



Strategic Plan

March 15, 2023

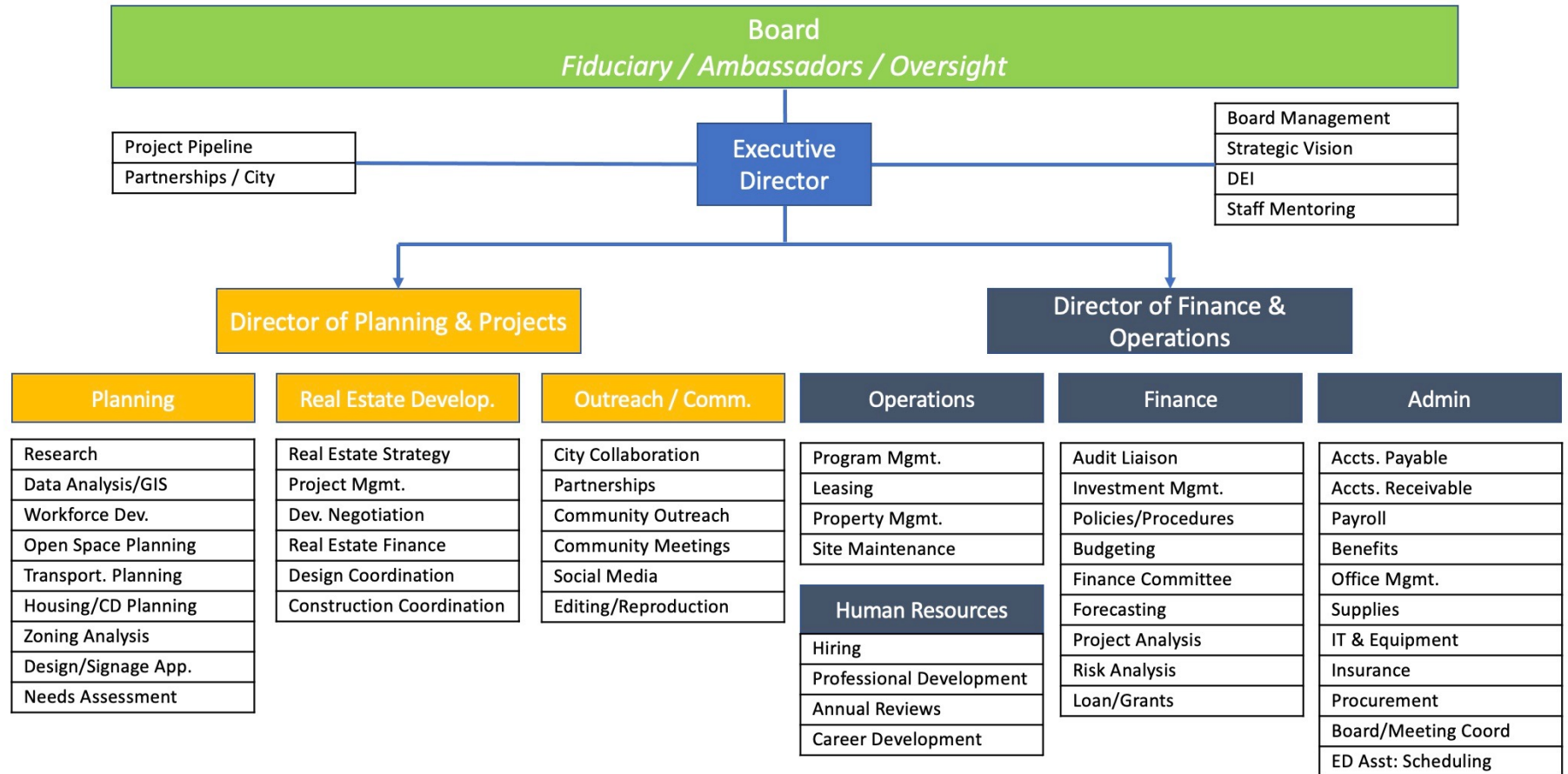
AGENDA

1. Overview of Strategic Plan
2. External Activities and Projects
3. Financial Strategy
4. Internal Operations
5. Engagement
6. Next Steps



