EAST PROVIDENCE OLDHAM SCHOOL FEASIBILITY STUDY

Market Analysis
New Venture Advisors
November 6, 2024

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PROJECT OVERVIEW (FROM RFP)

Assignment

Determine the ideal components, programs, services, and feasibility of a multiuse small business incubator in a former municipal elementary school in East Providence, Rhode Island

Project Goal

Develop a feasible concept for a multiuse business incubator situated at the former Oldham Elementary School building in East Providence that creates jobs through business startups and provides a supportive network and resources that will ensure a greater level of long-term success for these small businesses

Project Hypothesis

Based on independent research conducted to date, the City has identified the need for specialized food production and other small business supports that are not currently being captured by existing incubators in the state, including spaces for

- baking
- gluten-free designated production
- food packaging
- arts-based business incubation
- blue economy industries (renewable energy, aquaculture, seabed extractive activities and marine biotechnology and bioprospecting)

An incubator space putting these and other businesses in proximity could promote mutual support and cross-pollination that strengthens them individually and creates a greater whole.

Key Research Questions

- What are the best use cases for Oldham?
- Among potential users of the space, what is the level of interest? What are their goals and objectives? Needs and requirements?
- What is the ideal way to incorporate these into the design, operations and business plan for the facility? What constituent parts will a viable facility at Oldham include?
- What will it cost to develop, build, finance, and operate the incubator? What are the realistic funding options?
- In what ways can cooperative partnerships with community and civic groups contribute to the long-term success of entrepreneurs?

Project Beneficiaries

Encourage the establishment of small business start-ups with an emphasis on supporting the most disadvantaged citizens in East Providence

RESEARCH OVERVIEW

Research Goal

- Assess community needs and determine the ideal spaces, programs, and services that Oldham School could offer to local businesses (“use cases”)

Components for Validation

- a food business incubator with shared or private kitchen spaces
- an arts, trades, or makers space with workshop, studio, or gallery spaces
- a blue economy incubator with spaces for product development or testing
- co-working or private offices spaces
- small business support programming, such as training or workforce development
- community access spaces, such as event spaces or recreational facilities

General Research Questions

- What is the level of interest across potential users, and what are their space needs and requirements?
- What rental terms (price, length of lease) are preferred?
- Are there any specialized aspects of any of these industry groups that would be incompatible with other functions?
- How should the space be allocated between private working spaces and spaces that are accessible to the community?
- Are there any existing organizations that may be interested in supporting operations of the facility?

RESEARCH TOOLS

Tools	Timeline	Audience	Information Goal
Preliminary interviews	May	Key stakeholders to provide background on project and hypothesis	Inform project approach and interview guides
Interviews	July – October	- community groups - business associations - government stakeholders - nonprofits - university/education institutions - existing concepts/competitors	Assess stakeholder interest in redevelopment; prioritize components of facility; identify resources and anticipated challenges
Surveys	July – October	Potential tenants: - food businesses - arts businesses - blue economy businesses	Assess interest in participating in incubator; Identify needs and requirements
Secondary research	May – October	N/A	Understand local landscape (supply/demand, existing infrastructure, competition, workforce, demographics)
Mapping	July – August	N/A	Visualize geography of potential users, competitors, infrastructure

LOCAL LANDSCAPE

Demographics
Employment & Workforce
Existing Infrastructure

DEMOGRAPHICS

East Providence is home to 47,012 residents, which **decreased by 0.3%** between 2010 and 2022, with **7.4% of families living below the federal poverty line**.

East Providence's median household income of $71,736, **13% lower than the statewide median income**.

East Providence has a **higher proportion** of both **foreign-born residents** and **residents aged 65 or older** compared to the average for the entire state.

East Providence's 5.4% unemployment rate is equivalent to the state average for Rhode Island.

		East Providence	Rhode Island
Population		47,012	1,097,379
Population growth Y-o-Y change		-0.3%	0.2%
Median age (years)		43	40.7
% children (<18 years of age)		16.2%	19.9%
% seniors (>65 years of age)		**21.8%**	18.3%
% foreign born		**17.5%**	14.7%
Race %	White	86.3%	80.1%
	Black or African American	9.0%	10.2%
	American Indian and Alaska Native	1.7%	1.8%
	Asian	2.6%	4.6%
	Some other race	9.2%	16.9%
Ethnicity %	Hispanic or Latino (of any race)	8.2%	17.6%
	Not Hispanic or Latino	91.8%	82.4%
Households		20,410	432,219
Median income		$71,736	$81,854
% poverty – all families		**7.4%**	6.7%
Unemployment rate		5.4%	5.4%

Sources: U.S. Census Bureau. American Community Survey 5-Year Estimates, 2022; RI Dept of Labor & Training, Local Area Unemployment Statistics, 2023.

EMPLOYMENT & WORKFORCE

Over the next ten years, Rhode Island projects **16.5% growth in food manufacturing.**

- Fishing, performing arts, and related industries are expected to see expansion, but the **anticipated increase in employment opportunities within these fields remains modest**
- In East Providence, retail trade employs 13.7% of the population and arts, entertainment, and recreation, and accommodation and food services employ 5.8% of the population

The fastest growing occupations in Rhode Island that are also high demand jobs include **restaurant cooks, stockers, and light truck drivers**.

From 2020 to 2021 **nonemployer establishments* in the Providence-Warwick metropolitan area grew from 117,000 to 125,771**. Of these,

- 5,053 are independent artists, writers, and performers
- 1,488 are in fishing
- 1,090 are in special food service (including caterers, food trucks)
- 195 are in food manufacturing (like jams, canning, and other packaged goods)

Rhode Island Industry Projections	2022 Average Employment	2032 Projected Employment	% Change
Fishing, hunting & trapping	70	80	14.3
Food manufacturing	**4,076**	**4,750**	**16.5**
Food & beverage retailers	12,221	12,750	4.3
General merchandise retailers	7,255	7,600	4.8
Support activities for transportation	1,246	1,500	20.4
Performing arts, spectator sports, and related Industries	1,345	1,410	4.8
Food services & drinking places	44,025	46,100	4.7

Fastest Growing Occupations in Rhode Island	% Change 2022–2032	High Demand Job
Data scientists	32.1	
Industrial machinery mechanics	27.5	
Cooks, restaurant	**23.3**	**x**
Welders, cutters, solderers & brazers	18.0	
Exercise trainers & group fitness instructors	16.8	x
Stockers & order fillers	**15.1**	**x**
Light truck drivers	**12.9**	**x**
Bakers	12.5	
Driver/sales workers	12.0	x
Laborers & freight, stock & material movers	8.7	x
Dining room & cafeteria attendants & bartender helpers	8.6	x
General & operations managers	8.2	x
First-line supervisors of retail sales workers	6.2	x
Food preparation workers		x

Sources: U.S. Census Bureau. American Community Survey 5-Year Estimates, 2017–2022; U.S. Census Nonemployee Establishments in Providence County, 2021; State of Rhode Island Department of Labor & Training, 2022–2032 Industry & Occupational Projections.

