



# Burlington Downtown Improvement District Phase 1 Assessment

PREPARED BY:

Progressive Urban Management Associates

August 2018

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# PROJECT INTRODUCTION

The City of Burlington, Vermont, is set on the eastern shore of Lake Champlain, 45 miles south of the Canadian border. The largest city in Vermont, with a population of approximately 42,000 residents, it is an important and well recognized regional hub and central place for commerce, housing, education, industry and government. Downtown is the heart of Burlington with celebrated local character, arts and culture, the famed Church Street Marketplace, and waterfront amenities.

Downtown Burlington has two separate management districts, the Church Street Marketplace (CSMP) and the Downtown Improvement District (DID), which is shown in the map on page 5. While CSMP provides a number of services along the 4-block pedestrian mall, the DID's scope is limited by the city charter to a parking program. Progressive Urban Management Associates (P.U.M.A.), was contracted by the Burlington Business Association (BBA), a nonprofit 501 c 6, in partnership with the City of Burlington, to evaluate the existing downtown management framework and assess the feasibility of a full service DID. P.U.M.A. is a place management consultancy, with 25 years of national experience, specializing in improvement districts for downtowns.

This project is being funded by DID funds through a cooperative agreement between the BBA and the City of Burlington Department of Public Works Traffic Fund<sup>1</sup>.

## PROJECT APPROACH

The following describes the approach taken by P.U.M.A. to complete a Phase 1 feasibility assessment for a full service DID in downtown Burlington.

### Project Orientation

At the start of the project, P.U.M.A. reviewed past plans, legislation and other background documents pertinent to the scope of work. See plan reviews on pages 8-9. P.U.M.A. then made an initial site visit to become acquainted with downtown Burlington, the client team, and other key stakeholders.

### Outreach

P.U.M.A. conducted three site visits between February and June, 2018. Facilitating stakeholder outreach was a main component of each of these trips, consisting of focus groups, one-on-one meetings, and meetings with boards, commissions and elected officials. Simultaneously, an online survey was widely distributed. See outreach summary on pages 10-14 and the full online survey summary in the Appendix.

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<sup>1</sup> DID funds are collected from commercial properties within the district via their annual property tax bill and then assigned to the City of Burlington's Department of Public Works Traffic Fund.

## Case Studies

Three case studies of management organizations in downtowns comparable to Burlington were conducted. P.U.M.A. specifically sought small to mid-sized downtowns with business improvement districts and a pedestrian mall. Case studies included Santa Monica, CA, Boulder, CO, and Ithaca, NY, which can be found on pages 15-21.

## Implications

Based on findings from site visits, stakeholder outreach, case studies, and feedback from the DID working group and DID advisory committee, P.U.M.A. drew conclusions as to the best management model for downtown, which is outlined on pages 23-24.

## Alternatives Assessment & Preferred Model

P.U.M.A. then explored in more detail three alternative governance models that can be found on pages 26 -28, along with a preferred model recommended on page 29. P.U.M.A.'s recommendations were informed by decades of experience working with many types of improvement districts in downtown markets throughout the country.

# EXISTING DOWNTOWN ORGANIZATIONAL FRAMEWORK

## Downtown Improvement District

### Overview

The Downtown Improvement District (DID) was formed in 1999 by charter change legislation<sup>2</sup>. In response to fears of downtown losing visitors to suburban locations with easy and ample free parking it was established that the DID fee would be used for a parking program that includes no less than two hours of free parking in designated downtown garages.

### Services

The charter language states explicitly that the revenues from the DID be utilized for "a parking program that includes not less than two hours of free parking for anyone in any designated municipally or privately owned or operated parking garage or parking lot located within the DID." Currently two-hour free parking is offered at all three downtown municipal parking garages: College St., Lakeview, and Marketplace. The fee collected from DID feepayers supports the cost of providing a two-hour free parking program, although according to the City's Department of Public Works, the DID fee only offsets a portion of the cost.

### Governance

The annual fee for the DID is recommended by the Church Street Marketplace Commission and approved by City Council.

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<sup>2</sup> <https://legislature.vermont.gov/statutes/chapter/24APPENDIX/003> subchapter 7, 3-321 – 3-325

## Staff

The DID has no dedicated staff. The DID fee is collected from commercial properties within the district, that are not owned by non-profit or governmental organizations, via their annual property tax bill and then assigned to the City of Burlington's Department of Public Works (DPW) Traffic Fund.

## Operating Budget

The DID's projected collection for 2019 is \$307,355.

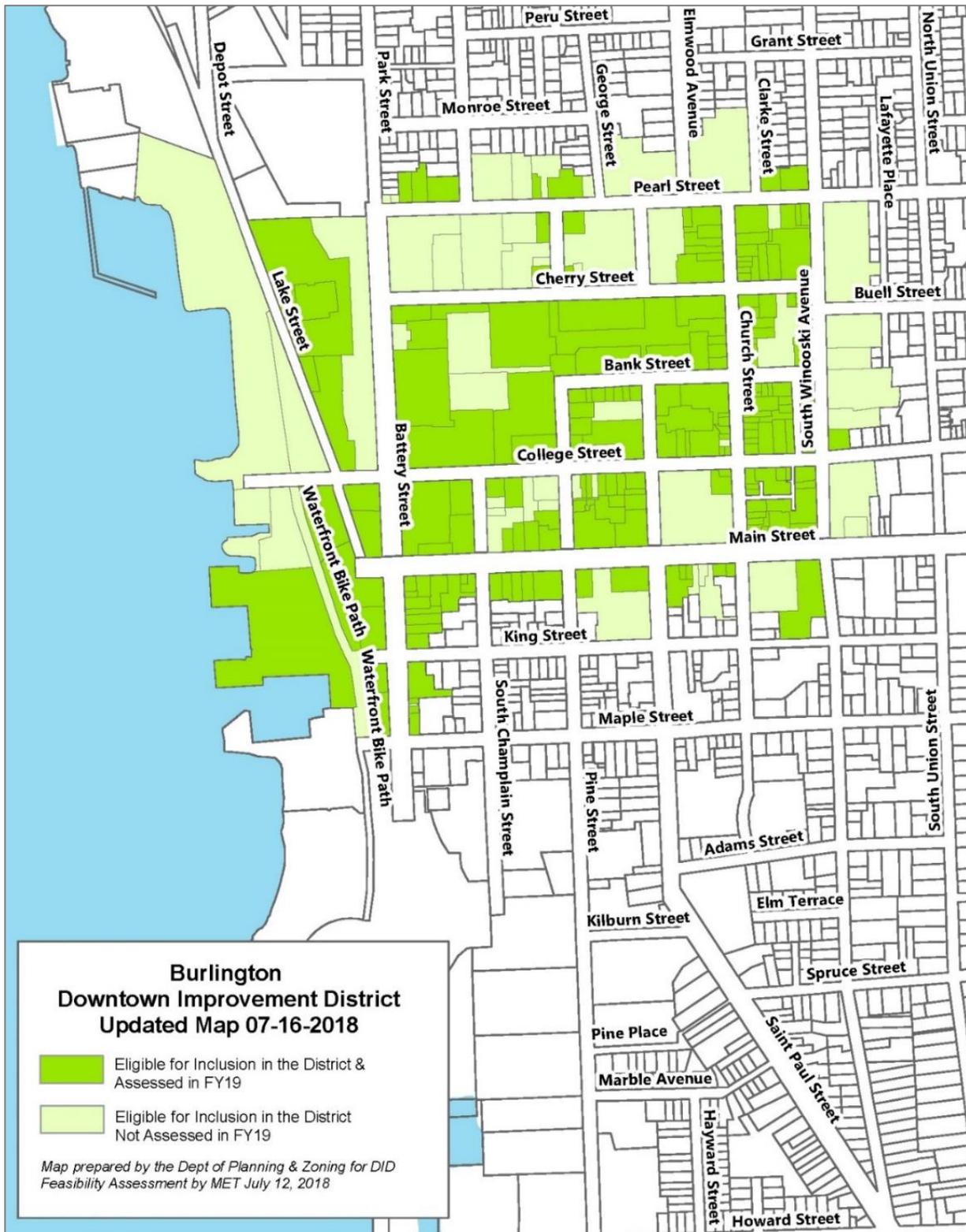
## Assessment Methodology (Fee)

Commercial properties in the DID, that are not owned by non-profit or governmental organizations, pay an assessment of \$0.09 per hundred in assessed value, with a cap of \$0.12 but no floor. The map on the following page shows which properties in the DID are assessed and which are not.

The DID fee is assigned to the City's DPW Traffic Fund, which is restricted in its use and does not support the general fund.

## Boundary

As shown on the following page, the DID is bound generally by Pearl Street to the north, South Winooski Street to the east, Main Street and Maple Street to the south and Lake Champlain to the west. The DID boundary encompasses the CSMP District.



<sup>3</sup> Darker green represents commercial properties within the DID that are assessed. Lighter green represents residential or commercial properties owned by non-profits or the government that are exempt from assessment but still included within the DID.

# Church Street Marketplace

## Overview

Church Street Marketplace (CSMP) is a downtown improvement district that spans a four-block pedestrian mall along Church Street between Pearl and Main Streets. It was created in 1981 in response to growing suburban sprawl and a desire by downtown stakeholders to maintain the downtown as the cultural, commercial and community center for the region. CSMP is by many measures a thriving district, with many local, unique retailers, eating and drinking establishments and well as some national brands.

## Services

Services provided by the CSMP include:

- General maintenance
- Marketing and events
- Programming
- Permits and Licensing issued for:
  - Outdoor cafes
  - Cart vendors
  - Sidewalk obstructions
  - Parades/vigils/rallies
  - Non-profit tabling
  - Street performers
  - "Artists in the alley" program
- Research and annual reports:
  - Downtown Customer Origin Surveys (focused on downtown retail)
  - Downtown Food & Beverage Business Survey
  - Downtown Census including square footage by category
  - Downtown Rooms/Meals/Alcohol Sales

The City charter does not allow CSMP to access the City's capital improvements budget nor does CSMP maintain a contingency or operating reserve. CSMP is responsible for funding their own capital improvements. Since the operating budget is not designed to fund significant repairs or improvements, it primarily supports minor upkeep like replacing a broken brick.

## Governance

City Council has the authority and responsibility for management of the CSMP District and has delegated some of this power to the Church Street Marketplace Commission (Commission). City Council appoints commissioners who are responsible for setting policy for CSMP and recommending the annual common area fee and budget, which is ultimately approved by Council. The Commission is made up of nine members that represent business owners, property owners and residents in the CSMP and DID.

## Staff

CSMP has five staff consisting of two full time administrative employees, an Executive Director and Marketing Assistant, and three full time maintenance employees. The Mayor appoints the Executive Director of the CSMP. Staff work within a City department called the Church Street Marketplace Department and receive standard city benefits.

