers were built throughout the city to house the population, many of whom worked in the wholesale slaughtering and meatpacking industries. This sudden boom in housing production created the dense residential fabric the city is known for.

The majority of Somerville's road network and infrastructure was laid before 1920 and contains 105 miles of roadway and 162 miles of sewer lines. At the start of the 20th Century Somerville was served by a four passenger rail lines as well as numerous street cars and horse cars. As private automobiles became cheaper and more readily available, Somerville's trolley system and street railways began to decline. By 1958, all passenger train service in Somerville had ended, replaced by intermittent busses running on many of the original streetcar routes.

Unfortunately, Somerville's early leaders did not follow the lead of cities like Boston and New York City relative to the creation of public parks and open space. In fact, the only two parks were dedicated (Central Hill Park and Broadway (Foss) Park) before the great housing boom which began in 1870. During the boom the only parks that were dedicated were Lincoln Park in 1900 and Trum Field in 1903. As a result only 4.7% of Somerville's land is dedicated to parks and open space. The lack of planning for open space seriously affects the city's quality of life.

Post War Decline

The building boom for homes continued until the 1940s, but was then followed by a period of industrial and population decline that lasted into the 1980s. Between 1970 and 1980, Somerville's population declined by 13%. Residents left the city for a number of reasons. The city, which had transportation links to Boston and Cambridge for industrial purposes, was no longer considered well connected to Boston and Cambridge in the 1970s, when compared to other suburbs. Disinvestment by property owners decreased the quality of the housing stock had deteriorated which could not compete with the expanding residential opportunities in the suburbs. The city also suffered from a general deterioration of its infrastructure. During this time, the city lost over 2,000 jobs, due in part to changes in the manufacturing industry as well as the departure of manufacturing and wholesale businesses in search of less-expensive land.

In the post war era, the Commonwealth's transportation plans focused on expansion of the highway system throughout the Boston metro area. Plans for the Inner Belt Expressway moved forward until community opposition halted the project. Unfortunately, this happened too late for the Brickbottom neighborhood of Somerville which had already been demolished. Despite vehement opposition by Somerville residents, I-93 was built through parts of east Somerville, eliminating many homes, severing the Assembly Square and Ten Hills districts from the rest of the city, and leaving many households to live within a few feet of the elevated structure. Consistent with this decision making, the McGrath Highway was expanded over time converting what was part of the Emerald Necklace, series of parks and open spaces, into a 6+ lane expressway dividing east Somerville from other parts of the city.

The dominance of the auto in public investment began to reverse by the late 1980s and early 1990s. As the MBTA worked to extend the Red Line beyond Harvard Square, Somerville residents, businesspeople, and public officials advocated for it to routed through Davis Square. The station has proven to be a catalyst for revitalizing Davis Square, promoting new commercial development and turning the area into an active shopping, dining and entertainment district while preserving the residential character of the neighborhood. The 0.5 mile Community Path, a shared pedestrian and

bicycle path, has been seen to be a significant contributor the revitalization by providing residents with accessible open space and a comfortable walk to the transit station.

The Return of Urban Neighborhoods

The end of rent control in Cambridge in 1995 coincided with economic recovery driven, in part, by the telecommunications and biotechnology industries. At the same time, baby boomers and their children began to appreciate the value of living in denser residential neighborhoods, located within walking distance of neighborhood commercial districts. The walkability of urban cities became a valued commodity. This caused housing prices to skyrocket in Cambridge and Boston and homeowners, prospective buyers and renters all looked to Somerville as a lower cost alternative.

In contrast, manufacturing and other industries have continued to leave Somerville for less expensive and more suburban locations. Developers transformed many industrial buildings to other uses, including office, residential and mixed-use buildings, and artist live/work spaces, often times at a net loss of jobs in the city. Nevertheless, remnant industrial pockets are still found in operation scattered throughout the residential and retail districts, in addition to concentrations within the larger industrial areas such as Boynton Yards, Brickbottom and Inner Belt.

Over time, Somerville's cultural attributes have become more accessible and attractive, leading to increasing recognition of it as a welcome environment for artists and the creative industry. Improvements to Davis Square, an active artist community, and the promotion of arts and culture throughout the city helped spawn ArtBeat, the reopening of the Somerville Theater, a successful Open Studios program, and, most recently, the Union Square Design Annex.

TRENDS IN SOMERVILLE

Somerville is a microcosm of all of the benefits and challenges that can be found in urban communities across the U.S. It has a tightly knit, tightly packed and diverse population, faces challenges with the availability of affordable housing, has seen the number of jobs decline, especially jobs in high paying industries, presently has inadequate transportation resources, and has a considerable amount of land area occupied by outmoded industries and brownfields. Despite this, Somerville is moving forward actively seeking new transit resources and laying the groundwork for a future that incorporates increased economic activity. This DIF plan will help ensure that the groundwork is properly laid.

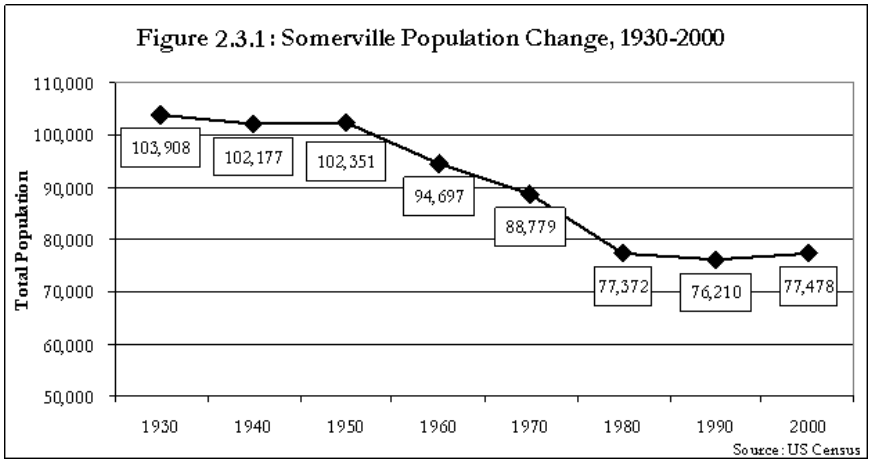
Population Trends

Somerville's population has exhibited remarkable dynamism throughout the city's history. Rapid growth occurred in the late nineteenth and early twentieth centuries, as industry expanded and new residential neighborhoods were developed. During the second half of the twentieth century, population losses occurred, mirroring trends among urban communities around the country. In the new millennium, Somerville's population has stabilized, but profound shifts in demographic characteristics such as family size, age, ethnicity, education, and income have occurred.

Total Population

Somerville's population reached its historic peak in 1930, when the US Census reported 103,908 residents. However, significant population decreases (-24%) were recorded between 1950 and 1980, resulting in a community that had nearly 25,000 fewer residents in 1980 than in 1950.

The city's population reached its low point as of the 1990 Census, which recorded 76,210 residents. By the 2000 Census, Somerville's population took a slight upturn to 77,478, an increase of 1.7% from 1990. Population increases during that period are at least partially attributable to immigration given that Somerville's foreign-born population doubled as a percentage of the total population between 1970 and 2000. While Somerville gained population during the last decade, its growth (+1,268 persons, or +1.7%) was significantly less than the metropolitan core (+3.1%) or the state as a whole (+5.5%). The large neighboring cities of Boston and Cambridge also exhibited greater percentage growth than Somerville did.



Population Density

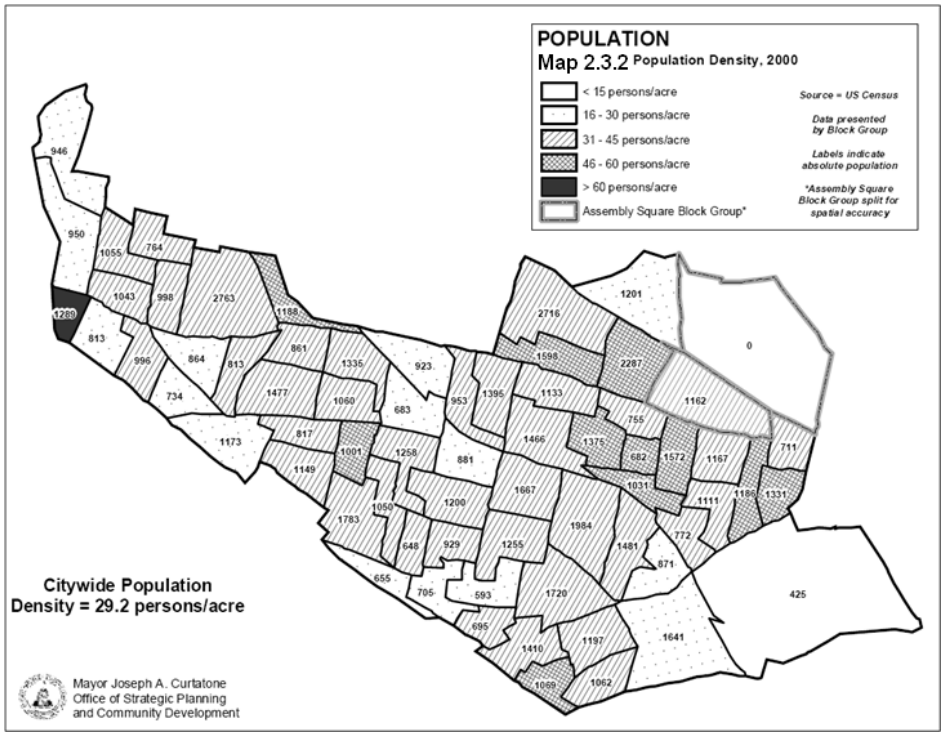
With a relatively large population and relatively small area (4.1 square miles, or 2,624 acres), Somerville's population density is the highest among New England municipalities (18,879 persons/square mile, or 29.5 persons/acre). Among its immediate neighbors, only Cambridge approaches Somerville's population density. Chelsea, which does not immediately border Somerville, boasts the second-highest population density in Massachusetts at 25.2 residents per acre.

