

Lowell Business Improvement District

MASSACHUSETTS DOWNTOWN INITIATIVE



Commonwealth of Massachusetts
Executive Office of Economic
Development

Ann
McFarland
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Consultant
Vibrant downtowns,
healthy communities.

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PROJECT OVERVIEW

The City of Lowell, MA secured a Massachusetts Downtown Initiative Grant to assist the City, the downtown neighborhood association, the Lowell Plan, Chamber of Commerce, and other stakeholders in their work to relaunch efforts to form a Business Improvement District (BID) in downtown Lowell. The proposed BID is intended to establish a dedicated organization that would provide supplemental programs, services, and advocacy for the downtown. The City of Lowell and downtown stakeholders have considered the formation of a BID periodically over the past decade but have not moved forward. A new steering committee and City leadership has engaged to relaunch efforts to form a BID.



The development of a Business Improvement District was identified as a priority project in the Local Rapid Recovery Plan (LRRP) for downtown Lowell to provide a sustainable management model for downtown. The City spearheaded efforts to relaunch stakeholder and property owner engagement to explore the development of a BID.

This included:

- Review of work undertaken to date on the development of a BID
- Review and update of draft boundary alternatives
- Analysis of the proposed composition of the district
- Community engagement strategies
- Identification of priority programs
- Draft budget
- Preliminary communication materials
- Outreach to key property owners and elected officials

The City of Lowell and volunteer steering committee undertook this phase of the BID Planning project. The approach included outreach to property owners, focus groups, and community education to explore program priorities, build consensus and find champions from both the private and public sector to lead or support efforts to form the BID.

COMMUNITY OUTREACH AND EDUCATION

The City of Lowell and BID steering committee was committed to an inclusive stakeholder engagement process. It was important to have the relaunch of the BID formation process meaningfully engage property owners, and business leaders, but also include the diverse business community, nonprofits, educational and arts organizations, and residents in downtown Lowell.

- **Relaunch Steering Committee** The new BID steering committee is inclusive and representative of the downtown community including large property owners, small property owners and businesses, the cultural community, the Lowell Plan, National Park Service and local residents. Additional steering committee members will be added throughout the planning phase of the project. The Steering committee is a strong sounding board for the development of the BID Plan components and the execution of the petition campaign to form the BID.
- **Key Stakeholder Small Group and Individual Meetings** One—on—one meetings were held with key public, private, and nonprofit institutional leadership to gauge support and understanding of the BID concept, and gain their endorsement of the project. These meetings were considered critical for the future success of the campaign to organize the BID.
- **Focus Groups** A series of focus groups were undertaken as part of the community engagement process. The focus groups included:
 - Property owners
 - Daytime businesses
 - Restaurants and entertainment based businesses
 - Residents
 - Educational institutions and Nonprofits

Focus Group Format Focus groups were held with targeted stakeholders to gain their perceptions about downtown Lowell and their specific needs and priorities. Focus group participants were asked to reflect on downtowns they have visited that resonated with them as socially and economically thriving destinations. Each focus group had specific suggestions and observations that were unique to this group of downtown stakeholders. Consistent themes emerged from the discussions and formed the basis for the priority program recommendations.



FOCUS GROUP FINDINGS

Focus group participants were asked to reflect on communities they felt had vibrant and economically successful downtowns. These downtowns were from throughout the country but each exhibited common elements that projected a healthy and positive image of their district.

Some common characteristics of successful downtowns are exhibited in the look, feel, and functionality that create vibrant spaces. Are there a variety of dining and retail choices? Does the downtown feel safe and welcoming? Are there programs and events for residents and visitors of all ages? Can you comfortably walk, drive or park in the district?

Successful downtowns have a healthy tenant mix that features interesting retail, diverse dining and entertainment options, and few long term vacancies. They frequently have active arts and cultural programming, activities for all ages and places for people to comfortably gather. Consistent and clear marketing and communication send the message that the downtown is a dynamic place for people to live, work or visit. Successful downtowns feel welcoming through consistent programming, lighting, good design, wayfinding, and other activities that help define their distinct "sense of place."