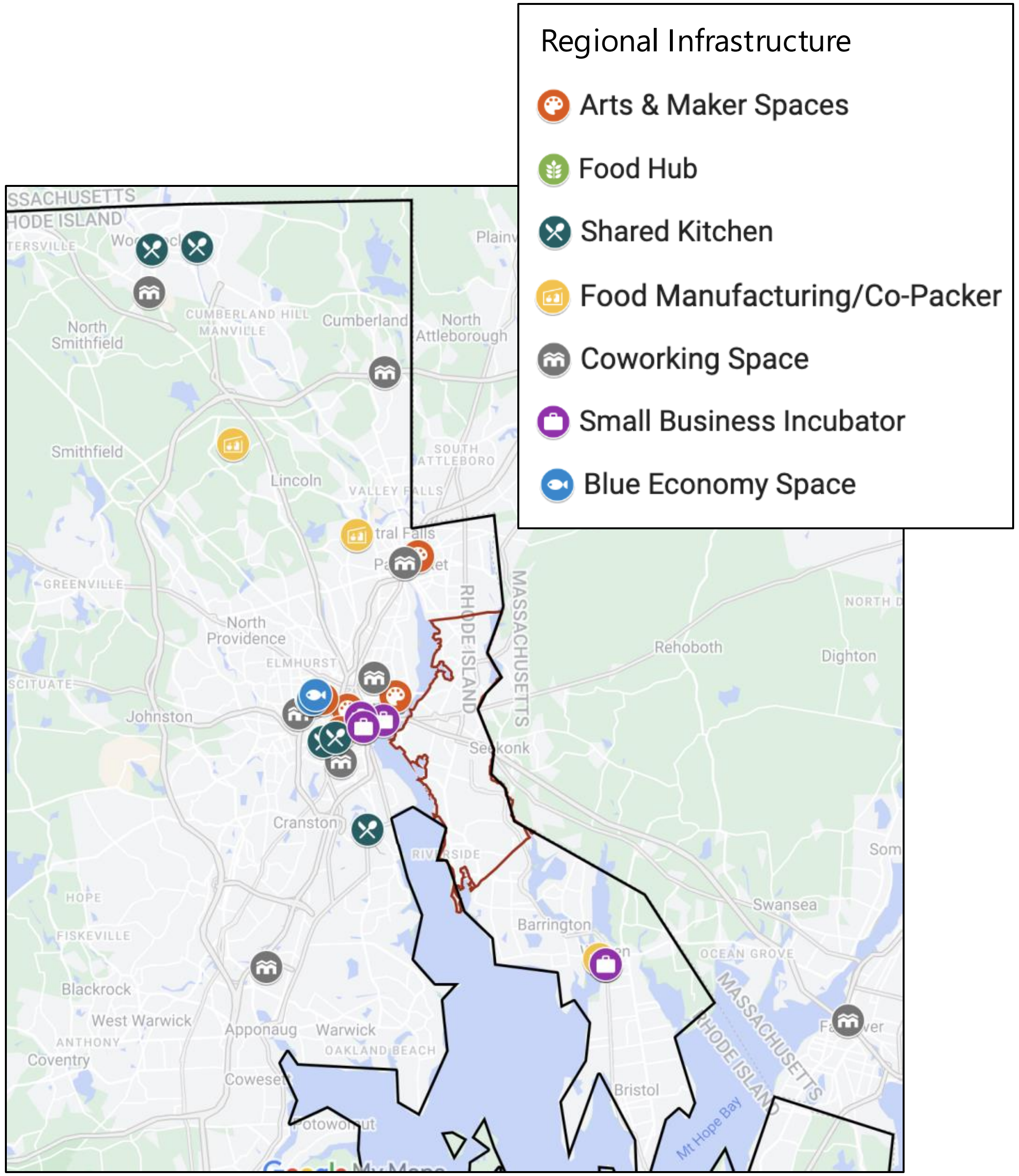
*"Nonemployer establishments" are a designation under the U.S. Census and Department of Labor and refer to businesses that are "self-employed individuals operating unincorporated businesses (known as sole proprietorships)" with a sole employee/owner. They are used as a proxy to identify the number of very small, independent businesses in the region.

EXISTING INFRASTRUCTURE

A number of existing spaces to support entrepreneurs and small businesses were identified in the region.

However, **none of this infrastructure is located in East Providence**.

Providence and surrounding areas currently have approximately
- 6 arts and maker spaces
- 13 coworking spaces
- 4 food hubs
- 4 food manufacturing and co-packer facilities
- 7 shared kitchens
- 5 small business incubators
- 3 blue economy spaces



View the interactive map here

GENERAL RESEARCH FINDINGS

Interview Participants
Survey Respondents
Concept Support
Keys to Success and Anticipated Challenges

INTERVIEW PARTICIPANTS

NVA conducted 48 interviews, gathering input from **53 people** representing **44 organizations**

- food sector (10)
- arts & creative sector (5)
- blue economy sector (9)
- government stakeholders (6)
- community groups (4)
- facility stakeholders (2)
- workforce, coworking, and/or business incubation groups (12)

Interviews were conducted primarily through phone call or video call between May and October 2024.

Organizations Engaged	
401 Tech Bridge	Hope & Main
Blue Economy Podcast	Innovation Studio
Blue Venture Forum	Johnson & Wales University
Boys and Girls Club of East Providence	Newport Chamber of Commerce / Innovate Newport
Branchfood	Ocean Tech Hub
Center for Southeast Asians	Red Tomato
CIC (Cambridge Innovation Center)	Rhode Island Commerce Corporation
City of East Providence	Rhode Island Food Policy Council
Commercial Fisheries Center of Rhode Island	Rhode Island Small Business Development Center
DESIGNxRI	Rhode Island State Council on the Arts
East End Theater	RI Department of Labor and Training
East Providence Area Chamber of Commerce	RI Hospitality Association
East Providence Arts Council	RI Skills for RI Future
East Providence Health Equity Zone (HEZ)	RIHub
East Providence Heritage Arts Inc.	Riverside Renaissance Movement
East Providence High School Career and Technical Center	SeaAhead
East Providence Public Works Department	Social Enterprise Greenhouse
East Providence School Department	South Side Community Land Trust
EatDrinkRI	Spirit Advisory/V2Subsea
Education Exchange, Inc.	URI Research Foundation
Entrepreneurship for All	Venture Cafe
Farm Fresh RI	Waterson Terminals

SURVEY RESPONDENTS

The survey was open for six weeks, from mid-August through late September and received **36 responses.**

Although the survey was offered in four languages (English, Spanish, Portuguese, and Cape Verdean Creole), **all responses were recorded in English.**

Respondents represented existing business owners and aspiring entrepreneurs across all three business sectors, with **64% of responses from the arts and makers sector**.

Respondents were primarily White (82%).

What is your Zip Code? (Q2)

ZIP Code	City	Count	%
02915	East Providence (Riverside)	22	65%
02914	East Providence	8	24%
02822	Exeter	1	3%
02840	Newport	1	3%
02916	East Providence	1	3%
02925	Providence	1	3%
Total respondents		**34**	

What is your business type? (Q3)

Business Type	Existing	Aspiring	Total	%
Food business	4	5	9	25%
Arts, crafts, trades, or maker	14	9	23	64%
Blue economy	2	2	4	11%
Total respondents	**20**	**16**	**36**	

What is your racial or ethnic identity? (Q59)

Racial or Ethnic Identity	Total	%
White	23	82%
Multi-racial	3	11%
African-American/Black	2	7%
Total respondents	**28**	

CONCEPT SUPPORT

Both survey respondents and interviewees were **largely supportive** of the adaptive reuse of Oldham School, although a few expressed **concerns about gentrification.**

Although a few people identified potential conflicts between industries or between spaces with both commercial and public use, the majority did not.

Instead, people believe that **hosting multiple programs in the space would support collaboration across industries and public engagement.**

Several people emphasized that the site's **core audience should be residents of East Providence** rather than those of the state or broader region.

There was mixed feedback on the stage of businesses that would benefit most from the facility; survey respondents favored pre-launch and early-stage businesses, while interviews with food industry stakeholders emphasized the need to support second-stage businesses.

This is a wonderful initiative. I'm excited to see the future developments!

East Providence would benefit from a space like this.

