SCOPE OF WORK

Recommend the strategies, interventions, and processes for UMass and Amherst to collaborate and create a stable balance in housing and economic growth that allows both the University and Town to prosper.
2010 Population:
37,819 Residents

Source: Census 2010

AGE DISTRIBUTION

Amherst Residential Population

- Under 18
- 18-24
- 25-44
- 45-65
- 65+

34% decrease 1990-2010
22% increase 2000-2010

Source: Census 2010
5,150 Residential Parcels
46% Owner Occupied
54% Renter Occupied
9,711 Housing Units

Residential Property Types

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2010</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Housing Units</td>
<td>9,427</td>
<td>9,711</td>
<td>3.0%</td>
</tr>
<tr>
<td>Occupied Units</td>
<td>9,074</td>
<td>9,259</td>
<td>0.9%</td>
</tr>
<tr>
<td>Owner Occupied Units</td>
<td>4,131</td>
<td>4,258</td>
<td>3.1%</td>
</tr>
<tr>
<td>Renter Occupied</td>
<td>5,043</td>
<td>5,001</td>
<td>-0.8%</td>
</tr>
<tr>
<td>Vacant Units</td>
<td>253</td>
<td>452</td>
<td>78.7%</td>
</tr>
</tbody>
</table>

Owner Occupied Housing

<table>
<thead>
<tr>
<th></th>
<th>Amherst</th>
<th>Tier 1 Towns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Value (2010)</td>
<td>$340,000</td>
<td>$273,130</td>
</tr>
<tr>
<td>Median Value Increase (2000-2010)</td>
<td>93.40%</td>
<td>38.80%</td>
</tr>
<tr>
<td>% increase of owner households</td>
<td>3.10%</td>
<td>7.50%</td>
</tr>
</tbody>
</table>

Housing in Amherst is expensive relative to surrounding towns and getting more exclusive as housing supply does not keep pace with local demand.
HOUSING - RENTER OCCUPIED

<table>
<thead>
<tr>
<th>Renter Occupied Housing</th>
<th>Amherst</th>
<th>Tier 1 Towns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Gross Rent (2010)</td>
<td>$1,078</td>
<td>$872</td>
</tr>
<tr>
<td>% of renter households less than 25 years old (2010)</td>
<td>39%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Rental demand is creating pressure on for-sale housing market.

![Graph showing Amherst Renter Unit Counts by Building Type]

Source: Census 2010, RKG Amherst Housing Study

EMPLOYERS

Top Employers in Hampshire County

<table>
<thead>
<tr>
<th>EMPLOYERS</th>
<th>EMPLOYEES</th>
<th>TYPE</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Massachusetts</td>
<td>6,397</td>
<td>Higher Ed</td>
<td>Amherst</td>
</tr>
<tr>
<td>Cooley Dickinson Hospital</td>
<td>1,705</td>
<td>Medical</td>
<td>Northampton</td>
</tr>
<tr>
<td>Smith College</td>
<td>1,350</td>
<td>Higher Ed</td>
<td>Northampton</td>
</tr>
<tr>
<td>C&amp;S Wholesale Grocers</td>
<td></td>
<td>Food Distribution</td>
<td>Hatfield</td>
</tr>
<tr>
<td>ServiceNet</td>
<td></td>
<td>Human Services</td>
<td>Northampton</td>
</tr>
<tr>
<td>Mount Holyoke College</td>
<td>965</td>
<td>Higher Ed</td>
<td>South Hadley</td>
</tr>
<tr>
<td>Amherst College</td>
<td>870</td>
<td>Higher Ed</td>
<td>Amherst</td>
</tr>
<tr>
<td>US Veterans Medical Center</td>
<td></td>
<td>Medical</td>
<td>Northampton</td>
</tr>
<tr>
<td>Hampshire College</td>
<td>430</td>
<td>Higher Ed</td>
<td>Amherst</td>
</tr>
</tbody>
</table>

1 out of every 5 jobs in the County is in educational services
Over 50% of employment from top employers is in Amherst