## Operating Budget

The Church Street Marketplace Department has an annual operating budget of approximately \$1 million.

## Assessment Methodology

The approximately 30 property owners in the district pay an additional tax, referred to as a common area fee, that funds approximately 70% of services within the district. The common area fee for FY 17 was \$2.90 per square foot of ground floor space fronting Church Street.

Commercial property owners within CSMP, that are not owned by non-profit or governmental organizations, pay both the common area fee and the DID fee.

## Burlington Business Association

The Burlington Business Association (BBA) is an organization that provides member services and advocates on behalf of Burlington's business community both in and outside of downtown. The organization has approximately 260 business members and is governed by a board of up to 20-members comprised of business and property owners, business community leaders and representatives of major institutions.

The BBA was designated as the organization responsible for leading the process of assessing the feasibility of a full-service DID, in part because the organization played a key role in the original creation of the DID, in cooperation with the City of Burlington. The BBA is working in close coordination with the **DID Working Group**, which includes a representative from CSMP, DPW, and the Community and Economic Development Office for the City of Burlington, and the **DID Advisory Committee** on this process. Participants of these groups are listed in the Appendix.

In 2017, the City of Burlington and the BBA developed a partnership agreement enabling the BBA to utilize DID funds to carry out activities defined in the Downtown Parking & Transportation Management Plan.

The BBA's FY17-18 work plan includes tasks under the following seven categories:

1. Downtown Improvement District; assess the feasibility and scope of a full service DID.
2. Transportation Options & System Efficiency; including transportation demand management (TDM) options and improved bicycle parking.
3. Garage Improvements; including repairs and operation and maintenance improvements.
4. On-Street Meter Improvements; including meter restructuring and a pay-by-phone pilot.
5. Communication, Online Tools & Promotions; to better communicate parking and transportation information to the public, including branding, a website and an app.
6. Data Collection; to acquire parking utilization data.
7. Support Downtown Parking & Transportation Council (DPTC); help to convene and facilitate DPTC meetings.

A similar scope of work was recently approved for the BBA's FY18-19 work plan.

# PAST PLAN REVIEWS

Burlington's development has been guided over the past five years by a series of plans, which received extensive input from the community. The plans summarized in this section aim to craft a collective community vision for the future of Burlington and to strengthen its ability to continue to be a livable, affordable, and vibrant community. planBTV Downtown and Waterfront is of particular relevance to this report as it supports the notion of a downtown-wide DID.

## planBTV

### Downtown & Waterfront (adopted 2013)

<https://www.burlingtonvt.gov/planBTV/DW>

planBTV is a bold, action-oriented plan that reads like a magazine. The plan's goal was to refine broad citywide goals for sustainable development into focused, actionable, area-specific strategies to ensure the vitality of Burlington's downtown. Following two years of public process, research, and more than 100 public events, the City Council unanimously adopted planBTV in 2013. **planBTV calls for the creation of a downtown wide DID as well as a parking management district.**

#### THE TOP 5 ISSUES IDENTIFIED BY STAKEHOLDERS:

1. Promote a local economy that is sustained by a diverse mixture of business opportunities
2. Strengthen role as a regional population and economic center
3. Provide an integrated transportation system
4. Encourage the creation of a wide range of housing opportunities
5. Promote new and infill urban development

Additionally, planBTV set the stage for the redevelopment of Burlington Town Center, now referred to as CityPlace, which will include at least 270 additional housing units at a range of income levels, over 230,000 sq. ft. of office space, over 126,000 sq. ft. of new retail space, parking and public improvements. Importantly this project will enable the re-opening of St. Paul and Pine Streets between Cherry and Bank Street to reconnect the street grid. A broad coalition of community organizations and local businesses supported the redevelopment vision for the property.

### Downtown Code (adopted 2017)

<https://www.burlingtonvt.gov/planBTV/FBC>

A form-based code (FBC) that applies to downtown and the waterfront was adopted November 2017. The goal was to streamline the permitting processes and expand opportunities for downtown infill development. Flexibility is built into the code through administrative relief, design review relief and variances.

### Walk Bike Master Plan (adopted 2017)

<https://enjoyburlington.com/wp-content/uploads/sites/10/2015/11/20016-Plan-BTV-Walk-Bike-Plan.pdf>

Burlington adopted its first Walk-Bike Master Plan in April 2017. Although downtown is relatively compact, connectivity between destinations could be improved. This plan makes recommendations for improving bicycle and

pedestrian conditions and addresses Burlington’s growing demand for safer streets. Many of the top 20 priority safety intersections are within downtown and the waterfront.

## **Downtown Parking and Transportation Management Plan (adopted 2015)**

<https://parkburlington.com/wp-content/uploads/2015/12/Downtown-Parking-Transportation-Plan-Final-Draft-V.5.pdf>

This plan takes a comprehensive, big picture, approach to parking and transportation in downtown Burlington. It shifts thinking of parking as a base utility to considering parking and transportation access as a mechanism for community and economic development. Key recommendations from the study included employing new technology – such as a mobile parking app and credit card meters – to improve the customer experience, coordinating transportation solutions for employees, capital improvements to garages with a focus on cleanliness and safety, and preserving 2-hour free parking in the Lakeview and College Street garages but removing it from Marketplace garage and instead offering a downtown-wide merchant validation program for discounted parking.

## **Great Streets Initiative (adopted 2015)**

<http://greatstreetsbtv.com/>

The Burlington Great Streets Initiative,“ builds upon past plans and community vision for great streets and attractive public spaces downtown. Great streets are walkable, bikeable, sustainable, vibrant and functional. The Initiative is focused on three interrelated efforts:

- Downtown Street Standards – essentially a menu of urban elements that are beautiful, practical, affordable, sustainable, and appropriate for downtown Burlington from Pearl to Maple (north to south) and from Union to Battery (east to west).
- Main Street / St. Paul Street - redesign six segments of Main Street from Union to Battery and two segments of St. Paul Street from Main to Maple based on the downtown street standards.
- City Hall Park – continue efforts to reconstruct this important public space in downtown Burlington, building off of the Imagine City Hall Park design completed in 2011.

## **Burlington Municipal Development Plan – Economic Development Section (adopted 2014) *Currently being updated as required by state statute every 5 years***

[https://www.burlingtonvt.gov/sites/default/files/PZ/planBTV/MDP11\\_pdf/VI\\_Economic\\_Development.pdf](https://www.burlingtonvt.gov/sites/default/files/PZ/planBTV/MDP11_pdf/VI_Economic_Development.pdf)

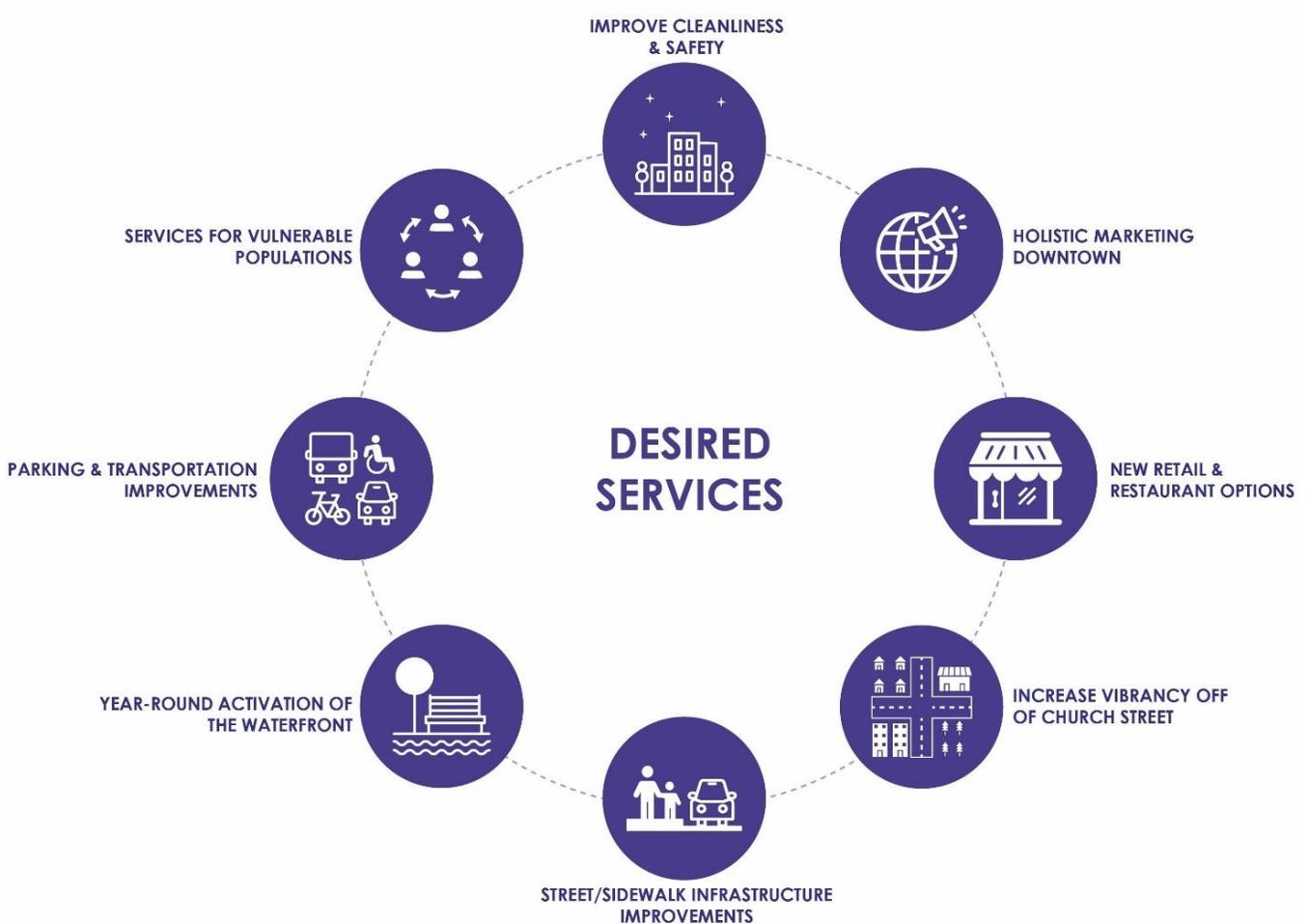
The City of Burlington is a major economic force for the State of Vermont. There are several action items in this plan that pertain to downtown, including:

- Renovation and adaptation of the Moran Generating Plant on the waterfront (which has been attempted but never actualized).
- Establish a Sustainable Development Business Program to provide information, education and resources to the business community regarding making their business practices and processes more environmentally friendly and sustainable ([Burlington 2030](#) was adopted in 2017).
- Develop additional conference and exhibition space within downtown.
- Establish an Arts Information Center in a downtown location (Burlington City Arts now exists on Church Street).