Dance class at the Foundry

INTERNAL OPERATIONS: CURRENT ORGANIZATIONAL STRUCTURE



INTERNAL OPERATIONS: SUPERVISION AND MENTORING

Goals: Build Leadership Team and Encourage Staff Retention



Kyle Vangel
Director, Projects/Planning



Tom Evans
Executive Director



Director, Finance/
Administration



Fabiola Alikpokou,
Senior Planner



Cecelia Cobb, Project
Planner



Alexandra Levering, Senior
Project Manager



Matt Heller-Trulli,
Senior Asset
Manager



Ellen Shore,
Operations Director



Finance
Manager



Project
Manager

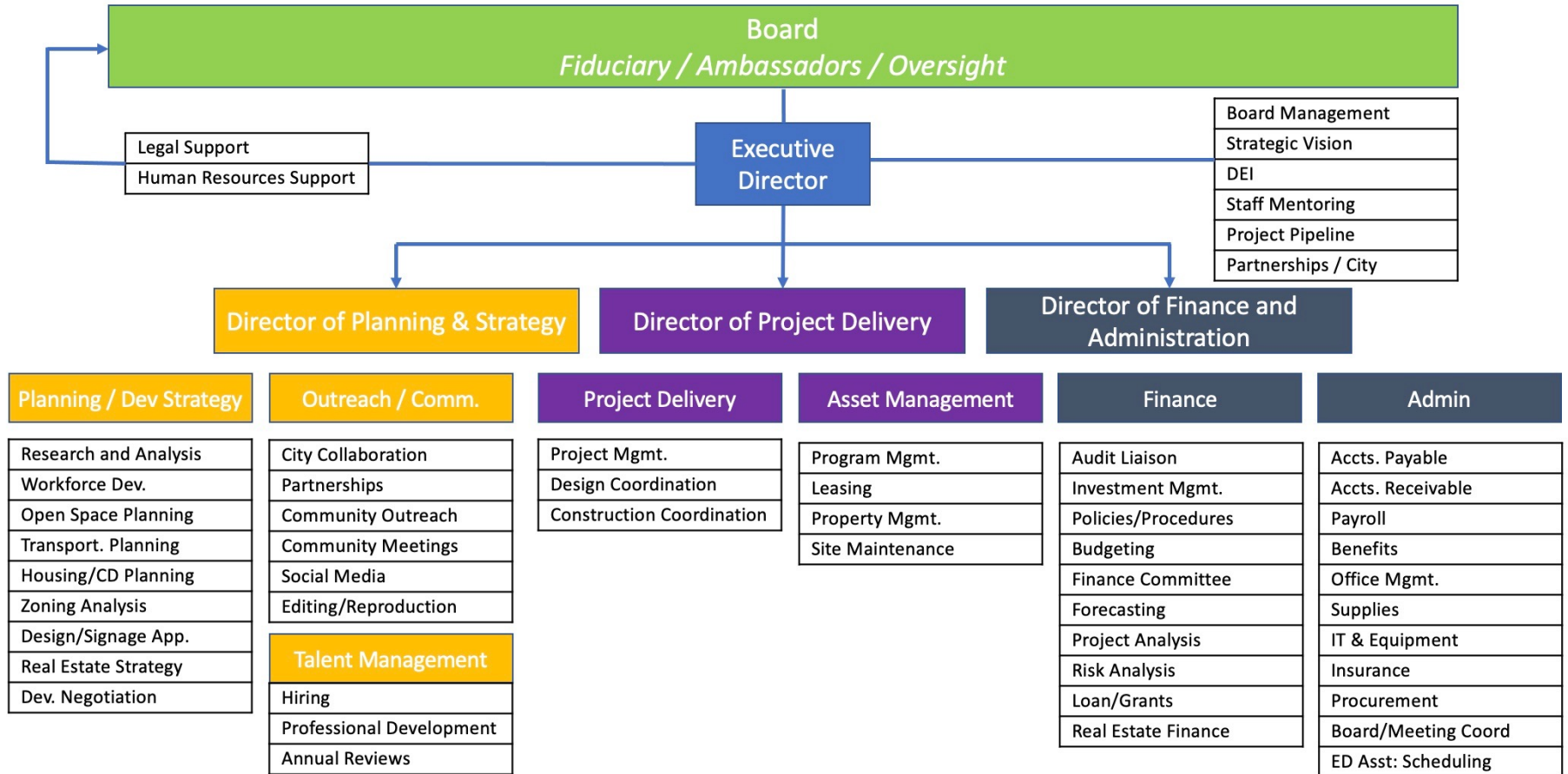


Project
Planner

INTERNAL OPERATIONS: KEY CHALLENGES OF CURRENT STRUCTURE

1. Human Resources function not adequately defined – floating in space
2. Real estate finance separated from Director of Finance and Admin
3. Very wide purview of two Director positions – spread thin

INTERNAL OPERATIONS: RECOMMENDED ORGANIZATIONAL STRUCTURE



INTERNAL OPERATIONS: KEY RECOMMENDED CHANGES

1. Creation of third Director position focused on Project Delivery and Asset Management
 - Consolidates Director responsibilities
 - New position to be filled once enough projects approach construction phase
2. Human Resources function defined and allocated
 - Talent Management under Director of Planning and Strategy
 - Outside HR Support (and Legal) report to ED with direct line to the Board
3. Real estate finance unified with Director of Finance and Admin

