

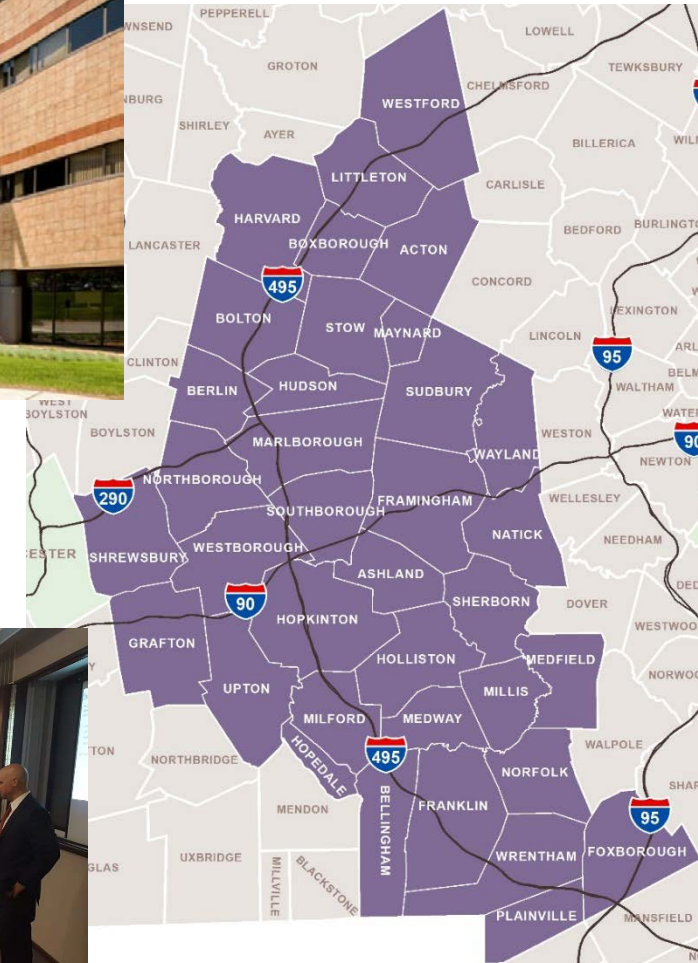
Overview: Proposed 2022-2027 Strategic Plan



