

Greater Lowell Comprehensive Economic Development Strategy (CEDS)



2010-2013 Update



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Beverly Woods, Executive Director
Jay J. Donovan, Assistant Director
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March 26, 2014

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Regional Planning

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Chelmsford

Dracut

Dunstable

Lowell

Pepperell

Tewksbury

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Dear Mr. Taylor:

I am pleased to submit the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) Update for 2010-2013*. In partnership with the Economic Development Administration of the Department of Commerce, NMCOG has continued to maintain a comprehensive economic development program, has supported local economic development projects, and promoted regional economic development initiatives. NMCOG has maintained a grassroots planning process and worked with economic development stakeholders to ensure that the goals identified in the region's Five-Year CEDS are implemented in a manner that proactively responds to economic opportunities and threats. This work is particularly important as the region and nation continue to emerge from the recent recession.

The *Greater Lowell CEDS Update for 2010-2013* identifies the priority projects that are vital to the region's continued economic recovery. NMCOG will strive to continue its work with the local communities, state and federal agencies, non-profit organizations and private sector partners to advance priority projects, such as the Hamilton Canal District redevelopment project, Hamilton Crossing, and the Ayers City Industrial Park in the City of Lowell. Such projects are critical to bringing badly needed economic investment and job opportunities to the area.

NMCOG values its strong and ongoing partnership with the EDA, and appreciates the assistance and support provided by you and your staff. We look forward to continuing this relationship and welcome future opportunities to further strengthen our partnership.

Should you have any questions regarding the *Greater Lowell CEDS Update for 2010-2013*, or the CEDS process in the Greater Lowell area, please feel free to contact Jay Donovan, Assistant Director, at (978) 454-8021, extension 16.

Sincerely,



Beverly Woods
Executive Director

CC: Matthew Suchodolski, Economic Development Representative for
Massachusetts

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I. GREATER LOWELL (CEDS) COMMITTEE

The Northern Middlesex Council of Governments (NMCOG) fulfilled its partnership role with the Economic Development Administration (EDA) of the U.S. Department of Commerce through the maintenance of a continuous, comprehensive economic development planning process, support of local economic development projects and the promotion of regional economic development projects. NMCOG has worked with other economic development stakeholders in the Greater Lowell region to implement the eight goals established in the *Greater Lowell CEDS for 2009-2013* and to respond to economic opportunities and threats. The activities undertaken during this period of time focused principally upon maintaining the CEDS “grass-roots” planning process, identifying and approving CEDS Priority Projects for the region, supporting the economic development initiatives of the private sector and local communities in the Greater Lowell region and completing the *2010-2013 CEDS Update*.

The Greater Lowell CEDS Committee met eight times during the course of this CEDS Planning Grant and continued to play an active role in approving the Request For Proposal (RFP) package for the region’s CEDS Priority Projects identifying, prioritizing and approving the region’s CEDS Priority Projects and recommending the approval of the 2010-2013 CEDS Update to the NMCOG Council. The NMCOG Council relies upon the recommendations of the Greater Lowell CEDS Committee to review and approve the CEDS Priority Projects and the CEDS documents. The Greater Lowell CEDS Committee also provides a forum for representatives of the private sector, state government, community colleges, nonprofit agencies, local officials and other economic development stakeholders to offer their views and input. NMCOG will continue to publicize its CEDS activities through the use of its website and the sponsorship of various forums that address a significant economic development interest.

The Greater Lowell CEDS Committee first met on August 30, 2011 (see Agenda and Minutes in Appendix II) to discuss the Committee’s membership, the Greater Lowell CEDS Program (including the recently approved CEDS planning contract), the proposed CEDS Update for 2010-2013, the work plan and other economic development activities, including the Joint Economic Adjustment Application with the Montachusett Regional Planning Commission (MRPC), MassWorks Projects and District Local Technical Assistance (DLTA) initiatives. Mr. Donovan outlined the CEDS Update process, as well as the components and timeframe for the 2010-2012 CEDS work plan. The role of the CEDS Committee in relation to public forums and other related matters was also clarified. There was some initial discussion regarding potential Economic Development Incentive Program (EDIP) projects to be included in the CEDS Update.

The second CEDS Committee meeting was held on January 24, 2012 (see Agenda and Minutes in Appendix II). The purpose of this meeting was to present a more detailed CEDS Update work plan and timeline to the CEDS Committee. Mr. Donovan described, in detail, the various components of the CEDS Update, including the CEDS Priority Projects and major regional projects section, and two new elements added to the contract: the Tanner Street Initiative in the City of Lowell funded by the Environmental Protection Agency (EPA) and a clean energy component. Mr. Donovan also indicated that a request had been received from EDA for additional public works and economic adjustment projects. The meeting concluded with a comprehensive update on the various economic development activities and events occurring in the region. This discussion primarily focused on the Regional Strategic Plan, which NMCOG had recently been awarded funding to undertake.

The third CEDS Committee meeting took place on April 10, 2012 (see Agenda and Minutes in Appendix II) This meeting involved the appointment and reappointment of CEDS Committee members to the Northern Middlesex Economic Development District (NMEDD), which serves as the non-profit arm of NMCOG. NMEDD is designed to principally provide support on economic development and housing projects for our suburban communities. A status report on the CEDS Update was presented and Mr. Donovan outlined a revised timeframe for completion of the document. Mr. Donovan also advised the Committee that the goal is to complete the Economic Development District (EDD) application in tandem with the Annual CEDS Update. The meeting focused on the status of the CEDS Priority Project Status Report, noting that the report tracks all projects listed in the previous Five-Year CEDS document and identifies completed projects as well as projects still underway. NMCOG staff updated the list based on information obtained from member communities and the NMCOG transportation staff. Mr. Donovan also provided the Committee members with an update on the Siting of Renewable Energy Facilities grant indicating that it was possible that funding could be in place by July 1st, 2012. A discussion on other economic development initiatives, such as the Pre-disaster Mitigation Plan, the DLT A V projects and the Regional Strategic Plan, concluded the meeting.

At the fourth CEDS Committee meeting, held on June 12, 2012 (see Agenda and Minutes in Appendix II), there was considerable discussion on the CEDS Priority Projects. Mr. Donovan emphasized that the purpose of the list was to identify projects that address the eight Greater Lowell CEDS goals established as part of the *Greater Lowell CEDS for 2009-2013*. He also discussed the CEDS Priority Project Status Report, noting that it lists projects that have been completed, such as the EDA Planning Grant (2008) and various Lowell Regional Transit Authority (LRTA) projects, as well as projects underway and dropped projects. Following some discussion regarding a number of projects, the Committee voted unanimously to approve the CEDS Priority Projects list. Additional discussion of other economic development initiatives, including the Pre-disaster Mitigation Plan, DLT A V projects and the Transportation Improvement Program (TIP) concluded the meeting.

The fifth CEDS Committee meeting was held on June 4, 2013 (see Agenda and Minutes in Appendix II). At this meeting, NMCOG staff circulated the updated regional Needs Analysis data and the approved CEDS Priority Projects list from the previous meeting. In regard to the CEDS Priority Projects list, Mr. Donovan advised the Committee that it is a work-in-progress and an updated list would be provided at the next meeting, following additional feedback from members. Committee members were also asked to review the updated Needs Analysis data and provide comments. The Energy component of the CEDS Update and the Siting of Renewable Energy Facilities grant were described in detail. Mr. Donovan noted that the purpose of the Siting grant was to outline actions and measures that encourage the siting of renewable energy facilities within the Northern Middlesex and Montachusett regions. Mr. Donovan outlined the components of the Investing in Manufacturing Communities Partnership sponsored by the Obama Administration. Mr. Donovan also provided an overview of the Westford Economic Target Area (ETA) application, DLT A VI projects and other relevant transportation/economic development projects taking place in the Greater Lowell region.

The sixth CEDS Committee meeting was held on July 23, 2013 (see Agenda and Minutes in Appendix II) Mr. Donovan advised the Committee that NMCOG had submitted a request to the EDA for a contract extension to complete the CEDS Update. Also, through the completion and submission of the EDD grant, NMCOG could be eligible for a three-year planning grant instead

of competing for grant funds every year. The meeting also focused on the economic development initiatives under the DLTA VI project, including the Billerica and Dracut Economic Development Strategies, the Dracut Village Center Overlay District, the Chelmsford Business Outreach Program, the Strategic Action Plan for Vinal Square and the Westford Solar Bylaw & Permitting project. Mr. Donovan informed the Committee that the Commonwealth had funded DLTA VII, which would be available to the Regional Planning Agencies and their member communities sometime in early December. Mr. Donovan also announced that NMCOG and a number of other local agencies and nonprofits had worked with the City of Lowell to submit an application to the Federal Reserve Bank of Boston under the Working Cities Challenge Program, which was designed to create transformative change in the Gateway Cities in Massachusetts.

At the seventh CEDS committee meeting held on October 22, 2013 (see Agenda and Minutes in Appendix II) Mr. Donovan updated the Committee members on the Greater Lowell CEDS program, including the *2010-2013 CEDS Update* and the Siting of Renewable Energy Facilities grant. Mr. Donovan informed the Committee that the EDA planning grant extension had been approved by EDA until December 31, 2013. The Committee members reviewed the updated CEDS Priority Projects list and provided comments on the specific projects. Mr. Donovan then provided a comprehensive update on the DLTA VI projects and the prospect of Economic Opportunity Area (EOA) and Tax Increment Financing (TIF) grant applications from the Town of Westford.

At the final CEDS Committee meeting on January 14, 2014 (see Agenda and Minutes in Appendix II) the Committee approved the CEDS Priority Project list, and recommended that the NMCOG Council approve the *2010-2013 CEDS Update* and submit the document to EDA. The NMCOG Council, based upon the recommendations of the Greater Lowell CEDS Committee, approved and ratified the CEDS Priority Projects and *2010-2013 CEDS Update* on January 15, 2014 for submission to EDA (see *2010-2013 CEDS Update Approval* in Appendix III).

II. ACTIVITIES FOR 2010 – 2013

In implementing the Five-Year Comprehensive Economic Development Strategy (CEDS) established in 2009, the Northern Middlesex Council of Governments (NMCOG) has continued its partnership with the Economic Development Administration (EDA) in encouraging and supporting economic growth in the Greater Lowell region. NMCOG has actively encouraged the economic development stakeholders in the region to work within the CEDS process and provided technical assistance to our local communities in their economic development initiatives. NMCOG has actively promoted regional economic development projects and has expanded its partnerships with the Executive Office of Housing and Economic Development (EOHED), the Merrimack Valley Economic Development Council (MVEDC), the Greater Lowell Workforce Investment Board (GLWIB), the Greater Lowell Chamber of Commerce (GLCC), the Lowell Plan/Lowell Development and Financial Corporation (LDFC), Common Ground, Inc. and the Middlesex 3 Coalition. These partnerships have contributed to the economic vitality of the region and our ability to move projects forward. NMCOG continues to build upon the economic development framework established through the Annual CEDS Process and the Greater Lowell CEDS Committee by identifying additional economic opportunities in the Greater Lowell region.

This section provides a summary of the activities of the economic development stakeholders in the Greater Lowell region during the period from 2010-2013. This section is divided into three parts: Project Development, Goal Attainment, and Capacity Building. The Project Development component identifies specific projects that have been completed during this period. In the Goal Attainment component, the activities during this period are summarized by goal as a means to show how

we've addressed each specific goal developed in the 2009 Five-Year CEDS. This component also summarizes how we've fulfilled our responsibility as a partner to EDA in encouraging the creation of well-paying jobs in the Greater Lowell region. The Capacity Building component summarizes the staffing capacity at NMCOG in meeting its requirements and outlines some of the barriers that the organization has had to overcome. This component summarizes the staff capacity at NMCOG and what needs to be accomplished in order to move ahead and complete the Five-Year CEDS in 2014. This past year has seen many changes at NMCOG and EDA and, hopefully, the changes in 2014 will not be as dramatic. We look forward to working with EDA and fulfilling our role as a true economic development partner.



*Jay Donovan (NMCOG, Assistant Director), was appointed to the Board of Directors of Common Ground Inc. 2012-2013
Source: Common Ground Development Corp.*

A. PROJECT DEVELOPMENT

During the past year, NMCOG maintained its partnership relationship with EDA through the development of the *Greater Lowell CEDS Update for 2010-2013*. Through the use of the EDA Short Term Planning Investment grant, NMCOG was able to initiate its “grass-roots” CEDS planning process and to reach out to economic development stakeholders in the region. The Greater Lowell CEDS Committee held seven (7) meetings during the contract period and an additional meeting in January 2014 to recommend approval of the *Greater Lowell CEDS Update for 2010-2013* to the NMCOG Council. Throughout this process, NMCOG staff received input from its nine municipalities, non-profits and the business community. Evaluation has been maintained as an ongoing process and NMCOG has worked to improve the way that it implements the CEDS program. In 2013 NMCOG received 909,157 requests for information on its web site, which is more than ten times what had been reported previously for the period from February 2008 to June 2008 (83,094). This request for information had as much to do with NMCOG’s dual roles as staff support for the Northern Middlesex Metropolitan Planning Organization (NMMPO), and through the Massachusetts Environmental Policy Act (MEPA) review process (to ensure that development projects “minimize damage to the environment”), as it did with its role in the CEDS planning process. It is unknown how many public agencies, non-profits and small businesses have come to rely upon the demographic data and information developed through the Five-Year CEDS and our Annual CEDS planning process. However, the NMCOG office receives several calls per month on development opportunities in the region based upon the information that is available on the NMCOG web site.

NMCOG co-sponsored and participated in a number of public forums through the course of the program year that focused upon its role as EDA’s partner in the CEDS process. NMCOG staff participated in the City of Lowell’s Economic Development Vision session for the update of their Comprehensive Master Plan on July 25, 2011. NMCOG, in conjunction with the Northeast Regional Brownfields Coalition, MassDevelopment, the Massachusetts Department of Environmental Protection (MassDEP), the Executive Office of Housing and Economic Development (EOHED), the Merrimack Valley Planning Commission (MVPC), and the U.S. Environmental Protection Agency (EPA), Region 1, co-sponsored a Brownfields Forum on October 18, 2011. NMCOG staff presented the results of the Billerica Visioning Session II on November 10, 2011. NMCOG staff attended the Regional Visioning Session for the I-495 Regional Collaborative at Framingham Town Hall on November 15, 2011, which included a focus on the Town of Westford and also set the framework for EOHED’s Regional Strategic Plan (RSP) initiative. NMCOG staff held its Dracut Visioning Session II meeting regarding Dracut Town Center on December 1, 2011. NMCOG scheduled meetings with the Lowell City Council and each Board of Selectmen to make a presentation on the Northern Middlesex Regional Strategic Plan (RSP) and its identification of Priority Development Areas, Priority Preservation Areas and Future Housing Sites within each community. Presentations were made in Billerica on December 5, 2011, Lowell on December 13, 2011, Chelmsford on December 19, 2011, Tewksbury on December 20, 2011, and Westford on December 27, 2011. NMCOG continued these RSP public presentations in 2012 by meeting with the Boards of Selectmen in Dracut on January 9, 2012, Pepperell on January 10, 2012, Dunstable on January 17, 2012, Pepperell and Tyngsborough on January 23, 2012, Westford on January 24, 2012 and Tyngsborough on February 16, 2012. After attending a Tanner Street Community Advisory Committee meeting earlier in the month, NMCOG staff attended the first Tanner Street Community Meeting on January 23, 2012, as well as two other public meetings held on June 18,

2012 and November 29, 2012 by the City. NMCOC staff attended the Economic Development Academy Training Session sponsored by EOHEd in Lawrence on September 9, 2012. NMCOC co-sponsored the Energy Forum held by the Merrimack Valley Economic Development Council (MVEDC) on September 12, 2012 in North Andover, which included a presentation by David Cash, Commissioner of the Massachusetts Department of Public Utilities. NMCOC staff attended the Economic Development Academy Training Session sponsored by EOHEd in Salem on May 22, 2013. NMCOC staff hosted the Strengths, Weaknesses, Opportunities and Threats (SWOT) sessions in Vinal Square for residents on October 3, 2013 and for businesses on November 7, 2013. NMCOC hosted a Citizens Planning Training Collaborative program on Solar Zoning on November 4, 2013.

NMCOC fully supported local economic development efforts by its member communities. NMCOC actively supported and participated in the economic development efforts of the City of Lowell, particularly related to the Hamilton Canal District, Hamilton Crossing and the Tanner Street Initiative. NMCOC staff will continue to work on these projects in 2014. NMCOC staff initially worked on the Route 3A Corridor recommendations under the DLTA program and continued to support the Town on the Middlesex Turnpike Corridor improvements. In addition to these projects, NMCOC staff worked with the Affordable Housing Trust to develop their draft Affordable Housing Production Plan and with the economic development staff to begin work on the Economic Development Strategy. NMCOC staff worked with the Town of Chelmsford on its Chelmsford Town Center, Vinal Square and Business Outreach Project serving the Route 129 corridor businesses. NMCOC supported the Town of Dracut through its work on the Dracut Center study, as well as the efforts with the Dracut Affordable Housing Partnership Committee and the Dracut Economic Development Committee on the Affordable Housing Production Plan and the Economic Development Strategy respectively. NMCOC staff worked with the Town of Dunstable on some of its road improvements, as well as with its organizational development issues. NMCOC staff worked with the Pepperell Affordable Housing Committee to develop the draft Affordable Housing Production Plan and with the Town staff on the Route 113 corridor study. NMCOC staff allocated a great deal of time to the various Tewksbury projects: corridor studies along Routes 38, 133, Woburn Street and East Street; work on the update of the Master Plan; Economic Target Area (ETA) application approved by the Economic Assistance Coordinating Council (EACC) and resulted in a TIF agreement with ThermoFisher; and the Lowell Junction project. NMCOC staff worked with Tyngsborough to finalize the Affordable Housing Production Plan. NMCOC staff worked with the Westford staff and the Westford Economic Development Committee to join the Regional Technology Center ETA through an application to the EACC, which has resulted in an opportunity to work with Cynosure on its expansion efforts. NMCOC staff also worked with Westford to submit its Affordable Housing Production Plan and to receive Green Community designation from the Massachusetts Department of Energy Resources (DOER). NMCOC worked closely with the Executive Office of Housing and Economic Development (EOHEd) to support MassWorks applications from its member communities. During FY 11 EOHEd funded the Kronos Infrastructure project in Chelmsford and the Rivers Edge Development project in Lowell. Although none of the projects were funded in FY 12 or FY 13, the Patrick Administration has made a commitment to fund the Lord Overpass improvements abutting the Hamilton Canal project in Lowell.

NMCOC continued to focus upon providing technical assistance for regional economic development projects. The Hamilton Canal, Tanner Street Initiative and Middlesex 3 Coalition projects were the principal regional projects supported by NMCOC this past year. With the

combined ribbon cutting and ground breaking project on September 7, 2012, the completion of the Revere Street Bridge through the use of EDA Public Works funds and the beginning of the rehabilitation work on the Freudenberg Building began the next phase of the Hamilton Canal project. Adjacent to the Hamilton Canal project, the Hamilton Crossings project has moved forward and provided a new home for the Lowell Community Health Center. The Tanner Street Initiative has evolved into the Ayer's City Industrial Park and NMCOG staff will continue working with the Lowell Department of Planning and Development (DPD) staff to establish an Urban Renewal Area and utilized DIF financing to make the necessary infrastructure improvements. NMCOG staff has been actively involved with the Middlesex 3 Coalition since its kickoff meeting on October 2, 2012 at 600 Technology Park Drive in Billerica. NMCOG staff attended the Annual Meeting on June 14, 2013 at the Courtyard by Marriott Billerica, as well as the celebration of Small Business Week on June 19, 2013 at Cross Point in Lowell. In addition to these projects, the NMCOG transportation staff has been actively involved in the Rourke Bridge/Wood Street Study and the trolley expansion project in the City of Lowell. UMass Lowell has played a major role in helping the regional economy recover through its many building projects: rehabilitation of the \$ 7.6 million UMass Lowell Inn & Conference Center, refurbishment of the \$ 5 million Tsongas Center, building of the \$ 80 million Emerging Technologies and Innovation Center, opening of the \$ 40 million Health and Sciences Building, creation of the \$ 54 million University Suites building and the \$ 42 million Riverview Suites residence hall, and the construction of the North and South Campus Garages. Currently, UMass Lowell is constructing its \$ 95 million University Crossing student services center and designing the new Pulichino Tong Business Building. Recently, the \$ 32 Million Howe Bridge was completed by MassDOT to link the UMass North Campus with downtown Lowell. The presence of UMass Lowell students in downtown Lowell alone has a significant impact upon the local economy. More detail on these projects can be found in the Major Regional Projects section.

B. GOAL ATTAINMENT

NMCOG has maintained its role as EDA’s regional economic development partner through the maintenance of “a continuous, comprehensive economic development planning process” for the Greater Lowell region, support for local economic development projects and promotion of regional economic development projects. Through the use of the Greater Lowell CEDS Committee, NMCOG has received input from the major economic development stakeholders in the region. Through the use of its professional staff, NMCOG has implemented the Five-Year CEDS goals established in 2009 and will be initiating the Five-Year CEDS process for 2014-2018. The goals established in next year’s Five-Year CEDS are likely to be different from those established in 2009 due to changing economic conditions and evolving regional focus.

The purpose of this section is to summarize how NMCOG and its economic development partners addressed the Five-Year CEDS Goals through the implementation of this contract period’s program. The following information summarizes what NMCOG and the other economic development stakeholders in the region were able to accomplish between July 18, 2011 and December 31, 2013:

1. Five-Year CEDS Goals:

Economic Development: *Develop a regional economic development framework that supports the efforts of private industry, local communities and agencies, educational institutions, federal and state agencies and private foundations to create jobs and improve the quality of life in the region.*

- Hamilton Canal project moves forward. Redevelopment of the \$ 8.5 Freudenberg Building begins as of September 2012 and will create 400 full-time permanent jobs. City of Lowell received an EOA designation from the Economic Assistance Coordinating Council (EACC) in May 2013 for the Freudenberg Building enabling it to qualify for a Tax Increment Financing (TIF) Agreement with the City of Lowell. The Lowell Judicial Center was awarded \$ 1.2 million in design funding from the Patrick Administration in October 2012 with the expected construction taking place in the spring of 2014.
- Borrego Solar Systems agrees to expand in Lowell by 15-25% in February 2012. PlumChoice relocates to Cross Point in Lowell bringing 200 jobs in October 2012.
- Cornerstone Square project in Westford nears completion in September 2012 after providing 300 construction jobs and expected to provide 700 jobs upon completion.
- The Middlesex 3 Coalition, comprised of Burlington, Bedford, Billerica, Chelmsford and Lowell, kicks off its operation in October 2012. EOHED works with local communities to market Route 3 as an investment opportunity for private investors.
- Thermo Fisher Scientific adds 100 jobs in Chelmsford in December 2012 and then relocates some other offices to Tewksbury in May 2013 as part of an \$ 18.2 million investment at Ames Pond Corporate Park as part of a TIF Agreement with the Town of Tewksbury.

- Cambridge Isotope Laboratories, Inc. leases space at Highland Office Park in Tewksbury in December 2012.

Workforce Development: *Increase the supply of skilled workers for industry in the region through the integration of the economic development and workforce development systems.*

- The Greater Lowell Workforce Investment Board (GLWIB) completed its Strategic Plan for 2009-2014. The Strategic Plan is designed to support the Patrick Administration’s three stated priorities: build capacity of the workforce system; close the skill gap that exists between available workers and employers; and enhance the youth pipeline. The mission of the GLWIB was described as “a collaborative involving employers, educational institutions, labor groups, municipal and state officials, and community-based organizations that provides leadership, policy direction, and accountability for the local workforce development system”.

Education: *Improve the educational and workforce skills of primary, secondary and college students to meet the needs of industry in the future.*

- UMass Lowell \$ 80 million Emerging Technologies and Innovation Center opens on October 11, 2012.
- UMass Lowell partners with Raytheon Integrated Defense Systems and Gulf University for Science and Technology (GUST) in Kuwait in November 2012 to develop joint degree programs at the undergraduate and master’s levels.
- UMass Lowell establishes partnership with the U.S. Army under HEROES (Harnessing Emerging Research Opportunities to Empower Soldiers) project in February 2013.

Affordable Housing: *Create more affordable and market-rate housing throughout the region to ensure that businesses can expand and relocate to the region with the assurance that their workforce will be able to own, lease or rent quality housing.*

- Appleton Mills project in the Hamilton Canal is completed providing 130 new affordable housing units.
- Lowell Housing Development Incentive Plan approved by the Department of Housing and Community Development (DHCD) in November 2012.
- Ava Estates townhouse development with twenty-six units approved in Billerica as of December 2012.
- Hillside Gardens (44 two-bedroom units) in Chelmsford was approved by an Appeals Court judge in November 2012.
- Lowell City Council approves the redevelopment of Varnum School into twenty-two two- and three-bedroom units for veterans as of December 2012.
- Westford assisted-living facility to open in June 2013.

- Chelmsford and Westford will build 13 units of veterans housing through a grant from the Department of Housing and Community Development and local funds in February 2013.
- Affordable Housing Production Plans for Westford, Tewksbury and Tyngsborough were approved by the Department of Housing and Community Development (DHCD) in 2012 and 2013.
- Draft Affordable Housing Production Plans were developed for Dracut, Pepperell and Billerica as of December 2013.

Regional Transportation System: *Develop the infrastructure needed to build upon the strengths of the regional highway system and the public transit networks to enhance access to the economic centers of the region.*

- Revere Street Bridge in the Hamilton Canal completed in August 2012 with the assistance of a \$ 2 million EDA Public Works grant.
- Lowell Regional Transit Authority (LRTA) receives \$ 2.5 million in federal transportation funding for the reconstruction of the Gallagher Terminal Parking Garage in October 2012.
- Lowell Regional Transit Authority (LRTA) to expand Saturday service as of January 12, 2013.
- The Town of Acton, in conjunction with Westford and five other towns, received a \$ 184,575 Community Innovation Challenge (CIC) grant to establish a regional transportation association.
- University Avenue Bridge completed as of November 2013.

Infrastructure: *Build upon the existing sewer, water, telecommunication and public utility infrastructure to increase capacity so that private businesses and homeowners can grow in the future.*

- Lowell City Council agrees to support municipal aggregation plan in November 2012 to procure electricity in bulk.
- Northern Middlesex Council of Governments (NMCOG) received a Community Innovation Challenge grant for \$ 98,000 to begin a stormwater education and management program.
- Financial Investments: Target federal, state, local, non-profit and private funds to those projects that create jobs and improve the quality of life in the neighborhoods.
- The Massachusetts Life Sciences Center awarded UMass Lowell a \$ 10 million capital grant to support construction of UMass Lowell's Emerging Technologies and Innovation Center in April 2012.
- Patrick Administration invests \$ 607 million in the University of Massachusetts system with \$ 25 million going to the construction of the \$ 35 million Pulichino Tong Business Building at UMass Lowell.

- Gateway Cities Innovation Institute of MassINC recommends pumping \$ 1.7 billion into Gateway Cities, like Lowell, to help spur economic development.

***Quality of Life:** Maintain the community character in the region by preserving and protecting the region's natural, cultural and historic resources and encouraging concentrated development.*

- The Massachusetts Cultural Council formerly designated the Canalway Cultural District, stretching from the Boott Cotton Mills Museum and Boarding House Park to the American Textile Museum, as an official state Cultural District in downtown Lowell in August 2012.
- Chelmsford Town Center Study released to the Center Village Master Plan Committee in October 2012.
- Citizens meet in Lowell to provide input to the proposed new master plan – Sustainable Lowell 2025- in January 2013,
- The Lowell National Historical Park received \$ 564,400 from the Federal Transit Administration in February 2013 to upgrade its trolley system.

C. CAPACITY BUILDING

The Northern Middlesex Council of Governments (NMCOG) made a commitment to rebuild its economic development capacity in 2002. NMCOG was able to secure an economic adjustment grant for \$ 15,000 from EDA and to complete the “*Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2004-2008*”. Since that time, NMCOG has been able to apply for and secure short-term planning assistance from EDA in order to maintain its “grass-roots” CEDS planning process. Additionally, NMCOG has been able to broaden its economic development program through other funding sources, which has enabled it to provide ongoing economic development support for the City of Lowell and the eight surrounding towns in the region. NMCOG has played a prominent role with other economic development stakeholders in the Greater Lowell region in supporting regional economic development programs and tying these initiatives in with the transportation infrastructure program in the region.

NMCOG serves as staff support to the Northern Middlesex Metropolitan Planning Organization (NMMPO) and provides ongoing planning assistance to the Lowell Regional Transit Authority (LRTA) on its regional transit programs. Transportation funds from MassHighway, the Federal Transit Administration (FTA) and the LRTA comprise nearly 70% of NMCOG’s entire budget. With the increase in funds from programs such as the District Local Technical Assistance (DLTA) program, the NMCOG annual budget nearly doubled from \$ 750,828 in FY 2006 to \$1.4 million in 2013. The staff hiring during this period has been largely determined by the program funds available. Therefore, when Courtney Knapp, the Housing and Economic Development Planner, left for Graduate school in July 2010, the position was not refilled. Instead, Nat Strosberg was hired as the Land Use and Permitting Planner in July 2011 and was assigned numerous DLTA tasks and the CEDS Program. During this grant period, NMCOG experienced significant staff turnover with seven additional staff people moving on to other positions or retiring. Nat Strosberg also moved on to another position in March 2013. Additional staff has been hired since that time – Danielle Mucciarone as the Energy and Environmental Planner (1/14/13), Suzannah Bigolin as the Housing and Economic Development Planner (11/12/13) and Carmen Bellerose as the Financial Officer (12/9/13). With the anticipated hiring of a Land Use/Transportation Planner in 2014, NMCOG will finally be back at its full staffing level.

NMCOG has valued its partnership arrangement with EDA and has worked closely with Matthew Suchodolski as the Economic Development Representative (EDR) for Massachusetts. NMCOG has worked with Matthew to promote the region and to apprise him on the specific selling points of economic development projects in the region. On September 7, 2012 the Regional Director, Willie Taylor, and Matthew participated in a ribbon cutting event for the completed Revere Street bridge and the ground breaking for work on the Freudenberg Building (110 Canal Street) in the Hamilton Canal project. It was also anticipated that either Willie or Matthew would join us for the Lowell Manufacturing Community Roundtable sponsored by the Environmental Protection Agency (EPA) in February 2014. This roundtable was expected to focus on the Hamilton Canal and Tanner Street projects in Lowell.

In developing the Annual CEDS Update for 2010-2013, NMCOG has operated with limited staff and financial resources. The short-term capacity grant from EDA greatly assisted us in this effort and maintains the “grass-roots” CEDS process going on a “continuous, comprehensive basis”. Without these critical resources, it would be difficult for NMCOG to support this effort

financially through other public or private funds, notwithstanding the fact that DLTA funds have been dedicated to supporting local economic development initiatives. NMCOG has completed a draft Economic Development District (EDD) application that can be edited and submitted to EDA in 2014. Without a steady source of funding from EDA, the CEDS process will only continue if NMCOG is successful in competing for annual grants. NMCOG will also need to activate its non-profit arm, the Northern Middlesex Economic Development District, Inc. (NMEDD), so that we can have access to other private, non-profit and public funds in the economic development and affordable housing areas. NMCOG relies upon its volunteer Councilors, Alternates, CEDS Committee members and NMEDD members for feedback and direction in implementing critical economic development projects in the region.

NMCOG has actively promoted regional economic development projects and has expanded its partnerships with the Executive Office of Housing and Economic Development (EOHED), the Merrimack Valley Economic Development Council (MVEDC), the Greater Lowell Workforce Investment Board (GLWIB), the Greater Lowell Chamber of Commerce (GLCC), the Lowell Plan/Lowell Development and Financial Corporation (LDFC), Common Ground, Inc. and the Middlesex 3 Coalition. These partnerships have contributed to the economic vitality of the region and our ability to move projects forward. NMCOG continues to build upon the economic development framework established through the Annual CEDS Process and the Greater Lowell CEDS Committee by identifying additional economic opportunities in the Greater Lowell region. While our principal focus has been on the City of Lowell, NMCOG continues to address economic issues in the suburban communities as well. NMCOG has been able to assist Billerica, Chelmsford, Dracut, Pepperell, Tewksbury, Tyngsborough and Westford in their economic development efforts, and has provided technical support for the City of Lowell. The economic future of each of these communities is dependent upon what happens economically in the Greater Lowell region, which is where the Greater Lowell CEDS Committee and the Annual CEDS documents have a major impact.

The economic development capacity at NMCOG has grown appreciably since 2002. With the recent hiring of an Economic Development and Housing Planner, NMCOG is prepared to complete the Siting of Renewable Energy Facilities Study grant in cooperation with the Massachusetts Regional Planning Commission (MRPC), apply for competitive EDA grant funds to develop the *Greater Lowell CEDS for 2014-2018* and submit the application for EDD designation. NMCOG looks forward to maintaining its economic development partnership with EDA.

III. THE REGIONAL ECONOMY

The Regional Economy section provides an overview of the current economic conditions in the Greater Lowell region by updating key statistical data previously provided in the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*. By providing this “snapshot” of the regional economy, existing economic conditions can be assessed and policies adjusted to address current conditions and to build upon the region’s available economic opportunities. The annual re-assessment of the Regional Economy also provides direction for the future goal-setting process as well. This section provides the most current information available, including population figures, estimates and projections, employment (unemployment rates, labor force figures, employment projections, closings/layoffs, current employment and tax rates) and housing market data (household projections, housing sales and prices, Chapter 40B inventory and foreclosures).

A. NEEDS ANALYSIS UPDATE

1. Population Figures and Estimates

Since the completion of the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*, the U.S. Census Bureau released new population figures for the Greater Lowell region as part of the 2010 U.S. Census. This new data shows that the Greater Lowell region experienced a 2% population growth rate between 2000 and 2010 reaching 286,901 residents. The U.S. Census Bureau then released its updated population estimates through the American Community Survey (ACS) for 2008-2012. According to these figures, the total population estimate for the Greater Lowell region was 288,149. Regional growth has been modest in comparison to the earlier projections used in the *Greater Lowell CEDS for 2009-2013*. These changes were largely due to the housing crisis and national recession, which impacted the region at the end of 2008.

Table 1: Greater Lowell Region Population Figures and Estimates: 2000 - 2012

| Community | 2000 Census | 2010 Census | 2008-2012 ACS | % Change between 2000-2010 | % Change between 2010-2012 |
|------------------------------|----------------|----------------|----------------|----------------------------|----------------------------|
| Billerica | 38,981 | 40,243 | 40,479 | 3.2 | 0.6 |
| Chelmsford | 33,858 | 33,802 | 33,931 | -0.2 | 0.4 |
| Dracut | 28,562 | 29,457 | 29,573 | 3.1 | 0.4 |
| Dunstable | 2,829 | 3,179 | 3,190 | 12.4 | 0.3 |
| Lowell | 105,167 | 106,519 | 106,739 | 1.3 | 0.2 |
| Pepperell | 11,142 | 11,497 | 11,537 | 3.2 | 0.3 |
| Tewksbury | 28,851 | 28,961 | 29,109 | 0.4 | 0.5 |
| Tyngsborough | 11,081 | 11,292 | 11,484 | 1.9 | 1.7 |
| Westford | 20,754 | 21,951 | 22,107 | 5.8 | 0.7 |
| Greater Lowell Region | 281,225 | 286,901 | 288,149 | 2.0 | 0.4 |

Source: U. S. Census Bureau, 2000 Census, 2010 Census and 2008-2012 American Community Survey (ACS)

As outlined in Table 1 above, the City of Lowell’s population grew by only 1.3% between 2000 and 2010 or by 1,352. Although Dunstable experienced the highest growth rate at 12.4% for the

same period of time, this only reflected the addition of 350 residents. Chelmsford experienced the only decline in population through the loss of 56 residents. The 2008-2012 ACS population estimates reflect increased population growth in every Northern Middlesex community.

2. Population Projections

Following the release of the 2010 U.S. Census figures, the Massachusetts Department of Transportation (MassDOT) refined its population projections for the region. These population projections are based upon a statewide model that assigns a specific share to each Metropolitan Planning Organization (MPO) region and then to its individual communities. The projections for the Greater Lowell region have been modified slightly based upon the comments NMCOG provides.

Table 2: Greater Lowell Region Population Projections 2010-2035

| Community | 2010 | | 2017 | 2020 | 2025 | 2030 | 2035 | | %Change 2010- 2035 |
|----------------------------------|----------------|--------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------------------|
| | Pop. | % Share | | | | | Pop. | % Share | |
| Billerica | 40,243 | 14.0 | 40,430 | 40,690 | 41,340 | 41,810 | 42,560 | 13.3 | 5.8 |
| Chelmsford | 33,802 | 11.8 | 34,280 | 34,750 | 35,260 | 35,880 | 36,480 | 11.4 | 7.9 |
| Dracut | 29,457 | 10.3 | 31,060 | 32,080 | 33,140 | 34,630 | 36,160 | 11.3 | 22.8 |
| Dunstable | 3,179 | 1.1 | 3,520 | 3,560 | 3,950 | 4,370 | 4,800 | 1.5 | 51.0 |
| Lowell | 106,519 | 37.1 | 106,650 | 106,920 | 108,220 | 109,820 | 111,360 | 34.8 | 4.5 |
| Pepperell | 11,497 | 4.0 | 12,600 | 13,070 | 13,680 | 14,660 | 15,360 | 4.8 | 33.6 |
| Tewksbury | 28,961 | 10.1 | 29,600 | 30,000 | 31,020 | 31,820 | 32,640 | 10.2 | 12.7 |
| Tyngsborough | 11,292 | 3.9 | 12,010 | 12,470 | 13,070 | 13,740 | 14,400 | 4.5 | 27.5 |
| Westford | 21,951 | 7.7 | 22,850 | 23,460 | 24,320 | 25,270 | 26,240 | 8.2 | 19.5 |
| Greater Lowell Region | 286,901 | 100.0 | 293,000 | 297,000 | 304,000 | 312,000 | 320,000 | 100.0 | 11.5 |

Source: MassDOT projections with input from NMCOG

Given the reduced rate of growth that was experienced between 2000 and 2010, the updated projections offer a different picture of the region's future population change over the next two decades. Population growth across the region, as a whole, and for each community is expected to be steady. The region is expected to grow by 11.5% between 2010 and 2035 with a total population of 320,000 by 2035. The region's population was expected to be 343,800 by 2030 in the population projections outlined in the *Greater Lowell CEDS for 2008-2013*, while these updated projections forecast a regional population of 312,000 by 2030. The decline in population projections represents a 9% decrease in the previously forecasted figures.

As shown in Table 2 above, the City of Lowell's growth between 2010 and 2035 is anticipated to be fairly modest, increasing by 4.5%. The more developed suburban communities, such as Billerica, Chelmsford and Tewksbury, anticipate slightly higher growth rates during this same period of time ranging from 5.8% in Billerica to 12.7% in Tewksbury. In contrast, the Towns of Dunstable, Pepperell, Tyngsborough, and Westford are expected to grow at faster rates, ranging from 19.5% in Westford to 51% in Dunstable. Just as the regional population projections are much lower in these updated forecasts, as compared to those prepared in 2008, the community population projections have been impacted as well.

3. Regional Employment

When the *Greater Lowell CEDS for 2009-2013* was being completed, the housing crisis and economic recession were just beginning to have a significant impact on the Greater Lowell region. In 2007 and 2008, six out of the nine Greater Lowell communities suffered plant layoffs, primarily in the high tech manufacturing, information technology, and retail sectors. Other economic indicators, such as the number of establishments, unemployment rates, average

In a release published on June 20, 2013, the Massachusetts Executive Office of Labor and Workforce Development reported that the Bureau of Labor Statistics' (BLS) preliminary estimates show that Massachusetts added 3,500 jobs in May and the total unemployment rate slightly increased to 6.6 percent. Trade, Transportation, and Utilities; Construction; Financial Activities; Professional, Scientific, and Business Services; Other Services; and Education and Health Services added jobs in May. In the first five months of 2013, Massachusetts added 14,500 jobs. Over the year, Massachusetts added 49,600 jobs, 46,900 of which were in the private sector. Over the year, the unemployment rate was down 0.1 of a percentage point from the May 2012 rate of 6.7 percent. Revised BLS estimates show 3,300 jobs lost in April.

monthly employment, number of foreclosures, housing sales and median housing prices were also negatively affected by the struggling housing market and the national recession.

While layoffs have continued to occur between 2010 and 2013 maintaining higher unemployment rates in some areas, on the whole there are signs of economic recovery beginning to occur across the region. This section of the *CEDS Update for 2010-2013*, summarizes the specific differences between what the region was experiencing in 2009 and what has generally occurred between July 2011 and July 2013. It provides an overview of the labor force, employment levels and unemployment rates for the region and the Greater Lowell communities, in comparison to the state and the nation as a whole. A listing of plant closings developed by the Massachusetts Rapid Response Team and a list of major employers provided by the Executive Office of

Labor and Workforce Development is presented in the following sections. Updated information on the number of establishments, employment levels, average wages and industry composition is also provided. The FY 13 tax rates for each community are included as well.

a. Labor Force

The number of people available for work in the Greater Lowell region labor force increased by 1.3% between July 2011 and July 2013 to 156,159 people. This is a slightly higher increase than at the state level, which recorded an increase of 1.0% in labor force numbers during the same timeframe. Tyngsborough had the highest rate of growth at 4.1%, followed by Westford at 3.4%. Chelmsford (1.1%), Dracut (1.0%) and Lowell (0.3%) experienced the lowest growth in labor force numbers. It is noted that most of the gains in labor force numbers, both for the state and the region, have occurred in the first half of 2013 as opposed to the preceding years.

Table 3: Labor Force Levels by Community and Region (not seasonally adjusted)

| Community | 2010 Annual | 2011 Annual | 2012 Annual | July 2011 | July 2013 | % Change July 2011 – July 2013 |
|------------------------------|----------------|----------------|----------------|----------------|----------------|--------------------------------|
| Billerica | 22,653 | 22,535 | 22,749 | 22,571 | 22,968 | 1.8 |
| Chelmsford | 18,988 | 18,957 | 19,000 | 19,012 | 19,218 | 1.1 |
| Dracut | 16,819 | 16,697 | 16,770 | 16,761 | 16,928 | 1.0 |
| Dunstable | 1,826 | 1,833 | 1,869 | 1,838 | 1,880 | 2.3 |
| Lowell | 52,491 | 52,391 | 52,241 | 52,536 | 52,719 | 0.3 |
| Pepperell | 6,510 | 6,448 | 6,563 | 6,389 | 6,567 | 2.8 |
| Tewksbury | 16,551 | 16,505 | 16,551 | 16,586 | 16,806 | 1.3 |
| Tyngsborough | 6,419 | 6,400 | 6,619 | 6,436 | 6,698 | 4.1 |
| Westford | 12,019 | 11,943 | 12,218 | 11,971 | 12,375 | 3.4 |
| Greater Lowell Region | 154,276 | 153,709 | 154,580 | 154,100 | 156,159 | 1.3 |
| Massachusetts | 3,473,842 | 3,465,850 | 3,470,258 | 3,499,700 | 3,535,400 | 1.0 |

Source: Massachusetts Executive Office of Labor and Workforce Development, Labor Force Data

b. Employment Levels

According to the Executive Office of Labor and Workforce Development, the number of residents employed within the Greater Lowell region increased by 2,539 or 1.8% between the second quarters of 2011 and 2013. The region's employment levels grew approximately 0.6% more than the state average of 1.2% for the same period. Every community in the region experienced growth of at least 1.0% in employment, with Tyngsborough's employment levels growing the most with a 4.9% increase. In terms of net change, employment levels increased most in Lowell where the number of residents employed grew by 480. This represents a significant change from 2009 when employment figures had declined by 2.2% over the previous five years. Table 4 on the following page highlights the change in employment levels at the community, regional and state levels between 2010 and July 2013.

Mercury Computer, headquartered in Chelmsford, laid 94 workers off in September 2012. "The uncertainties surrounding the U.S. defense budget and resulting slowdown in defense program funding and contracting ultimately affected our first-quarter business more significantly than we initially anticipated," said Mercury Computer CEO Mark Aslett. Mercury delivers innovative, commercially developed, open sensor and Big Data processing systems for critical commercial, defense and intelligence applications.

Source: Lowell Sun, October 7, 2012



Table 4: Employment Levels by Community and Region (not seasonally adjusted)

| Community | 2010 Annual | 2011 Annual | 2012 Annual | July 2011 | July 2013 | % Change July 2011 – July 2013 Net % | |
|------------------------------|----------------|----------------|----------------|----------------|----------------|--------------------------------------|------------|
| Billerica | 20,857 | 21,025 | 21,313 | 21,011 | 21,454 | 443 | 2.1 |
| Chelmsford | 17,675 | 17,821 | 17,919 | 17,809 | 18,037 | 228 | 1.3 |
| Dracut | 15,361 | 15,489 | 15,633 | 15,479 | 15,736 | 257 | 1.7 |
| Dunstable | 1,717 | 1,732 | 1,770 | 1,731 | 1,782 | 51 | 2.9 |
| Lowell | 47,116 | 47,483 | 47,619 | 47,452 | 47,932 | 480 | 1.0 |
| Pepperell | 6,024 | 6,032 | 6,188 | 5,958 | 6,151 | 193 | 3.2 |
| Tewksbury | 15,271 | 15,394 | 15,520 | 15,384 | 15,622 | 238 | 1.5 |
| Tyngsborough | 5,891 | 5,940 | 6,186 | 5,936 | 6,227 | 291 | 4.9 |
| Westford | 11,219 | 11,312 | 11,586 | 11,304 | 11,662 | 358 | 3.2 |
| Greater Lowell Region | 141,131 | 142,228 | 143,734 | 142,064 | 144,603 | 2,539 | 1.8 |
| Massachusetts | *3,186,575 | *3,212,208 | *3,235,042 | 3,237,700 | 3,276,800 | 39,100 | 1.2 |

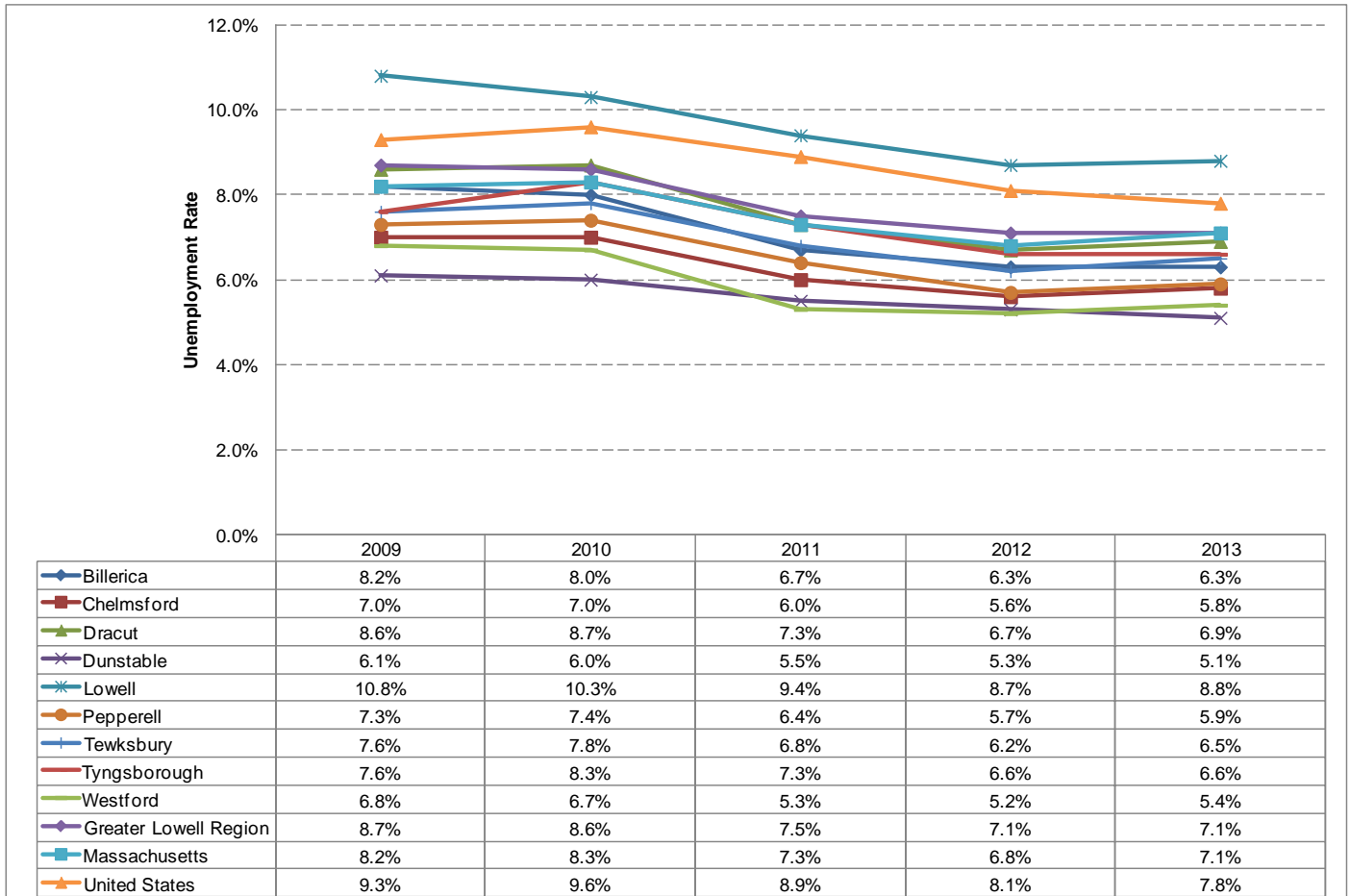
Source: Massachusetts Executive Office of Labor and Workforce Development, Employment Data
* Estimate by NMCOG

4. Pockets of Distress in the Region

a. Unemployment Rates and Per Capita Income

As the economy has begun to rebound from the 2008 national recession, the annual unemployment rate for the Greater Lowell region has decreased from 8.7% in 2009 to 7.1% in 2013. While national and state unemployment rates have also decreased during this period, the Greater Lowell regional unemployment rates have fallen faster than both the state and national levels. It is noted that the regional unemployment rate for 2013 remains unchanged at 7.1%, while the national unemployment rate decreased by .3 % and the state unemployment rate increased by .3%. Summarized in Figure 1, on the following page, are the unemployment rates for the Greater Lowell region, the state and the nation.

Figure 1: Annual unemployment rates for Greater Lowell Region, State and Nation (2009 - 2013)



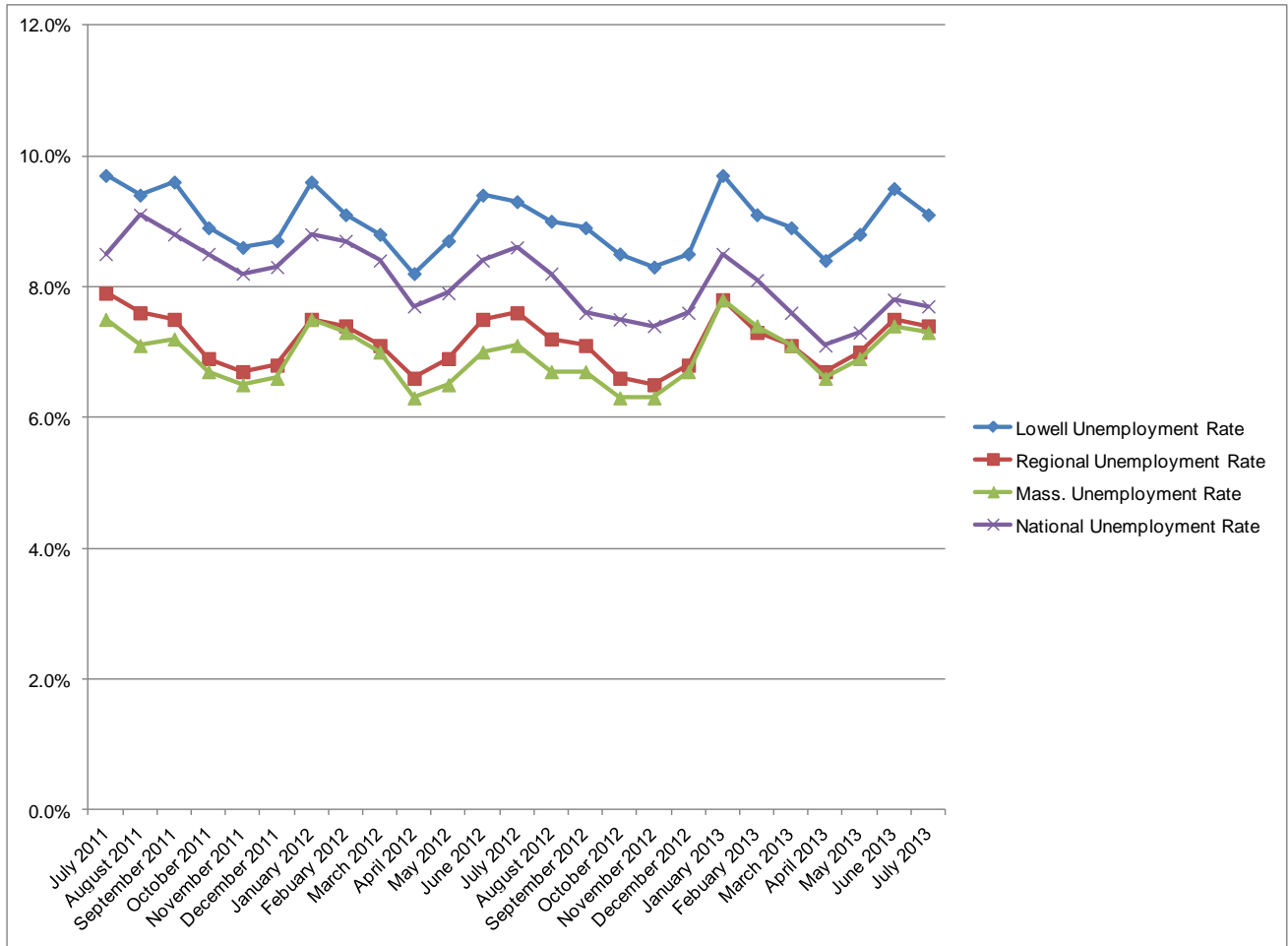
Source: Massachusetts Executive Office of Labor and Workforce Development and Bureau of Labor Statistics

The data shown above indicates that unemployment rates in every community across the region fell between 2010 and 2012. However, in 2013 the annual unemployment rate either increased or remained unchanged in all communities, except for Dunstable, and the overall regional rate remained at 7.1%. The community unemployment rates are generally consistent with the state unemployment rate, which also increased in 2013. In 2013, Dunstable (5.1%) and Westford (5.4%) had the lowest unemployment rates in the region, while the City of Lowell had the highest (8.8%). The remaining towns had unemployment rates ranging from 5.8% in Chelmsford to 6.9% in Dracut.

The City of Lowell, which had an average unemployment rate of 8.7% in 2012 and 8.8% in 2013, is the only community in the region with an unemployment rate greater than both the state and nation. The unemployment rate is an important indicator of economic distress in the region, which is used by the Economic Development Administration to designate a community as an Economically Distressed Area. As shown in Figure 2 on the next page, Lowell’s unemployment rate over the past twenty-four (24) months has been consistently higher than the national unemployment rate.

On average, according to Table 5 on the next page, Lowell's unemployment rate has been 0.9% higher than the national rate. In general, a community's unemployment rate for the past twenty-four months needs to be at least 1% above the national unemployment rate for the same period of time in order to be designated as an Economically Distressed Area. However, most of the Census Tracts within the City of Lowell meet or exceed this threshold.

Figure 2: Comparing Lowell's Unemployment Rate to the Greater Lowell Region, State and Nation: July 2011 – July 2013 (not seasonally adjusted)



Source: Massachusetts Executive Office of Labor and Workforce Development, Labor Force and Unemployment Data

Another indicator of economic distress is per capita income levels. According to the 2008-2012 American Community Survey, Lowell's per capita income figure was \$23,793, which was approximately 85% of the national per capita income figure of \$28,051. However, the majority of Census Tracts in Lowell are well below the 80% national per capita income figure. The following Census Tracts are eligible for EDA funding based upon their per capita income figures: 3101, 3103-3105, 3107, 3111-3113, 3117-3121, 3124 and 3883. No other Census Tracts or communities meet the per capita income criteria for EDA funding.

**Table 5: Lowell and National Monthly Unemployment Rates July 2011 - June 2013
(not seasonally adjusted)**

| Date | Lowell Unemployment Rate | National Unemployment Rate | Difference Lowell - Nation |
|------------------------------|-----------------------------|-------------------------------|-------------------------------|
| July 2011 | 9.7% | 8.5% | 1.2% |
| August 2011 | 9.4% | 9.1% | 0.3% |
| September 2011 | 9.6% | 8.8% | 0.8% |
| October 2011 | 8.9% | 8.5% | 0.4% |
| November 2011 | 8.6% | 8.2% | 0.4% |
| December 2011 | 8.7% | 8.3% | 0.4% |
| January 2012 | 9.6% | 8.8% | 0.8% |
| February 2012 | 9.1% | 8.7% | 0.4% |
| March 2012 | 8.8% | 8.4% | 0.4% |
| April 2012 | 8.2% | 7.7% | 0.5% |
| May 2012 | 8.7% | 7.9% | 0.8% |
| June 2012 | 9.4% | 8.4% | 1.0% |
| July 2012 | 9.3% | 8.6% | 0.7% |
| August 2012 | 9.0% | 8.2% | 0.8% |
| September 2012 | 8.9% | 7.6% | 1.3% |
| October 2012 | 8.5% | 7.5% | 1.0% |
| November 2012 | 8.3% | 7.4% | 0.9% |
| December 2012 | 8.5% | 7.6% | 0.9% |
| January 2013 | 9.7% | 8.5% | 1.2% |
| February 2013 | 9.1% | 8.1% | 1.0% |
| March 2013 | 8.9% | 7.6% | 1.3% |
| April 2013 | 8.4% | 7.1% | 1.3% |
| May 2013 | 8.8% | 7.3% | 1.5% |
| June 2013 | 9.5% | 7.8% | 1.7% |
| Average for 24 months | 9.0% | 8.1% | 0.9% |

Source: Executive Office of Labor and Workforce Development Data

b. Plant Layoffs

Since the completion of the *Greater Lowell CEDS for 2009-2013*, the City of Lowell and several towns have been impacted by layoffs from private firms located within the region. According to reports from the Commonwealth's Rapid Response Team, there were 1,954 layoffs across five communities from July 2009 through January 2013. In 2009, the regional layoffs were highest at 769, while only 247 layoffs were recorded in 2011. This compares favorably with the 1,200 layoffs for the 2008-2009 period, which were outlined in the 2009 *Greater Lowell CEDS for 2009-2013*.

As shown in Table 6 on the following page, Billerica had the largest number of layoffs at 794, or 40% of the total. Lowell came in second at 469, or 24% of the total number of layoffs. While there are signs that the economy is recovering, layoffs nearly doubled from 2011 (247) to 2012 (449). From 2009 to 2012, the largest numbers of employees were eliminated from Jabil Circuit (315), Schott Solar (215), and Mercury Computer (94). Outlined in Table 6 on the next page are the documented layoffs in the Greater Lowell region based on data provided by the Massachusetts Rapid Response Team.

Table 6: Layoffs in the Greater Lowell Region: July 1, 2009 – January 31, 2013

| Community | Company | Effective Date | Employees Affected |
|-------------------------------|-----------------------------|------------------------|--------------------|
| Billerica | Jabil Circuit | 9/1/2009 | 315 |
| | Iron Mountain | 12/31/2009 | 18 |
| | Schott Solar Inc. | 12/31/2009 | 215 |
| | Welch Foods Inc. | 2/11/2010 | 9 |
| | H&R Block | 5/31/2010 | 21 |
| | Henkel Corp. | 9/15/2010 | 25 |
| | Office Depot | 9/20/2010 | 58 |
| | Office Max | 9/20/2010 | 12 |
| | Aastra USA Inc. | 9/30/2010 | 12 |
| | EMD Serono Biotech Center | 1/10/2011 | 25 |
| | Solid State Testing Inc. | 1/28/2011 | 27 |
| | Vislink Inc. | 2/18/2011 | 27 |
| | Friendly's | 10/4/2011 | 20 |
| | Fashion Bug | 2/21/2012 | 10 |
| | Chelmsford | Sycamore Networks Inc. | 7/31/2009 |
| ConMed Endoscopic Tech. | | 10/31/2009 | 45 |
| ESA Laboratories-A Dion | | 3/31/2011 | 25 |
| Fashion Bug | | 2/21/2012 | 10 |
| Town & Country Transportation | | 6/30/2012 | 31 |
| Mercury Computer Systems | | 9/30/2012 | 94 |
| Sycamore Networks Inc. | | 10/25/2012 | 26 |
| Brooks Automation Inc. | | 1/5/2013 | 44 |
| Dracut | Dracut School Dept. | 6/30/2012 | 54 |
| Lowell | Double Tree Hotel | 7/31/2009 | 55 |
| | Classic Floors Inc. | 9/17/2009 | 5 |
| | GES US Inc. | 3/31/2010 | 92 |
| | Cass Information Systems | 4/1/2010 | 48 |
| | High Tech Assemblies | 4/14/2010 | 20 |
| | Lowell Community Charter | 7/31/2010 | 70 |
| | Classic Floors Inc. | 8/12/2010 | 3 |
| | Lowell Community Charter | 6/30/2011 | 25 |
| | Segue Manufacturing Service | 11/11/2011 | 25 |
| | Fashion Bug | 2/21/2012 | 10 |
| | Lowell Publishing Co. | 4/20/2012 | 10 |
| | Konarka Technologies Inc. | 5/25/2012 | 80 |
| | U Mass Lowell | 5/30/2012 | 6 |
| | Casey Family Services | 1/31/2013 | 20 |
| | Tewksbury | Tewksbury Hospital | 6/30/2010 |
| Lowell Community Health | | 12/31/2010 | 40 |
| Veeco Solar Equip. | | 9/27/2011 | 56 |
| Sears Essential | | 10/28/2011 | 17 |
| CompuCom | | 11/13/2012 | 55 |

Table 6 (Continued): Layoffs in the Greater Lowell Region: July 1, 2009 – January 31, 2013

| Community | Company | Effective Date | Employees Affected |
|------------------------------|--------------------------------|----------------------------------|--------------------|
| Westford | Sonus Networks Inc. | 8/31/2009 | 40 |
| | AECOM | 12/31/2009 | 30 |
| | Mack Technologies | 1/9/2012 | 25 |
| | Courier Westford | 4/13/2012 | 28 |
| | Infinite Convergence Solutions | 7/15/2012 | 10 |
| Greater Lowell Region | Total Layoffs | July 2009 – January, 2013 | 1,954 |

Source: Massachusetts Rapid Response Team

5. Businesses Creation

The Business Creation section focuses on the total number of establishments, the size of these establishments in terms of monthly employment numbers, the average weekly wages by industry and the major employers in the region.

a. Total Number of Establishments

Employment and wages data (shown in Table 7) provided by the Executive Office of Labor and Workforce Development shows that much of the business growth in the region has continued to occur in the City of Lowell. Overall, the region gained 296 establishments between June 2011 and June 2013, with 298 new establishments being created in Lowell.