Source: Hampshire County Regional Agenda, U3 Advisors
## EMPLOYERS

### Distribution of Employment in Amherst

<table>
<thead>
<tr>
<th>Industries</th>
<th>Town of Amherst</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employment</td>
<td>15,207</td>
<td>100%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>8,725</td>
<td>57.4%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>1,256</td>
<td>8.3%</td>
</tr>
<tr>
<td>Healthcare and Social Assistance</td>
<td>1,024</td>
<td>6.7%</td>
</tr>
<tr>
<td>Other Services, Ex. Public Admin</td>
<td>973</td>
<td>6.4%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>868</td>
<td>5.7%</td>
</tr>
<tr>
<td>Arts, Entertainment, Recreation</td>
<td>506</td>
<td>3.3%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>362</td>
<td>2.4%</td>
</tr>
<tr>
<td>Professional &amp; Technical Service</td>
<td>304</td>
<td>2.0%</td>
</tr>
<tr>
<td>Real Estate &amp; Rental and Leasing</td>
<td>225</td>
<td>1.5%</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>206</td>
<td>1.4%</td>
</tr>
<tr>
<td>Information</td>
<td>191</td>
<td>1.3%</td>
</tr>
<tr>
<td>Construction</td>
<td>143</td>
<td>0.9%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>117</td>
<td>0.8%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>101</td>
<td>0.7%</td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td>96</td>
<td>0.7%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing &amp; Hunting</td>
<td>51</td>
<td>0.3%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>38</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Within Amherst, 60% of jobs are in Educational Services

Tourism is also an important local economic driver

Source: ESRI Business Analyst, Census
ANCHOR INSTITUTIONS

Centers of **employment**

Destination for **students**

Purchasers of **goods and services**

National centers of **research**

Curator and generator of **arts and culture**

Drivers of **economic development**

---

**UMASS**

**24,961 Students**

**6,397 Employees**

**$1 Billion** operating budget
24,961 Students
Fall 2013

<table>
<thead>
<tr>
<th></th>
<th>Full Time</th>
<th>Part Time</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate (including Stockbridge)</td>
<td>20,280</td>
<td>448</td>
<td>20,728</td>
</tr>
<tr>
<td>Graduate</td>
<td>2,090</td>
<td>2,143</td>
<td>4,233</td>
</tr>
<tr>
<td>Total Taking Classes at UMass</td>
<td>22,370</td>
<td>2,591</td>
<td>24,961</td>
</tr>
<tr>
<td>Continuing and Prof. Education (on-line)</td>
<td>438</td>
<td>3,119</td>
<td>3,557</td>
</tr>
</tbody>
</table>

24,961 Students
14,300 Beds
97% Occupancy

4,000 Estimated UMass Students living off-campus in Amherst
EMPLOYEES

<table>
<thead>
<tr>
<th>Town</th>
<th>Total</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amherst</td>
<td>1,567</td>
<td>24.5%</td>
</tr>
<tr>
<td>Belchertown</td>
<td>417</td>
<td>6.5%</td>
</tr>
<tr>
<td>Northampton</td>
<td>402</td>
<td>6.3%</td>
</tr>
<tr>
<td>Hadley</td>
<td>334</td>
<td>5.2%</td>
</tr>
<tr>
<td>Sunderland</td>
<td>224</td>
<td>3.5%</td>
</tr>
<tr>
<td>Greenfield</td>
<td>222</td>
<td>3.5%</td>
</tr>
<tr>
<td>Easthampton</td>
<td>172</td>
<td>2.7%</td>
</tr>
<tr>
<td>Florence</td>
<td>168</td>
<td>2.6%</td>
</tr>
<tr>
<td>Holyoke</td>
<td>136</td>
<td>2.1%</td>
</tr>
<tr>
<td>Leverett</td>
<td>125</td>
<td>2.0%</td>
</tr>
<tr>
<td>Springfield</td>
<td>120</td>
<td>1.9%</td>
</tr>
<tr>
<td>South Hadley</td>
<td>118</td>
<td>1.8%</td>
</tr>
<tr>
<td>Ware</td>
<td>114</td>
<td>1.8%</td>
</tr>
<tr>
<td>Chicopee</td>
<td>113</td>
<td>1.8%</td>
</tr>
<tr>
<td>Shutesbury</td>
<td>94</td>
<td>1.5%</td>
</tr>
<tr>
<td>Montague</td>
<td>90</td>
<td>1.4%</td>
</tr>
<tr>
<td>South Deerfield</td>
<td>88</td>
<td>1.4%</td>
</tr>
<tr>
<td>Granby</td>
<td>78</td>
<td>1.2%</td>
</tr>
<tr>
<td>Pelham</td>
<td>75</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