Figure 2.3.2: Population and Population Density, 2000

	Total Population, 2000	Land Area, Square Miles	Persons/ square mile	Land Area, Acres	Persons/ acre
Somerville	77,478	4.1	18,897	2,649	29.2
Chelsea	35,080	2.2	15,945	1,394	25.2
Cambridge	101,650	7.2	14,118	4,587	22.2
Boston	592,347	48.1	12,315	30,788	19.2
Malden	56,340	5.1	11,047	3,247	17.4
Everett	38,037	3.4	11,187	2,205	17.3
Arlington	42,389	5.4	7,850	3,481	12.2
Medford	55,766	8.5	6,561	5,426	10.3

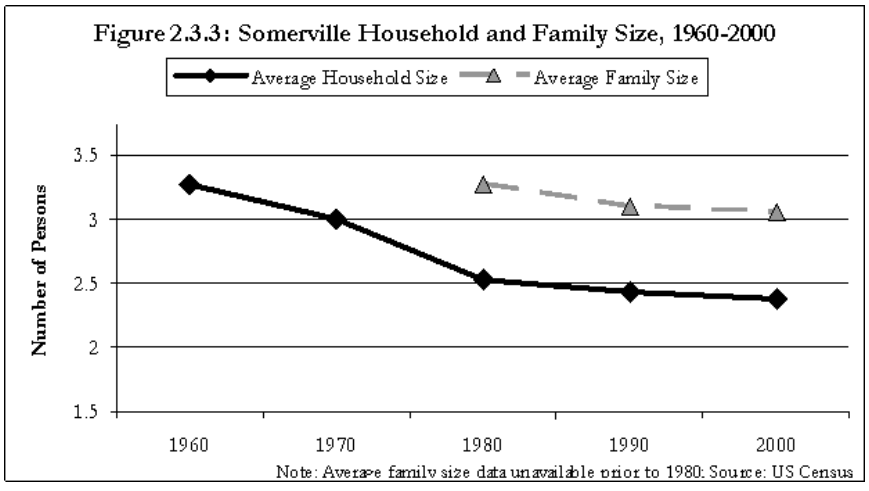
Source: US Census

Somerville's population density is not evenly distributed across the city. The 2000 Census reported that 50 of Somerville's 67 Block Groups had population densities above the citywide average. Particularly dense areas of the city, including Ball Square, East Somerville, Gilman Square, Inman Square, Spring Hill and Winter Hill contain 40-60 persons/acre. This density is made possible by the housing stock in these areas which was originally located near streetcar tracks. The Green Line extension through many of these neighborhoods will make this populous area transit rich again.



Household and Family Size

Household and family size has consistently declined in Somerville during the last forty years. As shown by Figure 2.3.3, average household size and average family size in Somerville have been steadily decreasing in recent decades, reaching 2.38 persons per household in 2000. This trend is in keeping with the rest of the United States, as families have fewer children, divorce becomes more common, and individuals remain single until later in life. This has important ramifications for educational needs, labor force and housing demand.

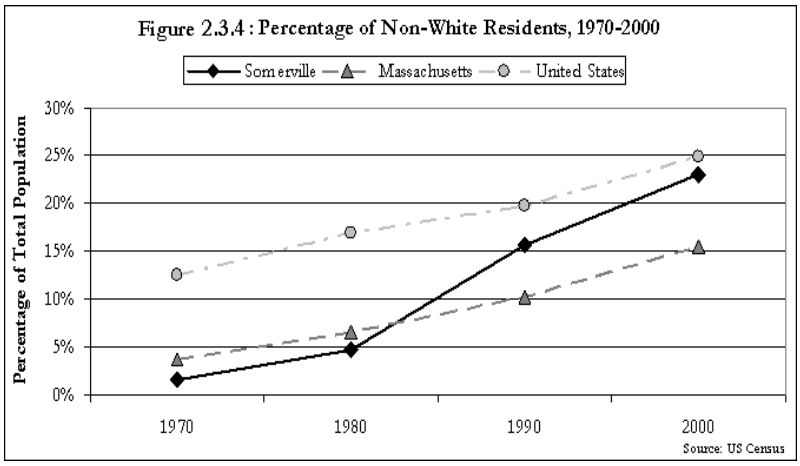


Race, Ethnicity, Origin and Language

During the 1980's, growth in Somerville's minority population was more pronounced than that experienced at national or state levels. This may be partly attributable to changes in total population - Somerville's total population was essentially constant between 1980 and 1990,

while Massachusetts and the United States experienced population growth of +4.7% and +9.8%, respectively.

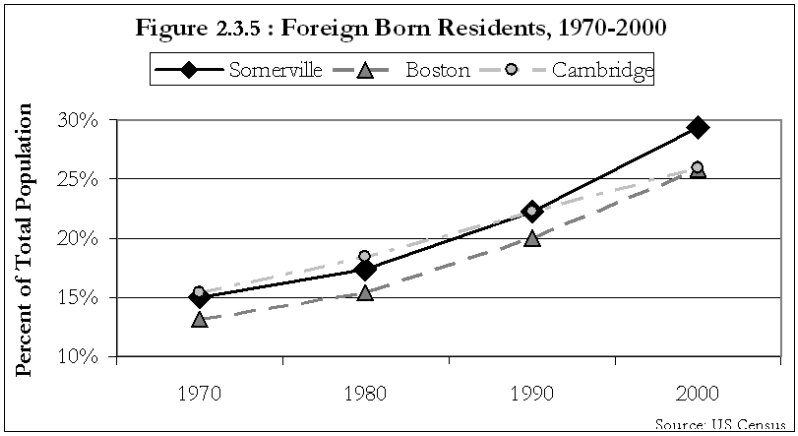
All three major racial/ethnic minority groups increased in Somerville during the 1980's. Somerville's Hispanic population increased from roughly 2% to roughly 8% of the population, while the Black population increased from 3% to 6% of the total. The Asian population increased from less than 1% to nearly 4% of the total.



Between 1990 and 2000, the minority population continued to increase as a percentage of the total population (from 11% to 23%). However, as illustrated in Figure 2.3.4, Somerville's increase during the 1990's was more consistent with state or national trends during that decade.

Somerville has long been a magnet for immigrants. According to the 2000 U.S. Census, foreign-born residents represented nearly 30% of Somerville's total population. Foreign-born residents have doubled as a percentage of Somerville's population since 1970. While neighboring communities show similar trends (Figure V-6b), Somerville experienced a sharper increase in its immigrant population during the last two decades than Boston or Cambridge did.

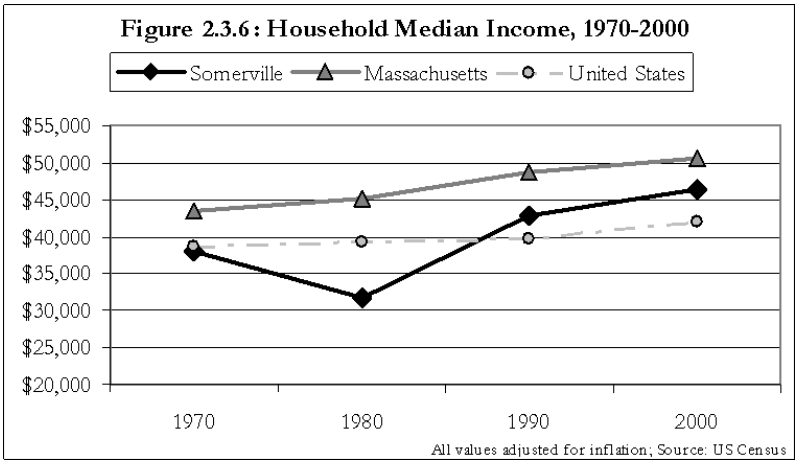
Not surprisingly, according to the 2000 Census, at least 25 languages are spoken in Somerville. Those most commonly spoken include Portuguese (8,932 residents) and Spanish (5,794 residents). Smaller, yet significant, populations of Haitian-Creole (2,023), Italian (1.786), and Chinese (1,639) speakers are also present.



Income

Following decreases in real income between 1970 and 1980, Somerville's inflation-adjusted median income values have increased at the per capita, household and family scales. Figure 2.3.6 illustrates trends in household median income at the local, state and national scale. Somerville's sharp decrease between 1970 and 1980 may be partly attributable to out-migration of wealthier households during the 1970's, combined with the near-stagnant wages that characterized the 1970's. Between 1980 and 1990, Somerville experienced a significant increase in household median income, while the statewide gain was more modest and the national median remained constant.

Poverty in Somerville over the last three decades has generally exhibited minor fluctuations. Somerville's poverty rate increased sharply between 1970 and 1980 and then remained fairly constant between 1980 and 2000, hovering between 12% and 13% of households. In 2000, the U.S. poverty rate was just over 11% and the Massachusetts rate was less than 10%.