Places That Work

Focus groups identified the following communities as successful in cultivating vibrancy, economic health, and livability.

Lexington, MA	Portland, ME
Concord, MA	Savannah, GA
Newburyport, RI	Belmont Center, MA
Nashua, NH	Central Sq. Cambridge, MA
Portsmouth, NH	Montpelier, VT
Harvard Sq., Cambridge	Salem, MA
Burlington, VT	Amherst, MA
Portsmouth, NH	Oakland (Temescal
Maynard, MA	Uptown), CA
Tuscan, AR	Berkely, CA
Montreal, Canada	Ferndale, MI
Somerville, MA	Detroit, MI
Providence RI	South Bend, IN



Common Elements For Success

- Walkability and ease of navigation
- Parking availability, convenience, safety, and affordability Residents (range of housing opportunities)
- Variety of food choices/outdoor dining
- Independent, interesting retail
- Few vacancies
- Feels alive/active — full seasons of programming / activities
- Welcoming: attractive curb appeal and safety
- Green spaces to gather and relax
- Lighting for safety and aesthetics
- Reuse of historic architecture; historic attractions
- Communication/Marketing — ease of finding out what's going on
- Visitor attractions

DOWNTOWN LOWELL IN COMPARISON

Focus groups were asked to compare downtown Lowell to help identify the real or perceived challenges and opportunities that could be addressed through the proposed BID.

CHALLENGES

Focus group participants felt that downtown Lowell would benefit from supplement programs that would enhance the aesthetics of downtown with elevated maintenance, improved streetscapes and landscaping, trees, lighting, and improved open spaces would create a better experience for residents and visitors. Additionally, improvements to wayfinding signage and improved parking maintenance and management would overcome concerns about accessible, convenient, and comfortable parking downtown. Successful large signature events like the Lowell Folk Festival only happen once a year. Participants also would like to see a well-promoted and varied menu of year-round programming, events and family-focused activities to add vibrancy, generate foot traffic for existing businesses, and promote vacant or underutilized storefronts. Participants felt that addressing these common concerns could enhance the perception of the downtown as a safe and welcoming place to shop, work, live and visit. It was the consensus that a more organized and intentional approach to managing issues impacting downtown would eliminate silos and benefit the downtown community.

OPPORTUNITIES

Downtown Lowell has many positive attributes that were acknowledged by focus group participants upon which to build. The rich cultural diversity of the community is reflected in the growing number of small businesses and dining opportunities. Lowell has a reputation for its signature events that draw visitors from a wide area. The opportunity to build on this strong cultural heritage and burgeoning arts community has the potential to grow and expand its impact. New housing development is creating a significant residential community that could increase the sense of vibrancy and safety in the downtown. While there is high demand for services, the Lowell nonprofits and volunteer community are well connected to assist individuals in need. This cooperation presents an opportunity to face challenges to provide services. Additionally, downtown Lowell is home base for a significant student population that presents a potential market for the downtown businesses that could be more fully developed.

Finally, the Lowell National Park presents the opportunity to connect visitors to the downtown. Suggested supplemental programs to be undertaken by the BID include increase and coordinate events, improve the "curb appeal" and functionality of the downtown, and address real or perceived concerns about safety.



What's Working In Downtown Lowell?

- Cultural diversity seen in businesses /dining
- National Park tourist destination
- Robust nonprofit ecosystem
- Art/Culture environment growing
- Walkable
- Students offer big potential
- Signature festivals
- Sports teams
- Clean Up Crew



PROPOSED BUSINESS IMPROVEMENT DISTRICT PROGRAM PRIORITIES

Based on steering committee discussions, focus group findings and individual meetings with property owners, public officials, and other downtown stakeholders, a series of shared priorities have begun to emerge. These priorities will form the basis of the BID plan and will help the steering committee determine the BID budget. The priorities were grouped around efforts to make the district feel welcoming and attractive, support new and existing businesses, create a destination and reasons for visitors and residents to visit downtown Lowell.

