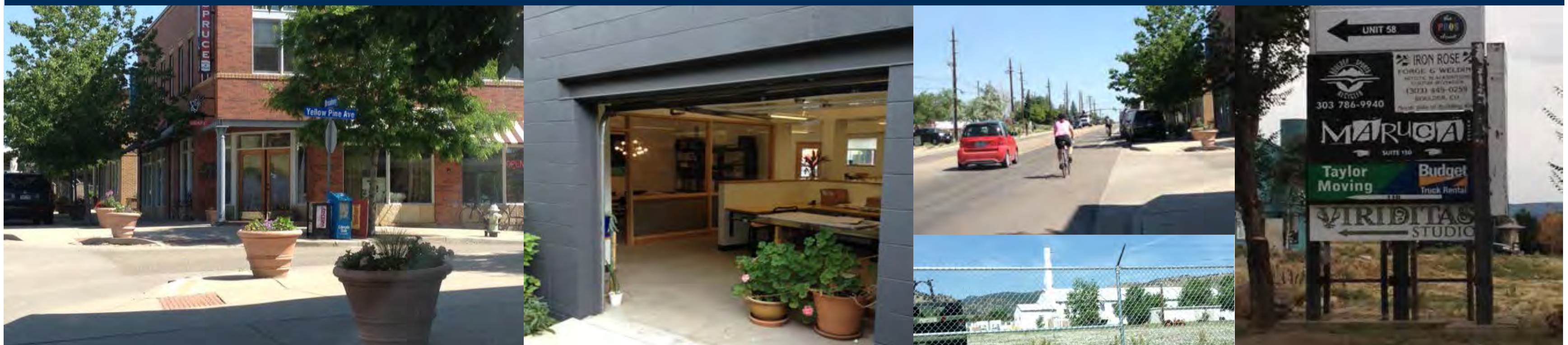
APPENDIX 1: NORTH BROADWAY MARKET STUDY



North Broadway Market Study

Presented to:

City of Boulder, Colorado

December 18, 2013

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I. EXECUTIVE SUMMARY

ArLand Land Use Economics (ArLand) was retained by the City of Boulder in the summer and fall of 2013 to prepare a market analysis for the North Broadway area. ArLand prepared this technical report summarizing the economic conditions and market potentials of the area. The report serves as a framework and background for the development of the North Boulder Subcommunity Plan update.

Project Scope

The purpose of the market study is to act as the foundation to evaluate the feasibility of developing the Village Center as currently depicted in the North Boulder Subcommunity Plan (1995 Plan), with a focus on the feasibility of a retail anchor land use, and to evaluate the redevelopment potential on North Broadway as it relates to the 1995 Plan's vision. The information is a basis for planning the types and intensities of uses, development scenarios and preferred alternatives. As with any plan and ultimate development project, the actual mix and timing of development is going to vary.

Existing Conditions and Findings

- The **North Boulder Subcommunity Plan**, adopted in 1995, **helped facilitate a tremendous amount of change and redevelopment** in the North Boulder area. While the Holiday neighborhood and Uptown Broadway followed the subcommunity's planning process, **a few significant areas have not redeveloped** and outstanding questions remain regarding the Village Center and anchor land uses; role and location of a grocery store; the future of the Armory site; and the increased prominence and role of the arts in the area.

- Because the North Boulder Subcommunity is at the northern edge of Boulder and adjacent to open space, **several market areas were examined** including the immediate neighborhood market area (1-Mile Market Area[1]), as well as Regional and Tertiary Market Areas which include households in communities like Jamestown, Lake of the Pines, and county areas beyond City limits. This report closely examines the potential for a grocery store in the North Broadway area. Boulder is a jobs center and attracts a significant number of commuters, some of whom will shop while in the City. At the same time, **communities like Longmont and Louisville have grown enough to support their own specialty stores**, like Lucky's and Alfalfa's, reducing the number of residents from these communities who would shop in Boulder for specialty grocery items.

- **There are higher income households in the 1-Mile Market Area,** and a solid mix of income types and households. The majority of households in the 1-Mile Market Area earn between $100,000 and $200,000 annually. There are a significant percentage of households with higher incomes and higher housing values in the market areas examined relative to the City of Boulder and Boulder County. Other characteristics of the 1-Mile Market Area include a greater percentage of residents of Hispanic origin, a larger

[1] For the purposes of this report, the neighborhood market area is a 1-mile radius from the intersection of Yarmouth Avenue and Broadway in North Boulder.

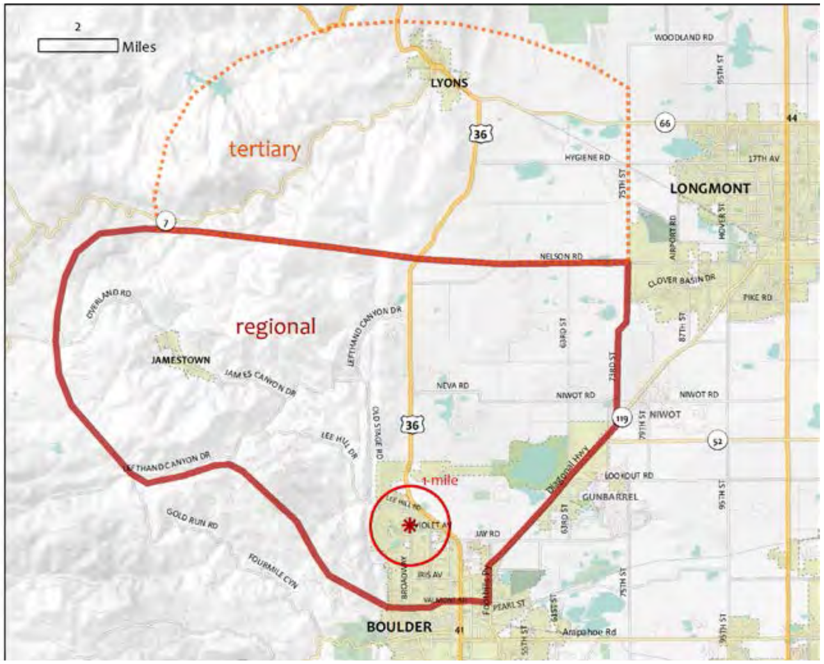
percentage of residents aged 0-17 years, and a greater percentage of homes valued at less than $150,000 based on estimates of the current population.

- **There are an estimated 1,200 to 1,300 full and part time employees in the North Broadway area** (immediate NoBo neighborhood) with employees in manufacturing, landscaping and construction-related fields, wholesale and retail trades, and personal and business services. There are an estimated 225 artists and others in the creative industries located in the area, according to the NoBo Art District.

- Neighborhood-oriented retail such as grocery stores is heavily dependent on the number of neighborhood rooftops. **There is a significant amount of grocery store retail square feet in the Boulder market area** (over 673,000 square feet in 20 stores), however, much of it is more centrally located and in neighborhoods south and east of the North Broadway area, highlighting why **some North Broadway residents feel that there is a lack of grocery services** in the neighborhood. At the same time, most grocery stores, while serving a neighborhood need, also serve residents from a wide-ranging area.

- Under current conditions, the analysis indicates that there is **unmet neighborhood demand for 17,000 to 28,000 square feet of grocery uses** in the 1-mile radius. In evaluating the market, many stores would also evaluate potential demand in the wider Regional and Tertiary market areas which would include serving communities in the broader area such as Jamestown and Lyons shown in Figure 1. In this area, under current conditions, there is broader unmet demand for **25,700 to 42,900 square feet of grocery uses**, assuming that residents here would drive to Boulder for their grocery store needs.

Figure 1
Grocery Store / Supermarket Market Areas



Source: ArLand

- At the same time, potential developers and retailers evaluating the North Boulder market have expressed concern about the **significant amount of grocery retail** already existing in the Boulder market, as well as the North Broadway area's proximity to open space and lack of density relative to other Boulder neighborhoods. Potential developers and retailers have also indicated concern about the **potential impact that an additional neighborhood or full-service grocery store** would have on existing grocery store retailers in the area. Conversations and an impact analysis estimate that the impact would be 20-25% of current estimated revenues for those stores closest to the North Broadway area. Lucky's, because of its geographic proximity to the North Broadway area, would potentially be the most heavily impacted.

- From now through 2035, this analysis forecasts **demand for approximately 85,000 to 195,000 square feet of additional retail and restaurant development** in the 1-Mile Market area, in addition to demand for grocery store retail. However, without an anchor or additional redevelopment activity, absorption is likely to be slow. Grocery store development could propel demand for commercial development adjacent to or in easy proximity to the grocery store. Without additional activities supporting redevelopment west of Broadway, Armory redevelopment would not be enough to help bolster commercial redevelopment mid-block or at the Broadway and Yarmouth Village Center intersection. Additional activities would include any activity that would accentuate the role of Yarmouth and Broadway as the Village Center in the area.

- From now through 2035, this analysis forecasts **demand for approximately 25,000 to 30,000 square feet of additional office and 30,000 to 35,000 square feet of additional light industrial / flex space.** Small office space has been popular in the area for business and professional services, many in the creative arena. Some of the industrial demand could be met at properties zoned industrial in the northern portion of the North Broadway area. Small office space demand could be met at redeveloped properties on the west side of Broadway.

- **The Armory site and Village Center area have the greatest potential for a retail anchor land use or grocery store location, but both have significant constraints**. The Armory is not as centrally located (relative to the Village Center area) and is not currently zoned to accommodate a traditional grocery store or other major retail anchor. The Village Center has not materialized as the neighborhood center and intersection as the North Boulder Subcommunity Plan identifies. There are also flood plain issues for some of the properties west of Broadway.

- At this point in time, without the addition of a significant number of households in the area, **the addition of a neighborhood or full-service grocery store would potentially impact the viability of other grocery stores including Lucky's,** which is approximately one mile from Broadway and Yarmouth. There has also been an ongoing desire for neighborhood commercial services. The market for these services would be bolstered with an increased number of households in the market area which would strengthen demand.

- The NoBo Art District has a significant and growing presence in the North Broadway community.[2] With **an estimated 225 artists and creatives** in the area, it is a potential avenue to create a brand and niche distinct from other parts of Boulder. The District has indicated a strong interest in assisting with branding, public improvements, and other activities which could potentially help the

[2] The NoBo Art District is not an officially designated arts district, but is currently pursuing state and local designation.

District as well as their businesses. They have organized First Friday events as well as other activities in the area. There is a particularly strong clustering of artists at 4949 Broadway and 4593 Broadway.

- Broadway can be wide and intimidating. Yarmouth doesn't go through on the west side of Broadway. While the North Boulder Subcommunity Plan calls for Yarmouth to extend through to the west side of Broadway, that extension will be facilitated when redevelopment occurs on the affected properties. **An intersection and pedestrian crossing at the Yarmouth and Broadway location will help ground the location as the neighborhood Village Center and create a better connection between the east and west sides of Broadway**. Without additional improvements to the intersection of Yarmouth and Broadway like these, it is unlikely that any commercial redevelopment at the Armory would benefit the Village Center area and vice-versa. Limited retail development at the Armory should not impact any commercial development potentials at the Village Center area.

- **On the west side of Broadway, there are a large number of public storage units, auto service centers, and industrial buildings, many of which house artists, construction, and other related businesses**. Some of the buildings are poorly maintained and were significantly impacted by the September 2013 flood. Storage, in particular, provides income to current property owners and can be a difficult land use to transition from.

- Many of the properties in the North Broadway area were heavily impacted by the September 2013 flood. A flood study completed prior to this flood event in 2008 **estimated over $5 million needed for flood plain mitigation on properties on the west side of Broadway near Four Mile Canyon Creek**[3]. The 2013 flood event has triggered the need to reassess the flood boundaries and required mitigation which will affect this estimate. At this time, any redevelopment activity would need to address the flood plain improvement with the first redevelopment responsible for paying all the costs.