# OUTREACH SUMMARY

Community outreach was critical to understand the needs and desires of downtown stakeholders and determine priorities for enhanced services. P.U.M.A. conducted outreach through a variety of channels including focus groups, one-on-one interviews and an online survey. In total more than 75 stakeholders participated in an interview or focus group and over 1,100 people responded to the online survey. The graphic below illustrates desired improvements among stakeholders that could be provided by an enhanced downtown management organization.

Following this illustration is a more detailed account of priorities among focus group participants and survey respondents.



## Focus Groups Summary

P.U.M.A. made three site visits to Burlington: February 12-15, 2018, Apr. 30- May 3, 2018, and June 4-6, 2018. During each visit input was sought from a variety of stakeholders, including:

- DID Working Group
- DID Advisory Committee
- BBA staff and board members
- City Council
- City staff
- CSMP Commissioners
- Downtown property owners
- Downtown business owners
- Downtown developers
- Downtown employers
- Downtown employees
- Downtown residents
- Downtown young leaders and advocates
- Downtown business leaders

Participants were asked **what would improve Downtown Burlington and the Waterfront?** After generating a list of improvements participants were taken through a priority setting exercise. Each person was given three “votes” to use on their top priorities, which are described below.

### Alternative Transportation Improvements (38 votes)

- Enhanced alternative mobility modes - more walkable/bikeable/transit/gondola
- Improvements to the free college street shuttle – make it circular not linear, connect to key destinations, increase frequency, new creative/fun branding

### Marketing/Branding for Downtown (36 votes)

- Holistic marketing for downtown to let people know what downtown has to offer
- Re-brand downtown especially following new developments

### Streetscape Improvements Off Church Street (29 votes)

- Improve the street/sidewalk condition, lighting, landscaping, design elements, pedestrian feel off of CSMP

### Improve Connections Between Downtown and Waterfront (26 votes)

- Draw people from downtown to the waterfront
- Create improved streetscapes and more services such as retail and restaurants along connecting routes
- Make the route more welcoming and accessible via multiple modes

### Make Downtown Safe and Welcoming (17 votes)

- Ambassador program to provide maintenance, safety and welcoming services

## Heated Sidewalks (11 votes)

## Increase Outreach Services (11 votes)

- Increase outreach/services for transient population; similar to what is provided by the Howard Center
- Help to reduce problem behaviors

## Improve Parking Experience [11 votes]

- More awareness of where parking is located
- Improve safety and cleanliness of garages
- Convenient/affordable parking for employees

## Visitor Information/Wayfinding [9 votes]

- Technology-based visitor information/wayfinding

## Year-Round Activation of Waterfront [8 votes]

- Activate the waterfront with more events and activities during off-peak seasons

## Online Survey Summary

In addition to focus groups, an online survey was administered to gather information from a broad audience about their experience and desired improvements for downtown. The survey ran between April 23, 2018 and June 20, 2018 and received a total of **1,143 responses**. A full survey summary can be found in the Appendix.

### Who took the survey?

24% of survey respondents are downtown employees in the private sector, 21% are downtown residents, 12% are downtown employees in the public sector, 10% are downtown business owners, 4% are downtown commercial property owners, and 2% were students<sup>4</sup>. 62% of respondents identify as female, while 34% identify as male. There was a relatively even age and income distribution among survey respondents.

### How do survey respondents interact with downtown Burlington?

The majority of respondents (63%) interact with downtown Burlington once a week or more.

- Respondents *'Frequently'* visit downtown for:
  - Restaurants (44%)
  - The waterfront park or other downtown parks (40%)
  - Personal services (25%)
- Respondents *'Rarely'* visit downtown for:
  - Religious services (92%)
  - City business (59%)
  - Bars, clubs, and nightlife (57%)

<sup>4</sup> 42% of respondents did not select their connection to downtown, indicating their status as a visitor or that they preferred not to answer.

## What do survey respondents think about downtown Burlington today?

Respondents were asked to select the three most important factors in their enjoyment of downtown and the waterfront. The top factors are:

- Safe streets and public spaces (55%)
- Restaurants and retail (47%)
- Clean streets and public spaces (36%)
- Visiting the waterfront (30%)
- Enhanced mobility (i.e. better connections, improved sidewalks, bike lanes) (20%)

## What do survey respondents think will improve downtown Burlington for the future?

### DOWNTOWN OVERALL

The enhanced services that were selected as most important for improving the overall downtown experience are:

1. Parking and transportation services (43%)
2. Homeless outreach and assistance services (34%)
3. Infrastructure improvements (31%)
4. New restaurants and retail options (31%)
5. Enhanced security services (23%)

### CHURCH STREET MARKETPLACE

The enhanced services that were selected as most important for improving the Church Street Marketplace experience are:

1. New restaurants and retail options (41%)
2. Homeless outreach and assistance services (40%)
3. Parking and transportation services (37%)
4. Infrastructure improvements (26%)
5. Enhanced security services (25%)

### WATERFRONT

The enhanced services that were selected as most important for improving the waterfront experience are:

1. Parking and transportation services (42%)
2. Special events (38%)
3. Maintenance and management of public parks (34%)
4. Activities for people in public spaces (33%)
5. New restaurants and retail options (31%)

### YOUNG VS. OLD

Cross-tabulation of the online survey revealed different priorities for improving downtown from different age groups. Younger respondents (under 34) were most concerned with new restaurant and retail options. Older respondents (over 45) rated improving parking and transportation services as the top priority.



# MANAGEMENT ORGANIZATION CASE STUDIES

Four case studies were conducted to understand best practices in downtown management organizations, for downtowns comparable to Burlington, in particular small to mid-sized downtowns with a pedestrian mall. These three downtowns are also home to a university. Case studies included Santa Monica, CA, Boulder, CO and Ithaca, NY<sup>5</sup>.

## Downtown Santa Monica, Inc.

Downtown Santa Monica Inc. (DTSM) is a 501 c 6 non-profit that manages a property-based assessment district (PBAD), which encompasses approximately 40 square blocks and includes the well-known third street promenade pedestrian mall.

### Programs

- Clean, safe and welcoming ambassadors
- Homeless outreach
- Marketing and events
- Economic development
- Special projects, such as improving parking availability, reducing traffic congestion and urban design elements like streetscape and lighting

### Governance & Staff

DTSM, Inc. has 11 staff and is governed by a 13-member volunteer board of directors. Six board members are elected by downtown property owners and six members are appointed by City Council. One board seat is reserved for the City Manager or designee.

- 9 property or business owners
- 2 residents
- 1 City of Santa Monica representative
- 1 UCLA representative

### Duration

The district was initially set to have a 20-year term. Any subsequent renewal of the District (beyond 20 years) will require a new management plan. Every five years, downtown property owners undertake a review of the Management District Plan and PBAD programs. Any new or increased assessments that are not consistent with the provisions of the Management District Plan require a new mail ballot process.

Downtown Santa Monica Inc.  
501 c 6 non-profit



Property-based assessment district  
(PBAD)



<sup>5</sup> Populations: Boulder: 110,000; Santa Monica: 90,000; and Ithaca: 30,000

## Annual Operating Budget

Revenues 2017		Expenses 2017	
Dollar Amount	Percent of Total	Dollar Amount	Percent of Total
Assessments: \$6,235,739	75%	Maintenance: \$1,958,451	24%
Events: \$989,168	12%	Clean, Safe and Welcoming Ambassadors: \$1,825,068	23%
Other: \$811,689	10%	Marketing/Promotional Branding: \$1,470,469	18%
Parks Ambassadors: \$249,959	3%	Downtown Events: \$931,489	12%
		Management/General: \$679,612	8%
		Economic/Business Development: \$432,311	5%
		Parks Ambassadors Pilot: \$233,955	3%
		Operations: \$216,513	3%
		Special Projects: \$173,499	2%
		Homeless Support/Programs: \$142,826	2%
<b>TOTAL: \$8,286,555*</b>	<b>100%</b>	<b>TOTAL: \$8,063,811</b>	<b>100%</b>

\*Any excess revenue is carried over as an operating reserve/contingency.

### Assessment Methodology

The Santa Monica PBAD has multiple benefit zones, with varying assessment fees. The zones are determined by geography and the level of service provided. Properties on the Promenade (pedestrian mall) pay the highest fee and receive the most frequent and robust service. Annual rates are listed in the table below.

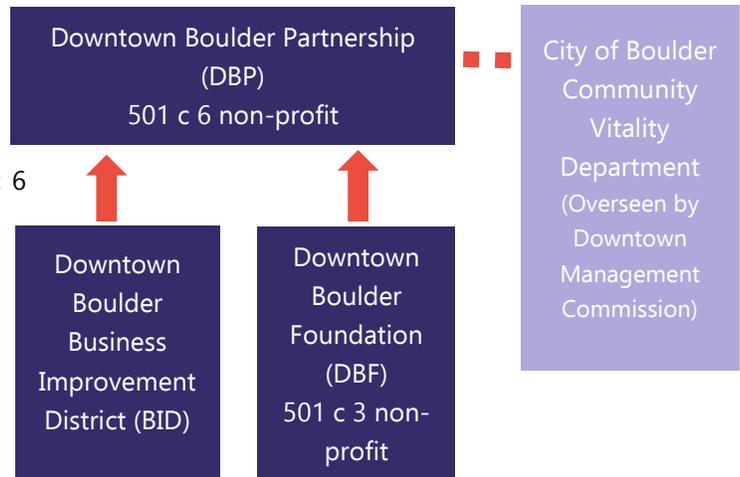
Benefit Zone	Commercial (greater of the lot or bldg. sq. ft.)	Residential & Government (greater of the lot or bldg. sq. ft.)	Non-profit (greater of the lot or building sq. ft.)
Promenade	\$0.962	\$0.681	\$0.342
Bayside/Ocean	\$0.482	\$0.342	\$0.172
Downtown East	\$0.241	\$0.172	\$0.085
Lincoln Boulevard	\$0.393	\$0.339	\$0.170

#### CONTACT

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## Downtown Boulder Partnership

The [Downtown Boulder Business Improvement District \(BID\)](#) encompasses a 49-block area that includes the Pearl Street pedestrian mall. The BID falls under the Downtown Boulder Partnership umbrella organization, which is a non-profit 501 c 6 membership organization. Until recently, there was only the DBP and the BID. A few years ago, a 501 c 3 was formed called the Downtown Boulder Foundation (DBF). This allowed the DBP to remain a 501 c 6, for advocacy purposes, while also having a 501 c 3 charitable organization, which is able to pursue grants and sponsorships. The DBF runs all events for DBP and the BID. The DBP works closely with the City of Boulder and receives some City funding for events, marketing and visitor materials.



### Programs

- Supplemental maintenance services, including trash and graffiti removal, and general downtown security.
- Marketing and promotion of the downtown district, including promotions, advertising, branding, banners, brochures, printed collateral materials, newsletters, public relations, and social media.
- Economic vitality efforts that include market research, “support-local” education, tenant recruitment for both office and retail, as well as support programs for small businesses.