The total number of businesses in Greater Lowell increased between 2011 and 2012 and the area’s educated workforce continues to attract hi-tech employers to the region. In 2012, open-source enterprise software maker Red Hat Inc. started construction on a new building which will more than double the size of the company’s presence in Massachusetts. John Flanagan, the company’s senior director of Westford corporate citizenship stated, “We really wanted to build a base here and tap into the historical talent” from technology firms like Prime, Wang and Digital, as well as colleges like MIT. He said that the area around Westford along Route 495 has become popular with several large technology firms. “It’s the new 128,” he said.

Source: Boston Business Journal 4.5.12

Table 7: Establishments and Employment for the Greater Lowell Region June 2011 – June 2013

| Community | Number of Establishments | | Change | | Average Monthly Employment | | Change | |
|------------------------------|--------------------------|--------------|------------|------------|----------------------------|----------------|--------------|-------------|
| | 2011 (Q2) | 2013 (Q2) | Net | % | 2011(Q2) | 2013 (Q2) | Net | % |
| Billerica | 1,203 | 1,197 | -6 | -0.5 | 20,432 | 21,689 | 1,257 | 6.2% |
| Chelmsford | 1,161 | 1,163 | 2 | 0.2 | 21,519 | 21,769 | 250 | 1.2% |
| Dracut | 616 | 626 | 10 | 1.6 | 5,197 | 5,459 | 262 | 5.0% |
| Dunstable | 67 | 63 | -4 | -6.0 | 231 | 244 | 13 | 5.6% |
| Lowell | 2,142 | 2,440 | 298 | 13.9 | 34,157 | 34,598 | 441 | 1.3% |
| Pepperell | 256 | 250 | -6 | -2.3 | 1,446 | 1,521 | 75 | 5.2% |
| Tewksbury | 860 | 852 | -8 | -0.9 | 14,892 | 15,029 | 137 | 0.9% |
| Tyngsborough | 380 | 373 | -7 | -1.8 | 4,338 | 4,508 | 170 | 3.9% |
| Westford | 673 | 690 | 17 | 2.5 | 11,935 | 12,381 | 446 | 3.7% |
| Greater Lowell Region | 7,358 | 7,654 | 296 | 4.0 | 114,147 | 117,198 | 3,051 | 2.7% |
| Massachusetts | 223,245 | 225,995 | 2,750 | 1.23% | 3,208,699 | 3,314,420 | 105,721 | 3.3% |

Source: Executive Office of Labor and Workforce Development, ES-202 - 2011 and 2013 Second Quarter Reports

The number of businesses in the region increased from 7,358 in the second quarter of 2011 to 7,654 in the second quarter of 2013 for an overall decrease of 4%. Five of the nine communities experienced marginal declines in their total number of establishments between June 2011 and June 2013. These communities were Billerica (-0.5%), Dunstable (-6.0%), Pepperell (-2.3%), Tewksbury (-0.9%) and Tyngsborough (-1.8%). While Chelmsford added two establishments, Dracut expanded with ten new establishments and Westford added seventeen establishments. As mentioned previously, the City of Lowell added 298 businesses, which represented 13.9% growth in the number of establishments. This represents significant improvement from 2009 when a 2.2% decline in establishments was reported for the region.

b. Employment levels

Despite the decline in establishments in more than half of the region's communities, the Greater Lowell region's average monthly employment increased by 2.7% between June 2011 and June 2013. This indicates that 3,051 jobs were created in the region in this time period. Every community experienced an increase in average monthly employment numbers with Billerica gaining 1,257 jobs at the upper end and Dunstable gaining 13 jobs at the lower end. This increase is, in large part, due to business growth across the region that has led to increased employment numbers.

c. Employment Projections

Like the population projections, MassDOT developed updated employment projections for the Greater Lowell region (Table 8 below). MassDOT applied a "top-down" approach that utilizes employment projections for the state, as a whole, and then assigns shares of these figures to the MPO regions and individual communities within those regions. Based upon this approach, the employment projections at the state level are more accurate than those for the region or individual communities. Nevertheless, there is merit in understanding the projected employment numbers that have been calculated for the nine communities in the Greater Lowell region.

Table 8: Local and Regional Employment Projections: 2010-2035

| Community | 2010 | 2017 | 2020 | 2025 | 2030 | 2035 | % change 2010-2035 |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------------|
| Billerica | 20,583 | 22,310 | 22,620 | 22,590 | 22,810 | 22,810 | 10.8 |
| Chelmsford | 20,736 | 22,600 | 23,200 | 23,520 | 23,710 | 23,920 | 15.4 |
| Dracut | 4,826 | 5,470 | 5,720 | 5,970 | 6,210 | 6,420 | 33.0 |
| Dunstable | 255 | 310 | 320 | 350 | 360 | 390 | 52.9 |
| Lowell | 33,204 | 35,980 | 36,520 | 36,680 | 37,460 | 37,960 | 14.3 |
| Pepperell | 1,379 | 1,640 | 1,750 | 1,950 | 2,170 | 2,300 | 66.8 |
| Tewksbury | 15,213 | 16,750 | 17,190 | 17,610 | 18,050 | 18,400 | 20.9 |
| Tyngsborough | 4,123 | 4,810 | 5,040 | 5,160 | 5,380 | 5,650 | 37.0 |
| Westford | 11,681 | 13,130 | 13,640 | 14,170 | 14,850 | 15,150 | 29.7 |
| Greater Lowell Region | 112,000 | 123,000 | 126,000 | 128,000 | 131,000 | 133,000 | 18.8% |

Source: MassDOT in consultation with NMCOG

According to the previous figures in Table 8, MassDOT projected consistent steady employment growth over the next two decades, with overall employment growth anticipated to increase by 18.8% for the region. Employment levels in each community are also anticipated to increase, ranging from 10.8% in Billerica to 66.8% in Pepperell.

As previously described, the top-down approach to developing employment projections has some accuracy limitations. Table 9 below compares the actual annual employment numbers in each community for 2010 with the 2010 projections developed by MassDOT in consultation with NMCOG. The MassDOT 2010 projections are closest to the actual 2010 employment figures for Westford, Tewksbury, Lowell and Dracut. In all other instances, the differences are slightly more pronounced. Overall, the MassDOT projections for the region fall short of the actual annual 2010 employment number by only 0.5%. These slight discrepancies may be partly due to declining employment resulting from the national recession and the beginnings of recovery.

Table 9: Comparison of Actual and Projected Employment Numbers

| Community | 2010 Actual | 2010 Projection | Difference |
|------------------------------|----------------|-----------------|--------------|
| Billerica | 19,929 | 20,583 | 3.2% |
| Chelmsford | 21,415 | 20,736 | -3.3% |
| Dracut | 4,911 | 4,826 | -1.8% |
| Dunstable | 241 | 255 | 5.5% |
| Lowell | 33,670 | 33,204 | -1.4% |
| Pepperell | 1,413 | 1,379 | -2.5% |
| Tewksbury | 15,088 | 15,213 | 0.8% |
| Tyngsborough | 4,231 | 4,123 | -2.6% |
| Westford | 11,716 | 11,681 | -0.3% |
| Greater Lowell Region | 112,614 | 112,000 | -0.5% |

Source: Massachusetts Executive Office of Labor and Workforce ES-202 2010 Annual Reports; Projections by MassDOT in consultation with NMCOG

c. Average Weekly Wages

While the number of jobs created is important, so too is the quality of the job in terms of paid wages. The average weekly wage of workers in the Greater Lowell region is therefore an important measure of the State of the Economy. As shown in Table 10 on the next page, the region's estimated average weekly wage decreased by \$20 or 1.7% between June 2011 and June 2013. At the state level, the average weekly wage increased by 0.8%. The region's communities experienced mixed results – Pepperell had the lowest starting wage in the second quarter of 2011 and experienced the largest increase in average weekly wages (16%), while the average weekly wages in Billerica (-5.3%), Lowell (-2.7%), and Westford (-3.1%) decreased. Average weekly wages also increased in Chelmsford (0.6%), Dracut (4.6%), Dunstable (9.1%), Tewksbury (0.1%) and Tyngsborough (1.8%).

Table 10: Average Weekly Wage for the Greater Lowell Region (June 2011 – June 2013)

| Community | Average Weekly Wages | | Change | |
|------------------------------|----------------------|----------------|--------------|--------------|
| | 2011 (Q2) | 2013 (Q2) | Net | % |
| Billerica | \$1,368 | \$1,296 | -\$72 | -5.3% |
| Chelmsford | \$1,212 | \$1,219 | \$7 | 0.6% |
| Dracut | \$736 | \$770 | \$34 | 4.6% |
| Dunstable | \$773 | \$843 | \$70 | 9.1% |
| Lowell | \$1,021 | \$993 | -\$28 | -2.7% |
| Pepperell | \$698 | \$810 | \$112 | 16.0% |
| Tewksbury | \$1,301 | \$1,302 | \$1 | 0.1% |
| Tyngsborough | \$887 | \$903 | \$16 | 1.8% |
| Westford | \$1,474 | \$1,429 | -\$45 | -3.1% |
| Greater Lowell Region | \$1,180 | \$1,160 | -\$20 | -1.7% |
| Massachusetts | \$1,122 | \$1,131 | \$9 | 0.8% |

Source: Executive Office of Labor and Workforce Development, ES-202, 2011 and 2013 Second Quarter Reports.

d. Industry Composition

The transformation of the Greater Lowell region’s economy to a more service–based economy has continued since the *Greater Lowell CEDS for 2009-2013* was published in 2009. In analyzing the industry composition for the Greater Lowell region, data provided by the Executive Office of Labor and Workforce Development for the Greater Lowell Workforce Investment Area (WIA) and Pepperell has been used in Table 11 on the following page.

As of the second quarter of 2013, the region consisted primarily of industries in the service-providing domain. The total number of service-providing establishments has increased to 6,318, which represents 6.4% growth since 2011, as well as a 17.5% growth since 2009 when there were 5,377 service-providing establishments.

Between June 2011 and June 2013 the number of establishments in the goods-producing domain declined by 6.0% or 85 establishments. As of the June 2013, service-providing industries outnumbered goods-producing industries by nearly 5 to 1. This shows the continuing growth of the region’s service-based economy, which had also been described in the Five-Year CEDS. Every industry sector in the goods-producing domain, with the exception of Natural Resources and Mining, declined between the second quarter of 2011 and the second quarter of 2013. The construction sector was most impacted with a 7.8% reduction in the number of establishments in the region.



Source: NMCOG

The greatest growth in establishments has occurred in the Education and Health Services sector, which increased by 154.9%. According to the Executive Office of Labor and Workforce Development, the majority of this growth has occurred in the Healthcare and Social Assistance subsector. The Public Administration sector also experienced growth of 15.4% in the number of establishments, while the Natural Resources and Mining Industry grew by four establishments resulting in 36.4% growth due to low base figures. There was modest growth of 1.2% in the Leisure and Hospitality sector and 1.0% in Professional and Business Services. Several individual service-providing sectors experienced a decrease in the number of establishments across the region between June 2011 and June 2013. The Other Services sector, which includes activities such as machinery repairs, religious activities, advocacy, dry-cleaning and laundry services and personal care services, has seen the greatest decrease in establishments with a decline of 53.2%. There were also minor declines in Financial Activities, and Trade, Transportation and Utilities. These declines have been marginal reflecting little change since June 2011.

Table 11: Industry Composition of the Greater Lowell Region: 2011 (Q2) to 2013 (Q2)

| Description | No. of Establishments | | % Change between 2011 (Q2) – 2013 (Q2) | Average Monthly Employment | | % Change between 2011 (Q2) – 2013 (Q2) | Average Weekly Wages | | % Change between 2011(Q2) – 2013(Q2) |
|--|-----------------------|--------------|--|----------------------------|----------------|--|----------------------|----------------|--------------------------------------|
| | 2011(Q2) | 2013(Q2) | | 2011 (Q2) | 2013 (Q2) | | 2011(Q2) | 2013 (Q2) | |
| Goods-Producing Domain | 1,421 | 1,336 | -6.0 | 23,170 | 24,219 | 4.5 | \$1,601 | \$1,583 | -1.1 |
| Natural Resources and Mining (incl. Agriculture, fishing) | 11 | 15 | 36.4 | 68 | 91 | 33.8 | \$441 | \$379 | -13.9 |
| Construction | 1026 | 946 | -7.8 | 6,366 | 7,152 | 12.3 | \$949 | \$1,019 | 7.4 |
| Manufacturing | 382 | 375 | -1.8 | 16,724 | 16,976 | 1.5 | \$1,810 | \$1,828 | 1.0 |
| Service-Providing Domain | 5,937 | 6,318 | 6.4 | 90,977 | 92,979 | 2.2 | \$1,082 | \$1,050 | -2.9 |
| Trade, Transportation and Utilities (includes wholesale, retail trade) | 1,292 | 1,286 | -0.5 | 19,882 | 20,809 | 4.7 | \$830 | \$813 | -2.1 |
| Information | 121 | 126 | 4.1 | 4,750 | 3,632 | -23.5 | \$1,987 | \$1,730 | -12.9 |
| Financial Activities | 424 | 415 | -2.1 | 3,445 | 3,294 | -4.4 | \$1,175 | \$1,274 | 8.4 |
| Professional and Business Services | 1,268 | 1,281 | 1.0 | 18,883 | 18,586 | -1.6 | \$1,727 | \$1,690 | -2.1 |
| Education and Health Services | 698 | 1,779 | 154.9 | 25,653 | 27,732 | 8.1 | \$964 | \$980 | 1.6 |
| Leisure and Hospitality | 673 | 681 | 1.2 | 10,072 | 11,225 | 11.4 | \$330 | \$338 | 2.4 |
| Other Services , Excludes Public Admin | 1,364 | 639 | -53.2 | 4,445 | 3,621 | -18.5 | \$689 | \$796 | 15.5 |
| Public Administration | 91 | 105 | 15.4 | 3,787 | 4,015 | 6.0 | \$1,219 | \$1,221 | 0.1 |
| Total, All Industries | 7,358 | 7,654 | 4.0 | 114,147 | 117,198 | 2.7 | \$1,180 | \$1,160 | -1.7 |

Source: Executive Office of Labor and Workforce Development, ES-202, 2011 and 2013 Second Quarter Reports for Greater Lowell Work Investment Area and Pepperell

In terms of Average Monthly Employment, employment in the service-providing domain was almost four times greater than in the goods-producing domain. While there is a large difference in the average number of people employed in each domain, the goods-producing domain still managed a 4.5% increase in monthly employment levels. From the second quarter of 2011 to the second quarter of 2013 monthly employment in Construction grew by 12.3%, Manufacturing increased by 1.5% and Natural Resources and Mining increased by 33.8%.



Source: NMCOG

The Service-Providing domain added 2,002 jobs on average between June 2011 and June 2013, representing a 2.2% increase in average monthly employment levels. The greatest change in employment levels occurred in the Information sector, which declined by 23.5%, as well as the Other Services sector, which decreased by 18.5%. Growth in average monthly employment levels of the service-providing domain has occurred mostly in the Leisure and Hospitality, and Education and Health Services sectors.

Despite signs of business growth and higher employment levels generally across the region, the average weekly wage in the Greater Lowell region decreased from \$1,180 in the second quarter of 2011 to \$1,160 in the second quarter of 2013. Wages in the service-providing domain decreased by 2.9%, while those in the goods-producing domain decreased by 1.1%. All sectors of the goods-producing domain, except Natural Resources and Mining, experienced an increase in average weekly wages, while the service-providing domain varied across sectors. The Trade, Transportation and Utilities (-2.1%), Information (-12.9%), and Professional and Business Services (-2.1%) sectors experienced declines in average weekly wages. Increases in average weekly wages occurred in the Financial Activities (8.4%), Education and Health Services (1.6%), Leisure and Hospitality (2.4%), Other Services (15.5%), and Public Administration (0.1%) sectors.

In the second quarter of 2013, the highest weekly wages were paid in Manufacturing (\$1,828), Information (\$1,730), and Professional and Business Services Sectors (\$1,690), as shown in Table 11 on the previous page. This is consistent with information provided in the *Greater Lowell CEDS for 2009-2013*, which found that most of the higher paying jobs in the region fell into the ‘knowledge economy’ sector. It should be noted that, other than the manufacturing sector, these sectors have experienced a decline in employment levels between 2011 and June 2013.



Source: NMCOG

e. Major Employers

The Greater Lowell region is known for its innovative, high-tech industries and businesses, including those in manufacturing, research and development, and information services. Based upon information provided by the Executive Office of Labor and Workforce Development, the major employers for 2013 are identified below in Table 12. This table is ordered by size then alphabetically within the size range. The major employers in 2009, as identified in the *Greater Lowell CEDS for 2009-2013*, are also shown.

Table 12: Major Employers in the Greater Lowell Region 2009 and 2013

| 2009 Major Employers | Estimated No of Employees | 2013 Major Employers | Estimated Number of Employees |
|---|---------------------------|-------------------------------------|-------------------------------|
| Raytheon | 8,000 | Kronos Inc. | 1,000 - 4,999 |
| DeMoulas Supermarkets | 5,500 | Lowell General | 1,000-4,999 |
| Lahey Clinic | 5,202 | Lowell General Hospital | 1,000 - 4,999 |
| BAE Systems | 5,000 | Maine Central Railroad Co. | 1,000 - 4,999 |
| IBM, Inc. | 3,400 | Saints Medical Centre | 1,000 - 4,999 |
| Mitre Corp. | 2,080 | Tewksbury Hospital | 1,000 - 4,999 |
| Lowell General Hospital | 2,017 | UMass Lowell | 1,000 - 4,999 |
| United Parcel Service, Inc | 2,000 | Community Teamwork Inc. | 500 - 999 |
| Teradyne, Inc. | 1,500 | Du Pont Pharmaceuticals Co. | 500 - 999 |
| Verizon Communications | 1,500 | Dunkin Donuts Management Office | 500 - 999 |
| Analog Devices, Inc. | 1,400 | EMD Millipore Corp. | 500 - 999 |
| Hannaford Bros. | 1,400 | Entegris Inc. | 500 - 999 |
| Walmart Stores, Inc. | 1,350 | Interstate Electrical Service Corp. | 500 - 999 |
| The Home Depot, Inc. | 1,350 | Juniper Networks | 500 - 999 |
| Cisco Systems | 1,300 | Lantheus Medical Imaging Inc. | 500 - 999 |
| Sun Micro Systems | 1,300 | M/A-Com Technology Solutions | 500 - 999 |
| Emerson Hospital | 1,171 | Mercury Systems Inc. | 500 - 999 |
| Saints Medical Center | 1,000 | Met Life | 500 - 999 |
| Kronos, Inc. | 1,000 | Middlesex Community College | 500 - 999 |
| Millipore Corporation | 1,000 | Middlesex County Jail | 500 - 999 |
| | | Natures Jewelry | 500 - 999 |
| | | Peace Plus Maintenance | 500 - 999 |
| | | Potpourri Group Inc. | 500 - 999 |
| | | Red Hat | 500 - 999 |
| <p>Source: Executive Office of Labor and Workforce Development for the Greater Lowell Workforce Investment Area plus separate data for the Town of Pepperell and the City of Lowell http://www.lowellma.gov/dpd/economic/Pages/General/Employers.aspx.</p> | | | |

The difference in major employers is largely due to the different data sources. In 2009 the *Lowell Sun* published a March supplement that highlighted the major employers in the region. Two years ago, the *Sun* discontinued publishing this supplement. For the 2013 major employers, the listing provided by the Executive Office of Labor and Workforce Development (Infogroup) was utilized, which lists ranges of employment for companies within each community. Therefore, the DeMoulas warehouse is listed within the Town of Tewksbury and the Market Baskets throughout the region are not combined in terms of total employment. Some additional information has been sourced from the City of Lowell from their list of top employers, however a methodology for identifying major employers in the region is needed.

6. Current Tax Rates

The setting of local property tax rates can provide a balance between the property tax levied homeowners and the taxes provided by the business community. From 2009 to 2013, residential, commercial, industrial and personal property tax rates have increased across the board in all communities except the City of Lowell. While the City of Lowell has increased the residential tax rate by 29%, from \$11.68 to \$15.01, the commercial, industrial and personal property rates have increased by approximately 47% from \$23.76 in 2009 to \$31.32 in 2013. Outlined in Table 13 below are the FY 2013 tax rates for the communities in the Greater Lowell region.

Table 13: Fiscal Year 2013 Tax Rates by Class for the Greater Lowell Region

| Community | Residential | Commercial | Industrial | Personal Property |
|--|-------------|------------|------------|-------------------|
| Billerica | \$14.31 | \$32.89 | \$32.89 | \$32.89 |
| Chelmsford | \$17.95 | \$17.95 | \$17.95 | \$17.95 |
| Dracut | \$13.79 | \$13.79 | \$13.79 | \$13.79 |
| Dunstable | \$15.53 | \$15.53 | \$15.53 | \$15.53 |
| Lowell | \$15.01 | \$31.32 | \$31.32 | \$31.32 |
| Pepperell | \$14.78 | \$14.78 | \$14.78 | \$14.78 |
| Tewksbury | \$15.44 | \$25.60 | \$25.60 | \$25.60 |
| Tyngsborough | \$16.19 | \$16.19 | \$16.19 | \$16.19 |
| Westford | \$16.13 | \$16.38 | \$16.38 | \$16.13 |
| <i>Rate per \$1,000 evaluation</i> | | | | |
| <i>Source: Mass. Department of Revenue, Division of Local Services, 2013</i> | | | | |

7. Housing Market

The cost and availability of housing in the Greater Lowell region remains an important factor of economic growth. Since the publication of the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*, the housing sector has undergone significant change and now appears to be improving, depending on the market and community. Between July 2011 and June 2013, the number of homes sold in the region increased and the cost of housing began to increase, despite a drop in 2012, as the economy recovers from the national recession. Foreclosure petitions in the region have also decreased. While the number of housing units built for low- to moderate-income families under Chapter 40B has increased, there are still gaps in the levels of supply of affordable housing in a number of communities.

a. Household projections

Following the release of the 2010 U.S. Census data, MassDOT updated its household projections for the Greater Lowell region. The U.S. Census defines households as being equivalent to “occupied housing units.” According to the MassDOT projections, the number of households in the Greater Lowell region will increase by 14.3%, from 104,022 in 2010 to 118,900 in 2035.

Based upon these projections, the number of households in each community within the region will also grow. Lowell's regional share of households will be reduced from 38.1% in 2010 to 34.2% in 2035. Billerica and Chelmsford will also experience a decreasing share of households within the region, while the remaining communities will gain a greater share of households. Summarized in Table 14 below are the household projections for the Greater Lowell region.

Table 14: Household Projections for the Greater Lowell Region 2010-2035

| Community | 2010 | 2017 | 2020 | 2025 | 2030 | 2035 | Change between 2010-2035 | |
|------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------------------|-------------|
| | | | | | | | Net | % |
| Billerica | 14,034 | 14,200 | 14,350 | 14,700 | 14,950 | 15,250 | 1,216 | 8.7 |
| Chelmsford | 13,313 | 13,650 | 13,900 | 14,180 | 14,550 | 14,850 | 1,537 | 11.5 |
| Dracut | 10,956 | 11,580 | 12,000 | 12,490 | 13,150 | 13,770 | 2,814 | 25.7 |
| Dunstable | 1,063 | 1,190 | 1,210 | 1,350 | 1,500 | 1,650 | 587 | 55.2 |
| Lowell | 38,470 | 38,530 | 38,650 | 39,370 | 39,920 | 40,650 | 2,180 | 5.7 |
| Pepperell | 4,197 | 4,660 | 4,850 | 5,130 | 5,500 | 5,800 | 1,603 | 38.2 |
| Tewksbury | 10,492 | 10,800 | 10,980 | 11,450 | 11,800 | 12,150 | 1,658 | 15.8 |
| Tyngsborough | 3,999 | 4,370 | 4,550 | 4,800 | 5,080 | 5,350 | 1,351 | 33.8 |
| Westford | 7,498 | 8,020 | 8,310 | 8,630 | 9,050 | 9,430 | 1,932 | 25.8 |
| Greater Lowell Region | 104,022 | 107,000 | 108,800 | 112,100 | 115,500 | 118,900 | 14,878 | 14.3 |

Source: U. S. Census Bureau, 2010 Census and MassDOT in consultation with NMCOG

In analyzing the household projection data, the largest household growth is anticipated to occur in Dracut, Dunstable, Pepperell, Tyngsborough and Westford. Notably, it is forecast that Dracut will grow by 2,814 households, the largest increase forecast for the region.

b. Affordable Housing

The Greater Lowell region has shown progress towards addressing the affordable housing needs in each community. The number of subsidized housing units provided across the region grew by 325 units from the 2009 levels reported in the Five-Year CEDS. However, the proportion of subsidized housing units declined from 9.3% to 8.9% of the region's year-round housing, due to the increase in year-round housing units between the 2000 and 2010 U.S. Census. As of April 2013, the Greater Lowell region's subsidized housing inventory reached 9,726 units, which represented a 0.3% increase in the number of subsidized units provided across the region from July 2011 to April 2013.

Table 15: Subsidized Housing Units in the Greater Lowell Region (June 2011-April 2013)

| Community | 2010 Census Year-Round Units | Chap. 40B Units (As of 7/11) | Chap. 40B Units (As of 4/13) | Percent of Chap. 40B Units (As of 4/13) |
|------------------------------|------------------------------|------------------------------|------------------------------|---|
| Billerica | 14,442 | 1,186 | 842 | 5.8% |
| Chelmsford | 13,741 | 966 | 990 | 7.2% |
| Dracut | 11,318 | 595 | 660 | 5.8% |
| Dunstable | 1,085 | 0 | 0 | 0.0% |
| Lowell | 41,308 | 5,212 | 5,220 | 12.6% |
| Pepperell | 4,355 | 122 | 130 | 3.0% |
| Tewksbury | 10,803 | 967 | 1,011 | 9.4% |
| Tyngsborough | 4,166 | 278 | 320 | 7.7% |
| Westford | 7,671 | 371 | 553 | 7.2% |
| Greater Lowell Region | 108,889 | 9,697 | 9,726 | 8.9% |

Source: Executive Office of Housing and Community Development

The City of Lowell continues to maintain the highest proportion of subsidized housing units in the region, far exceeding the Chapter 40B requirements. More than half of the Greater Lowell region's subsidized housing inventory is located in Lowell. Since the *Greater Lowell CEDS for 2009-2013* was written, several communities have increased their supply of subsidized housing resulting in a reduced regional share for the City. Most notably, Tewksbury has almost doubled its subsidized housing inventory. Tyngsborough has also seen growth in the number of subsidized housing units.

c. Trends in the Regional Housing Market

The Massachusetts housing market has changed significantly during the past two years. According to the Warren Group, Massachusetts is in the second year of a housing recovery, which began in 2012 as reflected by a sharp increase in sales and modest growth in sales prices. In the first half of 2013, a total of 21,659 single-family homes were sold in Massachusetts, compared to 21,633 during the same period a year ago. The median sale price of single-family homes in the first half of 2013 rose more than 12 percent to \$315,000, up from \$281,000 during the same period in 2012. The number of foreclosure petitions has also been reduced across the state. From January through June 2013, 2,943 foreclosure petitions were filed statewide, down almost 69 % from 9,425 during the same period in 2012.

The Greater Lowell region was once a thriving manufacturing and industrial center. Over the decades, the region's economy has largely transformed from being industry and manufacturing-centered to service-oriented. Public officials and the private sector have been working to adaptively reuse many of the former mills and factories in the region, Appleton Mills is the latest example of a revitalized textile mill. It is now home to artists and others who want affordable living in the city of Lowell.



i. Number of Sales

As of June 2013, the housing market in the Greater Lowell region appears to be on a path to recovery. According to the Warren Group, the number of single-family home sales in the region increased by 22% from 1,634 in 2011 to 1,990 homes in 2012. This figure exceeds the 2007 levels of 1,783 single-family home sales, and the 900 single-family home sales reported in the *Greater Lowell CEDS for 2009-2013* at the height of the housing crisis. This increase represents a 12% increase over the 2007 pre-recession figures and a 121% increase over 2009. Every community in the Greater Lowell region experienced growth in single-family homes sales between 2011 and 2012.

While the condominium market has also improved since 2009, nearly doubling in sales figures, it has not yet fully recovered to 2007 levels. Condo sales, in the region, increased by 27% from 659 in 2011 to 840 in 2012. This is nearly 38% below the 1,359 condo sales registered for 2007. Notwithstanding the slower growth in condo sales across the region, the 2012 data shows a marked improvement in sales numbers compared to the figures reported in the Five-Year CEDS. In 2009, only 464 condos were sold in the Greater Lowell region. All communities, except Chelmsford and Dracut, experienced growth in condominium sales between 2011 and 2012.

Due to a slower condo market, the overall sales numbers for all houses in the region has not returned to 2007 levels. Total housing sales increased from 2,929 in 2011 to 3,510 in 2012, or by 20% (581 units). In 2007, there were a total of 3,804 home sales in the Greater Lowell region. The limited data available for 2013 indicates that the upward swing in house sales is continuing and that pre-recession figures may likely be surpassed. Tables 16, 17 and 18 on the next two pages summarize the housing sales data for the region in 2011, 2012 and part of 2013.

Table 16: 2011 Housing Sales and Median Sales Prices in the Greater Lowell Region

| Community | 2011 Single Family Home Sales | 2011 Single Family Median Sales Prices | 2011 Condo Sales | 2011 Condo Median Sales Prices | All Housing Sales in 2011 | All Housing Median Sales Prices in 2011 |
|------------------------------|-------------------------------|--|------------------|--------------------------------|---------------------------|---|
| Billerica | 254 | \$286,250 | 40 | \$232,950 | 346 | \$279,600 |
| Chelmsford | 259 | \$311,900 | 113 | \$195,000 | 415 | \$275,500 |
| Dracut | 204 | \$223,000 | 71 | \$148,900 | 335 | \$210,000 |
| Dunstable | 20 | \$396,250 | 0 | 0 | 27 | \$340,000 |
| Lowell | 410 | \$182,750 | 221 | \$115,000 | 939 | \$165,000 |
| Pepperell | 66 | \$278,000 | 7 | \$97,000 | 93 | \$255,000 |
| Tewksbury | 196 | \$295,450 | 83 | \$229,000 | 327 | \$275,000 |
| Tyngsborough | 76 | \$295,000 | 51 | \$209,900 | 150 | \$263,750 |
| Westford | 171 | \$435,000 | 73 | \$280,000 | 297 | \$375,000 |
| Greater Lowell region | 1,656 | \$295,000 (estimate) | 659 | \$195,000 (estimate) | 2,929 | \$275,000 (estimate) |

Source: The Warren Group

Table 17: 2012 Housing Sales and Median Sales Prices in the Greater Lowell Region

| Community | 2012 Single Family Home Sales | 2012 Single Family Median Sales Prices | 2012 Condo Sales | 2012 Condo Median Sales Prices | All Housing Sales in 2012 | All Housing Median Sales Prices in 2012 |
|------------------------------|-------------------------------|--|------------------|--------------------------------|---------------------------|---|
| Billerica | 347 | \$303,000 | 66 | \$226,660 | 491 | \$296,500 |
| Chelmsford | 312 | \$315,000 | 106 | \$178,625 | 467 | \$280,000 |
| Dracut | 238 | \$230,000 | 113 | \$135,000 | 426 | \$210,500 |
| Dunstable | 32 | \$406,469 | 0 | 0 | 36 | \$400,450 |
| Lowell | 417 | \$185,000 | 234 | \$120,647 | 944 | \$167,950 |
| Pepperell | 89 | \$241,000 | 13 | \$125,100 | 130 | \$222,550 |
| Tewksbury | 254 | \$292,500 | 139 | \$225,000 | 452 | \$275,500 |
| Tyngsborough | 89 | \$285,000 | 54 | \$172,500 | 175 | \$235,000 |
| Westford | 212 | \$433,250 | 115 | \$280,000 | 389 | \$382,500 |
| Greater Lowell region | 1,990 | \$292,500 (estimate) | 840 | \$172,500 (estimate) | 3,510 | \$275,500 (estimate) |

Source: The Warren Group

Table 18: Housing Sales and Median Sales Prices in the Greater Lowell Region (Jan-April, 2013)

| Community | 2013 Single Family Home Sales | 2013 Single Family Median Sales Prices | 2013 Condo Sales | 2013 Condo Median Sales Prices | All Housing Sales in 2013 | All Housing Median Sales Prices in 2013 |
|------------------------------|-------------------------------|--|------------------|--------------------------------|---------------------------|---|
| Billerica | 71 | \$307,000 | 20 | \$264,000 | 116 | \$299,900 |
| Chelmsford | 80 | \$321,150 | 38 | \$180,000 | 129 | \$286,000 |
| Dracut | 55 | \$262,500 | 22 | \$137,500 | 97 | \$227,500 |
| Dunstable | 7 | \$395,900 | 0 | 0 | 36 | \$395,900 |
| Lowell | 111 | \$210,000 | 71 | \$147,400 | 271 | \$189,900 |
| Pepperell | 34 | \$282,500 | 5 | \$249,900 | 48 | \$249,950 |
| Tewksbury | 67 | \$308,000 | 35 | \$230,000 | 119 | \$282,000 |
| Tyngsborough | 28 | \$346,750 | 17 | \$161,000 | 48 | \$264,750 |
| Westford | 56 | \$417,300 | 33 | \$312,675 | 98 | \$381,000 |
| Greater Lowell region | 509 | \$308,000 (estimate) | 241 | \$180,000 (estimate) | 962 | \$282,000 (estimate) |

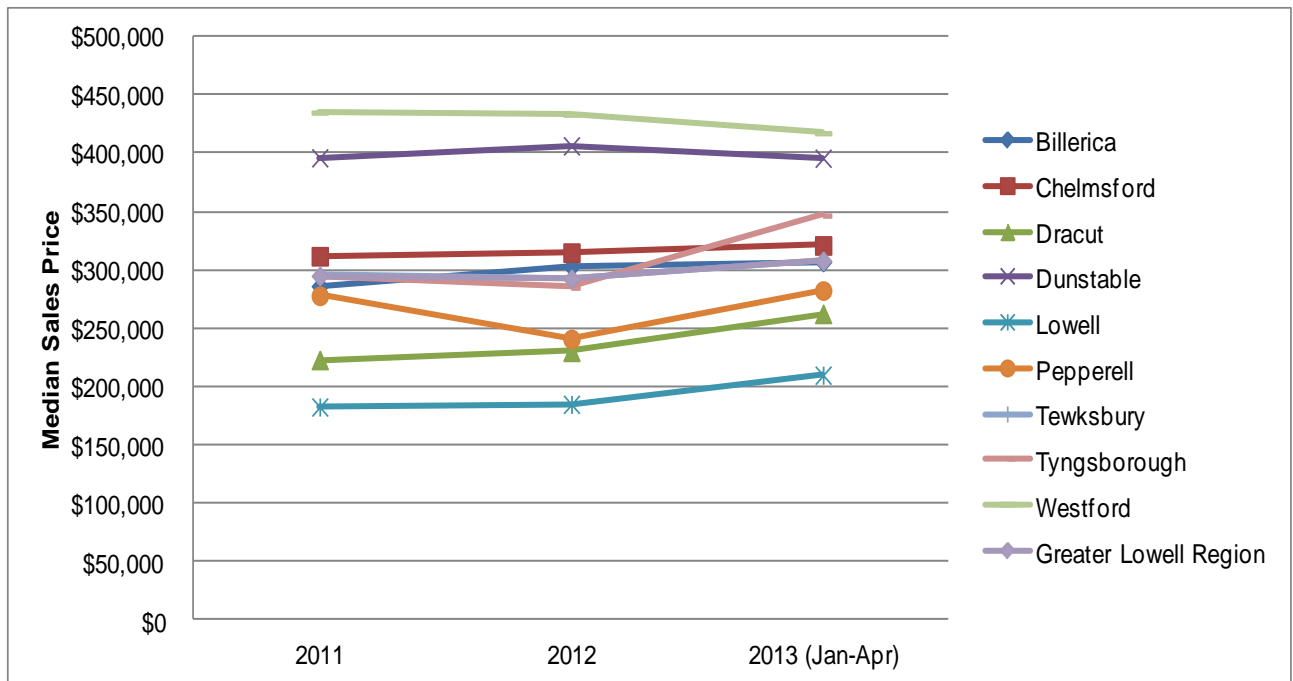
Source: The Warren Group

ii. Median Sale Prices

As shown in Figures 3 and 4 on the following page, the median sales price for both single-family homes and condos appears to be increasing as of April 2013, after marginally declining in 2012. The median sales price for single family homes decreased by 0.8% from \$295,000 in 2011 to \$292,500 in 2012. The median sales price for condos also decreased from \$195,000 in 2011 to \$172,500 in 2012, or by 12%.

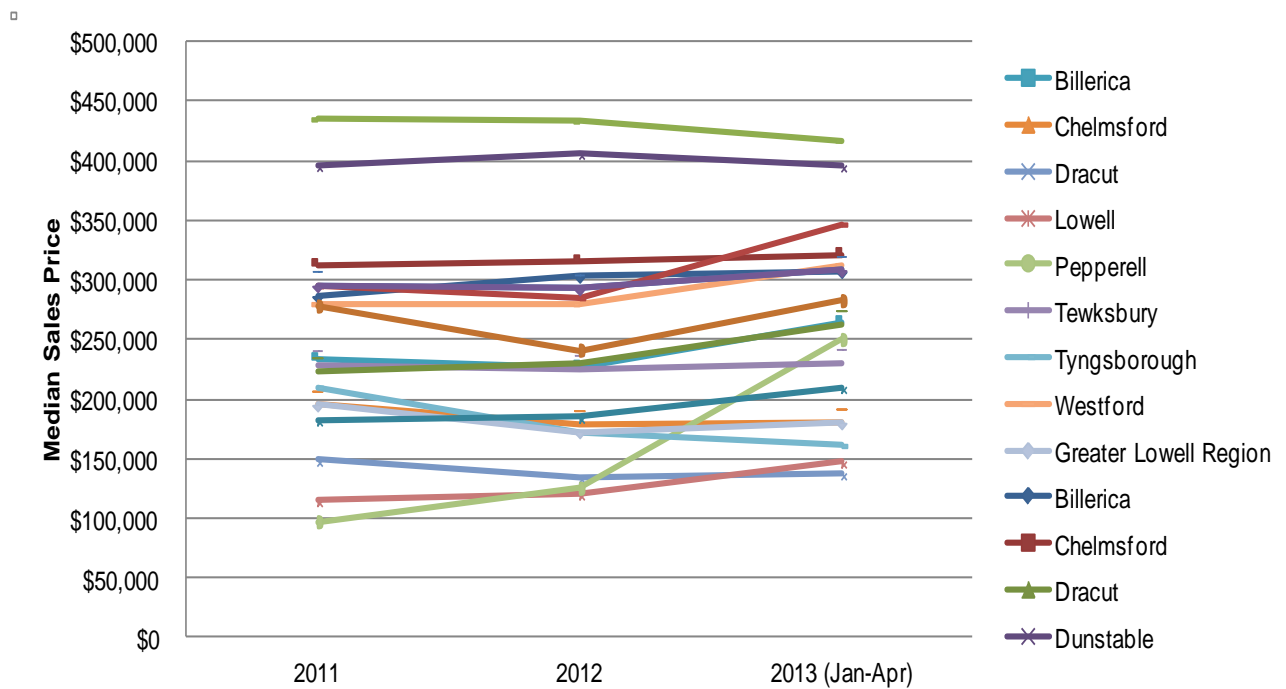
While data for 2013 is limited to four months (January - April), there are indications of an upward trend in sale prices with median prices for single family homes increasing by 5%, from \$292,500 in 2012 to \$308,000 in 2013. Every community, except for Dunstable and Westford, has seen an increase in the median selling price of single-family homes. Similarly, the median sales price for condos has also increased by 4%, from \$172,500 in 2012 to \$180,000 in 2013. In every community, except for Tyngsborough, condo prices have increased since 2012. Overall, it is estimated that the median sale price for all homes increased by 2.4% from \$275,500 in 2012 to \$282,000 in 2013, as shown in Table 19 above.

Figure 3: Median Sale Price for Single-Family Homes (2011-April 2013)



Source: The Warren Group

Figure 4: Median Sale Price for Condos (2011-April 2013)



Source: The Warren Group

The following table provides a comparison of home sales numbers and median sales prices for the Greater Lowell region in 2007, 2010-2012 and 2013 (January to April).

Table 19: Housing Sales and Median Sales Prices Comparison for the Greater Lowell Region

| Greater Lowell Region | Single Family Home Sales | Single Family Home Median Sales Prices | Condo Sales | Condo Median Sales Prices | All Housing Sales | All Housing Median Sales Prices |
|-----------------------|--------------------------|--|-------------|---------------------------|-------------------|---------------------------------|
| 2007 | 1,783 | \$337,324 (estimate) | 1,359 | \$200,740 (estimate) | 3,804 | \$289,175 (estimate) |
| 2010 | 1,643 | \$292,535 (estimate) | 809 | \$177,673 (estimate) | 3,077 | \$253,952 (estimate) |
| 2011 | 1,634 | \$295,000 (estimate) | 659 | \$195,000 (estimate) | 2,929 | \$275,000 (estimate) |
| 2012 | 1,990 | \$292,500 (estimate) | 840 | \$172,500 (estimate) | 3,510 | \$275,500 (estimate) |
| 2013 (Jan-Apr) | 509 | \$308,000 (estimate) | 241 | \$180,000 (estimate) | 962 | \$282,000 (estimate) |

Source: The Warren Group

iii. Foreclosures

Through information provided by the Warren Group, foreclosure petition data for 2010 through to March 2012 are summarized below in Table 20. The number of foreclosure petitions in the region decreased from 1,143 in 2010 to 556 in 2011, or by 51%. Based on figures for the first three months of 2012, however, the number of foreclosure petitions for 2012 appears to be on track to exceed 2011 levels. While the City of Lowell has overwhelmingly accounted for the largest number of foreclosure petitions from 2010 through March 2012, the City's share during this period decreased slightly as suburban communities experienced marginal increases.

Table 20: Foreclosure petitions in the Greater Lowell Region (2010 to March 2012)

| Community | 2010 Number of Records | 2010 Percent of Region | 2011 Number of Records | 2011 Percent of Region | Jan – Mar 2012 Number of Records | Jan – Mar 2012 Percent of Region |
|------------------------------|------------------------|------------------------|------------------------|------------------------|----------------------------------|----------------------------------|
| Billerica | 149 | 13.0 | 80 | 14.4 | 24 | 12.0 |
| Chelmsford | 85 | 7.4 | 55 | 9.9 | 23 | 11.5 |
| Dracut | 143 | 12.5 | 63 | 11.3 | 27 | 13.5 |
| Dunstable | 1 | 0.09 | 1 | 0.2 | 0 | 0 |
| Lowell | 514 | 45.0 | 233 | 41.9 | 82 | 41.0 |
| Pepperell | 46 | 4.0 | 24 | 4.3 | 8 | 4.0 |
| Tewksbury | 115 | 10.1 | 61 | 11.0 | 20 | 10.0 |
| Tyngsborough | 50 | 4.4 | 19 | 3.4 | 7 | 3.5 |
| Westford | 40 | 3.5 | 20 | 3.6 | 9 | 4.5 |
| Greater Lowell Region | 1,143 | 100.0 | 556 | 100.0% | 200 | 100.0 |

Source: The Warren Group

8. Summary

The Greater Lowell Economy is beginning to see the positive impacts of economic recovery. Over the past two years, there has been growth in employment levels and business establishments, and the unemployment rate has dropped. The housing market is also showing signs of resurgence with a reduced number of foreclosure petitions and growth in homes sales and sales prices, even though there has been slower growth in condominiums. Future population, household and employment growth throughout the region is also expected to be steady over the next 25 years.

Despite these positive signs, the unemployment rate in the City of Lowell still exceeds national and state unemployment rates and per capita income levels in parts of the City are less than the nation. Housing affordability within the region is also still a concern with the level of subsidized housing in a number of communities falling short of the 10% goal established by Chapter 40B. In addition, while the Greater Lowell region has seen job growth, many of these jobs are in lower paid sectors, resulting in average weekly wages that have declined across the region.

B. CLEAN ENERGY PLANNING ELEMENT

In Massachusetts, all fossil-fuels, including oil, natural gas and coal, are transported from other areas of the country or from other nations. Therefore, most monies spent on fossil fuel flow out of the state, providing little, if any, income to in-state workers or businesses. In 2008, an average Massachusetts household spent \$5,200 for energy costs – \$1,700 for heat, \$1,300 for electricity and \$2,200 for gasoline.¹ In addition, energy consumers have experienced wild price swings and long-term energy price increases.

Faced with rising costs, limited revenues and tight budgets, most municipalities have begun to explore opportunities that both reduce energy costs and generate revenues. Energy efficiency programs, building practices, land use policies, alternative fuel vehicles, and streamlined permitting practices will assist in achieving this objective. In addition, the use of renewable energy sources will help reduce greenhouse gas emissions, manage energy costs, and reduce reliance on fossil fuels, thereby contributing to a sustainable energy future for the region.



Source: Lowell Sun

Increased reliance on local energy sources such as solar, wind and geothermal energy would provide a buffer against the fluctuations in supplies and prices of traditional fossil fuel markets. In addition, increased use of renewable energy technologies along with a well-trained workforce of local installers and service contractors could help a clean energy sector emerge within the regional economy.

This section describes the current clean energy initiatives in Massachusetts, with a focus on legislation and state initiatives, solar energy, wind energy, regional renewable energy initiatives, Green Communities, green jobs and tools and incentives for renewable energy and energy conservation. This discussion is designed to showcase Massachusetts' diverse portfolio of policies and incentives to encourage job growth in the clean energy sector.

¹ Energy Price and Expenditure Estimates, 1970-2008, Massachusetts, U.S. Energy Information Administration

1. Legislation and State Initiatives

With the signing of the Green Communities Act, the Global Warming Solutions Act, and the Green Jobs Act in 2008, the Governor and the legislature established a comprehensive energy market policy for the Commonwealth, focusing on energy security, cleaner energy resources, and economic development benefits resulting from the transition to clean energy. The state level initiatives developed in response to these laws fall within one of four categories:

- Energy Efficiency;
- Renewable and Alternative Energy;
- Clean Energy Imports and Transmission; and
- Innovation and Sector Development.

Some of the most noteworthy initiatives set forth in the Green Communities Act include updates to the Renewable Energy Portfolio Standard (RPS) and the Alternative Portfolio Standard (APS), requirements for long-term contracts, improvements to the net-metering policy, and the requirement to adopt cost-effective energy efficiencies when it is cheaper than procuring new power. These initiatives are discussed in detail below.

a. Renewable Portfolio Standard (RPS)

The *Green Communities Act* sets an aggressive target for the amount of electricity generated by renewable and alternative energy sources. By mandating portfolio standards, the Green Communities Act requires retail sellers of electricity to buy a certain percentage of the electricity they sell to customers from clean energy technologies. The Green Communities Act increased the growth rate of the RPS, which was originally created in 1997, from one-half to one percent.

All retail sellers, competitive electricity suppliers, and utility companies currently meet this commitment by buying credits from the electricity generation sources. This accounting mechanism ensures that every unit of eligible electricity generated is only counted once, and it provides a price premium to power generation sources that may not yet be price competitive compared to fossil fuels. There are a number of eligible classes based on the technology and the date that the plant went into service. Class I renewable energy facilities began operation after 1997 and generate electricity using wind, solar, small hydro, eligible biomass or anaerobic digestion. The 2010 RPS requires that 5% of electricity supply come from Class I facilities, and that this target increase by one percent each year until reaching 15% in 2020. Class II facilities began operating prior to 1998, and these facilities would not continue operating were it not for the standard. The current RPS Class II requirements are 3.6% for renewable energy and 3.5% for waste energy. While these percentages do not increase annually, suppliers must comply with both renewable energy and waste energy requirements.

b. Alternative Portfolio Standard (APS)

The APS includes technologies such as combined heat and power, flywheel storage, paper-derived fuel cubes, coal gasification with permanent carbon sequestration, and energy efficient steam technology. The APS is an innovative initiative that has received national recognition and has enabled a number of large businesses to substantially reduce their energy costs by installing combined heat and power units at their sites. In 2009, the APS obligation for suppliers was 1%,

which is set to increase by 0.5% each year until 2014, when the growth rate will be reduced to 0.25% per year. After 2020, the minimum standard will continue to increase by 0.25% per year.²

c. Long-term Renewable Energy Contracts

In addition to the compliance percentages for the RPS and APS outlined above, the Green Communities Act requires that the Commonwealth's electric distribution utilities seek proposals from renewable energy projects in the state and in the region for long-term contracts of 10 to 15 years, in order to facilitate their financing and create jobs. Long-term contracts, or power purchase agreements (PPAs), have emerged as an important financing element for power plants, particularly in restructured electricity markets. Under this section of the law, National Grid has entered into PPAs with the first offshore wind farm that will be built in North America, Cape Wind. The Department of Public Utilities (DPU) reviewed and approved National Grid's Cape Wind contract in November 2010. According to the Massachusetts Department of Energy Resource (DOER), the contract will help National Grid comply with the state's renewable energy requirements, moderate the system peak load demand, enhance the electric reliability in the state and the region, and create jobs.

d. Net-Metering

The Green Communities Act also expanded the rights of customers who install small or community-scale solar and wind projects who want to sell excess electricity back to the distribution company, which is known as net-metering. The new rules require the meter to essentially run backwards, providing retail prices rather than wholesale prices for the excess generation. Net-metering facilitates the installation of local renewable energy projects by improving their economic viability. In Massachusetts, the net metering cap is currently set at 6% of a utility's peak load, with 3% allocated for public projects and 3% allocated for private projects. The Legislature also broadened the eligibility of government projects beyond those owned by a public entity and located on public land to include privately-owned installations on public or private land, as long as the electricity generated is purchased by the public entity.

Customers generating up to 60 kW or less of renewable energy are eligible for the state's net metering program. Any net energy generated by the qualifying facility during the course of a month will be credited at the average monthly market rate to the next month's bill. Distribution companies are prohibited from imposing special fees on net metering customers, such as backup charges and demand charges, additional controls, or liability insurance, as long as the generation facility meets the interconnection standards and all relevant safety and power quality connections.

² <http://www.mass.gov/eea/docs/doer/rps/rps-225-cmr16-mar-12-2009.pdf>

e. Cost-effective Energy Efficiencies

Under the Green Communities Act, electric and gas utilities are required to pursue all cost-effective energy efficiencies (*i.e.*, eliminating energy waste whenever it is cheaper to do so than buying additional supply). In the past, utility-operated energy efficiency programs funded by fixed charges on electric bills were limited in size and had to turn people away. Now every home and business in Massachusetts has been given the opportunity to participate in programs that save energy and money through the MassSave program.³ Furthermore, electric utilities are required to propose smart grid pilot programs in order to reduce peak and average loads by a minimum of five percent. A smart grid program would send automated information to customers showing how much energy they use and when. The utility would install smart meters, allowing consumers to make informed choices such as the best times to run certain appliances.

f. Massachusetts Clean Energy Center

The Green Jobs Act of 2008 created the Massachusetts Clean Energy Center (MassCEC) to accelerate job growth and economic development in the state's clean energy industry. MassCEC serves as a clearinghouse and support center for the clean energy sector, making direct investments in new and existing technologies, clean energy companies, and workforce development to meet the skill needs of the industry.

MassCEC receives funding from the Renewable Energy Trust Fund, which was created by the Massachusetts Legislature in 1998 as part of the deregulation of the electric utility market. The Trust Fund provides financial support for the development of renewable energy projects and is funded by a systems benefit charge paid by electric ratepayers of investor-owned utilities in Massachusetts, as well as municipal electric departments that have opted to participate in the program. The average residential ratepayer pays \$0.30 a month into the trust. With funds and programs to support clean energy development, entrepreneurship, workforce development and installation, MassCEC is a one-stop shop for the clean energy economy.

As a result of MassCEC's efforts, in partnership with local and international clean energy companies, the investment community, research institutions, workforce development organizations, and businesses and residents, Massachusetts has installed hundreds of megawatts of wind and solar systems across the Commonwealth. These projects have created jobs and resulted in local sources of renewable energy, which benefits the economy and helps to protect public health and the environment.

2. Solar Energy

Solar energy has long been recognized as one of the largest, most readily available renewable energy resources. Today, solar has the potential to be a leading renewable generation technology in Massachusetts, due to a variety of factors including a decrease in solar installation prices, and the state's commitment to move toward a cleaner electricity supply. Solar technologies are

³ Further discussion on the MassSave program is provided in Section H, which is entitled Tools and Incentives for Renewable Energy and Energy Conservation.

defined as those which convert sunlight into usable energy. This can be accomplished in two ways: solar photovoltaics (PV) and solar hot water. Solar PV generally consists of an array of solar panels, connected to a building's electrical system and/or the electrical grid. A solar hot water system uses the sun to heat air or water for a building's space and water heating needs. Solar hot water systems can be used for space heating and/or hot water heating at homes and businesses, thus reducing consumption of electricity, gas, or oil. In contrast to solar water heating, solar space heating usually requires a larger, more complicated system.

Solar PV and solar hot water systems are growing in popularity in Massachusetts, with support from MassCEC programs and incentives. A summary of these initiatives is provided below.

- *Commonwealth Solar* (CommSolar), which launched in 2008, introduced a simple rebate system that sharply reduced the cost of solar for commercial and residential consumers. The program is funded by \$68 million of existing renewable energy funds, and was institutionalized with the creation of CommSolar II. As of 2013, CommSolar has resulted in 103.2 MW of solar installations and has quadrupled the number of firms engaged in solar installation⁴. As a result, Massachusetts is in the midst of a 30-fold increase in installed solar power compared with four years ago. As this dramatic expansion of solar power takes place, Massachusetts is becoming one of the top solar markets in the country.
- The *Commonwealth Solar Hot Water Program* provides funding through a non-competitive application process for the installation of solar hot water (SHW) at residential, multi-family and commercial buildings. MassCEC's Renewable Energy Trust Fund has reserved \$1 million in funds to support the commercial one-year pilot program, and \$1 million in funds to support the residential one-year pilot program. The Commonwealth Solar Hot Water Residential Projects Database indicates that 360 SHW systems have been installed to date through this program.
- Solarize Massachusetts (SolarizeMass), a program initiated through MassCEC and the Green Communities Division of DOER encourages the adoption of small-scale solar PV projects by deploying a coordinated education, marketing and outreach effort, combined with a group purchasing model that provides increased savings as more people in the community commit to solar. The first two rounds of SolarizeMass have been very effective in helping drive down the installation cost of small-scale solar PV installations within the selected communities (Figure 1). According to MassCEC, the 2012 SolarizeMass Program resulted in more than 5,400 individuals expressing interest in pursuing solar electricity, and 748 residents and business owners in the 17 communities signing contracts to install over 4.8 MW of solar electricity capacity. In addition, the number of small-scale solar electricity projects in nearly every community will double as a direct result of the program.

⁴ MassCEC Commonwealth Solar Summary Report 2013

Figure 5: The Goals of the SolarizeMass Program

Source: MassCEC Solarize Mass Pilot Overview, February 2012

- *Model as-of Right Zoning Ordinance or Bylaw for Large-Scale Solar Facilities.* The Massachusetts Executive Office of Energy and Environmental Affairs (EOEEA) and DOER issued a model ordinance or bylaw that may be modified and adopted, as necessary, by local governments that want to promote wind-energy and solar development. The model ordinance incorporates “as-of-right siting,” which requires that so long as applicants follow local, state, and federal regulations, the project must be approved without seeking a local variance or special permit.
- *Solar Easements & Rights Law.* In addition, the Massachusetts General Laws include a Solar Easements & Rights Law (M.G.L. c. 40a §9B), which is designed to protect solar exposure and authorize zoning rules that prohibit unreasonable infringements on solar access. The statute also allows local zoning boards to issue permits creating solar rights. Furthermore, M.G.L. c. 40a §3 prohibits local governments from enacting local laws that “unreasonably regulate” solar energy systems.

3. Wind Energy

Large-scale wind energy developments are significant, energy-generating infrastructure projects, typically producing greater than 2 MW. As with most commercial-scale facilities, they are expensive to permit, design, and build and the power-generating equipment represent a large capital expense. Energy facility developers must invest substantial sums at the start of a project and recover those costs over time through the sale of electricity. In addition, revenue must cover the cost of lease payments for land, tax payments, and other economic benefits to the community in which the development is located. Factors such as the strength of the wind resource and cost of land in different locations also impact the economic viability of wind energy facilities. In New England, locations with appropriate wind conditions can be physically difficult to access, making the economic margins very tight.

Governor Patrick has set a goal of 2,000 MW of wind generated energy, enough to power 800,000 homes, by 2020. Much of that will come from offshore wind projects. Cape Wind will be the first offshore wind project in the country, and is expected to generate 468 MW. In addition, the first facility in the country capable of testing large-scale wind turbine blades, the Wind Technology Center located in Charlestown will bolster the state's emerging role as a center for renewable energy. According to MassCEC, 100 MW of wind energy generating capacity has been installed in Massachusetts to date.

One significant benefit of wind generated energy is an infusion of additional revenue to the host city or town, which can support municipal services or alleviate pressure on the property tax. The receipt of revenue can happen in one of two ways. A municipality may value and assess the wind power generating facility as it would any other real property, resulting in property taxes paid to the town. Alternatively, the municipality may institute payment-in-lieu-of-taxes (PILOT) agreements with energy facilities. The latter option may be preferable for both the developer and the municipality, as it will provide payment/revenue certainty and stability for both parties. Publicly-owned projects do not provide tax revenue, but the project is owned by the community, which can use the power generated to either offset municipal energy use or sell the power to create revenue. In Massachusetts, wind power generation creates Renewable Energy Certificates (RECs) in addition to electricity. These certificates can then be sold to utility companies to help them comply with their RPS obligations, thus creating additional revenue for the municipality.

Wind energy systems are one of the most cost-effective home-based renewable energy systems, and can lower a residential electric bill by 50%-90%, depending on available wind resources. Turbines used in residential applications typically range in size from 400 watts to 100 kW, with heights of around 50 to 100 ft. A typical home uses approximately 9,400 kilowatt-hours of electricity per year, so depending on the average wind speed in the area, a wind turbine with a capacity of 5 to 15 kW would be needed to contribute significantly to this demand. Small turbine costs can range from \$3,000 to \$35,000, depending on size, application, and service agreements with the manufacturer.⁵

A summary of MassCEC's wind energy incentives is provided below.

- The *Commonwealth Wind Incentive Program – Micro Wind Initiative* provides rebates for the installation of small wind projects with power capacities from 1 kW to 99 kW that are located at residential, commercial, industrial, institutional, and public facilities. The project site must be located in the territory of either a Massachusetts investor-owned electric distribution utility or a Municipal Light Plant Department that pays into the Massachusetts Renewable Energy Trust Fund. Applications are received on a rolling, first come first served basis. Through the Micro Wind Initiative, MassCEC has funded more than 70 small wind projects, more than 60 of which are now installed and operating.
- The *Commercial Wind Initiative Program* seeks to reduce the early stage risk associated with commercial wind development projects. It provides funding for site assessments, wind resource assessments, feasibility studies, and development activities including interconnection. The program does not provide funding for construction activities.

⁵ U.S. Department of Energy, *Small Wind Electric Systems: A U.S. Consumers Guide*. 2007.

MassCEC defines Commercial Wind projects as land-based projects that are greater than 2 MW and cannot be net metered. A project is defined as all of the unit(s) and the site at which the generating facility is located and the other assets, tangible and intangible, that compose the generating facility, for which a single set of permits is obtained. The wind project must have three turbines or more.

- The *Commonwealth Wind Community Scale Initiative* provides grants through a competitive application process for wind project installation by professional, licensed contractors at commercial, industrial, institutional, residential, and public facilities. The project must be served by a distribution utility that pays into the Massachusetts Renewable Energy Trust Fund administered by the MassCEC. The grants are based on the size and other characteristics of the Wind Project. MassCEC offers grant funding for the in-depth study of the feasibility, design and construction of eligible wind projects. MassCEC also offers site assessment grants of services to qualified public entities for high level reviews of potential sites. Site assessment applications are accepted on a rolling basis.

4. Renewable Energy Initiatives in the Northern Middlesex Region

In the Greater Lowell region, solar energy is the most prevalent source of renewable energy in use. Large and small scale solar generators are currently in place and others are being planned. Since 2010, solar projects have been completed at locations such as the Lowell Regional Transit Authority Maintenance Facility in Lowell, the Lowell Regional Wastewater Treatment Facility, United Teen Equality Center (UTEC) in Lowell, and the Stony Brook School in Westford. According to the DOER Solar Renewable Energy Credit (SREC) database, as of March 13, 2013 there are 342 solar installations across the region generating 19,9950 kW or 19.9 MW (Table 21).

There is the potential for additional solar projects at a number of locations throughout the region including capped landfills, and large commercial, industrial and institutional buildings with flat roofs, or south facing roofs. For example, there are also two solar farms projects currently underway. The Westford Solar Farm is located on a 22-acre site in the Town of Westford, along Route 3 at Exit 33. Currently, the project generates 4.5 MW, and will generate 5.5 MW by the end of the calendar year under full buildout. The proponent has received a \$5.8 million Qualified Energy Conservation Bond as part of its financing package, and a Federal 1603 grant has covered 30% of the construction costs. A second solar farm project is planned on Westford Road in Tyngsborough near Exit 34 off Route 3. This project will generate 5 MW and is estimated to cost \$23 million. A 6 MW solar farm is also planned for the site of Shaffer Landfill in Billerica, an EPA Superfund site. In addition, the City of Lowell will be installing solar panels at its closed landfill at Drum Hill.

The Town of Chelmsford has been accepted into the first round of the SolarizeMass 2013 Program. As the first town in the Northern Middlesex Region to participate in SolarizeMass, Chelmsford will partner with Carlisle, to increase the number of residential solar installations in their community.