1. Safety and Beautification — Create a Welcoming Downtown

The Business Improvement District will undertake efforts to build awareness that downtown Lowell is a welcoming, safe destination for visitors, residents, and students. This will involve a variety of tactics to consistently manage the downtown activity, coordinate with ambassadors, police and social service providers to provide services, elevate general maintenance and streetscapes, architectural lighting, and design of gathering spaces, leveraging the National Park, and increase programming and events to generate more vibrancy and foot traffic downtown. A strategic approach will help create a welcoming environment downtown. The following chart are specific programs that could be offered by the BID.



Safety/Beautification

Create a Welcoming Downtown

- Consistent coordination and management of street activity — coordination with nonprofits/ law enforcement / communication
- Police presence / ambassadors
- Lighting and design of gathering spaces
- Marketing — Communicate activities / art and cultural programming/ reasons to come
- Programming to drive activity and foot traffic
- Improve navigation and walkability of intersections
- Elevated maintenance
- Clean Up Crew

2. Establish the Brand — Market Vibrancy Businesses, Experiences, Places

The BID will provide to opportunity to consistently market and brand downtown Lowell as a destination. This could be accomplished through integrated brand marketing, signage, promotions such as food and cultural events, Lowell ArtWalks and experiences , visitor tours , websites, social media and other activities that are consistently and sustainably implemented. Building on the strong signature events that are well known and well attended , downtown Lowell has the opportunity to strengthen its brand as a destination.



Establish the Brand

Market Vibrancy Businesses, Experiences, Places

- Farmers Market
- Winterfest / Folk Fest are great! — Expand additional programming year — round for all ages
- Expand opportunities for artists and makers
- Incentivize businesses to expand hours for businesses to tie to arts, events and programming
- Pop ups
- Arts vendor markets
- Community and green spaces/nice playground for kids / dog parks (dog waste)
- Consistent management, promotion, marketing and coordination of activities

3. Business Support/ Attraction

Downtown Lowell businesses would like to broaden the customer base of residents, students and visitors. Expanding the customer base will help existing businesses downtown and also attract new businesses who see this as an area poised for investment. Stakeholders are also interested in creating opportunities for the next generation of diverse, independent businesses that will add to an interesting retail and commercial mix in downtown Lowell. Experiments with pop up retail have proven popular and could be expanded. Other priority strategies included programs to develop a comprehensive business recruitment package with market data and incentives, create loyalty and cross—marketing programs, activate vacant storefronts, and develop a healthy tenant mix.



Business Support/ Attraction

- Incentives for owners to provide space for entrepreneurs, pop ups, students
- Targeted recruitment — grocery, food stores, consumer product like hardware, basics, family restaurants, ice cream, gardening ,drugs, etc
- Support for existing businesses — storefront, signage, merchandising
- City cooperation in permitting and regulations for business promotions ideas — events, outdoor dining, short term activities
- Market available spaces
- Activate vacant storefronts with temporary uses, murals, art etc to pilot ideas

4. Advocacy — Create a Unified Voice For Downtown

- MOU with City
- Stakeholder partnerships
- A seat at the table
- Unified voice for downtown

A BID will help downtown stakeholders speak with a unified voice to express their priorities, concerns and recommendations. A BID can be a useful tool to ensure good communication between businesses, property owners, institutions and the City to work on mutually beneficial programs and resolve challenges that are present in the downtown. The BID will secure a Memorandum of Understanding with the City for BID participation and support, secure partnerships with stakeholder organizations, and have staff to advocate for downtown priorities. This is an important and valuable role for the BID.