The Pearl Street Mall is considered a City park and maintained by the City of Boulder Parks and Recreation Department. Property owners on the Pearl Street Mall receive enhanced services from the BID, plus, the following from parks staff:

- Flower planting - 58 ground flower beds, seven raised beds, 98 hanging pots and 52 containers.
- Irrigation
- Cleaning every morning - seven days a week
- Trash removal daily
- Graffiti removal
- Furniture and structure repair and maintenance (benches, light poles, bollards, bricks, etc.)
- Water feature care and maintenance
- Snow removal
- Event management
- Customer service

### Duration

The BID was formed with an initial term of 10-years. Upon renewal, it was given a 20-year term, which is set to expire in 2030.

## Governance and Staff

The BID puts out a public call for nominations to the board. Once the board votes on a new member, City Council approves the nomination. Board members are appointed by location so that there is geographical representation from all areas of downtown.

The board is composed of 11 members and includes:

- 9 property or business owners
- 2 representatives from Boulder City Council

The BID contracts with DBP for staffing and administration. DBP has 9 staff members.



## Annual Operating Budget

Revenues 2018		Expenses 2018	
Dollar Amount	Percent of Total	Dollar Amount	Percent of Total
Assessment: \$1,400,000	85%	Personnel: \$610,000	37%
Downtown Management Commission: \$100,000	6%	Marketing: \$466,064	28%
Other income: \$75,000	5%	Service and Maintenance: \$256,400	16%
Denver Boulder Foundation: \$65,000	4%	Administration and Support: \$184,000	11%
		Economic Development: \$86,500	5%
		Contingency: \$25,000	2%
		Sponsorship: \$12,000	1%
<b>TOTAL: \$1,640,000</b>	<b>100%</b>	<b>TOTAL: \$1,640,000</b>	<b>100%</b>

## Assessment Methodology

The BID has a flat assessment fee of 4.73 mills for commercial properties. Residential and non-profit properties are not assessed.

### CONTACT

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## Downtown Ithaca Alliance

The Ithaca Downtown Improvement District (IDBID), which operates as the [Downtown Ithaca Alliance](#) (DIA) is a non-profit 501 C 3 organization, founded in 1997. The District includes Ithaca Commons, the two-block pedestrian mall in downtown.

### Programs

DIA is engaged in five program areas:

1. Business Retention & Development
2. Marketing & Member Services
3. Government Relations & the Environment
4. Community Special Events
5. Transportation; which includes a new TDM program

### Governance & Staff

The DIA is governed by a 27-member Board of Directors, which consists of 23 voting members and 4 non-voting members. New York legislation states that more than 50% of board seats must be held by property owners. It also prescribes that three City representatives be included on the board. The IDBID decided to include a County representative as well, since they have a major presence downtown. Board members include:

- 12 Class A: property owners (larger buildings as well as storefront space)
- 6 Class B: tenant businesses (retail and office)
- 4 Class C: City & County representatives (Mayor, Councilmember, City Staff, plus County rep)
- 1 Class D: residential tenant
- 4 Ex Officio Non-Voting Members:
  - Chamber of Commerce
  - Ithaca College
  - Cornell College
  - Cortland Community College

Classes A, B, and D, elect their own members on an annual basis. Class C (City members) are appointed by the City.

DIA has five full-time employees, 2 part-time employees, seasonal Hospitality Ambassadors, along with interns and volunteers.

Downtown Ithaca Alliance (DIA)

501 c 3 non-profit



Downtown Ithaca Business Improvement District (IDBID)



## Duration

The IDBID has no term limit, it exists in perpetuity.

## Annual Operating Budget

Revenues 2018		Expenses 2018	
Dollar Amount	Percent of Total	Dollar Amount	Percent of Total
Assessment – \$500,000	42%	Staffing (Inc. Ambassadors): \$530,000	44%
Special event income - \$265,000	22%	Community Special Events: \$208,000	17%
State of New York (for TDM program): \$170,000	14%	Downtown Operations: \$187,000	16%
City – \$100,000	8%	Office Operations: \$77,000	7%
Fundraising & Misc.- \$95,000	8%	Misc.: \$89,000	7%
County - \$70,000	6%	Marketing & Member Services: \$75,000	6%
		Business Retention & Development: \$34,000	3%
<b>TOTAL: \$1,200,000</b>	<b>100%</b>	<b>TOTAL: \$1,200,000</b>	<b>100%</b>

## Assessment Methodology

The BID has a flat assessment fee of 2.428 mills for commercial properties and multi-family properties. Single family or condo residential properties and non-profits are not assessed.

### CONTACT

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## Key Findings from Case Studies

These case studies are illustrative of varying ways business improvement districts can be structured. Below are key findings that help not only to inform phase 1 recommendations but will also be drawn upon for phase 2, which will provide a more detailed management plan for downtown Burlington.

- BIDs generally contract services through non-profit 501 c 3 or 501 c 6 organizations.
- It can be beneficial to have both a c 6 and a c3, as is in the case in Boulder. The 501 c 3 is able to pursue grants and support charitable projects, while the 501 c 6 is able to advocate on behalf of the district.
- Sunset clauses, that require renewal of the BID after a set period of time, are a good way to ensure the model is working effectively and serving the district's needed. Since renewal processes are time consuming, it is advisable to have at minimum a ten-year term. A five-year review by feepayers could be done to ensure the BID is effective.
- Ambassador programs, dedicated teams of professionals with easily identifiable attire, are a common and effective way to deliver clean, safe and welcoming services to a district.
- BIDs are typically not responsible for capital improvements in their district; this remains a city responsibility.
- If BIDs are able to generate excess revenue, it is a best practice to maintain a reserve account for future expenses.
- Santa Monica has a tiered rate structure to account for different level of service needs throughout the district, including a premium rate for its pedestrian mall. These "benefit zones" are broken down by geography and areas that receive fewer services pay a lower assessment.
- In some case residential and non-profit properties are assessed, although with a lower fee than commercial properties.
- BID boards are comprised of a majority property and business owners in the district, with a few seats reserved for city, university, resident or other representative.
- BID boards are generally self-perpetuating, meaning the nominating process is controlled by the board itself through either a nominating committee, election of feepayers, or another non-political-appointee process. In some cases, nominations are subsequently approved by the City Council or Mayor. Santa Monica has the most City involvement in board nominations, with half of the board appointed by City Council and the other half elected by property owners.
- Board members typically have term limits, serving two, three-year terms.

# DOWNTOWN BURLINGTON REPORT CARD

The following "Report Card" was developed by P.U.M.A. to compare downtown Burlington on a number of factors key to successful downtowns throughout the nation.

**Downtown Burlington is in many ways considered a national success story, but its fundamentals are starting to weaken. If downtown conditions are allowed to slip further than a "B-", the cost of elevating downtown's experience and infrastructure back to an "A" could become exponentially more expensive. There should be a sense of urgency to improve the management of downtown.**

Category	Grade	Rationale
Hospitality Market	<b>A</b>	<ul style="list-style-type: none"> <li>→ New hotels have largely been seen as a positive for downtown</li> <li>→ Visitor markets help drive sales and contribute to state and local government budgets through sales tax</li> </ul>
Aesthetic and Vibe	<b>B+</b>	<ul style="list-style-type: none"> <li>→ Church Street provides a vibrant, charming, unique experience at the heart of downtown</li> <li>→ The energy fades off of Church Street and there is an inconsistent vibe throughout the rest of downtown</li> </ul>
Retail Market	<b>B+</b>	<ul style="list-style-type: none"> <li>→ Diversity of local, independent retailers</li> <li>→ Nationally recognized brands that started in Burlington</li> <li>→ Inconsistent off of Church Street</li> </ul>
Parking and Transportation	<b>B</b>	<ul style="list-style-type: none"> <li>→ Some lack of awareness around parking options</li> <li>→ Strides are being made with the new Parkmobile app and website.</li> <li>→ Compact scale but alternative mode connections could be increased</li> </ul>
Clean and Safe	<b>C+</b>	<ul style="list-style-type: none"> <li>→ Church Street is clean; side streets are inconsistent</li> <li>→ Sense of safety has eroded with recent crimes and aggressive street behaviors</li> <li>→ Safety, particularly off of Church Street was frequently cited as a concern among stakeholders</li> </ul>
Office Market	<b>C</b>	<ul style="list-style-type: none"> <li>→ Vacancies are relatively high, rents are soft</li> <li>→ Employee parking cost and availability an impediment to business attraction</li> </ul>
Infrastructure	<b>C</b>	<ul style="list-style-type: none"> <li>→ Sidewalk repair needed throughout downtown</li> <li>→ Church Street tired, needs updating</li> <li>→ Sense that downtown is disconnected from the waterfront</li> </ul>
<b>OVERALL GRADE</b>	<b>B-</b>	

# IMPLICATIONS

Based on a review of existing conditions, stakeholder input, and best practices from successful management organizations in similar downtowns, P.U.M.A. recommends that downtown Burlington begin the process of establishing a full-service **business improvement district (BID)**. This is considered the best model for enhancing the management, maintenance and marketing of downtown and meeting the needs of the Burlington community.

## Benefits of a BID

- Funded by commercial property owners who opt to pay an additional tax assessment to benefit their district
- Provides *enhanced* services, above and beyond standard city services, can include:
  - Public safety
  - Cleaning and maintenance
  - Beautification elements; such as lighting, landscaping, art
  - Mobility improvements, including walking, biking, transit
  - Public space activation
  - Parking management services to enhance customer experience
  - Special events management
  - Marketing and district identity/branding
  - Hospitality, information and signage
  - Economic vitality services to support local businesses
- Helps to address issues with street level behavior
- Provides increased services for vulnerable populations
- Reliable source of funding
- Strengthens a district's competitiveness
- Creates a unified approach to managing, marketing and maintaining a district
- Leverages public and private resources for improving a district
- Responds quickly to market changes and community needs
- Advocates for implementing community-supported projects and other initiatives that benefit the district
- Protects investment of business and property owners
- Enhances the tax base to support a high level of services citywide
- Maximizes accountability for feepayers