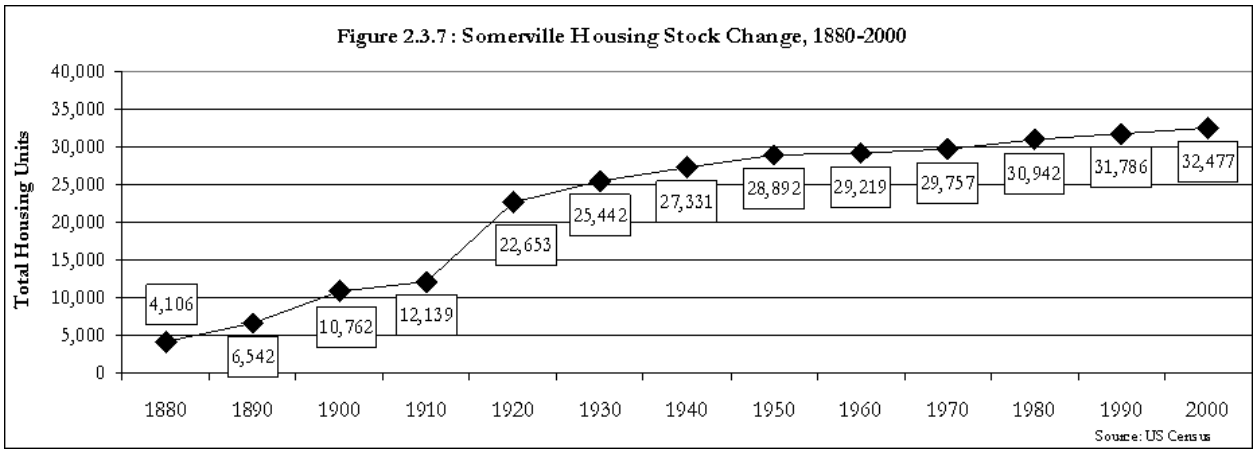


Housing Trends

For much of Somerville's history a large portion of its land area has been used for residential development. Today, Somerville contains a sturdy housing stock given that the majority of homes were built prior to 1940, however, these structures are in need of regular maintenance and are not easily adaptable for ADA access. In addition, while rents remain affordable in many areas of the city, units are affordable for the most part because they are leased at reasonable rates. With improved transit access, potential exists for considerable escalation in housing prices

Housing Stock

After Somerville's incorporation as a city in 1872, rapid housing construction occurred. A major spike in housing growth occurred between 1910 and 1920, when a construction boom resulted in a net change of 10,514 units nearly doubling the number of units that existed prior to that date. By 1940, 27,331 units existed – over 84% of the units found in the 2000 census. Between 1940 and 2000 only 5,146 units (+19%) were added at the same time the population decreased from 102,177 (1940) to 77,478 (2000).



An aging housing stock has characteristics both positive and negative for a city. Older houses require more upkeep. Their utility and water systems are generally less efficient than the systems in newer units, and structural damage is more difficult and expensive to repair. On the other hand,

many of the materials used in turn of the century construction are of higher quality than those used today. Most significantly, the architecture and design of older homes offers more character and a historical feel that is valuable both to the owner, the neighborhood and the city as a whole.

Residential Density

With 32,477 housing units occupying a gross land area of only 4.1 square miles (2,649 acres), Somerville's overall housing density is calculated at 7,921 units per square mile (12.3 units per acre). Data from the 2000 US Census show that Somerville had the highest overall housing density (total housing units divided by gross land area) among communities in the metropolitan core.

Figure 2.3.8: Housing Units per Gross Land Area, 2000

	Housing Units, 2000	Land Area, Square Miles	Land Area, Acres	Units per Acre
Somerville	**32,477**	**4.1**	**2,649**	**12.3**
Cambridge	44,725	7.2	4,587	9.8
Chelsea	12,337	2.2	1,394	8.9
Boston	251,935	48.1	30,788	8.2
Malden	23,634	5.1	3,247	7.3
Everett	15,908	3.4	2,205	7.2
Arlington	19,411	5.4	3,481	5.6
Medford	22,687	8.5	5,426	4.2

Source: US Census

However, when analyzing the number of housing units occupying a community's residential land area, thereby accounting for non-residential land uses, such as open space, transportation infrastructure, and industry, 1,573 acres of residential land can be identified. This value yields a calculation of 20.7 housing units per acre of residential land, casting Somerville's ranking in a new light:

Figure 2.3.9: Housing Units Per Residential Land Area, 2000

	Housing Units, 2000	Residential Acres, 2000	Units per Residential Acre
Cambridge	44,725	1,698	26.3
Chelsea	12,337	527	23.4
Somerville	**32,477**	**1,573**	**20.7**
Boston	251,935	12,821	19.7
Everett	15,908	1,019	15.6
Malden	23,634	1,950	12.1
Medford	22,687	2,395	9.5
Arlington	19,411	2,445	7.9

Source: US Census, MassGIS

Unit Type

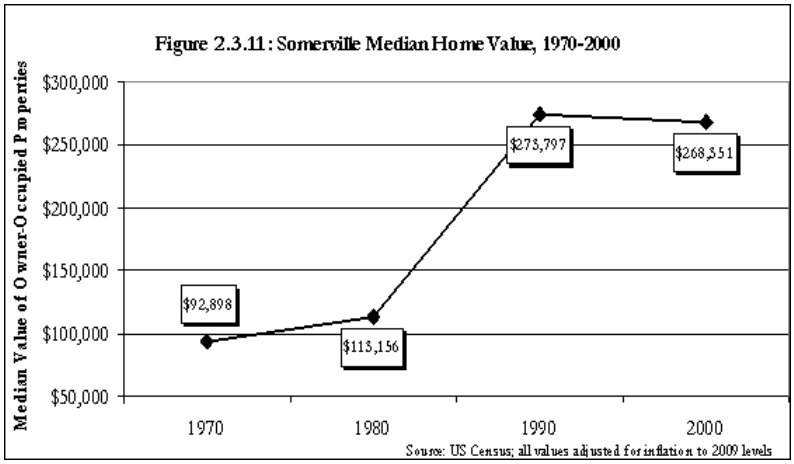
Nearly two-thirds of Somerville's housing units are located in structures with between two and four units. Over 11,000 units are located in two family structures and over 9,000 units are located in three- and four-family structures. Together, these small multifamily structures account for approximately 64% of Somerville's total housing stock. The Boston metro region contains three types residential character among urban core municipalities: those with a majority of single unit housing (Arlington, Medford), those with mostly multi-unit houses (Somerville, Everett, Chelsea) and those with a significant portion of dense residential structures containing more than 10 units (Boston, Cambridge).

Figure 2.3.10: Housing Units by Structure Type, 2000

	1 Unit	2 Units	3-4 Units	5-9 Units	10+ Units
Somerville	**12%**	**35%**	**29%**	**9%**	**16%**
Medford	38%	35%	9%	2%	16%
Everett	22%	34%	28%	4%	12%
Arlington	43%	30%	5%	3%	19%
Malden	31%	26%	13%	5%	26%
Chelsea	12%	22%	33%	15%	23%
Boston	17%	15%	26%	12%	31%
Cambridge	15%	15%	20%	12%	38%

Source: US Census

Affordability

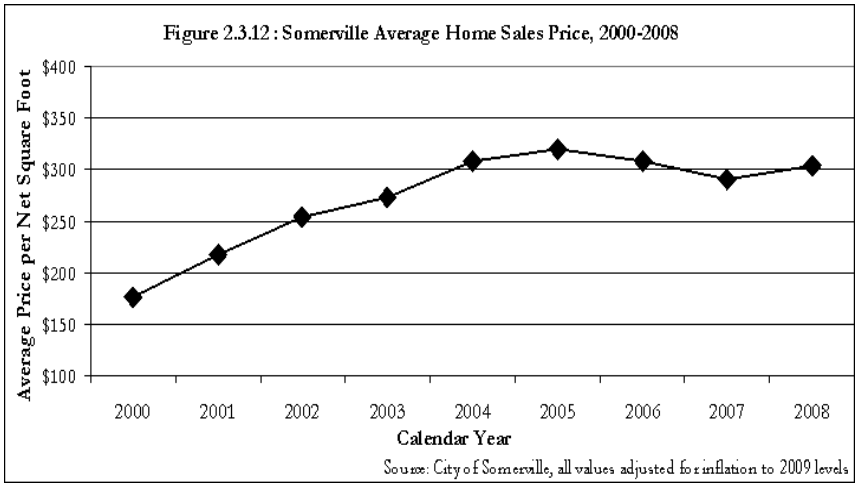


In a region recognized nationally for high housing prices, housing in Somerville has been subject to major price increases in recent decades. Somerville's inflation-adjusted median home value in 1970 was approximately $93,000 and in 1980 the median home value was reported at $113,000. However, by 1990 this increased to $274,000, a remarkable 142% increase from 1980. This sharp jump may be attributable to the timing of economic boom and bust cycles: at the time of the 1980 Census, the nation was recovering from a major recession in 1978-1979, suggesting that home values may have been particularly low. The 1990 Census, on the other hand, followed the economic expansion of the late 1980's, and as a result home values may have been particularly high at that time.

Home Sales Price data by the City of Somerville's Assessing Department can be used to complement the Census data on home values. From this source it can be seen that Somerville's home sales prices have generally reflected the post-2000 increases in assessed value.

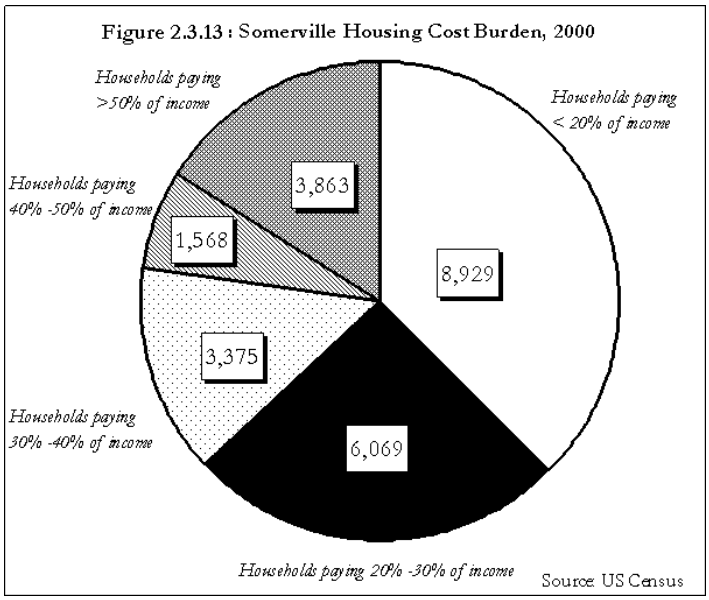
This is also reflected in sales price per square foot. According to the Assessing Department, the average sales price per net square foot in 2000 was roughly $177. This increased steadily until 2005,

when it peaked at roughly $319 per net square foot. Average sales prices seem to have moderated slightly between 2006 and 2008, although they are still significantly above prices at the beginning of the decade.