Currently, there are no wind energy conversion systems located in the Northern Middlesex region. However, the City of Lowell, the Town of Pepperell, and the Town of Dunstable have wind energy zoning regulations in place, and the Towns of Dracut and Tyngsborough currently

have zoning regulations in place that may allow a wind energy system. In general, the Northern Middlesex region is not an ideal area for siting commercial wind energy facilities based on the topography and average wind speeds. According to MassCEC's map of wind turbines in Massachusetts, the closest wind turbines are located in the Montachusett Region, in the towns of Princeton and Gardner.

Table 21: Solar Energy Installations by Community

| NMCOG Communities | College / University | | Commercial / Office | | Industrial | | Multi-family Residential | | Municipal / Government / Public | | Other | | Residential | | Retail | | Grand Total | |
|-------------------|----------------------|---------------|---------------------|-----------------|------------|-----------------|--------------------------|---------------|---------------------------------|-----------------|----------|-----------------|-------------|-----------------|----------|---------------|-------------|------------------|
| | No. | kW | No. | kW | No. | kW | No. | kW | No. | kW | No. | kW | No. | kW | No. | kW | No. | kW |
| Billerica | 0 | 0.00 | 4 | 169.18 | 1 | 82.25 | 0 | 0.00 | 0 | 0.00 | 1 | 5,999.00 | 65 | 351.66 | 0 | 0.00 | 24 | 6,602.09 |
| Chelmsford | 0 | 0.00 | 4 | 97.75 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 56 | 315.46 | 0 | 0.00 | 30 | 413.21 |
| Dracut | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 1 | 229.36 | 0 | 0.00 | 0 | 0.00 | 49 | 292.09 | 0 | 0.00 | 3 | 521.45 |
| Dunstable | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 7 | 34.82 | 0 | 0.00 | 70 | 34.82 |
| Lowell | 4 | 246.12 | 9 | 445.18 | 0 | 0.00 | 6 | 495.46 | 2 | 2,114.42 | 0 | 0.00 | 133 | 589.49 | 0 | 0.00 | 9 | 3,890.67 |
| Pepperell | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 11 | 75.11 | 0 | 0.00 | 17 | 75.11 |
| Tewksbury | 0 | 0.00 | 3 | 717.39 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 26 | 142.42 | 1 | 323.40 | 5 | 1,183.21 |
| Tyngsborough | 0 | 0.00 | 3 | 755.33 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 21 | 119.45 | 0 | 0.00 | 13 | 874.78 |
| Westford | 0 | 0.00 | 3 | 525.77 | 5 | 5,532.85 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 44 | 296.09 | 0 | 0.00 | 171 | 6,354.71 |
| Total | 4 | 246.12 | 26 | 2,710.60 | 6 | 5,615.10 | 7 | 724.82 | 2 | 2,114.42 | 1 | 5,999.00 | 412 | 2,216.59 | 1 | 323.40 | 342 | 19,950.05 |

Source: EOEEA RPS Solar Carve-Out Qualified Renewable Generation Units November 22, 2013

5. Green Communities

Municipal governments, through zoning, play a major role in the siting of renewable energy facilities. The Green Communities Division of DOER works closely with municipalities to help lower energy costs and adopt energy efficient technologies, add renewables to their energy mix, and make their fleets more energy efficient. The DOER's Green Communities Grant Program, which was initiated under the Green Communities Act of 2008, uses funding from auctions of carbon emissions permits under the Regional Greenhouse Gas Initiative (RGGI) to provide grants to municipalities who become designated a Green Community. Communities can be designated a Green Community by meeting five clean energy benchmarks:

- Adopting a local zoning bylaw or ordinance that allows "as-of-right-siting" of renewable energy projects;
- Adopting an expedited permitting process related to the as-of-right facilities;
- Establishing a municipal energy use baseline and a program designed to reduce use by 20 percent within five years;
- Purchasing fuel-efficient vehicles for municipal use, whenever such vehicles are commercially available and practicable; and
- Requiring all new residential construction over 3,000 square feet and all new commercial and industrial real estate construction to adopt an energy-saving building "stretch code".⁶

Within the Northern Middlesex region, the communities of Chelmsford, Lowell, Tewksbury and Tyngsborough have received Green Community designation (Table 22). Being designated a Green Community provides grant funding to a municipality to support all or a portion of the cost of the following:

- Studying, designing, constructing and implementing energy efficiency activities, including but not limited to energy efficiency measures and projects;
- Procuring energy management services;
- Installing energy management systems;
- Adopting demand-side reduction initiatives or energy efficiency policies; and
- Siting activities and construction of a renewable energy generating facility on municipally-owned land.

"...[The Green Communities Grant]...is the latest testament to Lowell's ongoing efforts to boost its profile as a sustainable and progressive community. Few cities of our size in the country have done more in the area of energy efficiency, which helps the environment, saves money for building owners and taxpayers, and promotes the City's image as an attractive and green place to invest."

-Lowell City Manager Bernard Lynch, June 29, 2012

⁶ For additional detail on the stretch-code, see Section F – Energy Efficiency and Green Building Techniques.

Table 22: Green Community Designation and Grant Awards in the Greater Lowell Region

| Community | Designation Date | Green Community Grant Award | Project Summary |
|--|------------------|-----------------------------|---|
| Chelmsford | 5/25/2010 | \$187,224 | Installation of a 30-kW PV system at the Parker Middle School |
| Lowell | 5/25/2010 | \$546,506 | Residential and commercial retrofits and energy management services contract buy-down |
| Tewksbury | 7/19/2011 | \$207,725 | To be determined |
| Tyngsborough | 5/25/2010 | \$161,649 | Building envelope improvements in municipal buildings |
| <i>Source: Massachusetts Department of Energy Resources</i> <i>Note: Westford began the Green Community Designation Process in June 2013, and was awarded Green Community Designation in December 2013.</i> | | | |

6. Energy Efficiency and Green Building Techniques

According to the EPA, buildings and homes in the U.S. account for 68% of the nation's energy consumption and 38% of its carbon dioxide emissions⁷. In Massachusetts, buildings consume more than 50% of the energy used, and are responsible for the greatest greenhouse gas emissions of any sector. Energy use in buildings comes from two primary areas: (1) fuel for heating (primarily oil and natural gas), and (2) electricity for air conditioning, lighting, ventilation, and appliances.⁸

As part of the Green Communities Act of 2008, the state has committed to adopting the latest International Energy Conservation Code (IECC) from the International Code Council (ICC), which develops and maintains model building codes for the United States. In addition to adopting the baseline energy code, and committing to updating it every three years, the Massachusetts Board of Building Regulations and Standards (BBRS) also adopted a local-option "stretch" energy code for municipalities in 2009. Currently, Massachusetts is in the process of updating the Building Code in accordance with the three year timetable. During the update, the more stringent 2009 "stretch" energy code has become the basis for the 2012 baseline building energy code. This means that the new version of both the baseline and "stretch" energy code will become more stringent than their current version. These changes are likely to become effective in 2014.

The Massachusetts Clean Energy and Climate Plan for 2020 proposes to move away from the traditional approach of prescriptive codes, which set minimum standards for each building component or system, toward "performance" or "outcome-based" codes, which set a maximum energy usage criterion for buildings, but allow flexibility in terms of how criterion are met. In

⁷ *Introduction to Residential Green Building in New England. EPA 2008.*

⁸ <http://www.mass.gov/eea/energy-utilities-clean-tech/energy-efficiency/>

addition, the Commonwealth's Plan proposes to use energy rating and labeling of buildings to create greater markets for energy-saving investments in existing structures.

A greater emphasis on energy use will require earlier attention to building design and performance considerations. Through improved siting, design, construction, operation and maintenance practices, resource consumption can be significantly reduced, and impacts on the natural environment can be minimized. Green buildings have the following characteristics:

- Incorporate energy and water efficient technologies;
- Use recycled materials in their construction;
- Minimize construction and demolition waste;
- Are sited and landscaped for energy and water efficiency;
- Employ renewable energy technologies
- Improve indoor air circulation and air quality;
- Provide a healthier and more comfortable environment; and
- Enhance long term economic performance.⁹

Each ENERGY STAR certified new home is independently verified to be at least 15% more energy efficient than a home built to the 2009 International Energy Conservation Code (IECC), and features additional measures that deliver a total energy efficiency improvement of up to 30 percent compared to a typical new home.

www.energystar.gov

For commercial buildings in Class A office space¹⁰, market demand has recently increased for Leadership in Energy and Environmental Design (LEED) certified buildings. In addition, a growing number of relatively energy efficient buildings have opted into the Energy Star Portfolio Manager program, which allows buildings above the 75th percentile in energy performance to receive Energy Star designation. For the residential market, the Energy Star Homes program has achieved significant growth in the housing market in Massachusetts. These voluntary programs have shown that there is market interest in energy conservation and green programs for new buildings.

Retrofitting existing buildings with higher levels of insulation, less air leakage, and better windows would support even deeper energy improvements over time. National Grid currently offers incentives for whole-house retrofits that include energy efficiency measures. In addition, there have been a number of federal programs aimed at providing incentives for efficiency improvements.

For example, The Leading by Example Program (LBE) is a state initiative established in April 2007 by Executive Order No. 484 and overseen by the Executive Office of Energy and

⁹ <http://www.epa.gov/greenbuilding/pubs/components.htm>

¹⁰ According to Building Owners and Managers Association International, Class A office space refers to buildings with higher than average rent for a given area, high quality standard finishes, state of the art systems, exceptional accessibility and a definite market presence.

Environmental Affairs (EOEEA) and the Executive Office for Administration and Finance (EOAF). The program works to reduce the overall environmental impact of state government operations by establishing higher energy efficiency standards in the operation of state buildings, setting short- and long-term targets and goals to advance clean energy and efficiency, and reducing greenhouse gas emissions. The LBE Program, together with DOER, recently directed the use of nearly \$70 million of American Recovery and Reinvestment Act (ARRA) funds.¹¹ Through this process, the majority of funds were invested in expansion of energy efficiency and renewable energy efforts at state facilities, solar installations at public, private and institutional facilities and deep energy retrofits, which are defined as building renovations that result in 50% energy cost savings over that building's baseline energy use.¹²

In addition, the City of Lowell was awarded a \$5 million grant through a Recovery Act BetterBuildings grant program (formerly known as Retrofit Ramp-Up). These funds are used to target energy efficiency retrofit projects that can be replicated, solve technical hurdles, and create or maintain jobs. Lowell's project focuses on energy efficiency retrofit projects that are compatible with historic preservation. The grant has been leveraged through a partnership with National Grid and the Lowell Development Financial Corporation (LDFC). Several local banks are also participating in the loan program. LDFC administers low-interest loans for energy efficiency retrofits within the Downtown Historic District. Projects include new boilers, insulation, lighting, air sealing and other energy efficiency upgrades to commercial and multi-family properties. Projects must achieve a whole building energy use reduction of 15% or more. In addition to the BetterBuildings grant, the City received \$954,700 in ARRA funds to establish a loan program for residential energy efficiency improvements throughout the City. These funds can be applied to residential structures containing one to four units.

7. Green Jobs

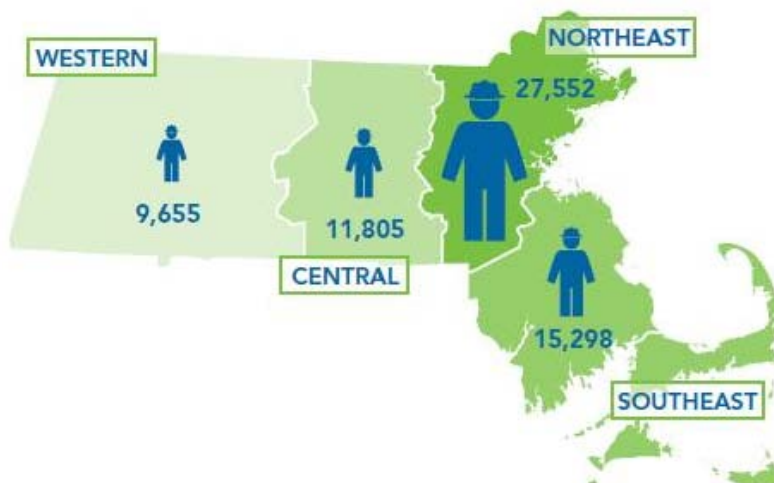
Massachusetts is dedicated to accelerating the success of clean energy technologies, companies and projects in the Commonwealth, while also creating high-quality jobs and long-term economic growth for the people of Massachusetts. Since its inception in 2009, MassCEC has helped clean energy companies grow, supported municipal clean energy projects and invested in residential and commercial renewable energy installations, creating a robust marketplace for innovative clean technology companies and service providers.

Massachusetts has a host of companies and jobs in clean energy, and the industry has continued to grow even during difficult economic times. According to the Massachusetts Clean Energy Industry Report (2011), Massachusetts has 4,909 clean energy firms employing 64,310 clean energy workers, comprising 1.5% of the total employment in the Commonwealth. From July 2010 to July 2011, clean energy employment grew by 6.7 percent, which is higher than the growth rate among all industries in the Commonwealth (1%).

¹¹ The ARRA of 2009 created the largest investment in clean energy and energy efficiency in American history – more than \$80 billion.

¹² *Deep Green Renovation: Broad Scale Strategies for Achieving Deep Energy Savings in Existing Buildings.* Catharine Killien. 2011.

Figure 6: Total Clean Energy Workers by Region



Source: Mass Clean Energy Industry Report 2011

The Massachusetts Clean Energy and Climate Plan for 2020 indicates that between 2007 and 2010, PV systems installed or scheduled for installation increased by a factor of twenty, with jobs in solar manufacturing, installation and services nearly tripling. Wind energy installations increased ten-fold during that same time period. In addition, Massachusetts has launched the most aggressive energy efficiency program in the nation, saving consumers \$6 billion and creating 4,500 jobs.¹³ Furthermore, it is estimated that the implementation of the Massachusetts Clean Energy and Climate Plan for 2020 will induce the creation of nearly 20,000 jobs. From 2010 to 2020, the Massachusetts RPS is estimated to stimulate \$360 million in annual investment or \$3.9 billion in cumulative investment in clean power generation than would have otherwise occurred. This is expected to create 900 full-time construction jobs over that ten-year period. Expanding solar hot water energy systems will create and increase businesses in Massachusetts, as has already happened with the solar PV market, where 1,800 new jobs have been added since 2008. Such jobs include system marketing, design, finance, installation and maintenance, manufacturing and fabrication.

¹³ *Massachusetts Clean Energy and Climate Plan for 2020, Executive Office of Energy and Environmental Affairs, December 29, 2010.*

8. Tools and Incentives for Renewable Energy and Energy Conservation

Residents of Massachusetts have several options for funding the installation of renewable energy systems. The following is a concise description of some of the programs that are currently available. Programs and incentives have been grouped according to general categories and include tax incentives and initiatives for solar, wind and alternative energy.

a. Energy Efficiency Programs

Qualified Energy Conservation Bonds or “QECCB” are taxable bonds issued by a State or local government to finance one or more “qualified conservation purposes.” To date, the Commonwealth has awarded \$36 million of the \$50 million available for projects aimed at reducing energy consumption in public buildings by at least 20% and generating clean renewable energy across the state. QECCBs provide a Federal income tax credit to bond holders that allow issuers (municipalities/public entities) to obtain a very low rate of financing for their energy projects. From a municipality’s perspective, the federal income tax credit means that the federal government pays a significant portion of their interest, which results in a significantly lower net interest rate than other borrowing mechanisms available for these types of projects.

- *MassDevelopment’s Green Loan Program* helps businesses optimize energy efficiency and reduce energy costs by bridging the gap between energy efficiency project costs and the rebates or subsidies provided by utility companies and state/federal incentive programs. To be eligible, an organization must be a non-profit or for-profit business in Massachusetts, have been in existence for at least five years, and demonstrate an ability to repay the loan. Loans are available in the amounts of \$50,000 to \$500,000 and are net of project-related rebates or subsidies. Loans may only be made for projects that receive approval for a utility rebate under a public utility sponsored energy efficient program authorized by the Massachusetts Department of Public Utilities, or through an approved subsidy from a state/federal energy efficiency incentive.
- The *Energy Performance Improvement Program (EPIP)*, a MassHousing Partnership (MHP) initiative, provides financing to owners of multi-family affordable housing properties that have received their first mortgage financing from MHP. MHP provides up to \$15,000 per unit to finance energy efficiency and energy conservation improvements, which ultimately reduce energy consumption and costs.
- The *Low Income Multi-Family Energy Retrofits Program* allows low income multi-family properties owned by public housing authorities, non-profit organizations and for-profit organizations to receive assistance in improving the energy efficiency of their buildings. The program targets high-energy users and projects with opportunities to obtain cost-effective energy efficiency improvements. The program evaluates building performance and proposes a suite of measures to enhance energy efficiency. If the applicant and the utility agree with the proposal, then the Low Income Energy Affordability Network (LEAN) provides the work through their pool of contractors.
- The *Massachusetts Green Retrofit Initiative* offers energy management services to assist building owners in identifying green retrofit opportunities within their portfolios, securing funding and financing packages for green retrofit projects, and managing retrofit construction and post-construction activities. There is no cost to the owner for these

energy management services as the program is funded by The Barr Foundation and the U.S. Department of Housing and Urban Development.

- The *Community Energy Strategies Pilot Program* helps communities identify and enable local opportunities for clean energy development. This program assists municipalities and/or Regional Planning Agencies in identifying and developing strategies for implementing the mix of clean energy projects and incentives best suited to address local interests, needs, and opportunities for clean energy development.
- *Mass Save* is an initiative sponsored by the state's gas and electric utilities and energy efficiency service providers. The sponsors of Mass Save work closely with the DOER to provide a wide spectrum of services, incentives, training sessions, and information for residents and businesses to efficiently manage energy use. For example, the Massachusetts New Homes portion of the program allows home builders to receive up to \$8,000 in incentives for building new homes more efficiently than the typical Massachusetts home. The residential portion of the program allows residents to participate in a home energy assessment, and to receive information about offers and rebates to increase energy efficiency. For example, residents can receive a 75% rebate for up to \$2,000 of approved insulation upgrades.

b. Renewable Energy Programs

- *State Personal Income Tax Credits* are available to individuals who install a renewable energy system to generate electricity or provide mechanical energy for his/her primary residence in Massachusetts. Massachusetts residents can claim the Solar and Wind Energy Credit of 15% of the net expenditure for the system, or \$1,000, whichever is less. This credit does not apply to commercial users.
- *Federal Personal Income Tax Credits* apply to solar-electric systems, solar water heating systems, fuel cells, small wind-energy systems and geothermal heat pumps. The credit allows a taxpayer to claim a credit of 30% of qualified expenditures for a system that serves a dwelling unit located in the United States that is owned and used as a residence by the taxpayer.
- *Corporate Income Tax Deductions* are available to businesses that purchase a qualifying wind or solar powered climatic control unit or water heating unit. A business can deduct from its net income, for state tax purposes, any costs incurred from installing the unit, provided the unit is located in Massachusetts and is used exclusively in the trade or business of the corporation.
- *State Sales Tax Exemption*. State law exempts from the state sales tax the sales of equipment used directly in a wind, solar, or heat pump system to be used as a primary or auxiliary power system for heating or otherwise supplying the energy needs of a person's principal residence in Massachusetts. This exemption does not apply to commercial users.
- The *Commonwealth Hydropower Program* provides grants for ecologically-appropriate projects that can be implemented quickly and efficiently. Eligibility is generally limited to projects that can demonstrate a high likelihood of qualifying for the Massachusetts RPS. Sample projects include upgrades to existing facilities that will result in greater generation, and development of new facilities that take advantage of the water flowing in man-made conduits, such as water distribution systems.

c. Alternative Energy Programs

- The *Commonwealth Organics-to-Energy* grant program offers grants to support the use of anaerobic digestion and other technologies that convert source-separated organic wastes into electricity and thermal energy. Funding is available for feasibility studies, construction and pilot projects, and technical studies.
- *Clean Cities Coalition* is part of a nationwide program that promotes the adoption of alternative fuel vehicles, and supports the development of infrastructure necessary to make such vehicles a viable transportation option. The coalition provides several types of assistance, such as grant funding opportunities, education and training for the safety and maintenance of vehicles and infrastructure, and technical assistance with alternative fuel projects.
- *The Commonwealth Outdoor Hydronic Heater (OHH) Change-Out Pilot Program* replaces older or improperly operated outdoor wood boilers. This program, which is run through MassCEC and DOER, will provide a rebate for \$15,000 or 100% of equipment and installation costs. An OHH is defined as a fuel burning device designed to burn wood or other approved solid fuels as an outdoor installation (or installed in a structure not meant for human occupation) which heats a building and/or water.

IV. REGIONAL PROJECTS

This section of the *2010-2013 CEDS Update* focuses upon the Priority Projects and Major Regional Projects in the Greater Lowell region that have an economic impact upon the regional economy. The first section outlines the CEDS Priority Project RFP Process that included the active involvement of the Greater Lowell CEDS Committee and input from member communities regarding critical projects that were important to the economic growth of the region. The CEDS Priority Project RFP package consisted of a cover letter, Priority Project criteria and a one-page project description form (see Appendix IV). In the case of those projects under consideration for EDA funding, the FY 2012 EDA Investment Policy Guidelines were made available as part of the overall selection criteria for the Priority Projects. The CEDS Priority Project List, which consists of Short-term, Intermediate and Long-term projects, is included as part of this section as well. Those projects under consideration for EDA funding are marked with an asterisk. A summary status report regarding those Priority Projects listed in the *Greater Lowell CEDS for 2009-2013* has been included as well. This status report identifies those projects that have been completed, are underway or have been dropped from the Priority Project List.

The Major Regional Projects are those projects in the region that have a significant economic impact upon the Greater Lowell economy. These projects contribute to the regional economy through infrastructure investments, corridor studies, master plans or technical assistance to local communities. These investments will lead to additional projects in the future and continue to address the goals established in the *Greater Lowell CEDS for 2009-2013*.

A. CEDS PRIORITY PROJECT RFP PROCESS

The Greater Lowell CEDS Committee worked with NMCOG staff in 2011 to develop the CEDS Priority Project RFP package that was mailed to the Greater Lowell communities. NMCOG staff originally worked with the Greater Lowell CEDS Committee to develop the project criteria for inclusion on the CEDS Priority Project List. The criteria were established based upon the EDA Investment Policy Guidelines and the additional criteria – regional, community, job creation/ workforce development, and project readiness- which are important to development in this region. All Priority Projects needed to meet these criteria and were then categorized based upon the expected timeframe to complete the specific project. Short-term projects were expected to be implemented within 12-18 months, while Intermediate projects (2-4 years) and Long-term projects (5+ years) were expected to take much longer. These Priority Projects addressed at least one of the goals established in the *Greater Lowell CEDS for 2009-2013* and NMCOG encouraged the movement of these projects from Long-term to Intermediate to Short-term status over the five-year period.

Consistent with what had been completed in the past, NMCOG staff requested that local communities update their information on existing Priority Projects and submit complete information on new projects. The CEDS Priority Project RFP package was submitted to the Greater Lowell CEDS Committee for their review and approval at their meeting on January 12, 2012. The CEDS Priority Project RFP package was sent out on February 24, 2012 and the respective communities were requested to submit their Priority Projects by March 30, 2012 so that the Greater Lowell CEDS Committee could approve them at their April 10, 2012 meeting. Due to some delays in receiving the information for the Priority Projects, the Greater Lowell

CEDS Committee finally approved the CEDS Priority Projects at their June 12, 2012 meeting. The CEDS Priority Projects were then discussed at the June 20, 2012 NMCOG Council meeting so that the elected and appointed representatives of the Council were able to provide input to the process as well.

Based upon the additional input provided by Council members and the local communities, a final CEDS Priority Projects listing dated October 2013 was developed for review by the Greater Lowell CEDS Committee and the NMCOG Council. The final CEDS Priority Projects List for 2010-2013 was approved by the Greater Lowell CEDS Committee at their January 14, 2014 meeting and subsequently approved by the NMCOG Council at its January 15, 2014 meeting. A listing of the CEDS Priority Projects for 2010-2013 is included in this section. Additional material related to the CEDS Priority Projects RFP package is included in Appendix IV, while the minutes for the CEDS Committee and NMCOG Council meetings are included in Appendices II and III.

B. FY 2013 EDA INVESTMENT PRIORITIES

NMCOG utilizes the established EDA Investment Priorities whenever it is applying for EDA funding or is working with prospective EDA applicants. These priorities are made available to prospective project applicants during the annual RFP process to ensure that all Greater Lowell projects are consistent with the established EDA Investment Priorities. As established by EDA, the Investment Priorities provide an evaluation framework to encourage projects that *advance global competitiveness, create jobs, leverage public and private resources, can demonstrate readiness and ability to use funds quickly and effectively, and link to specific and measurable outcomes* as follows:

1. Collaborative Regional Innovation

Initiatives that support the development and growth of innovation clusters based on existing regional competitive strengths. Initiatives must engage stakeholders; facilitate collaboration among urban, suburban and rural (including tribal) areas; provide stability for economic development through long-term intergovernmental and public/private collaboration; and support the growth of existing and emerging industries.

2. Public/Private Partnerships

Investments that use both public- and private-sector resources and leverage complementary investments by other government/public entities and/or nonprofits..

3. National Strategic Priorities

Initiatives that encourage job growth and business expansion related to advance manufacturing; information technology (e.g., broadband, smart grid) infrastructure; communities severely impacted by automotive industry restructuring; urban waters; natural disaster mitigation and resiliency; access to capital for small, medium-sized, and ethnically diverse enterprises; and innovations in science and health care.

4. Global Competitiveness

Initiatives that support high-growth businesses and innovation-based entrepreneurs to expand and compete in global markets, especially investments that expand U.S. exports, encourage foreign direct investment, and promote the repatriation of jobs back to the U.S.

5. Environmentally-Sustainable Development

Investments that promote job creation and economic prosperity through projects that enhance environmental quality and develop and implement green products, processes, places, and buildings as part of the green economy. This includes support for energy-efficient green technologies.

6. Economically Distressed and Underserved Communities

Investments that strengthen diverse communities that have suffered disproportionate economic job losses and/or are rebuilding to become more competitive in the global economy.

C. CEDS PRIORITY PROJECT LIST

The listing of CEDS Projects for the Greater Lowell Region has been organized according to short-term (up to 18 months), intermediate (2-4 years), or long-term (5+ years) implementation schedules. Organizing the CEDS projects in this way helps distinguish those projects that are construction ready from those that are more long-term in nature.

The CEDS Priority Project lists are comprised of projects identified principally by the nine municipalities in the Greater Lowell region, as well as projects that are included in the region's Transportation Improvement Program (TIP). The TIP Program is completed annually by the Northern Middlesex Metropolitan Planning Organization (NMMPO), which is staffed by NMCOG. As a means to show movement within the CEDS Priority Projects, a summary of the project changes is included in this document as well. The short-term, intermediate, and long-term projects are summarized in table format on the following pages. These tables include the following information:

- Project Name;
- Project Description;
- Project Proponent;
- Total Cost, Funding Sources;
- Start Date;
- Environmental Impact;
- Number of Jobs Created; and
- CEDS Goals Addressed.

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|---|--|-------------------------|---|------------|------------------------------------|----------------------|-----------------|
| 2013 | | | | | | | | |
| JAM Plan* | Neighborhood Revitalization | City of Lowell | \$850M | Federal, state, private and local funds | 2013 | 170 perm./full-time jobs | Yes, positive | 1, 4, 8 |
| Hamilton Canal* | Development of residential, commercial and institutional uses. | City of Lowell | \$800M | Federal, state, local and private funds | 2013 | 1,000 full-time and temporary jobs | Yes, positive | 1, 4, 8 |
| Hamilton Crossing Mill 2 | Development of housing and health clinic | Winn Development | \$15M | Federal, state, local and private funds | 2013 | TBD | Yes, positive | 1, 4, 8 |
| Hamilton Crossing Mill 4 | Development of housing, R & D, commercial offices, and light mfg. facilities. | Bank of America CDC, Lowell Community Health Center, Arch. Heritage Foundation | \$20-25M | Federal, state, local and private funds | 2013 | 318 construction 133 permanent | Yes, positive | 1, 4, 8 |
| Tanner Street Initiative* | Remediation work for Silresim Superfund site | City of Lowell | \$ 25M + | Federal, state, local and private funds | 2013 | 10-12 construction jobs | Yes, positive | 1, 8 |
| Siting of Renewable Energy Facilities* | Joint application from NMCOCG and MRPC to encourage the siting of energy facilities | NMCOCG/ MRPC | \$ 377k | EDA technical assistance grant and matching funds | 2013 | NA | Yes, positive | 1, 6, 7, 8 |
| Economic Development District Designation (EDD)* | Designation of NMCOCG as EDD | NMCOCG | Annual planning grants | Federal: \$60k Match : \$60k | 2013 | NA | No | 1,7 |
| Sewer Line Extension | Extension of sewer lines | Town of Billerica | \$ 3M per contract | Local | 2013 | TBD | Yes, positive | 1, 6 |
| Sewer Plant Upgrade and Evaluation | Upgraded wastewater treatment plant | Town of Billerica | \$9M | Local | 2014 | 98 const. jobs (est.) | Yes: positive | 6 |
| 43 Katrina Road | Redevelopment of town-owned brownfield property; 43D designation | Town of Chelmsford | \$ 2.1M for remediation | Federal:\$250k State: \$2 M | 2013 | 28 const. jobs(est.) | Yes: positive | 1, 8 |
| 970 Broadway Industrial Redevelopment | Redevelop brownfield site for industrial use. | Town of Dracut | Unknown | Federal and state | 2014 | TBD | Yes | 1, 8 |
| Town Hall Construction | Acquisition of 1.03 acre lot and construction of new town hall | Town of Dracut | \$ 8M | Local | 2013 | N/A | N/A | 6 |
| Dracut High School | Construction of Dracut High School | Town of Dracut | \$ 60M | State and local | 2013 | TBD | N/A | 3,6 |
| Sewer Project Contract Number 30/31 | Methuen Street area | Town of Dracut | \$ 9M | Local | 2013 | N/A | N/A | 6 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|--|--|----------------------|------------|------------------------------------|------------|--|----------------------|-----------------|
| Water Line Upgrade | Upgrade of existing water lines | Town of Dunstable | \$500k | Federal and state funds | 2013 | TBD | Yes | 1, 4, 6 |
| Route 113 Retaining Wall | Reconstruction of retaining wall at McGovern's Farm | Town of Dunstable | \$ 773k | Federal and state funds | 2013 | N/A | Yes | 5, 8 |
| Neighborhood Business Center Improvements | Business assistance, traffic calming, sidewalk and street improvements | City of Lowell | Unknown | Federal and local | 2013 | TBD | No | 5 |
| Downtown Improvements | New crosswalks that meet ADA requirements | City of Lowell | Unknown | Unknown | 2013 | TBD | Unknown | 5, 8 |
| Upper Merrimack Traffic Calming & Street Improvements | Redevelop commercial core | City of Lowell | Unknown | Federal, state, and local | 2013 | TBD | Unknown | 1, 4, 5 |
| Water Treatment System Assessment and Upgrade | Assessment and upgrade of facility | Town of Tewksbury | \$ 6.25M | N/A | 2013 | N/A | N/A | 6,8 |
| Water Distribution System Improvements | Improve fire flow/reduce breaks | Town of Tewksbury | \$ 4.5M | N/A | 2013 | N/A | N/A | 6 |
| Stormwater Improvement Plan | Develop plan to prevent local drainage problems, flooding | Town of Tewksbury | \$ 1.4M | N/A | 2013 | N/A | N/A | 6 |
| Tewksbury Master Plan | Update of the 2003 Master Plan | Town of Tewksbury | \$ 62k | DLTA VI and VII | 2013 | NA | N/A | 1, 4, 5, 8 |
| Tyngsborough Old Town Hall Renovation | Creation of community area and meeting hall consistent with Master Plan. | Town of Tyngsborough | \$2.5M | Community Preservation Funds | 2013 | 10-15 construction jobs; 1 full time job | N/A | 1,7, 8 |
| Affordable Housing at Red Pine Terrace | Construction of four affordable housing units. | Town of Tyngsborough | \$ 800k | Community Preservation Funds | 2013 | TBD construction jobs | Unknown | 4, 7, 8 |
| Boston Road Affordable Housing Development | 20 single family homes at 100% affordability and land conservation | Town of Westford | \$ 2.83M | Public land and private funds | 2013 | 31 const. jobs (est.) | Yes, positive | 4, 8 |
| Minot's Corner Route 110 | Roadway reconstruction and intersection improvements | Town of Westford | \$ 4.2M | Federal: \$ 3.4M State: \$ 840k | 2013 | 43 const. jobs (est.) | No | 5, 6 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|--|--|-------------------|------------|------------------------------------|------------|------------------------|----------------------|-----------------|
| Greater Lowell Ex-Offender Re-Entry Partnership | Focused reentry services that reduce recidivism | GLWIB | \$50k | State | 2013 | N/A | N/A | 1, 2 |
| Safe and Successful Youth Initiative | Serves 13 series proven at-risk young adults | GLWIB | \$100k | State | 2013 | N/A | N/A | 2 |
| Connecting Activities | Sustaining statewide school-to-work system | GLWIB | \$105k | State | 2013 | N/A | N/A | 1, 2, 3 |
| Workforce Training Fund Program – Greater Lowell Initiative | Provide resources to Mass. Businesses and workers for training current and newly-hired employees | GLWIB | N/A | Varies: Grants up to \$250k | 2013 | N/A | N/A | 1, 2 |
| Wood Street /Rourke Bridge Study | Feasibility analysis | NMMPO | \$ 550k | Federal: \$ 440k State: \$ 110k | 2013 | NA | No | 1, 5, 6 |
| University Ave. (Textile) Bridge | Bridge replacement | MassDOT | \$ 43.2M | Federal and state | 2013 | 217 const. jobs (est.) | No | 5 |
| Lowell Connector Lighting Upgrades | Upgrade highway lighting | MassDOT | \$ 4.1M | Federal and state | 2013 | N/A | No | 5 |
| Capital Maintenance | Gallagher Terminal | LRTA | \$1.2M | Federal and State | 2013 | NA | NA | 5 |
| Capital Assistance | Replacement of four cut-a-way transit buses | LRTA | \$360k | Federal: \$226k State: \$56k | 2013 | NA | Yes | 5 |
| Operating Assistance: JARC | Weekday Evening Service Expansion | LRTA | \$1.1M | Federal and local | 2013 | Yes | Yes | 5 |
| Capital Assistance | Capital Spare Parts | LRTA | \$130k | Federal and RTACAP | 2013 | No | No | 5 |
| Operating Assistance | Urbanized area service fixed route and paratransit operations | LRTA | \$3.3M | Federal and State | 2013 | No | No | 5 |
| Planning Assistance | Short Range Planning | LRTA | \$100k | Federal and State | 2013 | No | No | 5 |
| Capital Assistance | Seven Lift and radio equipped vehicles and computer | LRTA | \$376k | Federal and state | 2013 | NA | NA | 5 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|---|-------------------|------------|-----------------------------|------------|--------------|----------------------|-----------------|
| Operating Assistance | Rural Assistance | LRTA | \$15k | Federal | 2013 | NA | NA | 5 |
| Operating Assistance : JARC | Seasonal Pheasant Lane Service | LRTA | \$8.5k | Federal and local | 2013 | Yes | Yes | 5 |
| ITS Equipment | ITS Equipment | LRTA | 700k | Federal and State | 2013 | No | No | 5 |
| 2014 | | | | | | | | |
| EDA Planning Grant* | Maintain CEDS “grass-roots” planning process | NMCOG | \$ 120k | EDA - \$ 60k Match - \$ 60k | 2014 | N/A | No | 1, 4, 7 |
| Arlington Street Reconstruction | Arlington Street from Broadway Road to Methuen Street | Town of Dracut | \$8.1M | Federal and state | 2014 | N/A | Some wetlands impact | 5 |
| Navy Yard Mill Redevelopment | Redevelopment of vacant space. | Town of Dracut | \$ 3.8M | Private | 2014 | TBD | No | 1 |
| Sewer Project Contract Number 32 | Turtle Hill Road Area | Town of Dracut | \$4.6M | SRF Loan | 2014 | TBD | Yes; Positive | 6 |
| Pawtucket Canal Bridge Construction* | Construction of new bridge to support the Hamilton Canal District Development Project | City of Lowell | TBD | N/A | 2014 | N/A | N/A | 6 |
| Combined Sewer Overflow (CSO – Phase 1A) | Treatment plant and collection system improvements to reduce discharges | City of Lowell | \$ 40M | Federal, state and local | 2014 | TBD | Yes | 8 |
| Downtown Improvements | Converting one way traffic to two-way traffic. | City of Lowell | Unknown | Unknown | 2014 | TBD | Unknown | 5,8 |
| East Street Reconstruction Phase 1 | Drain and road reconstruction: Jill’s Way to RR tracks | Town of Tewksbury | \$990k | Town | 2014 | NA | NA | 5 |
| East Street Reconstruction Phase 2 | Drain and road reconstruction: RR tracks to Maple Street | Town of Tewksbury | \$500K | Town | 2014 | NA | NA | 5 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|--|--|---|--|---|------------|-------------------------------------|----------------------|-----------------|
| Town Center Development/ Preservation : Adams Barn Rehabilitation and First Parish Church Restoration | Implementation of Master Plan for Town Center | Town of Tyngsborough | \$100k: Adams Barn; \$570k: First Parish Church | Federal, state, local, private and nonprofit | 2014 | 6-10 temporary construction jobs | No | 1, 4, 8 |
| Sewer Expansion Phase I | Expansion of sewer capacity to accommodate economic growth | Town of Tyngsborough | \$8.8M for Phase I and Phase II | Federal and state | 2014 | Construction, commercial and retail | Yes; positive | 1, 6 |
| Bruce Freeman Rail Trail (Phase II-A) | Southward extension of Rail Trail (4.88 miles) | Towns of Westford, Acton, and Carlisle | \$11M | Federal and state | 2014 | TBD | Yes: positive | 5, 8 |
| Princeton Westford Apartment Homes | Public Infrastructure related to 200 housing Units | Town of Westford | \$2.04M | MassWorks (pending) | 2014 | TBD | No | 4, 5, 6 |
| Graniteville Mills/Westford Anodizing/12 North Main Street | Conversion of underutilized former industrial/brownfield sites to productive use | Town of Westford | N/A | State – MassDevelopment Brownfield Fund | 2014 | N/A | Yes; Positive | 1,8 |
| Stonybrook Housing II | 36 units of affordable housing, expansion of existing 15 unit project | Common Ground; Westford Housing Authority | unknown | Local: \$300,000 CPA Affordable Housing Trust Fund; State: pending | 2014 | TBD | Yes | 4 |
| Bridge reconstruction | Reconstruction of Main Street Bridge over Salmon Brook | MassDOT | \$1.4M | Federal: \$1.1M State: \$288k | 2014 | N/A | No | 5 |
| Bridge Street, Lakeview Avenue and VFW Highway | Signals and intersection improvements | MassDOT | \$2.2M | Federal:\$1.7M State:\$500k | 2014 | 4 const. jobs (est.) | No | 5 |
| East Street/Dascomb Rd and Shawsheen St | Signal and Intersection Improvements | MassDOT | \$1.6M | Federal: \$1.3M State: \$324k | 2014 | NA | No | 5 |
| Main St Bridge Replacement over Salmon Brook | Bridge Replacement | MassDOT | \$1.4M | Federal: \$1.2M State: \$288k | 2014 | NA | Yes | 5 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|-------------------------------|---|-------------------|------------|-----------------------------------|------------|--------------|----------------------|-----------------|
| Interstate Maintenance | Interstate 495 improvements | MassDOT | \$12.9M | Federal: \$11.6M State: \$1.3M | 2014 | N/A | N/A | 5 |
| Route 38 Resurfacing | Road resurfacing | MassDOT | \$ 2.0M | Federal: \$81.6M State: \$400k | 2014 | N/A | N/A | 5 |
| Capital Spare Parts | Capital spare | LRTA | \$ 130k | Federal and state | 2014 | N/A | No | 5 |
| Planning Assistance | Short Range Transit Planning | LRTA | \$100k | Federal and state | 2014 | N/A | No | 5 |
| Capital Assistance | Gallagher Parking Garage Construction | LRTA | \$4M | Federal and State | 2014 | Yes | No | 5 |
| Capital Assistance | Replace CNG Buses (6) | LRTA | \$2.4M | Federal and State | 2014 | No | No | 5 |
| Capital Assistance | Mid Life Overhaul (8) 2008 Gillig Buses | LRTA | \$105k | State | 2014 | No | No | 5 |

SHORT TERM PROJECTS (UP TO 18 MONTHS)

INTERMEDIATE PROJECTS (2 TO 4 YEARS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|---|--|------------|---|------------|-----------------------|----------------------|-----------------|
| 2014 | | | | | | | | |
| 970 Broadway Industrial Redevelopment | Redevelop Brownfield site for industrial use. | Town of Dracut | Unknown | Federal and state | 2014 | TBD | Yes | 1, 8 |
| Riverside Senior Affordable Housing | Develop town-owned parcel for affordable housing. | Town of Dracut | \$4.5M | Federal: \$3.15M Private: \$1.13 M Nonprofit: \$220k | 2014 | 49 const. jobs (est.) | Yes | 4 |
| Sewer Project Contract Number 32 | Turtle Hill Road Area | Town of Dracut | \$4.6M | State: SRF Loan | 2014 | TBD | Yes; Positive | 6 |
| New Senior Center Building | A new Senior Center building to be built by a private developer, as required by a Chapter 40B Comprehensive Permit, and turned over to the Town | Tyngsborough Partners, LLC, Town of Tyngsborough | \$800,000 | Private | 2014 | TBD | Yes | 8 |
| Sewer Expansion | Expansion of sewer capacity to accommodate economic growth | Town of Tyngsborough | Unknown | Federal and state | 2014 | TBD | Yes (positive) | 1, 6 |
| Greater Lowell Technical High School Repair, Renovations, & Addition | Repairs and renovations to the existing structure to include new science labs, and the addition of a new cafeteria | Greater Lowell Technical High School | \$65.3M | State (MSBA) and Greater Lowell Technical High School assessments to member communities | 2014 | TBD | Yes | 2, 3, 8 |
| 2015 | | | | | | | | |
| Allen Road | Reconstruction of Allen Road from Route 3A to Webb Brook Road | Town of Billerica | \$5.6M | Federal and state | 2015 | 49 const. jobs (est.) | Yes | 5 |
| Sewer Plant Upgrade and Evaluation Phase 2 | Pump Station upgrades | Town of Billerica | \$12M | Local | 2015 | BD | Yes: positive | 6 |

INTERMEDIATE TERM PROJECTS (2 TO 4 YEARS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|---|-------------------|------------|----------------------------------|------------|--------------|----------------------|-----------------|
| Capital Assistance | 30' Bus rolling stock (12) | LRTA | \$4.2M | Federal and state | 2015 | N/A | No | 5 |
| Capital Assistance | Replacement of Fixed Route Mini Buses (3) | LRTA | \$240k | Federal and state | 2015 | N/A | No | 5 |
| Preventive Maintenance | Preventive Maintenance | LRTA | \$1.3M | Federal and state | 2015 | N/A | No | 5 |
| Operating Assistance | Urbanized area service fixed route and paratransit operations | LRTA | \$3.3M | Federal and state | 2015 | N/A | No | 5 |
| Capital Spare Parts | Capital spare | LRTA | \$130k | Federal and state | 2015 | N/A | No | 5 |
| Planning Assistance | Short Range Transit Planning | LRTA | \$100 k | Federal and state | 2015 | N/A | No | 5 |
| Interstate 495 improvements | Highway Improvements | MassDOT | \$16.7M | Federal and state | 2015 | N/A | No | 5 |
| Capital Assistance | Gallagher Parking Garage Construction | LRTA | \$4M | Federal and State | 2015 | Yes | No | 5 |
| Capital Assistance | Replace CNG Buses (6) | LRTA | \$2.4M | Federal and State | 2015 | No | No | 5 |
| Capital Assistance | Mid Life Overhaul (8) 2008 Gillig Buses | LRTA | \$105k | State | 2015 | No | No | 5 |
| Bridge improvements at Hunt Rd over I-495 | Bridge Preservation | MassDOT | \$8.25M | Federal: \$6.6M State: \$1.7M | 2015 | No | No | 5 |
| Replacement of Market St Bridge over Western Canal | Bridge Replacement | MassDOT | \$3.7M | Federal : \$3M State: 758k | 2015 | No | No | 5 |

INTERMEDIATE TERM PROJECTS (2 TO 4 YEARS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|--|--|-------------------|------------|-----------------------------------|------------|---|----------------------|-----------------|
| Replacement of VFW Hwy Bridge over Beaver Brook | Bridge Replacement | MassDOT | \$ 14M | Federal: \$11.3M State: \$2.8M | 2015 | TBD | No | 5,6 |
| Central Fire Station | Replace and expand central fire station and dispatch | Town of Westford | Unknown | TBD | 2015 | TBD | No | 8 |
| 2016 | | | | | | | | |
| Central Fire Station | Construction of new fire station | Town of Tewksbury | \$9M | Local: \$8.4M | 2016 | 98 const. jobs (est.) | Yes | 8 |
| Route 38 intersection improvements | Reconstruct four intersections in Lowell | MassDOT | \$2.6M | Federal: \$2.3M State: \$276k | 2016 | NA | No | 5 |
| Route 110 / Tadmuck Road Int. Improve. | Signalize intersection and other improvements | Town of Westford | \$2.2M | Federal: \$1.7M State: \$440K | 2016 | N/A | N/A | 5 |
| Rte 40 at Oak Hill and Dunstable Rd Intersection Improvements | Safety Related Improvements to two intersections in Westford | Town of Westford | \$3M | Federal and State | 2016 | No | No | 5 |
| Middlesex Turnpike (Phase III) | Reconstruction of Middlesex Turnpike from Bedford line. | Town of Billerica | \$21 M | Federal and state | 2016 | 80 const. jobs (est.) ; Unknown permanent jobs | Yes | 5 |
| Preventative Maintenance | Vehicle maintenance | LRTA | \$1.3M | Federal and state | 2016 | N/A | No | 5 |
| Operating Assistance | Urbanized area service fixed route and para-transit operations | LRTA | \$3.3M | Federal and state | 2016 | N/A | No | 5 |
| Capital Spare Parts | Bus parts replacements | LRTA | \$130k | Federal and state | 2016 | N/A | No | 5 |
| Planning Assistance | Short Range Transit Planning | LRTA | \$100 k | Federal and state | 2016 | N/A | No | 5 |
| Rte 4 (North Rd) over I-495 | Bridge Deck Replacement | MassDOT | \$2.5M | Federal: \$1.9M State: \$493k | 2016 | No | No | 5 |

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|--|----------------------------|------------|----------------------------------|------------|-----------------------|----------------------|-----------------|
| 2017 | | | | | | | | |
| Middlesex Canal Enhancement | Canal and walkway improvements | Middlesex Canal Commission | \$3M | Federal and state | 2017 | N/A | NA | 6 |
| Rte 110 at I-495 Traffic signal Installation | Traffic Signal Installation | MassDOT | \$1.3M | Federal: \$1.1M State: \$262k | 2017 | No | No | 5 |
| Tewksbury Rte 38 Resurfacing | Roadway Resurfacing and related improvements | MassDOT | \$1M | Federal: \$844k State: \$211k | 2017 | No | No | 5 |
| Lowell Connector Safety Enhancements | Reconstruction of Gorham Street and safety upgrades for the Lowell Connector | MassDOT | \$1M | Federal: \$840k State: \$210k | 2017 | 67 const. jobs (est.) | No | 5 |
| Mill St over Shawsheen | Bridge Maintenance | MassDOT | \$1M | Federal: \$933k State: \$233k | 2017 | No | No | 5 |
| Preventative Maintenance | Vehicle maintenance | LRTA | \$1.3M | Federal and State | 2017 | N/A | No | 5 |
| Operating Assistance | Urbanized area service fixed route and para-transit operations | LRTA | \$3.3M | Federal and State | 2017 | N/A | No | 5 |
| Capital Spare Parts | Bus parts replacements | LRTA | \$100k | Federal and State | 2017 | N/A | No | 5 |
| Planning Assistance | Short Range Transit Planning | LRTA | \$100 k | Federal and State | 2017 | N/A | No | 5 |
| Trolley Extension | Trolley Service Expansion | City of Lowell and NPS | \$50M | Federal | 2017 | Yes | Yes | 5 |

INTERMEDIATE TERM PROJECTS (2 TO 4 YEARS)

LONG TERM PROJECTS (5+ YEARS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|---|--|----------------------|-------------------------------|--|------------|----------------------------------|----------------------|-----------------|
| 2018 | | | | | | | | |
| UMass Lowell – West Campus | Re-use of property for mixed-income housing. | Town of Chelmsford | Unknown | Federal, state and non-profit funds | 2018 | TBD | Unknown | 4 |
| Pepperell Paper Mill Redevelopment | ETA and 43D Designation granted; Master Plan site study underway | Town of Pepperell | Unknown | Federal, state, local, and private funds | 2018 | TBD | Yes: Positive | 1, 4, 8 |
| 2019 | | | | | | | | |
| Boston Road Improvements (Town Center to Floyd Street) | Resurfacing of town-owned property and construction of new sidewalks and drainage system | Town of Billerica | \$6.2M | State | 2019 | 27 const. jobs (est.) | Yes | 5 |
| Lowell Connector/Thorndike Street Improvements | Improvements made to ramps at Thorndike St and Lowell Connector | City of Lowell | Unknown | Federal and State | 2019 | No | No | 5 |
| Sewer Expansion Phase II | Expansion of sewer capacity to accommodate economic growth | Town of Tyngsborough | \$8.8M for Phase I & Phase II | Federal and state | 2019 | Construction, commercial, retail | Yes; positive | 1, 6 |
| Pawtucket Falls Overlook Trail | Improvements to existing walking trail along Pawtucket Blvd and new scenic trail | NPS | \$1.4M | Federal and State | 2019 | No | Yes | 5 |
| VFW Highway Improvements | Resurfacing and related work. | MassDOT | \$5.7M | Federal and State | 2019 | N/A | Yes | 5 |
| Transit Buses | Purchase three replacement transit buses. | LRTA | \$1M | Federal:\$800k State: \$200 k | 2019 | NA | No | 5 |
| ITS Security | ITS Security | LRTA | \$ 120k | Federal: \$96k State: \$ 24k | 2019 | NA | No | 5 |
| Capital Spare Parts | Purchase capital spare parts. | LRTA | \$ 100k | Federal: \$80k State: \$ 20k | 2019 | NA | No | 5 |
| Capital Maintenance Equipment | Purchase capital maintenance equipment. | LRTA | \$ 100k | Federal: \$80k State: \$20k | 2019 | NA | No | 5 |
| Cut-a-way Buses | Purchase two replacement cutaway buses. | LRTA | \$ 160k | Federal:\$128k State: \$32k | 2019 | NA | No | 7 |

LONG TERM PROJECTS (5+ YEARS)

| Project Name | Project Description | Project Proponent | Total Cost | Funding Source(S) | Start Date | Jobs Created | Environmental Impact | Goals Addressed |
|--|--|--|------------|---|------------|---|----------------------|-----------------|
| Mobility Assistance Vehicles | Purchase mobility assistance vehicles and equipment. | LRTA | \$338k | Federal:\$270k State: \$68 k | 2019 | NA | No | 7, 8 |
| Planning Assistance | Contract with NMCOG | LRTA | \$100k | Federal: \$80k State: \$20k | 2019 | NA | No | 7 |
| 2020+ | | | | | | | | |
| Yankee Doodle Bike Path | Construction of multi-use trail | Town of Billerica | \$4.0M | Federal, state, and local | 2020+ | NA | Yes | 5 |
| Lord Overpass/ Thorndike Street | Reconstruction of two overpasses to support Hamilton Canal | City of Lowell | \$ 1.5M | Federal, state, or local | 2020+ | NA | No | 5 |
| Lowell Junction Interchange | PDS planning; EIR, EIS, ramp construction. | Towns of Tewksbury, Andover and Wilmington | \$ 150 M | Federal: \$ 120 M State: \$ 30 M | 2020+ | 1,630 const. jobs (est.) Unknown permanent jobs. | Yes | 1, 4, 5, 8 |
| Tyngsborough Senior Housing Complex | Construct affordable housing complex for seniors. | Town of Tyngsborough | Unknown | Unknown | 2020+ | TBD | Yes | 4, 8 |
| Town Center Development/ Preservation | Implementation of Master Plan for Town Center | Town of Tyngsborough | Unknown | Fed., state, local, private and nonprofit | 2020+ | TBD | No | 1, 4, 8 |
| I-495 Mainline Widening | Widening of I-495 between Exit 32 and Exit 39 | MassDOT | Unknown | Federal and State | 2020+ | Construction jobs | Yes | 5 |
| Rourke Bridge Permanent River Crossing | Environmental and permitting for construction of new permanent Rourke Bridge | MassDOT | \$50-75M | Federal and State | 2020+ | Construction | Yes | 5 |
| Commuter Rail Station in North Chelmsford | As part of commuter rail expansion | MassDOT | Unknown | Federal and State | 2020+ | TBD | Yes | 5 |
| Capital Corridor Project | Expansion of Commuter Rail from Lowell to Concord NH | NHDOT | Unknown | Federal and State | 2020+ | TBD | Yes | 5 |

LONG TERM PROJECTS (5+ YEARS)

1. CEDS Priority Project Status Report (as of October 1, 2013)

COMPLETED PROJECTS

EDA Planning Grant (2008)
 EDA Public Works Grant (Hamilton Canal)
 Alexander Road/Cook Street
 Route 3A Signals
 Middlesex Route 3 Branding

 Brown Street Bridge Replacement
 Kronos Expansion at Route 129 (MassWorks)
 Town Sewer
 Bruce N. Freeman Mem. Bike Path (Phase I)
 Regional Economic Target Area Application
 Affordable Housing Plan
 Regional Housing Rehabilitation Application
 Parkhurst Road (ARRA funding)
 Navy Yard Mill Redevelopment (initial project)
 Gallagher Square
 Morton Street Bridge
 Hunts Falls & Rotary Bridge
 Appleton Mills (Hamilton Canal)
 Revere Street Bridge (Hamilton Canal)
 Tanner Street Economic Development Plan
 Rourke Memorial Bridge (rehab)
 Groton Street Bridge
 Sewer expansion (final phase)
 East and Livingston Streets
 Tewksbury Memorial High School
 Tewksbury Housing Production Plan
 River Road
 Tyngsborough Housing Production Plan
 Tyngsborough Bridge
 Pawtucket Boulevard Relocation
 Route 113 Resurfacing
 Route 110 and Powers Road
 Routes 110/225 Improvements (ARRA funding)
 Westford Technology Park (West) Expansion
 Cornerstone Square
 Healthcare Workforce Development Strategic Plan
 Northeast Energy Sector Partnership
 Community Health Center Expansion
 Emerging Technology & Innovation Center
 Service Maintenance Vehicles (ARRA funding)
 Bus Maintenance equipment, etc. (ARRA funding)
 Office Upgrades (ARRA funding)
 Gallagher Terminal Upgrades (ARRA funding)
 Operating Assistance (ARRA funding)
 Operating Assistance (2012)
 Capital Assistance (2012)

PROPONENT

NMCOG
 City of Lowell
 Town of Billerica
 Town of Billerica
 Towns of Billerica, Chelmsford, Bedford,
 Burlington and City of Lowell
 Towns of Billerica, Tewksbury and Wilmington
 Town of Chelmsford
 Town of Chelmsford
 Town of Chelmsford
 Town of Chelmsford
 Town of Chelmsford
 Town of Chelmsford
 Town of Chelmsford
 Town of Dracut
 City of Lowell
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 Town of Pepperell
 Town of Tewksbury
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 Town of Tyngsborough
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 Town of Westford
 Town of Westford
 Town of Westford
 Town of Westford
 GLWIB
 GLWIB
 Lowell Community Health Center
 UMass Lowell
 LRTA
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| Capital Spare Parts (2009-2012) | LRTA |
| Technology and Bus Stop Upgrades (2009) | LRTA |
| Hale Street (2009 and 2010) | LRTA |
| Mobility Assistance Vehicles (2009-2012) | LRTA |
| Hybrid Buses (2009 and 2010) | LRTA |
| Gallagher Terminal (2009 and 2010) | LRTA |
| Planning Assistance (2009-2012)) | LRTA |
| Surveillance Cameras (2009) | LRTA |
| Preventative Maintenance (2009, 2012) | LRTA |
| Minibuses (2010) and Cut-a-way buses (2010) | LRTA |
| Fare Boxes (2010) | LRTA |
| ITS Planning Services/Security (2010 and 2011) | LRTA |
| Bus Stops/Communication (2011) | LRTA |
| Job Access Reverse Commute (2012) | LRTA |

PROJECTS UNDERWAY:

| |
|---|
| Sewer Line Extension |
| Sewer Plant Upgrade and Evaluation |
| 43 Katrina Road Redevelopment |
| Dracut High School Expansion |
| Town Hall Construction |
| Sewer Project Contract Number 30 |
| Sewer Project Contract Number 31 |
| Route 113 Retaining Wall |
| 970 Broadway Industrial Redevelopment |
| Combined Sewer Overflow (CSO - Phase 1A) |
| Tanner Street Area Initiative |
| Neighborhood Business Center Improvements |
| Downtown Improvements |
| Upper Merrimack Traffic Calming & Street Improvements |
| Tewksbury Master Plan |
| Stormwater Improvement Plan |
| Water Treatment System Assessment and Upgrade |
| Water Distribution System Improvements |
| Tyngsborough Old Town Hall Renovation |
| Affordable Housing at Red Pine Terrace |
| Cornerstone Square |
| Boston Road Affordable Housing Development |
| Minot's Corner / Route 110 reconstruction |
| University Avenue (Textile) Bridge |
| Workforce Training Fund Program |
| Greater Lowell Technical High School |

DROPPED PROJECTS:

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|-------------------------------------|
| Manley Brook Restoration |
| EDA Economic Adjustment application |

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PROPONENT

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|--------------------------|
| Town of Billerica |
| Town of Billerica |
| Town of Chelmsford |
| Town of Dracut |
| Town of Dracut |
| Town of Dracut |
| Town of Dracut |
| Town of Dracut |
| Town of Dunstable |
| Town of Dracut |
| City of Lowell |
| City of Lowell |
| City of Lowell |
| City of Lowell |
| City of Lowell |
| Town of Tewksbury |
| Town of Tewksbury |
| Town of Tewksbury |
| Town of Tewksbury |
| Town of Tyngsborough |
| Town of Tyngsborough |
| Town of Westford |
| Town of Westford |
| Town of Westford |
| MassDOT |
| GLWIB |
| Regional School District |

PROPONENT

| |
|--|
| Town of Tewksbury |
| NMCOG (Received EDA Planning Assistance grant) |

D. MAJOR REGIONAL PROJECTS

The Major Regional Projects section provides a brief narrative on fifteen significant projects in the region. These projects have been included in more detail due to their significant impact upon the region's economy and their importance to each of the Greater Lowell communities. In the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*, the major development projects were the Hamilton Canal, Lowell Junction, District Local Technical Assistance projects, Tyngsborough Town Center Revitalization, Downtown Lowell Renaissance Plan, Pepperell Paper Mill Site Redevelopment Project, Middlesex Turnpike Corridor Development and Woburn Street Corridor.

The major regional projects for 2013 are the Middlesex Village/Wood Street – Rourke Bridge Study, Tewksbury Master Plan, Hamilton Canal, Hamilton Crossing, Tanner Street Initiative, Middlesex Turnpike, five Corridor Studies, MassWorks projects, the Chelmsford and Dracut Town Center Studies and UMass Lowell projects. The completion of these major projects will move the Greater Lowell region closer to the vision outlined in the 2009 Five-Year CEDS. This section now also recognizes the strategic importance of UMass Lowell to the region's economy and outlines several major development projects currently underway, recently completed or programmed for the near future. The other major regional projects contribute in their own way to the economic vitality of individual communities through major infrastructure improvements and technical assistance, which result in a stronger regional economy.

1. Regional Strategic Plan and Master Plans

a. Middlesex Village/Wood Street – Rourke Bridge, Wood Street and Drum Hill Road corridor and feasibility study

Rourke Bridge, Wood Street, Westford Street and Drum Hill Road Corridor and Feasibility Study was recently completed through a collaborative effort involving the Northern Middlesex Council of Governments, MassDOT, and the communities of Lowell, Chelmsford, Dracut and Tyngsborough. The main focus of the study was to determine whether replacing the temporary Rourke Bridge with a permanent structure is feasible, and to develop a series of recommendation to relieve traffic congestion and improve mobility for area residents and businesses. The recommendations outlined in the report will enhance economic development opportunities along the regional transportation corridor, and improve multimodal regional connections between important centers of economic activity.

An initial screening evaluation was performed to assess the viability of numerous river crossing alignments. Five alternatives were retained for an in-depth analysis at the conclusion of the screening process:

- Alternative 2-This alternative maintains the existing alignment and expands the capacity of the bridge from two travel lanes to four;
- Alternative 4- The Western Bypass alignment includes the construction of a four-lane bridge to the immediate west of the existing structure;
- Alternative 5 – The Western Bypass with Grade Separation alignment would create a four-lane bridge to the west of the existing structure. Unlike Alternative 4 which would

intersect Pawtucket Boulevard at-grade, this alignment would cross Pawtucket Boulevard using a flyover with a ramp system that would touch down on Old Ferry Road;

- Alternative 6- The Skewed Bypass Alignment would create a four-lane bridge that crosses the river at an angle to the west of the existing bridge, with the northern approach of the bridge forming a four-way intersection with Old Ferry Road and Pawtucket Boulevard.
- Alternative 7- The Western Relocation Alignment would be located one mile to the northwest in the Vinal Square area of Chelmsford. This four-lane alignment would necessitate significant traffic improvements within Vinal Square itself, in order to establish a connection to Route 3 via Route 40. In addition, this alternative would result in a reduction in traffic volumes along Drum Hill Road, Westford Street and Wood Street, which could negatively impact businesses along those roadways.

Preliminary cost estimates were developed for each alternative which ranged from \$54.5 million to \$82.4 million. Alternative 7 was ultimately dismissed from further consideration given the magnitude of environmental impacts, as well as the potential impacts on traffic operations and historic resources within Vinal Square. The Lowell City Council voted to dismiss Alternative 5 based on potential economic development impacts to an undeveloped parcel of land on the north side of the Merrimack River. The remaining alternatives (2, 4 and 6) will be carried forward into the environmental permitting process.