I am very happy that the Oldham School building is being considered for these purposes.

Let's get started rehabbing Oldham. It's been vacant for too long...Would love to have a space that the community can benefit from.

Based on your local experience, what types of businesses could benefit most from this facility and its business development programs? (Q53)

Target Business Type	Total	%
Pre-launch entrepreneurs	7	32%
Early-stage businesses (1–3 years in business)	7	32%
Second-stage/mid-stage businesses (3–5 years in business)	2	9%
I'm not sure	6	27%
Total respondents	**22**	

KEYS TO SUCCESS AND ANTICIPATED CHALLENGES

Respondents emphasized that the site should

- have **strong community support** from local residents
- be **affordable**; business owners prefer an hourly rental rate of $20 per hour or less
- be **physically accessible**, with bus access, walking paths, and parking
- have a **strong financial model** and management plan
- provide **childcare access** for both space users and local community members

Earning community buy-in and **acquiring sufficient funding**—for both the building itself and its business users—were mentioned as potential barriers.

> Please make sure that this facility is accessible **without a car**...Make paths to walk into and around the facility, connecting it to the neighborhood. Bring a new bus stop to serve the facility, and build a shelter for riders who are waiting.

> I feel this project absolutely needs to be accepting to all, not just to people who have always had access to these opportunities.

FOOD SECTOR

- Industry Landscape
- Stakeholder Input
- Commerce Study Findings
- Food Spaces
- Kitchen Spaces
- Summary of Findings

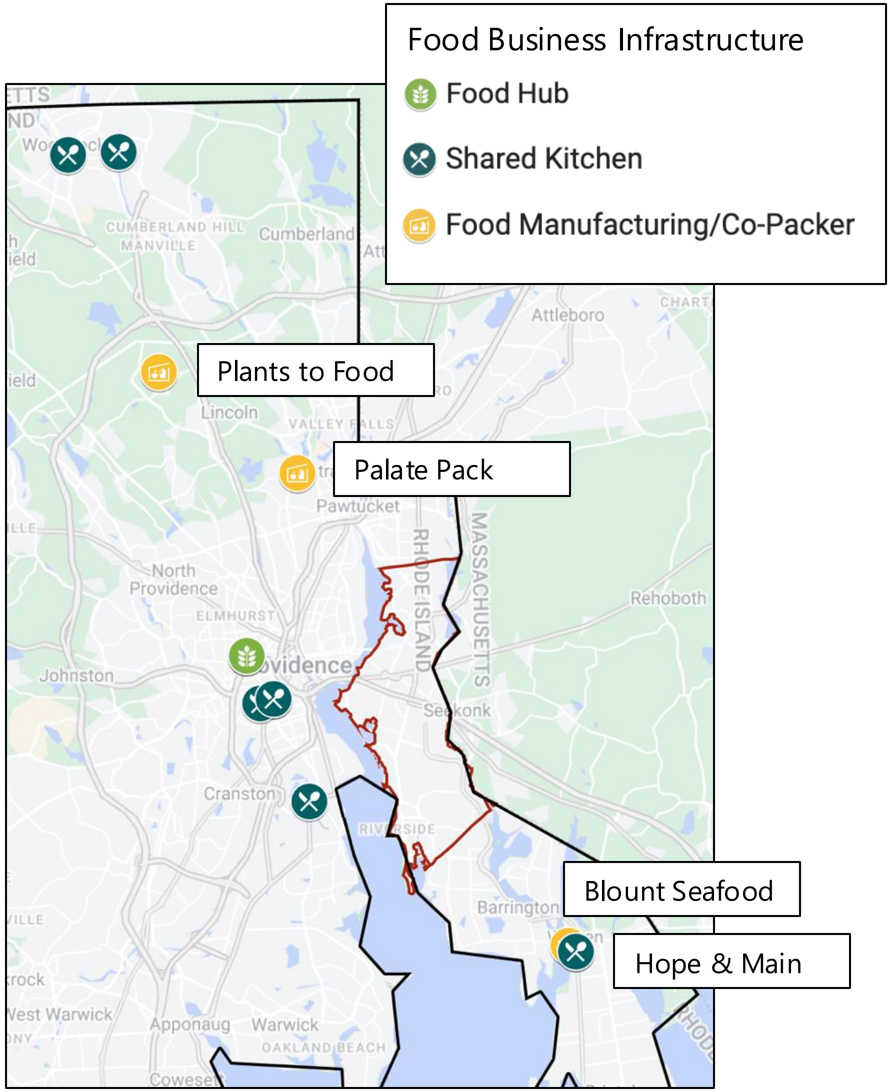
FOOD INDUSTRY LANDSCAPE

Rhode Island's food industry is growing.

- Food manufacturing is projected to grow by 16.5% over the next 10 years
- Restaurant cooks are among the fastest-growing occupations in the state, anticipated to grow by 23.3%
- Research identified seven shared kitchens, four food manufacturers/co-packers, and four food hubs in the region

The closest food business incubator, **Hope & Main, is just five miles** (15-minute drive) **from Oldham** in Warren. Since 2014, Hope & Main has supported the launch of nearly 450 businesses. Its 17,500 sq ft facility includes three kitchen spaces and limited co-packing space. They are currently developing a second, 24,500 sq. ft. facility in Providence, which will include contract manufacturing space.

Other local co-packing spaces include Palate Pack, which is focused on beverages (12 mi. away), and Plants to Food, which is focused on vegan and vegetarian food (16 mi. away).



FOOD INDUSTRY INPUT

Feedback on food industry needs were gathered through ten stakeholder interviews and nine survey responses.

Respondents identified a need to support small-to-medium sized businesses with manufacturing, especially **food business manufacturing**.

Interviewees mentioned a need for **co-packing and food processing spaces** as well as supportive spaces and services to support licensing and certification, lab testing, food safety training, packaging, and labeling.

Currently, many businesses that graduate from Hope & Main's incubation program **move outside the state due to a lack of local infrastructure to support their growth**. Interviews indicate that start-up food businesses are well served with existing programs but second- and third-stage businesses are in need of greater support.

Surveyed food businesses cite the **high costs of business** and **finding skilled labor** as their top challenges.

COMMERCE STUDY PRELIMINARY FINDINGS

Rhode Island Commerce Corporation is also undertaking a **state-level study** to identify the challenges and opportunities for **second-stage food businesses to grow and thrive in the state**.

The study team's working definition considers second-stage businesses to be those with "a stable product(s), process, market, and administration."

Preliminary findings as of September 2024 indicate

- Existing food incubation resources are effective, but there is a gap in support for businesses beyond this stage
- There is a need for **co-packing on a small-scale and for specialized products**; existing copackers have unreliable quality and consistency
- Spaces and services **need to be affordable, "right-sized," and "food-ready**"
- **Capital and cash flow are challenges**; there is a need for funding for food businesses at all stages
- Businesses are interested in **shared spaces and services**, including a distribution cooperative, shared kitchens, and shared equipment

The final report and recommendations are expected to be finalized in November 2024.

FOOD SPACES

Food businesses are primarily interested in **kitchen space** and **event space.**

- Two food businesses are in need of allergen-specific space
- A particular focus on baking or gluten-free production (included in the project hypothesis) were not identified

Two food businesses – a wellness food/juice company and a local restaurant/caterer - are interested in having **retail or café space to sell to the public.**

- Farm Fresh RI is an example of a successful space that food production spaces in conjunction with retail spaces

Kitchen users (see next slide) are also seeking sinks for washing both kitchen supplies and produce, and half anticipate needing access to loading dock.