Affordability also acknowledges the owner's/renter's ability to pay. Housing literature generally suggests that households are burdened if they pay more than 30% of household income toward housing costs. Of 24,604 Somerville households for which housing cost data was recorded by the 2000 US Census, 8,806 (35.8%) reported paying more than 30% of household income toward rent or mortgage costs. There are 3,863 households (15.7%) reported paying more than 50% of income toward rent.

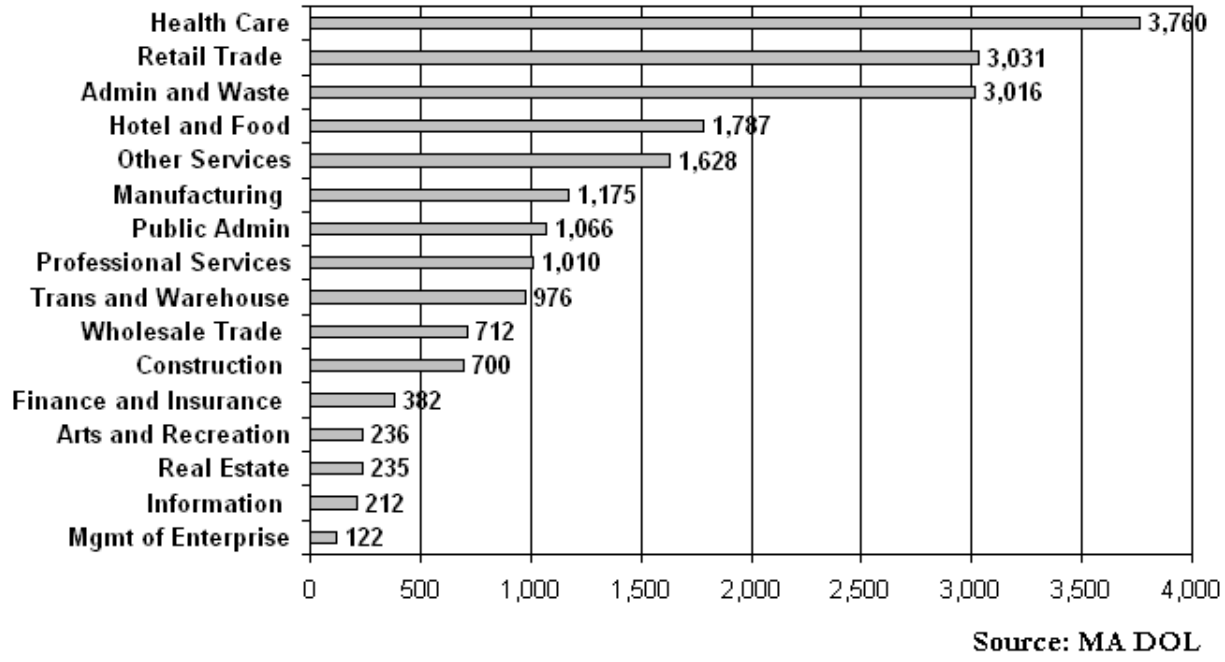
Excessive housing cost burden affects Somerville's renters more than its homeowners; of Somerville's 21,892 renter households, 8,066 (36.8%) reported paying more than 30% of household income toward rent at the time of the 2000 US Census. By comparison, among homeowners, 27.3% (740 households) reported paying more than 30% of household income toward housing costs.



Economic Trends

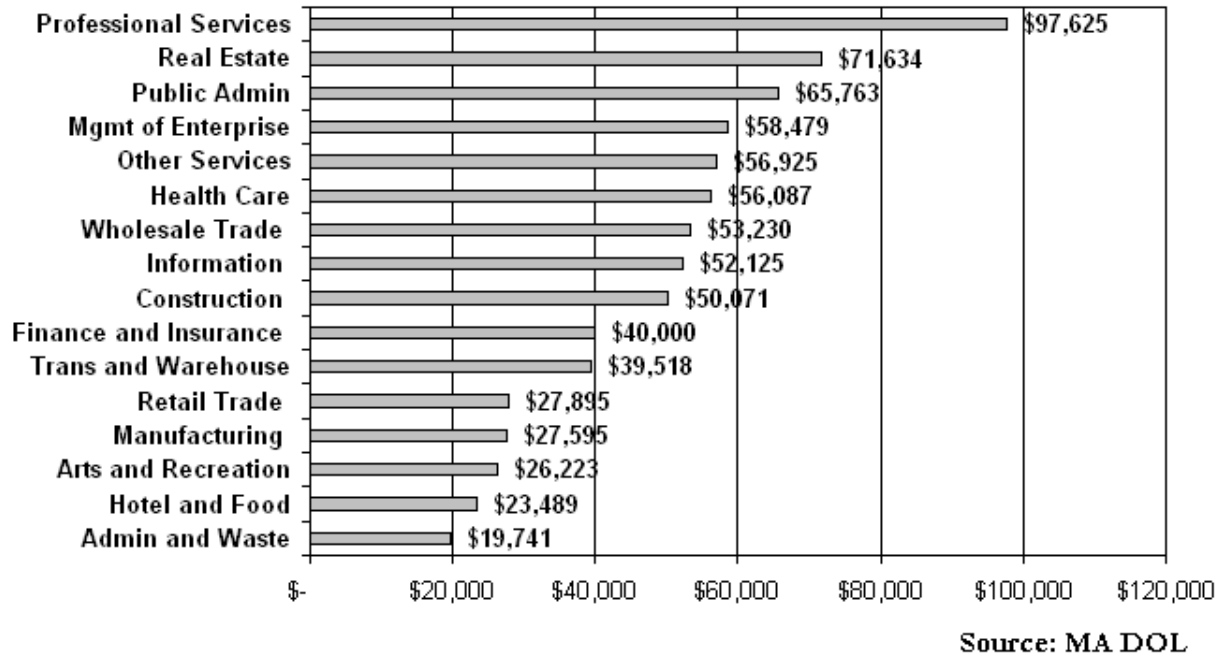
Somerville's economy has seen significant change over its history. Once a farming community, Somerville became a well recognized industrial center in the years prior to WWII. With the advent of the private automobile and the movement of manufacturing outside the urban core and U.S., the amount of economic activity and local jobs declined severely. Today, businesses in Somerville predominantly exist to support the large residential population with some other businesses taking advantage of Somerville's low rents in proximity to Boston and Cambridge's financial, health, education and technology centers. Overall, auto-focused infrastructure decisions benefitted communities outside of Somerville, at the expense of local industry and residents.

2.3.14 Somerville Employment by Industry, 2007



Source: MA DOL

2.3.15 Somerville Wages by Industry, 2007



Source: MA DOL

Employment Sectors

Health Care Services is perhaps the sole exception to the business decline seen in Somerville and in 2007, health services establishments employed 3,760 people[1]. This makes it the largest employing sector by a sizable margin over the next two largest industries. Given Somerville's small local employment base, health services sector represents a serious concentration of high value-added economic activity. Of particular importance is the average wage ($56,940) for the Health Care Services sector which is the greatest of any sector of note in Somerville. It should be noted however, that the largest employer is the non-profit Cambridge Health Alliance (CHA) which is local serving, as opposed to regional serving, and quite modest in size when compared with the medical industry in Boston. CHA operates the Somerville Hospital and a clinic in Winter Hill, but recently closed its emergency room and no longer offers detox services in the local hospital.

At 3,031 employees, the second largest sector in Somerville is *Retail Services*. The Retail Trade sector is comprised of establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are organized to sell merchandise in small quantities to the general public. Within retail services, grocery markets constitute the largest number of employees (1,039 employees), significantly dwarfing building and home materials (346 employees) and health and personal care (209 employees). This is evidence that retail in Somerville focuses on the residential neighborhoods that are proximate. The few regional serving businesses – Target, Home Depot and the Assembly Square Market Place – are very auto-oriented and locate close to high volume roadways such as I-93 or McGrath Highway. Jobs in the retail sector are typically low wage and the average wage is $26,208 per year, a wage that cannot afford the cost of living in Somerville and may be representative of the fact that many of the jobs in the retail sector are low wage, part time, and without health care benefits.