PROJECT WORKFLOWS

Goals: Define Staff Roles and Responsibilities for Project Lifecycle

Four most common project/initiative types:

1. Real Estate Development
2. Community Infrastructure
3. Funding and Financial Products
4. Research and Design

Example: Real Estate Development Project Workflow

Phase I: Due Diligence	Phase II: Planning & Design	Phase III: Production/Delivery	Phase IV: Transition	Phase V: Asset Management
3 months	6 - 12 months	18 - 24 months	6 months	Ongoing
Level of Effort: 4	Level of Effort 2	Level of Effort: 5		Level of Effort: 2
Personnel (Functional Role)				
Sr. Leader: Dir. Of Projects & Planning			Sr. Leader: Director of Finance & Administration	
Sr. Advisors	Sr. Advisors	Sr. Advisors	Sr. Advisors	Sr. Advisors
Project Manager	Project Manager	Project Manager	Project Manager and Asset Manager	Asset Manager
Project Planner	Project Planner	Project Planner		
Consultants (Report to Project Manager)	Consultants (Report to Project Manager)	Consultants (Report to Project Manager)	Consultants (Report to Project Manager)	Consultants (Report to Asset Manager)
Architecture	Architecture	Engineering	Construction (GM)	Site Management
Engineering	Engineering	Construction (GM)	Site Management	Legal
Cost Analysis	Cost Analysis	Site Management	Legal	Realty
Surveying	Surveying	Legal	Realty	Maintenance Firm(s)
	Design			

INTERNAL OPERATIONS: PROJECT MANAGEMENT

Goals: Implement better tools and training for staff

Project Management Tools

- **Smartsheet** implemented to develop and track project schedules
- Enhanced billing and contract management procedures
- New schedule of project-specific check-ins across organization



Foundry Construction Site

INTERNAL OPERATIONS: PROFESSIONAL DEVELOPMENT

Learning and Growth

- Professional development budget established for each staff member to pursue trainings, conferences, and courses
- Enhanced focus on check-ins and mentoring
- CRA as a model, developing talent of the future

Transformation

- Implementation of DEI Action Plan
- Growth of organization in staff and responsibilities
- Reflective practitioners: performance reviews as process tool for individuals and organization to grow and learn
- Long term success is CRA's ability to form allies at every level and sector



Culture of belonging, contribution, and teamwork

INTERNAL OPERATIONS: CONTRACT MANAGEMENT

Goals: Standard terms and conditions; rigorous negotiation of scopes and fees, legal review, and management of payments according to deliverables

Project-based

- Legal
- Design: architecture, urban design, landscape architecture
- Engineering and cost estimating
- Real estate: finance, brokerage, appraisals

Administrative

- Legal
- Property management/site maintenance
- Audit
- Human resources
- IT / technology / equipment
- Financial: investment management, banking
- Insurance



95-99 Bishop Allen Construction Site

Contracts may be multi-year service agreements, tied to specific scopes of service, or house doctor contracts

INTERNAL OPERATIONS: OFFICE CULTURE

Ongoing initiatives

- Follow-through on DEI Action Plan
- Preparing to recruit human resources function
- Implemented efficient new structure for weekly staff meetings
- Weekly Lunch and Learn sessions alternating between organizational and project-specific content
- Clarified approach to permanent hybrid office environment with in-office collaboration days



Team pride in project completion

INTERNAL OPERATIONS: BOARD STRUCTURE

Five members:

- Staggered terms
- Four appointed by City Manager
- One appointed by State

Succession strategy:

- Define attributes needed on board
- Align with City processes
- Draw on networks of partners (SAG, FAC, FF, other)

Portfolios and Subcommittees:

- Existing: Finance, Design
- Recommended: Personnel



INTERNAL OPERATIONS: ATTRIBUTES NEEDED ON BOARD

Specific Expertise and Knowledge

- Finance and Budgets
- Real Estate Development
- Small Business and Entrepreneurship
- Energy Efficiency and Climate Resilience
- Legal
- Broad Capacity and Range
- Ambassador for the CRA