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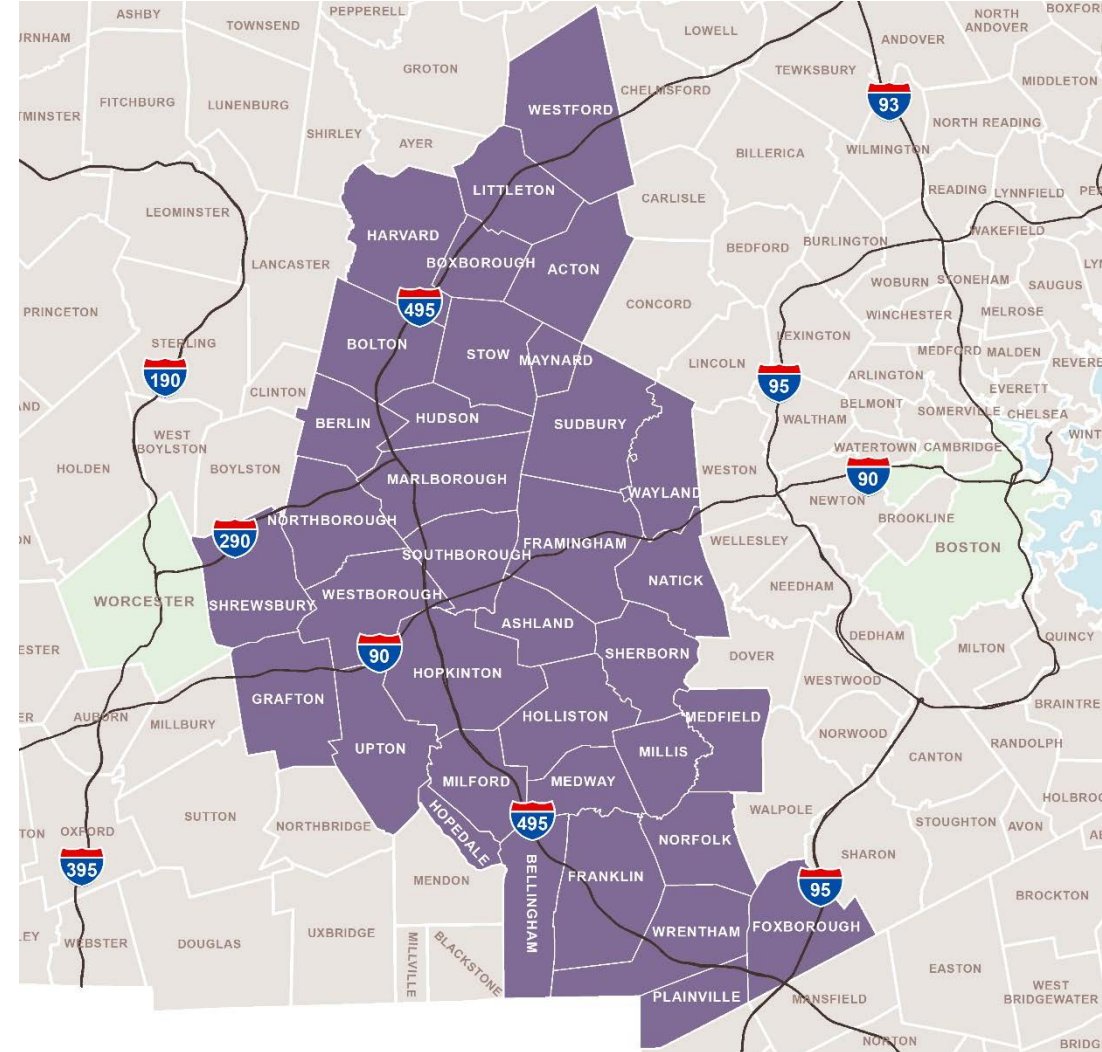
Background: The 495/MetroWest Partnership

- The 495/MetroWest Partnership, through a unique public-private collaboration with businesses, municipalities, and other stakeholders, is the regional leader for creating an environment that prepares for and cultivates sustainable growth. We accomplish this by coordinating, educating, and advocating for solutions to regional constraints and limited natural resources.
- The organization is different things to different audiences; this has benefits and drawbacks.
- The Partnership has a full-time staff complement of two, and is led by a large volunteer Board of Directors.
- The organization has been in operation since 2003. The Partnership's most recent Strategic Plan dates to 2008.