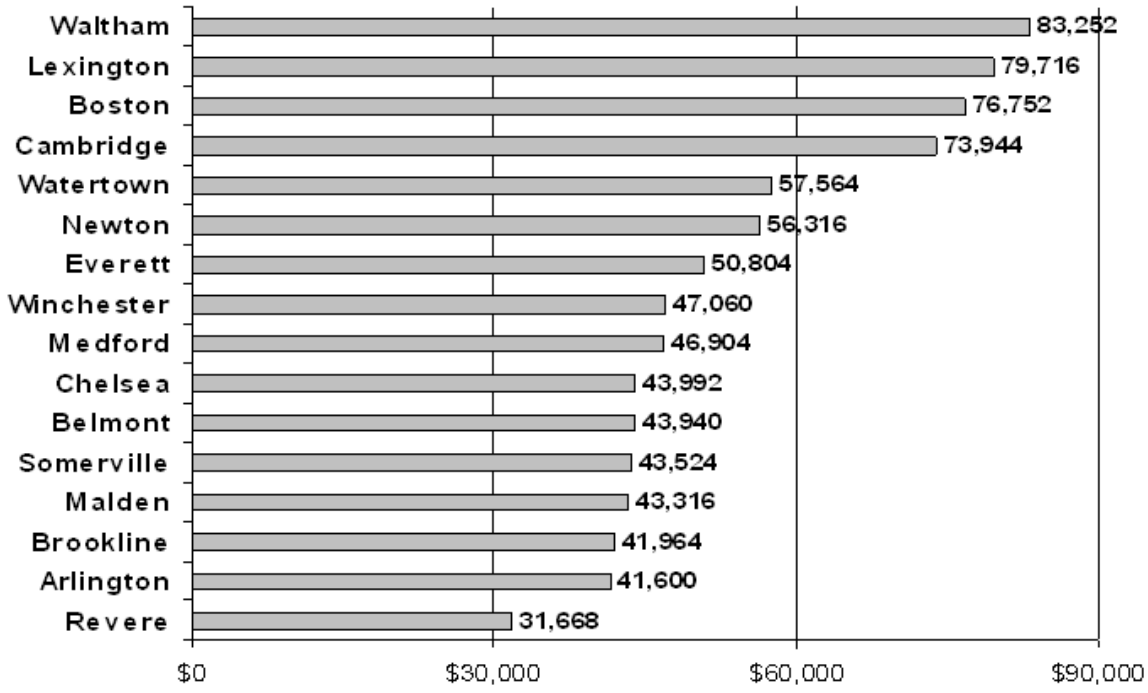
The types of firms classified as *Administrative and Waste* services likely seek out Somerville due to its proximity to Boston. Close access to large firms from other sectors (which rely on these services) and comparatively low costs of operation allow these firms to thrive. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. With 3,016 employees within Somerville, the wages in this sector are high – waste collection ($60,892), office admin ($56,108) and travel & reservations ($50,440). With nearly 2,000 jobs, the Waste Management Company is the single largest employer as it operates the trash transfer station in the Inner Belt District.

Hotel and Food Services with nearly 1,800 jobs is, in Somerville, dominated by food services. In fact, Somerville only contains two hotels – Holiday Inn (110 employees) and La Quinta (40 employees).size and type of service. However, Somerville contains a large number of vibrant restaurants that provide life to many of the city's commercial squares. Unfortunately, the wages in this sector is extremely low ($19,760 per year) and are well below a livable wage in Somerville.

[1] The Department of Labor data reports the number of people working in an industry, not the number of full time equivalents. As a result, part time workers and full time workers will be counted as equivalent in these figures.

Across all sectors, the wages paid for jobs in Somerville lag far behind many other communities in the Boston Metro Region. As can be seen below, four cities have wages of $74,000 or higher and another five have wages above $45,000. Somerville is among a group of cities and towns that have industries predominantly focused on goods and services for the local community and are not recognized regional employment centers. With the exception of Chelsea, it is likely that this circumstance is a policy choice of a community that does not seek to have significant commercial development within its borders. In contrast, Somerville wishes to expand its commercial base, but has not been well positioned to do so since rail transit was eliminated.

2.3.16 : Wages Regional Comparison, 2007



Source: MA DOL

Business Districts

Even with just over four square miles of land area, Somerville contains a number of vibrant commercial and industrial areas in addition to its residential neighborhoods. Boynton Yards, Brickbottom and Inner Belt (and previously Assembly Square) are distinct industrial areas that make up the southeastern border of the city and businesses initially located there because they are adjacent to the Fitchburg and the Lowell rail rights-of-way. Significantly, the road, rail and utility infrastructure that enabled these areas to grow in the nineteenth and twentieth centuries now inhibits their redevelopment in the twenty-first century.

In addition to these districts, several unique commercial squares are located at key junctions in Somerville's arterial road network. Union Square is located at the intersection of Prospect Street, Somerville Avenue, Summer Street and Washington Street, just north of Boynton Yards and west of Inner Belt / Brickbottom. Porter Square straddles the Somerville/ Cambridge border at the intersection of Somerville Avenue, Beacon Street and Massachusetts Avenue. Ball Square, Magoun

Square and Broadway in east Somerville (adjacent to Sullivan Square) are other key nodes of commercial activity in Somerville that are located along Broadway. Davis Square is the best known square in Somerville and is located at the intersection of Highland Avenue, Elm Street and Holland Avenue which continues on to Teele Square.

Somerville Residents in Labor Force

Despite having a very well qualified labor force among its residential population (12.6% of residents have an advanced degree), very few jobs are located in Somerville. In fact, Somerville only houses 0.49 jobs per each resident aged 16 and over in the workforce (as compared with Cambridge with 2.09 per resident in the workforce). Data indicates that the majority of Somerville residents (58%) have occupations in managerial, professional, technical, sales or administrative positions. A smaller percentage (22%) works in service occupations and even fewer (10%) as operators, fabricators, and laborers.

As a result of the limited number of jobs in Somerville and their type, less than 16% of residents work within Somerville. Nearly half travel to Boston or Cambridge for work (48% combined) with smaller percentages travelling to job centers in surrounding suburban communities. This impacts their quality of life, traffic congestion, and the amount of income spent on transportation as those working in the suburbs most likely require a private vehicle to get to work.

Figure 2.3.17 : TOP PLACES OF WORK FOR SOMERVILLE RESIDENTS, 2000

Boston	12,491	27.8%
Cambridge	9,083	20.2%
Somerville	7,092	15.8%
Medford	1,614	3.6%
Newton	1,019	2.3%
Waltham	970	2.2%
Burlington	831	1.9%
Woburn	687	1.5%
Watertown	541	1.2%
Everett	530	1.2%

Transportation Trends

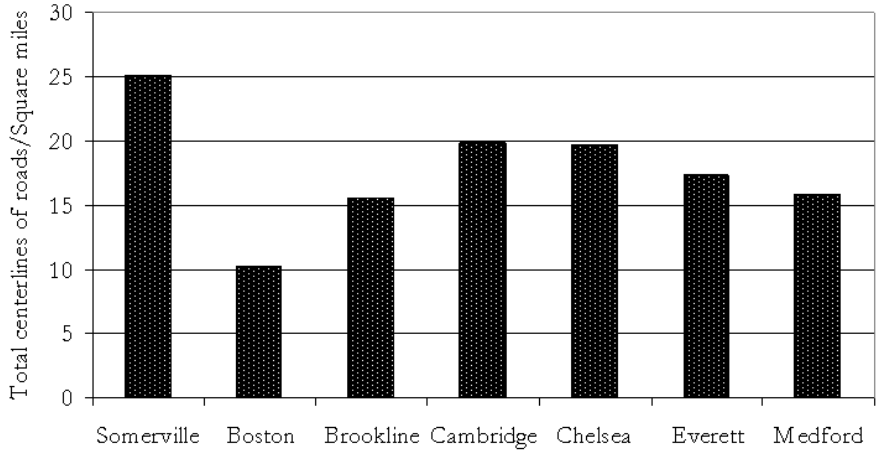
Throughout its history, Somerville has served as a vital transportation corridor, providing an important link to communities north of Boston via railroads and major roadways developed in the 19th and 20th centuries, in addition to the short-lived Middlesex Canal. The rail and trolley systems in Somerville's early years led to significant industrial and residential development in a relatively short amount of time, together with associated employment and commerce. This prosperous rail-oriented period only lasted for a period of time and by 1958, passenger rail service in Somerville was discontinued altogether. In the most-recent half century, infrastructure investment in favor of the automobile has dominated and these investments have not been kind to Somerville.

Vehicular Traffic

From 1920 to 2007, Vehicle Miles Traveled (VMT) has increased at a greater rate than the increase in road mileage throughout the United States (i.e., there are more vehicles per mile of roadway than ever before). In Massachusetts, VMT increased from 45 million to 51 million miles between the years of 1990 and 1998—an increase of 13%. This is due in part to land use patterns of dispersed growth that rely heavily on automobile transportation networks.

In this new form of suburban development, Somerville, as a locus of Interstate Highway and major arterial routes leading to employment centers in Cambridge and Boston, has shouldered an undue burden of regional through traffic. The areas of highest congestion in Somerville are Davis Square, McGrath Highway at Broadway, McGrath Highway at Washington Street, and Union Square.