## Why a BID is Needed in Downtown Burlington

- 1. Need for diversified downtown services beyond Church Street.** Stakeholder input revealed that there are needs for downtown that are not being met under the current improvement district model. In particular there are disparities on and off of Church Street in terms of things like safety, cleanliness, infrastructure, and strength of the retail market. In the nearly twenty years since the DID was established, the need for downtown services has evolved beyond parking. While there are still some parking improvements to be made, it has become less of a priority, particularly among younger generations, as indicated in the online survey. Additionally, many of the feepayers in the DID do not feel they benefit from the parking program. Some feepayers, especially those on the waterfront, provide their own parking for tenant and customers. Other feepayers were not aware that they pay a DID fee to support two-hour free parking. The sentiment from most stakeholders was that the DID fee could be used to support a broader array of downtown services.
- 2. The downtown management structure is outdated.** Improvement districts have evolved nationally over the past twenty years in terms of services and management structure and most have adopted a balanced public-private partnership approach. It is unconventional for a city department to manage the delivery of enhanced services, as is the case in Burlington. This model has caused some angst among the districts feepayers, who feel they lack oversight and input into how the district is managed. Additionally, the City of Burlington does not have a base level service agreement, which is a common element and best practice among BIDs nationally. Typically, capital improvements, such as brick repair, utilities, electrical and similar work are considered core local government responsibilities. Church Street Marketplace feepayers, however, are currently responsible for capital improvements in their district, which can be cost prohibitive. Additionally, feepayers are concerned that their fees are used to pay for core local government services such as basic snow removal and trash pick-up. Since BIDs are intended to enhance, not replace, city services, these base level agreements are foundational for an effective public-private partnership. A new BID would offer a fresh start for downtown Burlington and be designed based on national best practices for downtown management organizations.
- 3. Downtown is fragmented and services are out of balance.** The fact that there are two overlapping improvement districts, within a relatively small geographic area, has created unnecessary fragmentation in downtown Burlington. There is also imbalance in the perception and reality of the benefits derived from each district. Church Street Marketplace feepayers generally feel that they pay too much and carry the weight of downtown and feepayers in the DID generally feel that Church Street Marketplace receives most of the attention and the side streets are neglected. A BID would create a unified approach to downtown management.
- 4. Sharpen downtown's competitive edge.** Although downtown Burlington was an early leader in creating a walkable, vibrant downtown, the scorecard on page 22 indicates that a number of downtown's fundamentals have slipped. Downtown's infrastructure is tired and as indicated by survey respondents and focus groups, there are concerns about safety and increased social service needs of those in the downtown area. Additionally, survey respondents, particularly a younger demographic, indicated a strong desire for new retail and restaurants downtown. In an increasingly competitive and disruptive retail environment, downtown needs to sharpen its competitive edge. A BID would help downtown Burlington reliably deliver clean, safe and stimulating experiences to a variety of downtown users.

# ALTERNATIVES ASSESSMENT

This section outlines three alternative models of governance for a downtown management organization in Burlington. The scenarios below are organized from “least change” to “most change” in terms of the level of effort, impact and management philosophy. In Vermont there is no state enabling legislation for improvement districts; so, improvement districts have been established through municipal charters. Because the creation, governance and powers of the DID and CSMP are written into the charter [Title 24 Appendix, Chapter 3, Sections 321 – 327], any changes that require a modification to the charter, will require more effort. The charter change process includes a referral by City Council’s Charter Change Committee, a City Council vote, a citywide vote, and ultimately approval by the State Legislature.

In developing the following scenarios, we were guided by the following objectives:

- **Update the business model for the management and marketing of Downtown Burlington:** The CSMP and DID are 35 and 20 years old, respectively. During this time, methods for managing and marketing downtown business districts have evolved. The following alternatives for Burlington are designed to bring downtown more in sync with “best practices” that are polishing the value proposition of downtowns throughout the nation.
- **Create an enhanced services district that can serve downtown for the next 20 years:** A new downtown management approach should be forward-thinking and anticipate changes that may occur over a long-term horizon. Flexibility should be built into the management structure to allow for periodic review that would enable changes in services as needs evolve.
- **Provide for accountability to assessment district feepayers:** Many downtown property and business owners are seeking a higher level of accountability in any new assessment district scenario. Accountability includes finding the most efficient methods for delivering enhanced services and governance that allows property and business owners to determine their own representation and the optimal use of their own special assessments.
- **Develop a solution that respects local values:** Any new assessment district option will need to respect the values of Burlington and the role of downtown, Church Street, and the waterfront as the “living room” of the community. Downtown should continue to be the most welcoming place in the city and celebrate the many dimensions of diversity found in Burlington.

## Scenario #1 | Public Model

### Expand the CSMP District

In this scenario, the CSMP district is expanded to the boundary of the DID. Expanding the CSMP District is allowable under the charter, up to the boundary of the DID, if the majority of the CSMP Commission recommends the district be expanded and two-thirds of City Council votes in favor. Once the CSMP District is expanded, the DID should be defunded, changing the fee from \$0.09 per hundred in appraised value to \$0.00. Assuming Church Street continues to receive a greater proportion of services, a new tiered fee structure could be established whereby properties off of Church Street pay a lesser assessment<sup>6</sup>. **Governance of the expanded CSMP District would remain under the City of Burlington.**

### Establish Base Level City Services

BIDs are intended to enhance, not replace, city services. A best practice among BIDs is to work with cities early in the BID formation process to establish base level service agreements. These agreements define the city’s existing level of service within the district and ensure a commitment to continue these services. For Burlington, this should include clarifying the City’s responsibility in funding capital improvements throughout downtown.

### Revenue Enhancement

The charter says that a parking program shall “include not less than two free hours of parking for anyone parking in a designated municipally or privately owned or operated parking garage or parking lot located within the downtown improvement district”. As mentioned previously in the report, the DID fee does not cover the full cost of providing two-hour free parking in the City garages and the City is losing potential parking revenue. Many stakeholders also felt that the two-hour free parking was no longer relevant and that money could be spent in other ways to benefit downtown. It is recommended that two-hour free parking only be designated in the most underutilized City garages and shift to a one-hour free or business validation program in the most utilized garages. The additional parking revenue could then be re-invested into downtown parking-related improvements.

Scenario #1   Public Model	
Positives	Challenges
Does not require a charter change.	<p>The expanded CSMP District remains a City department; limited feepayer responsibility; overhead/admin expense.</p> <p>Since the boundary can only be expanded to that of the DID, a number of active properties and redevelopments, would be excluded.</p>
DID area can receive enhanced services beyond a parking program.	
Two downtown entities are combined into one. Stronger together; more consistent downtown experience.	
City recovers some of the revenue lost from 2-hour free parking and is able to reinvest that back into downtown parking-related improvements.	

<sup>6</sup> The charter allows that common area fees to be levied on properties in proportion to the benefit the property receives.

## Scenario #2 | Public-Private Model

### New Business Improvement District

In this scenario, the charter is amended to allow CSMP District and the DID to be replaced by a new business improvement district (BID). A new non-profit entity would be formed to oversee the District and provide or contract enhanced services desired by downtown stakeholders, such as initiatives around safety, cleanliness, marketing, economic development, and mobility improvements. An assessment methodology could consider “benefit zones” that account for varying levels of enhanced services. A new district could be expanded beyond the current boundary of the DID.

### Establish Base Level City Services

BIDs are intended to enhance, not replace, city services. A best practice among BIDs is to work with cities early in the BID formation process to establish base level service agreements. These agreements define the city’s existing level of service within the district and ensure a commitment to continue these services. For Burlington, this should include clarifying the City’s responsibility in funding capital improvements throughout downtown.

### Sunset Clause

Many BIDs include a clause that calls for a re-evaluation of the BID after a certain amount of time. This provides a level of assurance that services and assessments are consistent with the needs of the district. It is recommended that an initial term be no less than 10 years but feepayers could conduct an interim five-year review.

### Governance

A board of directors would be formed to oversee the BID. Similar to Downtown Santa Monica, Inc., there would be shared appointment between those elected by downtown property owners and those appointed by City Council.

The City would maintain all regulatory responsibility, considered a core government responsibility.

Scenario #2   Public-Private Model	
Positives	Challenges
Two existing downtown entities are combined into one new BID – fresh start!	Requires a charter change process, including approval by City Council, a citywide vote, and approval from the State Legislature.
Economies of scale with just one district.	
The former DID area receives enhanced services beyond a parking program.	
The district boundary could be expanded to encompass active properties or new redevelopments that are not currently part of the DID.	
More accountability to feepayers.	
City maintains their core governmental responsibilities.	

## Scenario #3 | Private Model

### New Business Improvement District

In this scenario, the charter is amended to allow CSMP District and the DID to be replaced by a new business improvement district (BID). A new non-profit entity would be formed to oversee the District and provide or contract enhanced services desired by downtown stakeholders, such as initiatives around safety, cleanliness, marketing, economic development, and mobility improvements. An assessment methodology could consider “benefit zones” that account for varying levels of enhanced services. A new district could be expanded beyond the current boundary of the DID.

### Establish Base Level City Services

BIDs are intended to enhance, not replace, city services. A best practice among BIDs is to work with cities early in the BID formation process to establish base level service agreements. These agreements define the city’s existing level of service within the district and ensure a commitment to continue these services. For Burlington, this should include clarifying the City’s role in funding capital improvements throughout downtown.

### SUNSET Clause

Many BIDs include a clause that calls for a re-evaluation of the BID after a certain amount of time. This provides a level of assurance that services and assessments are consistent with the needs of the district. It is recommended that an initial term be no less than 10 years but feepayers could conduct a five-year review of the plan and programs.

### Governance

**The primary difference between scenarios 2 and 3 is related to the governing board.** Both have governing boards overseeing the BID, however, instead of shared appointment between the City and private sector, the board would control its own nominating process. The composition would be almost exclusively district businesses and/or property owners, with one or two seats reserved for city representatives.

Some business improvement districts such as the Downtown Denver Partnership, are designated regulatory authorities, such as vendor permitting and design review, which are traditionally considered core government responsibilities. This could be considered in scenario #3.

Scenario #3   Private Model	
Positives	Challenges
Downtown Burlington’s management and marketing approach is updated based on national best practices.	Requires a charter change process, including approval by City Council, a citywide vote, and approval from the State Legislature.
Two existing downtown entities are combined into one new BID – fresh start!	Need to dispel concerns over privatization of downtown.
The former DID area receives enhanced services beyond a parking program.	Need to ensure accountability with a non-governmental service provider.
Economies of scale with just one district.	
Most accountability for feepayers.	

# PREFERRED MODEL

P.U.M.A. recommends a governance model for downtown Burlington that most closely mirrors scenario #3. This scenario establishes a new downtown management organization (a BID), to replace the Church Street Marketplace district and the DID. The BID would be run by a non-profit organization, comprised primarily of feepayers in the district, with two seats reserved for City representatives. The board would control the nominating process and all members would serve terms of two-to-three years.

This is the most common and effective model, used by more than 90% of BIDs nationally. Satisfaction is indicated by a 99% BID renewal rate. This model responds to concerns voiced by feepayers who feel the existing improvement districts are out-of-balance and feepayers do not have the level of oversight that is common among business improvement districts nationally. This model would provide feepayers with appropriate accountability and deliver enhanced services throughout downtown. Additionally, combining two downtown entities into one creates efficiencies and offers a fresh start for downtown Burlington.