- On the west side of Broadway in the Village Center area, there are a variety of **properties within County enclaves**. For redevelopment to occur in accordance with the North Boulder Subcommunity Plan, the properties must annex into the City. Through annexation, city water and sewer will be provided to the properties and additional development potential is allowed. Annexation and connection to city utilities is expensive, and many of these county enclaves have additional challenges, in particular high hazard floodplain designation. Therefore, **annexation and redevelopment of the properties is particularly challenging**.

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[3] Source: City of Boulder/Urban Drainage and Flood Control District – Fourmile Canyon Creek and Wonderland Creek Major Drainageway Planning (Final Plan), May 2011, page18.

II. Introduction

The City of Boulder retained ArLand Land Use Economics (ArLand) in the summer and fall of 2013 to prepare a market study for the North Broadway area in preparation for the City's planned update of the North Boulder Subcommunity plan. The purpose of the market study is to help analyze the feasibility of developing the Village Center as currently depicted in the North Boulder Subcommunity Plan and to evaluate the development potential along North Broadway. Data analysis was completed and interviews were conducted in the summer of 2013. The report is intended to serve as a framework and background for the development of an update to the subcommunity plan.

Project Background

The North Boulder Subcommunity Plan, adopted in 1995, helped facilitate a tremendous amount of change and redevelopment in the North Boulder area. At the time, the area contained nearly half of the city's total vacant residential land and several prominent vacant or under-developed commercial sites. While the Holiday Neighborhood is a result of the subcommunity planning process which envisioned an integrated, mixed-use, mixed-income community, a few significant sites in the Village Center and in the Yarmouth North areas have not redeveloped. It appears that the 100 year flood plain has impeded redevelopment in parts of the area west of Broadway. The Village Center concept, intended to be the "heart of the subcommunity" has not fully materialized. A number of questions have surfaced since the development of the 1995 Plan, relating to:

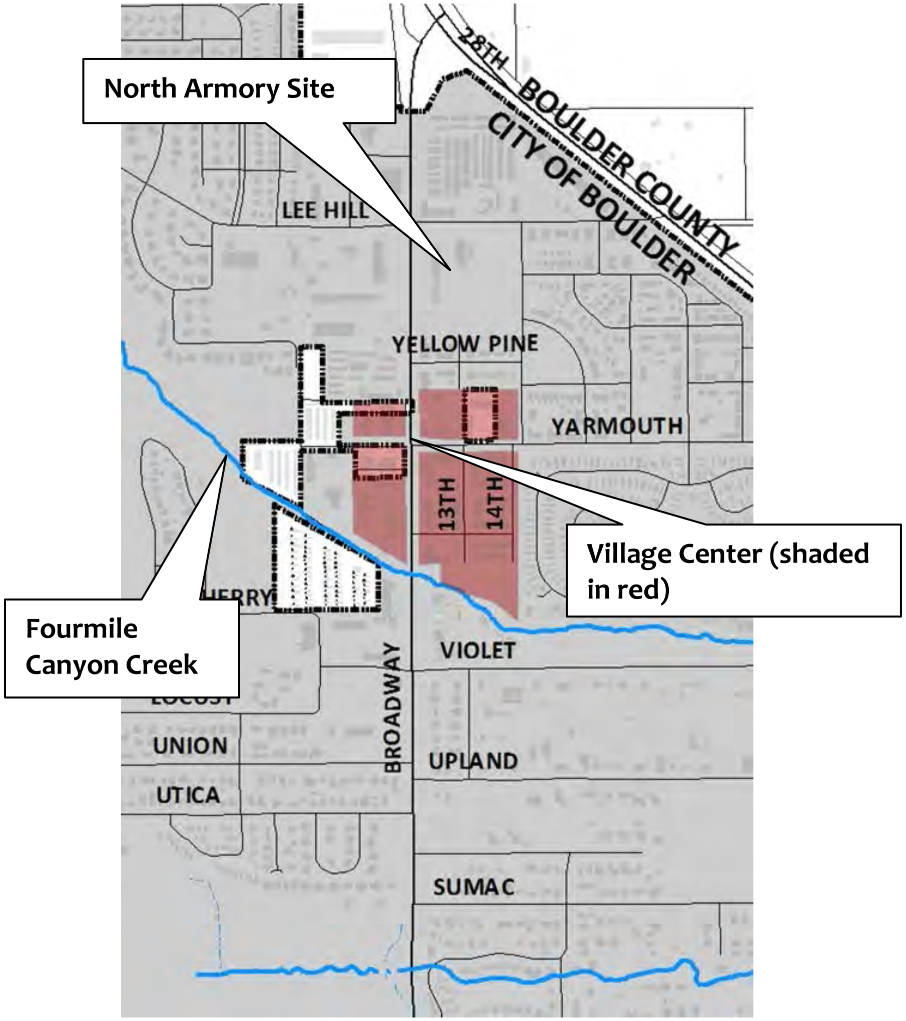
- Village Center location and anchor land uses
- Role and location of a grocery store
- Future plans for the National Armory site
- Increased prominence and role of arts in the area

Current Conditions

The North Broadway area is located at the northern gateway of the City of Boulder (Figure 2). The area is bordered by residential development and open space to the north. Industrial, storage and commercial uses can be found on the northern end of Broadway. The area transitions to the Holiday neighborhood on the east side of Broadway and Uptown Broadway. While there have been a few scattered redevelopment projects on the west side of Broadway, it retains its primarily industrial and warehouse orientation. Fourmile Canyon Creek also runs through the neighborhood, south of Yarmouth. It flooded significantly in September, 2013, and as a result, the City will conduct further assessments in the area to determine the need for any new mitigation strategies.

The upcoming North Boulder Subcommunity Plan update and this market study are intended to set the policy framework for the future of this area. Many in the community maintain their support for the original subcommunity plan. While there has been some disappointment that some of the original tenets of the plan have not been implemented, a clearer understanding of current market constraints and opportunities will enable a realistic update and implementation of the plan.

Figure 2
North Broadway Area



Source: City of Boulder

1995 North Boulder Subcommunity Plan North Broadway Vision

While the original North Boulder Subcommunity Plan (1995 Plan) encompasses a much broader geographic area in North Boulder, this market study, and the subsequent North Boulder Subcommunity Plan update is a much more focused examination and plan for the North Broadway area (Figure 2).

The 1995 Plan calls for a Village Center on both sides of Broadway at Yarmouth, extending to Fourmile Canyon Creek to the south. The Center is intended to serve as the subcommunity's core retail area and heart of the subcommunity. While the east side of the Village Center has built out, the west side has not. The areas north of the Village Center are intended for valuable service industrial uses, with some residential, neighborhood-serving small-scale retail, and office.

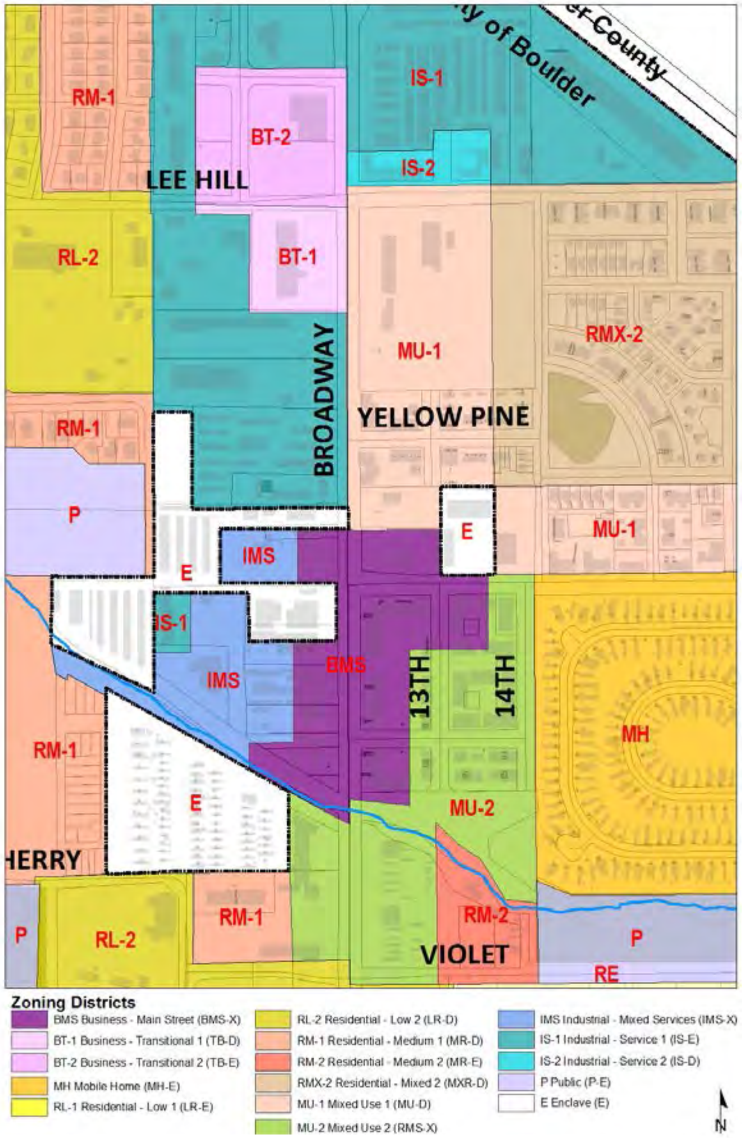
Following adoption of the 1995 Plan, the City initiated a rezoning process to align current zoning with the 1995 Plan's future land use categories on several key properties along North Broadway. These properties include the Village Center and Yarmouth North (Armory site area) areas. Table 1 below summarizes select development standards and use regulations for the three zone districts that encompass most of the Village Center area and Armory site. The zoning map for the area is shown in Figure 3.

Table 1
North Broadway Zoning Summary

<table>
<tr><th>Zoning District/Description</th><th colspan="2">Building Size Restrictions</th><th>Select Use Restrictions</th></tr>
<tr><td rowspan="4">Business Main Street (BMS)
Business areas generally anchored around a Main Street that are intended to serve the surrounding residential neighborhoods.</td><td>Maximum Building Size</td><td>15,000 s.f.</td><td rowspan="4">• Detached and attached dwelling units allowed
• Restaurants < 1,500 s.f. allowed (> 1,500 sf requires use review)
• A variety of office uses allowed
• All convenience retail allowed, over 20,000 s.f. requires use review</td></tr>
<tr><td>Floor Area Ratio (FAR)</td><td>.67</td></tr>
<tr><td>Maximum Building Height</td><td>38'</td></tr>
<tr><td>Maximum # Stories</td><td>3</td></tr>
<tr><td rowspan="4">Mixed Use 1 (MU-1)
Mixed use areas which are primarily intended to have a mix of residential and nonresidential land uses within close proximity to each other.</td><td>Maximum Building Size</td><td>15,000 s.f.</td><td rowspan="4">• Attached dwelling units allowed
• Detached dwelling units requires use review
• No retail over 5,000 square feet
• Restaurants < 1,500 s.f. allowed
• Office uses allowed provided more of the building is used for residential (otherwise requires use review)
• Retail restricted primarily to convenience retail with at least 50% of building used as residential.</td></tr>
<tr><td>Floor Area Ratio (FAR)</td><td>.6</td></tr>
<tr><td>Maximum Building Height</td><td>35'</td></tr>
<tr><td>Maximum # Stories</td><td>2</td></tr>
<tr><td>Mixed Use 2 (MU-2)
Mixed use residential areas adjacent to a redeveloping main street area, which are intended to provide a transition between a main street commercial area and established residential districts.</td><td>Maximum Building Size</td><td>15,000 s.f.</td><td>• Attached residential units allowed
• Detached residential units require use review
• Convenience retail < 2,000 s.f. allowed
• Most other retail sales < 5,000 s.f. requires use review
• No retail over 5,000 square feet
• Restaurants < 1,000 s.f. allowed
• Office uses allowed provided more of the building is used for residential (otherwise requires use review)</td></tr>
</table>

Source: City of Boulder

Figure 3
North Broadway Area Zoning Map



Source: City of Boulder

The intent of the 1995 Plan's future land use categories and subsequent rezonings was to keep the commercial services in the Village Center area at a smaller, more neighborhood scale. However, interviews indicate that the size (square footage) limitations, in particular, for retail and restaurant uses, have been disincentives to development in some areas along North Broadway.