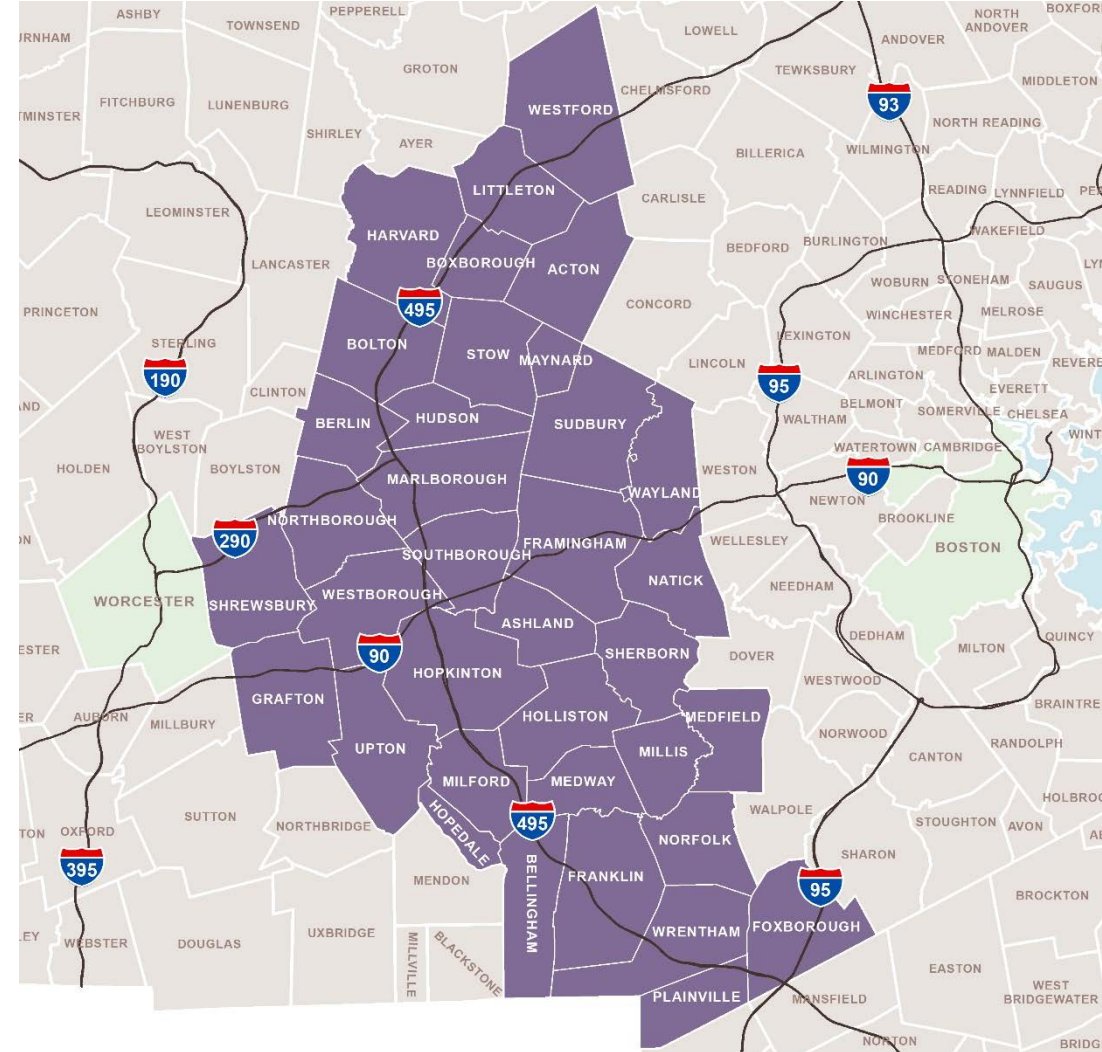
Background: The Region

- The Partnership's service area consists of 36 cities and towns located along the I-495 corridor between Routes 3 and 1, and in the MetroWest region. The organization has added 4 municipalities since its founding in 2003.
- The area is home to roughly 1 in 10 Massachusetts residents; between 1970 and 2018, its population grew 44.4%, compared to 20.1% for the state.
- The region has become more diverse, with the percentage of residents who identify as White dropping from 84% in 2010 to 73% in 2020. 2020 Census data showed an increase in 495/MetroWest residents identifying as Asian (10%), Latino (6.7%), Black (2.43%), and Multi-Racial/ Two or More Races (5.39%).
- The region has high levels of educational attainment: 59.3% of residents 25 years of age or older in the region hold a Bachelor's Degree or higher, compared with 44.9% statewide. 27.8% have attained a Graduate or Professional Degree, compared to 20.3% statewide.