## The preferred model recommends:

- A charter change to allow for the creation of a new business improvement district for downtown Burlington
- The two existing downtown entities, Church Street Marketplace and the DID, combined into one new entity (BID)
- A non-profit 501 c 3 or c 6 created to service the BID
- New enhanced services provided throughout downtown (on and off Church Street)
- Consideration of a tiered fee structure that adjusts for varied service needs
- A board of directors that oversees the BID, composed almost exclusively of downtown feepayers, plus one seat reserved for the Mayor and one seat reserved for a City Council representative
- A self-perpetuating board, where the nominating process is controlled by the board itself
- The City would *not* designate regulatory responsibilities (e.g. vendor permitting, design review) to the BID

## NEXT STEPS:

Based on stakeholder priorities and recommendations in Phase 1, a **draft BID Management Plan Summary** will be compiled. The plan will be a user-friendly educational tool for property and business owners and City officials. The BID Management Plan Summary will provide an overview of the BID along with sufficient detail to allow all stakeholders to evaluate the BID opportunity for downtown Burlington. The summary is anticipated to include the following:

- District rationale and objectives;
- Recommended district boundaries and identification of any sub-areas or benefit zones;
- Relationship to existing or proposed districts, including Church Street Marketplace and the DID;
- Service plan options with first year budget and multi-year projection;
- Recommended assessment methodology and formula, including tiered rate structure options;
- Governance and service delivery structure options;
- City participation evaluation;
- Timetable and steps for BID creation;
- Other issues related to BID management and formation.

## APPENDIX

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The following individuals contributed to the content and process of this phase 1 report.

### DID WORKING GROUP PARTICIPANTS:

- Kelley Devine, Burlington Business Association (BBA)
- Ron Redmond, Church Street Marketplace
- Patrick Mulligan, Department of Public Works, Parking and Traffic, City of Burlington
- Jillian Nantou, Sustainability, Housing and Economic Development, Community and Economic Development Office, City of Burlington

### DID ADVISORY COMMITTEE PARTICIPANTS:

- Adam Roof, Burlington City Councilor, DIDAC Committee Chair
- Robert DiPalma – Paul Frank and Collins Attorneys
- Springer Harris - Teucrium Trading LLC
- Michael McNamara - downtown resident
- Jeff Nick, J.L. Davis Realty, Church Street Marketplace Commission Chair
- David Schilling, Investors Corporation of Vermont
- Ashely Bond, UVM Hospital
- Kara Alnasrawi, Liebling
- Rich Price, Select Design

# BURLINGTON DOWNTOWN EXPERIENCE SURVEY SUMMARY

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In partnership with the City of Burlington and the Burlington Business Association (BBA), Progressive Urban Management Associates (P.U.M.A.) prepared an online survey to gather information from a broad audience about their experience and desires for downtown Burlington. Between April 23, 2018 and June 20, 2018 there were **1,143 responses**.

## KEY FINDINGS

### Who took the survey?

24% of survey respondents are downtown employees in the private sector, 21% are downtown residents, and 12% are downtown employees in the public sector. 62% of respondents identify as female, while 34% identify as male. There was a relatively even age and income distribution among survey respondents.

### How do survey respondents interact with downtown Burlington?

The majority of respondents (63%) interact with downtown Burlington once a week or more.

- Respondents '*Frequently*' visit downtown for:
  - Restaurants (44%)
  - The waterfront park or other downtown parks (40%)
  - Personal services (25%)
- Respondents '*Rarely*' visit downtown for:
  - Religious services (92%)
  - City business (59%)
  - Bars, clubs, and nightlife (57%)

### What do survey respondents think about downtown Burlington today?

Respondents were asked to select the three most important factors in their enjoyment of downtown and the waterfront. The top three factors are:

- Safe streets and public spaces (55%)
- Restaurants and retail (47%)
- Clean streets and public spaces (36%)

### What do survey respondents think will improve downtown Burlington for the future?

#### DOWNTOWN OVERALL

The enhanced services that were selected as most important for improving the overall downtown experience are:

1. Parking and transportation services (43%)
2. Homeless outreach and assistance services (34%)

- 3. Infrastructure improvements (31%)
- 4. New restaurants and retail options (31%)
- 5. Enhanced security services (23%)

### CHURCH STREET MARKETPLACE

The enhanced services that were selected as most important for improving the Church Street Marketplace experience are:

- 1. New restaurants and retail options (41%)
- 2. Homeless outreach and assistance services (40%)
- 3. Parking and transportation services (37%)
- 4. Infrastructure improvements (26%)
- 5. Enhanced security services (25%)

### WATERFRONT

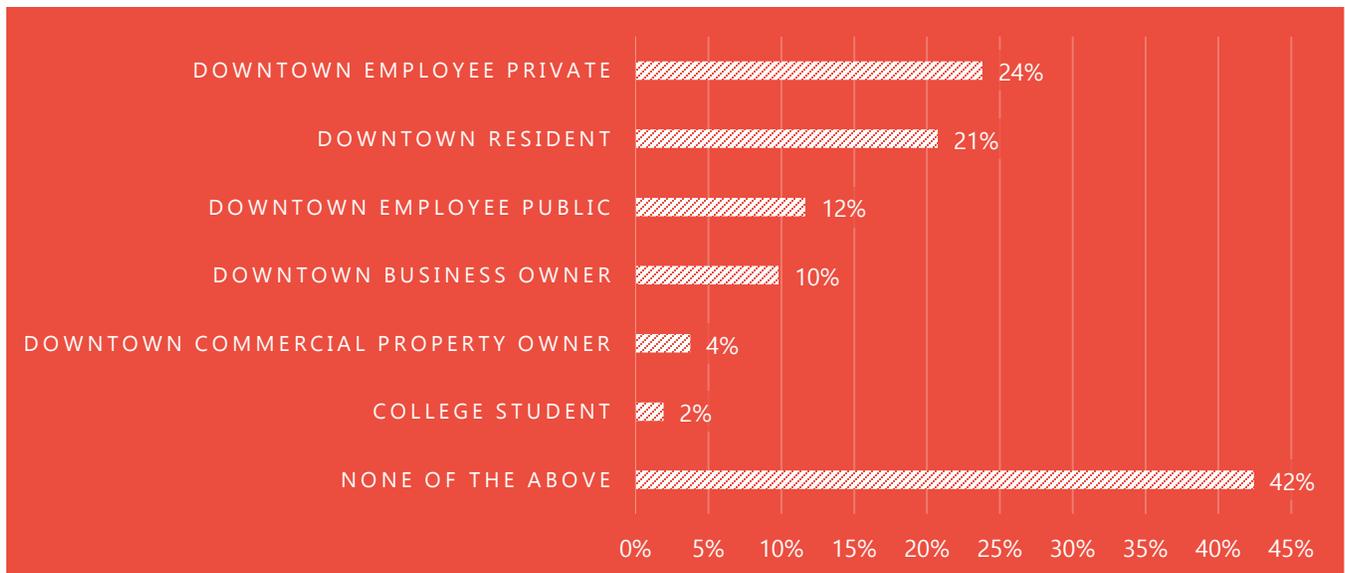
The enhanced services that were selected as most important for improving the waterfront experience are:

- 1. Parking and transportation services (42%)
- 2. Special events (38%)
- 3. Maintenance and management of public parks (34%)
- 4. Activities for people in public spaces (33%)
- 5. New restaurants and retail options (31%)

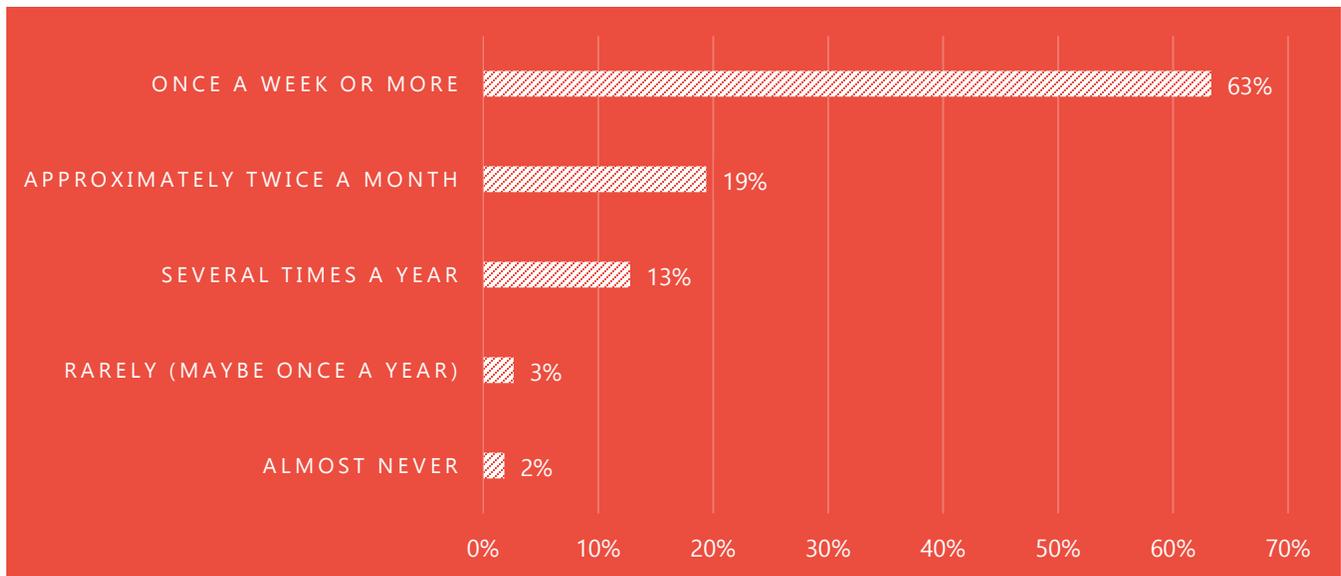
## SURVEY RESULTS

### Section 1: How do you interact with downtown Burlington?

Question 1: Which of the following describes your connection to downtown Burlington?



Question 2: Outside of work, how often do you come to downtown Burlington?



Question 3: Outside of work, how often do you visit downtown Burlington for the following?