BIG IDEAS

Throughout the community engagement process and focus group discussion, the steering committee asked for the "BIG IDEA" that participants felt would be impactful for downtown Lowell as they consider the formation of a BID. Some of these ideas will require time and resources to implement, but offer a vision of what might be possible working with the City of Lowell and BID. These include:



Big Ideas!

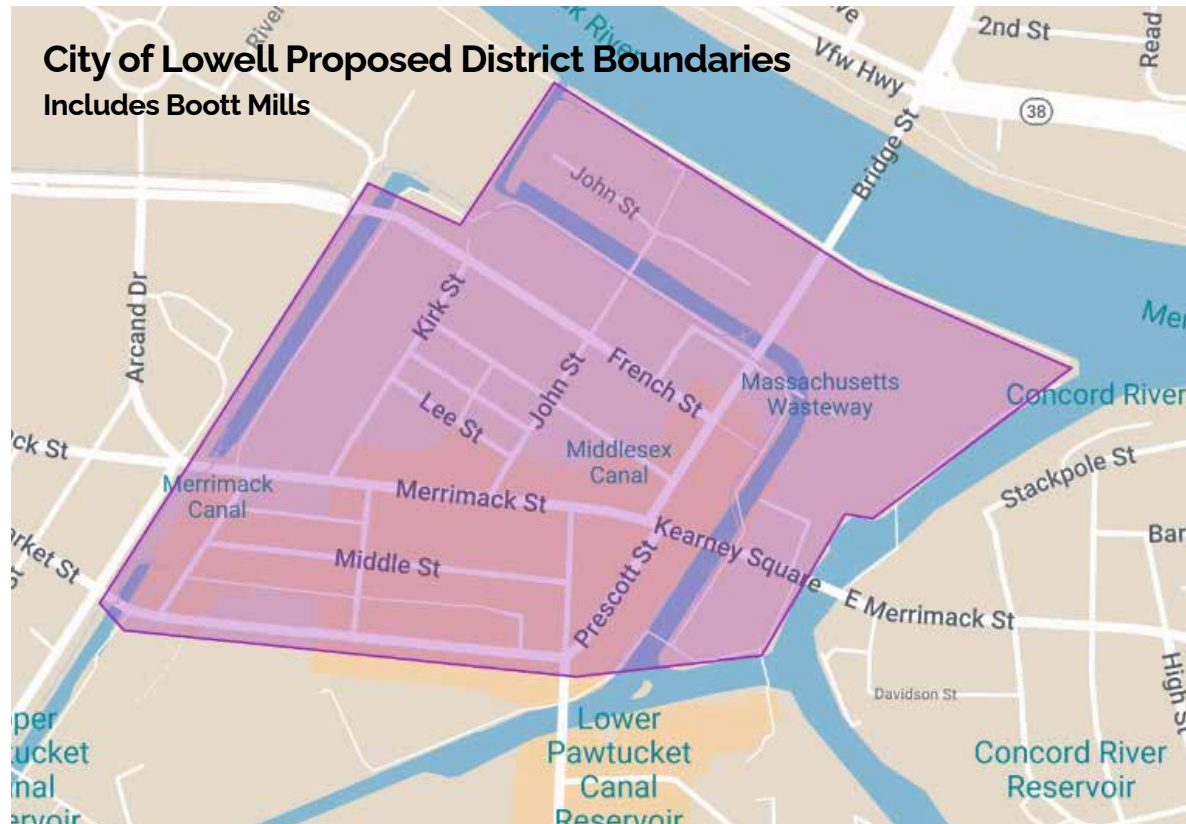
- Welcome and engage new residents in downtown as a new customer base
- Turn Enterprise Parking lot, Palmer and Middle Streets into Arts Space
- Create work and volunteer opportunities for high school, community college and university students
- Transit routing to bring UML students downtown
- Communication/promotion with National Park canal management — water, visitor events, tours
- Create a solid brand identity for Lowell to bring people downtown
- Lean into "Art is the Handmaid of Human Good" What could this theme mean for Lowell ?
- Create large entertainment driven attraction — sports, family activities, arcade, music
- Move bus stop back downtown
- Robust wayfinding signage for parking, attractions, shops
- Architectural lighting of buildings
- Trolley shuttles to help connectivity
- Large community — based event to support nonprofits assisting people in need and assistance programs
- Focus programming on Market/Middle/Merrimack
- Create management and coordinating entity for downtown
- Cooperative marketing, branding, and communication