In addition to addressing the issue of river crossing capacity, this study also identified several non-bridge related transportation improvements that are needed throughout the area including:

- The lengthening of turn lanes at the intersections of Riverside Street and University Avenue, Riverside Street and VFW Highway, and Westford Street at Wood Street;
- The installation of signals at VFW Highway and Riverside Street, Westford Street at Stedman Street, and Westford Street at Technology Drive;
- Signal timing adjustments at Pawtucket Street at School Street; Pawtucket Boulevard at Rourke Bridge; and Princeton Boulevard at North Road;
- Signal coordination across the O'Donnell (School Street) Bridge, across the University Avenue Bridge, and along the Drum Hill Road corridor from Technology Drive to Drum Hill Square; and
- Access management along the Drum Hill Road corridor from Drum Hill Square to Parkhurst Road, and for the Middlesex corridor from Wood Street/Rourke Bridge to Pawtucket Street.

As a result of this study, the need to replace the temporary Rourke Bridge with a larger, permanent structure has been confirmed and documented from a transportation and economic development perspective. Future traffic volume projections show that a four-lane bridge is required to meet existing and future demand. Advancing this project through the environmental permitting process, design and construction will require collaboration and coordination among the communities, NMCOG, MassDOT, FHWA and other state and federal permitting agencies.

b. Tewksbury Master Plan

NMCOG is currently assisting the Town of Tewksbury with the update of its Master Plan. The document was previously updated in 2003, and outlines long-term policy recommendations for the community's physical development, and details implementation strategies that address land use, transportation, the local economy, housing, environmental protection, and municipal services. The Master Plan is one of the main policy tools utilized by the Board of Selectmen, Planning Board, Zoning Board of Appeals, Conservation Commission, the Community Development Department, and other local decision makers.

The following four goals have been formulated to guide the development of the Plan, based on input provided through the public visioning process:

1. **Land Use and Zoning:** Promote a coordinated approach to land use that minimizes conflicts between zoning districts and impacts to neighborhoods, and maximizes high quality design, energy efficiency and sustainability.
2. **Economic Development:** Give preference to reuse and redevelopment over the development of Greenfields, and encourage businesses that create a diverse economic base, bring employment opportunities and grow the tax base.
3. **Transportation:** Improve the town's existing transportation network by addressing congestion and safety issues, expanding transit opportunities, and encouraging the development of bicycle and pedestrian facilities and amenities.
4. **Housing:** Provide diverse and affordable housing opportunities for all Tewksbury residents, accommodating all income levels, age groups, needs and disabilities.

The economic development section of the Master Plan provides an economic statistical profile of the community, and contains a detailed discussion of existing economic and business activities within the community. Community assets and liabilities are described, infrastructure needs are analyzed, and future potential economic development opportunities are assessed. The need to strike a balance between economic growth and quality of life is stressed throughout this section of the Plan. Planning for economic growth is essential in that it generates the local tax revenues needed to support municipal services, and provides support services and contracting opportunities for local businesses, which in turn supply and sustain employment opportunities for residents.

It is expected that the Master Plan process will be completed in 2014. The final Plan will contain many economic development recommendations that the Town can implement over the next decade. The Town has already begun to focus on creating an active economic development program to attract and retain business, utilizing measures that balance growth and quality of life.

2. Hamilton Canal

The City of Lowell issued a solicitation for a master developer to design, entitle, market and develop the Hamilton Canal District (HCD), a 13-acre underutilized and vacant site bordered by Jackson Street, Revere Street, Middlesex Street and Dutton Street. The site is located at the confluence of three canals: the Hamilton, Merrimack and Pawtucket Canals, and has been designated by the Commonwealth of Massachusetts as a Priority Development Site under Chapter 43D, a Growth District, and a Chapter 40R/Smart Growth District. The HCD development district is part of the Jackson/Appleton/Middlesex Urban Renewal Plan district, as amended in 2008.

Following a two-phase qualification process, the Trinity Hamilton Canal Limited Partnership team was selected as the master developer for the site. Through an extensive master planning process, a transit-oriented, mixed-use development plan was created that will enhance the tax base, strengthen and diversify the local economy, and create additional employment and housing opportunities for area residents.

Upon completion, the total project build out will be approximately 1.8 million square feet, and will include 425,000 sf of commercial space, up to 50,000 sf of retail space, up to 725 mixed-income housing units, additional parkland, and a parking garage. In addition, the Commonwealth of Massachusetts is developing a comprehensive justice center comprised of sixteen court rooms on an adjoining parcel, although this project is not considered part of the Hamilton Canal project.

The City of Lowell and the Northern Middlesex region will realize the following significant benefits from the project:

- Revitalization of a 13-acre underutilized and neglected site, located directly adjacent to Downtown Lowell, into a mixed-use development featuring housing, office space, retail uses, restaurants and other commercial development;
- An estimated \$800 million in new investment in an area that has not seen any significant reinvestment in decades;
- Creation of up to 1,000 jobs (400 full-time and 600 temporary construction jobs), and an increase in state and local tax revenues;
- The creation of up to 725 units of affordable and market rate housing;
- The project's proximity to the Gallagher Transportation Terminal supports and enhances the use of public transportation;
- The proposed extension of the trolley system will augment transportation within the development district and the downtown area;
- New canal crossings and roadway improvements that enhance pedestrian and vehicular access;
- The adaptive reuse and historic preservation of a large mill complex; and
- Energy savings through Green building design.

The City of Lowell received \$2,000,000 in Investment Assistant funding from EDA for the construction of a new permanent Revere Street Bridge. The new Revere Street Bridge was necessary to allow construction equipment to access the Hamilton Canal site and is key to the success of the project. The improvements made through the grant have supported the completion of Phase I of the Hamilton Canal District, which consisted of the rehabilitation of three existing historic mill buildings contained within the Appleton Mills complex and the revitalization of the Freudenberg Building (also known as 110 Canal Street). Completed in Spring 2011, the Appleton Mills now contains 135 units of artist live/work style housing. The grant received from EDA also helped the proponent in leveraging other funding. This portion of the Phase 1 project was financed with State and Federal Historic Tax Credits purchased by MetLife Inc. for \$42 million, and the project received a \$1.6 million permanent mortgage and a \$34 million construction loan from MassHousing.

The Freudenberg Building/110 Canal Street has been redeveloped as a 50,000-square foot commercial office building, with the potential to accommodate up to 200 new well-paying jobs for office workers and professionals. Trinity Financial is currently seeking tenants for the recently completed \$14 million project.

The next stage of the Hamilton Canal Redevelopment Program calls for two new 50- to 70-unit residential buildings north of the Appleton Mills, and another office building with first floor retail space located next to the future courthouse.

3. Hamilton Crossing

The Hamilton Crossing project is a three-phased mixed use development located in Lowell's Jackson-Appleton-Middlesex Urban Revitalization and Development Area, known as the JAM area. The project originally was undertaken through a partnership established between the Architectural Heritage Foundation and the Banc of America CDC. The partnership owned three buildings that were once part of the Hamilton Manufacturing Company's textile mill complex.

The first phase of the project included the rehabilitation of 101-161 Jackson Street, formerly 26 Jackson Street. The western portion of the project is Mill #6, the six-story, 190,000 square foot building. The building was purchased by Lowell Community Health Center (LCHC), which renovated 100,000 square feet into high quality medical office space as its new headquarters. This new facility, which was completed in 2011, has allowed LCHC to consolidate all related clinical services and administrative offices from six separate sites, serve 10,000 additional patients each year, and hire an additional 100 employees.

The \$42 million project has increased the size of LCHC's footprint from 42,000 square feet to 100,000 square feet. In order to undertake a project such as this, LCHC relied on multiple funding sources, including New Markets Tax Credits (NMTC), Federal Historic Tax Credits (FHTC) and Federal construction guarantees, and a \$9.3 million Facility Improvement Program (FIP) grant from the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services.

Five million dollars (\$5 million) in FHTC was purchased by U.S. Bancorp Community Development Corporation (USBCDC). USBCDC also purchased the NMTCs. Because FHTC equity comes into a project at completion, Eastern Bank provided bridge financing to be repaid

by FHTC equity upon completion. Seven million dollars (\$7 million) was realized from the sale of the NMTCs. Two Community Development Entities (CDEs) provided allocations of NMTCs and served as lenders for this project; one was controlled by the Massachusetts Housing Investment Corporation (MHIC) and the other by NCB Capital Impact (NCB). A \$10.2 million leverage loan from Eastern Bank in connection with the NMTC transaction was guaranteed in part by HRSA. A \$4 million direct loan from Eastern Bank to the project was also guaranteed in part by HRSA. This was the first project in the country to have two separate HRSA guarantees.

LCHC is currently developing mixed use plans for the future rehabilitation of the remaining 90,000 square feet in Mill #6.

A next phase of the Hamilton Crossing project will include the redevelopment of 165 Jackson Street, formerly the Hamilton Manufacturing Company's Counting House and Storehouse. This 88,000 square foot building will be converted into fifty-two, mixed-income loft-style apartments and 8,000 square feet of medical office space. The project has been awarded affordable housing program funds from the Massachusetts Department of Housing and Community Development (DHCD). Construction will be underway during the 1st quarter of 2014.

Architectural Heritage Foundation and the Banc of America CDC still own Mill # 4 located at 71 Jackson Street. Plans for reuse are pending the outcome of marketing efforts, design, permitting and financing. Conversion to rental housing is the most likely end use.

4. Tanner Street Initiative

In 2010 the City of Lowell was awarded a Brownfields Area-wide Planning Grant from the U.S. Environmental Protection Agency (EPA) to complete a district-wide plan for the Tanner Street area, also known as the Ayer's City neighborhood. The project focused on establishing a vision for the district aimed at improving economic opportunity, creating jobs, and addressing environmental quality and public health. The Tanner Street Initiative was also established as a primary component within NMCOC's EDA Planning Grant, including active participation on the Community Advisory Committee (CAC) and attendance at the three public meetings.

The 111-acre area addressed through the Tanner Street Initiative is comprised of a mix of heavy industry and residential uses. There are several known Brownfields, including one National Priorities List (Superfund) Site known as the Silresim Chemical site. Groundwater from the Silresim site has affected nearly 16 acres in the Tanner Street area, while soil contamination extends for nearly 7 acres. An active cleanup program is underway, and indications are that the eastern portion of the site could be ready for redevelopment within the next two to three years.

The recommendations developed through the Tanner Street Initiative are intended to transform the area economically by encouraging new clean industries that create jobs and generate tax revenues, and implementing actions that improve the environment through increased multi-modal transportation options and enhanced access to natural resources. Overall, the recommendations identified within the Plan include the following:

- Brownfields clean-up and redevelopment;
- Establishing programs to support and enhance existing businesses, and attract new businesses to the area;

- Construction of more than 300,000 square feet of new development that will generate \$1.38 million in additional tax revenues;
- The installation of new parks and a new greenway;
- Improved multimodal transportation access and enhanced vehicle and pedestrian circulation;
- Streetscape improvements; and
- New zoning to enhance and encourage redevelopment of vacant and underutilized properties.

Implementation of the Plan is expected to take ten to twenty years and will require the cooperation of private developers. It is the City's intent to use the area-wide plan as the basis for designating the Ayer's City industrial district as an Urban Renewal area, through the Massachusetts Department of Housing and Community Development (DHCD) under Massachusetts General Law Chapter 121B. Once the Urban Renewal designation is approved, the City will have access to additional economic development tools and state funding programs.

The Urban Renewal designation will allow the City to undertake the following activities:

- Planning;
- Establishment of design and rehabilitation standards;
- Acquisition of land, including the use of eminent domain;
- Assembly of land into developable parcels;
- Relocation of businesses and residences;
- Demolition or rehabilitation of structures;
- Improvements to infrastructure;
- Issuance of bonds and borrowing; and
- Receive grants and loans

Among the key financing recommendations within the Plan is the use of District Improvement Financing (DIF) and the EDA Public Works grant program, as potential funding sources for infrastructure improvements. The DIF program allows municipalities to fund public works, infrastructure and development projects by allocating future, incremental tax revenues collected through a defined district. This municipal investment is used to stimulate private investment in the area, which in turn increases the value of property and generates additional tax revenues.

5. Middlesex Turnpike Corridor Improvements

The Middlesex Turnpike connects the communities of Billerica, Bedford and Burlington and is a significant regional economic center and home to several major international and national companies. Transportation improvements along the corridor will improve access to these firms, and are vital to attracting and maintaining employees, accommodating the needs of commuters, and facilitating the transport of goods along the corridor. The Middlesex Turnpike provides

direct access to I-95 (Route 128) and to U.S. Route 3, and many of the firms along the corridor rely on just-in-time delivery of goods.

The Massachusetts Executive Office of Housing and Economic Development has targeted this area for future economic growth and expansion, approving Priority Development Sites along the corridor within the Towns of Billerica and Burlington. This area has seen the relocation and expansion of several high tech and life sciences firms such as Anika Therapeutics, Inc., and EMD Serono. Even more significant is the established working relationship among the towns of Billerica, Bedford and Burlington. Each of these communities have been approved as Economic Target Areas (ETAs) and work closely together on economic development projects of regional significance. The communities meet frequently to address municipal service and infrastructure needs that enable private companies to grow and to locate along the Middlesex Turnpike.

The Middlesex Turnpike project is divided into three phases as follows:

- Phase I: Crosby Drive and Middlesex Turnpike improvements, including roadway widening and intersection improvements from 375 feet north of Route 62 to the Crosby Drive/Middlesex Turnpike intersection in Bedford. The Phase I project was completed in 2007 at a total cost of \$9,500,000.
- Phase II: includes full depth reconstruction and intersection improvements along the Middlesex Turnpike and the Mitre Extension, from the intersection of the Mitre Extension and Route 62 to 800 feet north of the intersection of Plank Street/Middlesex Turnpike/Crosby Drive, a distance of 2.08 miles. The project is currently under construction and is expected to be completed in the summer of 2014, at an estimated cost of \$13.5 million.
- Phase III: includes improvements to 1.6 miles of the Middlesex Turnpike from the northern terminus of Phase II to 1,000 feet north of Manning Road in Billerica. Left-turn lanes and signals will be constructed at high volume intersections and driveways. The twin pipe arch culverts at the Shawsheen River will be reconstructed, and retaining walls installed to minimize impacts to the adjacent resource areas. Full depth pavement, new drainage and a stormwater management system will be installed, along with new waterline and new state-of-the-art traffic signal hardware. The total estimated project cost is \$22,000,000. Currently, the project design is 75% complete.

The Phase III project has tremendous economic development benefits. The Town of Billerica has designated a priority development site at 45A Middlesex Turnpike. This site is within the targeted economic development Tri-Town area of Billerica, Bedford and Burlington. With the investment to date of more than \$23 million in earlier phases of the Middlesex Turnpike and \$350 million in the expansion of Route 3, the state and federal governments have recognized the importance of this area in attracting high tech and biotech companies, and in generating well-paying jobs for the regional workforce. It is anticipated that the Middlesex Turnpike Phase III project will create 150 construction jobs.

6. Corridor Studies

a. Woburn Street Corridor Study

NMCOG has assisted the communities of Billerica, Lowell and Tewksbury in examining land use, transportation and economic development issues along the Woburn Street/Billerica Avenue corridor, with an eye toward addressing land use conflicts and identifying opportunities where the communities can work together to promote the corridor for economic development and plan for the future. The Woburn Street/Billerica Avenue Corridor Study Area spans a distance of approximately 1.75 miles, and begins north of the I-495 interchange, at the intersection of Easton Street/Gaudreau Street in Lowell, and extends southeasterly along Woburn Street and Billerica Avenue, through the towns of Tewksbury and Billerica, terminating at the intersection of Mount Pleasant Street in Billerica.

Future development and redevelopment within the study area will depend on the uses allowed under each community's zoning bylaw or ordinance, the availability of adequate infrastructure and overall market conditions. The corridor is nearly built-out and there is little vacant land available. However, the redevelopment of existing and underutilized parcels will provide future economic development opportunities, particularly within the communities of Billerica and Tewksbury.

Within Tewksbury, there are only four (4) parcels of undeveloped land totaling 7.88 acres. The largest parcel is 3.06 acres in size and abuts the Billerica town line. The other three (3) parcels have frontage on Woburn Street and are contiguous lots totaling 4.82 acres and are north of the access road to the former Raytheon building.

There are eight (8) parcels comprising 84.10 acres that are considered to be underutilized. The Billerica Business Center, which is located on the Tewksbury town, line has five (5) parcels consisting of 30.72 acres. The Business Center is currently facing an extremely high vacancy rate and holds significant opportunities for economic development. There are five (5) commercial buildings, which are zoned for industrial uses. Further to the west, the former Raytheon building parcel (30.84 acres), including the front parking lot (13 acres), represents a significant redevelopment and development opportunity that will require a cooperative and collaborative working relationship between the three communities.

A number of recommendations were developed for addressing economic development issues, land use, and infrastructure needs within the study area, as outlined below:

- Modify zoning to allow for additional commercial support services that meet the needs of office and industrial uses;
- Address potential conflicts between industrial and residential uses through down zoning, transitional zoning and/or the use of an overlay district;
- Improve the quality of development through the use of design guidelines;
- Focus on the development opportunities related to the former Raytheon site and the Billerica Business Center properties;

- Work with the Greater Lowell Workforce Investment Board (GLWIB) and the Career Center in Lowell to match prospective employees with available positions. Utilize the workforce development incentives available through the GLWIB;
- Utilize the Economic Target Area (ETA) status to develop Tax Increment Financing (TIF) agreements with prospective businesses. Establish an Economic Opportunity Area (EOA) on the Tewksbury side of the former Raytheon plant to complement the EOA on the Billerica side of this site;
- Work with NMCOG to address Brownfield and petroleum contamination issues at the former Raytheon site, the former Corenco Corporation site and railroad tracks abutting the parcels in the study area. Access Brownfield funds from MassDevelopment as a result of the ETA designation;
- Work with the Town of Billerica to address the permit streamlining issues across municipal jurisdictions;
- Encourage commercial development opportunities that would address the consumer needs of employees and residents in the target area;
- Alternative transportation options should be offered as way to improve traffic operations along the corridor. Such strategies should include alternative work schedules and ridesharing programs, as well as improved transit options and improved accommodations for non- motorized forms of travel;
- Install a fully actuated traffic signal system at the Woburn Street/I-495 southbound ramps and add a left turn lane for movements from Woburn Street to the I-495 southbound ramp;
- Install a fully actuated traffic signal system at the Woburn Street/I-495 southbound ramp, and construct an exclusive left turn lane for Woburn Street turning movements to Christman Avenue;
- Install a traffic signal on Woburn Street at Riverview Commerce Center driveway, upon occupation of the now largely vacant office park;
- Future build out of the Billerica Business Center will result in increased traffic delays. Traffic conditions should be monitored until such time as installation of a traffic signal is warranted; and
- At the intersection of Billerica Avenue at Mount Pleasant Street, an exclusive right turn lane on Billerica Avenue and an exclusive left turn lane for eastbound Mount Pleasant Street should be installed, along with a fully actuated traffic signal system.

b. Route 38 Corridor Study (Tewksbury)

The Route 38 corridor, known as Main Street in Tewksbury, runs in a northwest-southeast direction across the entire length of town, roughly parallel to the old Boston and Maine railroad leg that terminates at the Lowell/Tewksbury line near I-495. Land within the 6.3 mile corridor is predominately zoned for commercial (270 parcels) development, however the corridor includes several parcels that are zoned for industrial (51 parcels), residential (86 parcels), multi-family (8 parcels), transitional (14 parcels) and municipal (2 parcels) uses. The Commercial zoning district is a commercial strip that runs the entire length of the Corridor, except for small pockets

of other zoning districts described above. Residentially zoned land is fragmented throughout the corridor, while a significant amount of industrially zoned land can be found around the I-495 interchange.

NMCOG has undertaken a corridor study to identify appropriate strategies for improving travel and safety conditions along the corridor. The results of the study will assist the Town in making informed decisions regarding land use and development, based on the capacity of the roadway and projected operating conditions along the corridor. The Route 38 corridor traffic study is being conducted to:

- assess current operating and future operating conditions along the corridor;
- define the development thresholds at which it becomes necessary to implement specific levels of traffic mitigation in order to accommodate anticipated development; and
- project traffic conditions along the corridor over twenty years, based on high, medium and low development scenarios.

Commercial areas along the corridor consist mostly of strip developments with multiple roadway access points, which create conflicts for vehicles trying to enter and exit. The potential exists for substantial increases in traffic volumes based on the traffic generated from future development. Full build out of underdeveloped and vacant properties has the potential to generate several thousand additional trips per day, creating significant impacts along an already overburdened corridor.

The Corridor Study will be completed in early 2014 and presented to the Town and MassDOT. Following completion of the study, NMCOG will continue to work with the Town and the state to implement the recommendations outlined. Such improvements will be needed to accommodate future growth and economic development along the roadway, and to address existing safety concerns.

c. Route 133 (Tewksbury) Corridor Study

Route 133 (Andover Street) traverses the northern section of Tewksbury, from the Lowell line to the Andover line. The corridor provides access to I-495 and I-93. The section of Route 133 in the vicinity of the I-495 interchange is an important economic center for the Town. Significant high technology and defense contracting companies are located in this area, along with commercial support services, and highway-oriented businesses, including restaurants, service stations, and hotels.

NMCOG is assisting the community in evaluating land use and zoning in the area surrounding the interchange, with the objective of accommodating additional business opportunities and supporting the needs of the companies already located in this area. The Town is assessing whether to allow additional commercial services that would meet the needs of workers and residents within the study area's zoning districts, and evaluating whether there is a need to modify zoning designations for certain parcels.

Recently, Penn National Gaming, based in Wyomissing, Pennsylvania, proposed to site a \$200 million slots parlor on 30 acres off Ames Pond Drive, near the Interstate 495/Route 133 interchange. Town Meeting voters did not approve the rezoning required for the project. The

Town has initiated discussions about the most appropriate uses for the parcel in the future. As part of this effort, NMCOG is assisting the Town in assessing the feasibility of creating a lakefront zoning bylaw in the Ames Pond area. The purpose of the bylaw would be to encourage water-oriented recreational, commercial and mixed-use development opportunities.

d. East Street Corridor (Tewksbury)

NMCOG worked with the Town of Tewksbury to investigate land use and economic development issues along the East Street corridor, from Route 38 to the Andover line. The purpose of the study was to examine land use conflicts along the corridor, identify opportunities for future economic development, and outline steps for addressing existing and future conflicts between business and residential uses.

The section of East Street extending approximately .8 miles from the Tewksbury/Andover line includes three areas where significant land use conflicts are evident. There is also another area of conflict located along Carter Street, close to the intersection with East Street. These conflicts are principally due to the fact that the north side of East Street is zoned residential uses while the south side is zoned business/industrial.

There is land available for future development on the southern side of East Street, approximately .3 miles from the Tewksbury/Andover line. This area is zoned for heavy industrial, and could potentially accommodate industrial uses, provided that substantial buffering is provided along East Street to protect the single-family homes directly across the street.

An extensive industrial/business cluster is also found near the East Street/Industrial Avenue intersection. NMCOG staff evaluated possible options for new development and redevelopment opportunities in this area and recommended that small office uses, neighborhood-based commercial, and commercial/residential mixed-use be considered for this area, in order to minimize the impacts to single-family homes located nearby on East and Carter Streets. Office and light-industrial uses are still appropriate for areas directly bordering East and Carter Streets in those locations where residential uses would not be impacted.

In addition, the study found that a continued emphasis on industrial uses is appropriate for the areas north of the Industrial Avenue/East Street and Carter Street/East Street intersections. A transition zone, buffering the industrial uses from the residential uses directly lining East and Carter Streets, has been recommended. The transition zone may consist of a mix of office, neighborhood commercial, and professional service type businesses.

In addition to the work undertaken by NMCOG, the Town hired a transportation consultant to design improvements along the East Street corridor. Significant volumes of traffic use East Street to access local businesses and to access U.S. Interstate 93. New traffic signals have been installed at the intersection of East Street and Livingston Street. Prior to these improvements being put into place, this intersection was on the region's High Crash Intersection List.

e. Minot's Corner/Route 110 Traffic Improvements

The purpose of the Minot's Corner/Route 110 Traffic Improvement Project is to enhance vehicular, bicycle and pedestrian movement and safety along the Route 110 corridor. The project will provide a consistent roadway cross-section and improved intersection geometry along the

Town's primary business corridor. Under current conditions, traffic operations at Minot's Corner are poor during the peak hours due to high traffic volumes and the inability of the roadway geometry to process the traffic flow. The proposed project will increase the roadway capacity and address operational deficiencies in support of future economic development.

The project is now under construction and includes geometric improvements to the roadway cross-section, and reconstruction and widening of existing pavements. Based on existing traffic and future traffic projections along the corridor, an additional travel lane will be added in each direction on Littleton Road (Route 110) from Minot's Corner to Nixon Road. The new cross section will consist of two through lanes in each direction with a center turning lane. At Minot's Corner, a second through lane will be added to Littleton Road (Route 110) eastbound to match the wider cross-section beyond Boston Road. Traffic projections for the full-build out of the project corridor indicate the possible need for a third left turn lane on Littleton Road (Route 110) eastbound. Therefore, the new cross section on this leg of the intersection will be sufficiently wide to support two through lanes in each direction with three left turning lanes (seven lanes total). Since the need for the third left turn lane is not immediate, the northern left turn lane will be a painted median. This will allow the required roadway widening to be built and the right-of-way acquired now so that in the future, when the three left turn lanes are warranted, only the paint in the median will be removed.

Two additional lanes will be added to Boston Road, one that can be converted to a receiving lane for the three left turn lanes from Littleton Road (Route 110), and the second to provide for double left turn lanes onto Littleton Road (Route 110). The proposed project includes milling and overlay of existing pavements; full-depth reconstruction in areas of roadway widening; installation of vertical granite curb and a 4- to 6-foot concrete sidewalk adjacent to the shoulder on both sides of the roadway; new signs and pavement markings; and traffic signal system replacements.

The \$4.7 million investment in transportation infrastructure improvements along Route 110 will help encourage targeted commercial investment through development projects. The increased roadway capacity will improve access to the many retail and commercial businesses that line the project corridor, such as the recently completed Cornerstone Square and future phases of Westford Technology Park West.

7. MassWorks projects

In 2010 the Patrick Administration decided to combine several state infrastructure programs into the MassWorks Infrastructure Program, which would provide "a one-stop shop for municipalities and other eligible applicants seeking public infrastructure funding to support economic development". The Administration felt that this new program would reduce the burden on municipalities and improve government efficiency at the state and local levels. The MassWorks program represented a consolidation of the following six programs:

- Public Works Economic Development (PWED) Grants;
- Community Development Action Grant (CDAG);
- Growth District Initiative (GDI) Grants;
- Massachusetts Opportunity Relocation and Expansion Program (MORE);

- Small Town Rural Assistance Program (STRAP); and
- Transit Oriented Development (TOD) Grant Program.

The MassWorks Infrastructure Program is designed to provide competitive grant funding for “publicly owned infrastructure including, but not limited to sewers, utility extensions, streets, roads, curb-cuts, parking facilities, site preparation, demolition, pedestrian walkways, streetscape, and water treatment systems”. This program is centrally administered by the Executive Office of Housing and Economic Development (EOHED), in cooperation with the Department of Transportation (MassDOT) and the Executive Office for Administration and Finance (EOAF).

Given the need for infrastructure improvements in the Greater Lowell region, the MassWorks program represents an opportunity to secure additional state funds to move important private sector projects forward. However, given the demand for infrastructure funding statewide, the competition for these grants is quite high. During the first year of funding, there were eight (8) MassWorks applications submitted by Greater Lowell communities. These projects are identified below and include the MassWorks project funding requests:

- Town of Billerica – Middlesex Turnpike/Adage Pump Stations Upgrades - \$ 948,500;
- Town of Chelmsford – Infrastructure Assistance for Kronos to Expand - \$475,000;
- City of Lowell – 110 Canal Street Development (Hamilton Canal) - \$ 5,434,000;
- City of Lowell – Downtown Lowell Transportation Evolution Program - \$ 5,000,000;
- City of Lowell – Rivers Edge Development - \$ 4,500,000;
- Town of Pepperell – Water Main Upgrades - \$ 1,397,400;
- Town of Westford – Bruce Freeman Rail Trail Extension - \$ 164,450; and
- Town of Westford – Minot’s Corner Project Enhancements - \$ 554,000.

The Executive Office of Housing and Economic Development funded two of these projects: the Town of Chelmsford’s Infrastructure Assistance for Kronos to Expand and the City of Lowell’s Rivers Edge Development.

During the 2012 MassWorks competition, only three applications were submitted by the Greater Lowell communities as follows:

- Town of Billerica – Town Center Traffic, Roadway and Streetscape Improvements – \$ 3,610,000;
- City of Lowell – Lord Overpass Modernization and Jackson Street Extension – \$ 5,000,000; and
- City of Lowell – Downtown Lowell Transportation Evolution Program - \$ 800,000.

None of these projects were funded by EOHED under MassWorks, although the Administration was planning to make a grant announcement related to the Lord Overpass project by 2014.

During the 2013 MassWorks competition, only three applications were submitted by the Greater Lowell communities as follows:

- Town of Chelmsford – Chelmsford Woods Affordable Housing Water Infrastructure – \$ 974,480;
- City of Lowell – Hamilton Canal District: Phase II Public Infrastructure - \$ 1,500,000; and
- Town of Westford – Route 110 & Tadmuck Road Intersection and Signal Improvements- \$ 2,040,000.

None of these projects was funded under the 2013 MassWorks program.

8. Town Center Studies

a. Chelmsford

Chelmsford Center, also known as Center Village, is located at the confluence of State Routes 129, 110, 4 and 27. The area is comprised of municipal uses, automobile-oriented commercial retail establishments, smaller-scale village-style businesses, including specialty retail and restaurants, and professional offices and services. To remain economically viable and current, the Town has embarked on a number of planning initiatives focused specifically on building upon recent investments made by the Massachusetts Department of Transportation (MassDOT) and others.

In 2004, MassDOT reconstructed the roadway network within the Center and installed new sidewalks, granite curbing, landscape enhancements and streetscape improvements. In 2009, the Bruce Freeman Rail Trail officially opened, providing enhanced connections to the Center for bicyclists and pedestrian. Recently, the Central Square Utility Project, a multi-year to relocate overhead utility lines underground, was initiated. To date, utility lines have been buried in the area around Center Common.

The Town has utilized Community Preservation Act funds to restore the 1872 town-owned clock and the steeple of the historic First Parish Church on Westford Street. The community also used CPA monies to restore and renovate the former Town Hall on North Road, which was originally built in 1879 and is now the Chelmsford Center for the Arts. The project included renovations to the auditorium and the addition of artist studio and gallery space.

Over the past year, the Town retained the Cecil Group to create a vision for the Center. Simultaneously, NMCOG staff completed an analysis of parking, bicycle and pedestrian facilities within the area. The recommendations outlined in the Cecil Group report include the installation of additional mid-block crosswalks and pedestrian signals within the area, the construction of a walkway along Beaver Brook, improved directional signage, and the establishment of shared parking facilities among private property owners. In addition, the report recommendations call for streetscape improvements along Chelmsford Street between Fletcher Street and Route 129, completion of the sidewalk network within the Town Center, adding additional on-street parking along Chelmsford Street, and permanently securing municipal parking which is now leased by the Town on a short-term basis.

As part of NMCOG’s study, businesses within the Center were surveyed to assess how parking supply, availability and parking location impact business operations within the area. One of the most significant issues identified by area businesses is that customers and clients are unaware of where public parking areas are located due to a lack of overall signage. In addition, pedestrian and bicycle access within the area is inadequate in many locations.

As a result of the input from the business community, the main recommendations outlined in the NMCOG report focus on improving parking, bicycling and pedestrian travel within the Center and include the following:

- Construct informational and directional signs within the Town Center to provide information on parking locations, and on how to best access the business, service and cultural destinations within the area;
- Install bicycle lanes, sharrows and “share the road” signs along Littleton Road, North Road, Billerica Road, Summer Street, Acton Road and Boston Road;
- Improve sidewalk conditions and address ADA compliance issues in the area around the Center Common, complete the sidewalk network along Littleton Road, and add additional crosswalks at appropriate locations; and
- Develop the town-owned property behind Town Hall for municipal parking.

Over the next five years, the Town will focus on implementing many of the recommendations outlined above. Reinvestment in the Town Center is already moving forward with the redevelopment of the former Stop and Shop/Marshall’s Plaza on Boston Road. Winstanley Enterprises recently purchased the 8.5-acre parcel and will soon begin renovating the property. To date, three new tenants have been identified, including a fitness center, a restaurant and a hair salon. In addition, two of the existing tenants have signed fifteen-year lease extensions.

b. Dracut

Dracut Town Center encompasses the Town Hall, the library, and other public and private building sites, located in the vicinity of Route 38, Arlington Street, and Broadway. The Town’s Master Plan discussed the need to strengthen the Town Center in order to establish a distinct identity as the civic, cultural and economic heart of the community, and provided the following goals and objectives relative to the Town Center:

- Preserve the town’s neighborhoods;
- Explore measures that promote the creation of a town center;
- Preserve the community’s cultural and historic resources;
- Business cultural and governmental uses will benefit from a cohesive Town Center design that includes landscaping, parking, traffic circulation and other amenities;
- Carefully integrate new or expanded housing into existing districts and neighborhoods so that it is not physically or environmentally disruptive to the existing scale or style;
- Strengthen the town center with a concentration of municipal uses; and

- Promote neighborhood-scale commercial uses as an important component of the town center.

As discussed in the Master Plan, by creating an identifiable village center with pedestrian activities, traditional building form, mixed uses, and greater coherence of architectural treatment and design, community pride will be enhanced and future economic opportunities will be created.

The Town of Dracut is presently constructing a new 20,000-square foot Town Hall on Arlington Street, utilizing the parcel on which the existing Town Hall now sits plus two adjacent properties that the Town purchased in June 2013. (The current town hall, which dates to 1893, will be demolished.) The construction of a new town hall will enable the Town to adhere to a consent agreement it reached after a 2005 federal court complaint for failing to provide adequate access for people with disabilities at the existing Town Hall and two other buildings that house town offices. In addition to providing accessibility, more space, and efficiency, the Town Hall project has also been a catalyst for other planning initiatives aimed at creating a traditional more traditional Town Center.

While the site of the Town Hall is close to several other community-oriented buildings, including Parker Memorial Library, a church, a grange hall, and Veterans Park, however the area has never had the character or feel of a traditional New England town center. The new Town Hall has the potential to serve as the focal point for a redeveloped Town Center that reflects the values and goals laid out in the community's Master Plan. Toward this end, NMCOG staff recently assisted the Town in drafting an overlay zoning bylaw to assist in creating a revitalized and vibrant Town Center.

The Dracut Center Neighborhood Overlay District (DCNOD) promotes the development of a pedestrian-oriented Town Center consisting of a diverse mix of residential, business, civic, institutional, educational and cultural uses. Infill development of underutilized and vacant properties is highly encouraged and recommended to spark investment and future economic growth. The DCNOD bylaw is intended to be used with specific design guidelines that were formulated to create a distinct sense of place and unique identity for the area. The Design Guidelines are intended to promote projects that contribute to the character of the community and that complement adjacent development, as reflected in the following design guideline goals:

- Enhance the Town Center as an area of civic, business and entertainment activity, while preserving and protecting its historic character and resources;
- Foster a pleasant pedestrian environment with amenities such as sidewalks, street trees, landscaping and businesses with attractive window displays;
- Create a unified appearance, a sense of place, and community identity;
- Reuse vacant and underutilized properties;
- Encourage a diverse mix of uses including residential, business, commercial, civic, educational, and cultural and entertainment activities for workers, visitors, and residents;
- Encourage live/work units such as apartments over first floor commercial uses;
- Provide diverse housing opportunities;

- Provide centrally located parking that encourages people to leave their cars and walk through the Town Center;
- Provide a consistent architectural scale and promote the historic nature and value of the Town Center;
- Provide adequate lighting to ensure safety and security;
- Encourage signage that is clear and at an appropriate scale for the Town Center; and provide a comprehensive sign program that is consistent for the Center area; and
- Attract new private investment to the area and foster economic development.

Dracut Town Meeting approved the DCNOD bylaw at its November 4, 2013 meeting, and the bylaw was subsequently approved by the Massachusetts Attorney General's office.

9. UMass Lowell Projects

Over recent years, the University of Massachusetts (UMass) Lowell has undergone major transformation through substantial investment in capital works projects. The development of new academic and research buildings; upgraded classrooms; libraries; laboratories; student dormitories and activity spaces; and parking facilities has occurred across the three campuses of the University. These major development projects provide enhanced education and employment opportunities for the region and more broadly contribute to the overall economic vitality of the region's member communities. At the same time, such major development projects have a direct impact on the revitalization of downtown Lowell, the quality of life of the city's residents and the City of Lowell's tax revenue.

COMPLETED PROJECTS

a. UMass Lowell Inn & Conference Center (ICC)

In 2009, UMass Lowell purchased the centrally located DoubleTree Hotel for \$15 million. The University spent \$7.6 million refurbishing the facility to create a combined residence hall and inn, which was completed in 2011. In 2013, 418 students reside at the UMass Lowell Inn and Conference Center (ICC). In addition, the Inn maintains 31 publicly available year-round rooms, which increases to 150 rooms in the summer.

b. Tsongas Center

In 2010, UMass Lowell acquired the Tsongas Center. The University refurbished and updated the Center at a cost of \$5 million, and by 2011 established a 7,800-seat arena that hosts more public events and more University-centered activities than ever before. In 2011 and 2012 attendance at concerts, sports and corporate events, entertainment events and graduations exceeded 240,000.

c. Mark and Elisia Saab Emerging Technologies and Innovation Center

The \$80 million Mark and Elisia Saab Emerging Technologies and Innovation Center (ETIC), located on the corner of University Avenue and the VFW Highway, opened in October 2012.

The 84,000-square-foot facility supports Research and Development in nano-manufacturing, nano-medicine, sensors and flexible electronics. The ETIC houses cleanroom spaces, laboratory space, and a plastics processing high-bay. The building achieved LEED Gold Certification and it is estimated that the project supported 130 new jobs during the construction phase¹⁴.

d. Health & Social Sciences Building

In April 2013, the \$40 million 69,000-square-foot Health and Social Sciences Building was opened. According to UMass Lowell, construction of the academic building supported more than 800 construction and related jobs. The new building provides classrooms, state-of-the-art laboratories and observation facilities, a demonstration hospital wing, and meeting spaces for student projects and community engagement.

e. University Suites

Recently opened in September 2013, the \$54 million University Suites building provides for the growing accommodation needs of the University. The residence hall houses 472 students, with a ground-floor common area comprising a café and multi-purpose room. The building achieved LEED Silver Certification.

f. Riverview Suites

Riverview Suites, a 173,000-square-foot \$42 million residence hall near South Campus, opened in September 2013. The building provides suite-style accommodation for 510 upperclassmen and also incorporates study and meeting spaces and an on-site fitness center. The University leases the property from Soho Development, who also built the facility.

g. North and South Campus Garages

The North and South Campus Garages were completed in fall 2012 and fall 2013 respectively. The two new garages have provided parking spaces for more than 1,300 vehicles.

PROJECTS UNDER CONSTRUCTION

a. University Crossing

Located at the center of the UMass Lowell campus on the former St Joseph's Hospital site, University Crossing, a \$95 million 230,000-square-foot student services center is under construction. The center incorporates a large bookstore, food court and event spaces, as well as administrative offices. UMass Lowell acquired the site in 2011 for \$6.3 million from the City of Lowell. University Crossing will provide an important link between the University's three campuses and downtown Lowell. The development will also be facilitated by completion of the

¹⁴ University of Massachusetts Lowell - <http://www.uml.edu/Facilities/Capital-Improvements/ETIC/About-ETIC.aspx>

\$32 million, state-funded Howe Bridge, which will connect Merrimack Street (and University Crossing) with University Avenue in early 2014.

FUTURE PROJECTS

a. Pulichino Tong Business Building

A new building proposed to house the Robert J. Manning School of Business is under design. The Robert J. Manning School of Business in the new Pulichino Tong Business Building will provide students with world-class business education facilities, including a trading room. Completion of the building is anticipated in 2016.

E. CEDS ACTION STEPS FOR 2014

NMCOG will continue to fulfill its partnership responsibilities with EDA during 2014 in collaboration with the other economic development stakeholders in the Greater Lowell region. As with this past year's activities, it remains the collective responsibility of all the economic development stakeholders to work with NMCOG to address the eight goals outlined in the *Greater Lowell CEDS for 2009-2013*. The overall CEDS Action Steps for 2014 to be implemented between January 1, 2014 and December 31, 2014 will be as follows:

Overall CEDS Planning Grant Objectives

1. Continue CEDS "grass-roots" planning process

- Schedule two (2) CEDS Committee meetings during the program year;
- Submit the final Economic Development District (EDD) application to EDA for approval as the Northern Middlesex Economic Development District, Inc. (NMEDD) by June 1, 2014;
- Apply for Short-Term planning funds from EDA by June 30, 2014 to develop the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2014-2018*;
- Develop a schedule for the Five-Year CEDS (2014-2018) within the EDA grant application;
- Complete the *Siting of Renewable Energy Facilities Study* by August 2014;
- Update the CEDS Priority Projects list based upon those projects that are either completed or dropped in 2014;
- Continue to provide demographic data and information to municipalities, businesses, non-profit groups, other government agencies and the public; and
- Maintain Evaluation as an ongoing process.

2. Provide support for local economic development efforts

- Work with our member communities to implement their District Local Technical Assistance (DLTA) Planning Ahead for Growth projects;
- Support the City of Lowell in its implementation efforts related to the Hamilton Canal and Ayer's City Industrial Park projects (includes the Urban Renewal Plan submission);
- Work with the City of Lowell on its DIF funding opportunities and revising the zoning ordinance to remove barriers to entrepreneurial businesses locating in the City;
- Develop the Billerica and Dracut Economic Development Strategic Plans in conjunction with the Billerica economic development staff and the Dracut Economic Development Committee;

- Work with the Town of Tewksbury and the Tewksbury Economic Development Committee to complete the Economic Development Statistical Analysis Tool (EDSAT) with Northeastern University and develop the Economic Development section of the updated Master Plan;
- Complete the work with the Town of Chelmsford to encourage the redevelopment of Vinal Square through the attraction of private investments;
- Support Pepperell in its efforts to be designated as a Green Community;
- Provide ongoing support to the Town of Westford in finalizing a TIF Agreement with Cynosure, focusing on the economic benefits provided by agribusinesses and modifying the commercial zoning requirements in the villages.
- Support the use of the Economic Development Incentive Program (EDIP) and Chapter 43D program to attract private business;
- Utilize the resources available under the EDA Public Works Program and the MassWorks program to address infrastructure issues; and
- Advocate for other federal and state funds to support local economic development initiatives.

3. Assist and provide technical assistance for regional economic development projects.

- Promote the Hamilton Canal District and the Ayer's City Industrial Park as important economic generators that benefit the region;
- Work with local communities on regional solutions to local problems, such as addressing the sewer and water capacity issues, as well as the stormwater issues;
- Support the Towns of Billerica and Chelmsford and the City of Lowell through the Middlesex 3 Coalition, which is designed to attract businesses to these communities (plus Bedford and Burlington) through a coordinated marketing effort;
- Continue working with the Merrimack Valley Economic Development Council (MVEDC), the Greater Lowell Chamber of Commerce (GLCC) and the Greater Lowell Workforce Investment Board (GLWIB) to support regional economic development projects; and
- Support efforts by the Executive Office of Housing and Economic Development (EOHED), MassDevelopment, the Massachusetts Office of Business Development and the Massachusetts Biotechnology Council to encourage private businesses to expand and locate in the Greater Lowell region.

Goals outlined in the *Greater Lowell CEDS for 2009-2013*

I. **Economic Development: Develop a regional economic development framework that supports the efforts of private industry, local communities and agencies, educational institutions, federal and state agencies and private foundations to create jobs and improve the quality of life in the region.**

- Maintain the economic development partnership with EDA through funding for the development of the Greater Lowell CEDS for 2014-2018;
- Complete the DLTA Planning for Growth projects as identified previously;
- Support the Hamilton Canal and Ayer's City Industrial Park projects;
- Address ongoing infrastructure needs within our member communities by supporting EDA Public Works and MassWorks projects; and
- Work with the Lowell Plan, Lowell Development Financial Corporation (LDFC), and other nonprofit organizations to promote economic development in the region.

II. **Workforce Development: Increase the supply of skilled workers for industry in the region through the integration of the economic development and workforce development systems**

- Work with the Greater Lowell Workforce Investment Board (GLWIB) and the Career Center of Lowell to coordinate economic development and workforce development policies through involvement on the GLWIB Board;
- Encourage workforce development support for emerging industry sectors through participation on the Emerging Sectors Committee of the GLWIB;
- Take advantage of state and federal programs focusing on job training in the area of green and renewable energy;
- Encourage private sector investment in training opportunities through a public/private partnership that reduces the tax burden for private companies; and
- Work with the state's Rapid Response Team and local businesses experiencing layoffs to assist employees in finding new jobs.

III. **Education: Improve the educational and workforce skills of primary, secondary and college students to meet the current and future needs of industry.**

- Work with UMass Lowell and the City of Lowell to address the education needs of biotech, nanotech and other emerging industries;
- Partner with Middlesex Community College to identify training opportunities with expanding companies; and
- Support local communities in their efforts to access training programs for residents.

IV. Affordable and Market-Rate Housing: Create more affordable and market-rate housing throughout the region to ensure that businesses can expand and relocate to the region with the assurance that their workforce will be able to own, lease or rent quality housing.

- Complete the Housing Production Plans (HPPs) for Dracut, Pepperell and Billerica and submit them for approval by the Department of Housing and Community Development (DHCD);
- Develop the Regional Housing Plan for the Greater Lowell region building upon the Potential Housing Sites identified in the Regional Strategic Plan and the six HPPs recently completed (includes Westford, Tewksbury and Tyngsborough);
- Implement the other DLTA Planning for Housing projects, including the Chapter 40R project in Tyngsborough;
- Support the construction of multi-family housing units in the region in addressing the State’s goal of producing 10,000 new multi-family housing units per year; and
- Address foreclosures within the region by working with financial institutions, non-profits, and governmental entities on foreclosure prevention initiatives and financial literacy.

V. Regional Transportation System: Develop the infrastructure needed to build upon the strengths of the regional highway system and the public transit networks to enhance access to the economic centers of the region.

- Support the implementation of the Rourke Bridge replacement and Exit 36 project in Tyngsborough to address regional traffic issues;
- Expand the downtown trolley system to connect the Hamilton Canal District with Gallagher Terminal and UMass Lowell;
- Complete the Billerica portion of the Middlesex Turnpike project;
- Work in partnership with MassDOT and the Town of Tewksbury to implement traffic improvements along the Route 38 corridor; and
- Expand public transportation options to better serve suburban employment centers in Chelmsford, Pepperell, Tyngsborough and Westford.

VI. Infrastructure: Build upon the existing sewer, water, telecommunication and public utility infrastructure to increase capacity so that private businesses and homeowners can grow in the future.

- Support the funding of infrastructure projects through the EDA Public Works program and the State’s MassWorks program;
- Build upon the work of the Stormwater Collaborative to address the stormwater issues in our member communities and four other communities (Burlington, Carlisle, Littleton, and Wilmington) on a regional basis;
- Work with the member communities and utilities to implement electric aggregation

projects that reduce the cost of energy to businesses and residents;

- Foster the development of telecommunications infrastructure to enhance access to global networks and to address gaps in broadband availability and service through public/private telecommunications infrastructure initiatives, including, but not limited to:
 - a. Open access broadband initiatives, such as *MassBroadband 123*;
 - b. Public computer centers and public internet access points; and
 - c. Affordable internet access and computer equipment programs.
- Integrate internet adoption, technology adoption, and digital education into economic and workforce development, business development, education, housing, health care, and open government policy, including, but not limited to:
 - a. Foster digital literacy and technology education in schools, colleges, community based education, business assistance and development, accessible technology, workforce training, and online learning and public education programs;
 - b. Promote e-commerce, e-health, and e-government services and initiatives; and
 - c. Promote affordable housing development wired for internet access.

VII. Financial Investments: Target federal, state, local, non-profit and private funds to those projects that create jobs and improve the quality of life in the neighborhoods.

- Identify additional federal, state and private funds in order to implement the Hamilton Canal and Ayer's City Industrial Park projects;
- Work with EDA officials to promote economic development projects in the region and to access public works funds for these projects;
- Work with the Lowell Plan and the Billerica Community Alliance to identify funding opportunities for expanding businesses; and
- Utilize the state's Economic Development Incentive Program (EDIP) as a means to attract businesses to local communities.

VIII. Quality of Life: Maintain the community character in the region by preserving and protecting the region's natural, cultural and historic resources and encouraging concentrated development.

- Assist member communities, including the Town of Billerica, with the preparation of local Open Space and Recreation Plans;
- Work with the National Park Service to maintain the historic nature of the Hamilton Canal District and to expand its resources;
- Support the Bruce Freeman Rail Trail expansion to Concord, and to the Concord River Greenway in Lowell via River Meadow Brook; and
- Support the Yankee Doodle Bike Path in Billerica and the proposed rail trail in Tewksbury.

V. EVALUATION

As outlined originally in the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2004-2008*, the most critical aspect of any plan is the evaluation component. Without an annual evaluation of the programmatic efforts being undertaken to achieve the stated Goals and Objectives in the Five-Year CEDS document, it is difficult for NMCOG and its economic development partners to determine how successful they've been and what, if any, changes need to be made. NMCOG recognizes that the Greater Lowell CEDS Committee and the NMCOG Council have a role to play in this overall evaluation process as well. It is also clear that NMCOG and the Greater Lowell CEDS Committee do not have the sole responsibility for achieving the CEDS Goals and Objectives, but that it is also the responsibility of the other economic development stakeholders in the region. As the lead economic development agency for the region, NMCOG needs to collect the necessary information during the year and report on it as part of the Annual CEDS Update process. However, given the ongoing funding and time constraints, it is often difficult to fully document the accomplishments of the other economic development stakeholders in the region. We will continue to do a better job of this in the future through the strengthening of our relationships with the other economic development partners.

This section provides an evaluation of the contract period in relation to the Evaluation Methodology that was outlined in the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2004-2008*. This Evaluation Methodology will be modified by the Greater Lowell CEDS Committee as part of the Five-Year CEDS for 2013-2018. The Evaluation Methodology focuses upon both quantitative and qualitative measures and attempts to provide an overall assessment of the program activities in accordance with what was originally established. The annual assessment process also helps identify those areas that need to be improved upon, as well as what areas have been addressed fully. The evaluation components have been broken out into three separate areas: the CEDS Implementation Process, the CEDS Goals and the CEDS Priority Projects. Each area is important to the overall success of the CEDS program in the Greater Lowell region.

A. CEDS IMPLEMENTATION PROCESS

The CEDS Implementation Process addresses how the “grass-roots” CEDS process was implemented during the program year, the level of participation at the Greater Lowell CEDS Committee meetings and other forums, the availability and dissemination of data that was developed through the completion of the Annual CEDS Update and the CEDS Marketing and Outreach process. Each of these components is essential to the overall functioning of the “grass-roots” CEDS process and ensures greater participation by businesses, community organizations, municipalities, minority groups, nonprofit groups, public agencies and the general public in the CEDS process. Outlined below are the evaluation results for the Levels of Participation, Data Development and Dissemination and CEDS Marketing & Outreach components:

1. Levels of Participation

The levels of participation at the public and CEDS Committee meetings are critical to the continuing success of the CEDS program. NMCOG needs to improve its recruitment effort in attracting people from various backgrounds to participate in public meetings

and to serve on the CEDS Committee. This effort is necessary in order to maintain the “grass-roots” nature of the CEDS process.

The Greater Lowell CEDS Committee met seven (7) times during the contract period and had an additional meeting to approve the document. The membership of the Greater Lowell CEDS Committee was expanded to include more representatives of local communities and state agencies. Due to job changes and retirements, there has been some turnover of membership on the CEDS Committee. During our CEDS Committee meetings, we’ve had fairly good attendance. The attendance at our meetings is documented in our minutes for each meeting. The establishment of the Energy Advisory Committee (EAC) as part of our Siting of Renewable Energy Facilities Study grant has supplemented the private sector energy expertise previously available to us. The EAC has largely functioned as a subcommittee of the Greater Lowell CEDS Committee and has provided input to the Annual CEDS “grass-roots” process.

NMCOG has updated its mailing list every year since the initial Five-Year CEDS was developed. During this past year, we worked with our economic development partners to co-sponsor different events. NMCOG, in conjunction with the Northeast Regional Brownfields Coalition, MassDevelopment, the Massachusetts Department of Environmental Protection (MassDEP), the Executive Office of Housing and Economic Development (EOHED), the Merrimack Valley Planning Commission (MVPC), and the U.S. Environmental Protection Agency (EPA), Region 1, co-sponsored a Brownfields Forum on October 18, 2011. NMCOG co-sponsored the Energy Forum held by the Merrimack Valley Economic Development Council (MVEDC) on September 12, 2012 in North Andover. NMCOG staff hosted the Strengths, Weaknesses, Opportunities and Threats (SWOT) sessions in Vinal Square for residents on October 3, 2013 and for businesses on November 7, 2013. Additionally, NMCOG hosted a Citizens Planning Training Collaborative program on Solar Zoning on November 4, 2013. These sessions were all well attended.

Based upon the quantitative and qualitative measures established for this component, NMCOG exceeded its estimates in terms of the number of attendees at most of its public meetings. The participation of the CEDS Committee was fairly steady, but due to some vacancies that developed, there is room for improvement in this area. NMCOG also needs to develop an evaluation tool to be used in conjunction with its public forums.

2. Data Development and Dissemination

NMCOG provides data to the general public and local communities on an ongoing basis. The additional role related to the CEDS complements the efforts NMCOG already makes to keep the public and member communities apprised of new data that impacts the area. Among the data provided are the U.S. Census, local and regional traffic counts, labor market information, housing affordability information, GIS maps and recent newspaper articles. NMCOG provides this information on its website at www.nmcog.org and by telephone, fax, mail and e-mail transmission. The private sector also contacts this office for data on individual communities within the region. At some point, NMCOG will work with local communities to assemble information on a regional basis on available commercial and industrial space.

NMCOG continues to provide extensive data to the public through its web site and through personal requests. The presence of the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2008-2013* on our web site has provided the most up-to-date and complete economic development document on our region that we've ever developed. We continue to receive inquiries on updated economic information that we provide to the public. We also share updated economic development documents that we develop as part of the CEDS process with our member communities. When our local communities develop grant applications for which they needed updated data, our office regularly provides the information. Through our work with the Towns of Billerica, Dracut and Tewksbury, we've provided updated economic development data through our contracts related to the Economic Development Strategies in Billerica and Dracut and the updated Comprehensive Master Plan in Tewksbury. Similarly, in our development of the Affordable Housing Production Plans for Billerica, Dracut, Pepperell, Tewksbury, Tyngsborough and Westford, we've utilized updated federal, state and local housing statistics to address the HPP requirements as established by the Department of Housing and Community Development (DHCD).

We have had some requests for copies of the Five-Year CEDS even though it is available on our web site. Our annual requests and referrals far exceed the evaluation criteria we originally outlined for this component. Our office continues to work with the U.S. Census Bureau on the 2010 U.S. Census and the updated American Community Survey so that we can make this information available to our local communities. In terms of the external requests we've had on our web site, the following data summarizes the number of external hits we received between January and December, 2013:

Table 23: Monthly website usage for nmcog.org (January 2013-December 2013)

| Month | Number of External Website Requests | % of Total Requests |
|-------------------|-------------------------------------|---------------------|
| Jan-13 | 68,992 | 7.59 |
| Feb-13 | 66,754 | 7.34 |
| Mar-13 | 72,335 | 7.96 |
| Apr-13 | 72,587 | 7.98 |
| May-13 | 70,228 | 7.72 |
| Jun-13 | 69,889 | 7.69 |
| Jul-13 | 70,558 | 7.76 |
| Aug-13 | 75,609 | 8.32 |
| Sep-13 | 78,889 | 8.68 |
| Oct-13 | 89,475 | 9.84 |
| Nov-13 | 88,587 | 9.74 |
| Dec-13 | 85,254 | 9.38 |
| Total 2013 | 909,157 | 100% |

3. CEDS Marketing & Outreach

Now that the CEDS Update document has been completed, NMCOG can continue its marketing and outreach efforts to promote the CEDS. In our presentations before the Lowell City Council and the Boards of Selectmen in the towns, as well as before various businesses, social and community groups, we will re-emphasize the importance of the CEDS process and document. The effort under this component will provide increased level of participation under Component One summarized earlier. The CEDS document will also be on the NMCOG web site and will be linked with other web sites in the region. Increased marketing via the Lowell Sun and the community newspapers will be implemented once the CEDS document is approved by EDA

Apart from the work that NMCOG has done related to its annual CEDS Update process and its request for Priority Projects, we have made regular presentations before the Lowell City Council and the Boards of Selectmen in each community. As part of our work with the Executive Office of Housing and Economic Development (EOHED) on the Greater Lowell Regional Strategic Plan (RSP) in 2011 and early 2012, we made multiple presentations before the Lowell City Council and each Board of Selectmen on the Priority Development Areas, Priority Preservation Areas and Potential Housing Sites in their community and tied this directly into our annual CEDS process and document. Furthermore, as we receive approvals from each community on their Economic Development Strategy or Affordable Housing Production Plan, we tie these documents back to the current CEDS document. As part of these presentation, we focused on our CEDS document and process and encouraged their involvement in our public process. We also explained how we request projects on an annual basis to include on our CEDS Priority Project list.

Based upon the quantitative and qualitative measures established, NMCOG needs to do more in marketing the CEDS document and program. Even though our five presentations fall within the “good” category, there is a need to broaden our marketing efforts. In our public forums, we stress how the CEDS document is important to regional development in Greater Lowell. Since our Council is comprised of elected officials from the City Council/Boards of Selectmen and Planning Boards, we spend a great deal of time educating them on the benefits available under the CEDS program. The funding and completion of the \$ 2 million Hamilton Canal Public Works project has convinced local officials that EDA can assist in the economic development of the region. However, there continues to be the feeling by our suburban communities that only the City of Lowell can benefit from the program. We have been working to educate these officials that layoffs at major industries within the suburban communities will have as big an impact as unemployment rates or per capita income figures.

B. GOALS AND OBJECTIVES

As outlined in the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*, the establishment of quantitative and qualitative measures for the CEDS Goals is more difficult than dealing with the CEDS Implementation Process. As mentioned in the Five-Year CEDS document, each regional or local organization responds to the funding requirements from their federal or state funding agency. Therefore, data is often not available in a form that lends itself to use in our evaluation process. For example, the Greater Lowell Workforce Investment Board (GLWIB) responds directly to the funding requirements established by the

U.S. Department of Labor and the Massachusetts Executive Office of Labor and Workforce Development. However, even given these limitations, NMCOG continues to work with its economic development partners to respond to the CEDS requirements as efficiently and effectively as possible. Outlined below are the evaluation components for the eight CEDS Goals established in the *Greater Lowell CEDS for 2009-2013*:

1. Economic Development

Develop a regional economic development framework that supports the efforts of private industry, local communities and agencies, educational institutions, federal and state agencies and private foundations to create jobs and improve the quality of life in the region.

In terms of the quantitative measures, the Greater Lowell region has benefited economically from the growth in high tech industries. In particular, the City of Lowell and the Towns of Billerica, Chelmsford and Westford have experienced exceptional growth in these areas, even in the midst of the national recession. Economic growth in the other communities has been limited by infrastructure barriers, particularly sewer and water infrastructure, and by market conditions, lack of capital, and overall economic conditions. Each community and economic development stakeholder continues to address these barriers on a local and regional basis.



Kronos Headquarters, Chelmsford

Source: Kronos

As of 2013 the region had submitted the initial economic adjustment application for the first Five Year CEDS, three planning applications, a technical assistance grant application (in partnership with the Montachusett Regional Planning Commission), and a Public Works grant application (from the City of Lowell) to EDA. All these grant applications were successful. As a result, the *Greater Lowell CEDS Update for 2010-2013* has been completed, the “grassroots” CEDS planning process has been maintained, and the City of Lowell received \$2 million in EDA public works funding to complete the Revere Street Bridge, which is an integral component of the Hamilton Canal District.

This area’s regional economic development capacity has grown appreciably since 2002. The Greater Lowell region now has a strong working relationship with EDA and there is an ongoing annual CEDS planning process in place. We have an annual RFP process for CEDS Priority Projects and a permanent Greater Lowell CEDS Committee. There has also been strong recognition of the advantages that can be derived from a comprehensive “grass-roots” economic development planning process. The number of projects that have been completed or started since the previous CEDS document was submitted, as outlined in the Project Status Report section, has been quite significant.

The region's ability to reinvent itself after every economic downturn continues to be a major strength. The cluster of "growth industries", including "green" jobs, the cultural and creative economy, and the energy, nanotech, high tech and health care industries has continued to benefit the region.

2. Workforce Development

Increase the supply of skilled workers for industry in the region through the integration of the economic development and workforce development systems.

The quality of the region's workforce has continued to be a major strength in attracting businesses and encouraging local business expansion. The exceptional skills and strong work ethic of the workforce are an attraction to high technology and biotech firms, which already represent a cluster industry in the region. The active participation of UMass Lowell and Middlesex Community College in training the current and future workforce for these firms is a comparative advantage for the region as well.

The Greater Lowell Workforce Investment Board (GLWIB) continues to play a major role in the workforce development initiatives in the Greater Lowell region. The GLWIB has set the standard for workforce development programs in the region. Both the GLWIB and NMCOG continue to share their respective planning documents and attend each other's training sessions to help integrate the economic development and workforce development systems. The GLWIB Director is a member of the Greater Lowell CEDS Committee and is also an appointed member of our nonprofit entity, NMEDD, Inc. The NMCOG Executive Director serves on the GLWIB Board. In addition, Jay Donovan, NMCOG Assistant Director, serves on the GLWIB's Emerging Sectors Committee. Through the One-Stop Career Center (OSCC) workforce development system, adult and dislocated workers continue to have access to a broad array of services from a comprehensive assortment of employment programs.

3. Education

Improve the educational and workforce skills of primary, secondary and college students to meet the current and future needs of industry.

The quantitative data related to SAT scores from 2013, MCAS rankings by District for 2010 and 2013 (English, Math and Science), and Graduation Rates for 2013 are attached at the end of the Evaluation section. As expected, those communities with the highest income levels also have the highest graduation rates and test scores. The region has continued to focus on improving the graduation rates and test scores, particularly within lower income communities. A number of alternative education programs have been created within the City of Lowell to encourage young adults to stay in school and to continue their education through the community college system.