Background: The Region

- The region is a technology and life sciences hub. Industry clusters with higher job concentration in the region than the state include IT and Analytics, Biopharmaceuticals, and Medical Devices.
- The region's unemployment rate has been consistently lower than the state rate since 1990. The region is a net importer of labor.
- The region's 2020 housing vacancy rate of 4.1% was far below the state's rate of 9.1%. Nearly one quarter of homeowners and 45% of renters are cost-burdened.
- The 495/MetroWest region offers a significant pricing advantage in commercial real estate as compared with the Boston and Cambridge markets. Last year's average price per square foot for Office/Flex space was \$20.24, compared to \$58.29 for Boston/Cambridge. For Bio Tech/Lab Space, 495/MetroWest saw \$18.02 compared to \$69.35 for Boston/Cambridge.



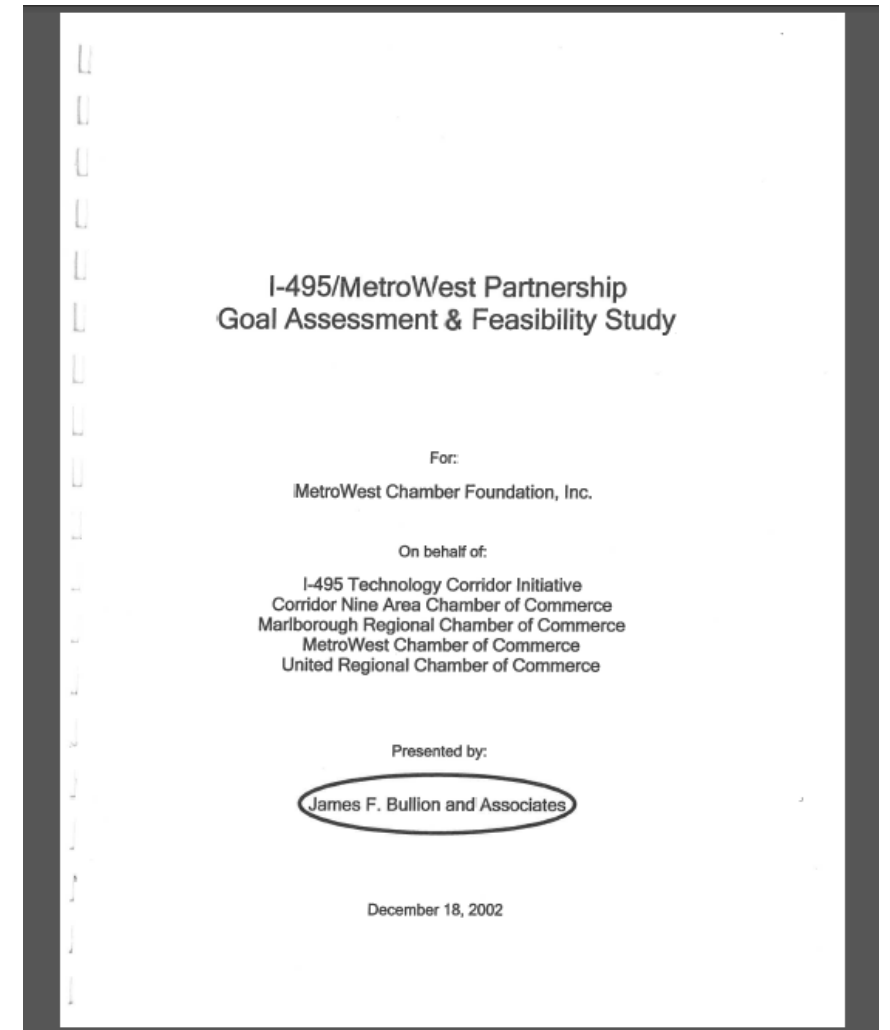
Background: Organizational History

- Transformed in the 1980s and 1990s by I-90 and I-495, the area between Boston and Worcester emerged as an economic powerhouse. Many businesses moved into the region attracted by its skilled workforce, available land, convenient transportation routes, and high quality of life.
- Despite its growth, by the early 21st Century the region had not achieved a distinct identity. The common interests of the area's business community were undefined and underrepresented. While the region's communities shared many common traits, strengths, and challenges, they were otherwise divided by jurisdictional boundaries.
- On the periphery of the Boston area but not quite Central Massachusetts, the region's communities and businesses were often "lost" between Boston and Worcester in policy and planning conversations.
- Regional leaders commissioned a feasibility study in 2002 to explore the creation of a new entity to serve the region's needs.