DISTRICT ANALYSIS

Understanding the composition of the district helps the steering committee develop a deep knowledge of the ownership, land use, valuation and other characteristics of the district. This will inform the fee structure and signature campaign strategy for the successful passage of the petition to form a BID.

Proposed Boundaries

In considering the proposed boundaries for the Lowell BID, several different options were evaluated. The Steering Committee considered land use, valuations, proposed and current development opportunities and political and private support. The final proposed boundary recommendations include the core area of the downtown and Boot Mills. The proposed district reflects the commercial core of the downtown and major destination drivers.



Assessed Valuation of District

There are 174 parcels (excluding small residential and residential condominiums) within the proposed district with a total valuation of \$317,753,120.00. 134 parcels in the district have an assessed value of under \$1.5 million dollars, while a small number of parcels are valued at over \$10,000,000.00. This is an important consideration as organizers develop a fee structure that is fair and equitable for the smaller property owners as well as the handful of larger property owners within the district.

PROPOSED DISTRICT

Total Number of Parcels:
174

Total Assessed Value:
\$317,753,120
51% = \$162,054,091

Distinct Owners: 101
Signature Threshold: 105
(60% of parcels, rounded up)

Excluding Small Residential and Condominiums



Source: Assessor Data; MA DLS Property Type Classification Codes (2019)

PROPOSED DISTRICT

Exempt Parcel Breakdown

Exempt Parcels: 42

Assessed Value:
\$137,563,200

Exempt Property Breakdown



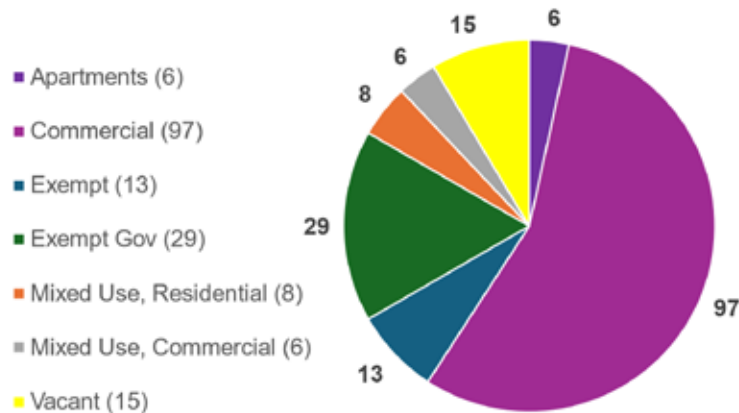
Source: Assessor Data; MA DLS Property Type Classification Codes (2019)

Land Use

The steering committee also analyzed the land use within the proposed district. All small residential and residential condominiums have been excluded from the total count of parcels and assessed value in the district. 57.4% of the district is commercial in nature, .08 % of the land use is mixed use, and 24% are exempt parcels. The relatively large amount of exempt land use includes the National Park and other public/educational uses that are unique destination drivers in downtown Lowell. Additionally, several large apartment complexes represent a large percentage of the assessed value of the district. The Steering committee will need to secure the support of large exempt properties and the owners of larger apartment developments for the BID concept.

Land Use Type

Number of Parcels By Land Use Type



Source: AssessorData; MA DLS Property Type Classification Codes (2019)

PROPOSED DISTRICT

**Total Number
of Parcels*:**
174

Total Assessed Value*:
\$317,753,120

Distinct Owners:
101

*No small residential or
condos in parcel count or
assessed value



Estimated Budget and Sample Fee Structures

The steering committee outlined a proposed budget and sample fee formula for consideration. The chart below reflects the proposed possible budget and fee structure. Additionally, MOUs with public property owners will be negotiated to outline their participation in the BID, and will add to the anticipated total budget.