The Greater Lowell region continues to have one of the better educated labor forces in the country. UMass Lowell, Middlesex Community College and many of the schools in the Greater Boston area have worked together to meet the needs of industry for quality workers. Middlesex Community College offers highly focused programs in selected fields to meet the needs and interests of the area's workforce, including degree and certificate programs, job training, and the development of work skills. The College has continued to work with local employers to educate

and train thousands of employees in hundreds of businesses, industries and municipalities throughout the region. Their goal is to provide the educational and training tools needed to improve the region's competitiveness in a global economy.

UMass Lowell, a comprehensive university with special expertise in applied science and technology, is deeply committed to educating students and conducts research and outreach activities that bring value to the region. As the second-largest of the UMass campuses, Lowell currently serves more than 16,000 undergraduate and graduate students in nearly 90 different degree programs. PayScale.com recently found that an education from UMass Lowell provides the 10th best return on investment (ROI) among public universities in the U.S. The report examined 1,060 U.S. colleges and universities to determine their return on investment based on the total cost of attending and the lifetime earning potential of graduates. It ranked UMass Lowell 10th among 437 public universities and 50th out of all colleges and universities for 2013.

4. Affordable Housing

Create more affordable and market-rate housing throughout the region to ensure that businesses can expand and relocate to the region with the assurance that their workforce will be able to own, lease or rent quality housing.

The Greater Lowell region has made significant progress is addressing this goal. Over the past two years NMCOG has assisted Tewksbury, Tyngsborough and Westford in updating their Housing Production Plans (HPPs), and is currently working with Billerica, Dracut and Pepperell to prepare HPP updates for DHCD approval. The number of new Chapter 40B housing units throughout the region has continued to increase, as described in previous sections of this document. Funding from HUD, DHCD and other state sources has helped provide the capital investment needed to expand the region's inventory of affordable housing for those in low and moderate income groups. NMCOG has also begun work on the development of a Regional Housing Plan that builds upon the work already completed under the individual HPPs and provides support to the State's goal of creating 10,000 additional multi-housing units annually.

The downturn in the housing market that had depressed the values of the housing stock and increased the number of foreclosures in the region appears to be easing slowly. Prices have begun to rebound and the Middlesex North Registry of Deed reports that Orders of Notice (the first step in a residential foreclosure) dropped 56% from 2012 to 2013. Foreclosure deeds (the final step in the process) also declined by an identical percentage. While this is a sign of an improving economy, there is also evidence that lenders have become more willing to allow short sales or deeds in lieu of foreclosure, perhaps realizing that the cost of carrying property purchased at foreclosure tends to offset any paper financial benefits of an actual foreclosure.

The business community has indicated their interest in the production of housing that is affordable to their workforce. In order for these businesses to expand or for other businesses to relocate in this area, there needs to be housing available for their workers. NMCOG has focused extensively on this area due to its strong correlation with a growing economy. The establishment of NMEDD, Inc. as the non-profit arm of NMCOG will enable us to tie economic development and housing initiatives even closer together.

5. Regional Transportation System

Develop the infrastructure needed to build upon the strengths of the regional highway system and the public transportation networks to enhance access to the economic centers of the region.

As staff to the Northern Middlesex Metropolitan Planning Organization (NMMPO), NMCOG plays a unique role in the transportation planning and implementation processes for the state and region. NMCOG is the premier agency for Greater Lowell in addressing the funding for highway and transit projects at the federal and state levels. The agency prepares the required federal transportation certification documents for the region, including the Regional Transportation Plan (RTP), Transportation Improvement Program (TIP), and the Unified Planning Work Program (UPWP). NMCOG has also recognized the importance of tying economic development and transportation activities together. NMCOG is one of a few agencies to have a joint economic development/ transportation component within its work plan with MassDOT and FHWA. This element of the UPWP provides support for a number of projects, including the Rourke Bridge Replacement Project, and improvements to Route 110 in Westford and Route 38 in Tewksbury, the Middlesex Turnpike Phase III project, the Lowell Trolley Extension project, off-site improvements for the Hamilton Canal District, and the Exit 36 southbound off ramp (U.S. Route 3) in Tyngsborough. Within the Goal Attainment section of this document, there is a listing of transportation projects and other infrastructure projects that have been completed or initiated. On both a qualitative and quantitative basis, NMCOG clearly exceeds the evaluation criteria established for this goal.

6. Infrastructure

Build upon the existing sewer, water, telecommunication and public utility infrastructure to increase capacity so that private businesses and homeowners can grow in the future.

The state of a region's infrastructure plays a major role in its economic development potential. The Greater Lowell region has enjoyed a highly developed transportation infrastructure, which was enhanced over the past decade through the expansion of Route 3. Apart from the excellent highway network, access to public transit, multiple airports, freight transportation and bicycle and pedestrian facilities remains an enormous advantage for this region.

The status of the region's water and sewer systems varies from community to community, yet there is a demonstrated need to address regional sewer capacity in the future if private economic development investments are to continue. Utilities in the region have provided the Greater Lowell communities with the necessary electric and natural gas services, as well as telecommunications and internet support. Continued public investment in the region's infrastructure, particularly sewer and water systems, will be needed to maintain and expand economic growth for the next decade. Since the submittal of the Five-Year CEDS, the Town of Billerica, Chelmsford and Tewksbury have made significant progress in implementing additional phases of their sewer programs. In fact, the Town of Chelmsford is now fully sewered and 98% of the Town of Tewksbury's sewer system has been completed.

Electric service and natural gas service is provided to all of the region's communities through National Grid. The communities of Billerica, Chelmsford, Dracut, Lowell, Tewksbury,

Tyngsborough and Westford are served by Comcast, which provides digital cable TV, as well as high speed (broadband) internet access, web hosting and e-commerce for businesses. Comcast also provides business solutions for small (less than 20 employees), medium (20 to 100 employees) and large (more than 100 employees) businesses. The Towns of Dunstable and Pepperell are served by Charter Communications, Inc., which provides businesses with cable TV WAN services, high-speed (broadband) internet access, fiber services, telephone and video service. There are some areas of the region where gaps in broadband coverage remain. NMCOG has encouraged the municipalities to work with service providers through the contract renewal process to address these gaps.

NMCOG established the Northern Middlesex Stormwater Collaborative in 2012, which was originally comprised of the nine NMCOG communities. In 2013 the adjoining communities of Burlington, Carlisle, Littleton, and Wilmington were added. The Collaborative focuses on addressing the region's stormwater infrastructure needs using funding provided through the State's Community Innovation Challenge (CIC) Grant program.

7. Financial Investments

Target federal, state, local, non-profit and private funds to those projects that create jobs and improve the quality of life in the neighborhoods.

The financial investments in the region have exceeded the evaluation criteria outlined in the Five-Year CEDS. As outlined in the Goal Attainment section, there are several retail, commercial and industrial projects being developed in the region. The State has focused on improvements to the Hamilton Canal District and has maintained its commitment to economic development throughout the region through the EDIP and MassWorks programs. The Greater Lowell region has earned its reputation as a place for private firms to invest their money. As a result, significant expansion projects have benefited the region, including the expansions of UMass Lowell and Lowell General Hospital. In addition, a number of business expansions have created new job opportunities for residents, including the expansion of Red Hat and IBM in Westford, Kronos in Chelmsford, and ThermoFisher in Tewksbury.

8. Quality of Life

Maintain the community character in the region by preserving and protecting the region's natural, cultural and historic resources and encouraging concentrated development.

Quality of life and related issues are strengths for this area. The region's livability, in terms of historical and cultural resources, and access to the area's natural resources make this an enjoyable place to live, work and visit. Economic, social and educational opportunities also contribute to the quality of life for area residents and visitors. The Greater Lowell region has extensive cultural and recreational amenities. Over the past few years, the region has increasingly recognized the importance of its cultural economy. The Creative Economy project was initiated by the Merrimack Valley Economic Development Council (MVEDC) through a small grant it received from the Massachusetts Cultural Council. The focus of this project was to define the creative economy in the Merrimack Valley, quantify its contributions to the overall economy, and promote the growth of the creative economy as a means to diversify the economy

and provide a destination location for travelers and shoppers. The communities involved in this project included the nine Greater Lowell communities.

NMCOG has assisted the Town of Dracut in inventorying its historic resources and developing a historic preservation plan. In addition, the NMCOG staff has worked with the Town of Billerica to address two abutter appeals relative to a permit issued by the Billerica Historic District Commission. We have also provided assistance to the Middlesex Canal Commission relative to the preservation of the Canal and the construction of the North Billerica Mill Pond Park. We have assisted the Town of Chelmsford in developing a Strategic Plan for the historic Vinal Square mill village.

NMCOG plays a prominent role in the region as part of the Massachusetts Environmental Protection Act (MEPA) review process. Since 2010 NMCOG has completed several environmental reviews for projects proposed across the region. NMCOG actively works on Open Space and Recreation Plans for its member communities, and has been assisting the local communities with the extension of the Bruce Freeman Bike Path, completion of the Concord River Greenway, and development of a trail along River Meadow Brook.

The communities in this region have utilized funding through the Community Preservation Act to finance open space and historic preservation initiatives, as well as to support affordable housing projects. The listing within the Goal Attainment section provides a good sampling of the Quality of Life projects that have been funded or completed in the past year.

C. CEDS PRIORITY PROJECTS

The CEDS Priority Projects represent a major component of the overall CEDS effort. These projects are funded by multiple funding sources and each one addresses a specific goal or goals within the CEDS. These projects are important to the local communities and non-profit agencies that sponsored them and have been included because they help move the Greater Lowell region closer to its Vision. A limited number of projects are eligible for EDA funding and will be reported on separately from the other projects. Many of the transportation projects included on the regional Transportation Improvement Program (TIP) are dependent upon passage of federal legislation, as well as changing state priorities. In essence, this component will be deemed to be successful if projects are implemented, there is movement from the Short-Term, Intermediate and Long-Term project priority lists and new projects are submitted each year.

There has been significant movement on the Priority Project List, whereby important projects in the region have received their funding through other sources. The Status of the Priority Projects Listing provides an overview of every project that has been completed, started or dropped from the 2009-2013 Priority Project List. NMCOG has prepared a draft application for EDD designation, which will be submitted within the next few months, and will continue to apply for planning or economic adjustment funds to maintain the continuous, comprehensive “grass-roots” economic development planning process. NMCOG has exceeded the evaluation criteria for the CEDS Priority Projects component.

Table 24: 10th Grade MCAS Test Score Rankings among 354 Massachusetts Public High Schools, 2010 and 2013

| Public High School | Rank Among Massachusetts Public High Schools | | | | | |
|--|--|--------------|-----------|-----------|--------------|--------------|
| | 2010 English | 2013 English | 2010 Math | 2013 Math | 2010 Science | 2013 Science |
| Billerica | 194 | 149 | 110 | 177 | 143 | 100 |
| Chelmsford | 14 | 70 | 28 | 59 | 143 | 184 |
| Dracut | 150 | 149 | 139 | 177 | 129 | 166 |
| Dunstable (Groton-Dunstable High School) | 14 | 34 | 8 | 6 | 10 | 15 |
| Lowell | 263 | 292 | 255 | 276 | 266 | 285 |
| Pepperell (North Middlesex Regional High School) | 137 | 102 | 127 | 144 | 124 | 143 |
| Tewksbury | 137 | 149 | 143 | 144 | 143 | 151 |
| Tyngsborough | 45 | 102 | 120 | 102 | 45 | 20 |
| Westford | 6 | 34 | 12 | 12 | 7 | 10 |

Source: Massachusetts Department of Education

Table 25: 2013 SAT Scores by Community

| Public High School | Critical Reading | Math | Writing | Total |
|--|------------------|------|---------|-------|
| Billerica | 500 | 536 | 498 | 1,535 |
| Chelmsford | 538 | 562 | 537 | 1,637 |
| Dracut | 491 | 492 | 489 | 1,472 |
| Dunstable (Groton-Dunstable High School) | 549 | 579 | 538 | 1,666 |
| Lowell | 459 | 486 | 440 | 1,385 |
| Pepperell (North Middlesex Regional High School) | 521 | 520 | 504 | 1,545 |
| Tewksbury | 504 | 512 | 489 | 1,505 |
| Tyngsborough | 515 | 544 | 494 | 1,552 |
| Westford | 589 | 601 | 577 | 1,767 |

Source: Massachusetts Department of Education

Table 26: High School Graduation Rates by Community

| Community | Graduation Rate (%) |
|--|----------------------------|
| Billerica | 86.1 |
| Chelmsford | 93.3 |
| Dracut | 82.2 |
| Dunstable | 96.2 |
| Lowell | 75.3 |
| Pepperell | 92.8 |
| Tewksbury | 87.8 |
| Tyngsborough | 94.6 |
| Westford | 98.1 |
| <i>Source: Massachusetts Department of Education</i> | |

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APPENDIX I – GREATER LOWELL CEDS COMMITTEE MEMBERSHIP

| Member | Agency | Public | Private | Male | Female | White | Minority |
|--------------------|--|--------|---------|------|--------|-------|----------|
| Gail Brown | Greater Lowell Workforce Investment Board | ● | | | ● | ● | |
| Francisco Carvalho | Mill Cities Community Investments | | ● | ● | | ● | |
| Arthur Ford | Sullivan & Billie, Inc. | | ● | ● | | ● | |
| Gerard Frechette | Washington Savings Bank | | ● | ● | | ● | |
| Matt Hanson | NMCOG Council/Town of Chelmsford | ● | | ● | | ● | |
| Stacie Hargis | Middlesex Community College | ● | | | ● | ● | |
| Richard Howe | Northern Middlesex Registry of Deeds | ● | | ● | | ● | |
| Steve Joncas | Lowell Plan/LDFC | | ● | ● | | ● | |
| Chris Kluchman | Town of Westford | ● | | | ● | | |
| William Lipchitz | Community Teamwork, Inc. | ● | | ● | | ● | |
| Danielle McFadden | Greater Lowell Chamber of Commerce | | ● | | ● | ● | |
| Peter Milano | Massachusetts Office of Business Development | ● | | ● | | ● | ● |
| Barbara O’Neil | Career Center of Lowell | ● | | | ● | ● | |
| Theresa Park* | DPD, City of Lowell | ● | | | ● | | ● |
| Stephen Sadwick | Town of Tewksbury | ● | | ● | | ● | |
| Stephen Themelis | Town of Pepperell | ● | | ● | | ● | |
| David Tibbetts | MVEDC | | ● | ● | | ● | |
| Kristen Wood* | Congresswoman Niki Tsongas | ● | | | ● | ● | |
| Beverly Woods* | NMCOG | ● | | | ● | ● | |

* Ad hoc member.

APPENDIX II – GREATER LOWELL CEDS COMMITTEE MEETINGS

Included documents:

Agendas and Meeting Minutes for CEDS Committee meetings



Northern Middlesex Council of Governments

CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Northern Middlesex Council of Governments

A Multi-Disciplinary
Regional Planning
Agency Serving:

August 30, 2011

12:00-1:00 P.M.

NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

Billerica
Chelmsford
Dracut
Dunstable
Lowell
Pepperell
Tewksbury
Tyngsborough
Westford

Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

40 Church Street
Suite 200
Lowell, MA
01852-2686

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www.nmcog.org

AGENDA

1. **Welcome and Introductions**---Beverly Woods, Executive Director
2. **CEDS Committee Membership** - Jay Donovan
3. **Greater Lowell CEDS Program** – Jay Donovan
 - Workplan
 - Public Forums
 - Brownfields
 - Sustainable Development
 - CEDS “grass-roots” planning process
 - Annual CEDS Update for 2010-2012
 - Economic Development District designation
4. **Other Economic Development Initiatives** – Jay Donovan
 - Joint Economic Adjustment Application with MRPC
 - Strong Cities, Strong Communities Visioning Challenge
 - MassWorks Infrastructure Program
 - EDIP Initiatives
 - HUD Sustainable Communities Regional Planning Grant
 - District Local Technical Assistance (DLTA) Program
5. **Next Meeting**
6. **Adjournment**

CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

August 30, 2011

CEDS Committee Members: Danielle Bergeron, Gail Brown, Arthur Ford, Jerry Frechette, Frank Carvalho, Richard Howe, Steven Joncas, David Tibbetts, Theresa Park, Steve Sadwick, and Stephen Themelis

NMCOG Staff: Jay Donovan and Beverly Woods

1. Welcome and Introductions

Beverly Woods, NMCOG Executive Director, welcomed the CEDS Committee members to the meeting and asked that they introduce themselves.

2. CEDS Committee Membership -Jay Donovan

Jay Donovan, Assistant Director of NMCOG, reviewed the list of CEDS Committee members. The Committee members then discussed potential candidates for expanding the current membership.

3. Greater Lowell CEDS Program -Jay Donovan

Jay Donovan provided an overview of the CEDS process and reviewed the project work plan as approved by EDA. He noted that the EDA planning process requires the development Five-Year CEDS document and Annual CEDS Updates for the following four years. Given that EDA grant approval and contracting timeframes, this update will cover 2010-2013. Mr. Donovan noted that this DCEDS update will include a new section on Renewable Energy. He then reviewed the contents and structure of the document.

Mr. Donovan stated that under NMCOG's current planning grant, two public forums will be held as part of the CEDS update process. The forums will focus on sustainable development and brownfields. Frank Carvalho asked about the difference between forums and visioning process. Mr. Donovan described the format and purpose of the two forums and outlined the CEDS "grass-roots" planning process.

Mr. Donovan provided an overview of the proposed Economic Development District (EDD) application process, which will be submitted at the same time as submission of the CEDS update. Stephen Themelis asked about the advantages of EDD designation. In response, Mr. Donovan stated that the EDD designation ensures that the region remains eligible for EDA funds, as long

as it continues to meet the criteria for the program. Planning funds would also be made available to the region for a three-year period, eliminating the need to compete annually for such funds.

4. Other Economic Development Initiatives -Jay Donovan

Joint Economic Adjustment Application with MRPC

Mr. Donovan described the joint economic adjustment application currently being prepared in partnership with the Montachusett Regional Planning Commission (MRPC). The application is targeted for submittal to EDA in September. The proposed project will focus on the Siting of Renewable Energy Facilities. Under the grant, it is proposed that NMCOG would establish an Energy Committee to work in tandem with the CEDS Committee. Similarly, MRPC will continue its Energy Committee meetings. A number of workshops will be scheduled and each will focus on a specific aspect of renewable energy (wind, solar, hydropower, etc.) The goal of the plan is to identify measures that will encourage the siting of additional renewable energy facilities within each region.

Strong Cities, Strong Communities Visioning Challenge

Jay Donovan provided an overview of the Economic Development Administration's (EDA) recently announced Strong Cities, Strong Communities Initiative, which focuses on helping economically distressed cities leverage innovative strategies that spur local economic and job growth.

MassWorks Infrastructure Program

Mr. Donovan described the State's MassWorks Infrastructure Program, which is designed to support housing and economic development opportunities that contribute to the strength and sustainability of the Commonwealth. Particular emphasis is placed on projects that create multi-family housing promote economic development within a mixed-use district or in economically distressed areas. David Tibbetts asked if the grant applications can be made on a quarterly basis. Mr. Donovan replied that applications can only be filed annually.

EDIP Initiatives

Jay Donovan discussed the Town of Tewksbury's initiative to establish an Economic Target Area, as well as the Town of Westford's recent Tax Increment Financing (TIF) application for the expansion of Red Hat. He also provided an update on Chelmsford's plans to expand its Economic Opportunity Area (EOA) and then discussed the certified projects located within Billerica.

HUD Sustainable Communities Regional Planning Grant

Mr. Donovan provided an overview of the HUD Sustainable Communities Regional Planning (SCRIP) Grant Program. The program supports locally-led collaborative efforts that bring together diverse public and non-profit stakeholders across the region. NMCOG is preparing a grant application to develop a regional strategic plan for sustainability. The Plan will focus on housing, economic development, workforce development, and infrastructure investment, with a goal of creating jobs, increasing regional economic activity, and improving the quality of life for area residents.

District Local Technical Assistance (DLTA)

Mr. Donovan described the District Local Technical Assistance (DLTA) program, stating that the Department of Housing and Community Development provides these funds which are specifically targeted for projects that promote economic development, streamlined permitting, the creation of additional housing units, and municipal partnerships. A request for proposals was distributed to each community to solicit candidate projects. The program funds NMCOG staff time for those projects identified by the municipalities. Cash grants are not allocated to each community. Mr. Donovan then provided an overview of the various projects that are underway within each community.

5. Next Meeting

Mr. Donovan indicated that the next CEDS Committee meetings will be scheduled for October 2011 and/or January 2012.



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

January 24, 2012

12:00-1:30 P.M.

NMCOG Conference Room

40 Church Street, Suite 200, Lowell, MA

A Multi-Disciplinary

Regional Planning

Agency Serving:

Billerica

Chelmsford

Dracut

Dunstable

Lowell

Pepperell

Tewksbury

Tyngsborough

Westford

Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

40 Church Street
Suite 200
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01852-2686

TEL: (978) 454-8021

FAX: (978) 454-8023

www.nmcog.org

AGENDA

1. **Welcome---**Beverly Woods, Executive Director
2. **Approval of Minutes – Beverly Woods**
3. **CEDS Work Plan – Jay Donovan**
 - Annual CEDS Update
 - Components
 - Timeframe
 - Priority Projects
 - Approval of document
 - Economic Development District application
 - Public Forums:
 - Brownfields - March
 - Energy - May
 - Siting of Renewable Energy Facilities grant
 - Identification of Public Works and Econ. Adj. projects
4. **Economic Development Initiatives - Jay Donovan**
 - Regional Strategic Plan
 - Brownfields application
 - Tanner Street Economic Development District Plan
 - District Local Technical Assistance (DLTA) V projects
 - DOT Certification Review
 - EOHED’s Economic Development Plan
5. **Next Meeting – April 10, 2012**
6. **Adjournment**

CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)

for the Greater Lowell Region

Meeting Minutes

January 24, 2012

CEDS Committee Members: Danielle Bergeron, Gail Brown (representing Barbara O’Neil), Frank Carvalho, Arthur Ford, Jerry Frechette, Steve Sadwick and Stephen Themelis.

NMCOG Staff: Beverly Woods, Jay Donovan and Nathaniel Strosberg.

1. Welcome and Introductions

Beverly Woods, Executive Director of NMCOG, welcomed the CEDS Committee members and thanked them for their participation. Ms. Woods asked the participants to introduce themselves.

2. Approval of Minutes

Ms. Woods requested that this agenda item be passed over since the draft minutes had not been mailed to the CEDS Committee members prior to the meeting.

3. CEDS Work Plan

Jay Donovan, Assistant Director of NMCOG, proceeded to provide an overview of the CEDS

Work Plan as submitted by NMCOG and approved by EDA. For clarification purposes, Mr. Donovan stated that EDA generally requires that two different types of CEDS documents be developed: the Five-Year CEDS document and the Annual CEDS Updates. Given that EDA approved the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*, NMCOG and the Greater Lowell CEDS Committee were now required to complete the *Annual CEDS Update for 2010-2012*. Mr. Donovan noted that the Annual CEDS Update should be submitted to EDA by July 1st, but that the planning contract had been established as a two-year contract. Mr. Donovan suggested that the next CEDS Committee meetings be scheduled for April 10th to review the CEDS Priority Projects and June 12th for the CEDS Committee to vote on making a recommendation to the Council on the approval of the Annual CEDS Update. Upon the recommendation of the CEDS Committee, the Council would then be asked to approve the Annual CEDS Update at their June meeting so that the document could be submitted to EDA by the end of June.

Mr. Donovan stated that EDA added two new elements to the contract: the Tanner Street Initiative funded by the Environmental Protection Agency (EPA) and a clean energy component. Within the Annual CEDS Update, the CEDS Priority Projects and major regional projects would

be outlined. In identifying the CEDS Priority Projects, any funding source –workforce training funds, CDBG funds, non-profit resources, etc.- can be included so long as the implementation of the project furthers one or more of the eight goals established for the region. In developing the CEDS Priority Project list for this year’s Annual CEDS Update, the local communities will be asked to provide an update on the projects that were on the 2009-2013 CEDS Priority Project list. Based upon the activities under the Transportation Improvement Program (TIP) and the Regional Transportation Plan (RTP), NMCOG will assume responsibility for all the transportation projects in the region. Once these projects have been submitted, the short-term, intermediate and long-term CEDS Priority Project list will be developed for consideration by the CEDS Committee. Mr. Donovan emphasized that EDA-funded projects must be listed in the CEDS document to receive funding. A draft CEDS Priority Projects package, consisting of a memo to the Chief Administrators, project criteria and a one-page application sheet, has been assembled for distribution to each municipality. Copies of this material will be provided to the CEDS Committee members as well.

Frank Carvalho asked whether projects funded by the U.S. Department of the Treasury or state agencies should be included. Mr. Donovan responded that these projects would be included if they helped address one of the eight goals established through the Five-Year CEDS document.

Jerry Frechette asked a question about the eligibility of CEDS projects, which prompted a discussion on the Hamilton Canal District. Mr. Donovan noted that the Hamilton Canal project was on the CEDS Priority Project list and that it received a \$2 million dollar EDA public works grant to address infrastructure issues. He also mentioned that the EDA may be interested in a new initiative as well and the project should be included. Mr. Donovan stated that the Tanner Street Initiative is one of only two statewide projects that received EPA funding, and that the EDA is strongly focusing on the initiative and requests that it be incorporated into the program.

He also mentioned that the Tanner Street Initiative may have infrastructure projects.

Steve Themelis asked for clarification on why the CEDS Priority Project Report states that the EDA Planning Grant for 2007 has been completed while the 2008 EDA Planning Grant is still underway. Mr. Donovan noted that when the CEDS document was submitted, the EDA Planning Grant (2008) had not been closed out. He also explained that EDA won’t provide more than three consecutive short-term planning grants, thereby requiring that NMCOG skip a year of CEDS planning funds. Ms. Woods stated that one of the challenges of the federal budget situation is that there has been a series of continuing resolutions instead of an annual budget, and so agencies have been slow to award grants. Mr. Donovan informed the CEDS Committee that in the past NMCOG had received \$ 50,000 in planning grant funds, while the latest grant provides for \$ 60,000.

NMCOG will apply for additional EDA short-term planning funds until the region is designated as an Economic Development District (EDD). Once an EDD is established, every community within the EDD would be eligible for EDA funds so long as any area within the EDD meets the eligibility requirements. Planning funds would then be made available over a three year period, eliminating the need to compete annually for these funds. Mr. Donovan noted that NMCOG plans to submit an economic development district application at the same time as its submission of the CEDS update.

Mr. Donovan stated that under NMCOG's current planning grant, two public forums are scheduled: one in March on brownfields and one in May on energy. He welcomed input from the CEDS Committee on scheduling the public forums, and specifically welcomed input from the Greater Lowell Workforce Investment Board (GLWIB) regarding their brownfields and energy skill training programs. Steve Sadwick asked what the target audience would be and Mr. Donovan responded that it would include economic development stakeholders in the region, such as community representatives, business owners, and the general public.

According to Mr. Donovan, the Montachusett Regional Planning Commission (MRPC) and NMCOG submitted an economic adjustment application to EDA in September for the Siting of Renewable Energy Facilities program. Based upon the feedback from EDA, MRPC and NMCOG will submit any additional information that is required. Under the grant, NMCOG would establish an Energy Committee that would work in tandem with the CEDS Committee. Mr. Donovan further stated that NMCOG reached out to UMass Lowell and Middlesex Community College in an effort to enhance the program, and is attempting to improve the application to the level desired by the economic development representative.

Mr. Donovan stated that NMCOG received a request from EDA for additional public works and economic adjustment projects. Currently, Lowell is the only municipality in the region eligible for public works funds, while some suburban communities, such as Billerica and Chelmsford, could be eligible for economic adjustment grants. Mr. Donovan indicated that he had spoken to EDA about developing an economic adjustment grant for Billerica, which had experienced extensive closures at the start of the recession, but that there was not much public support in Billerica to move forward.

4. Economic Development Initiatives

Ms. Woods stated that NMCOG received a grant from the Executive Office of Housing and Economic Development (EOHED) to prepare a Regional Strategic Plan (RSP). She indicated that the plan is focused on outlining the future priority development, priority preservation and future potential housing sites in the region and each community. In addition, the plan addresses each community's ability to meet the requirements of the proposed Land Use Partnership Act (LUPA) and to address the state's sustainable development principles. Ms. Woods further noted that the state would use the document as a basis for prioritizing statewide projects and making grant funding decisions. NMCOG has worked with each community to ensure that the priority development, priority preservation and future potential housing areas identified are consistent with their Master Plans and other documents.

Ms. Woods stated that before the final document is submitted to EOHED, it must be reviewed by each community and endorsed by each community's chief elected officials. She further stated that NMCOG has met with every community and we're just waiting for the endorsement from the Boards of Selectmen in Tyngsborough and Westford. Once these endorsements are received, the final RSP will be submitted to EOHED. Ms. Woods mentioned that also by next month, an official process will be established for amending the plan to accommodate new projects and local policy changes. She further mentioned that the priorities identified by the communities during this process, in regard to economic development initiatives, will be a factor in preparing the Annual CEDS Update.

Jerry Frechette prompted a discussion about several issues: adding an emphasis in the plan on training for non-green jobs; Greater Lowell Workforce Investment Board (GLWIB) job re/training initiatives; transitioning individuals from traditional manufacturing to green jobs; and the current state of the manufacturing sector. Mr. Donovan stated that an emphasis on non-green training programs can be included in the plan. Ms. Brown noted that the GLWIB is working on several job retraining initiatives, such as its implementation of a clean energy grant involving the training of 63 incumbent workers for clean energy jobs, as well as the training of dislocated and unemployed individuals for such jobs. Responding to a question from Mr. Frechette, Ms. Brown stated that green jobs require a different skill set than traditional manufacturing skills, and that individuals with traditional manufacturing backgrounds consequently require additional training. Responding to a question from Arthur Ford, Ms. Brown stated that the largest manufacturing sector is still comprised of a mix of traditional manufacturers, such as small businesses that are part of the supply chain for Raytheon and other large companies.

Responding to a question from Mr. Themelis, Mr. Donovan stated that the process for choosing companies and individuals in regard to job training works both ways: businesses approach for assistance and there is also outreach through the web and career centers. Responding to a question from Mr. Ford, Mr. Donovan stated that local academic institutions assist with job training. Ms. Brown remarked that one problem with working with academic institutions is that they run on a schedule, and so the GLWIB often cooperates with training vendors, such as Everblue, which have green specializations and grant certificates in a short period of time. Nonetheless, she mentioned that the GLWIB intends to expand its initiatives with local institutions.

Mr. Ford mentioned that he knows individuals who are unhappy with potential land takings associated with the expansion of the Middlesex Turnpike in Billerica. In response, Mr. Donovan reviewed the three phases of the turnpike project, and Ms. Woods mentioned that fair market value must be paid for takings and that land owners can contest compensation amounts.

Mr. Sadwick asked for clarification regarding the mentioning of Executive Order 418 on p.36. In response, Mr. Donovan explained the background of the order and noted that its status in regard to the plan would be confirmed.

Ms. Woods stated that NMCOG submitted a grant application to the EPA in November to establish a regional brownfield assessment program, and that a total of \$400,000 was applied for – half for hazardous substance assessments and half for petroleum assessments. Ms. Woods noted that the advantage of this program is that it allows communities to conduct assessments on sites within their boundaries and of their own choosing. Furthermore, she noted that the sites must not be municipally owned and that the assessment requires the commitment of the land owner. Ms. Woods mentioned that in the previous year, NMCOG submitted an application which did not receive funding and was then debriefed by the EPA on the application. Ms. Woods stated that one of the major challenges noted by the EPA was that several of NMCOG's communities were too affluent, and consequently, she stated that a greater emphasis on Lowell and other poorer communities was necessary. Responding to a question from Mr. Carvalho, Ms. Woods stated that the abundant past funding given to Lowell is probably not a disadvantage because the money was spent wisely.

Tanner Street Economic Development District Plan

Mr. Donovan stated that there was a public meeting about the project this past Monday and that more meetings are planned. He noted that the EDA is looking for NMCOG to partner with Lowell on the project as part of the CEDS process.

District Local Technical Assistance (DLTA) V Projects

Mr. Donovan stated that the projects are funded by the Department of Housing and Community Development with the purpose of enabling regional planning agencies to provide technical assistance to local communities. He further stated that municipal partnership and sustainable development projects are now being encouraged and that projects have been received from most communities. Mr. Donovan noted that every year, funding is only provided because the legislature overrules the administration, which initially never includes the funding in the budget. He further noted that he assumes that this year will be no exception. He also mentioned that there are 4 million dollars for community innovation challenge grants that are part of this line item and discussed NMCOG's application for a \$100,000 grant to work with communities to establish a regional stormwater utility. Responding to a question from Mr. Themelis, Ms. Woods stated that ideally, a governance structure would be established for the utility in which each community would have an equal voice. She also stated that the Lowell Regional Wastewater Utility should stand as a poor example of regional governance, since the suburban communities have been overburdened and Lowell wields the greatest influence.

Mr. Donovan stated that the purpose of this project would be to determine what type of agreement should be developed and to identify whether any legislation would be required. Ms. Woods noted that the end-product should consist of a report that discusses the elements just mentioned by Mr. Donovan as well as a draft intermunicipal agreement for communities to consider.

DOT Certification Review

Ms. Woods stated that on February 6, the United States Department of Transportation (USDOT) will work with NMCOG staff to conduct a federal certification review, which is required every fourth year. She noted that the point of the review is to prove that NMCOG is complying with all applicable federal regulations and laws. Ms. Woods stated that the USDOT staff will welcome input from local governments, boards, agencies, and committees that work with NMCOG, including the CEDS Committee. Ms. Woods also stated that there is a focus on ensuring that the transportation program addresses economic development needs and job creation, and encouraged CEDS Committee members to discuss the synergy between transportation and economic development in the CEDS document and process. Ms. Woods then discussed some of NMCOG's work for its transportation and economic development task in its work program with the Massachusetts Department of Transportation, and how through this work, NMCOG has tied together transportation and economic development in a broad and comprehensive manner.

EOHED's Economic Development Plan

Mr. Donovan stated that every administration is required to create an economic development plan. He noted that this plan seems more like a wish list and that problematically, it discusses economic and workforce development separately. Mr. Donovan stated that there has already been work in more southern portions of the 495 corridor, and that Secretary Bialecki likely intends to continue up the rest of the corridor, though he has not confirmed this intention. Mr. Donovan further stated that he assumes that Secretary Bialecki will be working with NMCOG and the Merrimack Valley Planning Commission in developing documentation expanding on the content provided in the plan. He also mentioned, however, that even though the document discusses working regionally, it makes no mention of regional planning agencies.

Mr. Frechette was pleased to note that on p.9, there is a discussion about significant gaps in key productivity in the area of middle skills jobs, and reiterated the importance of discussing the issue in the Regional Strategic Plan. Mr. Sadwick pointed out that in his view, the document is not simply a wish list: it states that benchmark measurements will be developed for its 55 action steps in the forthcoming months, and that outreach in the regions will be conducted over the next six months.

Various Topics/Conclusion

Ms. Woods discussed how initially, no guidance had been given regarding the format and content of the Regional Strategic Plan, and mentioned that there were significant format and content variations among the plans submitted. She stated that she was later told that plans should reflect the style of the 495/MetroWest Development Compact Study. Ms. Woods then continued to describe difficulties in working with the Massachusetts Association of Regional Planning Agencies.

A question from Mr. Ford prompted a discussion of the Lowell Junction Plan in Tewksbury. Mr. Sadwick explained how the project has been stalled in terms of both transportation and planning. Both Mr. Sadwick and Ms. Woods stated that the chief reason for the stalling of the project is a lack of funding, and Ms. Woods noted that the USDOT has not been interested in the project.

Mr. Donovan stated that the next CEDS Committee meeting is set for April 10, and that material, including the priority projects list, will be sent out ahead of time. Mr. Donovan then thanked everyone for attending the meeting.



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

April 10, 2012
12:00-2:00 P.M.

NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

A Multi-Disciplinary
Regional Planning
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Billerica
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Dracut
Dunstable
Lowell
Pepperell
Tewksbury
Tyngsborough
Westford

Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

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AGENDA

1. **Welcome**---Beverly Woods, Executive Director
2. **Approval of Minutes** – Beverly Woods
3. **Appointment of NMEDD members** – Jay Donovan
4. **Greater Lowell CEDS program** – Jay Donovan
 - Annual CEDS Update
 - Revised Timeframe
 - CEDS Priority Projects
 - Economic Development District application
 - Public Forums:
 - Brownfields
 - Energy
 - Siting of Renewable Energy Facilities Grant
5. **Other Economic Development Initiatives** – Jay Donovan
 - Pre-disaster Mitigation Plan
 - District Local Technical Assistance (DLTA) V projects
 - Regional Strategic Plan
6. **Next Meeting – June 12, 2012**
7. **Adjournment**

Greater Lowell CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

April 10, 2012

CEDS Committee Members: Jerry Frechette, Stacie Hargis Richard Howe Jr., Theresa Park, Steve Sadwick and Beverly Woods (ad hoc).

NMCOG Staff: Jay Donovan, and Nathaniel Strosberg

Welcome and Introductions

Beginning at 12:15, Beverly Woods, Executive Director of NMCOG, welcomed the CEDS Committee members and asked them to introduce themselves around the table.

1. Approval of Minutes

Ms. Woods stated that action will be deferred until the next meeting.

2. Appointment of NMEDD Members

Jay Donovan, Assistant Director of NMCOG, discussed the background of the Northern Middlesex Economic Development District (NMEDD), which serves as the non-profit arm of NMCOG focusing principally on economic development and housing projects within the suburban communities. Mr. Donovan indicated that there was a need to reappoint Barbara O'Neil and Bill Lipschitz to NMEDD and to replace Jeanne Osborn and Mark Scolnick, who had left the CEDS Committee. Mr. Donovan indicated that Danielle Bergeron was willing to replace Jeanne Osborn and that Steve Sadwick was a good candidate to replace Mark Scolnick. On a motion by Jerry Frechette and a second by Steve Sadwick, the Committee voted unanimously to reappoint Barbara O'Neil and Bill Lipschitz and to appoint Danielle Bergeron and Steve Sadwick to replace Jeanne Osborne and Mark Scolnick to NMEDD respectively. Mr. Donovan indicated that these appointments would be presented at the Council meeting for their concurrence.

3. Greater Lowell CEDS Program

Annual CEDS Update

Mr. Donovan discussed the CEDS Priority Project Status Report, noting that the report tracks all projects listed in the previous CEDS document and that it identifies all completed projects as well as projects still underway. Mr. Donovan stated that the updated project information was

obtained from member communities except for transportation projects, which were updated by NMCOG transportation staff. Mr. Donovan noted that there are currently few non-profit projects on the list and invited meeting attendees to provide details on any relevant non-profit or private sector projects.

There was a brief discussion on Tewksbury's East/Livingston Streets and East/Shawsheen Streets projects. Mr. Sadwick mentioned that the East/Livingston Streets project has been completed and that Tewksbury is now working with MassDOT on the design for the East/Shawsheen Streets project.

Jerry Frechette asked how a project financed by the private sector would be included on the list? Mr. Donovan responded that it probably would not qualify unless it was a major economic development project, a major housing project, or something similar. He further noted that information on such projects is usually provided by communities due to permitting requirements and public funding opportunities, but that Mr. Frechette is welcome to provide NMCOG with any information on other projects if pertinent.

A discussion then ensued about future development projects with Ms. Woods recommending that the next phase of Massachusetts Mills be added to the list. Theresa Park noted that there are several projects that will commence in Lowell within two to four years, including additional work in the Lawrence Mills area. Ms. Park offered to provide NMCOG with information on those projects.

The start date and cost of the Lord Overpass project was raised as a question and the Lowell Junction project should be moved to the long-term category on the list. Ms. Woods stated that the Dracut High School project should be added to the list as well as the Princeton Properties project in Westford. Ms. Woods also discussed the Route 110/Tadmuck Road project in Westford, noting that although it was designed as a private mitigation project, it go through the MassDOT approval process. Other projects discussed included River's Edge, the Yankee Doodle Bike Path, the MassWorks projects, and a small business redevelopment project that Stacie Hargis is working on with the Town of Billerica.

Mr. Donovan reviewed the projects under the Multiple Communities and Greater Lowell Workforce Investment Board (GLWIB) categories. He also discussed the LRTA projects and emphasized the Gallagher Terminal restructuring/redevelopment project. Regarding the Annual CEDS Update schedule, Mr. Donovan stated that the priority projects would be approved at the June 12th meeting and the final *Annual CEDS Update for 2010-2012* would be recommended for approval to the Council at the September 11th meeting. The Council would be asked to approve the document at their September 19th meeting and the document would then be submitted to EDA by the end of the month.

Economic Development District Application

Mr. Donovan noted that the goal is to complete the EDD application in tandem with the completion of the *Annual CEDS Update for 2010-2012*. Once the EDD application is approved, NMCOG would receive a three year planning contract from EDA instead of having to compete annually for funding. Based upon this approval, all the Greater Lowell communities would be eligible for EDA funding so long as any areas within the region meeting the EDA eligibility requirements.

Public Forums

Mr. Donovan stated that NMCOG has been waiting for information from EPA on its brownfields application and hoped to hold the Brownfields forum in concert with a funding announcement. He also noted that the EDA had asked NMCOG to work with the City of Lowell on the Tanner Street project and that it would be helpful to include the project in the forum. Mr. Donovan stated that a representative from the City of Lowell would be included on the brownfields panel.

Regarding the Energy forum, Mr. Donovan stated that NMCOG was awaiting word from EDA on the joint NMCOG/MRPC (Montachusett Regional Planning Commission) Siting of Renewable Energy Facilities grant application. Under this program, there would be six energy workshops - three in the NMCOG region and three in the MRPC region. He noted that NMCOG is currently searching for panel speakers and that he may be in touch with Ms. Park about potential companies that could participate. The Energy forum under our planning grant would then complement these other activities.

Stacie Hargis added that the Women's Bureau of the Department of Labor has been promoting green jobs for women and that the bureau is interested in holding panels and workshops on this initiative. She also pointed out the work of the Lowell Green Restaurant Committee.

Siting of Renewable Energy Facilities Grant

Mr. Donovan stated that the grant would provide \$ 188,512 k in EDA planning assistance funds for an 18 month project to be jointly implemented by NMCOG and MRPC. NMCOG would be establishing a separate Energy Committee to work in tandem with the Greater Lowell CEDS Committee. EDA recently sent out a Merits Further Consideration (MFC) letter, which outlined the final materials that NMCOG and MRPC would need to submit for final funding consideration. NMCOG and MRPC plan to submit the material by the due date of April 13, 2012 and, hopefully, have funding in place by July 1st.

4. Other Economic Development Initiatives

Pre-Disaster Mitigation Plan

Ms. Woods discussed the requirement for a Regional Hazard Mitigation plan, noting that the plan would analyze natural hazards that could potentially impact the region and outline preventative mitigation measures. There was then a discussion about FEMA's new emphasis on input from the business community and utilizing the CEDS Committee as a vehicle for collecting such input. Ms. Park asked if the plan would only address natural disasters. Ms. Woods responded that there will be general information regarding man-made hazards in the document, although the plan will only outline mitigation actions for natural hazards.

District Local Technical Assistance (DLTA) V Projects

Mr. Donovan reviewed NMCOG's DLTA V projects and noted that there are additional DLTA resources available. He stated that the second Request for Proposals (RFP) would be sent out shortly and that those communities that didn't respond to the initial RFP could respond to this one. He also stated that NMCOG had submitted another application to the State 911 Department

for funding on the next phase of the Feasibility Study for seven of the nine NMCOG communities.

Regional Strategic Plan

Ms. Woods described how NMCOG has been developing a regional strategic plan with grant funding from the Executive Office of Housing and Economic Development (EOHED). She noted that the focus of the effort has been to work with local communities to identify priority economic development and preservation areas, as well as future housing sites. Ms. Woods noted that plan adoption was crucial for local communities because the state is tying the Regional Strategic Plan to future state funding decisions.

5. Next Meeting

Based upon the revised schedule, Mr. Donovan stated that the next meeting would be scheduled for Tuesday, June 12, 2012.

6. Adjournment

Based upon a motion by Steve Sadwick and a second by Jerry Frechette, the Committee voted unanimously to adjourn the meeting at 1:25 P.M.



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

June 12, 2012

12:00-1:00 P.M.

NMCOG Conference Room

40 Church Street, Suite 200, Lowell, MA

A Multi-Disciplinary
Regional Planning
Agency Serving:

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Dunstable
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Pepperell
Tewksbury
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Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

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AGENDA

1. **Welcome**---Beverly Woods, Executive Director
2. **Approval of Minutes** – Beverly Woods
3. **Scheduling of NMEDD meeting** – Jay Donovan
4. **Greater Lowell CEDS program** – Jay Donovan
 - Annual CEDS Update
 - Revised Timeframe
 - Approval of CEDS Priority Projects
 - Economic Development District application
 - Public Forums:
 - Brownfields
 - Energy
 - Siting of Renewable Energy Facilities Grant
5. **Other Economic Development Initiatives** – Jay Donovan
 - Pre-disaster Mitigation Plan
 - District Local Technical Assistance (DLTA) V projects
 - Transportation Improvement Program (TIP)
6. **Next Meeting – September 11, 2012**
7. **Adjournment**

CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

June 12, 2012

CEDS Committee Members: Danielle Bergeron, Gail Brown, Arthur Ford, Jerry Frechette, Richard Howe, Steven Joncas, Theresa Park, Steve Sadwick, and Stephen Themelis

NMCOG Staff: Jay Donovan, Nathaniel Strosberg, and Beverly Woods

1. Welcome and Introductions

At 12:07 P.M., Beverly Woods, Executive Director of NMCOG, welcomed the CEDS Committee members to the meeting and asked them to introduce themselves around the table.

2. Approval of Minutes

Ms. Woods noted that the first word of the third line on the final page of the April 10th meeting minutes should be changed from *along* to *although*. Based on a motion by Theresa Park and a second by Steve Sadwick, the Committee voted unanimously to approve the meeting minutes.

3. Scheduling of NMEDD Meeting

Mr. Donovan discussed the appointment and reappointment of members to the NMEDD, which occurred at the last CEDS meeting, and noted that the annual NMEDD meeting will be held in September.

4. Greater Lowell CEDS Program

Annual CEDS Update – Revised Timeframe

Mr. Donovan reviewed the revised CEDS timeframe, which emphasizes approval of the CEDS Priority Projects at this meeting and then approval of the CEDS document at the September 11th meeting. He further noted that there would be a council vote on the document on September 19th and that the document would be submitted to the EDA by the end of the month.

Annual CEDS Update – Approval of CEDS Priority Projects

Mr. Donovan emphasized that the purpose of the list is to identify projects that meet the eight CEDS goals. He also discussed the CEDS Priority Project Status Report, noting that it lists

projects that have been completed, such as the EDA Planning Grant (2008) and various LRTA projects, as well as projects underway and dropped.

Mr. Donovan stated that construction of short-term projects will commence within 18 months and mentioned that some of these projects have been on the list for awhile, such as the Hamilton Canal and JAM Plan. Steven Joncas noted that the Community Health Center Expansion project, which is included on the short-term list as part of the Hamilton Crossing project, would be complete by December 7th. Mr. Donovan then discussed other short-term projects on the list.

Regarding the Hamilton Crossing Project, Mr. Joncas pointed out that Mills 2 and 4 should be placed on the intermediate list, while Mill 6 should remain on the short-term list. Regarding the Town of Dunstable's Water Line Upgrade project mentioned on the short-term list, Mr. Joncas noted that the town's mixed-use development district is tied to the water line and that Walter Alterisio should be consulted about the project's status. Ms. Woods stated that a meeting had been scheduled with Mr. Alterisio for June 14th and that the Town of Dunstable is looking to apply for MassWorks funding for the project.

Danielle Bergeron asked if Ms. Woods could briefly discuss the Wood Street/Rourke Bridge Study, which is mentioned on the short-term list, and inquired as to whether a bridge is being considered. Ms. Woods noted that a consultant is currently analyzing traffic patterns to develop short-term improvements and is also examining the viability of constructing a permanent river crossing to replace the Rourke Bridge.

Mr. Donovan verified that the Pepperell Paper Mill project has been added to the long-term projects list. He then discussed other long-term projects including the Lowell Junction Interchange, Lord Overpass/Thorndike Street, Downtown Trolley Extension, and the Yankee Doodle Bike Path.

Based on a motion by Jerry Frechette and a second by Steven Joncas, the Committee voted unanimously to approve the CEDS Priority Projects.

Economic Development District Application

Mr. Donovan noted that the Economic Development District application is being completed in tandem with the annual CEDS Update.

Public Forums – Brownfields

Mr. Donovan stated that the EPA has twice rejected grant applications, which were, in fact, submitted at their urging. He further stated that the EPA considered the region's suburban communities to be too well-off to receive funding. Mr. Donovan noted that he was working to set up the forum as soon as possible.

Public Forums – Energy

Mr. Donovan stated that the energy forum would probably take place at some point in September. Mr. Joncas asked if the objective of this process is to examine potential alternative energy sites. Mr. Donovan responded in the affirmative and noted that there has been cooperation with local communities to try to make the permitting process easier for developers. Mr. Joncas also asked whether firms engaged in alternative energy development have been



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

A Multi-Disciplinary
Regional Planning
Agency Serving:

June 4, 2013
12:00-1:30 P.M.
NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

Billerica
Chelmsford
Dracut
Dunstable
Lowell
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Tewksbury
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Stephen C. Themelis
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AGENDA

1. **Welcome**---Beverly Woods, Executive Director
2. **Greater Lowell CEDS program** – Jay Donovan
 - Annual CEDS Update for 2010-2012
 - Updated Data
 - Approved CEDS Priority Projects
 - Energy section
 - Siting of Renewable Energy Facilities Grant
 - Work plan
 - Workshops
 - Plan sections
 - Investing in Manufacturing Communities Partnership
 - CEDS Planning Grant application
 - Economic Development District application
3. **Other Economic Development Initiatives** – Jay Donovan
 - Westford Economic Target Area (ETA) application
 - District Local Technical Assistance (DLTA) VI projects
 - Transportation/Economic Development projects
4. **Next Meeting**
5. **Adjournment**

CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

June 4, 2013

CEDS Committee Members: Bill Lipchitz (CTI), Gail Brown (GLWIB), Arthur Ford (Sullivan and Bille), Steven Joncas (Lowell Plan), Theresa Park (City of Lowell), Steve Sadwick (Town of Tewksbury), Chris Kluchman (Town of Westford)

NMCOG Staff: Jay Donovan, Beverly Woods, Danielle Mucciarone

1. Welcome and Introductions

Beverly Woods, Executive Director of NMCOG, welcomed the CEDS Committee members to the meeting and asked them to introduce themselves.

2. Greater Lowell CEDS Program

Jay Donovan provided an overview of the CEDS planning process and summarized the progress made as follows:

Updated Data: NMCOG received new and updated demographic and economic data which was included with the meeting materials. CEDS Committee members are encouraged to review this information and contact NMCOG staff with any questions or corrections they may have.

Approved CEDS Priority Projects

The Short-Term, Intermediate, Long-Term and Completed Project Lists were included with the meeting materials for this meeting. Over the new few weeks, NMCOG staff will be reaching out to CEDS committee members and the local communities to determine if there are other projects that should be included in the priority project lists. If necessary, an updated list will be provided at the next meeting.

Energy Section

Danielle Mucciarone described the Clean Energy Section of the CEDS document, which includes the current energy initiatives in Massachusetts, with a focus on solar energy, wind energy, regional renewable energy initiatives, Green Communities, green jobs and tools and incentives for renewable energy and energy conservation. This section is designed to showcase

Massachusetts' diverse portfolio of policies and incentives to encourage job growth in the clean energy sector.

Jay Donovan then discussed the Siting of Renewable Energy Facilities Grant, which is a joint project between the Northern Middlesex Council of Governments (NMCOG) and the Montachusett Regional Planning Commission (MRPC). NMCOG and MRPC were awarded \$188,512 in grant funding from EDA to develop a plan for the Siting of Renewable Energy Facilities in the Northern Middlesex and Montachusett regions. The goal of the plan is to outline actions and measures that encourage the siting of renewable energy facilities within the NMCOG and MRPC communities. The plan will include an Assessment and Analysis of Wind Energy Conversion Systems, Geothermal Energy, Photovoltaics, Hydropower, Biomass and a region-wide Renewable Energy Manufacturing Lands Inventory and Assessment. As part of the project, both organizations have formed Energy Advisory Committees. NMCOG staff attended the MRPC Energy Advisory Committee meetings on October 12, 2012 and January 18, 2013. The MCOG Energy Advisory Committee has held meetings on December 13, 2012, and March 28, 2013.

Under this grant, NMCOG and MRPC are hosting six community workshops. The first community workshop on Wind Energy Siting was held at the Montachusett Area Regional Transit (MART) facility in Leominster on February 12, 2013. The second community workshop, which was focused on Solar Energy Siting, was held on April 23, 2013 at the Middlesex Community College Federal Building, in Lowell, MA. The next workshop, which NMCOG is organizing, will be on Renewable Energy in Historic buildings.

NMCOG staff is currently working on the Photovoltaics and LEED sections of the report. Danielle Mucciarone stated that she has begun researching and compiling information on solar efforts in the region, including current installations, incentives, zoning bylaws and regulations. It is anticipated that a draft of the Photovoltaics section will be completed by the end of August. The LEED section of the report is also underway. MRPC is working on the Access and Transportation section and the Wind Energy section of the report.

3. Other Economic Development Initiatives -Jay Donovan

a. Westford Economic Target Area (ETA) application

NMCOG has provided the Town of Westford with technical assistance in their application to establish an Economic Target Area. If approved by the Economic Assistance Coordinating Council, this designation will allow Westford to be eligible for state Brownfield funding, and would allow the Town to offer tax incentives to businesses planning to locate in the area.

b. District Local Technical Assistance (DLTA) VI projects

Jay provided an overview of the DLTA activities that are underway, including the preparation of Housing Production Plans for the communities of Dracut, Pepperell and Billerica, as well as the development of a Regional Housing Plan. NMCOG will no longer be moving forward with the Regional HOMES Consortium, due to the fact that the project was found to be financially infeasible.

Under the DLTA VI program, NMCOG is developing Economic Development Strategies for the Town of Billerica and Dracut, and is assisting the Town of Chelmsford with a Business Outreach Program for business along the Route 129 Corridor. Staff is also assisting Chelmsford with creating a Strategic Action Plan for Vinal Square. In addition, NMCOG staff is working with the Town of Dracut to enact zoning changes within the Town Center that will foster mixed-use development. Furthermore, staff is assisting the Town of Westford in their efforts to become a state-designated Green Community.

c. Transportation/Economic Development projects

Beverly Woods stated that NMCOG is in the process of completing a feasibility study for replacing the temporary Rourke Bridge with a permanent structure. In addition, NMCOG has been working with the Nashua Regional Planning Commission to evaluate the feasibility of adding a southbound off-ramp at Exit 36 on U.S. Route 3. The Town of Tyngsborough and the City of Nashua view this project as being vital to the continued economic vitality of Middlesex Road and Daniel Webster Highway corridor. Staff has also been assisting the Town of Westford with the planned improvements along the Route 110 Corridor.

4. Next Meeting

The next meeting will be scheduled for July 23 or July 30 at noon.

5. Adjournment

The meeting adjourned at 1:30pm.



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

July 23, 2013
12:00-1:00 P.M.

NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

A Multi-Disciplinary
Regional Planning
Agency Serving:

Billerica
Chelmsford
Dracut
Dunstable
Lowell
Pepperell
Tewksbury
Tyngsborough
Westford

Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

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AGENDA

1. **Welcome**---Beverly Woods, Executive Director
2. **CEDS Grant Extension Request** – Jay Donovan, Assistant Director
3. **Northern Middlesex Econ. Development District** – Jay Donovan
4. **Annual CEDS Update** – Jay Donovan
 - Updated CEDS Priority Projects
 - Needs Analysis Section
5. **Siting of Renewable Energy Facilities Plan** – Jay Donovan
6. **Other Economic Development Initiatives** – Jay Donovan
 - District Local Technical Assistance (DLTA) VI projects
 - Dracut Economic Development Strategy
 - Village Center Overlay District for Dracut
 - Billerica Economic Development Strategy
 - Chelmsford Business Outreach Program
 - Strategic Action Plan for Vinal Square
 - Westford Solar Bylaw & Permitting
 - DLTA VII funding
7. **Next Meeting – October 8, 2013**
8. **Adjournment**

Greater Lowell CEDS Committee Meeting
 NMCOG Conference Room
 40 Church Street, Suite 200
 Lowell, MA 01852

Meeting Minutes
 July 23, 2013

CEDS Committee Members: Arthur Ford (Sullivan Bille, P.C), Bill Lipchitz (CTI), Chris Kluchman (Town of Westford), Gail Brown (GLWIB), Jerry Frechette (Washington Savings Bank), Richard Howe (Registry of Deeds), Steven Joncas (Lowell Plan), Steve Sadwick (Town of Tewksbury), Theresa Park (City of Lowell),

NMCOG Staff: Jay Donovan, Beverly Woods, Danielle Mucciarone, Nancy Schiavone

1. Welcome - Beverly Woods, Executive Director

Beverly Woods, NMCOG Executive Director, welcomed the CEDS Committee members to the meeting and asked them to introduce themselves.

2. CEDS Grant Extension Request - Jay Donovan, Assistant Director

Jay Donovan informed the Committee members that a grant extension has been request from EDA. The extension request will give NMCOG additional time to complete the Needs Analysis section for the CEDS, and solicit comments on the draft document from the project stakeholders. In addition, NMCOG will be developing an economic development district (EDD) application, which would provide the region with a three-year grant, if approved.

3. Northern Middlesex Economic Development District - Jay Donovan

Jay Donovan updated the Committee on the status of the NMEDD. He outlined the current membership, and noted the need to address the CEDS Committee appointments and NMCOG appointments.

4. Annual CEDS Update -Jay Donovan

Jay Donovan updated the Committee on the various components of the 2010-2013 CEDS Update. NMCOG staff has updated the project list for short-term, intermediate and long-term projects based on input received from the Committee, local communities and other project stakeholders. Projects that are underway or completed were moved to the appropriate lists.

Jay reviewed the short-term, intermediate and long-term projects, as well projects that were completed or are underway. He emphasized that long-term projects are 5+ years away in terms of implementation. Jay reiterated that updating the priority project list is important so that eligibility for EDA funding is maintained. In addition, having a project on the list may put the project at an advantage when it comes to securing funding from other funding sources. Beverly indicated that for transportation projects in particular, the project costs will need to be periodically updated as the project gets closer to implementation.

Jay requested that additional updates be submitted no later than October 1st. He encouraged Committee members to review the projects and contact NMCOG staff if there are inaccuracies.

Chris Kluchman stated that she will send information on the Westford fire station project to Danielle. Theresa Park asked if additional information on the Hamilton Canal District should be included, as the City has applied for a TIGER grant to fund the offsite traffic improvements. Beverly responded that that project is already included in the list.

Jay Donovan noted that a draft Needs Analysis section is being developed and will be available for the next meeting.

5. Siting of Renewable Energy Facilities Plan -Jay Donovan

Jay described scope of work for the Renewable Energy Siting grant funded through EDA. The project is being undertaken in partnership with the Montachusett Regional Planning Commission (MRPC). NMCOG and MRPC are working closely together to promote economic development within the renewable energy industry. NMCOG has formed the Northern Middlesex Energy Advisory Committee (EAC), which has representatives from local communities, higher education and the private sector. The last EAC meeting took place on 6/27/2013 and the next meeting is scheduled for 9/26/2013.

NMCOG is currently working on the LEED and Solar sections of the report, and the Montachusett Regional Planning Commission (MRPC) is working on the wind energy section. Danielle Mucciarone provided an overview of the LEED section of the draft report, which includes a discussion of steps that communities have taken promote LEED (e.g. through zoning and building code), as well as a discussion of the opportunities and barriers associated with LEED. The section includes recommendations in terms of how the NMCOG and MRPC regions can promote LEED certified development throughout the regions. The draft will be completed over the next few weeks.

The solar section currently provides background information, and contains a list of existing solar facilities. In addition, information on current planning and zoning regulations and incentives is provided. The section also discusses barriers to development, and contains recommendations for facilitating the siting of solar installations.

In accordance with the grant scope of work, NMCOG will be scheduling a workshop on renewable energy in historic buildings, while MRPC is scheduling a hydropower workshop.

6. Other Economic Development Initiatives -Jay Donovan

Jay Donovan stated that NMCOG recently assisted Westford in completing an Economic Target Area (ETA) application. The application will be reviewed by the Economic Assistance Coordinating Council (EACC). The Chris Kluchman described how Westford is working with Littleton and Boxborough to establish a Transportation Management Association (TMA). She also noted that the recent Red Hat Expansion has added about 100 jobs in Westford.

Steve Joncas asked if Westford is pursuing an extension of public transit service to Farmer's Way. Beverly Woods responded that the most logical way to provide service to that area is to extend the North Chelmsford route, however, the Town will need to submit a request for such an

extension to the LRTA to reevaluate the route. Chris Kluchman stated that the TMA is working to set up private shuttle services for the businesses located along Route 110.

Jay Donovan provided an overview of the DLTA VI projects that are underway. He noted that there are several projects related to housing production and economic development. NMCOG staff is assisting the towns of Billerica, Dracut, and Pepperell with the development of a Housing Production Plan. In addition, work is also underway on a Regional Housing Plan. An Economic Development Strategy is being prepared for the Towns of Billerica and Dracut.

Jay noted that staff is assisting the Town of Chelmsford in developing a Strategic Action Plan for Vinal Square, as we recommended in the Town's Master Plan. A business survey and business outreach program is also underway for the businesses located along the Route 129 corridor in Chelmsford. This work is being completed to determine whether there is a need for support services for businesses located along the corridor. NMCOG continues to work with the Town of Dracut on an overlay zoning bylaw and design guideline for the Town Center. It is expected that Town Meeting will vote on the zoning changes at Fall Town Meeting.

Jay stated that NMCOG is assisting the Town of Westford in their efforts to become a designated Green Community, as certified by the Massachusetts Department of Energy Resources (DOER). Danielle described how NMCOG is specifically assisting with Criteria 1 and 2 of the Green Communities application. To comply with Criteria 1 a community must allow as-of-right siting for renewable energy generation, research or manufacturing, and to comply with Criteria 2, a community must allow expedited permitting.