Background: Organizational History

- The effort begun by the 2002 feasibility study evolved in 2003 to combine three distinct entities – the 495 Technology Corridor Initiative, the I495/MetroWest Affiliated Chambers, and MetroWest Momentum – into a single organization. Its mission: to realize the full potential of the region as an engine for sustainable economic development, while enhancing the quality of life in the 495/MetroWest corridor.
- The Partnership's leadership structure was designed to convene stakeholder groups who did not often work together but who shared a common interest in the prosperity of this unique region. Board of Director composition includes representatives of key stakeholder groups. The region's state legislative delegation plays an important role as members of the Advisory Council.
- As a public-private association with wide representation, the Partnership is able to address the region's diverse and complex needs. It acts as an advocacy organization focused on economic development, transportation, housing, and water supply issues that proliferate in the 495/MetroWest corridor.



Background: Accomplishments

- Successfully branded and positioned the 495/MetroWest region as one of vital economic import; the 495/MetroWest Partnership is the only entity serving this unique combination of communities and their common interests
- Led the creation of the MetroWest Regional Transit Authority and expanded the reach of our regional transit services
- Fought successfully for the reconfiguration of I-495/I-90 interchange, scheduled to begin in 2022, as well as ongoing improvements to the I-495/I-290 interchange
- Achieved real improvements to commuter rail service through advocacy, including more frequent service during peak hours, track and signal enhancements, and prolonged span of service
- Measured and given voice to the region's unique business community through our annual Employer Survey
- Led long-term regional planning efforts, including the 495/MetroWest Development Compact and the Suburban Edge Community Commission, lending cohesive vision to the region
- Serves as the official Regional Economic Development Organization for the area, representing the region in employer retention, expansion, and attraction initiatives with state agencies, quasi-public entities, and statewide organizations



Background: Challenges & Key Strategic Issues

- **The case for the Partnership has not been clearly articulated.** Those in the know, know. But too many stakeholders are not aware of the Partnership and all that it offers. For multiple reasons, this fact makes it harder for the Partnership to be successful.
- **The Partnership is called upon to be involved in and knowledgeable on many issues but the demands exceed its capacity.** The demands are a sign of the respect which the Partnership has earned as well as the valuable role it plays as a trusted, neutral connector. However, the organization's current operating capacity is not adequate to meet the call for services.
- **The large Board of Directors needs more opportunities to engage in the Partnership's work.**
- **The need for the Partnership to advocate around transportation is clear but other needs are less clear.** The organization has set priorities to encourage the development of diverse housing, enhance workforce development, and advocate for the wise stewardship of both natural and built resources, but its role in achieving these goals has not been effectively articulated.
- **Demographic and environmental changes in the region will affect economic growth in the future.** The 36 communities have increasingly diverse populations (across all demographic traits) and a more expensive cost of living than the state overall. At the same time, the imperatives of climate change have forced a reckoning with the way in which the entire ecosystem is used, developed, and preserved for the health and safety of both humans and the natural world. The COVID-19 pandemic has added immediacy and urgency to this growing awareness of vulnerability and interconnectedness.



A New Plan

- The Partnership's most recent Strategic Plan was completed in 2008, with goals and objectives for 2011.
- A new plan had been in discussion since 2018, however staff transitions and the pandemic delayed the process.
- In 2021, the Partnership engaged the services of Ann Budner of ABudner Strategic Consulting to guide the development of a new Strategic Plan.