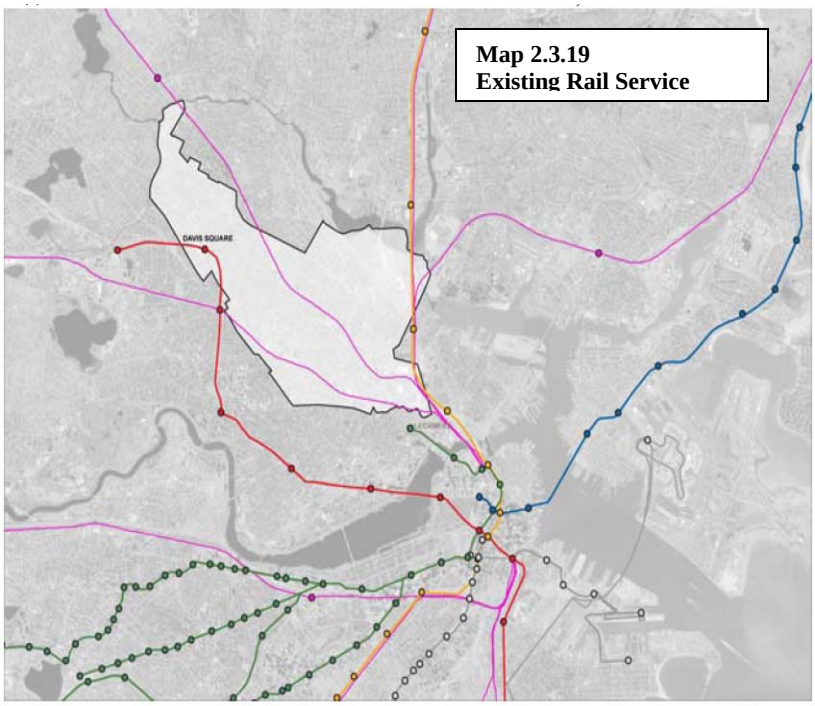
Figure 2.3.18 : Centerline of Roads / Square Mile



Source: MA EOT

Regional patterns of truck traffic have also negatively impacted Somerville. Within Somerville, trucks are allowed in areas that are designated as Urban Principal Arterials, including Washington Street, Beacon Street, Somerville Avenue, and Broadway from Route 28 to the Boston City Line. Cambridge has an abundance of 24-hour truck restrictions, as well as an evening ban on truck traffic on local roads. These restrictions push truck traffic onto Route 28 and into Somerville. Indeed, in 2001 the state's Committee on Regional Truck Issues determined that all east-west travel outside of Kendall Square should be completed in Somerville via Broadway, Somerville Avenue, and Washington Street.

The City of Somerville contains a total of 105.6 miles of paved streets, of which 88.1 miles are under local jurisdiction, 3.2 miles are under Mass Highway jurisdiction, 10.3 miles are listed as 'unaccepted', and 4.1 are under Department of Conservation and Recreation (DCR) jurisdiction, most notably, McGrath Highway. A major component of Somerville's challenge in mitigating the effects of heavy vehicular traffic and corresponding infrastructure is lack of jurisdiction over many roadways. When compared to other neighboring cities and towns, Somerville has the least



Source: City of Somerville

local control, with the exception of Medford. As a result, the City must lobby and negotiate with the respective state agencies to pay attention to local needs.

Rail Transit

With just one MBTA subway stop in its northwest corner (Red Line at Davis Square), Somerville sits within a rapid transit void. With the exception of its northwest quadrant near Davis and Porter Squares on the Cambridge/Somerville border, and the far eastern portion of Somerville near Sullivan Square, Community College and Lechmere, most of Somerville, lies beyond the service area of the MBTA rapid transit system.

Even though they pass through the city, two routes of existing commuter rail lines provide no service to Somerville. Both the Fitchburg/South Acton and Lowell MBTA Commuter Rail lines run directly through Somerville with no stops.

Built in 1985, the MBTA Red Line at Davis Square provides an important link into the system for Somerville. Overall, the Red Line makes more daily trips (427 per day), carries more riders (226,417 per week), and offers more stations and stops (22) than all subway lines in the MBTA T service (excluding surface portions of the Green Line which are considered light rail).

Bus Transit

With 15 routes functioning within and throughout the city, Somerville has a strong network of buses and nearly all neighborhoods are within a ¼ mile radius from a bus line. Most of the current bus routes follow the original paths of the old streetcar lines, with major routes running up and down Broadway, Highland Avenue and Washington Street. Though these services are fairly robust, issues with reliability, transfer waiting time and bus stop conditions, and congestion issues on the roadways, all affect the bus experience and are part of the overall impression of the bus service. Nearly 33,000 passengers board buses that pass through Somerville each day. Bus frequencies, however, are not correlated with ridership levels.

Bicyclists and Pedestrians

With an over 10-fold increase in the number of bike lanes and sharrows (arrows on streets indicating the need to share the road with bicycles), over the past two years, and the creation of the Community Path from the Cambridge city line to Cedar Street, more Somerville residents are biking for commuting purposes. Census data from 2000 shows that 2.8% of Somerville workers were commuting to work by bicycle, up from 2.0% in 1990 (see Figure 2.3.20). According to the American Community Survey, this number has increased even more to 3.5% by 2006. In 2000, more people biked to work in Somerville than in Boston (1.0%), though there were still slightly fewer bike commuters in Somerville (2.8%) than in neighboring Cambridge (3.9%). The City has installed over 4 miles of new bike lanes since 2006 for a total of 4.4 miles of bike lanes citywide and in 2010 alone, is adding 10 miles of lanes and sharrows.

Figure 2.3.20: Biking as a means of travel to work, 1990 and 2000						
City	Workers		Bicyclists		% Bike	
	1990	2000	1990	2000	1990	2000
Somerville	42,787	44,807	842	1,251	2.0%	2.8%
Boston	282,528	278,463		2,705		1.0%
Cambridge	39,946	54,969	1540	2143	3.9%	3.9%
Chelsea	11,714	12,574	75	62	0.6%	0.5%
Malden	28,068	29,119	37	89	0.1%	0.3%
Everett	17,279	17,818	8	14	0.0%	0.1%
Revere	20,032	20,529	51	50	0.3%	0.2%
Lynn	35,262	38,360	80	72	0.2%	0.2%
Saugus	13,197	13,217	8	31	0.1%	0.2%

In 1990, Census data showed that 10.7% of Somerville workers walked to work, a figure that fell to 9.2% in 2000. The most recent results of the American Community Survey (2007) report less than 8.4% percent of the city's workforce walks to work. While significantly more people walk to work in Somerville than in surrounding communities to the north, the city's percentage of walking commuters still lags far behind that of Cambridge (24.4%). That said, it should be recognized that the ratio of jobs in Somerville to the residents of working age is 0.49 while Cambridge has 2.09 jobs for each resident aged 16 and over in the labor force.

Infrastructure Trends

Sewer Systems

The majority of Somerville's sewer infrastructure was built between the late 1870s and the early 1900s and remains in use today. The backbone of the system in the DIF District is the "Main Drain," a 48-inch brick combined sewer and storm water drain built in 1873 that drains to the Massachusetts Water Resource Authority (MWRA) trunk line at the intersection of Poplar and Medford Streets before heading out to the Deer Island Treatment Plant. It is undersized for today's needs as was seen on July 10, 2010 when a rain storm dropped over 4 inches of water in under 1 hour leaving Union Square under water, destroying 16 police vehicles, and causing the relocation of the police department and 911 system for weeks.

The majority of Somerville is served by a combined sewer system. Combined sewers lines are problematic mostly during wet weather when large amounts of storm water overwhelm the pipelines and combine with sewer water, which leads to an overflow in the outfall pipes. For the most part, the oldest part of the City's sewer system is a combined system; the newer parts of the system (in areas such as Ten Hills and the far western section of the City) are separated sanitary and storm water systems.

In 1974, the civil engineering firm Camp Dresser and McKee, Inc. reported that the City's sewer system could not adequately manage storm flows of any great magnitude. Over the years, plans were developed and projects implemented to begin separating the combined sewer system (CS) into separate lines for sanitary waste and storm water. While significant improvements have been made, further reduction of the remaining combined sewers poses considerable technological and economic

challenges, as significant portions of the sewer system in the remaining CSO areas are low-lying and would likely require stormwater pump stations to prevent frequent flooding.

Potable Water

Somerville has had a public water supply system since 1868, when the City contracted with the Mystic Water Board of Charlestown for the laying of the Charlestown water main from Walnut Hill Reservoir through the city. In that year, about 2.5 miles of pipe were installed in Somerville and the system was expanded rapidly until the turn of the 20th century. Somerville's distribution system is now made up of approximately 120 miles of water mains ranging from 4 to 20 inches in diameter, with additional water services to be installed in Assembly Square as a part of the planned mixed-use development project.

All water in the Somerville is purchased by the City Water Department from the MWRA. The source of the MWRA water is the Quabbin Reservoir (capacity 412 billion gallons) located 65 miles west of Boston and the Wachusett Reservoir (capacity 65 billion gallons) about 35 miles west of Boston. The water is delivered through seven MWRA master meters into the distribution system, which is comprised of an elaborate network of pipes, valves, hydrants, and service lines. This system delivers water to homes, businesses, and various facilities for drinking and other uses such as fire protection.

Documented in their 1974 "Report on Improvements to the Water Distribution System," Camp Dresser and McKee, Inc. estimated that all pipes installed prior to 1950 were coal tar-coated cast iron or wrought iron, while pipe installed after 1950 was cement-lined cast iron.

Telecommunications

The Inner Belt is served by two high-capacity fiber-optic backbones that carry a range of providers and provide options to high-tech businesses. One line loops around the outside of the district and then connects to a 100-mile loop around Boston that roughly follows the path of Route 128 and Interstate-93. The second line connects East Cambridge to Somerville Avenue Central, Somerville Avenue West and Davis Square via Inner Belt and then extends to Route 16, Route 2 and then out to Route 128. Together, the two lines elevate the Inner Belt levels of access to those of Kendall Square, Waltham and Burlington. Only recently have high-tech businesses, such as server farms, begun to take advantage of the technology capacity that exists in the Inner Belt District

Private Utilities

Natural gas service in Somerville is provided by NStar, while electrical service is provided by NStar and National Grid.