SOURCE: UMASS, U3 ADVISORS

EMPLOYEES

6,397 Employees
86% full time

24% in Amherst
45% of UMass Faculty

SOURCE: UMASS, U3 ADVISORS
UMASS SHARE OF AMHERST RESIDENTIAL POPULATION

- UMass Employees
- UMass On Campus Students
- Estimated UMass Off-Campus Students
- Amherst Residents unaffiliated with UMass

Approximately 50% of Amherst residents are UMass students, faculty, or staff

STUDENT LIFE

UMass has 400 student organizations with 11,000 total members, but lacks modern gathering, events, and performance space

- Academic buildings filling the void
- Student Life planning process underway

Challenge in providing on-campus social events for students, particularly underage students

Lack of options, social media attracts students off campus into unsupervised environments
DINING SERVICES

Award winning dining services
- 7 dining commons and 23 retail locations
- 83% undergraduate enrollment
- 2nd largest university dining program in the country

SOURCE: umassdining.com, Boston Globe

RESEARCH AND COMMERCIALIZATION

$194 million in research expenditures

Highlights and initiatives:
- Institute of Applied Life Sciences $100 million grant, with emphasis on translational research
- Industry collaborations with UMass Innovation Institute
- UMass Center for Entrepreneurship
- UMass Innovation Challenge
- 24 patents and 21 license and options agreements issued in FY 2013
- 3rd Statewide in NSF Funding

SOURCE: UMASS
**RESEARCH AND COMMERCIALIZATION**

**Challenges** in leveraging UMass research and commercial potential locally:

**UMass**
- Distribution of disciplines across the State (i.e. no medical school)
- Only starting to scale translational research

**Amherst**
- Lack of organization and community amongst local start-up businesses
- Amherst’s location relative to major investment markets
- Lack of space

**ECONOMIC IMPACT**

UMass Amherst generated **$1.9 billion** in statewide economic activity in 2013

**Local drivers:**
- Students
- Employees
- Related jobs
- Purchasing
- Research

*Source: UMass Donahue Institute*
**GROWTH**

Growth from 2000-2014

- **UMass Students**: 16%
- **UMass Beds**: 20%
- **Amherst Residents**: 8%
- **Amherst Housing Units**: 3%

Source: Census, UMass, RKG Housing Study, American Community Survey, U3 Advisors

**PLANNING**

Amherst Master Plan - 2010

Key Goals from Community

- Maintain Amherst's existing community character
- Encourage vitality in the downtown and village centers
- Balance land preservation objectives with more intensive development in appropriate areas
- Provide housing that meets the needs of all residents while minimizing impacts on the environment
- Provide community services to meet the needs of all residents
- Diversify and expand the economic base
- Enhance Town/Gown relations and cooperation
- Promote an ethic of sustainable environmental and energy practices in all Town Activities

Source: Town of Amherst
PLANNING

UMass Amherst
Campus Master plan – 2012
Select Development Goals

- Support the 2010 Framework for Excellence, including increasing enrollment (3,000 students), faculty and staff (1,000) and research awards / expenditures (x2)
- Develop physical connections throughout the campus and between the host communities and region
- Develop a 24/7/12 mixed use campus core

LANDUSE

17,754 Acres
58% Protected/Institutional/Municipal (10,298 Acres)
27% Residential Landuse (4,912 Acres)
12% Commercial Landuse (2,139 Acres)
3% Vacant Residential (551 Acres)

6,159 Parcels
84% Residential Parcels
Average Parcel Size: 1.62 Acres
Average Value: $246,267
12% Protected/Institutional/Municipal
Average Parcel Size: 11 Acres
Average Value: $490,321
2.5% Commercial - Other
Average Parcel Size: 0.96 Acres
Average Value: $430,798
1.5% Commercial Parcels - Retail & Services
< 1% Industrial/Storage/Quarry
1% Village Centers
The Amherst Zoning Bylaw has six (6) residential zoning districts and one (1) overlay district including:

- Fraternity Residence
- General Residence
- Low Density Residence
- Neighborhood Residence
- Outlying Residence
- Village Center Residence

There are also six (6) business districts, four (4) where residential uses are allowed that include the following:

- Village Center Business
- Commercial
- General Business
- Limited Business
- Neighborhood Business
- Office Park
- Professional Research Park
- Light Industrial
- Educational
- Flood Prone Conservancy

Zoning that allows for Mixed Use Development

- Village Center Business
- Commercial
- General Business
- Limited Business
- Neighborhood Business
VILLAGE CENTERS

1. Amherst Center
2. East Amherst
3. North Amherst
4. Gatehouse Village
5. Pomeroy
6. Cushman Village
7. South Village
8. Atkins Corner Village

BUSINESSES

1,031 Businesses

<table>
<thead>
<tr>
<th>Category</th>
<th># of Businesses</th>
<th>% of Businesses</th>
<th>Estimated Sales Volume</th>
<th>% of Estimated Sales Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating and Drinking</td>
<td>80</td>
<td>8%</td>
<td>71,654</td>
<td>6%</td>
</tr>
<tr>
<td>Retail</td>
<td>86</td>
<td>8%</td>
<td>153,076</td>
<td>13%</td>
</tr>
<tr>
<td>Arts, Entertainment, and Rec</td>
<td>39</td>
<td>4%</td>
<td>65,330</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>826</td>
<td>80%</td>
<td>870,569</td>
<td>75%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>1,031</td>
<td>100%</td>
<td>1,160,629</td>
<td>100%</td>
</tr>
</tbody>
</table>

SOURCE: TOWN OF AMHERST, U3 ADVISORS

SOURCE: ESRI BUSINESS ANALYST, U3 ADVISORS
APPROVED DEVELOPMENT

469 beds approved for construction

<table>
<thead>
<tr>
<th># of Units</th>
<th># of Beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Trolley Barn</td>
<td>4 16</td>
</tr>
<tr>
<td>2. Olympia Place</td>
<td>75 236</td>
</tr>
<tr>
<td>3. Kendrick Place</td>
<td>36 102</td>
</tr>
<tr>
<td>4. Amherst Office Park II</td>
<td>17 19</td>
</tr>
<tr>
<td>5. Presidential Apartments</td>
<td>52 96</td>
</tr>
<tr>
<td>Total</td>
<td>184 469</td>
</tr>
</tbody>
</table>

SOURCE: TOWN OF AMHERST, U3 ADVISORS

SUMMARY: ANALYSIS

- Amherst's economic and residential growth is driven by UMass
- Local housing supply is not keeping pace with demand, including student demand
- Both economic opportunity and lack of housing is contributing to the decline in the young workforce
- Development constraints (available land, zoning, approval process) are contributing to the imbalance between UMass and Amherst
SUMMARY: OBSERVATIONS

UMass and Amherst have physically disconnected and disengaged over time

Lack of forums encouraging collaboration between UMass and Amherst

(although the Amherst Business Improvement District is one)
SUMMARY: OBSERVATIONS

Many levels of positive interrelationships between UMass and Amherst

PRELIMINARY RECOMMENDATIONS
OBJECTIVES

UMass Amherst

High quality housing for as many students as possible

24/7/12 Campus environment

Professional, research, entrepreneurial opportunities outside the classroom

A downtown that welcomes students

OBJECTIVES

Town of Amherst

Vibrant downtown and strong village centers

Diverse and affordable housing supply

Preserved character, neighborhoods, and open space

Local employment opportunities and increased tax base
OBJECTIVES

Potential for partnership

- High quality housing for as many students as possible
- 24/7/12 Campus environment
  - Professional, research, entrepreneurial opportunities outside the classroom
  - A downtown that welcomes students

- Vibrant downtown and strong village centers
- Diverse and affordable housing supply
- Preserved character, neighborhoods, and open space
- Local employment opportunities and increased tax base