What type of space(s) are you interested in? (Q20)

Interested Space — Food Businesses	Total	%
Kitchen space	4	67%
Food processing space	3	50%
Event space	3	50%
Allergen-specific processing or kitchen space	2	33%
Retail space for selling packaged products	2	33%
Café or restaurant for selling foods and beverages	2	33%
Storage space (dry, cold, frozen)	2	33%
Demonstration kitchen for interacting with the public/audiences	1	17%
Outdoor space for a food truck or other use	1	17%
Total respondents	**6**	

Which of the following spaces will you need access to? (Q37)

Space Requirements — Kitchen Users (Food and Makers)	Total	%
Scullery or washing station	5	63%
Produce washing station (crops or eggs)	5	63%
Loading dock	4	50%
Animal product wash/sort station (shellfish, fish, animal meats)	1	13%
None of the above	1	13%
Total respondents	**8**	

KITCHEN SPACES

Ten survey respondents – including six in the food industry and four in the arts industry – **expressed interest in using kitchen space** at Oldham.

Top spaces desired include

- Kitchen with access to a hot line
- Food processing space
- Packaging space

Sixty-three percent of respondents said they *might be interested* in having staff prepare their product for a fee, while the remainder prefer to rent the kitchen for their own use.

The **majority need space that is 500 sq. ft. or smaller**.

One full-service restaurant and catering company in East Providence requested over 1,000 sq. ft. of private kitchen space that they would use over 40 hours per week.

Which of the following processing techniques do you employ or plan to employ? (Q35)

Processing Techniques	Total	%
Cooking with access to a hotline	5	71%
Assembly of dry ingredients	4	57%
Cutting, slicing, shredding of fresh produce	4	57%
Packaging (batch or at scale)	4	57%
Bottling	3	43%
Canning or preserving in jars	3	43%
Non-food production (i.e., tinctures, balms)	3	43%
Drying or dehydration	2	29%
Freezing (with blast chiller)	2	29%
Juicing	2	29%
Baking	2	29%
Breadmaking	2	29%
Milling, grinding, or seed collection from staple crops	1	14%
Specialty beverage (brewing, distilling)	1	14%
Butchery or meat handling	1	14%
Smoking, curing, or sausage making	1	14%
Total respondents	**7**	

FOOD SECTOR SUMMARY

Interest Level

- Anticipated industry growth indicates a need for additional infrastructure and programs
- Market analysis interest was moderate; six food businesses expressed interest in utilizing kitchen space at Oldham

Space & Service Needs

- food manufacturing/co-packing space and associated services (lab testing, labeling) for second-stage businesses
- limited need for shared kitchen space for entrepreneurs for cooking and light processing
- limited need for private kitchen use
- event space and a loading dock
- potential for a retail or café/restaurant space

Limitations & Areas for Further Research

- Only nine food businesses participated in the survey; additional outreach may be needed to confirm that there is sufficient interest for food-specific infrastructure and programs.
- Co-packing/manufacturing requires strict food safety and kitchen design requirements; as a next step, it will be important to assess the facility's fit for these purposes and the potential conflict with providing public access to the site.

ARTS & MAKERS SECTOR

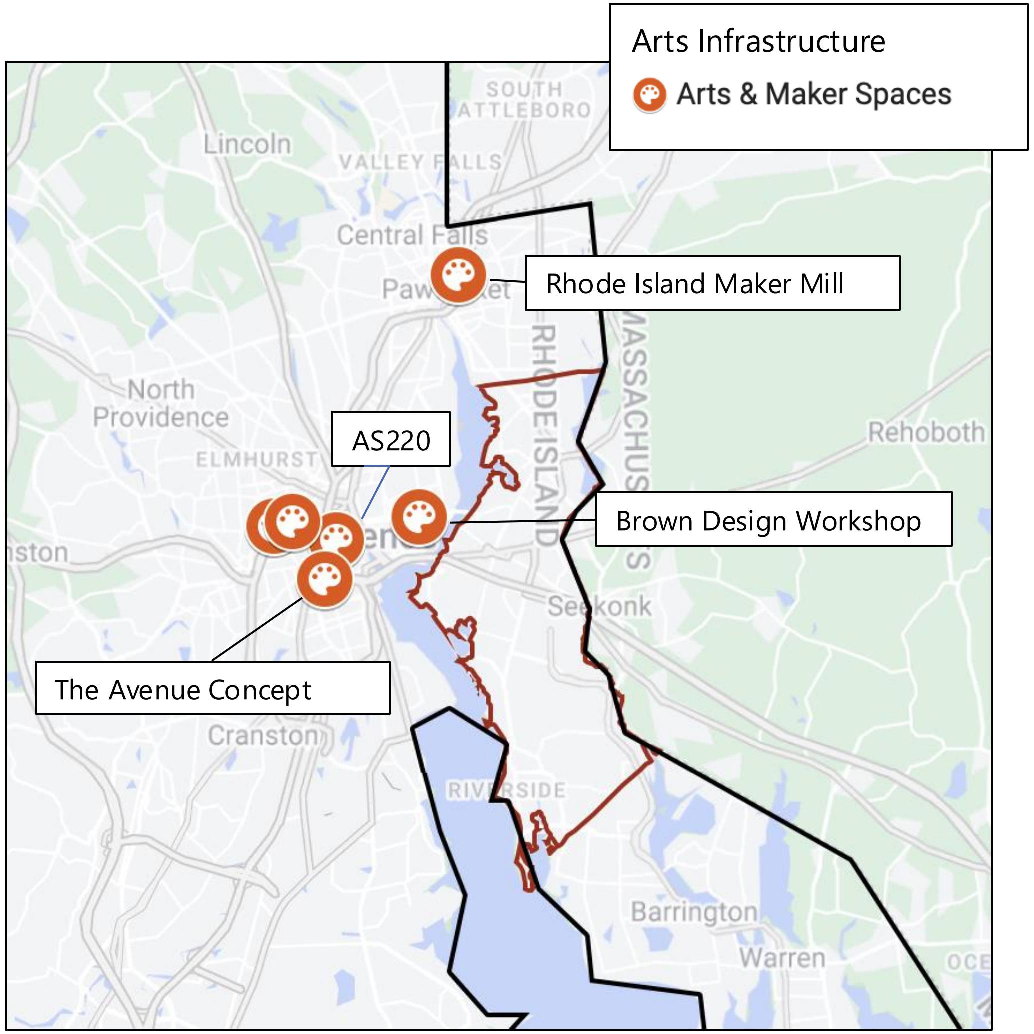
Industry Landscape
Stakeholder Input
Arts Spaces
Maker Spaces
Summary of Findings

ARTS & MAKERS INDUSTRY LANDSCAPE

Although the arts sector is not a top employer in Rhode Island, **entrepreneurship is growing**. The number of self-employed independent artists, writers, and performers grew by over 5,053 from 2020 to 2021.

The research identified six existing arts and maker spaces in the region, none located in East Providence.

There is currently **no theater space** in East Providence; participants emphasized that many non-profits and cultural groups either rehearse at their homes or in church spaces and often perform in other cities due to a lack of local infrastructure for this purpose.



ARTS & MAKERS INDUSTRY INPUT

Feedback on the arts and maker sector was gathered through five stakeholder interviews and 23 survey responses.

Many survey respondents work in a variety of modalities. The business types most represented include

- vocal and performance art
- painting or illustration
- digital or multi-media arts
- music

Arts sector businesses are small; 62% of surveyed businesses in this sector earn less than $25,000 per year.

Arts sector businesses cite **a lack of space to engage with the general public**, **high costs of business**, and **a lack of production space** as their top challenges.