Market Study Scope

The market study's scope examines local and regional economic and demographic trends and projections impacting the North Broadway area with a particular focus on the potential for commercial development as it supports a Village Center. It is organized into the following sections.

- *Economic and Demographic Framework* discusses relevant local, regional and market area population, demographic and employment trends and projections impacting the market potential for the North Broadway area.
- *Retail Market Analysis* examines the retail market and potential retail uses appropriate for the neighborhood.
- *Office and Flex Analysis* discusses small office potential. It also discusses the current industrial market and its role in the area's redevelopment.
- *North Broadway Barriers* discusses some of the area's redevelopment constraints as well as discusses potential tools.
- *North Boulder Subcommunity Plan Update Opportunities* summarizes and discusses overall land use potentials and next steps.

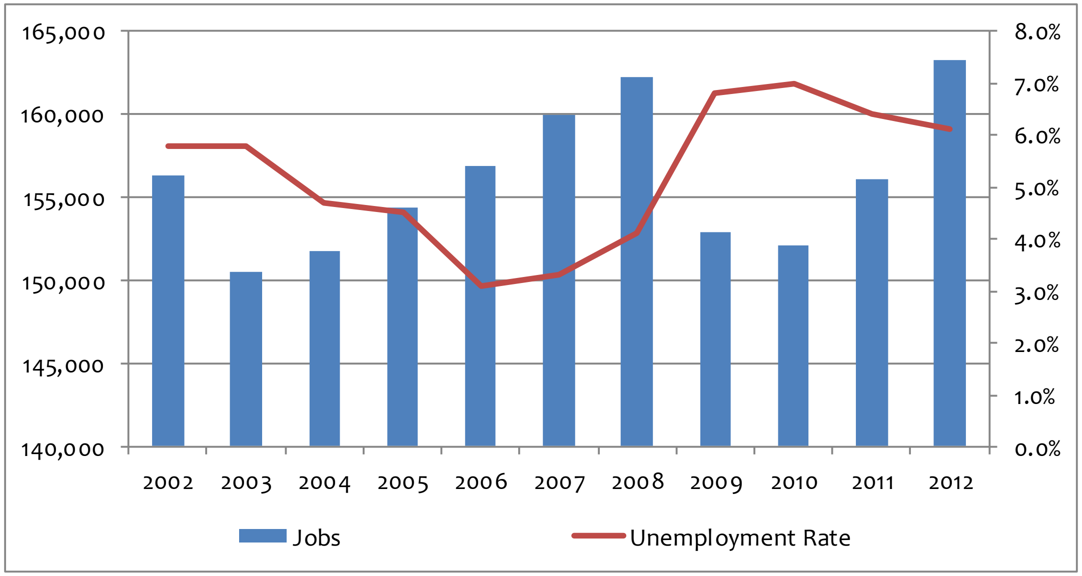
III. Economic and Demographic Framework

This section describes the economic and demographic trends for the North Broadway area, the market area(s), the City of Boulder, and the region. The background information is intended to help depict North Broadway's place within the larger economy and provide information to help inform future planning and land use opportunities in the area.

3.1 General Economic Background

Like much of the nation and the larger metropolitan region, Boulder County has seen a great fluctuation of jobs in the last decade. All aspects of the local economy have been affected, including real estate and development. After the terrorist attacks of 2001, the number of jobs declined locally and then rebounded through 2008. The County again lost jobs during the Great Recession and is now in the midst of a recovery as can be seen in Figure 4. While the national recession has officially ended, economic recovery has lagged somewhat plagued by continued relatively high levels of unemployment. Boulder County and the larger Denver-Boulder metropolitan region, in general, have fared relatively well in comparison to the rest of the country.

Figure 4
Boulder County Jobs and Unemployment Rate, 2002-2012



Source: BLS, ArLand

In 2012, there were over 160,000 jobs in the County (Table 2). More than half are located in the City. Top industries include Professional, Scientific and Technical Services, Educational Services, Health Care and Social Assistance. Significant industry clusters include aerospace, bioscience, data storage, light manufacturing, natural and organic products, outdoor recreation, photonics, renewable energy and energy research, software and tourism. A survey conducted by the Boulder Economic Council in 2012 found that the vast majority (83%) of individuals employed in the City live within a 20 to 30 minute drive or approximately 20-mile radius of the City. This would include residents commuting to homes in Boulder County north of the North Broadway area in areas such as Jamestown, Lyons, Longmont, and other communities.

Table 2
Boulder County Employment, 2002-2012

Industry	2002	2006	2012	2012 Percentage of Total	Change 2002-2012	Percentage Change 2002-2012
Agriculture, Forestry, Fishing and Hunting	400	334	374	0.2%	-26	-6.5%
Mining	237	630	250	0.2%	13	5.5%
Utilities	322	307	288	0.2%	-34	-10.6%
Construction	7,148	5,706	4,192	2.6%	-2,956	-41.4%
Manufacturing	22,345	18,652	16,824	10.3%	-5,521	-24.7%
Wholesale Trade	5,073	5,504	5,439	3.3%	366	7.2%
Retail Trade	16,555	16,162	16,455	10.1%	-100	-0.6%
Transportation and Warehousing	3,169	2,148	2,013	1.2%	-1,156	-36.5%
Information	10,822	8,863	8,683	5.3%	-2,139	-19.8%
Finance and Insurance	4,375	4,677	4,807	2.9%	432	9.9%
Real Estate and Rental and Leasing	2,848	2,409	2,271	1.4%	-577	-20.3%
Professional, Scientific, and Technical Services	18,256	21,833	24,112	14.8%	5,856	32.1%
Management of Companies and Enterprises	618	1,477	1,071	0.7%	453	73.3%
Administrative and Support and Waste Management	7,211	6,571	6,602	4.0%	-609	-8.4%
Educational Services	16,656	17,555	20,286	12.4%	3,630	21.8%
Health Care and Social Assistance	13,643	16,050	19,120	11.7%	5,477	40.1%
Arts, Entertainment, and Recreation	2,214	2,529	2,712	1.7%	498	22.5%
Accommodation and Food Services	13,483	14,141	15,645	9.6%	2,162	16.0%
Other Services (except Public Administration)	4,586	4,139	4,671	2.9%	85	1.9%
Public Administration	6,392	7,200	7,473	4.6%	1,081	16.9%
Total	**156,353**	**156,887**	**163,288**	**100.0%**	**6,935**	**4.4%**

Source: Colorado Department of Labor & Employment, BLS ArLand

3.2 Population and Demographic Characteristics

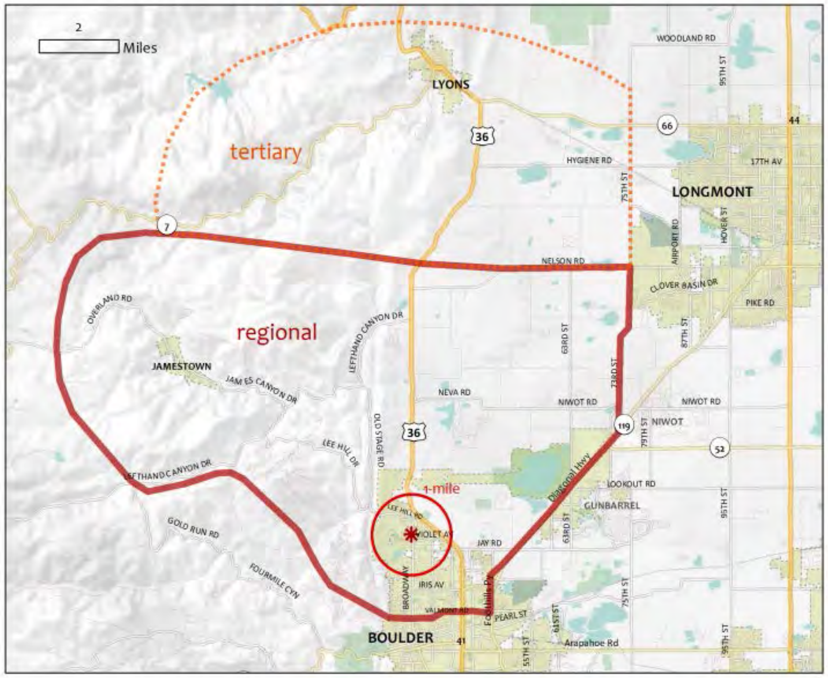
The City of Boulder is one of ten incorporated cities and towns located in Boulder County. It is the largest City and the jobs center for the immediate region. While the City attracts commuters from throughout the County, the North Broadway area is the northern gateway to the City of Boulder particularly for travelers and commuters living in Jamestown, Lyons and other County locations to the north.

For purposes of the retail market analysis, 1-Mile, Regional and Tertiary Market Areas were designated as shown in Figure 5. The market areas are the areas from which a project will draw the majority of its retail customers. Boundaries of market areas are often irregular because they can be influenced by geographic barriers, commuting patterns, and the presence of competing or complementary retailers. Typically neighborhood oriented retail encompasses a 1 to 2 mile radius, community level retail encompasses a 3 mile radius, and regional level retail encompasses an approximate 5 mile (or larger) radius around a potential site.

The 1-Mile Market Area is the area within an approximate 1-mile radius from the intersection of Broadway and Yarmouth and represents the neighborhood market area for the North Broadway area. It also represents the market area for a neighborhood-level grocery store. It includes most of the residential areas at the northern edge of the City.

A larger supermarket or grocery store would also likely attract shoppers in a wider ranging area; not only the immediate North Broadway neighborhood, but parts of the County as shown in Figure 5 designated as the Regional Market Area. It would also

Figure 5
1-Mile, Regional and Tertiary Market Areas



Source: ArLand

likely attract commuters travelling to Boulder for jobs and services. The Regional Market Area includes Jamestown, the larger north Boulder community, as well as communities in the County like Lake Valley and Lake of the Pines.

The Tertiary Market Area includes communities further north such as Lyons in Figure 5 and does not include the 1-Mile and Regional Market Area. While it is possible to shop at the local grocery stores in town, for larger items and greater selection, households in these areas are likely to travel to Boulder (as well as Longmont). Although Boulder is a jobs and services center, Longmont is attractive to these shoppers because of the presence of a full-size Walmart. Our analysis assumes that a North Broadway grocer would only be able to attract a portion of the potential spending that might be available in this area.

3.3 Market Area Demographic Characteristics

There are over 8,000 persons in 3,200 households in the 1-Mile Market Area (Table 3). The Regional Market Area (which incorporates all of the 1-Mile Market Area) is estimated at 36,800 persons in nearly 16,000 households. There are nearly 3,300 persons in 1,400 households in the Tertiary Market Area. In comparison, the City of Boulder's 2013 population is over 100,000 persons in 43,400 households. Average household sizes in the North Broadway market areas are higher, in general, than the City as a whole, which is reflective of the household nature of the area and the higher concentrations of students in other areas of the City.

Table 3
Population and Households in Market Areas, 2013

	Persons	Households	Persons / Households
1-Mile Market Area	8,185	3,231	2.6
Regional Market Area	36,830	15,926	2.4
Tertiary Market Area	3,262	1,412	2.3
City of Boulder	100,493	43,433	2.2
Boulder County	305,015	124,233	2.5

Source: Claritas, ArLand

Table 4 shows housing tenure within the 1-Mile, Regional, Tertiary Market Areas, the City of Boulder, and Boulder County. Although there is rental housing in the immediate 1-Mile Market Area, the vast majority of housing is owner occupied. Owner occupancy in the market areas and the County is much higher than the City as a whole, which is about 50% owner-occupied and 50% renter-occupied.