Jay informed the Committee that NMCOG worked with the City of Lowell to submit an application to the Federal Reserve Bank under the Working Cities Challenge Grant Program. The program is designed to create transformative change in Gateway Cities. The City of Lowell application focuses on immigrant entrepreneurship. Local banks have agreed to assist with a loan pool and access to capital.

Steve Sadwick stated that the Town of Tewksbury will hold a special election to revise the Zoning Bylaw to allow a slot parlor as a permitted use. The Gaming Commission will ultimately select one community for the siting of the slot parlor facility. The host community and surrounding community designations were discussed, as outlined in the gaming regulations. Beverly Woods added that although a community can request to be designated a surrounding community, the final decision ultimately rests with the applicant.

7. Next Meeting -October 8, 2013



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

A Multi-Disciplinary
Regional Planning
Agency Serving:

October 22, 2013
12:00-1:00 P.M.
NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

AGENDA

Billerica
Chelmsford
Dracut
Dunstable
Lowell
Pepperell
Tewksbury
Tyngsborough
Westford

Stephen C. Themelis
Chair

Beverly A. Woods
Executive Director

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1. **Welcome**---Beverly Woods, Executive Director
2. **Greater Lowell CEDS program** – Jay Donovan
 - EDA Planning Contract Extension
 - Annual CEDS Update for 2010-2012
 - Updated CEDS Priority Projects
 - Energy section
 - Siting of Renewable Energy Facilities Grant
 - Workshops – Hydropower and Historic Buildings
 - Plan sections – Wind Energy and LEED
 - Energy Advisory Committee
 - CEDS Planning Grant application (Five Year CEDS)
 - Economic Development District application
3. **Other Economic Development Initiatives** – Jay Donovan
 - District Local Technical Assistance (DLTA) VI projects
 - Billerica and Dracut Economic Development Strategies
 - Vinal Square Strategic Action Plan
 - Dracut Village Center Overlay District
 - Chelmsford Business Outreach Program
 - Westford Solar Bylaw and Permitting Plan
 - Westford EOA and TIF Zone applications
4. **Next Meeting** – December 10, 2013
5. **Adjournment**

Greater Lowell CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

October 22, 2013

CEDS Committee Members: Arthur Ford (Sullivan Bille, P.C), Bill Lipchitz (CTI), Chris Kluchman (Town of Westford), Gail Brown (GLWIB), Jerry Frechette (Washington Savings Bank), Richard Howe (North Middlesex Registry of Deeds), Steven Joncas (Lowell Plan), Stacie Hargis (Merrimack Valley Small Business Assistance Center), Steve Sadwick (Town of Tewksbury), and Theresa Park (City of Lowell)

NMCOG Staff: Jay Donovan, Beverly Woods, Danielle Mucciarone

1. Welcome - Beverly Woods, Executive Director

Beverly Woods, Executive Director, NMCOG, welcomed the CEDS Committee members to the meeting and asked them to introduce themselves.

2. Greater Lowell CEDS Program – Jay Donovan

A. EDA Planning Contract Extension

Jay Donovan reported that NMCOG's contract extension was granted and that project is scheduled to be completed by the end of December. Jay advised that the next CEDS meeting has been scheduled for December 10, and that NMCOG will produce a draft of the document for the Committees review at that meeting. The NMCOG Council will then be asked approve the document for submittal to EDA.

B. CEDS Update for 2010-2012

Jay Donovan updated the committee with regard to progress on various sections of the CEDS Update. Jay noted that NMCOG staff updated the Priority Project list. He asked that the Committee review the project listing to ensure that the information is accurate and complete. Jay asked Theresa Park if the Upper Merrimack improvement projects are done, and if they can be moved to the completed list. Theresa indicated that they are not complete yet.

Jay asked Theresa if the Downtown Lowell transportation improvements are complete. Theresa indicated that the activities could probably be moved to the completed projects section, but she will confirm this is the case and report back. Jay indicated that NMCOG made adjustments to the transportation projects to schedule them based on the calendar year as opposed to the fiscal year.

Jay requested that the Committee provide feedback by the end of the month and contact himself or Danielle for any further information.

Jay stated that a draft energy section was provided to the Committee at the last meeting, and requested that the Committee provide comments by the end of the month.

3. Siting of Renewable Energy Facilities Grant

Jay reported that NMCOG is working with Montachusett Regional Planning Commission (MRPC) on a grant for the Siting of Renewable Energy Facilities. Two workshops are scheduled and flyers will be sent, advertising the sessions. The first workshop is will address hydropower and will be hosted by MRPC on November 7. The event will take place at the Pepperell Town Hall at 1:30 p.m., with a tour of the Pepperell Hydropower Facility to follow at 2:45p.m.

NMCOG will host the second workshop on Renewable Energy in Historic Buildings. The event will take place at Middlesex Community College in Lowell from 6-7:30 p.m. on November 18th. Three speakers are lined up for the workshop: a staff member from the Lowell Department of Planning Department will talk about the Ramp-up Energy project; Gregg Croteau, Executive Director at UTEC, will talk about the UTEC building and LEED Certification process; and Ken Koornneef from Nobis Engineering will talk about LEED Certification and brownfields development. A light dinner will be provided.

- Plan Sections – Wind Energy and LEED

MRPC has developed the draft Wind Energy section and NMCOG has prepared the draft LEED section. Jay asked if the Committee would be interested in reviewing and commenting on this work. Jay advised that NMCOG is working on other sections, including the solar section, and that there is an Energy Advisory Committee meeting scheduled for December.

4. Economic Advisory Committee

A. CEDS Planning Grant application (Five Year CEDS)

Jay advised that NMCOG will need to prepare a grant application to request funding for the Five-Year CEDS over the upcoming months. He added that this process will begin early next year.

B. Economic Development District Application

Jay stated that the NMCOG is drafting an EDD application, as discussed at the previous meeting. He added that the agency plans to hire an economic development and housing planner by the end of the month.

5. Other Economic Development Initiatives

Jay Donovan stated that NMCOG has learned that it will receive another round of District Local Technical Assistance (DLTA) funding for the upcoming year. Jay noted that the contract was received yesterday. The DLTA funding focuses on the following three areas:

- Planning for Growth (e.g. Economic development projects)
- Planning for Housing (e.g. Housing projects)
- Municipal Partnerships and regional-type projects (e.g. Regional 911, joint procurement, etc.)

Jay then provided the following updates on the District Local Technical Assistance (DLTA) VI Projects:

A. Dracut Economic Development Strategy

Jay stated that NMCOG is working with the Town of Dracut to develop an Economic Development Strategy. There will be a SWOT session for the public on Thursday, October 24th. There will also be a morning SWOT session on October 30th for the Dracut business community.

B. Billerica Economic Development Strategy

Jay reported on the commencement of the Billerica Economic Development Strategy. NMCOG had its first meeting with Billerica Economic Development staff in August. Follow-up with staff is required before continuing work.

C. Vinal Square Strategic Action Plan

Jay reported on the progress of the Vinal Square Strategic Action Plan. NMCOG held a SWOT session for the public on October 3rd, and another session is scheduled for the business community on November 7th. Over 60 people attended the first public session. Steven Joncas asked what types of comments had been received. Jay responded that all many varied opinions were expressed in terms of the types of activities the community wanted, transportation issues, and zoning issues.

Beverly Woods added that the Town's Master Plan recommended mixed-use zoning for the Square to allow residential, commercial and retail uses. There are two groups in that neighborhood: Those who have lived in the community for a long time, and the younger professionals who have moved in recently and want more vibrancy, active uses and more family activities. The two groups have different perspectives on the future of the area.

Steven Joncas asked if the Mill Complex comes into play in those discussions. Beverly responded that the mills are within the study area and that there is discussion of creating a mill reuse overlay district. The primary focus of the project is on the Square itself, and the need for façade improvements, historic preservation, pedestrian accommodations and traffic improvements.

D. Dracut Village Center Overlay District

Beverly Woods provided an update on the Dracut Village Center project. The project goal is create a true town center and build off of the investments that have been made in the library and new town hall. The Town is interested in a mixed-use bylaw to create a more typical town center character in the future. Toward that end, corresponding design guidelines have been developed that will complement the proposed zoning changes.

Beverly will be appearing before the Board of Selectman to discuss the zoning bylaw and will then go before the Town meeting on November 4th.

Steven Joncas asked for clarification on the location of the proposed town center boundaries and several members of the Committee discussed various aspects of the project. Jerry Frechette

indicated that he thought the gazebo near the High School has more of a community feel than where the library and town hall are located, which will be a challenge for the project.

E. Chelmsford Business Outreach Program

Jay Donovan reported on NMCOG's work with Chelmsford on the business outreach program for the Route 129 businesses. The Chelmsford Master Plan recommends that the zoning bylaw be amended to allow for support services, such as restaurants, in that area. Chelmsford requested that NMCOG put together a survey for employees, business managers, HR directors and Facility Managers to further identify the service needs of businesses and employees in the Route 129 area.

NMCOG held a session with Route 129 businesses last week. Two surveys were then developed using Survey Monkey, which will allow the surveys to be completed online. NMCOG is waiting for a list of contacts from the Town in order to distribute the surveys. Jay stated that it is hoped that the survey will go out to businesses within the next week or so, which would allow a three weeks for responses. NMCOG will then pull together the results and have another business roundtable with the Town and the Economic Development Commission.

Jerry asked if providing these services would require any zoning amendments. Jay responded that initially the town manager wanted the survey as justification to amend zoning, but the Chelmsford Business Association is opposed to any zoning revisions, as they feel it will impact businesses in the other areas of Chelmsford.

Jay mentioned that the study is also trying to figure out the needs of the businesses, in terms of hotels not being adequate for many businesses. Many of the businesses, which are high-tech, are using facilities in Burlington rather than in Chelmsford. It was noted by Jay that currently hotels are not an allowed use in the corridor.

Jay provided further detail on a number of the survey questions and also clarified that there were 6-8 businesses in attendance at the business meeting – with representation from HR, owners, and facility managers. Steven Joncas asked if Kronos and Comcast participated. Jay responded that Kronos attended.

F. Westford Solar Bylaw and Permitting Plan

Danielle provided an update on the Solar Bylaw and Permitting Plan for Westford. NMCOG started out by assisting the community in its application for Green Community designation through the State's Green Communities Program. It turned out that Westford already met Criteria 1 and 2 through their existing zoning regulations and permitting procedures, so NMCOG assisted the Town in drafting a letter explaining how the two criteria were met. The Town is still interested in preparing a Solar Bylaw, given the solar developments that are happening in the area.

NMCOG has been providing the Town with initial technical assistance throughout the application process and will be reviewing their Energy Reduction Plan (ERP). NMCOG has also been assisting with their Stretch Energy Code and attended a Town meeting and builder's forum on that topic. Jerry asked about participation from the community at the Stretch Code meetings. Danielle indicated that there was low participation at the builders forum, but there were more

people (around 10-15) at the public meeting. Attendees were most concerned about the additional cost burden to builders and homeowners of building 'green'. Typically, the additional cost is between \$1,000 and \$5,000, but one builder indicated that because of the rebates and pricing incentives it is not costing that much.

G. Westford Economic Target Area (ETA) and Tax Increment Financing (TIF) Zone applications

Jay informed the Committee of NMCOC's work with Westford in relation to last year's Economic Target Area application. Westford is now working on TIF Zone application. The Town is very pleased with the additional status provided by the ETA. Jay indicated that there is considerable economic development occurring in Westford, which is a big change from 5-10 years ago. With the success that the Town had with Red Hat, other businesses coming in see the Economic Development Incentive Program (EDIP) tools as an attraction.

6. Next meeting - December 10, 2013

The next meeting was scheduled for December 10th. Jay advised that Committee meeting members will have a draft CEDS document to review. The next meeting will probably be scheduled for 2 hours to review the document. Jay requested that any comments on Priority Projects or the Energy Section be provided to NMCOC by the end of October.

7. Open discussion

Steven Joncas asked Theresa if the Crosspoint Towers are for sale. Theresa informed the Committee that they are and that they have been able to get their occupancy up to about 60%.

Theresa informed the Committee that the City of Lowell is getting ready to move forward with their first Housing Development Incentive Program (HDIP) project. This is a program in which the state sets aside housing incentive money for tax credits that are used for market rate housing in Gateway Cities. The building on the corner of Merrimack and Central (a.k.a. the Dunkin Donuts building), is proposed to be redeveloped with market rate housing in the upper floors. The City is working with the developer to get the plans approved for the tax credits.

Stacie asked if the condemned Market Street building is for sale. Theresa responded that it is, however, the owner wants a high price for the building so it has not sold. There was then some discussion about the merits of the building and its potential sale price.

Steven Joncas inquired about 147 Central Street. Theresa responded that the building was sold and the owner is looking at a mixed-use development with housing on upper floors. The first two stories will likely have some community focus. The owner hasn't fully resolved his plans yet and the City is talking with him about the HDIP program as well.

Stacie asked if anything new was happening with the Saab Building. In response, Theresa stated she had not heard much recently.

Steven Joncas made a comment about the current status of the Union National Bank Building. Theresa noted that currently the building is vacant. The building is so large, it would need to be broken down and used as an indoor mall or something like the Sears Building in Porter Square,

Cambridge. Theresa had spoken to a retail broker who indicated that there is no demand in the current market for such a large building.

Stacie asked is there any plans to connect the bike path to the river walk. Beverly Woods responded that the City and NMCOG have looked at alternative routes, including creating trail along River Meadow Brook. The City does have a vision to possibly de-elevate some parts of the Connector after Plain Street and make it a parkway. Beverly noted that if that were to occur there might be an opportunity for a bike path.

8. Adjournment

The meeting adjourned at 1pm.



Northern Middlesex Council of Governments

Greater Lowell CEDS Committee Meeting

Comprehensive Economic Development Strategy (CEDS)
for the Greater Lowell region

A Multi-Disciplinary
Regional Planning
Agency Serving:

January 14, 2014
12:00-1:30 P.M.
NMCOG Conference Room
40 Church Street, Suite 200, Lowell, MA

Billerica
Chelmsford
Dracut
Dunstable
Lowell
Pepperell
Tewksbury
Tyngsborough
Westford

AGENDA

1. **Welcome**—Beverly Woods, Executive Director
2. **Greater Lowell CEDS program** – Jay Donovan
 - Annual CEDS Update for 2010-2013
 - Needs Analysis Update
 - Energy section
 - Updated CEDS Priority Projects
 - Refer to NMCOG Council for Approval
 - Economic Development District application
 - CEDS Planning Grant application (Five Year CEDS)
 - Siting of Renewable Energy Facilities Grant
3. **Other Economic Development Initiatives** – Jay Donovan
 - District Local Technical Assistance (DLTA) VII projects
 - Billerica and Dracut Economic Development Strategies
 - Vinal Square Strategic Action Plan
 - Lowell Commercial Rezoning and Tanner Street DIF
 - Pepperell Green Community Initiative
 - Tewksbury EDSAT & ED Strategies
 - Westford Agricultural Initiative and ED Project
4. **Next Meeting**
5. **Adjournment**

Matthew J. Hanson
Chair

Beverly A. Woods
Executive Director

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CEDS Committee Meeting

NMCOG Conference Room

40 Church Street, Suite 200

Lowell, MA 01852

Meeting Minutes

January 14, 2014

CEDS Committee Members: Gail Brown (Greater Lowell Workforce Investment Board), Arthur Ford (Sullivan Bille), Steven Joncas (Lowell Plan), Theresa Park (City of Lowell), Steve Sadwick (Town of Tewksbury), Bill Lipchitz (Community Teamwork) and Chris Kluchman (Town of Westford)

NMCOG Staff: Jay Donovan, Beverly Woods, Danielle Mucciarone and Suzannah Bigolin

1. Welcome and Introductions

Beverly Woods, Executive Director, NMCOG, welcomed the CEDS Committee members to the meeting, thanked them for their time and then asked each member to introduce themselves. She indicated that NMCOG is in the process of wrapping up the CEDS Update and submitting it to the EDA. Ms Woods stated that NMCOG would like to have the Committee approve what has been developed so that the NMCOG Council can review the CEDS Update tomorrow evening at the monthly meeting.

2. Greater Lowell CEDS Program -Jay Donovan

▪ Annual CEDS Update

Mr. Donovan explained the EDA requirements for the CEDS update process. The five- year CEDS must be prepared and the updates track the progress of implementation and present new information. Mr Donovan also indicated that following completion of the CEDS Update, NMCOG staff will apply for planning funds to prepare the next five-year CEDS and submit the Economic Development District (EDD) Application. Once the district gets approved for the Greater Lowell region, it will be easier to secure funds for a longer period of time, as the EDD process provides non-competitive funding on a three-year basis.

Needs Analysis

Mr Donovan presented the draft CEDS Update for the Committee's review. He explained that the primary purpose of the CEDS Update is to present new data. Each section of the report was then discussed in detail.

Mr. Donovan described the Regional Economy Section of the CEDS Update. He advised the meeting that this section updates the statistical data, noting that since the 2009 CEDS was completed, a decennial census has taken place. This has resulted in updated population, demographic and economic data. Mr. Donovan informed the meeting that the CEDS Update also

includes new census population estimates and projections. Mr. Donovan explained that the regional employment section provides employment levels and labor force data from 2011 to June 2013. This information includes local, regional and state employment levels. He indicated that MassDOT also prepared regional employment projections, which have been utilized on page 18. NMCOG has analyzed how the actual and projected employment numbers have differed, noting that the projections are inaccurate in a number of instances.

The CEDS Update tracks unemployment rates across the state, nation and region. Mr. Donovan noted that the state unemployment rate is now higher than the national unemployment rate. He informed the Committee that unemployment and per capita income is an area of particular interest for the CEDS Update as it is used as a basis for EDA funding. In particular, Mr. Donovan informed the Committee that funding is based on being 2 % above the national unemployment rate for a period of 24 months, and/or having per capita income levels at 80% of the AMI per capita income figure. Mr. Donovan noted that the per capita income figure is the best indicator as it is constant until the next decennial census, whereas unemployment rates change and fluctuate monthly. In Lowell, the majority of Census tracts are eligible for EDA funding based on per capita income levels.

A summary of plant layoffs per community based on the Rapid Response Team's data is also included in the regional employment section. Mr. Donovan explained that layoffs in one community have an effect on other communities, e.g. the Jabil Circuit layoffs had regional impacts.

Theresa Park asked about unemployment levels and jobs growth. She noted that the City of Lowell discovered that the number of jobs in Lowell has increased, but unemployment in the City has not decreased as a result.

Bill Lipchitz noted that the table of layoffs does not show that the Conference Centre had hired more staff after the Double Tree closed down and laid off jobs. Chris Kluchman asked for clarification on why the plant layoff data went as far back as 2009. Mr. Donovan explained that the data was provided for the timeframe when the 2009 CEDS was completed until June 2013.

Mr. Donovan then described the business creation section of the CEDS Update. He noted that growth in new establishments occurred mostly in Lowell, while employment levels had increased in all communities. A reduction in the average weekly wage of Greater Lowell region residents between 2011 and the second quarter of 2013 was also noted.

Mr Donovan informed that Committee that the CEDS Update includes an industry composition analysis focused on the service industry and the goods producing industry. The draft document looks at the number of establishments, monthly employment and average weekly wages between 2011 and June 2013 for several industrial sectors. NMCOG used data for the Greater Lowell Region Workforce Investment Area (WIA) and added in Pepperell separately, as it is not included in the WIA.

Mr. Donovan discussed the region's major employers, which are outlined on page 28. He explained that the Lowell Sun used to provide this list, but now only data from the Executive Office of Labor and Workforce Development (EOLWD) is available. This new data relies on a different methodology, which has made comparisons between 2009 and 2013 difficult. There was discussion on the differences between the two sources. In particular, Mr. Donovan noted

that UMass Lowell is not included on the EOLWD list, while Middlesex Community College is. It was also apparent that a number of employers with numerous establishments were not included on the list. Mr Donovan stated that there needs to be a more accurate way to gain an understanding of major regional employers. Ms. Park responded that the City of Lowell has a major employer list on its website and updates this list annually.

Ms Woods asked how many people are employed at Red Hat. Ms. Kluchman responded about 300, noting that the company met their targets for the TIF. Arthur Ford suggested that NMCOG should look at WR-1 Forms, which every employer files in Massachusetts. This form includes a list of employees, which could provide the detail needed for the CEDS. Mr. Ford indicated that this information is very accurate, but that he was not sure if it was publicly available. Mr Donovan asked Gail Brown if she was aware of any other information sources. She responded that it is a known problem and that she has brought this up before with Infogroup, the state's data source, and unfortunately she does not know of a better source.

Ms. Kluchman asked about the number of establishments described in Table 9 for Westford. She indicated that as the Cornerstone Mall opened in 2011 and has 30 new shops, it is hard to see how Westford only gained one establishment between 2011 and 2013. Mr Donovan responded that it may not be included in the data, and that the table represents the overall net figures, i.e. the sum change of businesses that closed and opened within the timeframe.

Ms. Brown asked whether Table 9 included home-based businesses, as she was not aware of 63 businesses in Dunstable. Ms. Woods responded that the Table would include agricultural businesses, which may be the reason for the high figure. Mr. Donovan further noted that the data may not include home-based businesses, as there is often no need for a permit or to register for some of these establishments. Following a query from Ms. Brown, Mr. Donovan confirmed that the table includes schools and municipalities as employers. Mr. Ford sort clarification on what constitutes a part-time job and whether or not this is included in the employment level data. In response, Mr Donovan stated that you have to work 20 hours or more to be considered full-time.

Mr Donovan explained that the final component of the regional economy section includes local tax rates. Ms. Park noted that the FY2013 commercial rate listed for Lowell is incorrect. She advised the rate is \$31.32 for industrial, commercial, and personal property.

As part of the needs analysis, the CEDS Update also includes housing market indicators. Mr. Donovan noted that data from the Warren Group has been utilized for most of this section. Mr. Donovan noted that foreclosure rates have started to decrease, which is good for the economy. He also described some of the changes in house and condominiums sales.

Mr. Donovan stated that the needs analysis update is of primary concern to the EDA and meets all of their requirements. NMCOG will upload the regional needs analysis section to its website, which is usually well-accessed by the community and organizations.

Energy section

Mr. Donovan reiterated that the clean energy is a focus for the EDA, and that this ties in with the Siting of Renewable Energy Grant. He indicated that this section has been completed by Danielle Mucciarone and was previously circulated to the Committee.

Ms Kluchman asked about Westford's Solar Energy Park being included in the table of Solar Energy Installations by Community. The Solar Energy Park is a 15-acre installation, which was constructed in 2010 and online by 2012. Ms Mucciarone is to double-check this information and adjust the table accordingly.

Steve Sadwick indicated that Figure 6 needs to be updated with the new Green Communities designations. Ms. Kluchman agreed, as Westford was awarded Green Community designation in December 2013. Jay responded that as the timeframe for the CEDS Update is July 2010- June 2013 that the table could indicate that Westford has commenced the process of applying for designation. Ms. Mucciarone is to adjust the table accordingly.

Updated CEDS Priority Projects

Mr. Donovan described the CEDS Update Priority Projects section, indicating that the projects reflect what the Committee approved at its last meeting. Mr. Sadwick clarified that the Manley Brook Restoration did not go forward. In response, Mr. Donovan stated that this project will be moved to the dropped projects list.

Mr. Donovan explained that the Major Regional Projects section still needs to be finalized. Some project descriptions need to be plugged into this section, including corridor studies and a summary of MassWorks projects. Mr. Donovan explained that the region did not receive MassWorks funding this year. Instead, \$12 million went to Worcester. The section will include summaries of the town center projects, as well as the UMass Lowell Projects, and has been put together by Suzannah Bigolin.

Finally, Mr. Donovan described how there are some minor elements of the narrative to be completed. The document is likely to be 150-200 pages with all attachments. Given the extent of work completed for the CEDS Update, Mr Donovan apologized for not being able to get the entire document circulated ahead of time.

Ms. Brown asked about adding further detail to the Clean Energy section, e.g. the state energy sector grant where training for clean energy was undertaken by the Greater Lowell Workforce Investment Board (GLWIB). Sixty-three incumbent workers were trained as part of this grant. Ms Brown indicated that she will send Mr. Donovan and Ms. Mucciarone additional information within the next one-two weeks.

Mr. Lipchitz asked if a vote to approve the document was required. Mr. Donovan explained the process and indicated that the CEDS Update needs to be approved. Mr. Ford stated that he strongly supports the CEDS Update and thinks that there is a lot of useful information within the document. He suggested that NMCOG speak to the Lowell Sun once it is finalized. Mr. Joncas concurred with Mr. Ford's support for the CEDS Update and recognized that considerable work has been undertaken by NMCOG. Mr. Ford made a motion to recommend that the NMCOG

Council approve the 2010-2013 CEDS Update for submittal to EDA. The motion was seconded by Mr. Lipchitz and voted unanimously by the Committee.

Economic Development District (EDD) designation

Mr. Donovan explained that following approval of the CEDS Update, Ms. Bigolin will be finalizing the EDD Application for submittal to EDA. The application will be submitted within the next two months.

CEDS Planning Grant Application

Mr. Donovan advised the Committee that NMCOG will be preparing the new CEDS Planning Grant Application shortly.

Siting of Renewable Energy Facilities Grant

Mr. Donovan informed the Committee that Siting of Renewable Energy Facilities project is progressing well. He indicated that NMCOG has held two training sessions, which included a Hydropower session in Pepperrell and a Renewable Energy in Historic Buildings workshop in Lowell. Ms. Brown was recognized for her participation in both sessions.

3. Other Economic Development Initiatives -Jay Donovan

District Local Technical Assistance (DLTA) Projects

Mr. Donovan reviewed the new DLTA projects with the Committee. The selection of projects has just been finalized. A summary sheet of project descriptions was distributed to the Committee members in their meeting materials. Mr Donovan advised that letters of agreement are in place for five of the eight communities.

Billerica and Dracut Economic Development Strategies

Mr. Donovan explained that NMCOG is working on Economic Development Strategies for Billerica and Dracut. The projects were commenced last year and will be completed in 2014.

Vinal Square Strategic Action Plan

Mr Donovan indicated that NMCOG is also finalizing work on the Strategic Action Plan for Vinal Square. Portions of the draft report have been delivered to the town.

Lowell Commercial Rezoning and Tanner Street

Mr Donovan announced that NMCOG will be working with Ms. Park and Craig Thomas at Lowell Department of Planning and Development on the Lowell Commercial Rezoning and Tanner Street projects.

Pepperell Green Community

The Town of Pepperell is interested in Green Community designation, and NMCOG will be assisting them with the application process.

Tewksbury

Mr. Donovan described how Tewksbury has decided that they want to setup a contract with Northeastern University for the preparation of an Economic Development Self-Assessment Tool. NMCOG will provide DLTA resources for this project.

Westford Agricultural Initiative

Mr. Donovan explained that there are a number of projects underway in Westford. NMCOG will be working on an agricultural initiative, which focuses on quantifying the economic development benefits of agriculture. There is also a TIF agreement being developed that Mr. Donovan believes will go to the Economic Assistance Coordinating Council sometime in March 2014.

Discussion:

Mr Joncas initiated a discussion on the Lowell Commercial Rezoning project. Ms. Park described the project in some detail, indicating its emphasis was on smaller-scale manufacturing and spurring additional micro-enterprise scale businesses and jobs growth. She provided an example of a nano-brewery that wanted to open up in the downtown Mixed Use zone, but needed a special permit, which was too difficult to obtain. Given the scale of the operation, it was thought that such a use should be allowed ‘as of right’.

4. Next Meeting

Mr. Donovan indicated that the date for the next CEDS Committee meeting is to be determined.

Other business

Ms. Park advised that the City of Lowell has received notification from the Rapid Response Team that JPMorgan at the Warren Fox Building will lose 60 jobs. The layoffs are expected to occur between now and end of year. Ms. Park advised that they are mostly IT-related and back office jobs. Ms. Brown advised that training is in place to re-skill these workers and assist them to transition to a new job.

Mr Joncas asked about occupancy of the Warren Fox Building. Ms. Park responded that is at about 60%, but a large employer is expected to be moving into the building.

5. Adjournment

The meeting adjourned at 12:55 p.m.

APPENDIX III – 2010-2013 CEDS UPDATE APPROVAL**Northern Middlesex Council of Governments****40 Church Street, Suite 200****Lowell, MA 01852****Minutes of Meeting: January 15, 2014**

The January 15, 2014 meeting was held at the NMCOG Office, 40 Church Street, Lowell, MA. The meeting was called to order at 7:02 p.m. with Chairman Matt Hanson presiding. The following were in attendance, as indicated in Attachment #1:

Councilors

- Andrew Deslaurier, Billerica Board of Selectmen
- Marti Mahoney, Billerica Planning Board
- Matt Hanson, Chelmsford Board of Selectmen
- George Zaharoolis, Chelmsford Planning Board
- Cathy Richardson, Dracut Board of Selectmen
- Philippe Thibault, Dracut Alternate
- Walter Alterisio, Dunstable Board of Selectmen
- Stephen Themelis, Pepperell Board of Selectmen
- Rich McHugh, Pepperell Planning Board
- David Gay, Tewksbury Board of Selectmen
- David Plunkett, Tewksbury Planning Board
- Rick Reault, Tyngsborough Board of Selectmen
- Steven O'Neill, Tyngsborough Planning Board
- Darrin Wizst, Westford Planning Board

Staff

- Beverly Woods, Executive Director
- Jay Donovan, Assistant Director
- Linda Bendzewicz, Financial Officer
- Carmen Bellerose, Financial Officer

Other

- Arthur Jemison, Department of Housing and Community Development
- Victor Negrete, Massachusetts Permit Regulatory Office
- Tony Wheeler, AECOM

I. Presentation: The State's 2014 Housing and Economic Development Priorities

Beverly Woods introduced Arthur Jemison, Deputy Director for Housing and Community Development (DHCD), and Victor Negrete, Regional Planning Manager at the Massachusetts Permit Regulatory Office (MPRO). Mr. Jemison outlined the State's request that DLTA funding be used for housing and economic development initiatives. He outlined Governor Patrick's initiative to produce 10,000 multi-family housing units across the Commonwealth each year, which is key to attracting economic investment and maintaining some level of population growth and a sustainable workforce. The last time that the Commonwealth produced 10,000 multi-family housing units was in 2004. Last year 6,700 units were produced. He noted that there are still PDF funds available for projects that promote housing development.

Mr. Jemison then provided an overview of the state's "Planning for Growth" program and outlined how the MassWorks grant program can be utilized to move such initiatives forward. He added that the State would like to partner with the municipalities to help them grow in the appropriate growth areas that each community has identified through the Regional Strategic Plan.

Victor Negrete described the regional planning initiatives that have been undertaken across the state. He then explained the redevelopment efforts that were undertaken in Marlborough at the former Hewlett Packard and Fidelity Investment site. The effort included zoning changes for mixed-use development, infrastructure investments, and the protection of natural resources. The City also negotiated a TIF with the developer and the project was awarded MassWorks funding.

Steve Themelis asked if the funding programs described are available to publicly initiated projects as well as private development projects. Victor Negrete responded that the programs are available to both public and private projects.

Steve O'Neill asked how large a project needs to be to leverage these funds. Arthur Jemison responded at least 15 units would be needed, noting that each community is different.

Andrew Deslaurier asked if the programs can be utilized for senior housing. Arthur Jemison stated that the State is very supportive of senior housing, particularly for affordable units.

Marti Mahoney stated that Billerica has attempted to rezone the town center for mixed use development, but the effort was not supported by Town Meeting. She asked if DHCD is able to provide assistance in this regard. Mr. Jemison responded affirmatively and agreed to forward contact information for the appropriate DHCD staff so that it can be distributed to the Council. He added that DHCD is willing to come out to a community to provide information on this issue.

George Zaharoolis provided an overview of recent town/village rezoning efforts in the Town of Chelmsford. He added that the overlay bylaw was approved by Town Meeting by a wide margin. The Town is now looking at Village Center zoning for Vinal Square.

Matt Hanson thanked Mr. Jemison and Mr. Negrete for addressing the Council. Mr. Jemison added that he is willing to come back to a Council meeting in the future should there be interest.

II. Presentation: Draft RECC Implementation Plan

Chairman Matt Hanson introduced Tony Wheeler of AECOM. Mr. Wheeler provided a brief overview of the project history and the summarized the scope of work for the implementation plan. He then outlined the existing conditions with the various municipal PSAPs. He noted that 911 cell phone calls for this area were being answered by the State Police, however those calls have been moved over the Essex County Regional Emergency Communications Center (ECRECC) which recently opened for business. Answering those calls means a heavier workload for the ECRECC, but it also means additional revenues from the State. Beverly Woods added that the State 911 Department has indicated that 40% of the 911 calls handled by the Essex County RECC are duplicate calls for a particular incident, which are not now forwarded to the communities. She added that the trend is for the volumes of 911 calls increasing at a higher rate when compared to calls made by land line, as people eliminate their residential land lines in favor of cell phone technology. Under the current funding scenario, that will mean less state assistance for local communities under the current operating model. Beverly Woods added that Frank Pozniak, Director of the State 911 Department, will be attending a meeting with the municipal managers and administrators on Thursday to discuss this issue.

Tony Wheeler outlined the current staffing levels within each existing PSAP. Currently, there are a total of 68 full time and 18 part-time personnel for the seven communities participating in the project. He then reviewed the budgets for each PSAP, noting that the budget figure provided by Dracut does not seem reasonable based on current staffing levels. Beverly Woods noted that staff has been trying to get better budget information from the Town.

Mr. Wheeler then reviewed the consolidation options that were analyzed:

- No consolidation- Maintains the status quo, with no improvements in interoperability and no efficiencies realized. Presently, \$3.8 million is being spent to operate the current PSAPs and projections show that costs will rise significantly in the future as salaries increase and technology and equipment is replaced and upgraded.
- Option 2: Includes consolidation of Lowell, Chelmsford and Tewksbury and under this scenario the communities will collectively save \$308,000.

- Option 3: Includes the communities of Dunstable (dispatched by Groton), Pepperell and Tyngsborough, and is more costly than operating separately. Jay Donovan explained the relationship between population and the structure of the state's funding assistance formula, noting that these communities do not trip the population threshold (approximately 45-50,000 residents) needed to achieve savings.
- Option 4: Includes the communities of Chelmsford, Dracut, Lowell and Tewksbury and does not achieve overall cost savings.
- Option 5: Under full consolidation all communities except Dracut achieve cost savings. Mr. Wheeler noted that if accurate budget numbers were available for Dracut the analysis would probably show that they would also see some savings.

Steve O'Neill asked if the cost of purchasing hand-held radios is included in this calculation. Tony Wheeler responded that he is not sure. Steve O'Neill asked that this be clarified.

Tony outlined the nine sites that were evaluated as possible locations for the RECC. He then outlined the criteria used in assessing the sites. Two potential sites have emerged: UMass Lowell West Campus in Chelmsford and a Tewksbury State Hospital parcel. Because both sites are owned by the State, site control would need to be established through the DCAM process or through special legislation. The communities participating will need to decide which site is most appropriate, following a due diligence process and more a detailed construction cost estimating process that considers site conditions.

David Plunkett asked about the staffing levels for a consolidated facility. Tony responded that under full consolidated there would be nine fewer positions than exist today. Given the time that will be needed to design and construct an RECC, it is expected that many employees will retire or move on to another job. His advice to the communities would be to not to fill vacancies during the design and construction process, so that there is no need to reduce the workforce when it is time to transition to the RECC. Beverly Woods added that the history of other consolidation projects has shown that dispatchers do not lose their jobs as a result of consolidating, and, in some cases, additional dispatchers have had to be recruited. David Plunkett asked if there is a set policy to hire from within the district. Tony replied that within the report there is a recommendation to transition employees in a fashion that gives preference to current employees.

Tony explained that it is important to hire the RECC Director early on as he or she will be the subject matter expert and will be needed to assist with the design of the facility, and with creating the policies and procedures under which the RECC will operate. Beverly Woods noted that the State would fund the Executive Director's salary for at least one year. Steve O'Neill asked if the Executive Director will be guided by a Board of Directors and if there will be weighted voting. Beverly responded that there will be a Board of Directors and the voting

procedures will be addressed in negotiating the governance agreement, but that her recommendation is that every community be given an equal voice.

Tony then outlined the proposed implementation schedule for the project, and described the concept of establishing a regional lock-up facility through the Middlesex County Sheriff's office. He noted that the Sheriff is planning to construct a forty-bed regional lock-up facility that would serve the communities in this area.

The Council thanked Tony Wheeler for his work on the project.

III. Minutes of Meeting: December 18, 2013

The minutes were distributed to all Councilors for review. Based on a motion made by Steve Themelis and seconded by Andrew Deslaurier, the Council voted to approve the minutes of December 19, 2012. Rick Reault, George Zaharoolis, and Darrin Wizst abstained as they were not present at the December meeting.

IV. Executive Director's Report

The Executive Director's Report was previously mailed and distributed to the Councilors for review. Upon a motion made by George Zaharoolis and seconded by Steve Themelis the Council voted unanimously to accept the Executive Director's Report. The report is included as Attachment #2.

V. Financial Report and Warrant

Carmen Bellerose presented the Financial Report and the Warrant for review and signature. Based on a motion made by Steve Themelis and seconded by George Zaharoolis, the Financial Report and Warrant were unanimously approved. The Financial Report is included as Attachment #3.

VI. Old Business

A. Draft Greater Lowell Comprehensive Economic Development Strategy (CEDS) Update for 2010-2013

Jay Donovan provided an overview of the importance of the annual CEDS update in maintaining the region's eligibility for EDA funding. He then reviewed the section on the regional economy, including economic data, demographics and pockets of distress. He noted that certain neighborhoods within Lowell are eligible for EDA funding based on per capita income. Jay then

discussed unemployment data and layoffs across the region, and the major employers and economic sectors found within the region. He then reviewed the housing and foreclosure data, noting that this is the first CEDS document to be completed since the housing crisis and recession began.

Jay reviewed the Energy section of the document, which as prepared at the request of EDA. Darrin Wizst noted that Westford's Green Community designation is not noted in the document. Jay responded that Westford was awarded designation in December, however, the time period covered in the CEDS ended on June 30th. A note will be added stating that Westford was in the process of applying when the document was completed.

Jay provided an overview of the Priority Projects, which are outlined by timeframe (short-term, intermediate, and long-term). Rick Reault stated that the \$65 million Greater Lowell Technical High School project and the Tyngsborough Senior Center are not listed. Jay responded that the projects can be added. Jay noted reviewed the list of projects that have been completed and that are underway.

Jay informed the Council that the CEDS Committee has met and voted to recommend that the Council approve the document for submittal to EDA. Based on a motion by George Zaharoolis and a second by Marti Mahoney, the Council unanimously voted to approve the document for submittal to EDA with the addition of the Greater Lowell Vocational School and the Tyngsborough Senior Center, along with a note on Westford's Green Community designation.

B. Update on the DLTA VII RFP Process

Jay Donovan stated that the communities have submitted proposals for \$172,120 worth of project requests from eight of the nine communities. He then reviewed the list of projects, which focus on Planning for Growth, Planning for Housing and Regional Partnerships (see attachment #4). He noted that about \$20,500 in funding remains within the budget, which will be allocated based on a second RFP to be issued in March.

C. Other Old Business

Beverly Woods provided an update on the procurement for website design services, noting that she received clarifying information from Virtual Towns and Schools indicating that the annual fees associated with their proposal total nearly \$4,000, which is considerably more than Pixellente. For this reason she recommended that the Council contract with Pixellente. Based on a motion made by David and seconded by George Zaharoolis, the Council voted unanimously to contract with Pixellente for website design services.

NEW BUSINESS

A. Community Reports

There were none.

B. Project Referrals

There were no projects currently under MEPA review.

E. Other New Business

There was none.

VII. ANNOUNCEMENTS

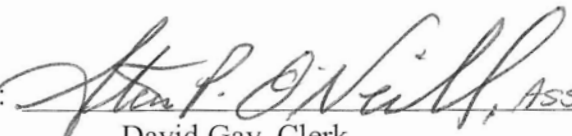
Beverly Woods announced that there will be a retirement reception for Linda Bendzicz on January 30th, at 6:00 p.m. at the Nesmith House on Andover Street in Lowell.

VIII. ADJOURNMENT

Following a motion made by David Plunkett and seconded by Marti Mahoney, the Council voted unanimously to adjourn the meeting at 8:50 p.m.

CLERK'S CERTIFICATE

I certify that this is a true copy of the minutes of the meeting of January 15, 2014.

Attest:  Assistant Clerk
David Gay, Clerk

APPENDIX IV - CEDS PRIORITY PROJECTS RFP PACKAGE

MEMORANDUM

To: Chief Administrators

From: Jay J. Donovan, Assistant Director

Subject: CEDS Priority Projects for Greater Lowell

Date: February 24, 2012

The Northern Middlesex Council of Governments (NMCOG), under contract with the Economic Development Administration (EDA) of the U.S. Department of Commerce, is preparing its *Annual Comprehensive Economic Development Strategy (CEDS) Update for 2010-2012*, which will be submitted to EDA for approval by July 1, 2012. This document will build upon the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013* and will maintain the region's eligibility for EDA funds. A copy of this document is on our web site at www.nmcog.org.

The Greater Lowell CEDS Committee, as part of its role in overseeing economic development activities in the region, voted at its January 24th meeting to update the CEDS Priority Project list for the region by requesting information from each member community on projects that meet the established priority project criteria. These priority projects can be funded through any source – federal, state, local, non-profit or private, but must meet the regional, community, job creation/workforce development or project readiness criteria developed as part of the 2009-2013 CEDS document. EDA-funded projects are required to be on our CEDS Priority Project list. Attached for your information are the Priority Project Criteria and the NMCOG CEDS Project Description form. The 2009-2013 CEDS Priority Projects for your community are also attached. Our staff will update the information for transportation projects that were identified as Priority Projects for your community.

In order to complete the *Annual Comprehensive Economic Development Strategy (CEDS) Update for 2010-2012*, we need your assistance in updating the priority projects within your community that were included on the 2009-2013 CEDS Priority Project list, as well as through your submission of new projects that meet the current project criteria. These projects will then be included on this year's CEDS Priority Project list. The project description form provides a convenient means to submit information on new projects, while a simple status report on your 2009-2013 CEDS Priority Projects will be sufficient.

Please submit the information directly to me by Friday, March 30, 2012 so that we may have a list of CEDS Priority Projects to approve at our next CEDS Committee meeting on April 10, 2012. This information will then be incorporated into the draft *Annual Comprehensive Economic Development Strategy (CEDS) Update for 2010-2012* being submitted to the Greater Lowell CEDS Committee and the Council for their approval in June. Do not hesitate to contact me at (978) 454-8021 ext. 16 or jdonovan@nmcog.org if you have any questions or require additional information.

cc: Greater Lowell CEDS Committee
NMCOG Councilors
Community Development Directors and Planners

Priority Project Criteria

January 24, 2012

The Priority Project Criteria have been developed as a result of the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013*. These Project Criteria address the CEDS requirements, as outlined by the Economic Development Administration (EDA). These Project Criteria are designed to assist the Greater Lowell CEDS Committee in prioritizing projects, which reflect a balanced approach to development in the NMCOG region. Upon the approval of the Greater Lowell CEDS Committee, these projects will be included in the *Annual Comprehensive Economic Development Strategy (CEDS) Update for 2010-2012* to be submitted to EDA by July 1, 2012. Projects listed within the CEDS will include EDA and non-EDA funded projects which assist the region in attaining the goals and objectives outlined in the CEDS document. Current Priority Projects for the region can be viewed on line in the *Greater Lowell Comprehensive Economic Development Strategy (CEDS) for 2009-2013* at www.nmcog.org.

All projects will meet the Priority Project Criteria and will be categorized based upon the expected timeframe to complete the specific project (Short-Term: 12-18 months, Intermediate: 2-4 years and Long-Term: 5+ years). Projects funded by EDA must be located in an area that has an unemployment rate of at least 1% higher than the national average for the preceding 24 months have a per capita income level equal to or less than 80% of the U.S. average or have experienced extensive layoffs during the past year. EDA-funded projects will be consistent with the specific program requirements and the 2012 EDA Investment Policy Guidelines.

For the purposes of the *Annual CEDS Update for 2010-2012*, the criteria for priority projects are outlined below. All projects will be required to be consistent with community objectives and have local support. The priority project criteria are as follows:

Short-Term (Up to 12-18 months)

Regional Criteria

- Project exhibits inter-municipal cooperation and coordination on development.
- Project addresses regional issues, such as affordable housing, trained workforce, small business assistance and financial tools for economic development.
- Project addresses problems with the current highway and/or mass transit system.
- Project provides improvements to the region's infrastructure that have a positive impact on the regional economy.
- Project supports quality of life issues related to open space, "greenfields", and recreational and cultural facilities.

Community Criteria

- Project is consistent with community goals and has evidence of support within the community (required).
- Project addresses the need for affordable housing.
- Project promotes local economic development projects or improves economic development capacity at the local level.

- Project reutilizes former industrial or commercial sites and converts them into positive, job-creating uses (example: brownfields).
- Project provides a positive environmental impact.
- Project addresses emergency need, such as the closure of military bases, layoff situations, the closure or consolidation of businesses or natural disasters.

Job Creation /Workforce Development Criteria

- Project supports job creation/retention that benefits the unemployed and underemployed.
- Project provides workforce development assistance, including skill training and supportive services, i.e. child care, transportation, English-as-a-second language, etc.
- Project broadens skills for incumbent workers and provides new skills or entrepreneurial training for laid off workers.
- Project targets assistance to those areas in the region most in need.
- Project creates jobs at living wage salaries.

Project Readiness Criteria

- Project is ready for construction or implementation within 12-18 months.
- Project proponents have site control for the project.
- Financing for the project has been identified and is in the process of being secured.

Intermediate (2-4 years)

Intermediate projects are those economic development projects that are expected to take 2-4 years to begin construction or implementation and that meet the previous criteria. Under this priority, site control and financing do not have to be under control.

Long-Term (5+ years)

Long-Term projects are those economic development projects that are expected to take 5 years to begin construction or implementation. These projects may be in the formation stages today and, due to limited resources or the amount of time until the project can be implemented, are not expected to begin for five years.

Please contact Jay Donovan, Assistant Director, at (978) 454-8021 x 16 or jdonovan@nmcog.org if you have any questions on the Priority Project criteria.

NMCOG CEDS Project Description

This one-page form has been designed to provide a straightforward means of collecting information on CEDS projects in the Greater Lowell region. Separate forms should be submitted on each project so that they may be included on this year’s CEDS Priority Project List. Applicants should review the NMCOG CEDS Project Criteria to determine whether the proposed project meets the criteria before submitting the form. Submission of this project form does not automatically qualify a project to be included on this year’s CEDS Priority Project List. Attach only one additional sheet if you need to provide additional information.

The CEDS Project Form(s) should be submitted to Jay Donovan **by 5:00 P.M. on Friday, March 30, 2012** in order to be considered for inclusion on the NMCOG CEDS Priority Project List for 2012. Completed forms can be dropped off or mailed to NMCOG at 40 Church Street, Suite 200, Lowell, MA 01852. If you wish to fax the CEDS Project Form(s), please fax the document(s) to (978) 454-8023. If you have any questions or require any additional information, contact Jay directly at (978) 454-8021 ext. 16 or jdonovan@nmcog.org.

Community or Organization Name: _____

Address: _____

Contact Person: _____

Phone: _____ Fax: _____ E-mail: _____

Name and description of project:

Expected start date for project? _____ Total Project Cost
 \$ _____

Funding sources and amounts: Federal _____ State:

Private: _____ Non-Profit: _____

Describe how this project addresses the respective project criteria.

Regional Criteria:

Community Criteria:

Job Creation/Workforce Development Criteria:

Project Readiness Criteria:

APPENDIX V – NEWSPAPER ARTICLES



Borrego Solar Systems finds room to expand in Lowell

By Jennifer Myers, jmyers@lowellsun.com

Updated: 02/02/2012 10:08:50 AM EST

LOWELL – In 2008, Borrego Solar Systems established its East Coast headquarters on Industrial Avenue East. Late last year, they realized growth of the business would necessitate a move.

The company explored options both in and out of the city. Early indications pointed to the company leaving Lowell to find a location that could accommodate its growth.

When staff in the city's Department of Planning and Development caught wind that Borrego might leave town, they helped to broker a deal between the solar company and the Princeton Corporate Centre on Westford Street.

The move will allow the company to meet this year's projected growth, expected to increase 15 to 25 percent from its current 37-employee base in Massachusetts.

"We are pleased that we were able to maintain our presence in the city of Lowell while expanding our office space to accommodate our growth and allow our employees to succeed," said Brendan Neagle, chief operations officer. "The city has been welcoming to us from the get-go and we feel fully supported by them at every turn."

Borrego, based in El Cajon, Calif., designs and installs solar electric power systems for commercial, residential and public sector clients. The company does not manufacture solar panels, but acquires them and assembles complete systems for clients.

"Borrego Solar is the type of company that will help shape the city's economic future," City Manager Bernie Lynch said. "We will continue to work with

them to support their endeavors and encourage their continued success."

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Report: Lowell region leads in job growth*The Lowell Sun Lowell Sun**Updated:*LowellSun.com

BOSTON -- The Greater Lowell labor-market region posted one of the highest regional job-growth rates in the state in the year ending in January, according to the Massachusetts Executive Office of Labor and Workforce Development.

The labor-market region that includes Lowell, Chelmsford and Billerica went from total employment of 113,400 in January 2011 to 116,300 in January 2012, according to the report. The 2,900 additional jobs represent a 2.6 percent gain -- the highest of any region except Cape Cod, which posted 4.6 percent gain (from 86,600 to 90,600).

The state as a whole demonstrated very slow job growth, according to the report, with total employment rising by just 6,300 (from 3.135 million to 3.142 million), a 0.2 percent gain.

Job gains were seen in 10 of the 12 labor-market regions, with Leominster-Fitchburg (down 100, 0.2 percent) and Springfield (down 3,300, 1.2 percent) experiencing declines.

In a separate report, the state found that Greater Lowell's January unemployment rate was 7.8 percent, down from 8.6 percent a year ago; Leominster-Fitchburg's unemployment rate was 10.1 percent, down from 11.2 percent.

Greater Lowell's labor force -- the sum of those reporting to be either employed or actively seeking employment -- increased by about 1,100, from 154,134 in January 2011 to 155,227 in January 2012.

The state's labor force actually contracted by about 10,000 people over the course of the year, going from 3.442 million to 3.432 million.

UML wins \$10M grant for new tech center

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

LOWELL -- The Massachusetts Life Sciences Center announced Monday the approval of a \$10 million capital grant to support construction of UMass Lowell's Emerging Technologies and Innovation Center.

The grant will fund research facilities at the new center, officials said in a press release. It will provide the university and private companies access to clean-room capabilities and a state-of-the-art lab focused on developing new medical applications and other capabilities tied to nano, bio-optics and other technology.

The 84,000-square-foot, \$70 million Emerging Technologies and Innovation Center (ETIC) is scheduled to open this fall.

For more on this story, please see Tuesday's Sun.

Report: Region's labor market lags that of state*Updated:*LowellSun.com

BOSTON -- Labor-market growth in Greater Lowell over the past year appeared to slightly lag that of the state as a whole, according to a pair of reports released Tuesday by the Massachusetts Executive Office of Labor and Workforce Development.

The state reported that the non-seasonally adjusted unemployment rate for the labor-market region that includes Lowell, Chelmsford and Billerica was 7.0 percent last month, down from the July 2011 figure of 7.9 percent but up from 6.7 percent in June.

Also, the size of the region's labor force declined by 654 people (0.4 percent) in the past year, from 155,800 in July 2011 to 155,046 last month.

The state's non-seasonally adjusted jobless rate last month was 6.6 percent, down from 7.5 percent a year ago. The size of its labor force was essentially flat last month when compared to a year ago, rising by 40 people among nearly 3.5 million people.

The labor force is the sum of all people who are either working or actively seeking work. Economists say a declining labor force is a sign of discouragement because it implies more people have given up seeking work.

In a second state report, Greater Lowell was found to have total employment of 117,700 last month, up 200 (0.2 percent) from the same month a year ago. Over the same period the state added 44,600 positions (up 1.4 percent) to reach total employment of 3,278,800.

The strongest year-over-year employment growth in the state occurred in Barnstable (up 2.9 percent), Boston-Cambridge (up 2.2 percent) and New Bedford (up 2.2 percent).

Two labor-market regions to report lower total employment: Pittsfield (down 2.6 percent) and Fitchburg-Leominster (down 0.6 percent).

'A validation': Lowell area designated cultural district

By Katie Lannan, klannan@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Other cities have bus stops, but here, signs announce "busk stops," where street musicians can perform for passersby.

Massachusetts Cultural Council Executive Director Anita Walker praised this standing invitation for an artist to attract an audience as one of the elements leading to an establishment of an official state Cultural District downtown.

A cultural district is a compact, walkable area of a community with a concentration of cultural facilities, activities and assets. The designation is officially awarded after rigorous review by the MCC, including site visits and planning discussions, Walker said.

Named Tuesday as one of the state's newest cultural districts, the Canalway Cultural District stretches from the Boott Cotton Mills Museum and Boardinghouse Park to the American Textile History Museum, roughly hemmed in by the Merrimack, Western and Lower Pawtucket canals and the Concord and Merrimack rivers.

"This community's striking architecture and unique history used with its rich cultural offerings make it an ideal place for citizens and visitors to explore," Walker said in a statement. "This designation will continue Lowell's extraordinary creative momentum for years to come."

The cultural-districts initiative, which grew out of a 2010 economic-development bill, bestows state recognition on economic and artistic centers that encourage business growth, enhance cultural development and drive tourism.

"A lot of this is confidence-boosting for a community," said MCC Communications Director Greg Liakos. "It's intangible and easy to dismiss, but it means a lot."

During its board meeting at Lowell National Historical Park, the cultural council unanimously approved the creation of the Canalway Cultural District along with three others in Natick Center, Concord Center and Shelburne Falls, a collaborative venture between the towns of Shelburne and Buckland.

The newest cultural districts join the previously existing six in Lynn, Rockport, Pittsfield, Gloucester, Hyannis and Boston's Fenway neighborhood.

Walker said there are more to come, with about 100 communities in various stages of the application process. The MCC recently completed site visits to proposed cultural districts in Sandwich and Essex.

The council hopes to create a network of districts that exchange ideas and can be marketed together as tourist destinations.

The designation of the Canalway as an official cultural district follows the release of a report by independent think-tank MassINC and national creative-economic group ArtPlace, recommending investment in the arts as a means of economic revitalization for the state's Gateway Cities.

Gateway Cities, such as Lowell and Fitchburg, are older industrial cities that anchor regional economies. The report found that residents of such cities who engage in cultural activities have more positive views of their community and feel their quality of life is higher.

The report shows that across the 11 Gateway Cities studied, 279 arts-and-entertainment establishments employed 4,601 people and paid more than \$25.5 million in wages during the second quarter of 2011, including \$3,823,902 to 439 workers in Lowell and \$768,344 to 176 workers in Fitchburg.

Additional data used in the report shows that Gateway City cultural organizations spend nearly \$115 million annually, with a direct economic impact of \$9.5 million in Lowell and \$2.8 million in Fitchburg.

State Sen. Eileen Donoghue, a Lowell Democrat and co-chair of the Joint Committee on Tourism, Arts and Cultural Development, said her city has worked hard for many years to reinvent itself into a thriving cultural hub.

"This type of designation is really important to a community," she said. "It goes beyond branding. It is a validation."

Follow Katie Lannan at twitter.com/katielannan.

Freudenberg redevelopment kicks off

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Former Lowell Mayor Eileen Donoghue admits she didn't know what the Hamilton Canal District was when some city officials had begun talking about revitalizing the neighborhood 14 years ago.

Few people had visited the southern tip of the downtown that looked nothing more than wasteland, said Donoghue, now a state senator.

State Rep. Tom Golden, D-Lowell, couldn't begin to imagine how abandoned textile mills and weed-covered lots could be put to productive use again. All he knew was, Golden said, was what then-City Manager Brian Martin told him: "We have to do this."

The \$800 million Hamilton Canal District redevelopment project couldn't have happened had it not been for Martin's and other city leaders' determination to make Lowell a better place to live, some community members say. State and congressional leaders also helped push the project forward.

The Appleton Mills that City Manager Bernie Lynch said looked "bombed out" just two years ago is now a sleek, 130-unit affordable-housing complex after Gov. Deval Patrick's Office provided a \$13 million grant to help developer Trinity Financial begin to deliver its vision.

Trinity has now begun renovating the former Freudenberg Nonwovens building into a 55,000-square-foot commercial center next to a bridge it built with a \$2 million federal grant.

"This kind of project reminds us of what is possible when every level of government comes together," Rep. Niki Tsongas said.

The project's success thus far also sends a message, said City Councilor Bill Martin.

"When you bring resources to Lowell, we will make the best of those resources," he said.

Trinity Financial and the city celebrated the groundbreaking of the Freudenberg renovation project Friday. The \$8.5 million construction is considered a key piece of the mixed-use Hamilton Canal District redevelopment, which is expected to eventually generate 400 permanent full-time jobs. The ribbon-cutting ceremony also marked the completion of the new bridge for both vehicular and pedestrian traffic.

Once complete, the new office building will be renamed 110 Canal St. Trinity held off the Freudenberg project earlier this year after its attempt to obtain a \$5.4 million grant from MassWorks -- a Boston-based nonprofit that works to create jobs for the disabled -- failed. Trinity was able to secure the grant for about \$500,000 less through the city at a second try in June, however.

Trinity has also obtained \$4.5 million in loans from TD Bank while investing \$2.5 million of its own money. Other funding sources include the Lowell Development and Financial Corp., which is providing a \$250,000 loan, and the Massachusetts Housing Investment Corp.

"This is just another step (in the project)," Trinity President Jim Keefe said of the Freudenberg project. "But this is an important one."

Trinity is renovating the building on spec to market each floor as a 10,000- to 11,000-square-foot unit to companies looking for office space. Trinity's project manager, Abby Goldenfarb, said during the ceremony that the company is taking the if-you-build-it-they-will-come approach because urban offices with easy access to downtown restaurants and recreational amenities such as LeLacheur Park appeal to workers.

"We believe there are companies that recognize the importance of locating in a quality place" to attract a workforce, Goldenfarb said.

The canal project is a part of the larger initiative to redevelop Jackson, Appleton and Middlesex streets, also known as JAM. The Hamilton Canal District is expected to provide up to 1.6 million square feet of mixed-use space, complete with a \$175 million state judicial center and Lowell Community Health Center as well as the trolley line to be extended for \$65 million.

Bill Martin called the canal project "the best happening anywhere around the state."

Gregory Bialecki, secretary of the state Executive Office of Housing and Economic Development, agreed.

"This is an extraordinary change for the city" when the nation is going through an economic stalemate, Bialecki said during the ceremony.

Donoghue, Lynch and Tom McColgan, vice president for commercial real estate at TD Bank, praised Trinity's experience and caliber. Willie Taylor, regional director for the U.S. Economic Development Administration, which provided the \$2 million grant for the bridge construction, congratulated the city and Golden lauded Brian Martin's initiative. Martin said after the ceremony that he was thrilled to see the "blueprint" for Lowell's future turning into a reality.

Keefe said Trinity has made a commitment to the city and wanted to develop the commercial complex on spec to carry out its promise.

"We really believe in the city," Keefe said. "It's up to us to play a leadership role."

Brooks Automation to lay off 150 workers

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- Brooks Automation Inc., a provider of factory-automation systems for the semiconductor industry, said it was cutting up to 150 jobs in an effort to reduce operating costs and improve profitability.

The layoffs, which affect the company's U.S. operations as well as its life-sciences facilities in Switzerland, are expected to be mostly complete by the end of this month. They comprise about 10 percent of the total workforce.

Brooks, which announced the layoffs in a regulatory filing, expects to incur charges of \$2.4 million to \$2.8 million related to the layoffs, and save \$11 million annually in operating costs. The filing noted that 66 of the positions were "contingent employees" and that 19 were associated with the Switzerland operations.

It wasn't immediately clear how many of the affected employees are in the Chelmsford headquarters at 15 Elizabeth Drive, as an email and phone message were not immediately returned.

Founded in 1978, Brooks also has operations in Texas, Colorado and California in the U.S., as well as in Mexico, Europe and the Far East, according to the company's website.

About 10 years ago, it merged with Billerica-based PRI Automation in one of the larger semiconductor-equipment deals of that time.

Analysts say Brooks is expected to earn 3 cents per share on revenues of \$115.9 million for the current quarter, which ends this month. The revenue figure would be \$15 million less than the same period a year ago.

Shares of Brooks were trading at \$8.33, down 16 cents, in Nasdaq trading about 12:30 p.m. Shares have lost 16.8 percent of their value so far this year.

Turning the Cornerstone on Westford retail and office project

By Sarah Favat, sfavat@lowellsun.com Lowell Sun

Updated:

LowellSun.com

WESTFORD -- Three miles of curbing, 38,000 square feet of concrete sidewalks, 13 acres of asphalt paving and a 1.5 million gallon underwater storm-drainage system is how Cornerstone Square's general contractor explains the large-scale and obstacles associated with the development.

"It's really been a fascinating project," said Jim Ward, of Danvers-based Republic Building Contractors Inc. in an interview at the site Tuesday morning with developer Robert Walker.

Around the site, contractors were busy carrying out the aggressive construction schedule that will see most of the site opening at the end of October. A crane operator was busy putting up a 100-foot flagpole that will hold a 50-foot wide and 30-foot tall American flag.

The project involves transforming 30 acres at the corner of Littleton and Boston roads into a 238,000-square-foot retail and office development.

"The scale, it's massive," said Ward. "When we first started looking at this place last August this was mostly virgin forest, with a few structures. It's a 30-acre site. We had to clear 30 acres."

The contractors put a shovel into the ground the day after Thanksgiving last year to start construction and approaching less than a year later, the majority of the development is scheduled to open at the end of October.

"It took us four years to get here through the process. Four years of bureaucracy and one year of getting things done," said Walker.

Eastern Bank facing Littleton Road is already open.

Market Basket is set to open Dec. 1. Marshalls and Home Goods are scheduled to open April 1. Petco is set to open in January and Evviva Cucina, an Italian restaurant, will open March 1, Walker said.

The medical-office building being constructed at the south side of Littleton Road will be ready to open in December, he said.

Walker first came up with the idea for the development in 2006, he said.

He won all necessary permits in June 2009 after appealing an earlier decision by the Planning Board, which had initially denied the project, but then approved a modified proposal.

Walker has met some resistance by some elected officials on town boards and some residents in town.

He contends 99 percent of the people in town and in surrounding towns are excited that the project is opening soon.