Select the option that best describes your business or the type of business you will be launching (Q6, Q15)

Type of arts/maker business	Total	%
Vocal or performance art	5	22%
Painting or Illustration	5	22%
Digital or multi-media arts	5	22%
Music	5	22%
Woodworking or furniture-making	3	13%
Audio or visual production	3	13%
Clothing, fiber, or textile art	2	9%
Other craft items	2	9%
Writing	2	9%
Ceramics or glass	2	9%
Mechanic	2	9%
Sculpture	1	4%
Industrial design	1	4%
Photography	1	4%
Metalworking or welding	1	4%
Construction or carpentry	1	4%
Jewelry	1	4%
Electrician	1	4%
Other	5	4%
Total respondents	**23**	

ARTS SPACES

Interviewees identified a strong need for additional space to support arts organizations and artists.

In the survey, **19 arts industry respondents** expressed interest in utilizing space at Oldham.

Specific needs highlighted by both groups include

- art gallery space
- musician practice rooms
- rentable studio spaces
- theater space, including a 300+seat auditorium, greenrooms, and storage
- shared equipment, cost-sharing, and tool/equipment rental

What type of space(s) do you need? (Q24)

Space Needed for Arts/Maker Businesses	Total	%
Workshop space - for hands-on trades or maker activities	10	56%
Classroom or instructional space	9	50%
Event space	8	44%
Art gallery - for exhibiting work	6	33%
Retail space - for selling finished products	6	33%
Studio space - for individual or collaborative creative work	5	28%
Sound-controlled practice space - for music, performance art, or related field	5	28%
Performance space - for music, performance art, or related field	5	28%
Kitchen space - for preparing beauty or household items	4	22%
Storage space (materials, flat drawing storage, upright painting storage, sculpture, etc.)	4	22%
Computer lab - for individual or collaborative technology-based work	2	11%
Office or co-working space	2	11%
Other	2	11%
Photography darkroom - for photo production	1	6%
Outdoor space - for large-scale or outdoor projects	1	6%
Total respondents	**18**	

MAKER SPACES

Participants highlighted that a maker space could support **innovation, collaboration, and production across industries** – including welding, metal fabrication, food innovation, 3D printing, podcasting, and blue tech development.

Most surveyed arts and maker entrepreneurs would prefer a **private or semi-private space**, such as a private room or a portion of a shared room reserved for their business.

What type of equipment do you need access to? (Q26)

Equipment Needed for Arts/Maker Businesses -- select all that apply	Total	%
Basic tools and supplies (brushes, easels, etc.)	9	56%
Audio/visual equipment (cameras, projectors)	5	31%
Heavy machinery (woodworking, metalworking)	4	25%
Digital fabrication equipment (3D printers, laser cutters)	4	25%
Digital design equipment (computers, scanners)	4	25%
Ceramics equipment (kilns, pottery wheels)	4	25%
Music production equipment (soundboards, recording space)	4	25%
Cooking or kitchen equipment (stove, steam kettle, sinks)	4	25%
Textile equipment (sewing machines, looms)	3	19%
Specialized equipment (please specify)	2	13%
Total respondents	**16**	

Specialized equipment requested:
- basic electronic testing equipment (soldering equipment and multi-meter)
- bicycle repair stands and tools

What types of space would you prefer? (Q31)

Preferred Spaces by Business	Food Business	%	Arts/ Maker	%	Blue Economy	%	Total	%
A private space that is segmented from other businesses (i.e., a private room)	2	33%	7	39%	1	33%	10	37%
A private area in a shared space (i.e., a reserved area of a shared room)	1	17%	7	39%	1	33%	9	33%
A shared space with other businesses (i.e., shared tables, equipment, storage areas)	3	50%	4	22%	1	33%	8	30%
Total respondents	**6**		**18**		**3**		**27**	

ARTS & MAKERS SECTOR SUMMARY

Interest Level

- High; the market analysis received a strong response from local artists/makers

Space & Service Needs

- private or semi-private arts studios
- art gallery space
- musician practice rooms
- a community theater
- a multi-functional maker space
- limited shared kitchen space
- shared equipment and tools

Limitations & Areas for Further Research

- The survey asked only artists/makers about their level of interest in a maker space (not food/blue economy respondents); additional research may be needed to assess interest across other groups.
- Limited input was received from those working in trades; further research may be required if this audience is a high priority.

BLUE ECONOMY SECTOR

Blue Economy Landscape
Stakeholder Input
Blue Economy Spaces
Seafood Landscape
Stakeholder Input
Summary of Findings

BLUE ECONOMY LANDSCAPE

The blue economy is the **sustainable use of ocean resources** for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystem.

About **6–9% of Rhode Islanders** work within the state's ocean economy, a sector with a direct impact of more than $5 billion.

A 2020 report published by the URI Graduate School of Oceanography recommends that the state develop additional **workforce training programs**, "to develop the required skills and talent to meet growing industry demand, and to enhance the diversity and agility of the state's blue economy."

401 Tech Bridge currently operates three pilot incubators to support businesses in this sector with manufacturing, office, lab, and warehouse space.

Sectors of the Blue Economy	Value	Jobs	Notes
Defense	$3.16 billion	16,011	87% of contracts are federally funded defense activities & industries
Marine trades	$1.45 billion	13,337	Boat building, repair, and retail; diving & marine construction
Ports & shipping	$727 million	2,000	Largest employer is Port of Davisville at the Quonset Business Park, a top 10 North American auto import location
Tourism & recreation	$4.3 billion	83,913	Largest constituents are eating, drinking, hotels, and lodging industries, which employ 32,078 workers
Fisheries	$151.5 million	2,965	Harvesting and processing capacity of the fishing industry
Aquaculture	$5.77 million	194	Most aquaculture in Rhode Island takes place in the Salt Ponds
Offshore wind	TBD	300+	Orsted- own and operate Block Island Wind Farm and the Revolution Wind project

Although few blue economy companies are currently located in East Providence, ProvPort's exclusive port operator and manager, **Waterson Terminal Services,** announced in 2023 they have executed a lease to develop and operate the undeveloped port project located at East Providence's South Quay.

Sources: Commerce RI, The Value of Rhode Islands Blue Economy, 2020; City of East Providence, *ProvPort Executes Lease to Develop and Operate East Providence Port Project*, November 29, 2023.

BLUE ECONOMY INPUT

Blue economy input was gathered through nine stakeholder interviews and four survey responses.

Interviewees emphasized that the blue economy is still a **new and emerging industry**, although they see a lot of potential for growth in this industry in Rhode Island. Many believe that residents who do not work in this industry do not clearly understand the industry or how they could engage with it.

Numerous efforts are underway to support blue economy businesses; however, interviewees are **supportive of additional spaces and programs**. The industry's main focus is “clustering,” developing a large concentration of businesses locally that can work together to support the entire supply chain.

Only two of the blue economy survey responses were from existing businesses, which were among the largest businesses that responded. One earned between $500,000 and $1 million annually, and another earned between $2.5 million and $5 million.

Those two businesses cite **sourcing/supply** and **general labor challenges** as their most significant challenges.

Interviewees also mentioned that the blue economy has had some challenges securing federal **funding**.

BLUE ECONOMY SPACES

Since Oldham is not located directly on the water, some respondents expressed that it may not be ideal for many blue economy businesses.

In the survey, three current and aspiring business owners expressed potential interest in accessing space at Oldham. They are primarily seeking **outdoor space** or **office space**.

Interviewees ideated that the facility could provide wet labs, a biotech incubator, warehouse space, or flexible innovation space.