Our Planning Process

The planning work was divided into four phases, conducted virtually:

1. Initial development of needs assessment process with a Strategic Planning Committee
2. A virtual needs assessment with the entire Board of Directors (which is balanced among stakeholder groups)
3. Development of guiding principles (mission, vision, and values), goals, and strategies with the planning committee
4. Completing the plan by consultant and Partnership staff.

The process took five months. Ann Budner of ABudner Strategy Consulting facilitated the planning process, and Jay Vogt of Peoplesworth led the needs assessment.



Our Strategic Planning Committee

Our Strategic Planning Committee consisted of:

- Alison Field-Juma, Executive Director, OARS: For the Assabet, Sudbury, and Concord Rivers
- Greg Bunn, Executive Director, MassHire Metro South/West
- Karen Chapman, President & CEO, Corridor 9/495 Chamber of Commerce
- State Representative Carolyn Dykema (D-Holliston)
- Daniel Feeney, Principal, Vice-President, Beals + Thomas
- James Freas, Economic Development Director, Town of Natick
- State Representative Hannah Kane (R-Shrewsbury)
- Kristen Las, Assistant Town Manager, Town of Shrewsbury
- Shelby Marshall, Select Board Member, Town of Westborough
- Rob Nagi, Principal, Senior Project Manager, VHB
- Jason Palitsch, Executive Director, The 495/MetroWest Partnership
- Beth Reynolds, Economic Development & Community Outreach Director, Town of Ashland
- Trish Settles, Deputy Director, Central Mass. Regional Planning Commission
- Jeremy Thompson, Manager of Policy & Planning, The 495/MetroWest Partnership



Needs Assessment

In preparing this plan, we conducted an online needs assessment with the Partnership's Board of Directors as a proxy for the overall region. The assessment took place asynchronously, in several phases, over two months, culminating in a full Board meeting on October 6th where participants broke into smaller groups by topic area for more focused discussion.

The purpose of the online collaborative assessment was to identify the primary strategic needs in the region over the next five years. The assessment sought to identify the strengths of the Partnership and ways it could be stronger, as well as the trends shaping the region over the next five years.

The assessment identified priorities in each of three focus areas inspired by the vision, all with the goals of promoting sustainable economic growth and making the region a desirable place for all to live and work:

1. Well-stewarded natural and built resources
2. Diverse transportation choices
3. Diverse housing choices

Finally, participants were asked to assess the importance of any additional areas of focus not featured in the three inspired by the vision.

In each area, collaborating online participants anonymously and asynchronously proposed ideas (which were then combined, like with like), and rated their top ideas.



Guiding Principles: Mission & Vision

MISSION: The Partnership leads the advancement of the 495/MetroWest region as an exceptional location for people, businesses, and communities.

VISION: The 495/MetroWest region enjoys sustainable economic growth, well-stewarded natural and built resources, and diverse transportation and housing choices. Together, these assets make our region a desirable place for all to live and work.



Guiding Principles: Values

VALUES: We consider our values as we decide how to best advance the interests of our region and our stakeholders.

- **Collaboration and Innovation** – The Partnership draws strength from the breadth and depth of our public and private sector stakeholders. We advocate for their common interests and work together in pursuit of innovative, thoughtful, shared solutions to regional challenges.
- **Economic Development** – Our approach to economic development holds that our region’s transportation, housing, water, energy, and workforce resources are key to supporting strong businesses and continued growth; we advocate for our regional needs on these key issues to foster a climate that is desirable for both businesses and residents.
- **Complementary Growth** – A skilled and educated workforce, affordable and workforce housing, accessible and reliable transportation, and effective management of resources go hand in hand. These are both economic development issues and quality-of-life issues.
- **Stewardship of Natural Resources** – We advocate for thoughtful utilization of water, land, and energy resources and reducing our vulnerability and contribution to climate change; these principles are critical to the health of the public and the economy.
- **Equity and Inclusion** – Our region’s increasing diversity is an asset. Anyone who chooses to live and/or work here should be treated respectfully and equitably, and be welcomed to participate fully in all of our 36 communities. The Partnership is committed, together with our stakeholders, to eliminating systemic barriers where encountered in our work.