Table 4
Housing Tenure

	Owner Occupied	Renter Occupied
1-Mile Market Area	87.3%	12.7%
Regional Market Area	71.0%	29.0%
Tertiary Market Area	77.5%	22.5%
City of Boulder	50.1%	49.9%
Boulder County	64.4%	35.6%

Source: Claritas, ArLand

Median household incomes are shown in Table 5 and income breakdowns are shown in Figure 6. In general, market area household incomes are much higher than the City as a whole. Average and median household incomes in the 1-Mile Market Area are estimated at nearly $112,000, indicating the presence of a number of higher income households within this market area.

Figure 6 indicates that the greatest percentage of households in all areas earn between $100,000 and $200,000 (2013).

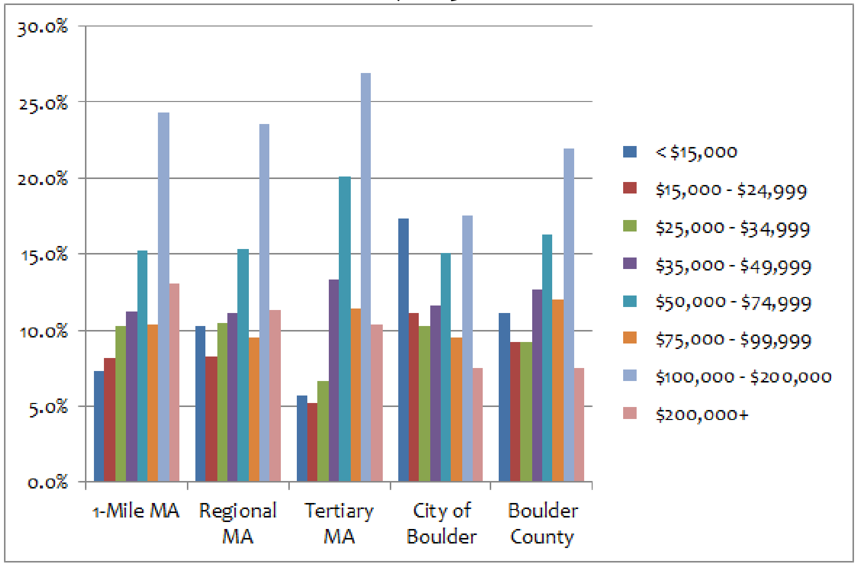
Table 5
Median Household Incomes, 2013

	Median HH Income	Avg HH Income
1-Mile Market Area	$71,314	$111,816
Regional Market Area	$65,929	$103,865
Tertiary Market Area	$73,544	$106,775
City of Boulder *	$56,274	$84,225
Boulder County *	$66,989	$92,308

Source: Claritas, ArLand

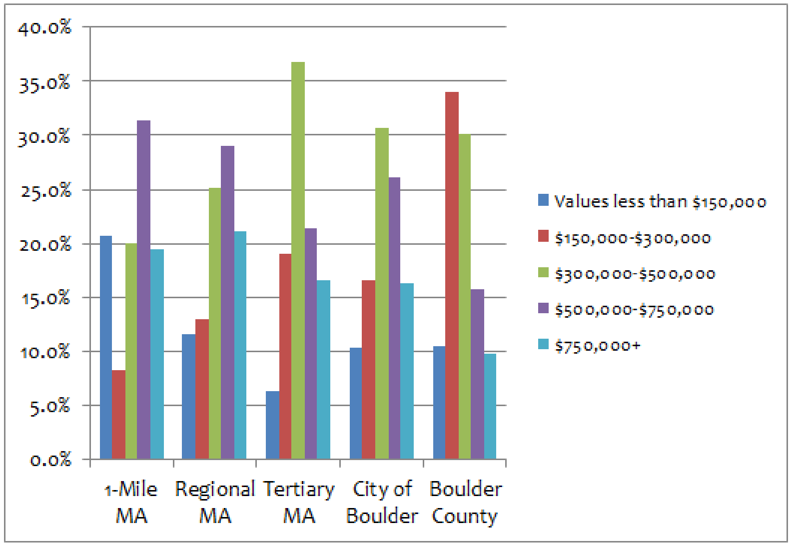
* 2012 American Community Survey

Figure 6
Household Income Breakdowns, 2013



Source: Claritas, ArLand

Figure 7
Owner-Occupied Housing Values, 2013



Source: Claritas, ArLand

Figure 7 above indicates that the highest percentage of owner occupied houses in the 1-Mile and Regional Market Areas are homes valued between $500,000 and $750,000. Both Market Areas have a significant percentage of homes valued at $300,000 and up. The 1-Mile Market Area also has a high percentage of homes valued at less than $150,000.

Table 6 shows median owner occupied housing values. Of all the market areas analyzed, the 1-Mile Market Area has the highest values.

Table 6
Median Owner-Occupied Housing Values, 2013

	Median Owner-Occupied Housing Values
1-Mile Market Area	$507,034
Regional Market Area	$501,943
Tertiary Market Area	$425,330
City of Boulder	$447,204
Boulder County	$329,450

Source: Claritas, ArLand

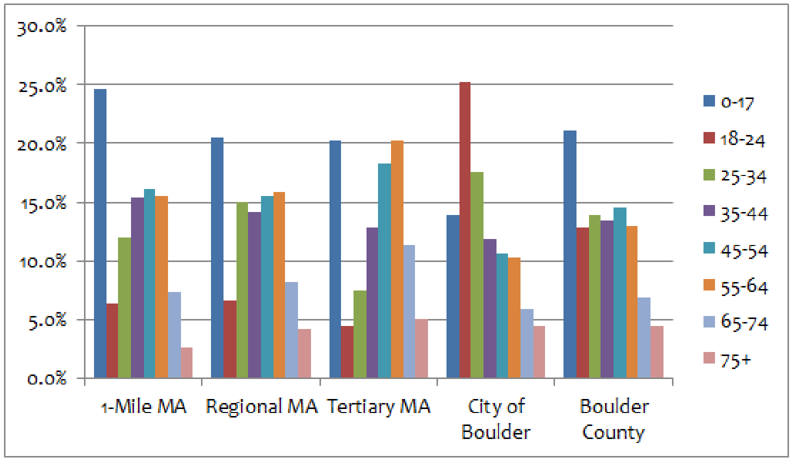
The median ages in the market areas are older than the City and County, respectively, as shown in Table 7 at 39.5 in the 1-Mile Market Area and over 40 in the Regional and Tertiary Market Areas.

Table 7
Median Age, 2013

	Median Age
1-Mile Market Area	39.5
Regional Market Area	40.5
Tertiary Market Area	47.7
City of Boulder	31.1
Boulder County	36.7

Source: Claritas, ArLand

Figure 8
Age Breakdowns



Source: Claritas

Figure 8 shows that the 1-Mile Market Area has a much higher percentage of children between 0-17 relative to the rest of the population in the area. The City's university population shows up in the high percentage of residents in the 18-24 age categories.

Figure 9
Race and Ethnicity, 2013

	1-Mile Market Area	Regional Market Area	Tertiary Market Area	City of Boulder	Boulder County
White	82.5%	87.8%	94.0%	87.7%	86.6%
Black	0.8%	0.7%	0.4%	0.8%	0.8%
American Indian	0.5%	0.5%	0.3%	0.4%	0.6%
Asian/Pacific Islander	4.4%	3.4%	1.5%	4.9%	4.4%
Other / Two or more	11.8%	7.6%	3.7%	6.2%	7.5%
Hispanic Origin*	18.5%	11.5%	5.5%	8.9%	13.9%

Source: Claritas, ArLand

* can be of any race

The 1-Mile Market Area has a greater percentage of residents of Hispanic origin compared to the other market areas, the City and County, as a whole (Figure 9).

3.4 NoBo Psychographics

Psychographics is a term to describe characteristics of people and neighborhoods, which instead of being purely demographic, reflect attitudes, interests, opinion, and lifestyles. Nielsen / Claritas is a leading system for characterizing neighborhoods into one of 66 distinct market segments. Psychographic studies of individuals or communities can be valuable in the fields of marketing, demographics, opinion research, and social research. Commercial and residential developers are increasingly interested in understanding a community's psychographic profile. The categories and terms described below are used to describe psychographic segments nationally. The psychographic information is derived from Census data, leading consumer surveys, and other public and private sources of demographic and consumer information.

Households living in the NoBo neighborhood (1-Mile Radius) fall into the following market segments:

- *The Affluentials*: These residents enjoy comfortable, suburban lifestyles. The median incomes and home values are well above the U.S. median values and members of this group tend to have college degrees and white collar jobs. The Affluentials are big fans of health foods, computer equipment, consumer electronics, and the like. They are drawn to comfortable homes and apartments with a manageable commute to downtown jobs, restaurants, and entertainment.
- *Inner Suburbs*: Residents tend to be high school educated and downscale. This group is racially diverse, divided evenly between homeowners and renters, and filled with households that are either young or aging in place.
- *Elite Suburbs*: The most affluent social group, this group makes six figure incomes, have post graduate degrees, own single family homes, and are in managerial and professional occupations. They are home to America's up and coming business class. They rank highly for owning a small business and having a home office.
- *Middleburbs*: The group includes a mix of homeowners and renters as well as high school and college graduates. They tend to have good jobs and discretionary incomes to visit casual-dining restaurants, shop at midscale department restaurants, and travel across the U.S. and Canada.
- *Landed Gentry*: This group consists of wealthy Americans who migrated to the smaller boomtowns. Many of the households contain Boomer families and couples with college degrees, expansive homes and professional jobs. They're twice as likely as average Americans to telecommute. They can afford to spend heavily on consumer electronics, wireless and computer technology, and the like. This group tries to maintain a balanced lifestyle between high power jobs and laid-back leisure.

3.5 Employment and Commercial Real Estate Characteristics

According to Info USA, there are approximately 1,200 to 1,300 full- and part-time employees in the commercial areas in an approximately ½ mile radius from the intersection of Broadway and Yarmouth.[4] The commercial areas include the newer commercial east of Broadway, found mostly in the Holiday neighborhood and Uptown Broadway developments, as well as the older, industrial, warehouse area west of Broadway. Most of the businesses are small, averaging 6 or fewer employees each.

There are several landscaping and construction related firms in the area. There is manufacturing in the area although much of it has transitioned to artists working with metals, textiles, and leather. Namaste Solar is included in the Wholesale Trade category, along with several other wholesale businesses in the area. Within the retail category, restaurants have hired the most full- and part-time employees at an estimated 165 workers, according to Table 8. There are a number of businesses in the miscellaneous retail categories with many of the artists falling into these categories. There is a 1st Bank, along with small offices of insurance agents, financial advisors, and others in the Finance category. There are a number of different services in the area, including a number of personal services as well as business services, auto repair and others.

[4] The ½ mile radius was chosen here to primarily analyze employment in the immediate North Broadway corridor area.

Table 8
Full and Part Time Employment at North Broadway Businesses, 2013

Industries	2013 Estimated Employment	Industries	2013 Estimated Employment
Agricultural Services	33	Finance, Insurance, Real Estate	60
Construction	61	Services	553
Manufacturing	19	Lodging	40
Food	1	Personal Services	49
Printing, Publishing	2	Business Services	42
Leather / Textile Products	11	Auto Repair	69
Fabricated Metals	1	Misc. Repair	2
Machinery	3	Misc. Entertainment	72
Transportation Equipment	1	Health Services	36
Transportation		Legal Services	5
Motor Freight Transportation & Warehousing	33	Educational Services	74
Wholesale Trade	106	Social Services	100
Retail Trade	311	Museums / Galleries	2
Building Materials	14	Membership Organizations	2
General Merchandise	6	Engineers, Architects, Accountants	54
Food	33	Misc. Services	6
Auto Parts	11	Public Administration	93
Clothing	2		
Furniture and furnishings	28		
Restaurants	165		
Misc. Retail	52		
		Total	**1,269**

Source: InfoUSA, ArLand

Note: Businesses in an approximately 1/2 mile radius from the Yarmouth and Broadway intersections.