What type of space(s) do you need? (Q30)

Space Needed for Blue Economy Operations	Total	%
Outdoor space – for fieldwork or testing	2	67%
Office space – for administrative tasks (shared or private)	2	67%
Indoor lab space – for research and development	1	33%
Workshop space – for hands-on projects or prototyping	1	33%
Classroom or instructional space	1	33%
Training space – to train others in job skills or upskilling	1	33%
Storage space	1	33%
Total respondents	**3**	

What type of equipment do you need access to? (Q32)

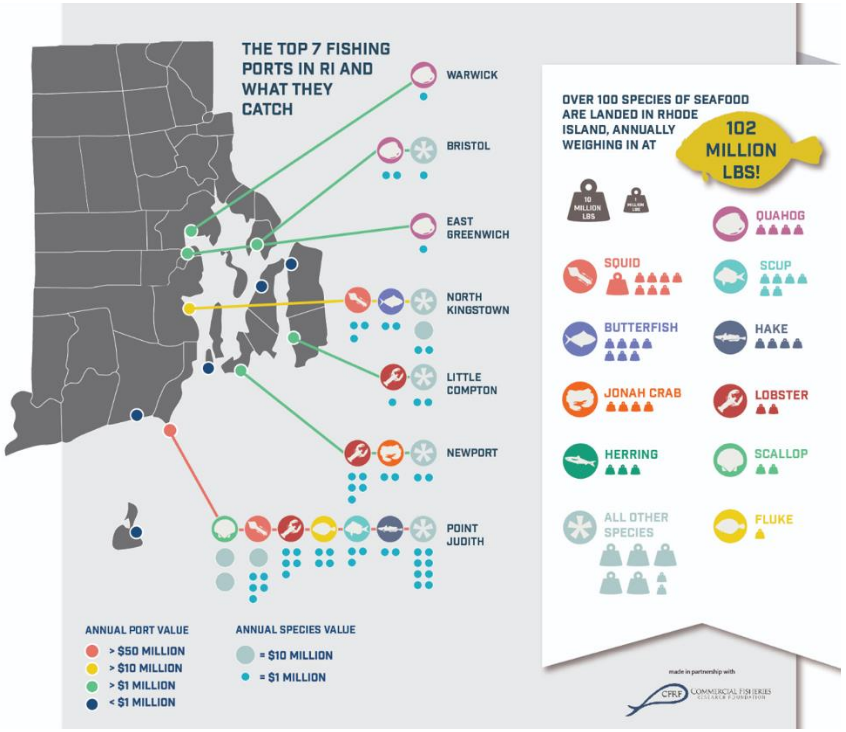
Blue Economy Equipment Needed -- select all that apply	Total	%
Workshop tools (saws, drills, welding equipment)	2	67%
Basic lab equipment (microscopes, lab benches, etc.)	1	33%
Marine research equipment (sampling devices, etc.)	1	33%
Not sure	1	33%
Total respondents	3	

SEAFOOD LANDSCAPE

Commercial seafood landings in Rhode Island **decreased 19%** from 2022 to 2023.

- Fisheries have been hit hard by fish catch quotas and restrictions, impacts of climate change, and offshore wind farm development

The top three commercial seafood species caught in Rhode Island are **sea scallops**, **squid**, and **quahog.**



Top Commercial, Wild Harvest Species Landed in Rhode Island

Common Name	Pounds	2023 Dollars (Million)	Decrease from 2022
Sea scallop	26,258,836	$25.7	30%
Longfin squid	1,015,260	$12.7	33%
Illex (squid)	4,433,219	$3.2	30%
American lobster	1,093,229	$7.7	10%
Summer flounder	2,249,978	$5.86	2%
Quahog	15,394,303	$4.0	9%
Jonah crab	2,480,386	$3.6	10%

Point Judith is the largest port in Rhode Island, landing 44.7 million pounds of fish annually.

- Ports Warwick and Bristol, which are closest to East Providence, landed less than 1 million pounds of fish in 2023*

There are **11 seafood processors** operating in Rhode Island employing approximately 215 people

- 7 of the processors specialize in finfish and squid; the other 4 specialize in shellfish

Sources: University of Rhode Island, The Economic Impact of Rhode Island's Fisheries and Seafood Sector, 2016; Rhode Island Annual Fisheries Report, 2023
*No data available for East Providence

SEAFOOD INDUSTRY INPUT

Despite efforts to reach the seafood industry, only one organization in the seafood industry was engaged through interviews, although several interviewees could speak generally about the industry.

Through these conversations, it was mentioned that any seafood processing space would need ice and wastewater processing, but **a clear need for additional seafood processing space was not identified.**

There is interest in additional education and training, including

- introductory trainings to raise public awareness on local fish species and how to cook with them
- boat mechanics
- boat captain training

BLUE ECONOMY SECTOR SUMMARY

Interest Level

- Moderate; Rhode Islanders are enthusiastic about supporting this industry's growth, especially with workforce development, but few potential business tenants were identified
- No interest was identified from the seafood/fish processing sector

Space & Service Needs

- outdoor space
- office space
- potential demand for wet labs, biotech incubation, warehouse space, shared innovated space

Limitations & Areas for Further Research

- Although blue economy interviewees provided some input on the best use of the facility, survey responses were limited and only identified three possible users of the space.

FACILITY SPACES

Multi-Purpose Spaces
Coworking Landscape & Input
Community Access Spaces
Other Spaces Summary

MULTI-PURPOSE SPACES

Most respondents **did not anticipate conflicts** serving multiple industries out of the same facility or providing public access to the space. A few respondents raised the following concerns and suggestions:

- Chemical or environmental hazards must be kept away from food businesses
- Some trades and maker activities must be kept separate for safety reasons (welding, automotive, and kilns)
- Blue economy businesses may require separation from other companies if they work with proprietary information
- The fishing industry is concerned about the offshore wind industry's impact on their activities
- Some tenants may need quiet space; public access could be a distraction
- Business supplies must be secured and not accessible by the public
- Food and arts businesses could collaborate to develop a "dinner and a show"

COWORKING LANDSCAPE & INPUT

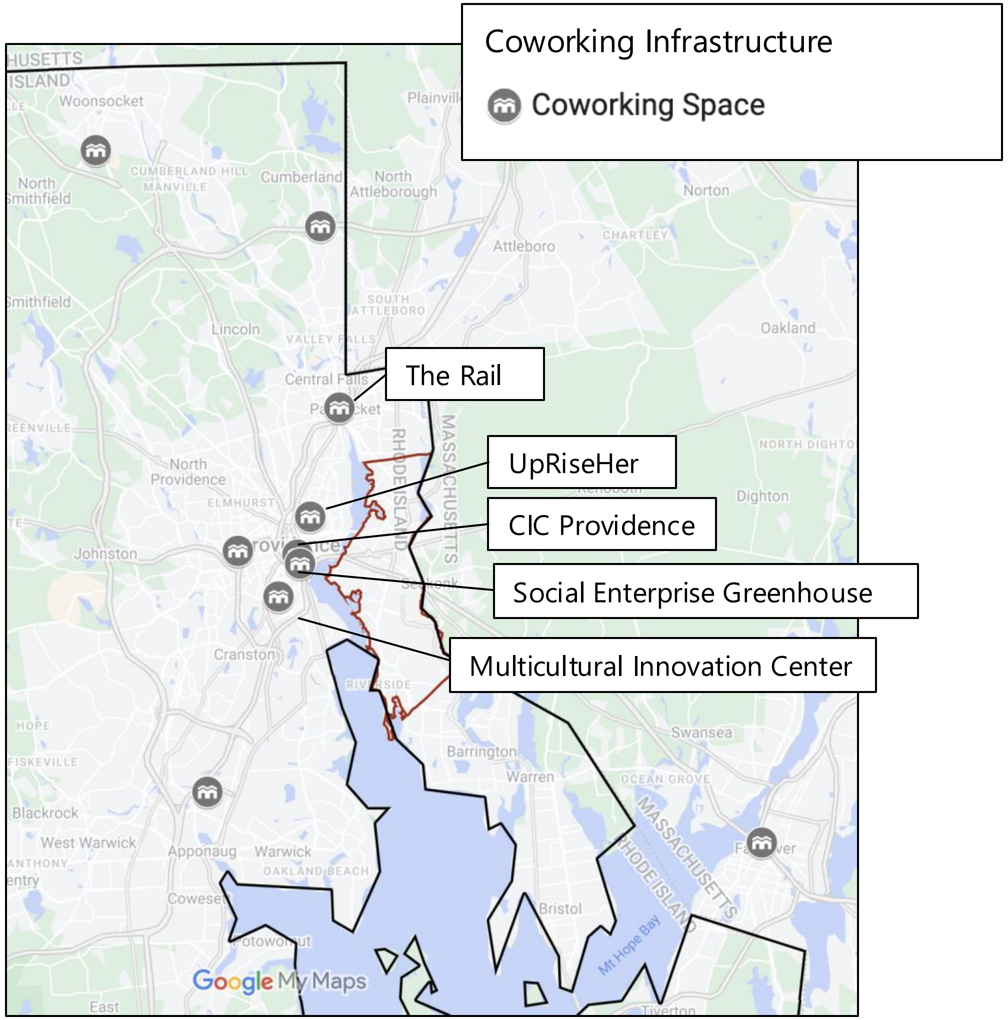
Thirteen coworking spaces were identified in the region.