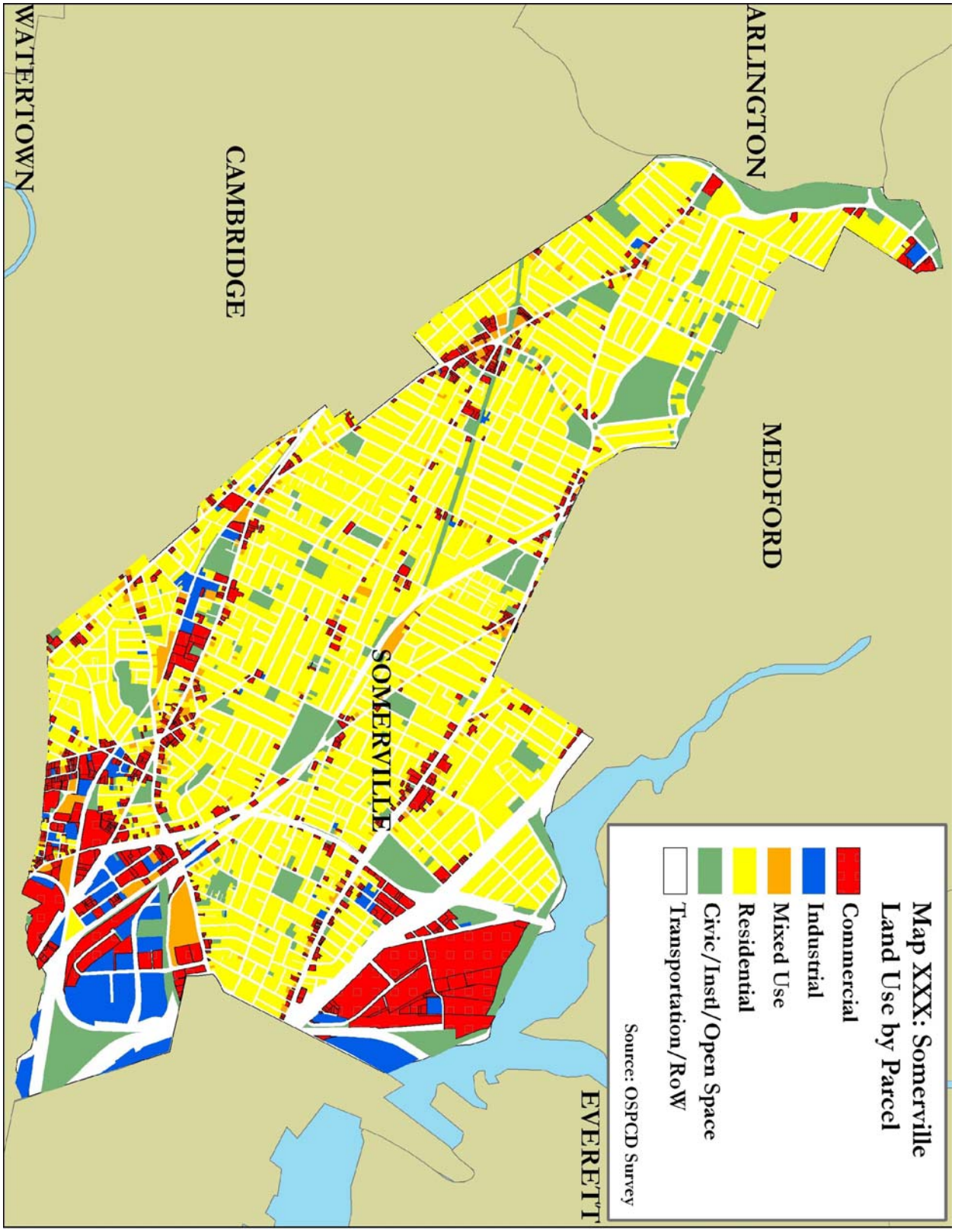
Neighborhoods like Union Square, Boynton Yards and East Somerville are notorious for electrical outages causing millions of dollars in business losses. It appears that little has been done to make the local grid more reliable. Just as important is the lack of three phase electrical power which inhabits commercial and industrial growth in some sections of the city. The one exception is Inner Belt, which is the only area of the city that has power feeds from two directions in an effort to protect it from outages as a result of the substantial telecommunications investment.

In 2009, Algonquin Gas created extended their existing J2 line to create a loop by laying a new 2.2 mile, 14 inch high pressure natural gas line from Highland Avenue and Medford Street through the Winter Hill neighborhood at out to Mystic Avenue. Additional high pressure lines exist throughout the City but little information is known about them.

Land Use Trends

From the glacier formed hills to the canals and railroads following the Mystic and Millers rivers, the physical environment has continually been the leading factor affecting land use decisions in Somerville. The pattern set during the 19th century industrial build out has been followed to this day, with commerce and industry locating in the lower elevations and along major rail lines, and residential lots on the hillsides and higher elevations.

With few exceptions, land in Somerville is used actively by the city's nearly 80,000 residents. In 2008-2009, the City undertook a detailed land use inventory to evaluate how land is used today. By far the largest land use category, comprising nearly half of land area (over 1,200 acres), is devoted to residential uses. The second highest use of land is Road Rights-Of-Way, which account for approximately 25% of Somerville's land area (650 acres). Commercial, industrial and land used for mixed use purposes collectively account for 16% of land area. Open space represents a very modest 4% of land area or 155 acres.


WATERTOWN
CAMBRIDGE
ARLINGTON
MEDFORD
SOMERVILLE
EVERETT
Map XXX: Somerville
Land Use by Parcel
Commercial
Industrial
Mixed Use
Residential
Civic/Instl/Open Space
Transportation/RoW
Source: OSPCD Survey

When evaluating the distribution of land, it is not surprising that 75% of Somerville's property tax base is from residential land and only 25% is from commercial properties. This is in direct contrast with Somerville's neighbor of Cambridge which receives 39% of property tax from commercial property. As a result, recognition exists throughout Somerville that new commercial development is needed to support critical city services, as well as to provide increased employment opportunities.

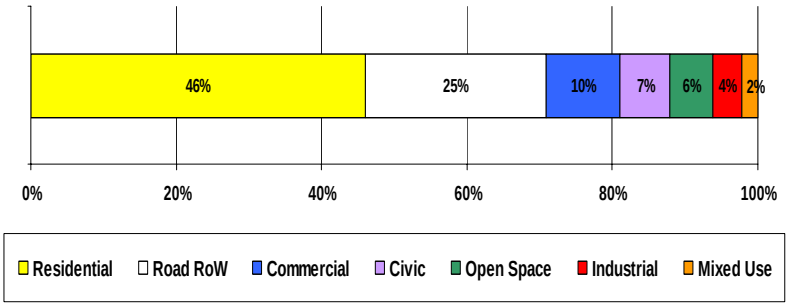


Fig. 2.3.22 Percent of Land by Use Type

While uniform metrics of density across uses are not available, the gross square footage data available from the Assessing Department shows the extent to which residential districts are more built out than commercial ones in spite of zoning that allows the opposite. With the majority of the acreage within the city boundary being occupied by low or non-tax generating uses the fiscal burden is shouldered heavily by the small number of nonresidential uses or is at the whim of State and Federal funding.

SOMERVILLE LOOKING FORWARD

Green Line Extension

The Green Line Extension represents the culmination of a decades-long effort to bring rapid transit back to Somerville. The current proposed project will extend the Green Line from its existing terminus at Lechmere station in Cambridge to a relocated Lechmere Station, with tracks running northwest through Somerville and into Medford. The main line will extend to Medford along the MBTA's Lowell Commuter Line and a spur will veer south to Union Square along the MBTA's Fitchburg Commuter Line (see Map 28). To mitigate the environmental impacts of the Big Dig, the Commonwealth is legally bound to extend the MBTA Green Line, which currently ends at Lechmere Station in East Cambridge, by 2014.

The extension includes 5 miles of additional rail service, adds seven stations to the system (including relocated Lechmere station), and is projected to increase daily ridership on the system by at least 8,600 at an estimated cost of $600 million. The City of Somerville is strongly advocating for the terminus to be located at Rt 16/Mystic Valley Parkway in Somerville, but at present, MassDOT has placed that in a future phase. In addition, the City has requested that tracks be laid in a manner to support a future station at the Medford Street overpass adjacent to Boynton Yards.

Extending the Green Line through Somerville will fill the current transit void that currently exists in most of central and eastern Somerville between the MBTA Red and Orange Lines. Additional benefits of the extension include:

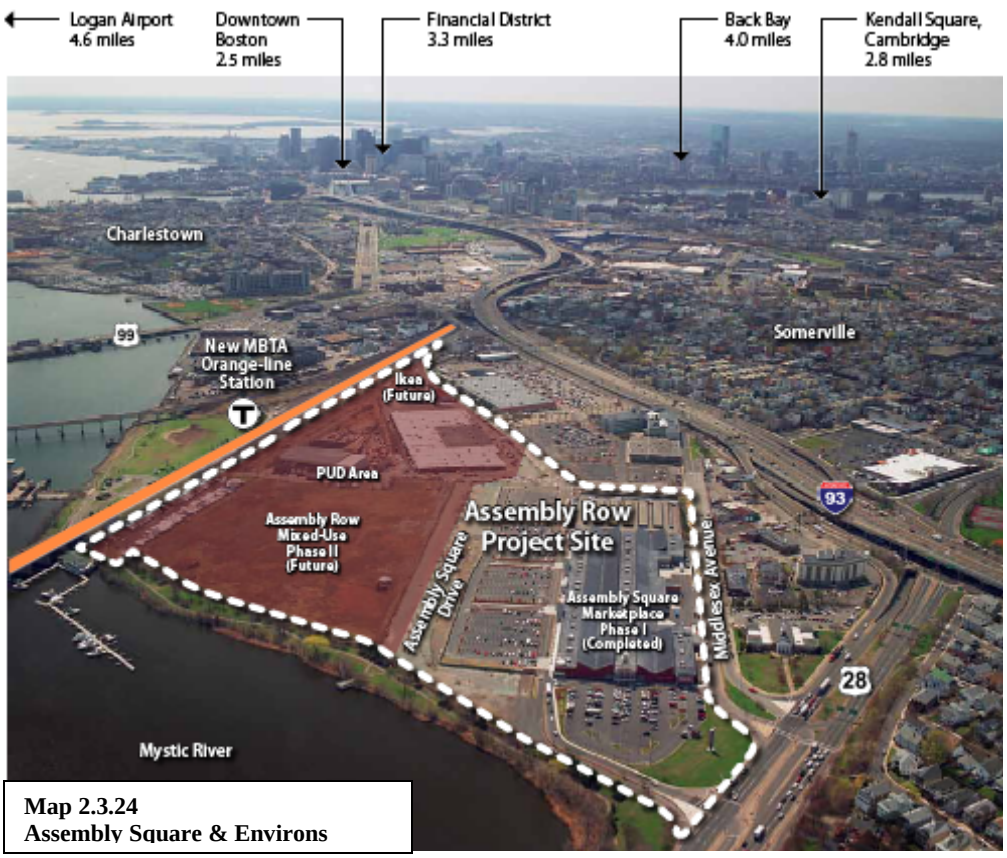
- Improved regional air quality in a corridor with a high concentration of Environmental Justice communities;
- Increased economic development and job opportunities through improved transportation access;
- Improvement over historic transportation inequities;
- Support for smart-growth initiatives and sustainable development;
- Reduction of automobile congestion along the I-93, Route 38, Route 28, and Route 26 corridors.