PRELIMINARY RECOMMENDATIONS

- Mixed use development with housing for students and retail
- Foster local start-up and entrepreneurial community
- Shared approach towards future development
PRELIMINARY RECOMMENDATIONS

Mixed use development with housing for students and retail

Proposed locations:
• That are in close proximity to UMass (particularly for students)
• That are in close proximity to village centers
• Where land control is feasible
• Where compact development is appropriate
COMMUNITY FEEDBACK

Received feedback for August 4th TGSC meeting via emails and letters

- Housing:
  - Concern for student impact on nearby neighborhoods
  - Tension between wanting to remove unruly student behavior and connect energy to Downtown
  - Importance of housing affordability

- Economic development
  - Desire for tax revenue
  - Need for a year round population
  - Desire for more dining options
  - Need for entrepreneurial space

STUDENT FEEDBACK

- Little incentive to utilize Downtown
  - Pre-paid, excellent dining options on campus
  - Doesn’t have the same appeal as a Northampton or larger Downtown
  - Proximity is an issue
  - Recommended special events as an excellent way to attract more student activity

- Would welcome higher quality housing, but affordability is an issue
  - Belief that off-campus housing is more affordable than on-campus housing
  - Student group homes will always be desirable

- Desire by Greek Life to use a housing cluster as a means of legitimizing their organizations
  - Can create a new social hub for the University, compliant with University regulations, away from neighborhoods
  - May address some of the off-campus party conflicts
FINAL RECOMMENDATIONS
SITE & PROGRAM

WHERE IS THE OVERLAP

Walking Zones
Intersection of Zones

Campus Core
0.5 Mile Buffer
0.75 Mile Buffer
FOCUS AREA

- Within close proximity of campus core and village center / downtown
- On UMass owned land
- Undeveloped / underdeveloped sites
- Appropriate for a mix of housing
MASS AVE

Ownership
- Owned by Individuals
- Owned by Entities
- Parking Lots
- UMass Property
- Buildings

MASS AVE ALTERNATIVE 1

- Mixed Use with graduate and upper-classman housing
- Active first floor with blend of start-up / research space and retail
- Mass Ave. as “Main Street” with dynamic small scale uses guide students coming from campus south along North Pleasant Street
MASS AVE
ALTERNATIVE 2

- Mixed Use with graduate and upper-classman housing
- Active first floor with blend of start-up / research space and retail
- “Main Street” south of Mass Ave. with dynamic small scale uses guide students coming from campus south along North Pleasant Street
- Neighborhood grid complete and made “public” to eliminate dead end streets

FOCUS AREA

UNIVERSITY DRIVE
STUDENT VILLAGE
- Undergraduate "student village" with student housing and some academic / flex research space
- University Drive activated with active ground floor uses including retail
NORTH PLEASANT CORRIDOR

- Infill housing at the Gateway site with active uses on North Pleasant for faculty and staff, residents, and students
- Mixed use commercial, retail, housing, office space, co-working space on commercial site at Kendrick Park
- Consistent with Gateway Plan and Kendrick Place / Carriage Shops development

FOCUS AREA
NORTH AMHERST

- Redevelopment of North Village Apartments for graduate / family housing
- Cluster housing replaced by a street
- System with a primary "front door" street anchored on west and east ends by recreational amenities.
- Street grid connected north and south to adjacent development
FOCUS AREA

- Site of student housing project, new affordable housing, and underutilized UMass land and buildings
- Previously envisioned as a fraternity cluster
- Away from Downtown, Village Centers

SITE EVALUATION

- Lessened connectivity to Amherst
- Away from traditional neighborhoods
SITE EVALUATION

- More prominent sites
- Potential bridge to Downtown

SITE EVALUATION - BEST PRACTICES IN MIXED-USE DEVELOPMENT
SITE EVALUATION - BEST PRACTICES IN MIXED-USE DEVELOPMENT

Delmar Loop, Washington University in St. Louis

University of Rochester
## SITE EVALUATION - BEST PRACTICES IN MIXED-USE DEVELOPMENT