3.6 Population and Household Forecasts

In order to begin developing projections for future supportable grocery and other commercial development, forecasts for the market areas are developed based on population, household, and employment projections. Table 9 shows the population and households in the 1-Mile, Regional, and Tertiary Market Areas and the forecasts for population and household growth in these areas. Any developments currently under construction or in the planning pipeline are not included in the 2013 estimates. Figure 10 and Table 10 (following) provides a summary of the key developments under review or approved for construction.

Table 9
1-Mile, Regional, and Tertiary Market Areas Population and Household Forecasts, 2013-2035

	2013	2035	2013-2035	CAGR 2013-2035
1 Mile Market Area				
Population	8,185	9,386	1,201	0.6%
Households	3,231	3,787	556	0.7%
Persons/ HH	2.5	2.5	2.2	
Regional Market Area				
Population	36,830	38,731	1,901	0.2%
Households	15,926	17,179	1,253	0.3%
Persons/ HH	2.4	2.3	1.5	
Tertiary Market Area				
Population	3,262	3,432	170	0.2%
Households	1,412	1,517	105	0.3%
Persons/ HH	2.3	2.3	1.6	

Source: Claritas, DRCOG, City of Boulder, ArLand

Current projections show relatively modest additions to the household count through 2035. The 1-Mile Market Area is projected to add approximately 550 new households, while the Regional Market Area is projected to add almost 1,300 households. Forecast annual growth rates are less than 1% per year.

Figure 10
Major Developments in North Broadway Area (1995-2013)

Source: City of Boulder, ArLand

Table 10
Major Developments in North Broadway Area (1995-2013)

Map ID	Name	Date	Approx. Site Size	Description
1	Holiday	2003-2005	27 acres	324 residential units (187 market rate units and 137 permanently affordable units), 55,000 square feet of non-residential space and a 1.7 acre park
2	Dakota Ridge	2001-present	42 acres	420 residential units (300 market rate and 120 permanently affordable units.)
3	Uptown Broadway	2003, 2008	8.5 acres	223 residential units (185 market rate and 38 permanently affordable) and 40,337 square feet of mixed use commercial space
4	Westview	2011-2012	1 acre	34 pemanently affordable units
5	Foothills	2001-2002	5 acres	74 residential units (22 market rate and 52 permanently affordable units)
UNDER REVIEW / UNDER CONSTRUCTION				
6	820 Lee Hill	2014	6 acres	32 single family detached homes
7	Violet Crossing	2013	4.7 acres	98 market rate residential units
8	1000 Rosewood	2013	4.5 acres	18 residential units (16 single family units, 2 duplex units), 50% permanently affordable
9	1175 Lee Hill	2014	1.2 acres	31 residential units (market rate and 31 permanently affordable transitional housing units)
Units Under Review / Under Construction				**179**

Source: City of Boulder

Between 1995 and 2013, a significant number of residential units were added to the North Broadway area as shown in Figure 10 in Map ID numbers 1 through 5. These select developments added 1,076 residential units to the North Broadway area during this time period.

Areas 6 through 10 in Figure 10 and Table 10 show 179 units in planned residential projects that are currently under review, or are under construction.

3.7 Employment Forecasts

Employment forecasts are also relatively modest for the area. Table 11 indicates that the market areas are forecast for jobs growth with the addition of approximately 117 jobs in the 1-Mile Market Area, 247 jobs in the Regional Market Area and 36 jobs in the Tertiary Market Area. There is a slight discrepancy between the estimates for North Broadway jobs found in Table 9 and 1-Mile Market Area estimates because of slightly different geographic areas.

Table 11
1-Mile, Regional and Tertiary Market Areas Employment Forecasts, 2013-2035

	2013	2035	2013-2035	CAGR 2013-2035
1 Mile Market Area	1,570	1,687	117	0.3%
Regional Market Area	17,989	18,236	247	0.1%
Tertiary Market Area	964	1,000	36	0.2%

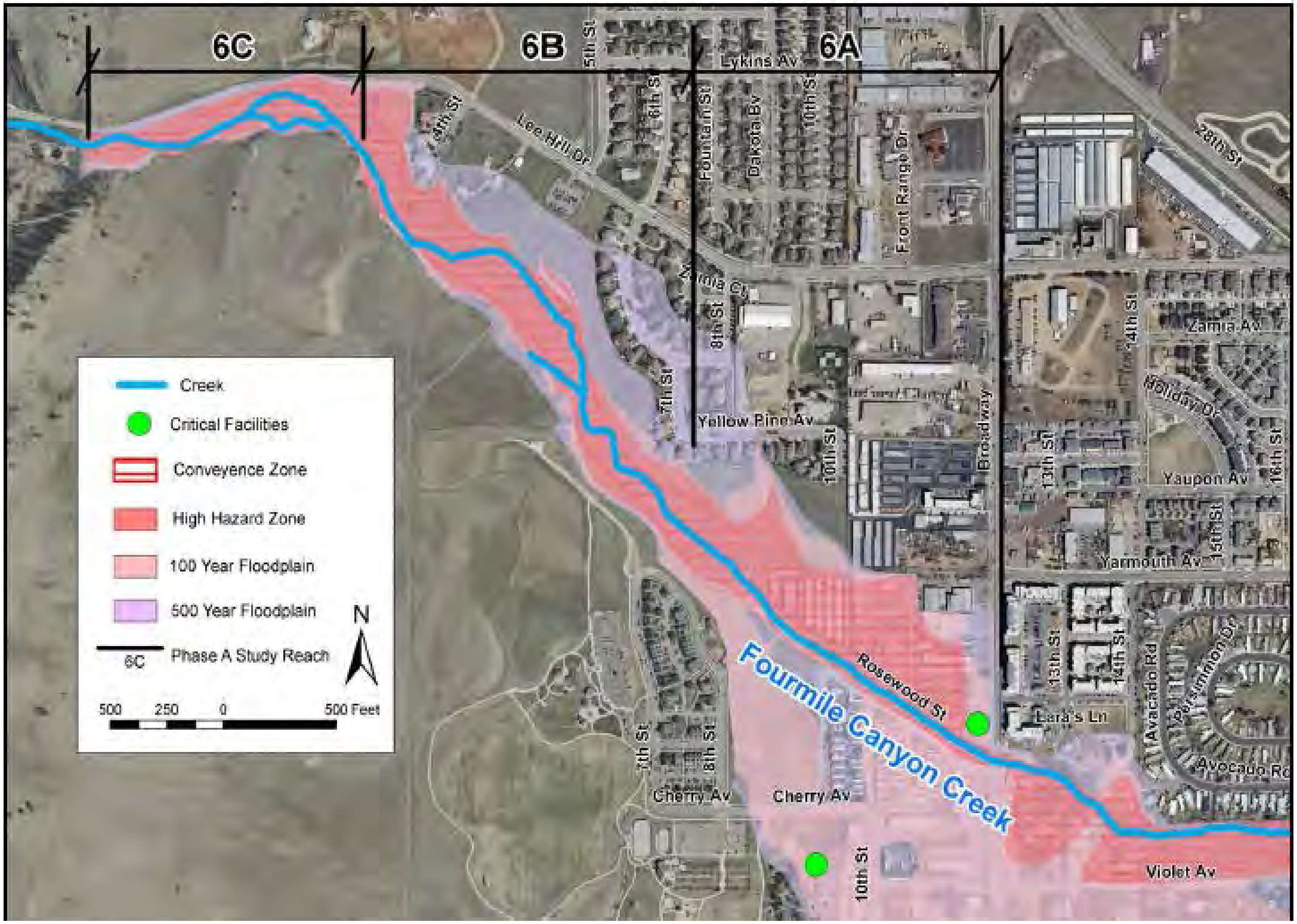
Source: DRCOG, ArLand

3.8 High Hazard Zone

Figure 11 depicts the High Hazard Zone in the North Broadway area which encompasses a significant portion of the area north of Rosewood Street. There are a variety of storage and industrial uses and artists located in the area. No redevelopment is allowed in the high hazard areas without significant flood mitigation.

Figure 11
High Hazard Zones in North Broadway

Figure 10.2 Existing Conditions Fourmile Canyon Creek Reaches 6C, 6B, 6A



Source: City of Boulder

The flood of September 2013 affected a number of properties in the area. The City is assessing the event and will reevaluate the need for remapping and mitigation strategies along Fourmile Canyon Creek. The City's estimated costs for flood mitigation in the Village Center area west of Broadway (before the flood in 2008) were about $2.7 million with an additional approximately $3.1 million in estimated building flood mitigation costs. It is unclear how the September 2013 flood event will impact these estimates. The City has no current funds to help offset the costs of flood mitigation. At this time, anyone interested in redeveloping the area would be fully responsible for offsetting these expenses up-front.

Although there are a number of reasons why the area west of Broadway has not redeveloped, the lack of funding to pay for flood plain improvements is a significant barrier. Although Violet Crossing, a 98-unit multi-family apartment project at Violet and Broadway is currently under construction, some of the public flood plain mitigation funds used to improve the property were agreed upon and allocated a number of years ago. Similar funds would be unavailable now for any new flood plain improvements since the program is now focused on mitigation of flood hazards associated with existing development.

IV. Retail Market Analysis

This section discusses the retail market potential for the North Broadway area. It examines current and future retail demand and supply in the market areas.

4.1 Retail Demand Analysis

Retail demand is calculated by:

- Estimating households and incomes in the market area in order to derive total incomes potentially available for retail expenditures; and,
- Based on current expenditure patterns, calculating the income percentage spent in retail categories by residents within the market area. This results in estimated demand by retail category.

By comparing estimated demand (both current and future) to an estimate of supply or sales by retail category, an estimate of unmet retail demand can be calculated by:

- Subtracting supply from demand to obtain an estimate of unmet demand; and
- Incorporating sales per square foot averages by retail category in order to arrive at the approximate square footage of unmet retail demand.

The estimate of unmet retail demand is considered by retailers along with other criteria in making location decisions. Retailers also consider other factors including the overall retail project format, synergy with other tenants, and location relative to other stores. Retailers locate in different types of centers, and each retailer has its own location criteria.

The next sections will focus on demand and supply for a grocery store in the neighborhood first, followed by a discussion of general retail in the North Broadway area.

4.2 Current and Future Demand for North Broadway Area Grocery Store

Table 12 shows the estimated total household incomes in the 1-Mile Market Area currently, in 2020, 2025, and 2035, based on estimated potential growth in households and average household incomes. The analysis conservatively estimates that average household incomes will remain constant. Total incomes potentially available, a portion of which will be available for retail expenditures, are currently $361 million and projected to increase to (in today's dollars) $423 million by 2035.

Table 12
Total Household Incomes in the 1-Mile Market Area

	2013	2020	2025	2035	Growth 2013-2035	CAGR % Growth 2013-2035
1 Mile Market Area						
Households	3,231	3,377	3,494	3,787	556	0.7%
Average Household Income	$111,816	$111,816	$111,816	$111,816	$111,816	--
Total Household Incomes	$361,277,496	$377,612,485	$390,728,170	$423,490,663	$62,213,167	0.7%

Source: DRCOG, City of Boulder, ArLand

Table 13 compares expenditure potential to retail capture by existing grocery store retailers to estimate unmet retail demand for groceries. Demand is calculated by multiplying total household incomes by potential household expenditures for groceries. An estimate of current sales is subtracted out. Table 13 shows that there is current unmet demand for 17,000 to 28,000 square feet of grocery store space. By 2035, that increases to 23,000 to 34,000 square feet.