"There is a very small minority of people who stand in the way of progress, who stand in the way of what capitalism is all about and they continue to do that on a daily basis," he said. "That's what they do and our job is what we do. I can't let those people affect how we operate our business."

He said the results of the project have turned out better than he expected.

"It's been exciting. I tell people the best part of coming in every day is seeing the guys working," said Walker. "That's what gets me excited. It really does. Seeing guys that are just happy to have a job, happy to work, happy to produce their particular trade and their craft."

On any given day, there are about 300 people working on the site, said Ward. The workers come from Southern New Hampshire and Massachusetts.

The Associated General Contractors of America issued a report last month which showed a decline in the number of construction jobs in 31 states, including Massachusetts, over the last year.

"A lot of the subcontractors are thrilled to be working, they just weren't working elsewhere," said Ward.

Walker said the project has created well-over 300 jobs when services are factored in.

More than 700 people are expected to be employed in the development once it opens.

Ninety-five percent of the materials used on the building are American-made, said Ward, which was important to both the contractor and developer.

The concrete comes from Westford and the asphalt is from Chelmsford.

Director of Land Use Management Angus Jennings said the town has not studied the economic impact of the development, but the town will see a direct impact in tax revenue generated from the site and indirect benefits, like wages going into the pockets of the workers, which will then go back into the local economy.

He said the fact that lenders had enough faith the project would succeed is a sign of the economic health of the local economy.

"We hear a lot of talk these days at a national level of job creation and economic development," said Jennings. "This is a great example of how that plays out on the ground in a town like Westford."

Follow Sarah Favot on Twitter @sarahfavot.

Route 3 communities join to

Middlesex 3 geared toward aiding economy

By John Laidler
GLOBE CORRESPONDENT

A newly formed partnership among five area communities to promote and enhance their shared Route 3 corridor is about to make its formal debut.

With support from the state, Bedford, Billerica, Burlington, Chelmsford, and Lowell this past spring adopted the brand name Middlesex 3 for their shared region, and created a nonprofit to spearhead the collaboration.

The Middlesex 3 Coalition, intended as a public-private partnership, has since created a website and formed a 10-member board of directors that includes the chief executives of the five communities, three business people, and representatives from the University of Massachusetts Lowell and Middlesex Community College.

This Tuesday the coalition will hold an official kickoff meeting at the 600 Technology Park Drive office building in Billerica. Gregory Bialecki, the state's housing and economic development secretary, will be among the speakers at the event, which begins with registration and a breakfast at 8 a.m.

"It's intended to highlight what the Middlesex 3 Coalition is about and also to attract membership," said Billerica town manager John C. Curran.

"A lot of the businesses and real estate agents in the region have been invited to attend."

"I think there is a lot of potential in this region," Curran said. "The thing that we as communities have to recognize is that businesses don't necessarily say they want to locate in a community. They locate there because of the assets the

region provides."

Among those assets highlighted by the coalition on its website are its location within 15 miles of both downtown Boston and Nashua and a transportation network that includes access to four major highways, public transit, and Hanscom Field, a full-service, general aviation airport.

The website also touts the region's relatively low-cost real estate, its educated workforce,

'We love our parochial views in New England, that towns can stand on their own. But at times, we do need to stand together.'

JOHN PETRIN
Burlington town administrator

its diverse industry mix, its colleges, and such cultural and recreational amenities as the Tsongas Center and Lowell Memorial Auditorium.

"We love our parochial views in New England, that towns can stand on their own. But at times, we do need to stand together," said Burlington town administrator John Petrin.

"In this case, we are branding together to promote . . . the Middlesex 3 region. It's a great step forward."

Bedford town administrator Richard Reid said that the coalition also gives businesses an opportunity to talk with local governments about their needs and "for us to talk to the state about what is important to the region."

Reid, chairman of the coal-

ition board, said improving the business climate and enhancing the region as a place to live are interrelated goals.

"Our view is that businesses want to be here if the quality of life is good for their employees," he said.

Bialecki said the coalition represents a collaborative growth strategy that the state is encouraging.

"It's very difficult for any single community to develop an identity that is really useful for business marketing purposes," he said.

"Communities, we think, are much better off trying to brand themselves and make themselves economically competitive if they work together."

By collaborating as a region, Bialecki said, the Middlesex 3 communities can bolster their prospects for securing state grants.

And "working this way is going to make them more attractive to businesses. It's allowed them to put a better foot forward," he said.

Bialecki said the state decided a regional initiative made sense in the area because the five communities share common infrastructure, have a history of collaborating, and are all "business-friendly." And the widening of Route 3 and other highway improvements have prepared the region to absorb more growth, he said.

While there are existing regional collaborations, Bialecki said the model offered by Middlesex 3 — that of a relatively small number of communities with much in common — is one the state hopes to replicate.

Already, it has begun to do so with three communities located along Interstate 495: Boxborough, Littleton, and Westford.

Chelmsford town manager Paul Cohen said his town is excited to be part of Middlesex 3.

"We have a great quality of life and some strong employers

promote area to businesses

in this region and we just think we are poised to step up to an even greater level," he said.

Adam Baacke, Lowell's assistant city manager, said the initiative "recognizes that the economy of today does not really respect municipal boundaries. . . . This is a great illustration of how communities can get together and work toward common purposes that ultimately benefit all of them."

Robert Buckley, a senior partner in the Burlington office of the law firm Riemer & Braunstein, one of the business members on the board, said Middlesex 3 is being well-received in the business com-

munity.

"People like the idea that they can hear what is going on," he said.

"These people are making significant economic decisions, and they want to hear

what is going on in the region and have access to the decisionmakers in terms of what their thoughts are."

John Laidler can be reached at laidler@globe.com.

\$25M bond award represents last funding piece needed for Pulichino Tong building

By Katie Lannan, klannan@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BOSTON -- The state's \$607 million investment in the University of Massachusetts system will help bring a new, \$35 million business-school building to UMass Lowell, Gov. Deval Patrick announced Tuesday.

Patrick committed \$25 million in bond funding to the project at the Lowell campus, where university officials say the business school has outgrown its current facility.

"This is going to give potential students one more reason as to why they should choose public education and why they should choose UMass Lowell," said state Rep. Tom Golden, D-Lowell, a graduate of the university's business school and MBA program. "The governor is investing in the future not just of UMass, but the entire commonwealth."

The Pulichino Tong Business Building, named for UMass Lowell alumnus John Pulichino and his wife, Joy Tong, will house the Robert J. Manning School of Business, renamed in 2011 in honor of the chairman and CEO of MFS Investment Management, also a university alumnus.

A \$6 million donation from Manning and \$4 million from Pulichino and Tong will also go toward the construction, providing the rest of the necessary funds. Officials hope to begin construction next year.

The business building will be the third new UMass Lowell structure in five years.

University Chancellor Marty Meehan said that before this, no new building has been constructed in 33 years.

"I think the governor recognizes the fact that many of our campuses need an investment," Meehan said. "If we're going to grow research and create new companies and have a highly educated workforce, then we need new buildings."

The university's \$80 million Emerging Technologies and Innovation Center, which officially opens Oct. 11, received \$35 million in state funds.

The new building will be located next to the innovation center and engineering and science buildings so that business students can take advantage of these facilities, Meehan said.

Patrick's full 2013 capital plan is set to be unveiled next week.

Other projects announced on Tuesday include an \$85 million physical-science building at UMass Amherst and a \$100 million classroom building at UMass Boston.

Patrick also awarded \$2.5 million in performance incentive grants Tuesday to the state's public universities and colleges.

Of this funding, \$249,930 will go to UMass Lowell for the development of its co-op work program.

University spokeswoman Christine Gillette said the school has offered experiential learning opportunities for a few years, first in plastics engineering but later branching out to include positions at technology startups, accounting firms and other companies.

Follow Katie Lannan on Twitter @katielannan.

Middlesex 3 Coalition to forge partnerships for economic growth

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BILLERICA -- Dean LaMothe, director of finance at E Ink Corp., wants Billerica to become known for electronic-display technologies when the company moves its workforce to Technology Park Drive from Cambridge next year.

"We want Billerica to be the research-and-development capital of the world," LaMothe said.

LaMothe doesn't think it's a far-fetched goal, given the pool of skilled workers and major transportation infrastructure in the region. In addition to higher-education institutions like UMass Lowell, the town is also a short drive from the Logan and Manchester, N.H., airports.

These were also a major factor in Reading-based Keurig Inc.'s decision to build its new headquarters on South Avenue in Burlington, said John Heller, the company's vice president of logistics and real-estate services. The coffee-brewing technology company wanted to make sure the new site will draw qualified job candidates, he said.

Business and political leaders in communities along Route 3 hope more companies recognize what the area has to offer. To promote the region, they're working together through a new nonprofit organization, the Middlesex 3 Coalition.

"We do have the ability to compete globally," said state Executive Office of Housing and Economic Development Secretary Gregory Bialecki, looking over the roomful of community leaders gathering at the Middlesex 3 kickoff meeting at 600 Technology Park Drive Tuesday morning. The regionalization efforts should pan out, he said, because "there is room to grow and the willingness and appetite to grow."

With Bedford Town Manager Richard Reed serving as the master of the ceremony, Bialecki, Heller, LaMothe and John Weis, Boston University adjunct professor in development and land-use policy, debated how to foster economic development along the Route 3 corridor.

The Middlesex 3 Coalition, which represents Billerica, Bedford, Burlington, Chelmsford and Lowell, will also bring together educational and financial institutions, as well as real-estate professionals and nonprofit organizations to improve infrastructure, obtain grants, streamline permitting, identify available parcels and advocate for legislative efforts.

Bialecki said regionalization is key to economic development. While state funding for transportation infrastructure is crucial to promoting growth, economic expansion is also about "branding" the region, he said.

Jay Linnehan, executive vice president of Middlesex Community College, said all sorts of educational programs are available between the college and UMass Lowell.

Working with businesses is a tradition for these educational institutions, said Jacqueline Moloney, executive vice chancellor of UMass Lowell, who also spoke at the event.

"Our future is depending on how entrepreneurial we can be, partnering with the industries," Moloney said of the university.

"People don't necessarily work in the town they live in," Lowell City Manager Bernie Lynch said after the event. Lynch, a Chelmsford resident, said the more companies move into the region, the more business opportunities people in Lowell will have.

Lynch said being part of the coalition should help the city advocate for job-training programs, state investment in education and infrastructure changes among other community needs.

Angus Jennings, Westford's director of land-use management, said municipalities could also pool resources to assist businesses with their needs, such as transportation of their employees from around the region.

Chelmsford Town Manager Paul Cohen said the coalition will benefit communities throughout the region.

"The Middlesex 3 Coalition demonstrates the commitment by the towns, businesses, higher education, and nonprofit organizations to work together to address challenges, provide jobs, and improve our standard of living," Cohen said in an email.

Follow Hiroko Sato on Twitter [@satolowellsun.com](https://twitter.com/satolowellsun).

Lowell welcomes PlumChoice

Updated:

LowellSun.com

PlumChoice Inc. CEO Bob Badavas, second from right, welcomes city officials to his firm's new headquarters on the 11th floor of Tower 3 at Cross Point on Tuesday. At left are City Manager Bernie Lynch and Mayor Patrick Murphy. The company, which offers high-end, remote technical services, relocated 200 workers from Billerica to a 36,000-square-foot space at Cross Point. Founded in 2001, PlumChoice boasts a former Ernst & Young Entrepreneur of the Year and has raised \$65 million in venture funding. Sun/Jon Hill

LRTA garage to get \$2.5M upgrade

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Lowell's train- and bus-station garage will soon undergo a major makeover, thanks to \$2.5 million in federal funding.

Gov. Deval Patrick's Office and the state Department of Transportation announced this week that the Lowell Regional Transit Authority will receive \$2.5 million in federal transportation funding for the reconstruction of the Gallagher Terminal Parking Garage. A "state-of-the-art" garage will replace the 30-year-old existing facility, according to LRTA.

"We are very appreciative of the federal funding and send thanks to the congresswoman (Niki Tsongas) for all she is doing for transportation in the region and thanks to Governor Patrick and his team who really recognized the need the LRTA had at the Gallagher parking garage to do something and do it quickly," Jim Scanlan, executive director for LRTA, said in a press release. "This funding invests in a critical component of the LRTA and will push us into construction."

The funding is part of the White House's "We Can't Wait" initiative that allows states to repurpose federal transportation funding from 2003-06. Massachusetts has reallocated \$13.2 million to fund 10 regional transit authority projects, including the Gallagher garage project in Lowell.

"This initiative puts federal funds to work, jump-starting projects in the commonwealth that may otherwise have remained dormant during these difficult economic times," Tsongas, D-Mass., said in the press release. "With the Gallagher Terminal project ready to go, these funds can be put to use immediately... The potential for more modern and energy efficient facilities is a huge boost for the region and another step in the revitalization of downtown Lowell."

Follow Hiroko Sato on Twitter.com @SatoLowellSun.

Lowell judicial center awarded design grant

By Chris Camire. ccamire@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- The city's long-awaited judicial center saw a major breakthrough Tuesday, when the Patrick administration awarded the project \$1.2 million in funding.

The announcement was part of the administration's fiscal 2013 capital-spending plan, which shows which projects are being funded this year.

The money will go toward designing the judicial center. The design phase is expected to begin in January 2013 and take about a year, with construction on the \$175 million project starting in the spring of 2014.

State Sen. Eileen Donoghue and state Reps. Tom Golden, David Nangle and Kevin Murphy, all Lowell Democrats, said Gov. Deval Patrick's willingness to move forward with the center's design is a signal the entire project will be funded. They hailed the development as a major boost to the city's downtown revitalization.

"It's been a long time coming," said Donoghue, who is an attorney. "It was the next crucial step."

Originally scheduled to be completed by 2013, the judicial center has suffered a string of delays over the years due to the state's shaky economic climate. The center is now expected to open in 2016 or early 2017.

The new 245,000-square-foot facility will house five court departments, including superior, district, housing, juvenile, and probate and family courts. Those projects and others will be financed through the sale of bonds.

City officials have said the project is vital to the success of the 15-acre Hamilton Canal District. It is expected to create construction jobs for the region, as well as lure lawyers and other professionals downtown, benefiting area businesses.

Once under way, the center will be the largest construction project in the state.

"If you take the (Tsongas Center at UMass Lowell) and LeLacheur Park and combine them, this is still a bigger project," said Murphy, also an attorney. "It's going to create jobs. It's going to spur economic development. It's great for the city."

Negotiations to bring a new judicial center to Lowell crawled along for nearly a decade.

Once slated to be built on Davidson Street, near the Lowell Memorial Auditorium, the project was moved due to fears of flooding at that site by the Concord River.

In the summer of 2008, the deal was finalized when the state agreed to purchase from the city for

\$3.8 million a 4-acre Jackson Street property near the Lord Overpass.

In the meantime, Nangle said people who work at and use Lowell District Court on Hurd Street have to deal with poor building conditions due to a lack of financial investment in maintenance.

Golden said city officials will continue to focus on what to do with the Middlesex Superior Court, Lowell District Court and the Middlesex Juvenile Court, once their operations move to the judicial center.

The state's Division of Capital Asset Management has been working to facilitate the future of the buildings.

Follow Chris Camire on Twitter@camirereports.

UML opens \$80M academic building Thursday

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

LOWELL -- UMass Lowell will officially open its new \$80 million Emerging Technologies and Innovation Center at 11:30 a.m. Thursday.

The 84,000-square-foot structure, at the corner of University Avenue and the VFW Highway, is the first new academic building constructed on campus in more than three decades, UMass Lowell officials said. They say it will be home to cutting-edge research in nanotechnology, molecular biology, plastics engineering and optics that will advance fields such as life sciences, energy, national security, environmental protection and more.

The project was funded through \$35 million from the Massachusetts Economic Investment Act of 2006, \$5 million from the federal government, bonding through the UMass Building Authority, a \$10 million grant from the Massachusetts Life Sciences Center, and industry and individual donors, including UMass Lowell alumni.

Event speakers are scheduled to include UMass Lowell Chancellor Marty Meehan, U.S. Rep. Niki Tsongas, state Sen. Eileen Donoghue, state Rep. Thomas Golden, former state Sen. Steven Panagiotakos, UMass President Robert Caret, UMass Building Authority Executive Director Katherine Craven, UMass Lowell Provost Ahmed Abdelal, Vice Provost for Research Julie Chen and UMass Lowell faculty.

Chelmsford aims for center renewal

By Grant Welker, gwelker@lowellsun.com Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- The results are in from a survey about the town center: People want more shops and restaurants, but costs of renovating existing spaces are prohibitive, and the center is well-positioned to capture a "significant portion" of the nearly 700 new housing units the town is expected to see by 2020.

The findings, released ahead of a public meeting scheduled for tonight, also showed that the mix of retail uses is "less than ideal," and that most survey respondents said they wanted more shops, restaurants and entertainment there. Perception of the center is mostly neutral, and those who want to live there are generally older.

With that information, town officials and planning experts will be able to determine how much and what kind of housing the center could support, what types of businesses they may want to encourage, and what other improvements might be best to strive for.

"Up until the study, we didn't really have any third-party research to verify that the town's goals and objectives were reasonable and obtainable based on economic realities," said Evan Belansky, the town's community development director.

The town could take a range of actions to help shape the town center's future, Belansky said, such as offering tax incentives to new or expanding businesses or using Community Preservation Act funds for certain properties in the historic district. Those steps or many others would first need Town Meeting approval.

No specific sites are mentioned in the study's recommendations, but there are some that carry significant potential for the area, such as the former Stop & Shop and Marshalls plaza on Boston Road, which otherwise includes CVS, Friendly's and Bank of America. Stop & Shop, which owns the 8.45-acre site, has said it is considering its options for the property.

David Hedison, Chelmsford Housing Authority director, said he supports anything that brings more housing units to the town center. Though the authority doesn't currently have plans for adding units, it has talked with Stop & Shop about the possibility of turning the plaza into a housing development, he said.

Another key parcel, the Odd Fellows Hall on Boston Road, is vacant and targeted as a priority site for housing, according to the report.

Two shop workers across from Odd Fellows Hall, a large white building on the east side of Boston Road, said they'd like to see housing there. One of them, Paul Lund, the owner for more than 30 years of Easy Housekeeping Shops, said he would also welcome a greater mix of retail, as long as it doesn't include big-box stores like Home Depot or Ocean State Job Lot, which could drive him and others out of business.

Kim Preston, manager of Newton's Hair Salon next door, said what the center really needs is a grocery store to replace Stop & Shop, which left almost a year ago in favor of a new store on Chelmsford Street near the Lowell Line. That was also a common request among survey respondents.

"A lot of people who live on this side of town miss having the Stop & Shop there," Preston said, adding that even a small grocery store could satisfy demand.

Jessica Walsh, the owner of Creative Decor & Gift Shop just up the street from Newton's Hair Salon, doesn't favor new residences because parking is already scarce, and the area not pedestrian-friendly.

"It's just a tough town center because there's no parking to begin with," she said.

A lack of retail variety may be holding the center back, according to the report.

Commercial real-estate agents interviewed by FinePoint Associates, the firm that conducted the study, said there is demand for retail space. But existing space could be too costly to renovate, the study said, especially with regulations in a historic district, and changes needed to accommodate many new uses is "prohibitive and is deterring retail tenant attraction."

The results of the study will be discussed in a meeting Tuesday from 7-9 p.m. at the Police Department's training room at 2 Olde North Road. Attendees will be able to ask questions and offer ideas.

The 70-page study was conducted to follow up on the town's master plan and a housing affordability plan, and it will help guide the Center Village Master Plan Committee, which was formed this summer. FinePoint Associates gave a series of recommendations to the town, including interviewing the owners of what it calls target sites prioritizes for housing development to gauge their level of interest in development, and discussing policy decisions that may need to be made in areas, such as allowable density or parking requirements.

FinePoint Associates compared Chelmsford center to Winchester center and found that despite Winchester's smaller population, it had double the number of retailers, including more professional services, food stores, and clothing, shoes and accessory stores.

Belansky, the community development director, said the report gave him a positive outlook on the center's future.

"I don't think there's any reason not to be optimistic," he said.

Next steps for Chelmsford include a review of the study by the Center Village Master Plan Committee, which was formed after the study began.

Among the questions, committee member James Lane said, will be whether more housing is practical for the area, and if it is, what kind and where would be best, and whether it should be built as part of a mixed-use development.

A study of traffic, parking and pedestrian access is also slated to begin next month from the Northern Middlesex Council of Governments that will also assist with planning.

Follow Grant Welker on Twitter at SunGrantWelker.

City tax plan for housing growth earns state OK

By Lyle Moran, lmoran@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- The state has signed off on the city's blueprint to utilize a new tax-incentive program to boost creation of market-rate housing downtown.

The approval by the state's Department of Housing and Community Development of Lowell's Housing Development Incentive Plan -- as well as its downtown zone for the development -- means developers of eligible projects in the city center can apply for state tax credits and city tax breaks for building market-rate units.

The Housing Development Incentive Program is designed to boost the production of market-rate housing in 24 Gateway Cities across the state. Lowell was the second city after Pittsfield to have a zone and plan approved by the state.

Assistant City Manager Adam Baacke said he expects inclusion in the state program will help spur the next wave of redevelopment of vacant and underutilized buildings downtown, such as commercial buildings with empty upper floors.

"By supporting market-rate housing development, it can also help the city encourage more households with disposable income to live in downtown, which in turn strengthens the market for restaurants and retailers, who have been challenged by the recession," Baacke said in a statement.

"Lowell, more than most Gateway Cities, has seen this work really well, with thousands of new market-rate residents over the past decade helping to support dozens of businesses."

Additional market-rate housing also will help the city both attract and retain young college graduates, which could entice high-technology and green-technology companies to the city, as well as other large companies, said Baacke.

Eligible projects are those that result in the creation of two to 50 units of market-rate housing for sale or lease. The state is able to offer a tax credit up to 10 percent of qualified rehabilitation expenses up to \$1 million. There will be a \$5 million annual cap on the state tax credits.

The credits should help make market-rate projects possible because the economic downturn has made it more difficult for developers to finance such developments.

Low-income housing has continued to be produced during the past several years because of both state and federal tax credits that support the creation of that type of housing.

The state housing incentive program also allows for a local-option property-tax abatement on all or part of the increased property value resulting from improvements made to eligible properties. Accords on those exemptions are called Tax-Increment Financing agreements, or TIFs.

"The local tax abatements are a required component of the program if the state is going to provide the larger tax credits, so Lowell will pursue those on appropriate projects," Baacke said.

The city's housing plan and zone first were approved by the City Council.

City Councilor Bill Martin, chairman of the council's housing subcommittee, said he is glad the city's plan and zone were approved by the state. He said he hopes the incentive program can spur redevelopment of some of the more difficult properties left to develop in the downtown.

The councilor said the program also should help the city continue to improve the ratio between market-rate to affordable housing in the city center, which since 2000 has gone from 20 percent to 80 percent, to 50-50.

The key, Martin said, will be seeing whether the amount of tax credits allocated to projects is enough to make them financially feasible for developers.

"I view the state program as a positive, but not a game changer," Martin said. "The challenge is the properties that have not been redeveloped in the downtown are very expensive to redevelop without some significant financial assistance."

One project that could benefit from the tax incentives is the plan for 47 market-rate units in the historic Chalifoux building at the corner of Merrimack and Central streets.

Officials from the Department of Planning and Development have discussed the state incentive program with the Chalifoux development team.

They have also discussed the program with representatives from the Lowell Community Health Center, which may pursue residential development in the Hamilton Canal District geared its employees, said Baacke.

Several other properties could possibly benefit, he said.

The city had hoped WinnDevelopment's plan for 77 new units at the Boott Mills (West), 80 percent of which would be market-rate units, and Mira Development LLC's plans for more than 30 units of market-rate housing at the former Lawrence Mills complex on Perkins Street, could have participated.

The projects were deemed ineligible. Both projects are proceeding without the program, said Baacke.

Follow Moran on Twitter @lylemoran

Raytheon, Kuwait school, UML partner up

By Robert Mills, rmills@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- UMass Lowell faculty and students will work with Raytheon Integrated Defense Systems and Gulf University for Science and Technology, in Kuwait, as part of a partnership being developed by the three entities.

Chancellor Marty Meehan and officials from Raytheon and GUST signed a memorandum of understanding regarding the budding partnership at a ceremony at the Emerging Technologies and Innovation Center at UMass Lowell on Monday.

UMass Lowell Provost Ahmed Abdelal said details of the partnership are still being worked out, but that generally, the collaborative effort will see the two universities work with Raytheon to develop joint-degree programs at the undergraduate and master's levels.

Abdelal and other UMass Lowell officials, along with Raytheon representatives, have already visited the GUST campus in Kuwait.

Abdelal said UMass faculty could teach classes in Kuwait, and that students could have a chance to study overseas and work with a giant in the defense industry as specific programs are put in place.

Programs that are part of the partnership are expected to focus on sciences, engineering and business.

He estimated the first programs offered as part of the partnership may begin in the fall of 2013, with more programs being added later.

Kuwait has long been an important strategic partner of the United States in the Middle East, and Raytheon has had a presence in the country for more than 20 years, according to Sanjay Kapoor, vice president of Integrated Air & Missile Defense for Raytheon.

Meehan and Shuaib Shuaib, president of GUST, said the partnership will help prepare students and faculty to function in a global economy.

Raytheon, which has several local facilities and recruits many of its workers from local universities, has long been interested in higher education.

Christine Gillete, a university spokeswoman, said this partnership will be biggest involving Raytheon and UMass Lowell.

"We're delighted to connect further with Raytheon," Abdelal said.

Meehan said the partnership would be among 95 international partnerships, in 40 countries, that the university has entered into since 2009.

City Council backs plan to buy bulk electricity

By Lyle Moran, lmoran@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Residents and business owners could soon experience savings on their electric bills through a plan approved by the City Council Tuesday night.

Lowell's "municipal aggregation" plan calls for a third party to bring together nearly 40,000 electric consumers in the city to procure electricity in bulk, which would generate lower electricity prices for those consumers.

Under the program, Colonial Power Group of Marlborough, the city's consultant, would seek bids from energy providers who could offer residents and businesses a lower electric rate than National Grid's default basic rate.

Brian Murphy, president of Colonial Power Group, told The Sun similar "municipal aggregation" programs in other communities have yielded savings anywhere from 1 percent to 10 percent for consumers. The exact savings in Lowell will not be known until National Grid releases its rates for the time period in which the city's selected provider would be an option.

Consumers who participate in the city's program would still receive their bills from National Grid, but the rate listed would be the rate of the selected provider. Consumers would have the option of opting out of the program, but Colonial Power estimates 97 percent of the eligible consumers will participate.

The city would not be part of the bulk buying, but could be at a later date when its current contract expires, said Murphy.

The council voted 7-0 to approve the plan, with Councilors Ed Kennedy and Rita Mercier absent. Councilor Joseph Mendonca called the city's "Community Choice Power Supply Program" a "win-win" for all involved.

"We are providing a way for residents to save money on electricity without them having to do anything," Mendonca said. "If they do want to do something on their own and get a better program, they are free to do so."

David Ouellet, an independent associate for Viridian Energy, questioned whether electric customers in the city could still choose a renewable-energy option like Viridian under the new program. Murphy said they could.

With the council's approval of the city's plan, the city can now submit the proposal to the state's Department of Public Utilities.

If the state approves the plan, city residents may be able to purchase electricity from the selected competitive provider as early as next spring.

"The sooner we get this program in place, the sooner people start saving money," said City Manager Bernie Lynch.

At the request of Councilor Rodney Elliott, the Council will in the near future discuss in more detail the city's municipal aggregation plan.

In other business Tuesday, the Council:

- * Approved Vesna Nuon's motion requesting Lynch instruct the Law Department to review all possible zoning restrictions regarding any medical-marijuana dispensaries in the city. Nuon said he wants the city to try to prevent the dispensaries from being located near schools, parks and libraries.
- * Approved and referred to Lynch Elliott's motion to have the council discuss having a gun-buyback program in the city and find out whether funding from the city's Law Enforcement Trust Funds can be used for the program.
- * Approved John Leahy's motion requesting Lynch prepare a cost-analysis report regarding snow removal for average snowstorms.
- * Approved Leahy's motion requesting Lynch discuss with School Department about having no school in session on election days.
- * Approved Leahy's motion requesting Lynch have the proper department work with Friends of Lowell High to construct a new concession stand at Cawley Stadium.
- * Approved Marty Lorrey's motion requesting Lynch have a discussion with the superintendent of schools regarding the possibility of combining summer programs.
- * Approved Lorrey's motion requesting Lynch have the proper department explore the possibility of rezoning 160.1 Swan St. and all Bigelow Street to Suburban Single Family.
- * Acknowledged the appointment of Susan Halter to the Lowell Telecommunication Corp.'s board of directors.

Follow Moran on Twitter @lylemoran

New bridge, UML student center will transform once-distressed neighborhood

*By Katie Lannan, klannan@lowellsun.com Lowell Sun
Updated:*

LowellSun.com

LOWELL -- Every afternoon, Roger Levasseur sees hoards of reflective-vest-clad construction workers filling up his Salem Street shop.

"At 12 o'clock, there might be 20 guys lined up," said Levasseur, owner of the 95-year old Cote's Market. "They all come in here for lunch. And they do eat. Big appetites, these guys."

Levasseur said his sales have surged thanks to the crews working on UMass Lowell's new student center at the former St. Joseph's Hospital site and a replacement for the nearby Textile Memorial Bridge.

This business boost is the first step in what Levasseur and others hope will be a revitalization of the upper Merrimack Street area, spurred by these major projects.

"Years ago, it was blighted," Levasseur said of the area surrounding his family's market. "All of the growth in Lowell's been beneficial. Now you've got new buildings, you've got students coming in. There's always something."

The state is about 60 percent through its plan to construct a new bridge carrying University Avenue across the Merrimack River to join Pawtucket Street. Structural steel should be in place by the end of this year, with the new bridge open to traffic next September, according to the Massachusetts Department of Transportation.

The existing 116-year-old span is set to be torn down starting in October. The department expects to finish the \$29.4 million dollar project by October 2014.

At the south end of the bridge, between Merrimack and Salem streets, will be University Crossing, a 140,000-square-foot complex housing more than two dozen UMass Lowell departments, plus a food court and bookstore that will be open to the public.

"It'll be the social heart of the campus," said UMass Lowell Chancellor Marty Meehan.

And, Meehan said, it will also become an economic hub, as students, faculty and staff converge on the centralized facilities from across the university's north, east and south campuses.

"Just the increased people traffic around University Crossing should have collateral benefits to the small businesses in the area and will spur development of new small-business spaces," Meehan said. "The new campus center and renovations along Salem Street and this area are going to allow us to play a major role in the economic development of this neighborhood."

The new building has already sparked development, bringing in about 300 construction and related jobs, said university spokeswoman Christine Gillette. Another 100 workers are expected to be added as the project continues.

Renovations to an existing Salem Street building are slated to be finished by late next spring so that offices,

including the university police department, can be set up over the summer.

Gillette said the project is moving forward as scheduled, with demolition crews now at work on the Pawtucket Street property. Expected to be completed in December, the demolition will be followed by the installation of a foundation. The new building's steel shell will start going up in January.

Jim O'Donnell, president and co-owner of O'Donnell Funeral Home, hopes the ongoing development will usher in a rebirth for the neighborhood where his family's business has operated since 1884.

"Between the university and the expected commerce, what I hope it will bring is a strengthening of the inner city of Lowell, this particular section of Lowell that has been there since the beginning and is where the melting pot and a lot of our history started," O'Donnell said.

O'Donnell said that in the meantime, the traffic delays and occasional road closings can be minor annoyances to neighborhood residents.

"For those who are living there now, it does create some temporary inconveniences, but realizing what's going to happen when it's all complete is an exciting opportunity," he said.

Aside from "some pain-in-the-neck traffic issues," the projects have been well-managed and smoothly run, said Deb Chausse, executive director of the Merrimack Street-based family shelter House of Hope.

"Part of what else I'm seeing, along the Salem Street side, some of those abutters are all of a sudden doing home improvement projects, windows going in and the exteriors being improved," Chausse said.

From the changes in the neighborhood, Chausse wants to see a strengthening not only of its economy, but also of a sense of community and local ties.

Already, she's noticed this beginning, she said, with more people out and about on the streets.

"To see people walking around the neighborhood is really cool," she said. "I just hope to see a really distressed neighborhood continue to stabilize."

Follow Katie Lannan on Twitter @katielannan.

Saab Building's new owner bullish on downtown Lowell

By Dan O'Brien, dobrien@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- With a new judicial center coming as part of the Hamilton Canal District, the new owner of the iconic downtown Saab Building sees a lot of potential for its upstairs office space.

"With the judicial center coming, there should be more lawyers looking for office space," said Kevin Ahern, 39, of Lowell, during a telephone interview. "It made a lot of financial sense."

Ahern purchased the 36,000-square-foot structure, at 147 Central St., for \$700,000 from Saab Realty Corp. on Aug. 31, according to real-estate records. He said it was his first foray into commercial real estate, and termed it a "personal investment."

The building includes 12 retail spots on the ground floor, all of which are filled, Ahern said. Tenants include the Reservations restaurant, two salons, a nail business, clothing store, beauty-supplies business and a dental office. He said a tax accountant has offices upstairs, but about half that space is currently vacant as Saab Realty Corp. business is gone.

For many years, the late Lowell lawyer and real-estate investor Louis Saab ran his business from the second floor of the building. Saab died in August 2010 at age 80, and his trust has gradually sold some of his properties since that time.

Ahern is co-owner of The Beacon Group, a Tewksbury-based global logistics and engineering company. He is also a member of the Lowell Zoning Board of Appeals.

The building was constructed in 1912 with elements of neoclassic and arts-and-crafts patterning, and was originally named "Bradley Block," according to Steve Stowell, administrator for the Lowell Historic Board. It underwent exterior rehabilitation in the early 1980s, he said.

In more recent years, the facade has read "Saab Building," as Saab had owned it and ran his legal and real-estate business from it since the early 1960s.

"It has always been very prominent on Central Street, with shops on the ground floor and a combination of shops and offices on the second floor," Stowell said, adding that the upstairs is designed like an indoor mall, with a common hallway leading to shop space and professional offices. "It's great that it was bought by someone with his heart in the community."

One tenant, Helen G. Roy, co-owner of H&F Beauty Supplies, hopes some of that concern will rub off on her business, which opened two months ago and is off to a slow start.

"I moved here from Boston because I thought it would be better to be in a small city," she said during an interview at her store Monday morning. "In Boston the rents are so high and all the construction has really hurt businesses."

"But it hasn't been very good so far (in Lowell). I hope it picks up."

Al-Hassan Mansaray, owner of Al's Clothing, a retailer of casual and hip-hop clothing, has run his store from the Saab Building since 2005. He hopes that his new landlord will continue the positive relationship Mansaray had built with Saab.

"He is doing the little things to make the building look better, like cleaning the windows, getting rid of junk in the basement," Mansaray said. "He seems like a good guy. The thing about Louie, when I first came here and struggled, he gave me advice on how to build business. He was always positive, and that is tough to replace."

Ahern, who said he knew Saab on a professional level, said his immediate plans include general maintenance inside and outside and "sealing up the building." He said he has met all of his tenants, as well as with Stowell in the event that any potential renovation plans have historical implications.

Ahern said The Beacon Group will remain at its present headquarters at 500 Clark Road in Tewksbury, although he has opened a temporary office in the Saab Building for his own property duties.

The Central Street parcel that includes the Saab Building is assessed at \$1,155,900, according to city records.

Follow Dan O'Brien on Twitter @dobrien_thesun.

Billerica affordable-housing development in final stages

By *Evan Lips, elips@lowellsun.com* Lowell Sun

Updated:

LowellSun.com

BILLERICA -- A long-proposed 26-unit Rangeway Road townhouse development is in its final permitting stages, despite concerns from selectmen that the project will further strain the town's infrastructure.

Ava Estates, proposed for 90 Rangeway Road and formerly known as Arakelian Farms, has been the root of various neighborhood legal spats since 2006.

According to an attorney representing the developer, as quoted in selectmen's meeting minutes from Oct. 15, any litigation "has since been settled."

Local Realtor Allan Arakelian had been the original applicant, but wound up selling the project to Tyngsboro developer Peter Cricones.

Reached Monday, Arakelian deferred questions as to when construction might begin to Cricones.

Cricones could not be reached by press time.

Of the 26 units, four have been designated affordable, but that classifies the project as a Chapter 40B development. Instead it is listed under the state's Local Initiative Program, another program that encourages creating more affordable housing.

Selectman Mike Rosa, however, has labeled it as a 40B "hybrid," although the project still must earn a comprehensive permit from the town, a process 40B developments are able to skirt around.

"Whenever you have a high-density development in a part of town that was never planned for, you impact the structure of the entire town," said Rosa.

Rosa said 40B projects have "damaged" Billerica, citing the 380-unit Concord Crossings located off Concord Road.

"This is all stuff we haven't planned for," he added.

As of last spring, about 8.21 percent of Billerica housing was classified as affordable. The town's goal is 10 percent.

Selectmen approved the LIP application for Ava Estates, 4-1, on Oct. 15, with Rosa casting the lone "no" vote.

Follow Evan Lips at [Twitter.com/evanmlips](https://twitter.com/evanmlips)

AMSC cuts workforce by 25 percent

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

DEVENS -- AMSC, formerly American Superconductor Corp., announced Wednesday that it has reduced its workforce by 25 percent and is consolidating office space to lower operating costs by about \$10 million annually.

The workforce reduction affects approximately 110 positions, as the company announced its global headcount now stands at about 340.

"While the long-term prospects for renewable energy remain bright, conditions in the sector today are challenging," CEO Daniel McGahn said in a statement.

AMSC, which makes makes components used in wind turbines and power grids, said it would incur charges of about \$3 million to \$4 million over the next two quarters.

The company said it expects to pay about \$2 million in severance costs.

The news comes almost a year to the day after a similar announcement, as AMSC is embroiled in a global court case with its former top customer, China-based Sinovel. AMSC accuses Sinovel of paying off an AMSC employee to secure company secrets.

Shares of AMSC were at \$2.72, down a penny in early trading Wednesday.

Making the medical-device push

By Evan Lips, elips@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Growing the region's budding life-sciences industry involves more than simply coaxing businesses to trade Cambridge space for that in the Merrimack Valley -- it's also about convincing them to stick around.

Rick Geoffrion, president and CEO of Tewksbury-based Mitralign, said Tuesday his medical-device business is in its clinical stages of Food and Drug Administration permitting but is already in the fast lane in Europe, where its product is expected to hit the market in early 2014.

Mitralign, a 45-employee company in the process of developing a catheter-based system aimed at providing an alternative to open-heart surgery, is growing. In October, it collected a \$1.9 million injection of equity funding.

Simply put, someday soon Mitralign will need a bigger building than its current digs at 3 Highwood Ave.

"We need to think about moving but we've made the decision to stay here (in the area)," Geoffrion told a room full of life-science industry power players who gathered at UMass Lowell for a conference organized by the Middlesex 3 Coalition. "It's a sweet spot."

The Middlesex 3 Coalition is a regional collaboration of public and private leaders from Lowell, Billerica, Chelmsford, Bedford and Burlington. It's tasked with helping local businesses flourish. UMass Lowell has been a partner in that mission, especially when it comes to life sciences, university spokeswoman Christine Gillette said earlier this week.

Gillette pointed to UMass Lowell's Office of Commercial Ventures and Intellectual Property, which she said helps move innovative technologies from school laboratories into businesses.

Virtually every business leader at Tuesday's conference stressed the important of available "wet lab and clean space," referring to areas home to critical experimental research.

Geoffrion's description of the Merrimack Valley as a "sweet spot" for life-science businesses comes from a combination of its affordable location and access to top talent from UMass Lowell.

Bob Buckley, senior partner at Boston-based Riemer & Braunstein LLP and a Middlesex 3 Coalition board member, said he was "amazed" during a recent visit to Europe when he heard UMass Lowell come up in conversations in the same breath as the Massachusetts Institute of Technology.

Peter Abair, director of economic development and global affairs for the Massachusetts BioTech Council, said his Cambridge office space only became available when the Dyax Corp., a biopharmaceutical company, moved to Burlington.

For local life-science companies to stay in the Merrimack Valley and continue growing, it will take not only work space ideal for build-outs, but also capital.

Nancy Briefs, CEO of InfoBionic, which specializes in the development of wireless cardiac monitors, said the region's labor pool is "phenomenal" but added area start-ups "could use a little more active involvement from investors."

One important component, according to Briefs, is convincing serious investors to look outside of Boston.

InfoBionic moved from Cambridge to Lowell in 2011. She said the company needed to surround itself with "like-minded entrepreneurs" and an "ecosystem" of other medical-device companies.

Entrepreneurs, however, cannot function without seed money. One participant at Tuesday's conference asked Briefs about how to lure more investors to consider Greater Lowell.

Briefs suggested keeping the lines of communication channels between areas open.

"If you meet with someone, tell them about the other great company down the road," she said.

Follow Evan Lips at [Twitter.com/evanmlips](https://twitter.com/evanmlips)

Judge rules in favor of 40B development in Chelmsford

By Grant Welker, gwelker@lowellsun.com Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- An Appeals Court judge has ruled in favor of a proposed affordable-housing development on Littleton Road that has been tied up in legal challenges since obtaining permits in 2008.

Abutters to the controversial development, Hillside Gardens, appealed the project to the Land Court weeks after the town approval was granted, arguing that the proposal was not compatible with its more industrial surroundings and that if a crane were to fall, it could damage a residential unit.

A judge dismissed that suit, brought by the owners of the next-door Chelmsford Crane Service, in 2010. But the following year, the Appeals Court reversed the earlier decision, saying the abutters had sufficient standing in the case. The case was sent back to Land Court, where a judge ruled in favor of the development, saying concerns of potential damage from falling cranes at the industrial site was not severe enough that Chelmsford public-safety departments would oppose the proposal.

The ruling also found that noise and light concerns cited by Chelmsford Crane were mitigated by insulation, fencing and landscaping proposed by Hillside Gardens. Water runoff from severe storms, which the abutters said would constitute trespassing onto their property from the proposed development, would not be different from existing runoff conditions, the judge said.

The Appeals Court ruling, issued Monday, agreed with those decisions.

Hillside Gardens, which would be built at 311 Littleton Road near Chamberlain Road, is permitted for 44 two-bedroom townhouse units, said Evan Belansky, the town's community development director. One-fourth of the units would be sold at affordable rates.

The developer, Emanouil, Inc., intends to move ahead with construction but isn't sure when it may start building, Belansky said.

"The developers are certainly committed to the project," he said. A message left with Emanouil Thursday afternoon was not immediately returned.

Hillside Gardens is a 40B development, which communities in Massachusetts must allow unless they meet a threshold of 10 percent of housing units priced at affordable levels. In Chelmsford, about 7 percent of the housing stock is deemed affordable, Belansky said. Developers are able to build with more density under 40B regulations.

The town had an obligation to approve Hillside Gardens under a comprehensive permit law, Town Manager Paul Cohen said. "It affirms the decision made by the Board of Appeals," he said of Monday's ruling.

Follow Grant Welker at [Twitter.com/SunGrantWelker](https://twitter.com/SunGrantWelker).

Thermo Fisher Scientific adds jobs in Chelmsford

By Grant Welker, gwelker@lowellsun.com Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- Thermo Fisher Scientific Inc., a maker of instruments and laboratory equipment, has expanded its Chelmsford operations to include a new center for testing components in water, adding about 100 jobs.

The company, based in Waltham and with about 39,000 employees worldwide, also has an analysis unit, called high-performance liquid chromatography, in the same building on Alpha Road. A total of 132 workers are now based in Chelmsford.

Thermo Fisher Scientific marked the occasion of its expansion with a presentation on Tuesday of a check for \$2,000 to Chelmsford High School's media center and for science-education programs.

The water analysis lab had been based in a leased building in Beverly but the company had sought a permanent home near its headquarters and other life science companies and universities, said Mark Dymont, the company's director of global operations.

"Chelmsford became a major opportunity for us," he said.

Thermo Fisher Scientific also makes laboratory instruments used for experiments and supplies such as beakers and test tubes.

Follow Grant Welker at [Twitter.com/SunGrantWelker](https://twitter.com/SunGrantWelker).

Lowell's Varnum School to house war veterans

By Lyle Moran, lmoran@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Once full of children learning about the country's war heroes, the former Varnum School is slated to reopen as a housing complex targeted for those Americans returning from recent service and those who served years ago.

Underwood Property Management and Development LLC plans to spend close to \$2 million transforming the historic school property into 22 two- and three-bedroom housing units.

The City Council voted last week to approve the Lowell development company's proposal to buy the property from the city for \$285,000 to carry out its plan.

The former school on Myrtle Street will be privately-owned, but the new owners of the site say they will give veterans preference to secure units in order to create a vibrant and tight-knit community for those who have sacrificed so much for their country.

"They will have an Esprit de corps and will be able to support one another," said Tom Underwood, a co-partner of Underwood Property Management and Development. "They will also be able to relate to each other in ways only those who have served can."

For Underwood, a lieutenant in the Lowell Fire Department, and his brother and development co-partner Ricky Underwood the idea to create housing for veterans stemmed from their personal histories.

When Ricky Underwood's son Ryan returned from serving in the U.S. Army's special forces in Iraq several years ago, his son moved into a tiny apartment above a convenience store.

"I remember thinking my son and other veterans like him deserved better," said Ricky Underwood, who is also the head custodian at the Sullivan School.

Tom Underwood, a 21-year Army veteran and the city's former deputy director of veterans' services, agreed, knowing that the need is there. His son has also served the country.

The brothers had looked at the former Butler School in Lowell to see if that could be a possible site for housing targeted to veterans, but decided it needed too much work.

After a tour of the former Varnum School, which has been vacant about five years but remains in good shape, they both agreed it was the perfect opportunity to make their goal a reality.

The brothers envision a community room where information about different benefit programs for veterans could be provided.

They also hope people who know of veterans in need of housing will tell them about the Varnum

apartments, and the brothers have already been in contact with the Lowell Housing Authority about directing veterans their way.

"The space is beautiful and renovating it into apartments is a way to do something for the veterans, make sure there are quality tenants and do something for the city," Ricky Underwood said. "We are thrilled with the opportunity."

The units could be online and ready for occupancy in early 2014. Washington Savings Bank is financing \$1.55 million of the project and the Underwoods are putting up more than \$300,000 for the work.

After the renovations, the property is expected to generate \$30,000 in annual property-tax revenue to the city. The units will be market-rate or lower in price, which will be determined based on the renovation cost.

The proposal calls for empty classrooms to come to life with granite countertops and stainless steel appliances.

The Underwoods, who restored the historic Peter Powers House on Lawrence Street, also plan to try to keep the historical building's architecture in tact as much as possible.

The brick exterior will be cleaned, the hardwood floors inside will remain, the large hallway corridors will stay as they are and even some classroom chalkboards could be maintained.

Some of the wooden trusses in the south-end attic below the building's bell tower could even remain and the half-room windows will be highlighted. The original archway entrance on the Myrtle Street side of the building will be restored.

City officials are excited about the prospect of seeing the school building come back to life and believe it will be a boon to the neighborhood.

"I'm excited to see the building renovated and brought back to its previous glory," said Patti Lucken, the city's asset manager. "The neighbors will be happy."

The Underwoods' plan for the former Varnum School also secured the backing of the Centralville Neighborhood Action Group, which sent the city a letter of support for the project.

Sandy McNamara, president of the group, said the Underwoods' focus on veterans helped generate enthusiasm for the project in the neighborhood.

If the Underwoods actively market the property to veterans, they should be successful in filling the building with them, she said.

"They are over there fighting for us and they deserve to come home to a nice, happy home," McNamara said. "It sounds like an awesome idea and I hope it will work."

Ann Marie Page of Fremont Street said the neighborhood also warmed up to the Underwoods' plan more than other proposals for the Varnum site because the housing will not be "low- or no-income" housing.

A previous Community Teamwork Inc. of Lowell proposal called for more than two dozen affordable rental units at the site.

"I think people in the neighborhood were afraid to have a housing project in the middle of the neighborhood," Page said.

"We all support working-family housing to help veterans coming home get on their feet and get settled."

Follow Moran on Twitter @lylemoran.

Andover biotech eyes Tewksbury site

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

TEWKSBURY -- An Andover-based company that makes research biochemicals has leased 38,500 square feet of space at Highwood Office Park on the Tewksbury-Lowell line, according to the Boston Globe.

Citing real-estate broker Cushman & Wakefield, which represents the Tewksbury property's landlord, the newspaper reported that Cambridge Isotope Laboratories Inc. plans to relocate some of its operations.

The Globe reported that Cambridge Isotope plans to convert more space at its headquarters into lab and research space and transfer some administrative and laboratory personnel to Tewksbury.

Cambridge Isotope, which is privately held, employs about 130 people in Andover, according to its website.

LRTA to expand Saturday service

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Attention, bus riders.

It will soon get much easier to visit downtown Lowell, shopping plazas in Tewksbury, and Lahey Clinic in Burlington, as the Lowell Regional Transit Authority plans to double its weekend service on those routes.

Buses will also run far more frequently on Saturdays for other routes across Lowell, Dracut and Billerica.

Expanding Saturday services, particularly for the routes along which riders only see a bus come by every couple of hours, has been the LRTA's goal, said Executive Director Jim Scanlan, who also hopes to improve weekday services in the future.

"This is a great start -- something long overdue," Scanlan said.

"It's a tremendous extension of our existing program," said Kevin O'Connor of Tyngsboro, chairman of the LRTA's advisory board. "It's something we have been working on for a very, very long time."

Starting Saturday, Jan. 12, the LRTA will have a new weekend schedule that increases the number of bus trips by 40 percent. Routes 1 and 8 -- the Christian Hill and Centralville routes that are merged into a single route on Saturdays -- will have 10 inbound and 10 outbound trips, up from the current five inbound and five outbound.

Routes 3 and 4, a merged route serving South Lowell and the Highlands, and route 12, which runs along Route 38 from Lowell to Tewksbury, will also see the number of trips double from five to 10 for both inbound and outbound.

The number of trips for route 14, which runs between Lowell and Lahey Clinic, will increase from six to 10 both inbound and outbound.

Route 17, which serves North Chelmsford, will have four more inbound and four more outbound trips, while route 10, which serves Dracut and Tyngsboro, as well as route 13, which serves Billerica, will have three more inbound and three more outbound trips.

The service expansion is the result of an additional \$150,000 the LRTA recently received from the state for the current fiscal year. The transit authority knew exactly how it wanted to use the money, Scanlan said.

"The first priority we have in terms of improving our operation is Saturday service," Scanlan said.

The LRTA, which operates on a \$10 million annual budget, which includes \$4.8 million in state and federal funding and \$2.4 million in local assessments, has managed to maintain the service it has but little more, Scanlan said.

On Saturdays, routes serving South Lowell and the Highlands, as well as Christian Hill and Centralville, have had two morning and three afternoon bus services, while the routes serving Belvidere, Westford Street toward Drum Hill and Pawtucketville via the UMass Lowell North campus have five morning and six afternoon bus services.

Scanlan calls the Belvidere, Westford Street and Pawtucketville routes "long-standing, productive routes." For example, between January and August, the Pawtucketville route logged 126,946 rides, the Westford Street route 106,323 rides, and the Belvidere route 71,004 rides, while there were 31,818 rides for the South Lowell route alone and 70,802 rides when it's combined with the Highlands route. All of those numbers include weekday rides.

Some riders use buses to commute to work, while others use them for medical appointments or grocery shopping. Still others take buses to the train station, and others switch buses at the Gallagher Terminal.

Asked for what purposes the riders from the "productive" routes use the bus and where they go, Scanlan said he did not have that information, other than that they run along major transportation corridors. He also said there is no demographic data collected on the riders and said he did not know what percentage of LRTA riders take the train.

O'Connor, however, said that the LRTA held public hearings in November on its service in each of the communities it serves.

"We listened to them and are happy and proud that we instituted this new service," O'Connor said of the Saturday schedule expansion.

Tewksbury Selectman David Gay, who serves on the LRTA advisory board, said some residents wish the bus service was better. He said he sees Saturday buses running near-empty and hopes the new schedule will make it convenient enough for people to use the service.

Scanlan said having fewer riders doesn't necessarily mean there is less demand for bus service in certain neighborhoods. The more bus services are available, the more people would use it, he said, adding that it makes sense to boost service on routes that serve large shopping plazas and medical centers -- such as the Tewksbury route. The additional \$150,000 enables the LRTA to do that, he said.

To see the new Saturday schedule, visit www.lрта.com.

Follow Hiroko Sato @SatoLowellSun.

Developer hopes rehab will attract business tenants

By Lyle Moran, lmoran@lowellsun.com Lowell Sun
Updated:

LowellSun.com

LOWELL -- The flaky orange paint that once covered the exterior of the boxy Freudenberg Nonwovens building has been replaced by a sharp, three-shades-of-tan scheme reflecting the structure's concrete core.

Historic windows that once graced the five-story building -- and were filled in with concrete -- have been restored to their original design and space.

And the debris-filled structure has been gutted and cleaned to show off its strong, concrete columns on its middle floors that were once home to industry.

As Larry Sparrow, Trinity Financial's senior construction-project manager, puts it, "What was once the biggest eyesore in the area has been transformed into a pretty sharp-looking building."

But the question of who will fill the revamped 55,000 square feet of office space in the rehabbed commercial property at 110 Canal St. remains.

That's because Trinity Financial, a Boston firm hired by the city to oversee the \$800 million development of the Hamilton Canal District, decided to rehab the Freudenberg building "on-spec," or without tenants lined up.

It's a bold move, according to commercial real-estate experts contacted by The Sun, because of the risk that tenants won't fill the space after millions of dollars are sunk into rehab work.

However, those experts say on-spec projects also have the potential to attract tenants who could not envision the space before renovations as a future home for their business. So such projects can be a risk well worth taking, they said.

Rebecca Herbst, a research analyst with Jones Lang LaSalle of Boston, said property owners and developers walk a fine line when deciding whether to do on-spec work.

A commercial building that is clean and is near ready for occupancy is more enticing to potential tenants than one that needs a major makeover, Herbst said.

But in a slowly improving economy, most property owners are reluctant to invest millions of dollars upfront to rehab commercial space without assurance of return on their investment, she said.

"In today's environment, it is quite difficult for landlords to invest in rehabbing facilities without knowing tenant commitment," Herbst said. "Trinity Financial is more of an exception rather than a trend."

Eric Anderson, vice president of leasing and operations for Cummings Properties of Woburn,

agreed that rehabbing commercial properties on-spec is not the norm, especially because of the potential for failure.

"There's always risk because you can spend all sorts of money on improving buildings, but if the economy does not turn around and no tenants come on board, you can have all sorts of bills to pay and no source of revenue," Anderson said.

However, Anderson said his commercial real-estate development firm has had many success stories with on-spec projects over the last five-plus years. He cited the Trade Center project in Woburn as an example. He said 95 percent of the commercial space located around the Middlesex Superior Court building is leased.

Anderson said one of the keys to the company's record is that it does not hold any debt on the properties it takes over, which is a financial luxury other commercial developers don't have.

"We can take more risk than others, and we have had great results doing so," Anderson said.

Abby Goldenfarb, Trinity's project manager in the Hamilton Canal District, acknowledged in an interview that rehabbing Freudenberg on-spec was "a bold move."

She said the \$8.5 million "core-and-shell" rehab is the first on-spec project for a 100 percent commercial space that she can recall Trinity undertaking. But she said it was a necessary move because lining up tenants for the site while it remained a dilapidated building would prove difficult, she said.

"People could not get beyond the look of the building as it was," Goldenfarb said. "As people are seeing the building take shape, it is becoming more real to them."

Trinity is working with CB Richard Ellis of Boston to secure tenants to lease the building. Goldenfarb said there have been conversations with a number of young, innovative technology firms, but no definite commitments as of yet.

The ideal end result would be one company filling the whole space, Goldenfarb said, but the building can accommodate two tenants per floor. The building will be ready for tenant fit-up beginning in February, and the rehab work should be complete by April.

Goldenfarb said she remains confident that Trinity will be able to fill the building.

"We really believe strongly in the Lowell market, as evidenced by our ability to complete the Appleton Mills project during such a difficult economic time," said Goldenfarb, referring to the 130-unit, affordable-housing complex in the district.

City officials also are optimistic about Trinity's prospects.

"The dramatically improved appearance, combined with a highly visible and easily accessible location, plus the amenities of downtown Lowell, should make this a very attractive office

property," Assistant City Manager Adam Baacke said.

The on-spec rehab should also help Trinity meet the timelines of businesses looking to relocate, Baacke added.

Several interests looking for commercial space in the 5,000- to 20,000- square-foot range in Lowell in recent years required occupancy within three to six months of their decision to relocate.

Neither the Freudenberg building nor the 43,000 square feet of commercial space Winn Development is developing at the Boott Mills could meet their deadlines. Some decided to move elsewhere in Lowell or to other communities.

"Both are likely to be in a good position to meet these timelines starting this spring or summer," Baacke said.

Follow Lyle Moran on Twitter @lylemoran.

It's 'go time' for Billerica company's robots

By Evan Lips, elips@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BILLERICA -- Back-breaking work in a nursery yard might just be a thing of the past if Harvest Automation has its way.

The Rangeway Road company is turning out an army of high-tech robots that perform a thankless, labor-intensive job -- moving potted plants and spacing them appropriately.

A recent visit to the company's ordinary-looking offices resulted in an extraordinary experience.

A rolling robot, standing about 2 feet tall, made a beeline across a spacious section of matted floor set aside from the rows of employee cubicles. Nicknamed DynaGuy, the robot sped toward a cluster of pots. Bags of gravel, measured to mimic the weight of the average shrub, sat inside the pots.

With its self-adjusting clamps, DynaGuy sized up one of the pots and, in one swift and continuous motion, hoisted it. The robot then performed a driver's-ed worthy three-point turn and sped off to the other side of the room. DynaGuy deposited the faux-plant within a staggered row of fellow pots.

The entire process took less than 20 seconds. DynaGuy continued to do its job with precision, building a row of pots spaced exactly a foot-and-a-half from each other.

"One of the biggest growers in the country says quality of product is the number-one concern," Harvest Vice President of Business Development Greg Timbol said as DynaGuy effortlessly arranged dozens of pots.

With DynaGuy, there's no language barrier between grower and laborer. If a pot needs to sit exactly 2 feet away from a neighboring shrub, DynaGuy will do it, thousands of times over.

One of the best features, chief technologist and inventor Joe Jones said, is that DynaGuy doesn't need a computer expert to tell it which way to turn. Anyone can click a few buttons, and the parameters are set.

"There's no need for someone to stand there with a joystick," he said.

"It's tough to appreciate this kind of capability at your average garden store," said John Kawola, Harvest's CEO. "We're talking nurseries with hundreds of acres and literally millions of pots."

Kawola joined Harvest at the beginning of the month. Co-founder Charles Grinnell, the former CEO, is remaining on board as the company's chief operating officer.

Kawola previously helped bring Burlington-based Z-Corp to the forefront of the digital printing industry. He brims with enthusiasm about Harvest's band of plant-moving robots, collectively known as "Harveys."

"My background is helping to take products to market," he said. "We're at the point right now, after a few hard years of market research, where it's go time."

Harvest already has one intensely loyal customer in Georgia -- McCorkle Nurseries. Located just west of Augusta, McCorkle boasts more than 4.5 million container plants spread out across 420 acres.

Chris McCorkle, vice president of operations, said in a phone conversation Thursday that "there's never been anything quite like this" introduced in the industry.

He spoke of the growth in recent years of more rigid laws and policies in regard to the hiring of migrant workers. McCorkle said all of the nursery's laborers are legally documented but added that the "changing dynamic of labor laws" has made business more difficult.

"Our single biggest expense is labor," he said.

Springtime is his most crucial season for taking orders and shipping plants. Fetching potted plants takes time away from workers who could be logging sales or driving trucks. McCorkle said the spacing of plants is "one of those things that falls to the bottom of the pile" in terms of employee priorities.

McCorkle Nurseries will have six Harveys this spring ensuring that the transport of plants is literally conducted like a well-oiled machine.

At Harvest's Billerica headquarters, Jones said the idea for Harvey was born out of a need to transition from his day-to-day work at iRobot. As iRobot's first employee, Jones co-invented Roomba, the floor-cleaning machine that helped fuel iRobot's growth. Jones said he liked his work at iRobot but wanted to try something different. Since any invention he helped develop at iRobot would have been under that company's ownership, he decided to form new partnerships.

"I didn't really care about floor care," he said. "We had to break out to find something new."

Jones said he brainstormed with other like-minded engineers for months. The "ah-ha" moment came at a Boston agriculture trade show several years ago from a representative of a Sudbury nursery farm.

"He told us about the single biggest problem facing his industry," said Jones, referring to the time-intensive task of moving millions of potted plants.

"If we can't build a robot that does this, then we're in the wrong business," Jones said.

Harvest was launched with simple beginnings in the pool room of Grinnell's Groton home. Then came the move to Billerica, millions of dollars from venture-capitalist investors and never-ending hours of research and development.

Today, Timbol said the company has four major customers in Alabama, California, Ohio and

Georgia. Each robot costs about \$30,000; they are sold in packs of four.

Other benefits of Harveys, Timbol said, include the fact that they're not large, hulking machines. One weighs a little less than 90 pounds, and if it flips over and falls on another worker, he or she will likely receive minor bumps and bruises instead of a trip to the emergency room.

Harveys are also designed to work in teams. While each can lift a 20-pound pot by itself, if one loses a screw or needs fixing, the rest of the team is not hampered.

Kawola said he hopes to expand on Harvey's capabilities in the future.

"We heard from growers who said they wish they had a robot that could pick strawberries," he said.

Someday, a robot could be programmed to water the plants, too.

"Is moving pots a billion-dollar market? We're not so sure, but we're certain this company can expand on that," Kawola said.

Follow Evan Lips at [Twitter.com/evanmlips](https://twitter.com/evanmlips).

New UML dorms take shape

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- This winter, which had been relatively mild until the snowstorm last weekend, helped University of Massachusetts Lowell make progress on construction of its two dormitory buildings.

Construction crews are keeping busy building University Suites, the 148,000-square-foot building on Aiken Street, and Riverview Suites, the 173,000-square-foot building on South Campus, which are both slated for openings in the fall.

Roger Hall, project manager for the University Suites construction, said the weather has been cooperative for the most part and deliveries of building materials have been on time. Workers will begin installing drywalls this week, Hall said on Friday.

The \$54 million University Suites will accommodate 472 sophomores, juniors and seniors in four- and six-bed units. The building will also have faculty residences as well as an "honors program" floor where only those participating in the academic enrichment program can qualify to live, according to Joe McCarthy, director of residence life at UMass Lowell. University Suites is the first new residence hall on campus in two decades.