### Arts & Culture

### SITE EVALUATION

<table>
<thead>
<tr>
<th></th>
<th>Mass Ave</th>
<th>University Drive</th>
<th>N. Pleasant</th>
<th>N. Amherst</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ideal Market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduate</td>
<td></td>
<td>Graduate</td>
<td>Faculty &amp; Staff</td>
<td>Faculty &amp; Staff</td>
</tr>
<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
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<td>Undergraduate</td>
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<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graduate</td>
<td></td>
<td>Graduate</td>
<td>Faculty &amp; Staff</td>
<td>Faculty &amp; Staff</td>
</tr>
<tr>
<td>Undergraduate</td>
<td></td>
<td>Undergraduate</td>
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- **Downtown / Village Center Connectivity**
  - Moderate
  - Low
  - High
  - High / Village Center

- **Campus Core Connectivity**
  - High
  - Moderate
  - Moderate
  - Low

- **Site conducive to development**
  - Large footprints of surface parking
  - Large footprints but need to understand site suitability
  - Requires an assemblage / infill strategy but feasible
  - Requires significant demolition but quite feasible

- **Proximity to non-student neighbors**
  - Relatively close
  - Relatively far
  - Relatively close
  - Relatively far
While all of the sites were identified due to their feasibility, we recommend MASS AVE & N. PLEASANT STREET as the sites with the most significant potential for impact:

- Can serve as a bridge between campus and downtown
- Housing can be developed to accommodate multiple market types
- Tremendous opportunity to connect to nearby academic and research uses
- Can be developed contiguously in phases
- Identified on UMass Master Plan as a mixed-use opportunity
- Builds on recent private and public investment
FINAL RECOMMENDATIONS
DEVELOPMENT MECHANISMS

DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)
RANGE OF PRODUCTS

Appears part of campus
Predominantly single use
University managed
Cost controlled

Activates campus edge
Mixed-use
3rd party managed
Market rate

South Campus Commons, U of Maryland
Radian, U of Pennsylvania
DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)  
ADDRESSING RISK

For both the University and Developer, P3’s have inherent risk. This can be mitigated, but specific risks need to be identified early on.

<table>
<thead>
<tr>
<th>University Risk</th>
<th>Potential Intervention</th>
</tr>
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</table>
| Credit Impact   | • Make product non-core (market-rate, edge location, 3rd party managed)  
|                 | • No participation in financing  
|                 | • No participation in leasing  
|                 | • Land unsubordinated to project |
| Control         | • Institute project covenants and performance metrics  
|                 | • Manage housing |

<table>
<thead>
<tr>
<th>Developer Risk</th>
<th>Potential Intervention</th>
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</thead>
</table>
| Project Cost   | • Higher rental rate  
|                 | • University funded site or infrastructure investments  
|                 | • Discount on land  
|                 | • University credit enhancement  
|                 | • University equity investment |
| Leasing        | • Master lease  
|                 | • Marketing  
|                 | • Agreement regarding adding future supply |
DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3) CHALLENGES SPECIFIC TO UMASS

P3’s for UMass student housing are untested, and have legal, political, and operational hurdles

- Precedent for litigation related to privately developed student housing for public university students
- Can require a high standard of labor compliance
- Requires Board of Trustees approval
- Needs to address cost, student code of conduct, campus housing standards
- Desire by Town of Amherst to capture property tax revenue

DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3) CONCLUSIONS

- P3’s may be a viable option to increase housing supply, but will not be determined until there is a concerted effort to engage political leadership, legal council, and private sector
- Development structure will be a combination of University priorities, developer return requirements, market assessment, and political approvals and support
- Site and program will help determine target market, campus / community spectrum, and political support at local and State levels
**APPLICABLE LAND USE TOOLS**

<table>
<thead>
<tr>
<th>OPTIONS</th>
<th>INTENDED OUTCOMES</th>
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<tbody>
<tr>
<td>INCLUSIONARY / INCENTIVE ZONE</td>
<td>Affordable housing created on- and off-site</td>
</tr>
<tr>
<td>OVERLAY DISTRICT</td>
<td>Infill and aggregated development</td>
</tr>
<tr>
<td>MIXED USE DISTRICT</td>
<td>Improve options and amenities</td>
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<tr>
<td>SPECIAL USE DISTRICT</td>
<td>Added units, e.g. accessory apartments</td>
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<tr>
<td>C.40R AND C.40B</td>
<td>Creation of controlled affordable units</td>
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<tr>
<td>PERFORMANCE STANDARDS</td>
<td>Mitigation for bonuses</td>
</tr>
<tr>
<td>CODE ENFORCEMENT</td>
<td>Ensure safety and livability</td>
</tr>
<tr>
<td>LICENSE / REGISTRATION</td>
<td>Reliable data</td>
</tr>
<tr>
<td>DEVELOPMENT AGREEMENT</td>
<td>Predictable process and known outcomes</td>
</tr>
</tbody>
</table>