	Frequently	Semi-Regularly	Rarely
<b>Restaurants</b>	<b>44%</b>	44%	12%
<b>Waterfront Park or other downtown parks</b>	<b>40%</b>	42%	19%
<b>Shopping</b>	<b>29%</b>	45%	26%
<b>Personal services (salon, barber, bank, etc.)</b>	25%	36%	39%
<b>Arts &amp; culture</b>	20%	52%	28%
<b>Special events</b>	19%	57%	25%
<b>Bars, clubs, nightlife</b>	15%	28%	<b>57%</b>
<b>City business</b>	14%	27%	<b>59%</b>
<b>Religious services</b>	5%	3%	<b>92%</b>

Multiple respondents indicated in the 'Other' answer option that they visit downtown Burlington for:

- Farmer's market
- Library
- Recreation including bike and walking paths
- Transit center

## Section 2: What Do You Think About Downtown Burlington Today?

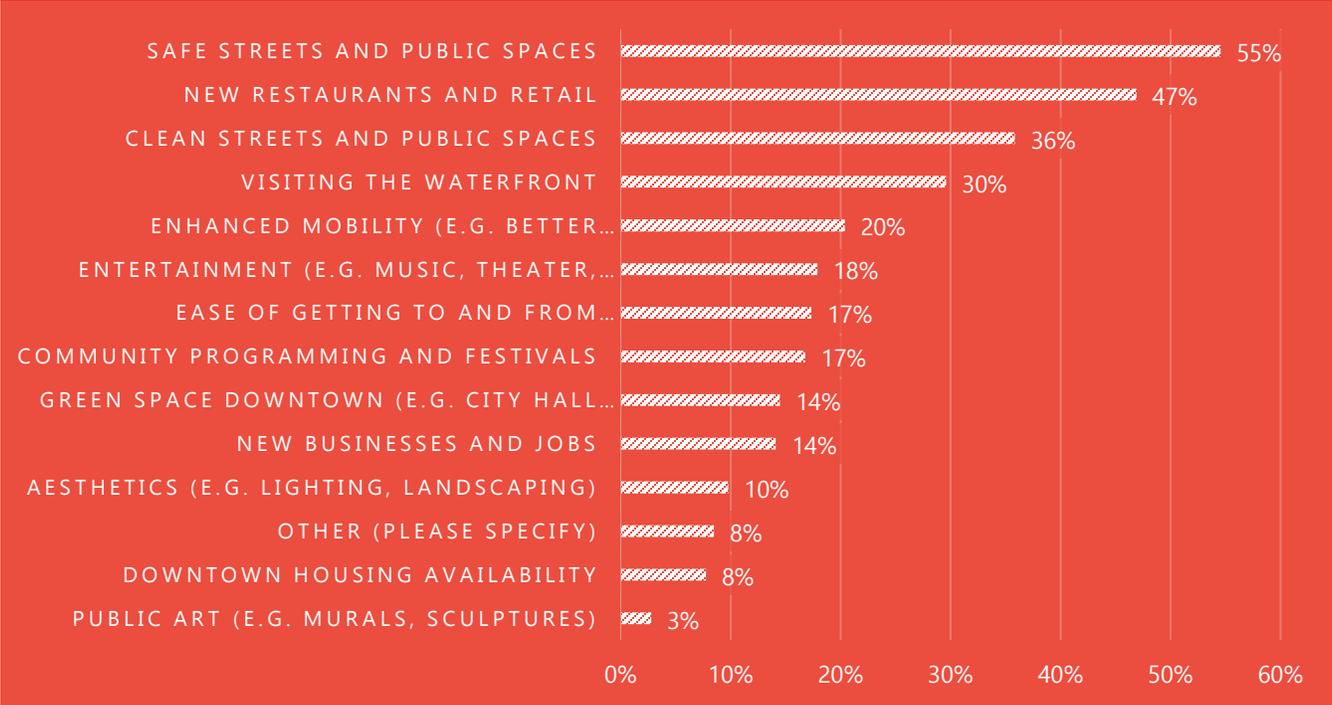
Question 4: Please rate how important the following are for your enjoyment of downtown Burlington and the waterfront.

	<b>Very Important</b>	<b>Important</b>	<b>Somewhat Important</b>	<b>Not Important</b>
<b>Safe streets and public spaces</b>	86%	12%	1%	0%
<b>Clean streets and public spaces</b>	79%	19%	2%	0%
<b>Restaurants and retail</b>	72%	22%	6%	1%
<b>Visiting the Waterfront</b>	65%	25%	8%	1%
<b>Enhanced mobility (e.g. better connections, improved sidewalks, bike lanes)</b>	53%	29%	13%	5%
<b>Ease of getting to and from Burlington's waterfront</b>	53%	33%	11%	2%
<b>Aesthetics (e.g. lighting, landscaping)</b>	52%	37%	9%	1%
<b>Green space downtown (e.g. City Hall Park)</b>	50%	35%	13%	3%
<b>Businesses and jobs</b>	45%	32%	15%	7%
<b>Community programming and festivals</b>	41%	38%	17%	3%
<b>Entertainment (e.g. music, theater, street performers)</b>	38%	38%	20%	4%
<b>Public art (e.g. murals, sculptures)</b>	27%	38%	26%	9%
<b>Downtown housing availability</b>	25%	27%	25%	22%

Amenities that were deemed important by multiple respondents in the 'Other' category include:

- Parking ease and affordability
- Public restrooms
- ADA accessibility

Question 5: Please select up to THREE factors that are most important to your enjoyment of downtown Burlington and the waterfront.





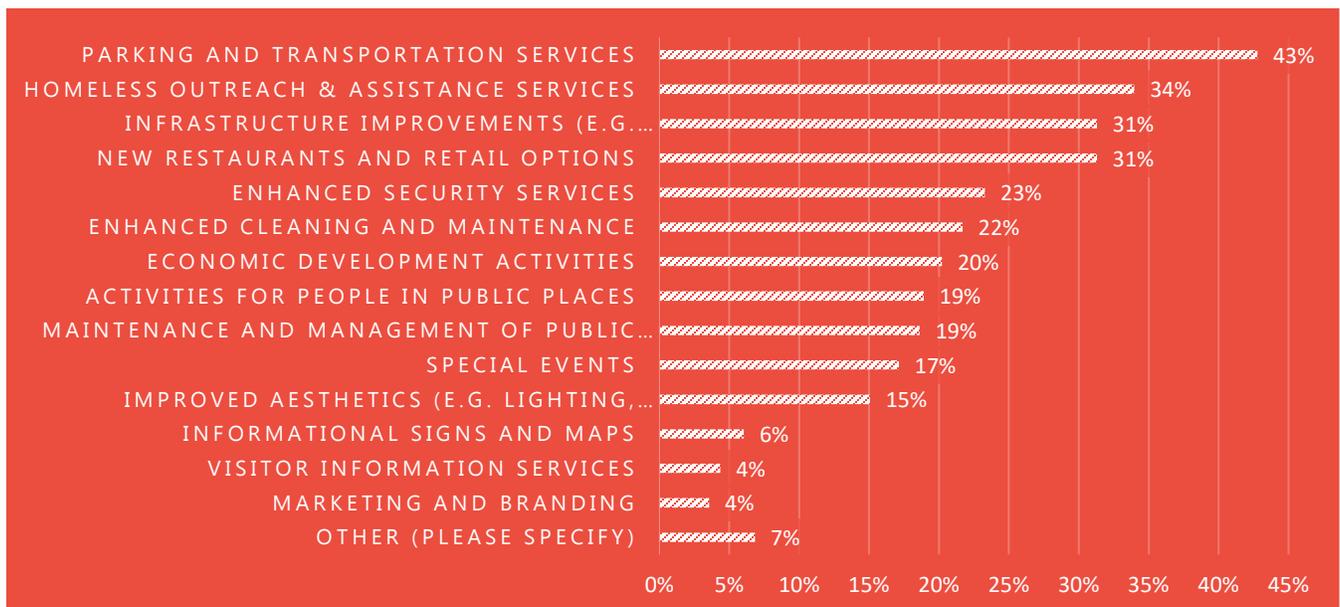
Question 7: The following are enhanced services often undertaken by downtowns. Please select up to THREE services that are most important for enhancing the **Church Street Marketplace** experience.



Popular responses in the 'Other' category include:

- Sustainability initiatives (renewable energy, alternative transportation, etc.)
- Public restrooms
- Bicycle facilities (parking, bike lanes, etc.)
- Enforcement of the existing smoking ban

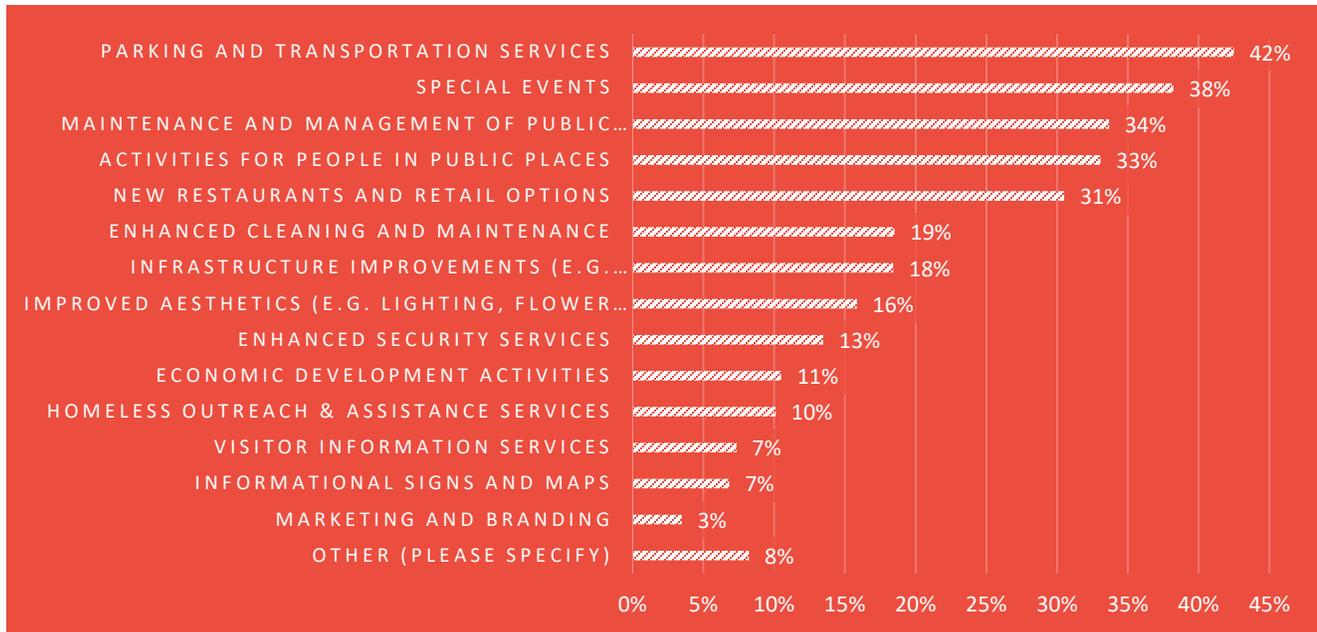
Question 8: The following are enhanced services often undertaken by downtowns. Please select up to THREE services that are most important for enhancing the **Downtown overall** experience.



Popular responses in the 'Other' category include:

- Public restrooms
- Improved pedestrian and bicycle infrastructure
- Non-chain restaurants and retail
- Family-friendly amenities

Question 9: The following are enhanced services often undertaken by downtowns. Please select up to THREE services that are most important for enhancing the **Waterfront** experience?