Strategic Goals

The plan includes five Strategic Goals identified as key to the organization's, and the region's, long-term success:

- 1. Operational Efficiency & Effectiveness:** Strengthen the Partnership's unique ability to speak for the needs of the 495/MetroWest region
- 2. Transportation:** Foster geographic equity by continuing to serve as the leading advocate for transportation investment in our region
- 3. Natural & Built Resources:** Advocate for and coordinate initiatives that build the sustainable use of natural and built resources in the context of climate change and other regional constraints
- 4. Housing:** Identify a regional strategy to increase housing diversity, including affordable and workforce housing
- 5. Workforce Development:** Strive to meet the workforce development needs of the region, including employer and job seeker needs

Strategic Goal: Operational Efficiency & Effectiveness

Strengthen the Partnership's unique ability to speak for the needs of the 495/MetroWest region.

Objective 1: Improve organizational efficiency

- Strategy 1: Increase Board member engagement
- Strategy 2: Utilize the decision tree to make engagement decisions about any new initiatives and to explain those decisions to stakeholders
- Strategy 3: Over the term of the plan, explore staffing and resource sharing options to assist with administrative, marketing and other operational tasks

Objective 2: Improve organizational effectiveness

- Strategy 1: Clearly highlight and communicate where the Partnership creates value in order to increase public and stakeholder awareness
- Strategy 2: Continue efforts of the Nominating Committee to increase Board member diversity
- Strategy 3: Engage non-Board member stakeholders more often and more effectively

Objective 3: Strengthen long-term sustainability of the organization

- Strategy 1: Increase private Investment by a specific target as recommended by the Investor Relations Committee
- Strategy 2: Involve Board members in peer-to-peer appeals to prospective Investors
- Strategy 3: Strengthen the Board Investor Relations Committee



Strategic Goal: Transportation

Foster geographic equity by continuing to serve as the leading advocate for transportation investment in our region.

Objective 1: Ensure that the transit and ridership needs of the region's diverse population, including its workforce population, are met

- Strategy 1: Serve as the leading regional voice to mitigate negative impact from the I-90 Allston Multimodal Project, and ensure the region's commuter and other interests are reflected in the final project
- Strategy 2: Advocate for improved commuter rail access and service
- Strategy 3: Support robust RTA service and work to improve connectivity between RTAs, and with other modes of transit
- Strategy 4: Work to increase First and Last Mile Service
- Strategy 5: Advocate for funding for, comment on impact, and mitigate impact of transportation projects within the region
- Strategy 6: Advocate for livability through transit options, e.g., improved rail trail connectivity, walkability, cycling opportunities, etc.
- Strategy 7: Identify employers' workforce transportation needs and address the barriers to incoming, outgoing, and internal mobility

Strategic Goal: Natural & Built Resources

Advocate for and coordinate initiatives that build the sustainable use of natural and built resources in the context of climate change and other regional constraints.

Objective 1: Use the 2018 Suburban Edge Community Commission (SECC) report and the 495/MetroWest Development Compact as starting points for priorities and regional consensus around natural and built resources

- Strategy 1: Review the Water, Energy, Commercial Development, and Downtown Revitalization recommendations in the SECC report and operationalize the areas where the Partnership can create meaningful impact at this time
- Strategy 2: Work with policymakers on laws and regulations that help to operationalize SECC recommendations
- Strategy 3: Work to develop a regional listing of Priority Development Areas (PDAs) and Priority Preservation Areas (PPAs)

Objective 2: Play to our strengths: leverage existing planning work and the expertise of the Partnership's stakeholders to support regional needs regarding climate change mitigation and carbon footprint reduction

- Strategy 1: Collaborate with watershed associations, municipal organizations, and other environmental organizations to support regional efforts and cooperation among municipalities
- Strategy 2: Work across disciplines to find solutions that account for the interrelation between the built and the natural environment
- Strategy 3: Collaborate with partners and other regional advocates and experts to support state greenhouse gas reduction policies and plans

Strategic Goal: Natural & Built Resources (Cont'd)

Advocate for and coordinate initiatives that build the sustainable use of natural and built resources in the context of climate change and other regional constraints.