Potential BID Budget Scenario – Sample Fee Structure

Excluding small residential, residential condominiums, and Governmental Exempt

Property Type	Parcel Count	Total Assessed Value	*.0035	*.004
Apartments	6	\$ 88,120,900	\$308,423	\$352,484
Commercial	97	\$ 58,798,500	\$205,794	\$235,194
Mixed Use, Commercial	6	\$ 3,938,300	\$13,784	\$15,733
Mixed Use, Residential	8	\$ 28,811,420	\$100,840	\$115,246
Exempt*	12	\$ 21,688,400	\$75,909	\$86,754
Vacant	15	\$ 430,800	\$1,575	\$1,723
Potential BID Budget			\$706,325	\$807,134

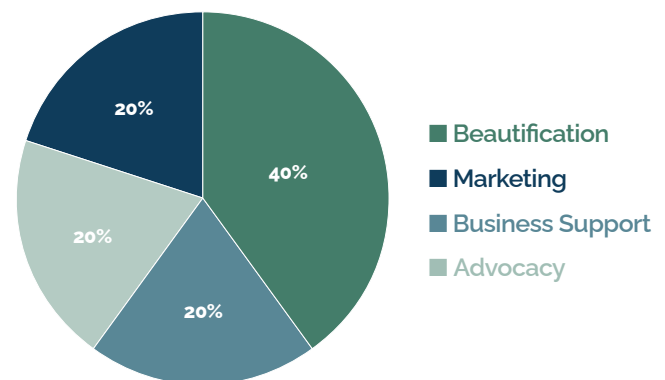
Government exempt properties will have a separate MOUs detailing their participation in the BID.

Source: Assessor Data; MA DLS Property Type Classification Codes (2019)

Estimated Budget: \$900,000 — \$1,000,000

TARGET BID REVENUE	
Fee Structure (.0035 — .004 X assessed value)	\$700,000 — \$800,000
Public	\$100,000
Grants, sponsorships	\$100,000
Estimated Total	\$900,000 — \$1,000,000

Sample BID Budget Allocation



Communication and Outreach Materials

The steering committee has produced a brief flyer outlining the proposed district, budget, work plan and fee structure alternatives that will be used for initial conversations with property owners.



NEXT STEPS

The next step of the BID project will complete the planning phase of the project and finalize budget, fee structure and BID Plan, develop the formal petition, and prepare for the formal signature campaign. This phase will include the following steps:

- Transition leadership from city led effort to steering committee comprised of property owners, businesses, and other stakeholders to lead organizational effort to form a BID.
- The City will continue to staff and secure additional support for the planning/petition process.
- Further development of the BID steering committee/identify chairs/co-chairs
- Finalize BID improvement plan
- Finalize boundaries
- Finalize fee structure
- Develop memorandum of understanding with City and other stakeholders
- Design petition components
- Develop marketing materials for signature campaign
- Develop signature petition campaign and timeline for legislative approval
- Execute signature petition campaign
- Execute legislative authorization approval process
- Launch BID

Downtown Lowell

Business Improvement District (BID)



A Business Improvement District (BID) is a downtown organization formed and managed by property owners to provide supplemental programs and services that benefit downtown properties, businesses, residents, and visitors. These enhancements address unique needs of this geographic area and go beyond what the City and local partners can provide. The Downtown Lowell BID will help create a destination that sets us apart from other communities to attract customers, residents, businesses, and investors!



Funding

SUSTAINABLE / AFFORDABLE / STRATEGIC

A BID provides a way to pool and leverage self-sustaining funding to strategically implement new programs and services for the greatest return on your investment. The BID will employ staff to provide marketing, advocacy, business support and development, and streetscape improvements that will help create a welcoming and vibrant downtown Lowell.