As noted earlier, completion of the Green Line Station and the Orange Line Station at Assembly Square will increase the number of households within ½ mile of transit from 15% to 85%.

Assembly Square

In 1980, the City of Somerville declared the Assembly Square District to be blighted, substandard, and decadent and adopted a 20-year urban renewal plan. The cornerstone of the urban renewal plan was the rehabilitation of the former auto assembly plant into a retail mall known as the "Assembly Square Mall". Other development included a new Home Depot. In 1999, the internationally known

Swedish home furnishings store, IKEA, purchased two former industrial sites on the Mystic River waterfront. IKEA obtained permits for its proposed retail store; however, the permits were challenged in court by community members opposed to a "big box" use on the waterfront, with the result that redevelopment of the site was stalled for a number of years.



Map 2.3.24
Assembly Square & Environs

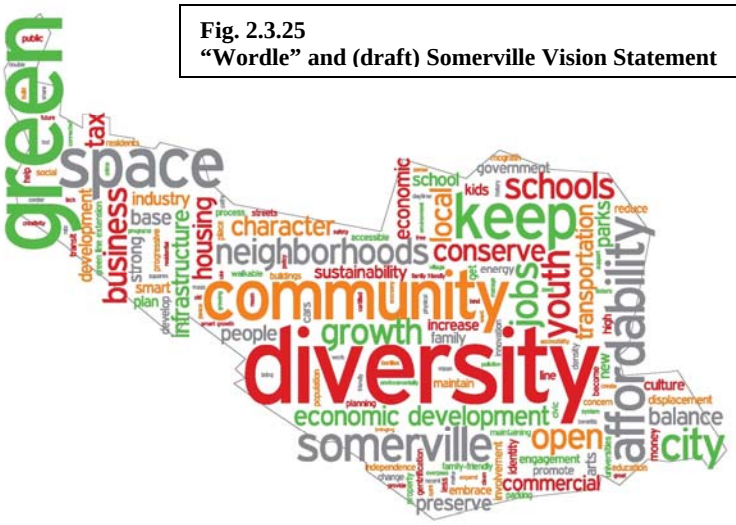
In 2005, Federal Realty Investment Trust (FRIT), the oldest real estate investment trust in the United States with over $4 billion in assets, purchased the Assembly Square Mall along with other properties in Assembly Square. FRIT redeveloped the existing mall into the Assembly Square Marketplace which opened its doors in early 2006. Later in 2006, Mayor Curtatone aided in bringing FRIT and IKEA together to come up with a feasible redevelopment plan consistent with the new vision. FRIT and IKEA agreed to trade parcels, moving IKEA inland from its initial site and leaving the waterfront open for FRIT to create pedestrian friendly, mixed-use development. As part of the approved redevelopment Assembly Square Master Plan on the Mystic River massive redevelopment project, an Orange Line station will be built at Assembly Square, which will be crucial for the area's planned growth as a mixed-used, transit-oriented center. This new plan was welcomed by those who had previously opposed the development, solidifying the vision of the district. In recent years, the project has received up to $15 million in ARRA funds, $2 million in Growth District Initiative grant funds from the Commonwealth, and to date is the only project approved for $50 million in I-Cubed bond financing also from the Commonwealth. In 2009, subsurface infrastructure under Assembly Square Drive was completed and in 2010 roadway construction is underway.

Vision for Somerville

In 2009, the City began preparation of a citywide comprehensive plan in order to be prepared for the transformational opportunity presented by the impending increase in transit access. A Steering Committee of approximately 60 members was appointed and has been meeting at least monthly since September 2009. In addition over 250 community members participated in a visioning process

to identify what they wanted to conserve in their community and what opportunities they saw for the future. A vision statement, goals, policies, and actions have been in preparation throughout 2010. It is hoped that the draft plan can be completed by the end of 2010/early 2011 with extensive public input and an approval process extending throughout early 2011.

Fig. 2.3.25
"Wordle" and (draft) Somerville Vision Statement



In Somerville, *We*:

Value the **diversity** of our people, cultures, housing, and economy.

Foster the unique character of our residents, neighborhoods, hills and squares, and the strength of our **community** spirit as expressed in our history, our cultural and social life, and our deep sense of civic engagement.

Invest in the growth of a resilient **economic base** that is centered around transit, generates a wide variety of job opportunities, creates an active daytime population, supports independent local businesses, and secures fiscal self-sufficiency.

Promote a dynamic urban streetscape that embraces public transportation, reduces dependence on the automobile, and is **accessible**, inviting and safe for all pedestrians, bicyclists and transit riders.

Build a **sustainable** future through strong environmental leadership, balanced transportation modes, engaging recreational and community spaces, exceptional schools and educational opportunities, improved community health, varied and affordable housing options, and effective stewardship of our natural resources.

Commit to continued **innovation** and affirm our responsibility to current and future generations in all of our endeavors: business, technology, education, arts, and government.

After the plan is complete, the City will initiate a rewrite of the Somerville Zoning Ordinance to support the vision for the future. Even before this, the Board of Aldermen has adopted new zoning for Union Square, Boynton Yards, and parts of Broadway which offers a glimpse of the future zoning. In Union Square / Boynton Yards, the BOA created and mapped four new Transit

Oriented Development Districts (TODs). These are TOD 55, 70, 100, and 135 where the numeric figure represents the allowed height within the district. All have increased the allowable Floor Area Ratio (FAR) substantially and in fact the TOD 135 will allow a FAR of 5.0 for a LEED Gold building. The TODs also significantly decreased the parking requirements in recognition of the future transit stations, thereby reducing a recognized impediment to development. The BOA also created and mapped two new Corridor Commercial Districts (CCDs) for locations well served by buses. These districts also increased the allowable FAR and reduced parking requirements, and in addition, created a payment in lieu of parking program whereby property owners with small lots could pay into a fund for creation of municipal parking instead of losing development opportunity on their properties.

Infrastructure Planning

The City presently has three major initiatives underway to evaluate and plan for future infrastructure needs. These include the Union Square Transportation & Infrastructure Study, Boynton Yards Transportation & Infrastructure Study, and area planning for the Inner Belt/Brickbottom Districts. Each of these projects is tasked with identifying optimal roadway configurations and quantifying and designing new subsurface infrastructure systems that will facilitate future transit oriented development within these districts. At present, funding is only available to take these projects to 25% design (Union Square) or concept (Boynton Yards and Inner Belt/Brickbottom)

ROLE OF DISTRICT IMPROVEMENT FINANCING (DIF)

With its emphasis on transit-expansion, energy efficiency, and sustainable development, Somerville is poised to take renewed advantage of its compact urban form. So while other cities across the nation struggle to restructure their urban fabric to support transit-oriented development, smart growth, and "greener" infrastructure, Somerville is fortunate to already be adapted for such opportunities.

The greatest impediments that remain include aged infrastructure, small parcel size and diffuse land ownership, and increasingly obsolete business mix. DIF offers an important funding mechanism to complete the necessary infrastructure studies, prepare construction drawings, and contribute to construction costs. The City intends to leverage DIF funds wherever possible and will seek grant or other funding at every opportunity. This is particularly important given the fact that the areas within the proposed DIF boundaries will not likely be eligible for I-Cubed funding – the diverse parcel ownership makes the likelihood of a master developer consolidating land sufficient to apply for I-Cubed extremely slim.

Section 2.4 Municipal Certification

A copy of the Municipal certification affirming that all of the DIF districts within the Municipality do not together comprise more than 25% of the total area of the Municipality along with a map showing all existing and proposed districts and their percent of the area of the Municipality.

A copy of the Municipal Certification can be found at Appendix 1.

Section 2.5 Consultants' Reports

Union Square NRSA Plan 2008-2013, Somerville Office of Strategic Planning and Community Development
East Somerville NRSA Plan 2008-2013, Somerville Office of Strategic Planning and Community Development
Union Square Master Plan, BPG Bluestone, 2003
Union Square Draft Technical Memorandum, Howard-Stein/Hudson, 2008
Union Square Functional Design Report, Howard-Stein/Hudson, 2010 (To be completed shortly)
Somerville Sewer Assessment Report, Camp Dresser McKee, 2009
Inner Belt Park Access Alternatives Study, Vollmer, 2005
Inner Belt Brickbottom Scoping Study, CBT Greenburg, 2008
North Point Somerville Study, ICON, 2003

Section 2.6 Other Useful Information