Objective 3: Improve climate change resiliency in our area by helping to operationalize Municipal Vulnerability Preparedness plans (MVPs)

- Strategy 1: Advocate for resources for the region to turn MVP plans into action
- Strategy 2: Help to implement promising projects by finding common themes, sharing best practices, and fostering coordination
- Strategy 3: Incorporate private sector perspectives into environmental conversations (including businesses, trade associations, and Chambers)
- Strategy 4: Collaborate with Regional Climate Coalitions in our area (including watershed associations) on their climate change resiliency efforts

Objective 4: Increase investment in the region's water infrastructure

- Strategy 1: Advocate for investment in the Clean Water Trust
- Strategy 2: Support the #InvestInWaterMA initiative, which aims to see water, sewer, and wastewater infrastructure prioritized for new infrastructure funding

Strategic Goal: Housing

Identify a regional strategy to increase housing diversity, including affordable and workforce housing.

Objective 1: Identify where there is regional consensus on increasing affordable and workforce housing, and help to strengthen that consensus

- Strategy 1: Review the Housing recommendations in the 2018 Suburban Edge Community Commission (SECC) report and operationalize the areas where the Partnership can make a meaningful impact at this time
- Strategy 2: Offer communication materials that elevate the conversation around the meaning, benefits, resources, and successful strategies for diverse housing
- Strategy 3: Leverage the voice of the business/employer community in conversations about workforce development and its relation to housing
- Strategy 4: Serve as an informational resource and community convener by connecting stakeholders with existing housing resources and each other
- Strategy 5: Work across disciplines to find housing solutions that address both housing and environmental concerns

Objective 2: Advocate for resources to assist municipalities in developing diverse housing

- Strategy 1: Obtain state and/or federal funding to support housing innovations in our region

Strategic Goal: Workforce Development

Strive to meet the workforce development needs of the region, including employer and job seeker needs.

Objective 1: Leverage the Partnership's unique relationships among stakeholders and its ability to bring them together (employers, workforce boards, chambers of commerce, higher education institutions and other training partners)

- Strategy 1: Review the Educational Attainment and Skills recommendations in the 2018 Suburban Edge Community Commission (SECC) report and operationalize the areas where the Partnership can make a meaningful impact at this time
- Strategy 2: Hold educational forums to share best practices
- Strategy 3: Increase area business involvement in workforce development efforts
- Strategy 4: Continue to conduct annual employer survey and share results more widely



Outcome Benchmarks: Tracking our Progress

In close collaboration with the staff, the Executive Steering Committee (ESC) will write the metrics for Goal #1. The Board will write the metrics for the policy-related goals. The process of completing the metrics will also create a new avenue for Board members to participate in policy making and strategic direction for the Partnership.

For each Strategy, a Metric or Metrics will be devised, each consisting of:

- Identification of the measurement or indicator
- FY21 Baseline
- FY22 Forecast
- Annual Target
- Tool(s)
- Key People
- Deadline(s)

Pending adoption of this plan in March, Metric development will follow in Spring 2022.



How to Offer Feedback

- Comments and questions welcome!
- Online Feedback Form
- Contacting the Executive Director

The full text of the plan & online feedback form can be found online at 495Partnership.org/Strategic-Plan

Questions & Comments

- Thank you for participating!
- The Executive Director can be reached by phone at (774) 760-0495, or via email at Jason@495Partnership.org

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