The \$42 million Riverview Suites, which will house 510 students, is being built by Soho Development, from which the university will lease the facility.

The university, which is aiming to become a more traditional university rather than a commuter school, has said it needs more dorm rooms as enrollment has risen.

The university has 15,000 full- and part-time students in its undergraduate and graduate programs, according to the school's website, and 3,500 students live on campus.

NMCOG, communities land state grants

By Allison Thomasseau, Sun Correspondent Lowell Sun

Updated:

LowellSun.com

Lowell-area towns and government groups have received more than \$150,000 in community development grants to develop regional collaborations that will promote efficiency in transportation and stormwater management.

The state Executive Office of Administration and Finance's community innovation challenge grants provided \$2.25 million to 27 regional community projects statewide. The projects, involving 162 towns, aim to combine town services, such as 911 dispatching and property assessing services, into a regional collaboration.

"Whether you're in a small town in a rural area or a big city in a metropolitan area, there are ways to partner, and these grants build on that," Lt. Gov. Tim Murray said at a meeting of 75 grant recipients on Tuesday.

The North Middlesex Council of Governments, a regional planning agency serving Greater Lowell, received a \$98,000 grant to start a storm water education and management program.

Under the collaborative, cities and towns invest in their own infrastructure, but work with nearby towns to coordinate their efforts and public education campaigns.

"The biggest impact is going to be cost savings," said Jay Donovan, assistant director of the council. "Cities and towns won't have to run their own programs, and we'll have a regional focus on how to deal with storm water."

Stormwater management costs the North Middlesex region about \$1.9 billion annually, but new U.S. Environmental Protection Agency regulations mean costs could increase.

The North Middlesex Council of Governments estimates the collaborative could save \$285,000 to \$570,000 annually.

In another grant, Acton, along with six surrounding towns, including Westford, received a \$60,000 to launch a regional transportation association.

Acton will receive the grant to work with other municipal partners to consolidate commuter transportation, such as van service, that overlaps in each town.

"We're trying to share transportation resources, and the money will help us bridge the two different (regional transportation authorities) by considering establishing a transit management association," Westford Town Manager Jodi Ross said.

Last year, these communities received an \$184,575 innovation grant to study the benefits of sharing the transportation. This year's grant will put those findings into action.

"We're trying to be more effective in how we provide transportation to our residents," Ross said.

The grant program awarded \$4 million in 2012, its first year, to 27 community projects. It was created to establish partnerships between the local and state government to promote economic innovation and growth.

State budget cuts decreased funding this year; most grant applicants did not receive the full funding they requested. The projects received enough to cover initial start-up costs, and but will need to find other funding to continue operating.

Pam Kocher, administration and finance's director of local policy, said the committee looked for programs with a wide appeal.

"We were looking for projects with a potential to be useful to other communities," she said.

Kocher said Boston's Citizens Connect smartphone app, which was launched in 2009 with innovation grant money, is the type of idea the office was looking for. Citizen's Connect lets residents report neighborhood issues, such as potholes, and is now used in 35 Massachusetts communities, including Ayer and Fitchburg.

Lowell residents road-test proposed master plan

By Marie Donovan . Sun Correspondent Lowell Sun

Updated:

LowellSun.com

LOWELL -- A diverse group of residents came together Wednesday to offer input on the city's proposed new master plan, "Sustainable Lowell 2025."

The public-input session was one of two this week and was paired with feedback from an 800-household telephone survey and other solicitations of public input coordinated by neighborhood planner Allegra Williams.

Emily Rosenbaum, executive director of the Coalition for a Better Acre, said the need for affordable housing in her neighborhood is significant.

"We have a 1 percent vacancy rate in our housing. The demand for it is tremendous," she said, noting the coalition caters to families with annual incomes ranging from \$25,000 to \$55,000.

Philip Ferreira, a facilitator for the meeting who works in the city's Department of Planning and Development, said city officials will try to mesh needs like the coalition's with the need to help bring more market-rate housing into the city to help drive its economic engine.

"It's a balance," he said.

"We're doing great at attracting young professionals, but six of my friends are buying houses in Chelmsford or Westford when their kids hit school age. How do we work on that issue?" asked library trustee Marianne Gries.

Corey Sciuto, a downtown resident, suggested the city continue to embrace social media to keep English and non-English-speaking residents informed, while Jane Calvin, executive director of the Lowell Parks and Conservation Trust, highlighted a partnership between the schools and Mill City Grows, which helps get fruit trees planted on school grounds for students to care for.

The city's assistant human resources director, Donna McIntosh, noted there's already a program in place called "Operation Rosebud" that pairs students in ROTC with elderly and disabled residents to help them clear the snow in front of their homes.

Kim Scott, a School Committee member who also has served on the solid waste and recycling committee, said she would like the city to eventually go to single-stream waste removal.

Miriam Perkins, a volunteer at the International Institute, said she would like the city to do more to address immigrant-housing needs, while resident Melissa Carino said she would like the city to look to the example set by Portland, Ore. in ensuring neighborhood equity.

"Portland has an office of equity. I was wondering if Lowell would open something like that?" she said, noting the office could review city policies to ensure none of the various neighborhoods are

neglected.

While affordable housing concerns were top for some attendees, protecting neighborhood character is a big issue for The Pawtucketville Citizens Council, said the group's co-Chairman, John Hamblett.

"We need viable zoning to prevent all our single-family housing from becoming two-family housing," said Hamblett.

City Manager Bernie Lynch, Anne Marie Page and her colleagues from the Citywide Neighborhood Council, city Economic Development Director Theresa Park, Maria Dickinson from Planning and Development and Wastewater Utility Executive Director Mark Young were in attendance, along with UMass Lowell political-science professor John Whiting, Community Planning Librarian Sean Thibodeau and Barbara Gagel, a painter who recently moved back to the city from New Mexico.

Mike Frye, a Highlands resident, said he was pleased with the input session, particularly on environmental-resilience issues.

"There's lots of great energy here today. The event was very, very detailed," Frye said.

"The cities that are flourishing now have a distinct sense of place. Innovative new entrepreneurial ventures will drive the economy going forward," said Adam Baacke, director of Planning and Development for Lowell.

Baacke praised a recent entrepreneurial program funded by a \$5 million Federal Department of Energy grant that allowed National Historic Register buildings within the national park to be retrofitted with green-building features, noting the area has the oldest lede-certified building in the country.

Gateway Cities like Lowell eyed for \$1.7B economic boost

By Chris Canire, ccamire@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BOSTON -- A new report being released by MassINC today recommends pumping \$1.7 billion into Gateway Cities, such as Lowell, to help spur economic development.

The report was scheduled to be released at a breakfast hosted by the Gateway Cities Legislative Caucus in Boston, and calls for the investment to be made over the next decade to help the former industrial cities attract new employers, jobs and economic power.

Unlike Boston, which saw steady investment through the real-estate downturn that began in 2007 and is now one of the strongest construction markets in the nation, Gateway Cities have seen new development plummet over the past four years.

Gateway Cities are defined as cities with populations greater than 35,000 but less than 250,000 and median household incomes and rates of college education below the state average. They are eligible for state grants and support for economic and community development. There are 24 cities currently eligible for the program, including, Lawrence, Worcester, Methuen, Springfield and Fitchburg.

The proposed investment could stimulate \$3.4 billion in new development in these cities and generate a total reinvestment in Gateway Cities approaching \$7 billion, according to the report, which was authored by MassINC's Gateway Cities Innovative Institution. Economic impact analyses suggest this would support approximately 800,000 jobs.

While specific recommendations are offered, the report is also designed to encourage dialogue on ways to help these cities.

"There is tremendous upside for everyone in the successful redevelopment of Gateway Cities, but it starts with an understanding of the very real market hurdles that need to be overcome before private investors can put their capital to work in these communities," said state Rep. Antonio Cabral, D-New Bedford, who co-chairs the Gateway Cities Legislative Caucus.

In Lowell, the revitalization began 30 years ago with the creation of Lowell National Historical Park, when city leaders began realizing they needed to embrace, not erase the city's history as the birthplace of the Industrial Revolution.

In the last dozen years, the city has seen a transformation and now is home to:

- * 190 active artist live/work spaces;
- * 250 active artist studios;
- * 10 theater or performance spaces;

- * 16 museums or galleries;

- * Five rehearsal or recording studios.

It is also home to the Lowell Summer Music Series and the 25-year-old Lowell Folk Festival.

Since 2000, 1,500 new housing units have been built, 94 are under construction now, 750 have been permitted, and 157 are in the permitting process. The amount of vacant space renovated and reborn has hit 2.6 million square feet, with another 750,000 square feet currently under construction or permitted.

While the state is supporting several major redevelopment projects, including Lowell's Hamilton Canal Project and Worcester's City Square, these projects have struggled to unfold due to the limitations of the state's existing programs, according to MassINC.

A program designed specifically to ensure that large investments in the state's Gateway Cities catalyze private reinvestment would provide much stronger return on taxpayer dollars, according to the report.

As traditional gateways to the middle class, these cities are home to immigrants, young people and small businesses.

These mill cities are prime locations for development, with access to interstate highways, airports, deep-water ports, and freight and regional passenger rail service, as well as walkable downtowns, river fronts, parks and historic and architecturally distinct buildings.

"Places in the Sunbelt are trying to recreate seemingly historic communities, but we have the authentic thing here in Massachusetts," said Lowell Assistant City Manager Adam Baacke, who is head of the city's Planning and Development Department.

Follow Chris Camire on Twitter @camirereports.

Westford assisted-living facility plans June opening

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

WESTFORD -- Officials with Bridges by Epoch, an assisted-living facility under construction at 108 Littleton Road, announced a welcome center has opened at the site to provide information for prospective residents.

The new center, expected to open in June, is a joint development between National Development of Newton and Epoch Senior Living of Waltham. The two entities previously teamed up to build assisted-living centers in Hingham and Wellesley.

Officials said in a press release that the assisted-living center has reached the midpoint of construction, and that work is under way on interior finishes.

Bridges by Epoch, which is being built over six acres, will comprise 48 apartments with suite floor plans. It will emphasize an approach to residential memory-care services.

In a statement, Epoch CEO Laurence Gerber said the company is incorporating more than a decade of experience operating senior living and memory-care programs.

"We're excited to expand our Bridges program in Westford, where the community is growing and thriving with new development," he said. "There is a great need for specialized memory-care housing and services throughout the region as the number of individuals with Alzheimer's and dementia grows."

Epoch operates 15 senior living communities in Rhode Island and Massachusetts.

The Westford site was designed by JSA Architects of Portsmouth, N.H. The general contractor is Cranshaw Construction of Newton.

UMass Lowell announces partnership with U.S. Army

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

LOWELL -- Better performing parachutes. Flame-retardant camouflage wear. Easier ways to feed troops on the move. UMass Lowell and the U.S. Army announced Thursday they are joining forces to work on these projects and more to enhance military members' safety.

Named HEROES - Harnessing Emerging Research Opportunities to Empower Soldiers - the new initiative teams scientists from the U.S. Army Natick Soldier Research, Development and Engineering Center, known locally as Natick Labs, with UMass Lowell faculty and student researchers. The project's goals include developing lighter, stronger and more protective outerwear and equipment and portable energy sources and food for troops.

The partnership was announced today at an event at UMass Lowell with speakers including U.S. Rep. Niki Tsongas, Lt. Gov. Timothy Murray, UMass Lowell Chancellor Marty Meehan, Natick Soldier Systems Center Director Jack Obusek, UMass President Robert Caret and 1st Sgt. Brian Gemmill, a Natick Labs employee and a veteran of service in Iraq and Afghanistan.

The collaboration will include advancing the design of personal protective equipment such as the body armor for women developed by Natick Labs and the Army's Program Executive Office-Solider that was named one of Time magazine's 25 best inventions of 2012. The leader in promoting troops' safety, Natick Labs includes design, synthesis, engineering and testing laboratories and nanofabrication facilities. UMass Lowell faculty and student researchers in fields including plastics engineering, mechanical engineering, physics and chemistry will provide their expertise to the HEROES collaboration.

"HEROES will bring the vast expertise and resources of the U.S. Army and UMass Lowell to bear on life-or-death issues faced by our military personnel every day around the world. Through this joint mission, our top-notch researchers will help keep our armed forces safe, mobile and comfortable as they fulfill their missions. The initiative will also allow our students to apply what they are learning at UMass Lowell to real-world situations of great importance," Meehan said.

"HEROES will result in the development of new technologies and new thinking about ways to provide cutting-edge capabilities to our soldiers. The collaboration is a testament to the great value the Army places on our being located in Massachusetts and takes our partnership with UMass Lowell to a new level. As a former soldier and father of a soldier, I am grateful to be able to tap into the ideas of the best and brightest the Commonwealth has to offer and turn those ideas into reality for soldiers," Obusek said.

For years, Massachusetts has been investing in and marshaling some of the best technological minds and resources in the world, leveraging the highly skilled workforce, military tradition and world-renowned companies and educational institutions that are unique to this region, said Tsongas.

"Bringing together the pioneering defense innovations from Natick Soldier Systems Center with the

cutting-edge research and development capabilities at UMass Lowell will help ensure America's servicemen and women have equipment that is not only strong and safe but maximizes their efficiency and mobility in the field," Tsongas said. "HEROES is another example of Massachusetts' rise as one of the nation's premier technology innovation centers and will help us take the next step in developing the next generation of soldier resources, such as lightweight and gender-specific body armor, an issue for which I have strongly advocated."

The research by the partnership will take place both at UMass Lowell and at Natick Labs. HEROES' campus work space includes laboratories, offices, conference rooms and a "think tank" area outfitted with a continuous whiteboard on which researchers will brainstorm new ideas. The initiative will also benefit from UMass Lowell's new, \$80 million Mark and Elisia Saab Emerging Technologies and Innovation Center.

Leading the initiative are Natick Labs Chief Scientist Lynne Samuelson '90, who earned her Ph.D. at UMass Lowell and is an adjunct faculty member; Julie Chen, UMass Lowell's vice provost for research; and Plastics Engineering Prof. Ramaswamy Nagarajan. Through HEROES, the partners will work together to secure research funding.

"HEROES is a unique and powerful opportunity to find creative and effective solutions to improve the safety, agility and sustainability of our soldiers. I am extremely grateful to UMass Lowell for the commitment it has made in providing our Natick Labs scientists and engineers a home from which they can now collaborate on site with UMass Lowell faculty and students. I am thrilled to be able to help lead this exciting initiative and look forward to seeing what new soldier innovations HEROES can help us develop," Samuelson said.

"By bringing UMass Lowell and Natick Labs scientists and engineers together on a daily basis, we envision great creativity coupled with research grounded in real problems faced by real people. The research and development that will happen in these labs will result in benefits not just to our troops in the field but also to the companies in the region, as they commercialize the resulting new products," Chen said.

HEROES is the first project launched under a system-wide master agreement between the University of Massachusetts and Natick Labs designed to speed the formation of research and development initiatives at all five UMass campuses.

"The initiative is another example of UMass working hard to be an efficient, effective steward of resources and partnering with key institutions in the Commonwealth to develop our research enterprise and support the innovation economy," Caret said.

HEROES also bolsters the work of the Commonwealth's Military Asset and Security Strategy Task Force and the Defense Technology Initiative. The task force works to expand jobs and improve the resources, facilities and missions of the state's military installations. Meehan serves as chairman of the regional advisory board of the DTI, which was established by the Massachusetts High Technology Council.

"The Massachusetts Military Asset and Security Task Force continues to engage with our

government, public and private partners to support the state's military installations," said Murray, the task force's chairman. "HEROES is a great example of this partnership and efforts to advance innovation and research that will further protect our servicemen and women and also promote critical assets and missions here in Massachusetts."

AS&E trims 10 percent of workforce

By Dan O'Brien, dobrien@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BILLERICA -- American Science and Engineering Inc., a maker of sophisticated screening products used to detect illegal weapons and contraband at high-security areas, said it has trimmed its workforce by 10 percent due to lingering spending uncertainties in Washington.

In a conference call with The Sun on Tuesday afternoon, CEO Anthony Fabiano said the cuts amount to about 40 people. It wasn't immediately clear how many workers were based at the company's headquarters on Middlesex Turnpike.

A filing with the Securities and Exchange Commission Tuesday afternoon indicates that one of those being let go is George Peterman, senior vice president of human resources.

Fabiano said AS&E first saw business slow after the Arab Spring of 2011, then later as the government began changing its spending patterns for defense-related products.

He said the cuts were made Monday.

Congress has failed to come to an agreement on a plan to reduce the federal budget deficit. If it can't resolve legislators' differences by March 1, automatic spending cuts kick in, including \$500 billion over the next 10 years for the defense industry.

"This move wasn't due to anything concrete, but we're battering down the hatches in case things get strung out," Fabiano said, in reference to the prolonged budget negotiations. He said the move will help "protect the profitability we've enjoyed," while retaining enough production to respond to "any upside created by pent-up demand."

The company's flagship product, the Z Backscatter Van, is a commercial delivery van that has inside it a screening system that allows the van to scan the inside of other vehicles as they pass by. Since 2003, AS&E has sold 636 of them to 127 customers in 59 countries, Fabiano said.

The company sells a variety of inspection products, ranging from its Gemini parcel and baggage systems to its huge Z Portal unit, a drive-through inspection system for scanning cargo and vehicles.

On Monday, AS&E reported fiscal third-quarter earnings and revenues that were lower than in the same period a year earlier, but better than analyst forecasts.

But through the first nine months of fiscal 2013, which ends March 31, AS&E has recorded revenues of \$144 million, down from \$163.8 million through the first nine months of fiscal 2012.

Annual revenues peaked at \$278 million in fiscal 2011 before declining to \$203 million last year. They are expected to end this year at about \$200 million, according to analyst forecasts.

Fabiano said the company had already instituted other cost-saving measures, such as cutting out business-class travel, reducing lunch offerings at work sites and, in select cases, refraining from replacing workers who left the company on their own accord.

But Fabiano, who is leaving his post as chief executive after nearly a decade, said both he and the board were "despondent" over not being able to give out bonuses to employees in the past two years.

"We had developed a good program, taking care of our people, and I'm proud of it," he said. "By making this cut, we're right-sizing our business and responding to the realities of the marketplace.

"Our competitors have already made cuts. We were the last to go and we waited until after the holidays."

Shares of the company closed Tuesday at \$64.57, down 42 cents, in Nasdaq trading. The stock has traded in a range between \$46.30 and \$77.46 in the past year.

Follow Dan O'Brien on Twitter at [dobrien_thesun](#).

Upgrades on the way for Lowell trolley system

By Katie Laman, klannan@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Upgrades are on the way for the Lowell National Historical Park trolley system, thanks to \$564,400 grant from the Federal Transit Administration.

The funding is part of a \$12.5 million package announced Monday by U.S. Transportation Secretary Ray LaHood. The 29 winning projects across 20 states are meant to reduce traffic congestion and improve visitor access to national parks and protected areas.

Improvements to the Lowell National Historic Park trolleys will include tire replacement, brake rebuilding and electrical upgrades.

Federal Transit Administrator Peter Rogoff said the investments are intended to help keep parks sustainable for years to come.

"By taking cars off the road and reducing harmful emissions and pollutants in our nation's most natural and pristine settings, we're helping Americans and visitors from around the world enjoy these public lands as they were meant to be enjoyed," he said.

For more on this story, see Wednesday's Sun or visit <http://www.lowellsun.com>.

Chelmsford, Westford to create vets housing

By Grant Welker, gwelker@lowellsun.com Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- The town will build eight new housing units for veterans, and Westford will create five, thanks to funding from both communities, the state Department of Housing and Community Development and other grants.

"It will be an amazing opportunity for both communities to come together and support our troops," said David Hedison, director of the Chelmsford Housing Authority, whose nonprofit arm, known as CHOICE, administers housing funds across the area.

The projects are both fully permitted, with construction expected to start this spring and be completed within about a year.

Westford has given \$400,000 from its Community Preservation Committee, which uses surcharges on local property-tax bills, and \$115,000 from its Affordable Housing Trust. The five Westford units, both one- and two-bedroom, will be built on Carlisle Road by the intersection with Acton Road, by renovating an existing building, the former Tara Hall.

Chelmsford's eight units will be built in a single building on a vacant lot at 9 Manahan St., off Chelmsford Street, west of the Kohl's plaza. Each unit will have a stove, private bathroom and living room, and the units will share a common kitchen. The town of Chelmsford contributed \$408,000 to the project cost through Community Preservation Act funds.

At least 10 percent of Preservation Act funds must be spent on housing, and the veterans homes will help Chelmsford reach that threshold, Hedison said. It will not take any funds away from open-space or historic preservation projects.

Other funding came from the state Department of Housing and Community Development, which contributed \$1.7 million, and TD Bank, which gave a \$100,000 grant.

Some additional state funds were also secured by designating the housing units as drug-, alcohol- and smoke-free.

The need for veteran housing in both towns is great, according to the Housing Authority and veterans agents.

Options for veterans in need of affordable housing who can't qualify for senior housing are "extremely limited," the authority said in an announcement of the program.

Approximately 4,500 veterans live in Chelmsford and Westford, a number expected to grow as more troops return from service in the coming years.

There is currently a wait of one to two years for a veteran with a local preference for subsidized

housing, and a wait of three to five years for other veterans.

Westford's veterans services office is able to offer financial assistance for returning veterans seeking housing but because house prices are limited and costly in town, sometimes veterans have to move out of town, said Terry Stader, the town's veterans agent.

"It's just tough," he said. "It's tough for them."

Follow Grant Welker at [Twitter.com/SunGrantWelker](https://twitter.com/SunGrantWelker).

I-495 traffic lights for Chelmsford

By Grant Welker, gwelker@lowellsun.com Lowell Sun

Updated:

LowellSun.com

CHELMSFORD -- Traffic lights will soon be added to Interstate 495 interchanges on North Road and Chelmsford Street, initiated by the state Department of Transportation after a corridor study done along the highway.

There isn't yet a timetable for when the lights will be installed, according to the town. Signals will be added at each of two sets of off- and on-ramps on Chelmsford Street (Exit 34), and signals at off-ramps onto North Road (Exit 33). Exit 33 is only from east I-495 lanes.

"The traffic signals will certainly help," Town Manager Paul Cohen said. "It's a welcome project."

The lights are being funded by the state. The Chelmsford Street work, which will also include new left-turn lanes, is expected to cost \$1.2 million, Cohen said. The North Road signal will cost \$328,000.

Chelmsford has also been approved for a planning grant from the Northern Middlesex Council of Governments, the area's planning agency. Cohen announced the traffic lights and planning grant approval at the Feb. 11 Board of Selectmen meeting.

The grant, valued at more than \$10,000, will pay for a study to look at a broad range of issues in the Vinal Square area, including parking, bicycle and pedestrian access and amenities, land use, zoning and economic development, said Evan Belansky, the town's community-development coordinator.

A study of the town's historical and cultural assets released in December recommended the town look into achieving a National Register of Historic Places designation for the Vinal Square/North Chelmsford area. The upcoming study may help the town in that goal but will not necessarily provide certainty on whether the town would qualify for the designation, Belansky said.

The town will soon appoint a seven-member committee to oversee the planning process. It is expected to start in March and finish before the end of the year.

In an unrelated vote, selectmen have approved a low bid of around \$336,000 to build a salt shed at the town's new public-works building on Alpha Road. The 80-foot-by-120-foot structure should be complete around the time work is finished on the main building, which is part of a \$13 million project.

The existing salt shed on Swain Road will remain, allowing the town to increase its capacity to treat roads during the winter, Cohen said.

Follow Grant Welker at [Twitter.com/SunGrantWelker](https://twitter.com/SunGrantWelker).

Several Lowell connections among Accelerator winners

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

LAWRENCE -- Several of Monday night's winners in the Merrimack Valley Sandbox's Accelerator Awards Celebration have Lowell connections.

Five startups split \$25,000 in prizes at the event, held at Chester's in Lawrence. Massachusetts Secretary of Housing and Economic Development Greg Bialecki gave the keynote address.

The top prize winner was 99C Manufacturing, founded by Brenna Nan Schneider. She lives in Somerville, but is former operations manager for Lowell's American MoJo, which helps mothers living under the poverty line to earn a living wage by making apparel for universities and corporations. 99C Manufacturing is a similar company, and it's looking for space in the Lowell-Lawrence region.

Lydia Sisson and Francey Slater, both of Lowell, earned a \$5,000 prize for their business, Mill City Grows, which creates urban food production sites and educates community members about how to grow their own food.

In a statement supplied by the sandbox, Mill City Grows said it would use the funds to help start an urban community farm, to grow and sell healthy produce and educate community members.

Lowell native Keo Rattana also earned \$5,000 for her business, KEO Homemade Ice Cream. The business makes vegan ice cream that is non-dairy, and is gluten- and lactose-free.

And finally, Sopheak Sam and Ricky Orng, both of Lowell, earned \$2,500 for their entity, FOB Lifestyle & Apparel, an urban alternative street-apparel brand inspired by immigrant and identity.

The so-called Winter Accelerator was a 12-week program that helped 13 early-stage entrepreneurs move their businesses forward.

The Merrimack Valley Sandbox is an initiative that aims to strengthen entrepreneurship and leadership in the region. It was created by the Deshpande Foundation, which was formed to support organizations that build leaders and entrepreneurs and catalyze innovative thinking.

This spring, the Sandbox will continue helping entrepreneurs succeed through its 2013 Sandbox Spring Pitch Contest Series, which will be followed by a Summer Accelerator.

Study: Transit funding shifts job growth into gear

By Evan Lips, elips@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- It could be a streetcar system that whisks riders from the Gallagher Terminal to downtown shops and lofts in a matter of minutes.

It could also be a bus service that doesn't leave evening commuters out of luck.

On Tuesday, a panel of local transportation and real-estate leaders gathered at the United Teen Equality Center to discuss such ideas following the release of a transit study from MassINC pointing out how a strong public-transportation system is critical to job growth in midsize Bay State cities like Lowell.

The informal talks, moderated by Sun Editor James Campanini, came the same day a coalition of businesses and civic groups descended on Beacon Hill lawmakers to back Gov. Deval Patrick's plan to raise taxes for targeted investments like beefing up regional transit systems.

MassINC Research Director Ben Forman pointed out the average Lowell resident spends roughly the same amount of annual income, 20 percent, on housing as he or she does on transportation.

Forman said the old argument about how improving regional transit authorities does not equate to solid investments "no longer checks out," adding that the MassINC study proves that more money equals more riders.

Under Patrick's tax proposal the Massachusetts Department of Transportation would pump \$100 million more annually into the state's 16 regional transit authorities. The Lowell Regional Transit Authority would see its share of state funding jump from \$2.7 million in the current fiscal year to \$7.4 million in 2014, a boost LRTA Administrator Jim Scanlan said would help a region that's been "treading water the last few years at best" when it comes to service.

Along with Scanlan, Trinity Financial President Jim Keefe and Lowell National Historical Park Assistant Superintendent Peter Aucella also sat on the panel and talked about the benefits they've seen in other cities that have introduced streetcars.

Aucella pointed out that more than 30 American cities have started reinstating streetcar service after learning from public focus groups that more and more people are averse to the idea of traveling by bus. Keefe, responding to Forman's research on how major cities like London have taken steps to rebrand the notion of riding city buses, added that his four sons are used to public transportation.

"Unlike me, who was infatuated with cars when I was growing up," he pointed out.

Scanlan said a major step would be simply keeping bus lines extending into the suburbs open later. Currently, city buses stop service at 7 p.m. on weekdays. In the suburbs, the last rides occur at 6 p.m. Cities like Worcester, Springfield and Brockton have buses that run until 9 p.m., he noted.

"Many thought we were crazy to start Burlington Mall service but now it's one of our busiest routes," he added.

In other transportation news, House Speaker Robert DeLeo has indicated a preference to address transportation financing in the next few weeks apart from the upcoming full budget debate. Transportation Secretary Richard Davey has also said raising revenue to meet the transportation goals now boils down to the "how and when," as the Democratic majority in the Statehouse holds the power when it comes to Republicans looking to block plans.

Keefe, whose Trinity Financial has a major stake in the success of Lowell's Hamilton Canal District, said officials involved "have not ruled out establishing Hamilton Canal as a special investment district."

"Charging 25 more cents per square foot is something I would do if that trolley pulls up every 10 minutes," he said. "We're prepared to bear some of the burden to make it happen."

Follow Evan Lips at [Twitter.com/evanmlips](https://twitter.com/evanmlips).

NMCOG examines Route 3 tie-ups

By Ed Hannan, Sun Correspondent Lowell Sun

Updated:

LowellSun.com

LOWELL -- Commuters from Greater Lowell and Southern New Hampshire endured backups twice a day traversing north and south on Route 3 each weekday morning and night, but those logjams waned considerably upon the addition of a third lane in each direction a decade ago.

These days, the traffic still exists, but is a bit harder to find. That is, unless you find yourself in places like Drum Hill Road, Wood Street or the Rourke Bridge. While (mostly) stop and (occasionally) go traffic hotspots exist throughout the Merrimack Valley, the high number of traffic lights, intersections and businesses along this mile or so stretch of road in Chelmsford and Lowell can be particularly frustrating at night.

Weary commuters looking to get home to see their kids and have a bite to eat after a long day at work instead find themselves backed up on Route 3 north to the Drum Hill rotary, then along Drum Hill Road, Westford Street, Wood Street and the Rourke Bridge.

What takes five minutes or so with no traffic can take nearly a half-hour to get from Route 3 across the Rourke Bridge, if you time it wrong.

And with more than 27,000 vehicles crossing the bridge each day, the end of the journey can be as frustrating as getting through Drum Hill Road and Wood Street.

There are plans to find a workable solution, spearheaded by the Northern Middlesex Council of Governments, along with traffic consultant Vanasse Hangen Brustlin of Watertown. NMCOG conducted its third in a series of five public meetings Thursday night at Clark Auditorium at Lowell General Hospital.

Thursday's meeting looked at immediate and short-term improvements that can be made along the corridor, while plans for redesigning or replacing the Rourke Bridge are being discussed.

Laura Castelli, VHB project manager, told the 40 in attendance that of the 35 intersections in the study area, seven lack traffic signals. However, even those intersections with traffic signals could see improved traffic flow through better signal timing and coordination among signals at different intersections, such as the University Avenue corridor, the School Street corridor and the Drum Hill Road corridor.

For example, the many signals along Drum Hill Road could be tied together and to the Drum Hill rotary traffic signal.

"We need to look at how much traffic is through traffic, versus stopping along Drum Hill Road," Castelli said. "That affects how signals can be coordinated."

Castelli said the study group looked at widening the Drum Hill Road/Westford Street corridor to four lanes, two in each direction, to match the proposed four-lane Rourke Bridge redesign, but the road north of the Drum Hill Road-Westford Street intersection is "very narrow. There are significant property impacts with any widening, including some residential and historic properties and shopping plazas along the roadway. At this time, we're not looking at widening that area now. We are still looking at widening the Drum Hill corridor and whether parking can be reconfigured. That would be part of coordinating signals along the corridor."

At the next public meeting, likely to take place in mid-March, Castelli said there will be discussion as to whether widening Drum Hill Road is viable.

Of the 35 intersections in the study area, 17 operate at a poor level of service, meaning the average wait time is 65 seconds or more to get through the intersection. Signal timing changes would improve nine of the 17 intersections, Castelli said. "It wouldn't look like traffic disappeared or you'd never have to wait at a stop light again, but it would be noticeably better than today."

At the final public meeting in mid-May, discussion will focus on short-term and long-term options, including the fate of the Rourke Bridge. Possible options, all of which involve expanding it from two lanes to four, include replacing the temporary bridge with a permanent structure and shifting the Pawtucket Boulevard side of the bridge to Old Ferry Road.

Report: Region's job growth lags that of state

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

BOSTON -- Greater Lowell's unemployment rate matched that of the state in January, although year-over-year job growth lagged, according to a pair of reports released this week by the Massachusetts Executive Office of labor and Workforce Development.

The non-seasonally adjusted jobless rate for the labor-market region including Lowell, Chelmsford and Billerica, was 7.4 percent in January, down from 7.7 percent in the same month a year earlier.

The state's non-seasonally adjusted jobless rate was also 7.4 percent in January, down from 7.5 percent a year earlier.

Lowell's jobless rate in January was 9 percent. Among nearby suburbs, Dracut's January jobless rate was 7.2 percent, followed by Tyngsboro (7.1 percent), Billerica (6.4 percent) Tewksbury (6.3 percent), Chelmsford (6.1 percent) and Westford (5.7 percent).

In a separate report, the state found that total employment in the region was 47,200 in January, up 300 (0.6 percent) from the year-ago figure of 46,900. That job-growth rate trailed that of the state, which saw a year-over-year increase of 47,500 jobs (1.5 percent), to 3,233,600.

UMass Lowell engineers to assist with rail project

By Dan O'Brien, dobrien@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- A team of UMass Lowell civil engineers is looking to help improve the health of U.S. railways with the development of an automated inspection system funded by a \$1 million grant from the U.S. Department of Transportation.

The research team is led by UMass Lowell Professors Yuanchang Xie and Tzuyang Yu. Team members include UMass Lowell graduate students Jessica Wang, Tugba Arsava and Chao Zhang of Lowell, as well as researchers from Duke University, the University of Vermont, the University of Alaska Fairbanks and Penn State Altoona.

UMass Lowell's share of the funding to develop the automated inspection system is nearly \$410,000, according to Nancy Cicco, a media-relations specialist at the university. She said the project kicked off in September and is funded for two years.

According to the university the automated inspection system seeks to identify rail defects such as broken ties, missing bolts, fouled ballasts and inappropriate distance between load-bearing rails. It does so by using ground-penetrating radar, laser, geographic-information and global-positioning systems technology to evaluate the condition of tracks' steel rails, concrete ties, fastening systems and rail beds.

Researchers will also develop a companion, Web-based global-information-system program to help transit agencies visualize the collected data and make informed decisions.

Once it's ready, the inspection system will be tested in partnership with the Massachusetts Bay Transportation Authority and Metro St. Louis.

Rail-transit agencies rely heavily on visual observations to inspect tracks, according to Xie, adding that it is "time-consuming, costly and unsafe and cannot effectively identify safety hazards below the surface."

About a quarter of the nation's rail and bus assets are in marginal or poor condition, according to a 2008 report by the Federal Transit Administration.

Researchers are working with consultants from CodeRed Business Solutions of St. Louis and Pavemetrics Systems Inc. of Quebec City to develop the automated inspection system.

Follow Dan O'Brien on Twitter at [dobrien_thesun](https://twitter.com/dobrien_thesun).

Millions of dollars later, Merrimack River cleanup showing rewards

By Hiroko Sato. hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

For some Lowell residents, a rainstorm in the forecast used to mean they would see sewage backed up in their basements.

For others, the Merrimack River could become too contaminated with bacteria to swim in for days.

That's because smaller and older sewer pipes in some neighborhoods couldn't handle sudden outflow from catch basins. The rainwater surging through sewer pipes would also overwhelm the treatment plant, causing raw sewage to flow into the river.

But raw sewage floods into the river much less frequently now that the city has spent \$80 million to install new pipes that bring rainwater straight from catch basins to the river. That effort by Lowell, along with the investments other communities along the Merrimack River have made to improve their sewer systems, may be paying off, helping to keep the river cleaner than ever, according to environmental advocates.

"It looks like it's potentially making some improvements," Merrimack River Watershed Council Executive Director Caroly Shumway said of the results of the organization's river water testing.

Shumway credits the sewer projects across the region as the potential control factor.

The recently released MRWC data shows that the bacteria counts in the river between Nashua and Lowell have been declining since 2009 and 2010, depending on the location.

The Lawrence-based nonprofit agency has taken water samples monthly from different locations in the river to monitor E. coli counts against the state standard of 235 colonies per 100 milliliters of freshwater -- the level over which the Environmental Protection Agency recommends that a beach be closed. In 2008, bacteria counts exceeded the state standard at two of four Lowell sampling locations, each just once. But those figures were far in excess of the standard, showing well over 1,000 colonies per 100 ml.

In 2011, all four locations had more E. coli than allowed, and one of the sites exceeded the EPA standard twice that year. However, the counts were less than 400 colonies per 100 ml.

New Hampshire has a stricter E. coli standard of 88 colonies per 100 ml. In 2010, water samples taken from Nashua sections of the river had nearly 400 colonies per 100 ml on average in June, and more than 250 in July. But no samples exceeded the state standard in 2011.

Mark Young, executive director of Lowell Regional Wastewater Utility, said Lowell has installed 16 miles of rainwater-only sewer lines so far, and much of the work was done in late 2008 through 2009.

In old mill cities, such as Lowell, Lawrence, Haverhill, and Manchester and Nashua, N.H., both wastewater and storm water go into the same sewer pipes connected to treatment plants. The EPA has required those communities to separate storm water from regular sewer water because heavy rainfall causes sewage volume to exceed treatment plants' capacities, causing wastewater to flow into rivers untreated.

In Lowell, a quarter-inch rainfall used to guarantee an overflow, Young said.

"We cut the number by well over half," Young said of the inch count.

Nashua has earmarked \$72.29 million to deal with its combined-sewer-overflow problems, and about half of the project was completed by the end of 2009, including the construction of a second wastewater treatment facility to handle increased sewage volume during heavy rainfall.

Tyngsboro does not have a combined-sewer system, but what floats down from Nashua influences the quality of the river water, according to Allen Curseaden, the town's sewer superintendent.

In August and September 2008, water samples that MRWC took from Tyngsboro sections of the river contained more than 400 colonies and nearly 1,000 colonies per 100 ml, respectively. But no samples exceeded the EPA standard in 2009, and E. coli counts have since remained between zero and 50 colonies per 100 ml except for occasional upticks, including June 2010 and July 2011, when the bacterial levels hovered around the EPA standard.

In the meantime, the E. coli counts in sections of the Merrimack in Lawrence and Haverhill have risen in recent years, logging between 400 and 600 colonies 100 ml during some summer months last year.

Bob Ward, deputy director of the Haverhill Department of Public Works, said the city spent about \$20 million before the end of 2006 to increase the capacity of its existing sewer treatment plant so that less sewage would overflow during heavy rainfalls. The city submitted its longer-range plan to deal with the combined-sewer overflow with the EPA in 2011, but has not acted on it yet.

The second phase would again involve the expansion of the treatment facility's capacity. The city will not install rainwater-only sewer lines after weighing the cost and the environmental benefits the money could buy, Ward said.

Lowell's Young said tributary waterways into which E. coli streams from septic systems also contribute to the bacteria counts in the Merrimack River.

Bird feces, which contains E. coli, also push up bacteria readings in certain locations where people feed birds, such as near the Bellegarde Boathouse in Lowell, Shumway said.

EPA has a plan to address those contributing factors, including dog waste in people's backyards, to help keep rivers clean, she said.

To see the E. coli and other data, visit <http://www.merrimack.org>.

NMCOG to meet on bridge study

By Lyle Moran, lmoran@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- The Northern Middlesex Council of Governments will hold another meeting as part of its Rourke Bridge study Thursday at 6:30 p.m. in the Clark Auditorium at Lowell General Hospital.

The meeting will present the results of the preferred bridge-alignments analysis, which investigated how each alignment alternative for a new bridge would affect vehicular, pedestrian and bicycle mobility.

It also examined the impact on property, resources and the environment each alignment would have, and identified potential obstacles to construction.

NMCOG is seeking the public's feedback on the results of the analysis.

The Rourke Bridge project is analyzing existing and future traffic conditions within the study area and examining the feasibility of replacing the temporary bridge with a permanent structure.

The study is known as the "Rourke Bridge, Wood Street, Westford Street and Drum Hill Road Corridor Study and Feasibility Analysis project."

Pepperell to move forward with new housing production plan

By Emily Royalty, eroyalty@nashobapub.com Lowell Sun

Updated:

LowellSun.com

PEPPERELL -- The Affordable Housing Committee is moving forward with establishing a new housing-production plan to become certified by the state Department of Housing and Community Development.

The HPP is part of Chapter 40B regulations. The regulation was established as a strategy for planning and developing more affordable housing. After the town creates an HPP, it goes to the DHCD to be approved.

From there, the department can grant a certificate of compliance if the town builds affordable housing within its approved plan each year.

If the town meets their production goals, they can become certified for one year. Once a plan is approved and the town is certified, the Zoning Board of Appeals has the right to deny a Comprehensive Permit application for Chapter 40B housing; the denial of the application is considered "consistent with local needs" under Mass General Law.

Establishing the housing would also encourage growth within the community, according to the committee.

"(Right now,) we aren't attracting the 20- to 40-year-olds at all," said Town Administrator John Moak.

The HPP expires every five years. Pepperell's last HPP expired in November 2011. Under Mass General Law, Chapter 40B housing could be established and potentially supersede the town's zoning.

The committee heard from representatives from the DHCD and the Massachusetts Housing Partnership about establishing a new HPP at their Wednesday night meeting.

Phillip DeMartino, DHCD technical-assistance program coordinator, said plans must contain a comprehensive housing-needs assessment, affordable-housing goals and implementation strategies. The needs assessment will include Census-data analysis, a study of demographics and an evaluation of current housing.

The implementation can be trickier, said Susan Connelly, director of community housing initiatives at the Mass Housing Partnership.

"Lots of communities have plans but haven't ID'ed any zoning that supports that plan," she said.

Depending on the assessment and plans, implementation strategies might include zoning changes or the adoption of a Community Preservation Act.

Although the HPP will not need to go before Town Meeting at any point, any eventual zoning changes or land purchases during the implementation stage would need to be voted upon by the town.

Committee member Al Patenaude expressed concerns over the best way to educate residents who might not be receptive. Patenaude said that while he was a strong supporter of affordable housing and wanted to see it expand, others in town might not feel the same way.

"There are people that feel that additional housing, equals additional children, equals additional taxes," he said.

Connelly said that it was crucial that the plan is as comprehensive as possible, and that "It reflects the character and desires of the community. All of that becomes so, so important."

Downtown Lowell bridge replacement project delayed 2-3 months

The Lowell Sun Lowell Sun

Updated:

LowellSun.com

By Christopher Scott

cscott@lowellsun.com

LOWELL -- A reconstruction project on a key downtown bridge has been delayed for at least two months while a utility company designs a support system for an important electrical line that passes beneath the span.

Hardly what local business owners, and others, wanted to hear as the project over the Eastern Canal, just outside busy Kearney Square, has slowed traffic and cluttered East Merrimack Street with concrete barriers, chain-link fence, and construction equipment and trailers.

"It certainly is frustrating," said Steven Ramirez, who owns the Blue Taleh Restaurant.

There probably isn't a local business more impacted by the project than the Blue Taleh: its front door practically opens into construction zone.

"Across the country and across the state, some of these bridge projects have been fast-tracked because they're in key locations," Ramirez added. "It's too bad that couldn't happen here."

Ramirez said the project has impacted his business, but not as bad as he initially feared. When work is underway, workers end their day at 3:30 p.m., so there's less impact on the dinner crowd.

Adam Baacke, the city's top planning and development official, said in an email: "The City is disappointed by the delay in the project, but for better or worse, there is a logical explanation for it."

According to Baacke, Division of Planning and Development director/assistant city manager, the project was on schedule until the contractor ran into an issue with the electrical line, which is a major electrical service for a large section of Downtown and cannot be temporarily impacted by the project. Because the line rests on an actual bridge abutment, which is supposed to be demolished and rebuilt, the project had to stop while National Grid designs an alternate support system to protect the line.

"As a result, Enel informed us that they believe this will result in a 2-3 month delay and the project will not be complete by September as originally anticipated," Baacke wrote in the email. "This is unfortunate and we can appreciate that the expanded duration is not a positive development for the impacted parties in the area. However, it appears that the delay is the result of a true unanticipated circumstance, as sometimes arises with infrastructure construction in a historic city."

Several attempts to reach by telephone and email National Grid and Enel Green Power North America, the firm that owns the bridge, were not successful.

"I can assure you that Enel, as the party paying for this work, has little interest in seeing the project delayed and a very real financial incentive to complete it as soon as possible without needing pressure

from the city or business leaders," Baacke wrote. "We definitely will continue to monitor the project and make sure unnecessary delays are avoided."

The project didn't exactly get off on the right foot.

Late last year, when Enel proposed limiting traffic on the canal bridge to one way while the bridge is rebuilt, local business owners, community activists and city officials rose in opposition, noting such a restriction would seriously impact their operations.

Just before Thanksgiving, Enel responded with a new plan that will maintain two-way traffic throughout the duration of the project, though the project's timeline would be extended by about five weeks to make that possible.

Once the traffic issue was resolved, construction began in mid-March. The south sidewalk was demolished, and the east-bound travel lane was also removed. As agreed to, two-way traffic was maintained. Initially, the entire south side of the span was scheduled to be completed by May. The entire project was scheduled to be completed in September.

Ramirez said he hasn't seen workers on the bridge for about three weeks. All he sees daily is a gaping hole where the bridge used to be.

Follow Scott on Twitter @cscottlowellsun

Town Meeting vote helps Tyngsboro Center take shape

By Sarah Favot, sfavot@lowellsun.com Lowell Sun

Updated:

LowellSun.com

TYNGSBORO -- Town Meeting made a commitment Tuesday night to preserving the town's history and revitalizing its center with the purchase of a building, the gateway into the center of town, that has been an eyesore for several years.

Town Meeting appropriated \$570,000 to purchase and renovate the First Parish Meeting House, at 214 Middlesex Road. Built in 1755, the former Unitarian Church has deteriorated with weather and age. Town Meeting also appropriated \$76,000 to restore the Adams Barn, a dilapidated structure built in the 1800's that sits behind the Meeting House.

"I see a wedding in the church, cocktails at the barn and the reception in the (Old) Town Hall," said resident Cheryl Bradley to applause from many of the 242 voters at Town Meeting.

After being closed since 1998, renovations are under way at the Old Town Hall, down the street from the Meeting House.

"We haven't got a town center. We've got a mess," said Warren Allgrove, who chairs the Historical Commission.

"With this Meeting House and the barn we will finally have a Colonial, New England town center that we can finally be proud of," he added.

Selectman Robert Jackson advocated strongly for the purchase of the Meeting House.

"Every time I pass that building I think it would sure be nice if we could restore that building," Jackson said. Numerous attempts have been made to help the property owner repaint the chipped white paint and other improvements to the exterior.

"We've exhausted possibilities. We as a community right now have an opportunity to address this issue...or it will continue to deteriorate in our town center," he added.

A purchase price of \$289,000 was negotiated with owner Rev. Donald MacDonald. The assessed value is close to \$400,000, according to town property records.

Town Meeting authorized the selectmen to borrow up to \$470,000 for the purchase and renovation and \$100,000 will come from Community Preservation Act funds, a surcharge on property taxes for historical, open-space and affordable-housing uses.

A couple residents questioned why the town was investing in another historic building when the former Winslow School and Littlefield Library are historic buildings that have yet to be restored.

Town Meeting approved a \$50,000 expenditure to study uses for the town's buildings, Selectman Karyn Puleo pointed out.

The Adams Barn restoration was more contentious, with 102 voting in favor of funding \$76,000 from CPA monies to restore it and 58 voting against it.

The Finance Committee did not vote in favor of the appropriation.

Chairman Rob Mullin said a previous Town Meeting had voted to tear the barn down along with the Shur-Fine Market.

"I think it is a complete eyesore," said Mullin. "I think it's the main building in the area that takes away from our town center. Adding additional money to renovate that building will not help that area. I believe it should be torn down."

The money will be used to renovate the exterior of the building and ensure it is structurally sound. The inside of the building will not be usable.

Another contentious item was an article that dealt with \$517,000 in capital expenditures.

Resident Kathleen Spaeth filed an amendment that would have tabled two capital expenditures -- \$185,000 to build a concession stand and bathrooms at Pierce Field and \$50,000 in technology for the School Department.

The amendment failed.

Several residents questioned the School Department about the concession stand.

Superintendent of Schools Don Ciampa said the School Committee made the concession stand a priority because other capital items, like HVAC systems at the Lakeview School, may be paid for by a third party through the town's Green Communities designation.

The concession stand will be used by the School and Recreation departments.

The Finance Committee did not recommend the article. Mullin said the committee did not receive information it had requested about the bid process, potential design and how the cost was calculated. He also said the committee was concerned about borrowing the total \$517,000 because the town is close to its debt limit.

Town Meeting also:

- * Approved a fiscal 2014 operating budget of \$32,616,029.
- * Appropriated \$100,000 to purchase and install playground equipment, adult exercise stations and a dog park.
- * Appropriated \$800,000 to construct four affordable-housing units at Red Pine Terrace, 186 Frost Road.
- * Approved 39 roads as public ways.

Follow Sarah Favot on Twitter @sarahfavot.

Billerica Town Meeting OKs \$1.18M for turnpike project

By Rick Sobey, rsobey@lowellsun.com Lowell Sun

Updated:

LowellSun.com

BILLERICA -- The final night of Town Meeting brought slow and arduous projects back to the forefront.

On night five, representatives voted to borrow \$1.18 million for the engineering and design of the Middlesex Turnpike Phase III project and to kick-start the Yankee Doodle Bike Path committee.

If Town Meeting did not support the Middlesex Turnpike article, then Billerica would have lost out on \$22 million in construction funds from the state.

"It's critical that we don't miss out on the opportunity to get the \$22 million," said Town Manager John Curran. "Borrowing \$1.18 million makes it worth it."

The Middlesex Turnpike project also includes Burlington and Bedford. Burlington completed the first phase and Bedford is almost done with phase two.

The third phase in Billerica and Bedford would widen the turnpike from Manning Road to the Shawsheen River and add sidewalks to make it more "accessible and marketable," according to selectmen Chairman David Gagliardi.

"Middlesex Turnpike is a major source of revenue for the town, and this project will help with traffic flow and expand interest in economic development," Curran said.

"There's a lot of potential down there, and this will help us get to that end."

In addition, Town Meeting voted to form a committee that would develop a plan to complete the Yankee Doodle Bike Path from the Billerica/Bedford town line to Billerica Memorial High School.

"I'm thrilled that Town Meeting has sent a message to the Statehouse that they are ready to move forward to get this bike path done," said state Rep. Marc Lombardo, R-Billerica. "We'll see what we can do to get some funding."

The 2.5-mile long bike path could cost about \$2.5 million, according to surrounding towns that have bike paths. However, an engineering firm estimated \$4 million to \$6 million for the path.

The committee would eventually bring the plan in front of Town Meeting members for approval.

Town Meeting also approved a temporary moratorium on medical marijuana treatment centers.

This allows time for Billerica to figure out zoning regulations for the facilities, according to D. Anthony Fields, Billerica's director of planning.

Billerica will need to discuss whether it will only allow the facilities in a specific part of town and how far the facilities should be from schools and social gathering places, he said.

The moratorium, which several area towns also placed on their Town Meeting warrants, would not allow for the "use of land or structures for purposes of cultivation, distribution, possession and use of marijuana for medical purposes and/or the operation of a medical marijuana treatment center" until June 30, 2014, unless repealed earlier by Town Meeting.

Follow Rick Sobey on Twitter @rsobeyLSun.

Tax break spurs Thermo Fisher's \$18 million relocation to Tewksbury industrial park

By John Laidler

Globe Correspondent / October 20, 2011

A scientific instruments firm plans to invest \$18.2 million to relocate part of its operations to a Tewksbury industrial park adjacent to Interstate 495.

Thermo Fisher Scientific on Oct. 12 closed on the purchase of a vacant 156,000-square-foot building in the Ames Pond Corporate Park off Route 133. The Waltham-based firm plans to renovate the building to serve as the new consolidated site of its portable analytical instruments business, now housed at two buildings in Wilmington and one in Billerica.

The project, at 2 Radcliffe Road, is being welcomed by Tewksbury, which has agreed to provide Thermo Fisher a tax break for its investment.

"We're very supportive of it," said Steven Sadwick, the town's community development director. He said it means the relocation of 400 jobs to Tewksbury, with a promise by the company to add another 100 jobs over five years.

"The town sees that as a big benefit. It will help with our tax base and those employees will frequent the restaurants and hotels that are up in that area," he said.

Tewksbury was able to offer the tax incentive because the town earned state designation - with Andover in September 2010 - as an economic target area.

A Special Town Meeting Oct. 4 authorized the town to enter into the "tax increment financing" agreement with Thermo Fisher by approving the development as a certified project in the Radcliffe Road Economic Opportunity Area, the designation selectmen plan to give the site next month.

Under the 15-year agreement, Thermo Fisher would be exempted in the first year from taxes on 50 percent of the increased value of the property resulting from its investment. That exemption would be reduced by 5 percent per year until reaching 5 percent in the 10th year, and remain at that level through the 15th year, according to Sadwick.

The tax agreement still requires the approval of the state's Economic Assistance Coordinating Council, which will take it up at its Dec. 21 meeting. Should the council approve the agreement, it could also grant Thermo Fisher up to a 10 percent state investment tax credit.

Peter Milano, senior regional director for the Massachusetts Office of Business Development, said it was likely the council would approve the property tax agreement "because that is the town's wishes." He said it was premature to speculate on whether it would agree to the state tax credit.

Milano observed, though, of Thermo Fisher: "It's a manufacturing entity which has been very well received by this board, and it's been an industry we've supported. While they are not a certified life sciences entity, they support the life sciences industry, which has been of great interest to us."

Sadwick said the property tax incentive will save Thermo Fisher an estimated \$484,000 over 15 years. But he said the town in that time will reap an estimated \$2.1 million in added taxes as a result of the development, along with about \$73,000 in permit fees.

The building purchased was formerly part of a three-building complex that housed Avid until that company relocated its Tewksbury operations to Burlington two years ago, according to Sadwick. All three buildings have been vacant since. In addition to I-495, the site abuts Ames Pond and Lodge at Ames Pond, a new apartment development.

Thermo Fisher acquired its building and the land beneath it for \$8.6 million. It plans to spend \$7.3 million on the construction, and another \$2.2 million on furniture, equipment, and other costs, according to company spokesman Ron O'Brien.

Sadwick said the firm's plan is a permitted use of the site, which is zoned for office research. As a result, it does not need a site plan special permit, but would require one if it sought to expand later.

Thermo Fisher plans to begin construction as soon as its building permits are in hand. It expects to have moved most of its employees into the building by next spring, and have all of them in place by next fall, O'Brien said.

An \$11 billion-a-year company with about 37,000 employees worldwide, Thermo Fisher makes scientific instruments for customers ranging from pharmaceutical and biotech companies to hospitals, universities, government agencies, and clinical diagnostic labs.

The Thermo Fisher entity relocating to Tewksbury develops and manufactures portable instruments that can be used for chemical analysis in the field. O'Brien said customers range from pharmaceutical companies that use it to test incoming materials to law enforcement agencies that use it to determine whether chemicals may be dangerous to handle.

The relocation to Tewksbury offers the company a chance to bring under one roof all its employees working in the hand-held instrument business, O'Brien said, and in so doing to "reduce our footprint in the north of Boston area by three buildings.

"We have an excellent site in Tewksbury and we think it's a win-win for everybody," he said.

Planning Board chairwoman Nancy Reed called the project "a fantastic opportunity for our town" and one that fits with what Tewksbury had in mind when it sought designation as an economic target area.

"It's providing good jobs for people in the town, not to speak of tax revenue," she said. "And it's going to help the businesses that provide services in the town such as restaurants. The ripple effect is much needed."

Economic opportunity label for Freudenberg site in Lowell called boost

*By Lyle Moran, lmoran@lowellsun.com Lowell Sun
Updated:*

LowellSun.com

LOWELL -- The City Council has designated the site of the former Freudenberg Nonwovens building as an area targeted for economic growth in hopes of helping the building's owner attract commercial tenants.

In addition to declaring 110 Canal St. an "Economic Opportunity Area," the council also voted Tuesday to authorize a tax-incentive agreement with the property's owner, Trinity Financial.

City and Trinity officials sought the council's action because it allows the company to petition the state to secure a tax deduction for the costs to rehab the 55,000 square-foot property in the Hamilton Canal District downtown.

The "Abandoned Building Tax Deduction" allows parties that redevelop buildings that have been substantially vacant for at least two years to claim a state tax deduction of 10 percent of their qualified investment costs.

Adam Baacke, the city's assistant city manager, said if the state approves the abandoned building tax deduction, Trinity's costs to rehab the building will be reduced.

The savings could then be passed on to potential tenants through lower rent payments because Trinity will not need as much rent income to cover the debt and operating costs for the project, he said.

"The City and Trinity both believe that these tax benefits will enable (Trinity) to make more attractive offers to prospective tenants, including those that they are currently negotiating with than would otherwise be possible without the tax benefits," Baacke said in written statement.

Filling the Freudenberg building is the next major step for Trinity's \$800 million redevelopment of the Hamilton Canal District.

Trinity rehabbed the Freudenberg building "on-spec," or without tenants lined up. The "core and shell" rehab cost \$8.5 million.

Abby Goldenfarb, Trinity's project manager for the district, said Trinity is always supportive of taking steps, such as pursuing tax incentives, that will allow it to be more competitive when seeking tenants.

Goldenfarb said so far tenants in various industries have expressed interest in leasing space in the building. Those with interest include technology companies, as well as businesses in the retail and restaurant industries.

Trinity is hopeful to secure its first tenant for the building in the near future and others not long after, said Goldenfarb.

The work to transform the building's flaky orange exterior into a sharp, three-shades-of-tan scheme reflecting the structure's concrete core is a big reason interest in the property has increased, said Goldenfarb.

"The market seems to be getting stronger and the property has turned out to be an extremely attractive building," Goldenfarb said. "We are feeling good about the prospects for the building."

The rehab of the exterior of the building was completed months ago and the interior, including the lobby, should be complete by mid-June, said Goldenfarb. Trinity plans to host a brokerage event at the site June 13.

City Councilor John Leahy, a member of the council's economic development subcommittee, said he supported the two proposals before the council regarding 110 Canal St. to help move the Hamilton Canal project forward.

"If there are tax incentives to assist the developer in finishing the project and get tenants for a building, we should help the developer get them," Leahy said. "We just want to keep the whole effort moving along."

The tax-incentive agreement the council approved with Trinity was a tax-increment financing plan agreement, known as a TIF. Such agreements typically allow for a local-option property-tax abatement on all or part of the increased property value resulting from improvements made to eligible properties.

But Baacke said the state deduction for abandoned properties does not require a local property-tax abatement also be given.

Other companies in the city that have taken advantage of the abandoned building tax deduction are Nobis Engineering and Cristek Interconnects Inc.

There have also been companies in other local communities who benefited from the state tax deduction program in recent years. They include Thermo Fisher Scientific Inc. in Tewksbury, Keurig Inc. in Burlington and FIBA Technologies in Littleton, a global manufacturer of high-pressure gas containment equipment.

Lowell officials have also helped different sites in the city become eligible for a wide variety of state benefits in hopes of bolstering economic development.

One example was the council's 2008 vote to put the former Prince Macaroni factory on a state list of preferred-development sites.

Follow Moran on Twitter @lylemoran.

State gives ex-Steele site in Lowell \$1.5M toward development

By Hiroko Sato, hsato@lowellsun.com Lowell Sun

Updated:

LowellSun.com

LOWELL -- Excavators will soon start digging up earth at River's Edge to create more roads and homes after the state announced \$1.5 million in new funding for the 180-unit affordable-housing project off Gorham Street near the Chelmsford line.

With 30 additional units to be created, there will be light at the end of tunnel, say community leaders who have labored over the years to transform the former site of the crime-infested Julian D. Steele public housing project into the peaceful neighborhood that the residents have already realized.

"It's huge," said James Cook, executive director of The Lowell Plan and Lowell Development & Financial Corporation, who has been involved in the project since its inception in 1999. "This gets us very close to the finish line."

From local banks to city leaders, the project has had many people working hard on it, said Sen. Eileen Donoghue, a Lowell Democrat.

"It's a long labor of love," Donoghue said.

Gov. Deval Patrick's office announced Wednesday it will provide up to \$1.5 million in funding for the fourth phase of River's Edge development. That adds to the \$1.5 million the state Department of Housing and Community Development committed in 2008, and another \$1.5 million from a MassWorks Infrastructure Program grant through the Executive Office of Housing and Economic Development in 2011, among other financial assistance for the project over the years.

Creating new housing is part of the strategic investment in infrastructure, education and innovation, Patrick's office said.

The news couldn't have come at a better time for the city, which is trying to help more residents become homeowners amid tight credit while the real-estate market has begun to pick up.

River's Edge, a public project with private investments involving local banks, came out of the initiative to tear down the blighted Julian D. Steele public housing complex and replace it with affordable homes for ownership.

Under the management of Residents First Development Corp., there are 102 units built already, including 44 single-family homes and 29 duplexes.

Construction began in 2006, but the project slowed over the past several years due to the economic downturn.

Units didn't sell as quickly in recent years as those involved in the development had hoped, making it difficult to access financing, City Manager Bernie Lynch said.

He said the latest state funding will give the project a much-needed boost, allowing it to move full steam ahead, Lynch said, who thanked Patrick, Donoghue and Secretary of Housing and Economic Development Greg Bialecki for "their commitment to the project."

"They did a great job," he added.

Donoghue, who served as Lowell's mayor in 1999, also thanked Patrick and Bialecki for their support for the project. She said the 244 units at Julian D. Steele, which was designed to house soldiers returning from World War II, were too small and inadequate for any family to live in. The state was spending millions of dollars each year just to help keep the dilapidated complex up and running, and renovating the entire complex would have been "enormously expensive."

Cook said razing the complex and building River's Edge was "an alternative that everybody got behind."

The idea to redevelop a public housing site for homeownership development was uncharted territory in Massachusetts, requiring legislative approval for the conversion in site use.

Despite the recent sluggish economy, the River's Edge has still found buyers, Donoghue said.

"This has proven to be great for the neighborhood and great for the city" as well as for those looking to become homeowners, Donoghue said.

Diane Silva, president and treasurer of Residents First Development Corp., said it hopes to start the construction of roadways for the additional 30 units within the next 30 days. Home construction will follow the completion of the roadways later this year, and the timing will depend on the weather, she said.

Silva expects the additional units -- which include single-family homes and duplexes totaling 30 units in 21 structures -- will be put on the market next spring. Prices for the homes have not been set yet, Silva said, adding that she is optimistic that the new units will sell.

Cook said the replacements for the torn-down Julian D. Steele units were created across the city to make them part of different neighborhoods rather than concentrating them in one location.

"Our comprehensive housing strategy for the commonwealth includes creating new housing at every level, including affordable housing that is accessible to a broad range of residents," Aaron Gornstein, undersecretary of Housing and Community Development, said in a press release. "River's Edge is a great opportunity for Lowell to create home-buying options through new, quality housing."

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