The BID budget is comprised of fees paid by BID property owners that are further leveraged by grants, sponsorships and other revenue generating activities. Each BID fee structure is unique and determined by the property owners in the district. BIDs have been a part of downtowns of all sizes throughout the country for over 60 years. History has shown that successful BIDs result in increased property values, sales, tenancy, civic pride and customer and business satisfaction. Property owners may choose to continue or discontinue the BID

after a 5-year period. In other communities, property owners have overwhelmingly chosen to continue and expand BIDs after seeing positive impacts on their downtowns.

The BID Delivers: Proposed BID Plan Components

BID resources are used exclusively within the district.

BEAUTIFICATION – MAKE DOWNTOWN WELCOMING

Install lighting, green spaces, and public art; fill gaps in landscaping and vacant storefronts; develop curated Lowell Walks, institute safety Ambassadors.

MARKETING – ESTABLISH THE BRAND

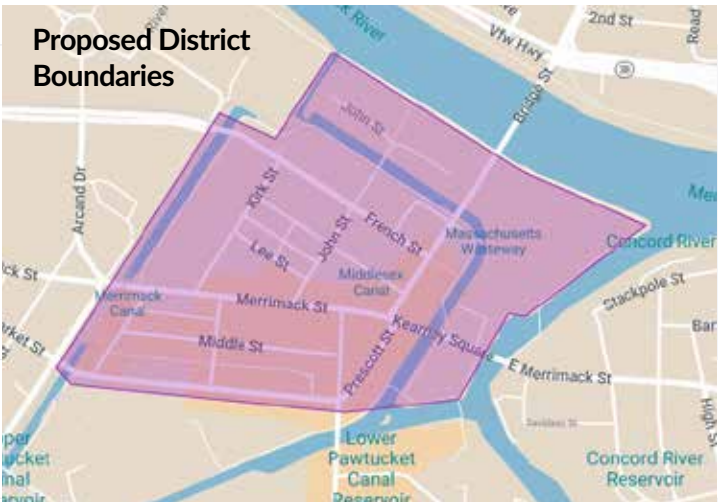
Organize food and culture events, develop programs to guide visitors, bring students downtown, offer Lowell Experiences tours and activities.

BUSINESS SUPPORT & RECRUITMENT – STRENGTHEN THE BASE

Develop a comprehensive business recruitment package with market data and incentives to fill key gaps, create loyalty and cross-marketing programs for downtown businesses.

ADVOCACY – FORMALIZE YOUR SEAT AT THE TABLE

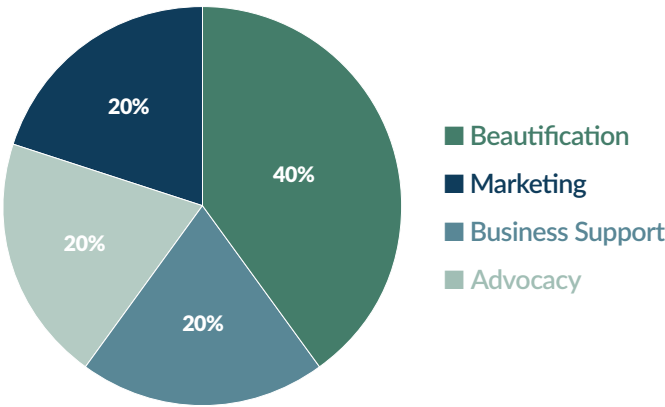
MOU with the City for BID participation, secure partnerships with stakeholder organizations, staff to advocate for downtown priorities.



Estimated Budget: \$900,000 – \$1,000,000

TARGET BID REVENUE	
Fee Structure (.0035 – .004 X assessed value)	\$700,000 – \$800,000
Public	\$100,000
Grants, sponsorships	\$100,000
Estimated Total	\$900,000 – \$1,000,000

Sample BID Budget Allocation



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