Table 13
Grocery Demand in 1-Mile Market Area

2013 Households	3,231
Avg Household Income	$111,816
Total Household Income	$361,277,496
Annual HH Growth Rate through 2035	0.7%
% Expenditures on Groceries	5.50%
Grocery Demand	$19,870,262
Est. Sales	$9,613,571
Current Retail Void	$10,256,691
Est. Sales / SF	$450
Current Retail Void (S.F.)	*17,094 - 28,491*
Additional Demand from Household Growth (S.F.)	*7,604*
Total Demand 2035 (S.F.)	*22,797 - 33,796*

Source: Claritas, Census of Retail Trade for CO, ULI, ArLand

4.3 Current and Future Demand for Full-Service Grocery

Table 14 shows the estimated total household incomes in the Regional and Tertiary Market Areas, in 2020, 2025, and 2035, based on estimated potential growth in households and average household incomes. The Regional and Tertiary Market Areas represent the areas that a conventional full service grocery store (60,000 square foot store and larger) would examine as part of their potential customer base.

The analysis conservatively estimates that average household incomes will remain constant at the household incomes shown. Total incomes in the Regional Market Area, a portion of which will be available for grocery store expenditures are currently $1.6 billion increasing to (in today's dollars) nearly $1.8 billion by 2035. In the Tertiary Market Area, total incomes estimated (based on ¼ of the households in the Tertiary Market Area) are $37 million increasing to over $40 million by 2035.

Table 14
Total Household Incomes in the Regional and Tertiary Market Areas

	2013	2020	2025	2035	Growth 2013-2035	CAGR % Growth 2013-2035
Regional Market Area						
Households	15,926	16,256	16,519	17,179	1,253	0.3%
Average Household Income	$103,865	$103,865	$103,865	$103,865	$103,865	--
Total Household Incomes	$1,654,153,990	$1,688,434,697	$1,715,793,338	$1,784,276,900	$130,122,910	0.3%
Tertiary Market Area (1/4 of Households)						
Households	353	360	366	379	26	0.3%
Average Household Income	$106,775	$106,775	$106,775	$106,775	$106,775	--
Total Household Incomes	$37,691,575	$38,440,414	$39,033,245	$40,499,676	$2,808,101	0.3%

Source: DRCOG, ArLand

Table 15
Grocery Store Demand in Regional and Tertiary Market Areas

2013 Households	16,014
Avg Household Income	$103,881
Total Household Income	$1,663,576,884
Annual HH Growth Rate through 2035	0.3%
% Expenditures on Groceries	5.50%
Grocery Demand	$91,496,729
Est. Sales	$76,068,000
Current Retail Void	$15,428,729
Est. Sales / SF	$450
Current Retail Void (S.F.)	*25,714 - 42,858*
Additional Demand from Household Growth (S.F.)	*35,013*
Total Demand 2035 (S.F.)	*51,974 - 86,624*

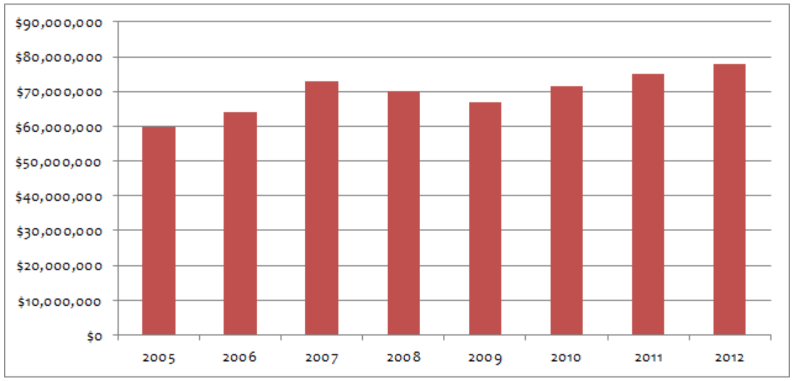
Source: Claritas, Census of Retail Trade for CO, ULI, ArLand

The analysis in Table 15 includes an estimate of Walmart Neighborhood grocery sales. It indicates that there is a current retail grocery void of approximately 25,700 square feet to 42,900 square feet in the Regional and Tertiary Market Areas. By 2035, assuming no additional grocery store in the wider regional area, that demand increases to 52,000 square feet to 86,600 square feet.

4.4 Retail Supply Characteristics

Despite a dip in sales tax collections in 2009 corresponding to the period of the Great Recession, the City's retail sales tax collections have rebounded according to Figure 12. City sales taxes are 3.41% of retail sales revenues in the City of Boulder. Retail in the North Broadway area has generated 1.5% to 1.7% of overall City sales tax revenues in the last seven years.

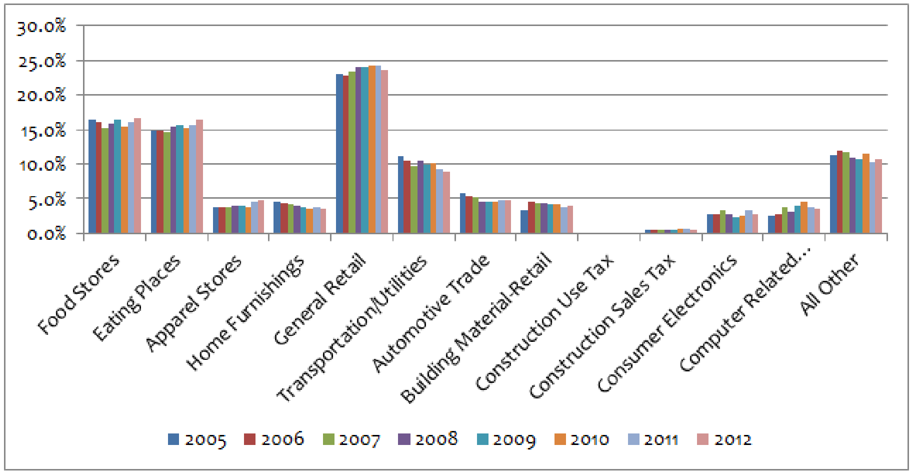
Figure 12
City of Boulder Sales Tax Collections, 2005-2012



Source: City of Boulder, ArLand

Food and grocery stores are a consistent source of sales tax revenues for the City of Boulder. While General Retail generates the majority of sales taxes, food stores (groceries) and eating places (restaurants) fall closely behind (Figure 13).

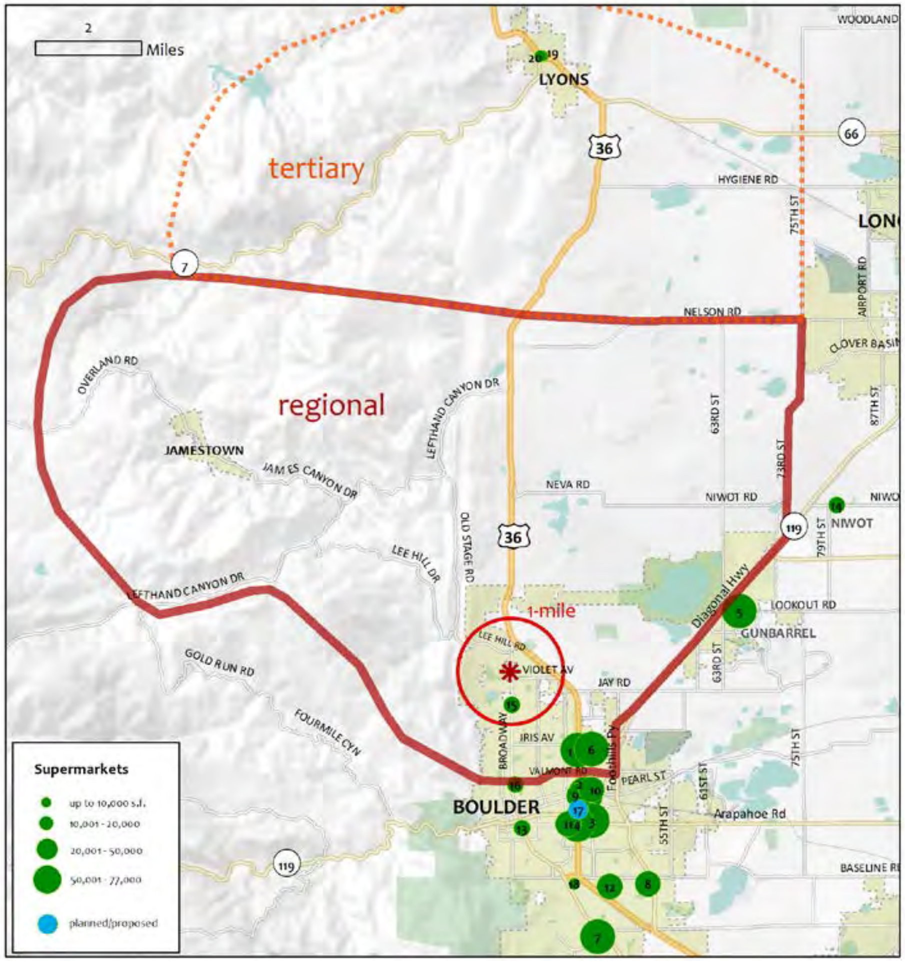
Figure 13
City of Boulder Sales Tax Collections by Industry, 2005-2012



Source: City of Boulder, ArLand

Figure 14 shows grocery store supply in the area. The significant amount of grocery, centrally located and in Boulder's major commercial corridors south and east of the North Broadway area highlights why some residents feel there is a grocery store void in the neighborhood. At the same time, these grocery stores serve a wide-ranging area, including North Broadway households.

Figure 14
Grocery Stores and Supermarkets



Source: ArLand

Table 16
Grocery Stores and Supermarkets

ID	Name	Address	City	Est. Grocery SF
1	Safeway	3325 28th St.	Boulder	77,000
2	Whole Foods Market	2905 Pearl St.	Boulder	77,000
3	King Soopers	1650 30th St.	Boulder	58,000
4	Safeway	2798 Arapahoe Ave.	Boulder	55,000
5	King Soopers	6550 Lookout Rd.	Boulder	55,000
6	Walmart Neighborhood Market	3303 30th St.	Boulder	52,000
7	King Soopers	4600 Table Mesa Dr.	Boulder	52,000
8	Safeway	4800 Baseline	Boulder	50,000
9	Target (with Fresh Grocery)	2800 Pearl St.	Boulder	30,000
10	Natural Grocers/Vitamin Cottage	2355 30th St.	Boulder	25,000
11	Sprouts	2525 Arapahoe Ave.	Boulder	25,000
12	Sprouts	2950 Baseline	Boulder	24,000
13	Alfalfa's Market	1651 Broadway St.	Boulder	20,000
14	Niwot Market	7980 Niwot Rd.	Longmont	15,000
15	Lucky's Market	3960 Broadway St.	Boulder	14,000
16	Ideal Market (Whole Foods)	1275 Alpine Ave.	Boulder	14,000
17	Trader Joe's	28th & Walnut.	Boulder	14,000
18	Whole Foods	2584 Baseline Dr.	Boulder	10,000
19	St. Vrain Market, Deli, Bakery	455 Main St.	Lyons	3,000
20	Steamboat Mtn. Natural Foods	454 Main St.	Lyons	3,000
	TOTAL			673,000

Source: ArLand, City of Boulder

4.5 Impact of New Supermarket / Grocer

There is over 670,000 square feet of grocery store space in the City of Boulder and in nearby communities (in the Regional and Tertiary Market Areas) in an estimated 20 grocery stores and supermarkets. Interviews indicate concern over the great number of grocery options in the Boulder market and the impact that new stores will have, particularly on the independent grocery stores. There has also been concern expressed about the proximity of open space and fewer numbers of households in the North Broadway area.