Although none of these coworking spaces are located in Rhode Island, **interviewees were skeptical about the need for additional coworking space** in East Providence.

Five respondents to the survey said that they would like to see co-working or shared office spaces at Oldham.

Four respondents – two in the blue economy and two in the arts sector – stated they would look to use office or coworking space for their business.

Interviewees mentioned that **affordability** and **robust programming** would be critical aspects of a successful coworking space.



COMMUNITY ACCESS SPACES

There is a strong interest in incorporating community access spaces into the site. Prioritized spaces include an **art demonstration space,** an **event space**, a **gallery space**, a **performance space,** a **community garden**, and a **gym or recreation center.**

Other suggestions by survey respondents and interviewees include

- a cooperative bicycle repair and education space, providing people in the community with access to bicycle tools, spare parts, and expert help to tune up and maintain their own bikes
- an outdoor ice skating rink
- affordable housing
- a food pantry or registration site for food benefits (SNAP/EBT)
- a farmers/makers market for vending and workshops

What other spaces would you like to see included in the redevelopment of Oldham School? (Q49)

Other Spaces	Total	%
Arts demonstration space or "teaching" space	15	63%
Event space	15	63%
Gallery or exhibit space	12	50%
Performance space (music, vocal, performance art, dance)	12	50%
Outdoor space for community gardens	11	46%
Gym or recreation center (basketball, yoga, dance)	10	42%
Digital media studio (video/audio/podcast recording and editing; graphic design)	9	38%
Outdoor green spaces/sports areas (pickleball, bocce)	9	38%
Meeting space or conference room	8	33%
Demonstration kitchen or "teaching kitchen" space	8	33%
Café	7	29%
Viewing space (movies, films)	6	25%
Community gathering space	6	25%
Innovation lab or shared space (science-based activities)	5	21%
Shared officing or co-working space	5	21%
Computer lab	3	13%
Other: Outdoor ice skating behind gym	1	4%
Total respondents	**24**	

OTHER SPACES SUMMARY

Interest Level

- Offices/coworking: moderate; a few potential office users were identified, but the coworking space is well served regionally
- Community spaces: high; respondents were enthusiastic about the inclusion of spaces to support community activities and local nonprofits

Space & Service Needs

- public-access arts spaces, including an arts demonstration space, a gallery, and/or a performance space (theater)
- a multi-functional event space
- a community garden
- recreational spaces, such as a gym, basketball court, and/or ice skating rink
- café and demonstration kitchen
- limited office space for businesses, nonprofits, and government agencies
- affordable housing
- childcare facilities
- bicycle shop

Limitations & Areas for Further Research

- Community feedback must be gathered to prioritize community spaces for inclusion in the facility.

PROGRAMMING

Programming Landscape
Business Programming Input
Community Programming Input
Workforce Development Input
Potential Partnerships
Programming Summary

PROGRAMMING LANDSCAPE: GENERAL

Numerous business development, workforce development programs, and community education programs serve Rhode Island.

Interviews identified interest in additional programs on

- **business growth and development**
- **mentorship** and **financial planning support**, particularly for food businesses
- **workforce readiness** for youth and adults

Existing Programs Identified (Per Training Area)

Business development	- Polaris MEP: business mentorship, financing, pitching - Social Enterprise Greenhouse: business incubation and acceleration - SBDC: business training, office hours, Spanish language programming - Rhode Island Black Business Association: business start-up assistance - Center for Women and Enterprise: business workshops, webinars, and online courses - Skills for the Future: skills training, small business resource hub - Venture Café: small business support - EforAll: business accelerator
General technical skills	- Polaris MEP: manufacturing, manual production lines, supply chain design – aimed to support small to medium manufacturers - East Providence High School CTC: automotive technology, construction technology, electrical technology
Workforce readiness	- Boys and Girls Club: resume writing, job readiness - American Job Center: resume assistance, career counseling - Woonsocket Education Center: entry-level workforce readiness program

PROGRAMMING LANDSCAPE: INDUSTRY-SPECIFIC

Many programs also support workforce and skills development in the food, blue economy, and arts sectors.

Interviewees identified a need for more training for

- **skilled trades**, such as welding, plumbing, electrical, construction, woodworking, and landscaping
- **food industry training** outside of food safety and hospitality, such as retail or supply chain management
- **blue economy skills** that are underserved, such as captain training or boat-building

Existing Programs Identified (Per Training Area)

Food industry	- East Providence High School CTC: culinary arts - Polaris MEP: manufacturing - Education Exchange: oyster farming, ServSafe, hospitality programming - Southside Community Land Trust: farmer training, landscaping, ServSafe, value-added processing - Center for Southeast Asians and RI Hospitality Association: ServSafe - SBDC: hospitality training - Amos House: culinary education, ServSafe - Branch Food: second-stage food business innovation, mentorship, strategic advising, and angel investing - Genesis Center: culinary education
Blue economy	- Polaris MEP: manufacturing - Rhode Island Department of Labor: offshore wind training, blue/green economy workforce training - Education Exchange: oyster farming, sea captain training - V2 Subsea: GIS training, computer training, yacht restoration - Community College of Rhode Island: offshore wind training - Waterson Terminal Services: workplace safety, OSHA, forklift training - 401 Tech Bridge: business acceleration, entrepreneurship support in blue economy - Commercial Fisheries Center of Rhode Island: commercial fishing training, apprenticeships - SeaAhead: blue economy start-up incubation - Westerly Education Center: maritime electrical, sheetmetal, pipefitting, and paint - Rhode Island Marine Trades Association: marine trades workforce development programs - IRYS School of Technology & Trades: trade programs including boatbuilding, marine woodworking, and marine systems
Arts & makers	- East End Theater: performing arts training for kids and adults - HeARTspot Art Center and Gallery: arts classes for kids and adults - AS220: arts and maker workshops - Brown Design Workshop: workshops on woodworking, metalworking, sewing, laser cutting, 3D printing, and electronics - The Steel Yard: courses and educational programs in blacksmithing, welding, jewelry, foundry, and ceramics - Fab Newport and PVD Young Makers: experiential STEAM learning primarily for 11-19 year olds

BUSINESS PROGRAMMING INPUT

Eighty-five percent of survey respondents are interested in participating in business development training.