Additional services respondents included in the 'Other' category include:

- Public restrooms
- Improved connections to downtown Burlington
- Public art
- Improved water quality

Question 10: If you could recommend ONE action, program, or project to improve downtown Burlington, what would it be?

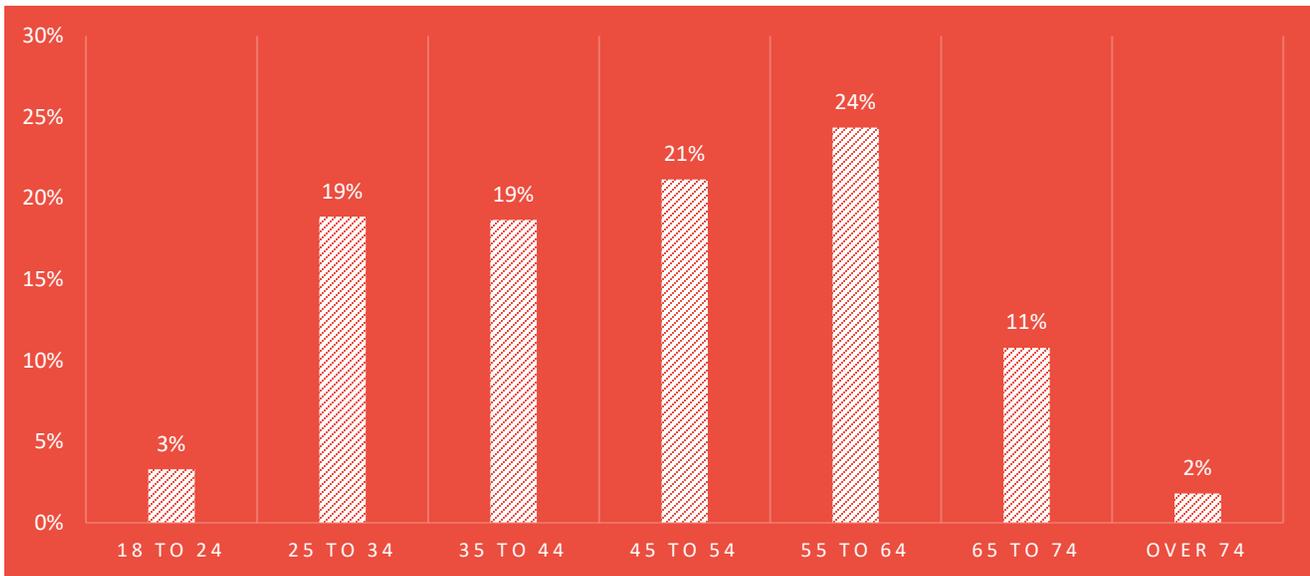
Actions, programs, and projects that were identified by multiple respondents include:

- Local retail that is catered to residents and employees (hardware store, grocery, a deli, etc.)
- Improve safety and cleanliness
- Bicycle and pedestrian infrastructure (bike lanes, ADA accessibility, bike parking, sidewalk quality, connectivity, etc.)
- Family-friendly events and activities
- Transit connections and accessibility between downtown, the waterfront, and the rest of the city
- Parking ease and affordability
- Improve traffic management and road infrastructure
- Services for people experiencing homelessness

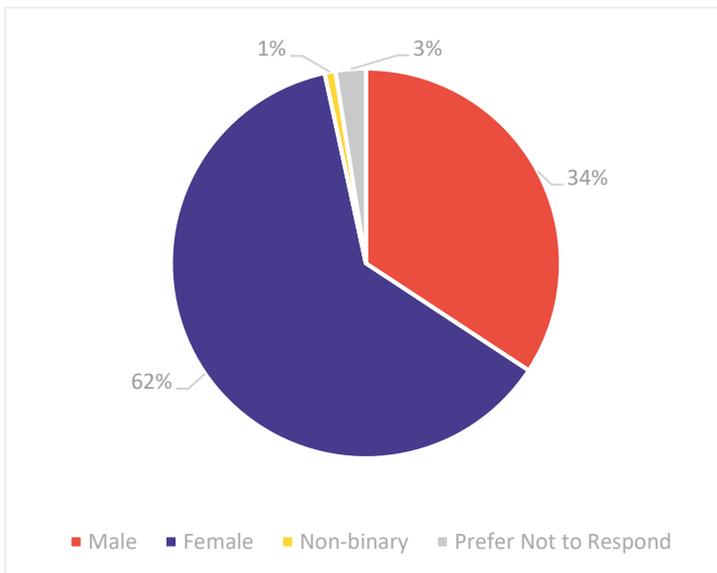
- Balance new development with maintaining existing character
- Public restrooms

## Section 4: Please tell us about you.

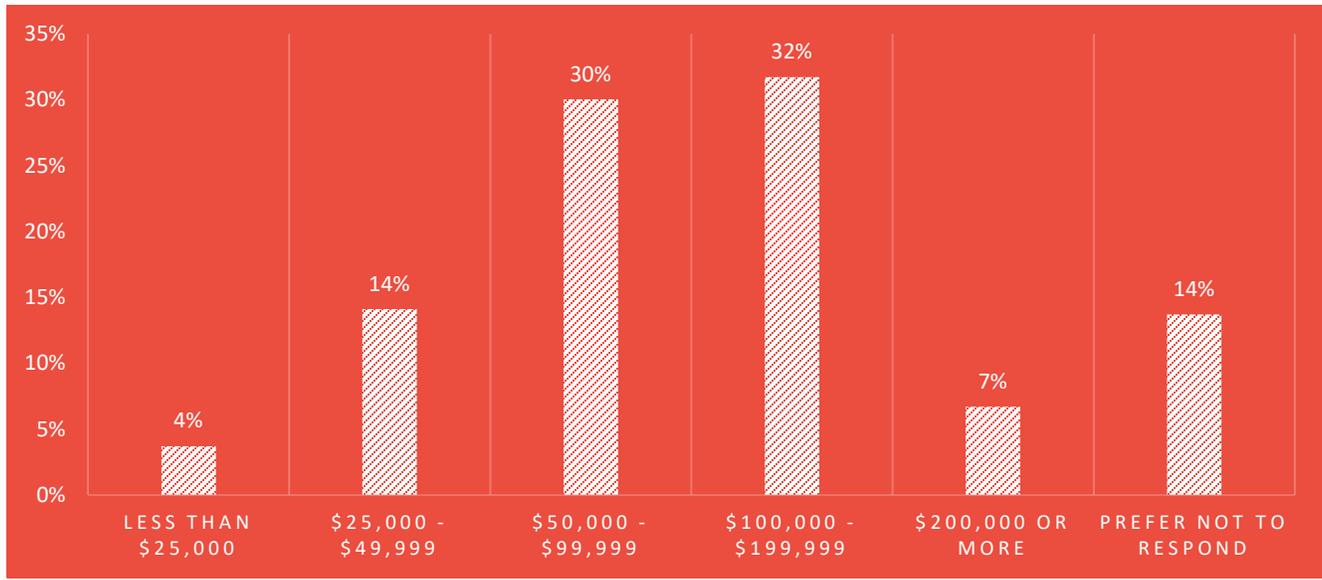
### Age



### Gender



## Annual Household Income



## Zip Code

Survey respondents provided 86 different zip codes, primarily in the greater Burlington area. The most popular zip codes were 05401 (36%), 05408 (14%), and 05452 (6%).

## CROSS TABULATIONS

### Interest in downtown Burlington

- Downtown residents frequently shop, go to restaurants, utilize the waterfront or other downtown parks, and attend to personal services compared to other respondents.
- Downtown business owners and college students selected new restaurants and retail as the most important factor for their enjoyment of downtown Burlington and the waterfront, while employees, commercial property owners, and residents selected safe streets and public spaces.
- College students prioritized enhanced mobility and downtown housing availability as important to their enjoyment of downtown Burlington and the waterfront significantly more than other groups.
- Commercial property owners prioritized new businesses and jobs as important to their enjoyment of downtown more than employees, residents, business owners, and college students.
- College students and employees selected new restaurants and retail options as the most important to enhancing the **Church Street Marketplace**. Downtown residents and business owners selected homeless outreach and assistance services, and commercial property owners chose enhanced security services.
- Downtown commercial property owners equally ranked infrastructure improvements, enhanced cleaning and maintenance, and parking and transportation services as the most important to enhancing the **downtown overall** experience. Business owners, private employees, and college students selected parking and transportation services. Public employees chose homeless outreach and assistance services, and residents prioritized infrastructure improvements.
- When asked what services would be most important to enhancing the **waterfront** experience, private employees and commercial property owners selected special events. Business owners chose parking and

transportation services, residents selected maintenance and management of public parks, and public employees prioritized activities for people in public places. College students equally prioritized special events and activities for people in public places.

## Age

- Respondents under 34 frequently go to restaurants in downtown Burlington, while the majority of respondents over 35 indicated they do only semi-regularly.
- The majority of respondents over 74 frequently visit downtown for arts and culture, compared to respondents under 74 who semi-regularly do the same.
- Downtown housing availability was significantly more important to respondents between the ages of 18 and 24 than other age groups.
- Respondents under 34 selected new restaurants and retail as the most important factor for their enjoyment of downtown Burlington, while respondents over 35 prioritized safe streets and public spaces.
- When asked what services could enhance the **Church Street Marketplace**, respondents under 44 were primarily concerned with new restaurants and retail options and homeless outreach and assistance services. Respondents over 45 also selected these enhancements, but the majority were most concerned with parking and transportation services.
- To enhance the **downtown overall** experience, respondents between 18 and 24 were most concerned with new restaurants and retail options. Respondents between 25 and 34 equally prioritized new restaurants and retail, parking and transportation services, and homeless outreach and assistance services. Respondents between 35 and 44 were most concerned with infrastructure improvements, and respondents over 45 were primarily interested in improving parking and transportation services.
- Respondents under 34 were most interested in special events to enhance the **waterfront** experience, while respondents from 35 to 74 prioritized parking and transportation services. Respondents over 74 selected enhanced cleaning and maintenance as the most important enhancement.

## Frequency with which Respondents Visit Downtown

- Overall, respondents who visit Burlington once a week or more considered all of the provided amenities as either important or very important to their enjoyment of Downtown and the waterfront compared to respondents who visit Downtown approximately twice a month or less. Additionally, respondents who visit Downtown once a week or more do so most frequently for restaurants (59%) and Waterfront Park or other downtown parks (52%).
- Respondents who rarely visit Downtown ranked entertainment options as very important to their enjoyment of Downtown and the waterfront significantly more than respondents who visit Downtown more frequently.
- Respondents who almost never visit Downtown were significantly more concerned with enhanced cleaning and maintenance for improving the Church Street Marketplace, Downtown overall, and the waterfront than respondents who visit more frequently.
- Respondents who visit Downtown approximately twice a month or several times a year were more concerned about improving parking and transportation services in Downtown overall than other respondents.