- Grocery stores prefer to be located in areas where there are households completely surrounding them. North Broadway is at the edge of North Boulder and adjacent to a significant amount of open space. Any larger or full-service grocery store would need to depend on potential grocery store demand and regular shopping from households in the Regional and Tertiary Market Areas. While some of these households have been affected by the flood of September 2013, the analysis assumes that households will be rebuilt in the same communities.
- There are fewer households in the immediate North Broadway area. As a point of comparison, Lucky’s is approximately one mile from the intersection of Broadway and Yarmouth (Table 17). Some of the households in Lucky’s 1-Mile ring overlap with the count of households in the 1-Mile ring around Broadway and Yarmouth. There are nearly 1,400 more households in the Lucky’s 1-Mile ring compared to the number of households in the 1-Mile ring at the intersection of Broadway and Yarmouth. There are more than 5,500 households in the same geographic area around the Ideal Market.
- Communities outside of Boulder, such as Louisville and Longmont are building their own specialty and independent grocery stores. Although this potentially reduces traffic and trip generation, it also means that these shoppers are not purchasing as much at Boulder outlets as they may have been previously when these stores did not exist in their areas.

Table 17
Households in 1-Mile Radius Around Independent Grocery Stores

	Households in 1- Mile Radius	Difference in Household Numbers
Intersection of Broadway and Yarmouth	3,231	--
Lucky's Market	4,625	1,394
Ideal Market	8,806	5,575
Alfalfa's Market	10,789	7,558

Source: Claritas, ArLand

A gravity model approach was used to help estimate the likely impacts on nearby competing supermarkets of a new Broadway store. A new grocery store locating along north Broadway in Boulder would draw only a small fraction of its eventual customer base from future household growth, which is projected to be relatively slow. Most spending would instead come from a shift in spending patterns already present in the market area. In other words, some grocery spending currently going to other existing market area stores would be shifted to a new Broadway store based, primarily, on convenience and product selection.

This spatially-driven technique begins with an over-simplification of the competitive environment. Only households within the Regional Market Area are considered as potential customers and only those stores within the market area are considered as potential destinations. Obviously, household shopping behavior differs, however, of all the retail categories, households tend to regularly enjoy going to a neighborhood grocery store or supermarket out of habit and familiarity. It is assumed that households will allocate their supermarket spending across the handful of competing stores based solely on the distance to each store and the size (attractiveness) of each store. The model is termed a gravity model because, gravitational "pull" decreases as a function of the distance. Thus, nearby stores are much more likely to attract spending than more distant stores of a similar size.

Table 18 shows the current estimated share of market by the grocery stores in the Regional Market Area. It should be noted that these are estimates based on size of store, location of market area households and their willingness to spend at these stores based on the geographic proximity to the store.

Table 18
Current Market Area Grocery Store Estimated Share of Sales in the Regional Market Area

Name	Estimated SF	Est. Sales from Market Area	Market Area Share
Lucky's Market	13,000	$9,618,000	11%
Ideal Market	14,000	$8,400,000	9%
Safeway	77,000	$34,650,000	38%
Walmart Nbhd. Mkt.	52,000	$23,400,000	26%
New Market Area Store	0	$0	0%
Stores Outside Market Area		$15,428,729	17%
Total	**156,000**	**$91,496,729**	100%

Source: ArLand

It is assumed that there is over $90 million of grocery store spending available across these stores in the market area based on households, incomes and spending of households in the market area. Stores and other grocery venues outside of the immediate market area at grocery stores not listed also receive some market area spending.

Assuming that a new store of approximately 40,000 square feet was constructed in the market and assuming that a new store would fare relatively well in capturing market share, Table 19 assumes that all existing stores would be equally impacted[5]. In reality, Lucky's would potentially be hardest hit, given its geographic proximity and smaller size. However, in this more conservative model, all stores would suffer equally with a 20% decrease in sales. Lucky's has estimated that a new store would affect revenues negatively by up to 25%.

[5] A 40,000 square foot store was used as an example as it represents the average size of the stores listed in the table.

Table 19
Potential Sales Impact of New Grocery Store

Name	Estimated SF	Est. Sales from Trade Area Households	Market Area Share of Sales	Change in Sales
Lucky's Market	13,000	$7,739,269	8%	-20%
Ideal Market	14,000	$6,759,187	7%	-20%
Safeway	77,000	$27,881,647	30%	-20%
Walmart Nbhd. Mkt.	52,000	$18,829,164	21%	-20%
New Market Area Store	**40,000**	**$17,872,501**	20%	N/A
Stores Outside Market Area		$12,414,960	14%	-20%
Total	**196,000**	**$91,496,729**	100%	

Source: ArLand

4.6 North Broadway Inventory

Table 20 summarizes the retail tenants currently in the North Broadway area by type of business in the Holiday and Uptown Broadway developments. While there are a few scattered retail establishments west of Broadway, they tend to be construction and auto oriented establishments. Some of the artists located in these areas sell from their locations, although the majority of them do not use these locations as primary retail outlets. The newer retail space in the area (east of Broadway) houses office, business and personal services, and restaurant uses. There is a small specialty retail niche in fitness and cycling serving patrons of the sport. North Broadway, particularly Amante's Coffee, is a convenient de-facto gathering spot for cycling enthusiasts.

Table 20
Commercial Establishments North to South (in the Uptown Broadway and Holiday Developments)

Business Name	Category
Acqua Fleur Day Spa	Personal Service
MIG Winston	Business Service
Spruce Café	Restaurant
Winter & Company	Business Service
Alice Cohen CPA	Personal / Business Service
North Boulder Studio	Personal / Business Service
Oblique	Business Service
North Boulder Chiropractic	Personal / Business Service
Lawrence & Associates CPAs	Personal / Business Service
Caledonia Wealth Management	Personal / Business Service
Proto's Pizzeria	Restaurant
Iron Works Fitness	Wellness
Red Pine Studios	Business Service
Bacco Mozzarella Bar	Restaurant
Amante Coffee	Restaurant
Boulder Cycle Sport	Wellness
4580 Restaurant	Restaurant
Subway	Restaurant
1st Bank	Personal / Business Service
FasCat Coaching / Performance Cycling	Wellness / Retail
Gamers Guild	Retail
Chicago Hair	Personal Service
Pupusas Restaurant	Restaurant
Boulder Cycle Sport	Wellness / Retail
Boulder Dental Arts	Personal Service
Red Tail Wellness	Wellness

Source: ArLand

The Holiday Neighborhood

The Holiday neighborhood is a 324-unit community in the North Broadway area that was developed by Boulder Housing Partners in partnership with seven developers and a variety of non-profit organizations on a site in the City that was originally slated for development as big box retail.

Main Street North is a mixed-use development at the gateway to the Holiday Neighborhood with buildings and uses arranged around Broadway and Yellow Pine Avenue. The non-residential space is comprised of approximately 55,000 square feet. Commercial tenants include Spruce Confections, Proto's Pizzeria, and other shops and offices. Well-defined common areas provide places for café seating and outdoor gathering. The architecture provides a traditional "Main Street" two-story scale. Office and retail spaces range in size from as small as 630 square feet to as large as 4,000 square feet.

Uptown Broadway

In 2003, while the Holiday neighborhood was building out, Uptown Broadway also commenced development on the east side of Broadway and Yarmouth. The development is comprised of approximately 40,000 square feet of mixed use commercial space and 233 residential units. Although the residential development was successful, the retail struggled for a variety of reasons. The commercial part of the development was subsequently converted to retail condos. Although approximately 800 square feet remains to be sold and is currently vacant, it has taken a number of years for the commercial space to be fully occupied.

Speculation on why the commercial development has been unsuccessful include: lack of critical mass of retail in the area, zoning restrictions on size of retail and lack of easy parking, among other reasons.

4.7 Retail Demand without an Anchor

The relatively slow absorption of the Uptown Broadway neighborhood has been a concern and recently approved projects such as Violet Crossing and Westview have little or no ground floor commercial space. Without a strong retail anchor, more area households, or activities to help bring people into the neighborhood to shop, future retail demand would tend to be more limited with slow absorption of space.

Tables 21 and 22 shows potential retail demand in the neighborhood or 1-Mile Market Area.

Table 21
Retail Demand in 1-Mile Market Area

2013 Households	3,231
Avg Household Income	$111,816
Total Household Income	$361,277,496
Annual HH Growth Rate	0.7%

Category	% Retail Expenditures [1]	Demand (retail potential)	Est. Sales	Current Retail Void ($)	Est. Sales / s.f. [2]	Current Retail Void (s.f.)	Additional Demand from Household Growth (s.f.) (22-yr)	Total Demand 2035
Convenience Goods								
Grocery Stores	5.50%	$19,870,262	$9,613,571	$10,256,691	$450	22,793	7,604	30,396
Specialty Food Stores	0.30%	$1,075,811	$578,638	$497,173	$350	1,420	529	1,950
Beer, Wine, and Liquor Stores	0.42%	$1,503,268	$4,084,463	-$2,581,195	$300	--	863	--
Health & Personal Care Stores	1.96%	$7,072,874	$3,375,045	$3,697,829	$350	10,565	3,480	14,045
Shopper's Goods								
General Merchandise Stores	5.53%	$19,978,872	$5,727,434	$14,251,438	$500	28,503	6,881	35,384
Furniture & Home Furnishings Stores	1.02%	$3,679,110	$735,036	$2,944,074	$250	11,776	2,534	14,311
Clothing and Clothing Accessories	2.13%	$7,679,414	$2,781,159	$4,898,255	$250	19,593	5,290	24,883
Sport. Goods, Hobby, Book, & Music	0.92%	$3,333,981	$1,324,352	$2,009,629	$250	8,039	2,296	10,335
Miscellaneous Store Retailers	1.14%	$4,117,314	$3,486,893	$630,421	$250	2,522	2,836	5,358
Food Services & Drinking Places								
Full-Service Restaurants	2.13%	$7,691,247	$4,309,595	$3,381,652	$350	9,662	3,784	13,446
Limited-Service Eating Places	1.86%	$6,713,916	$1,541,576	$5,172,340	$325	15,915	3,557	19,472
Special Food Services	0.36%	$1,289,823	$1,266	$1,288,557	$250	5,154	888	6,043
Drinking Places (Alcoholic Bevs.)	0.22%	$786,411	$1,156,314	-$369,903	$250	--	542	--
Durable Goods								
Auto Parts, Accessories, and Tires	0.68%	$2,472,788	$352,252	$2,120,536	$250	8,482	1,703	10,185
Bldg Mater., Garden Equip. & Supply	4.42%	$15,954,058	$11,483,217	$4,470,841	$300	14,903	9,158	24,061
Electronics & Appliance Stores	0.98%	$3,529,721	$492,881	$3,036,840	$250	12,147	2,431	14,579
Total (without Groceries)	**24.05%**	**$86,878,606**	**$41,430,121**	**$45,448,485**		**148,681**		**194,050**

Source: Claritas, Census of Retail Trade for CO, ULI, ArLand

[1] Demand percentages based on national and state averages

[2] National averages per Urban Land Institute, research and retailer interviews

Table 22
Unmet Retail Demand by 2035 (Non-Grocery)

	1-Mile Market Area (s.f.) 2013	1-Mile Market Area (s.f.) 2035
Convenience Goods		
Specialty Food Stores	1,420	1,950
Beer, Wine, and Liquor Stores	--	--
Health & Personal Care Stores	10,565	14,045
Shopper's Goods		
General Merchandise Stores	---	---
Furniture & Home Furnishings Stores	11,776	14,311
Clothing and Clothing Accessories	19,593	24,883
Sport. Goods, Hobby, Book, & Music	8,039	10,335
Miscellaneous Store Retailers	2,522	5,358
Food Services & Drinking Places		
Full-Service Restaurants	9,662	13,446
Limited-Service Eating Places	15,915	19,472
Special Food Services	5,154	6,043
Drinking Places (Alcoholic Bevs.)	--	--
Total	**84,646**	**194,488**

Source: Claritas, Census of Retail Trade for CO, ULI, ArLand

The analysis shows demand for 85,000 to 195,000 square feet in retail categories appropriate for the North Broadway area. This demand figure does not include grocery store demand.