Several organizations interviewed that currently offer business incubation and business development programs expressed interest in leading this programming.

Business incubators and accelerators typically offer a range of training and support programs. Which of the following would you be interested in? (Q46)

Training and Support Programs -- select all that apply	Total	%
Business start-up (registration, licensing)	12	44%
Business growth, scale or expansion	10	37%
Grant writing, funding development, financing (for start-up or growth)	10	37%
Business planning	9	33%
Accounting and financial management	9	33%
Marketing and branding	9	33%
Small business networking	9	33%
Audience/customer development or differentiation	9	33%
Pricing	8	30%
Specialized regulatory needs, labeling, licensing, or patents	7	26%
Legal access or expertise	7	26%
Labor development (specialized skill training, upskilling)	6	22%
Food safety	6	22%
Working with investors, private equity, venture capital, or related funding strategy	6	22%
Labor management (hiring, scheduling)	5	19%
Quality control	3	11%
Selling your business (future planning)	1	4%
Technical assistance	1	4%
Other	1	4%
Not interested	4	15%
Total respondents	**27**	

COMMUNITY PROGRAMMING INPUT

Survey respondents also expressed interest in **hosting classes, arts events, community gatherings, performances, and cultural events** at the site.

Interviewees recommended that the building be used to host adult activities and clubs as well as drop-in programs for teens, such as workforce readiness workshops.

Would you be interested in hosting any of the following types of events? (Q50)

Interest in Hosting Events	Total	%
Classes or trainings	13	62%
Art-related events and/or openings	9	43%
Public events or community gatherings	9	43%
Musical or performance events	8	38%
Cultural event or offering	7	33%
Private events or parties (family reunions, birthdays, holiday party, etc.)	5	24%
Conferences	4	19%
Lectures or presentations	4	19%
I do not host events / not interested	4	19%
Food demonstrations or cooking events	1	5%
Total respondents	**21**	

WORKFORCE DEVELOPMENT INPUT

Sixty-seven percent of businesses engaged are interested in supporting workforce development, primarily through **mentorship**.

Another goal of this project is to enhance the regional workforce. How would your business be interested in supporting workforce development? (Q47)

Supporting Workforce Development -- select all that apply	Total	%
Offering mentorship	12	50%
Supporting upskilling or advanced skills trainings	7	29%
Creating an apprenticeship or hands-on job training opportunity	7	29%
Hiring employees who are graduates of a workforce training program (externship)	7	29%
Leading a workforce development or skills training program	6	25%
Hiring interns during their enrollment in a workforce training program	6	25%
Helping skilled workers understand how to launch a private business	4	17%
Teaching GED or high-school equivalency courses or programs	4	17%
Offering language support or related services	4	17%
Helping skilled workers understand how to compete for government/specialty contracts	3	13%
Other (please specify)	2	8%
None of the above	8	33%
Total respondents	**24**	

Other (write-in responses):
- Teach soap-making
- We offer built-in workforce development in two of our programs, which lead to employment opportunities in the arts industry (our org) following completion.

WORKFORCE DEVELOPMENT INPUT

A few businesses surveyed provided input on the programs they would like to see.

Hands-on training

Daily, people ask how to make soap…I could make it, sell it, and teach others to make it.

An intentional link between the high school's vocational programs and paths towards entrepreneurship

The [bicycle mechanics] business also involves a great deal of customer service and communication. Individuals who learn the skills to work in a bicycle shop can successfully transfer these skills and experiences to other settings or start on a career path in the bicycle industry.

Visual arts training, including painting

Repair trades training

POTENTIAL PARTNERSHIPS

A number of non-profit organizations and for-profit businesses engaged through interviews and surveys offered to support the Oldham facility by:

- operating a space (incubation, coworking, kitchen, or arts space)
- leading programming for businesses or community members
- offering technical assistance or advisory consulting
- facilitating connections with community members and businesses

Engaging these organizations as key partners in the facility could support their growth, rather than compete with their services, and support the sustainability of the facility.

Further engagement with these organizations to clarify their roles will be a key next step.

PROGRAMMING SUMMARY

Interest Level

- High: there was strong interest in business programming, community programming, and workforce development efforts

Programming Needs

- business start-up and growth
- workforce readiness
- hands-on training for arts, trades, and technical skills that can be used across industries
- community education workshops and events

Limitations & Areas for Further Research

- Although there is interest in additional programming, many programs already exist throughout the state; further conversations are needed to determine how existing programs can be hosted at Oldham.

OPERATING IMPLICATIONS

Spaces
Programming
Next Steps

OPERATING IMPLICATIONS: SPACES

PRIORITIZING INTEREST

- The market analysis identified demand for spaces and programs to support all three industries, but **small artists and makers in East Providence** provided the most direct input from potential users**.**
- **There is community interest, but refining understanding of community needs for access/programs will be essential.**
- A secondary interest was identified from food businesses.
- Although blue economy businesses are supportive of the concept, few direct business users were identified; instead, organizations expressed an interest in supporting workforce development and collaborative opportunities.

BEGINNING TO DEFINE SPACE (INFORMED BY DEMAND)

- Oldham could support interested entrepreneurs and non-profits in a site that could be positioned as a **multi-use maker space and community space:**
  - **shared kitchen space** for food and non-food businesses
  - **flexible (private or shared) studios** that could be used for creative arts, music practice, gallery/exhibition, or retail
  - **specialized (shared) workshop spaces** for activities such as welding, ceramics, or woodworking
  - **multipurpose event space** and/or space to support a community theater, cooperative bicycle shop, community garden, or recreational facilities
  - a **classroom space** for business and community programming
  - **larger (private) spaces** for a small group of anchor tenants

OPERATING IMPLICATIONS: PROGRAMMING

WORKFORCE FOCUS TO PROGRAMMING

- There is a strong interest in **business programming** and the potential to partner with existing organizations that are already specialized/capacitated to offer programs with this focus in this space.
- All sectors (but especially the blue economy and food industries) need labor. Utilizing the facility to **offer workforce development, hands-on skills training, and upskilling training** can substantially engage these industries (and support community members).
- Tenant businesses could **support workforce development (and offer community education) through mentorship, hands-on skills training,** and **hands-on workshops/demonstrations**.
- A workforce development program that could **support the development of general skills that support multiple industries** might be the most appropriate complement to a community-focused maker space (and could support upskilling).

TO DO

- Re-engaging interested organizations in subsequent process steps will be critical to aligning the programming and design of spaces.
- Further engagement of the community will support an understanding of what hands-on skills training should/could offer.
- Identifying jobs with growth opportunities and livable wages will be important in structuring programming.

OPERATING IMPLICATIONS: NEXT STEPS

Community Engagement – Feedback into Space and Programs

- Before developing an operating model, it is **strongly recommended that the project team gather feedback from residents on their preferences for the spaces and programs** to incorporate into the facility.
- **This could take the shape of a community meeting.**
  - Sharing a high-level synopsis of the "shape" of what we are developing with examples of other facilities offering those spaces/programs
  - Offering opportunities to rank spaces, programs, options (activities)
  - Offering opportunities to share feedback/concerns

Operating Model:

- Refine program partner needs: to refine the understanding of these program offerings and pricing models, additional relationship development with potential partners around workforce and skill training offerings will be needed
- Prioritize user access across each potential space/program, so we can refine regulatory, safety, and access scenarios for the facility.

Financial Model:

- **Affordability will be critical for all users** - identifying anchor tenants may help the facility operate sustainably and offer subsidized or discounted pricing for small businesses, non-profits, and community users

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