**LARGE-SCALE DEVELOPMENT DISTRICTS**

TWO-STEP PROCESS:

**MASTER PLAN**
- Approve Master Plan of Development, and,
- Agree on Design and Performance Standards

**SITE PLAN REVIEW**
- Based on Master Plan and Application of the Design and Performance Standards,
- Approve Design for Construction
LARGE-SCALE DEVELOPMENT DISTRICTS

EXAMPLES:

New Town Center, Wayland, MA

Storrs Center, Mansfield, CT

University Station, Westwood, MA

DEVELOPER’S AGREEMENT

Definition: Contract between municipality and an entity that controls property within the municipality for the purposes of real estate development

Applied outside of, or in addition to, local land use regulatory functions

Includes terms, conditions, standards and responsibilities between the parties such as, use mix, design quality, infrastructure improvements, mitigation, performance standards, phasing, town contributions, guarantees, and contingencies
DEVELOPER’S AGREEMENT

EXAMPLE:
McLean Hospital Redevelopment, Belmont, MA

RENTAL UNIT REGISTRATION

Describe the rental demographics with definitions for:

• Student

• Moderate, Low, and Very-Low Income person

Manage first by identification and then by enforcement
FINAL RECOMMENDATIONS
INNOVATION ECONOMY

AMHERST’S INNOVATION ECOSYSTEM

ELEMENTS OF AN INNOVATION ECOSYSTEM

High Value Research Activities
Creative Fields & Activities
Entrepreneurship & Start Up Activity
Advanced Manufacturing

UMASS
AMHERST
PIONEER VALLEY
STATE/BEYOND
INNOVATION ECONOMY
RECOMMENDATIONS

• Need for affordable commercial **space** for small businesses and entrepreneurs within walking distance of university and downtown

• Support **infrastructure** for entrepreneurs, inventors, start ups and innovators through cowork, maker, accelerator, incubator spaces

• Formalize the **organizational structure** in the Town and at the University to promote greater collaboration around local entrepreneurship and translation of research to market

### Innovation Districts Assets

**Economic:** Firms, institutions, and organizations that support and nurture innovation

**Physical:** Buildings, open spaces, streets, and physical infrastructure designed to support interaction and creativity

**Networking:** Relationships between individuals, firms, & institutions that advances new ideas (social and collaboration network)

*Bruce Katz, Brookings Institute*

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HYBRID SPACE

Collaborative Learning

*University of Wisconsin Institute for Discovery, Madison, WI
Stanford University Design School, Stanford, CA*
HYBRID SPACE
Informal Collaboration

HYBRID SPACE
Maker Spaces

Artisan's Asylum, Somerville, MA
Makerhaus, Seattle, WA
HYBRID SPACE
Coworking Space

Parliament Co-working, Hobart, AU
Raum Betahaus, Berlin
We Work, Boston, MA

HYBRID SPACE
Accelerators & Start Up Halls

MassChallenge, Boston, MA
Y-Combinator, Silicon Valley, CA
Cambridge Innovation Center, Cambridge, MA
INNOVATION ECONOMY
TOWN-GOWN MAKERSPACE

• Makerspace targeting students of all levels to promote independent learning and experimentation in technology and entrepreneurship
• Partnership between UMass, Town of Amherst, Amherst Media
• Targeting 2,000 square feet in the Amherst Media Building

BUILDING A NATION OF MAKERS: UNIVERSITIES AND COLLEGES PLEDGE TO EXPAND OPPORTUNITIES TO MAKE

Executive Office of the President
JUNE 2014

The University of Massachusetts Amherst is partnering with the Town of Amherst to establish a "town-gown Makerspace" that will host community and youth programs in science, technology, engineering, art, and math. Together with Amherst Media, a team of faculty will host a series of Maker workshops and in under占用 Makerspace hours.
FINAL RECOMMENDATIONS