Work Style

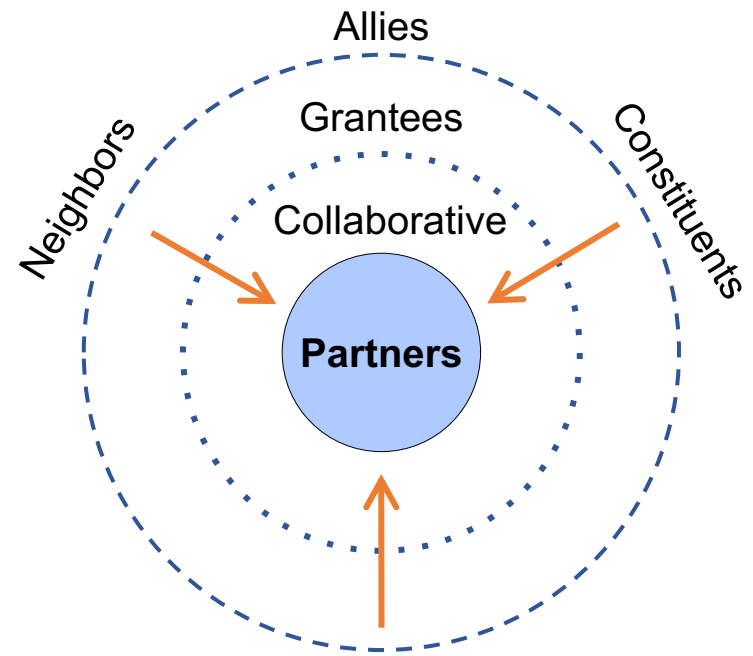
- Versatile
- Confronts challenges
- Makes decisions
- Has time availability
- Sees the overall perspective
- Collaborative
- Navigates change

ENGAGEMENT: RELATIONSHIPS WITH PARTNERS

- Realize shared interests, minimize redundancy, fill gaps
- Culture of investment in long-term relationships
- Nurture informal and grantee relationships; be present and “on the ground”
- Leadership development through FAC, SAG, and other



Forward Fund and other programs expand our network



Partner Relationship Diagram

ENGAGEMENT: ECOSYSTEM MAPPING

Chart of City, CRA, and Non-Profit Sector Roles

ISSUES	City	CRA	CDC's (HRI, JAS)	BID	Other Partners
Affordable Space for Small Business/ Non-Profits	Citywide: data, programs, resources, COVID-19 funds	Forward Fund, COVID-19 funds, 99 Bishop Allen, Foundry		Marketing Ambassadors Clean/Safe	Business Assoc's; Black Business Network, Chamber
Affordable Housing	Citywide: inclusionary housing, Trust Fund, CPA, homebuyer classes and financing, CHA	JAS loans; Margaret Fuller lot; MXD off-site housing	Affordable housing development, preservation, and resident services		Housing advocacy organizations
Culture	Cambridge Arts Council	Foundry; Forward Fund		Marketing; pop-ups; murals; events	Many dance, theater, arts, youth orgs.
Workforce	Neighborhood Jobs Trust; youth and other programs	The Link; Foundry; research studies	Workforce training (JAS)		Many education and training providers
Parks/ Civic Spaces	Citywide: planning, design, construction, maintenance	Parcel 6, Point Park, Kendall Sq. activation		Activation	Open space advocacy groups
Transportation	Citywide: planning, design, maintenance of bike lanes, sidewalks, streets	KSTEP, Kendall Square studies, 6 th Street, Binney Street			Bike and transit advocacy groups
Climate Change and Energy	Citywide: planning and policies	Project-based sustainability	Project-based sustainability		Environmental advocacy groups
Development Approvals	Citywide: design review; zoning and permitting	MXD development and design review			

ENGAGEMENT: STRATEGIC ADVISORY GROUP

- Preliminary Finding of Strategic Plan in 2021
- Purpose: amplify community networks, outreach, local knowledge, and special areas of expertise
- Inform Strategic Plan and its implementation
- Established Fall 2021, 12 members, with one-year terms
- Seven meetings: CRA Overview, Bishop Allen/Central Square, Kendall Square projects and walking tour, DEI, and Strategic Plan review sessions



SAG members on walking tour of Kendall Square

Jason Alves | Tony Clark | Esther Hanig | George Metzger | Miriam Ortiz | Cheryl Patterson Munroe
Allan Sadun | Elena Sokolow-Kaufman | Richard Thal | Mark Tang | Ben Turpin | Nicola Williams

ENGAGEMENT: STRATEGIC ADVISORY GROUP

- An experiment in enhanced community input for the CRA
- Term expires after April 2023 meeting
- Future commitment to the model of the Strategic Advisory Group



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NEXT STEPS

SCHEDULE

Mar 2023	Board Meeting	Review Internal Operations and Engagement
Apr 2023	SAG Meeting	Review Final Draft
Apr 2023	Board Meeting	Review Final Draft
May 2023	Board Meeting	Adopt Strategic Plan



Strategic Plan

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