ORGANIZATION

CONTEXT

• The Town Gown Steering Committee has created a forum to understand, debate, and collaborate on points of intersection between campus and community
• However, the future of TGSC has not been determined beyond the conclusion of the Housing and Economic Development Plan
• “Institutionalizing” organizations that focus on town/gown issues and opportunities for collaboration have been fruitful in many other college towns
ORGANIZATION
COLLEGE PARK
CITY UNIVERSITY
PARTNERSHIP

CPCUP ability to influence

Degree of importance for CPCUP goals

LOW
HIGH

Implement school strategies (pre-K to 12)
Develop housing incentive programs
Enhance safety initiatives
Implement Route 1 improvements
Create diversified housing supply strategy
Develop high-tech business attraction strategy
Create bike/pedestrian infrastructure
Develop childcare/early education options
Manage land control & assemblage
Advocate for Purple Line light rail

Create marketing & branding strategy
Support Sustainable MD Certified
Improve & maintain public space and streetscapes
Provide façade improvement grants
Create retail/local business recruitment strategy
Provide "green" standards & incentives
Target local institutional purchasing
Improve MARC/bus usage

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Organizations:
- Housing and Development
- Education
- Transportation
- Sustainability
ORGANIZATION
UNIVERSITY / TOWN OF AMHERST COLLABORATIVE

- Launch University Town of Amherst Collaborative (UTAC)
  - Next iteration of Town Gown Steering Committee
- Recommended Board Membership
  - 3 UMass administrators or faculty, appointed by the chancellor
  - 3 Town administrators appointed by the Town Manager
  - 4 student representatives
  - 2 business leaders
  - 2 resident / Town Meeting representatives
- Board Chairperson is either a University or Town administration affiliate
  - Board Chair rotates between University and town every two years

ORGANIZATION
SUB-COMMITTEES

Launch sub-committees, with co-chairs consisting of one town and one university representative, to identify key goals, initiatives, and interventions within the defined areas.

Three suggested sub-committees are:

- Housing
  - Student housing
  - Housing for faculty and staff
  - Affordable housing
- Economic Development
  - University partnerships
  - Entrepreneurship and start-ups
  - Food, retail, and amenities
- Quality of Life
  - Public Safety
  - Student behavior
ORGANIZATION
KEY COMPONENTS TO UTAC

- Structure - “virtual” or independent non-profit
- Mission and by-laws
- Dedicated funding sources
- Staff support / executive director
- Strategic plan

ORGANIZATION
OTHER RECOMMENDATIONS

Town of Amherst: Recommend hiring a Director for Economic Development
- Can play a key role in UTAC
- Requires an economic skill-set particular to Amherst: understanding of University research and commercialization, focus on arts and culture, tourism

University of Massachusetts: Role out an “anchor strategy” that embraces Amherst
- Work with dining services to create more opportunity for Amherst restaurants and food services
- Encourage student, faculty, researcher ventures to find a place within Amherst
- Provide Incentives for faculty and staff housing in Amherst
IMPLEMENTATION STEPS

IMPLEMENTATION STEPS
ORGANIZATION AND ECONOMIC DEVELOPMENT

• Create a “strategic plan” for UTAC describing its core focus
• Identify founding board members and sub-committee co-chairs carry effort forward
• Translate strategic plan into mission, by-laws, and budget with sources and uses for approval
• Seek out “quick wins” to demonstrate successful town-gown efforts
  • Makerspace
  • Joint event planning in the downtown
  • Adoption of select recommendations from Commissioner Davis
IMPLEMENTATION STEPS
STUDENT HOUSING

- Refine design for optimal site, including housing unit mix, ground floor program, key design features
- Build a project-specific financial model to identify optimal economic structure, including verification of tax implications
- Work with UMass P3 committee to further understand legal and political implications
- Seek approvals and support from Trustees, Town, other leadership
- Solicit feedback from private sector via Request for Expressions of Interest or similar document