Categories most appropriate would include:

- Specialty Food Stores
- Health and Personal Care
- Furniture and Home Furnishings
- Clothing and Accessories
- Sporting Goods, Hobby, Books and Music
- Miscellaneous Store Retailers
- Full-Service Restaurants
- Limited Service Eating Places

Without the addition of catalyst activities, public investment, or anchor tenants to help galvanize commercial activities, potential lease up would likely be slow and incremental.

4.8 Retail Demand with an Anchor

The 8.5 acre Armory site is relatively small for a conventional grocery store anchored center; however, it is among a handful of North Broadway sites that have the potential to generate interest among retailers for a grocery store co-location. Grocery stores in conventional centers typically have square footage requirements, and developers of these centers typically add additional retail and commercial services within these centers to help with financial feasibility. Smaller, more urban grocery stores also have square footage requirements and developers of these centers will often add additional retail and commercial uses because there is strong interest among many retailers in co-location with a grocery store. For example, the planned urban grocery store at 20th and Chestnut in the

LoDo neighborhood of downtown Denver has an estimated 10,000 to 20,000 square feet of additional retail and office.

Banks, restaurants, dry cleaners, and other personal and business services like to be located next to grocery stores. Grocery stores may bring in a householder 2 to 3 times per week, at which time the householder is taking care of other business during the same shopping trip. A grocery store on the east side of Broadway would help support commercial activities on the Armory site and on the east side of the street, primarily.

4.9 Retail Market Analysis Conclusions

While there is grocery demand, there are trade-offs and questions regarding the feasibility of a grocery store in the neighborhood.

- Grocery stores prefer to be located in areas where there are households completely surrounding them. North Broadway is at the edge of North Boulder and adjacent to a significant amount of open space. This situation will not change.
- There is concern about the limited number of households in the North Broadway area. Additional households would make retailers more comfortable about a potential North Broadway location.
- There is ongoing concern about cannibalization of the existing and popular Lucky's market. It is located about one-mile from the Broadway and Yarmouth intersection. Depending on the market niche of a new grocery store, the impact analysis and conversations estimate that the impact would be in the range of 20 to 25% of overall store revenues at Lucky's. Given the thin margins under which grocery stores operate, Lucky's could find it difficult to survive under such conditions.
- Lucky's is currently not interested in a Lucky's annex or a smaller store in the North Broadway area at this time.
- Locally-based retailers, in particular, are anxiously awaiting the effect of the Walmart and Trader Joe's openings.
- Other alternatives include a smaller convenience store, offering limited fresh produce, a food co-op, and the like. There are two very limited stores in the neighborhood, which may potentially be a base for expanding neighborhood offerings.
- Grocery store development on the Armory site could propel demand for commercial development adjacent to or in easy proximity to the grocery store. However, the North Boulder Subcommunity Plan and current zoning on the Armory site are not conducive to construction of a conventional grocery store.
- Commercial development likes corners for easy accessibility. Lee Hill and Broadway is the closest intersection to the Armory, and there is development already slated for, or currently existing on these corners. However, without additional activities supporting redevelopment west of Broadway, it is unclear whether Armory redevelopment would be enough to help propel or bolster commercial redevelopment, mid-block or further south on the west side of Broadway.
- There is demand for an additional 85,000 to 195,000 square feet in retail categories appropriate for the North Broadway area, including specialty retail, restaurants, and the like. In order to facilitate lease-up, there would be the need to add catalyst activities or anchor tenants to the area such as art galleries (in conjunction with local artists), destination restaurants, entertainment offerings, brewpubs, musical venues, etc.

V. OFFICE AND LIGHT INDUSTRIAL ANALYSIS

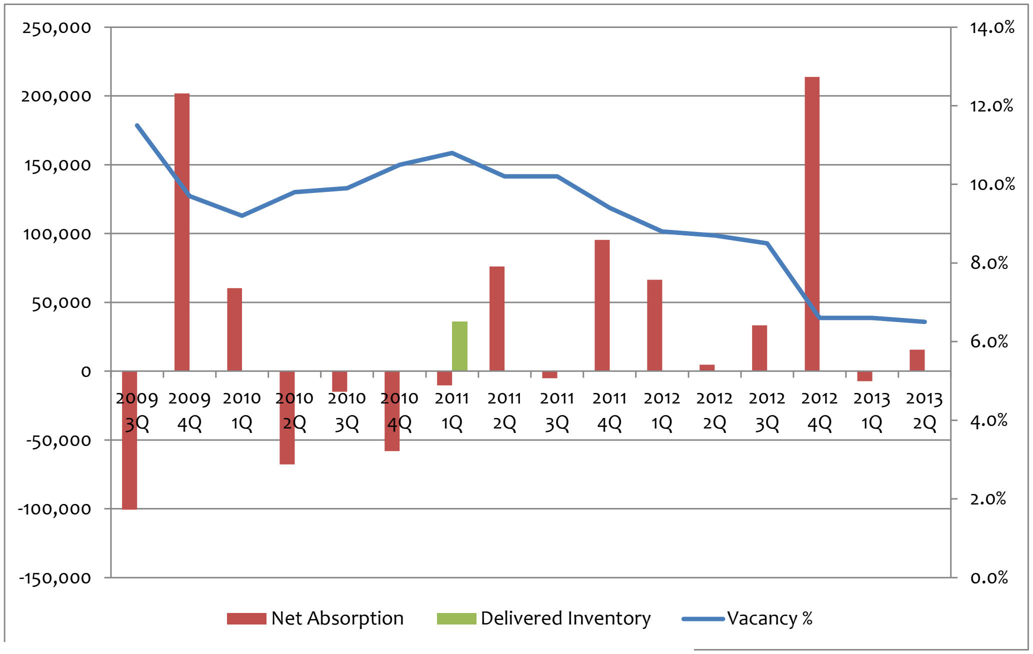
This section examines the office and industrial market in the North Broadway area. There is over 500,000 square feet of non-residential space between Violet and US 36 along Broadway. Of the commercial uses at the Holiday development and Uptown Broadway neighborhoods, small office space has been the most successfully developed. Office helps promote day time activity in residential neighborhoods, and, in the case of Boulder, helps accommodate personal and business services, and other creative industries. There is a significant amount of industrial, warehouse, and storage space west of Broadway. Several of the industrial areas offer smaller, inexpensive space for artists and other craftspeople.

5.1 Office Development Trends

Downtown Boulder, which is a creative office hub for the region, is experiencing very low vacancy rates, resulting in high gross rental rates of $30 to $35 per square foot (plus parking), pushing some companies to examine other more inexpensive areas in Boulder. While there are lower lease rates on the US 36 corridor and in Longmont, many companies would prefer to remain in the City as they grow.

As of the second quarter of 2013, the Boulder office vacancy rate at an estimated 6.5% is substantially lower than the 16.5% vacancy rate in the metropolitan Denver region, as a whole. There is about 11 million square feet of office space in Boulder. Recent vacancy rates have declined and there has been recent positive absorption in the market. Office development activity has picked up recently in preparation for an improving economy (Figure 15). There are several projects currently in the planning stage including a potential 70,000 square foot mixed use redevelopment project, including office at 30th and Pearl, and a 45,000 square foot office-flex property at 3200-28th Street.

Figure 15
Boulder Office Development Trends



Source: CoStar

Both the Holiday neighborhood and Uptown Broadway include office space. Studio Mews near Zamia Street within the Holiday neighborhood was intended to be an energizing mix of unique buildings and uses with residences above artists' studios and shops. The studios and shops have been converted to primarily office uses, although many of the businesses are in the creative realm. Dakota Ridge west of the Broadway corridor also has some office space.

5.2 Office Development Potential

The market for office is a function of growth or change in jobs among those industry sectors that typically occupy office space. Table 23 describes the current jobs in the Regional Market Area, which is the market area examined for office space potential. Approximately 250 jobs are forecast for this area.

After calculating the number of potential new jobs during this time period, an estimate was made of the portion of the workforce in industry categories and their requirements for office space. While categories such as Construction and Wholesale Trade may occupy very little traditional office space, industries such as Professional and Technical Services, for example, have an estimated high percentage of their work force in office space. Future jobs growth in the area indicates demand of approximately 25,000 to 30,000 square feet of office space, much of which would be in a small office configuration, similar to what has been developed in the area. Interviews also indicate that increasing demand for small office space has been seen as the economy returns. Studio Mews, which was originally intended to be artists' studios in the Holiday neighborhood, does include a few artists, however, many of the users are more office-oriented.

Table 23
Potential Office Space Demand, 2010-2035

Industry	Estimated Regional Jobs 2013	% Jobs	% of Total Jobs Estimated to be Office	New Regional Market Area Jobs 2013-2035	Office Jobs	Market Area Office Space S.F. Needs[1]
Agriculture, Forestry, Fishing and Hunting	73	0.5%	10%	1	0	32
Mining	40	0.3%	60%	1	0	105
Utilities	33	0.2%	15%	1	0	22
Construction	669	4.7%	5%	12	1	146
Manufacturing	773	5.5%	10%	14	1	338
Wholesale Trade	636	4.5%	10%	11	1	278
Retail Trade	1,424	10.1%	10%	25	2	622
Transportation and Warehousing	58	0.4%	10%	1	0	25
Information	150	1.1%	70%	3	2	459
Finance and Insurance	667	4.7%	95%	12	11	2,768
Real Estate and Rental and Leasing	559	4.0%	95%	10	9	2,319
Professional and Technical Services	1,433	10.1%	95%	25	24	5,946
Management of Companies and Enterprise:	44	0.3%	95%	1	1	183
Administrative and Waste Services	413	2.9%	15%	7	1	271
Educational Services	855	6.0%	25%	15	4	934
Health Care and Social Assistance	2,578	18.2%	65%	45	29	7,319
Arts, Entertainment, and Recreation	415	2.9%	15%	7	1	272
Accommodation and Food Services	961	6.8%	15%	17	3	630
Other Services, Ex. Public Admin	1,058	7.5%	15%	18	3	693
Public Administration	1,299	9.2%	60%	23	14	3,404
Total	**14,138**	100.0%	43%	**247**	**107**	**26,763**

Source: Claritaas, DRCOG, ArLand
[1] CoStar estimates 250 square foot per office job

5.3 Current Industrial Uses

Boulder has long been a jobs hub for the region, although there is mounting concern about the lack of quality industrial and warehouse space to accommodate growing and innovative businesses. According to interviews and the Xceligent database, lease rates for the industrial space west of Broadway are $14-$17 per square foot on a modified gross or gross basis for spaces fronting Broadway and $9-$12 per square foot towards the back of the properties. Some of the industrial space, particularly at 4593 and 4949 Broadway, are properties conducive to dividing up into 400-500 square foot spaces, attractive to artists and others in creative, start-up industries. The artists' spaces are primarily rentals.

There are older auto-related uses interspersed among the industrial and retail uses west of Broadway. There are a number of properties used primarily for storage. There are infrastructure and maintenance issues throughout the properties. Access, parking, setbacks, etc. are inconsistent throughout the west side of the street. According to interviews, the heavier industrial uses have slowly moved out. While there have historically been more auto-oriented uses, those uses are not as lucrative anymore and have been replaced by storage, which is. Namaste Solar, the solar panel developer and installer, has their headquarters in the area.

5.4 Industrial Demand

While there is demand for industrial and light industrial flex uses in the Boulder market and the North Broadway area, further significant development of this use is precluded by the mixed use development that has already occurred in the area, and the lack of available space to adequately accommodate Boulder businesses that have outgrown their 'start-up' space. Although there are more technical definitions, in general, industrial space refers to traditional industrial space with manufacturing or other uses which either need a lot of space or are generally not as desirable in a mixed use environment. Light industrial flex space is intentionally flexible where some of the space can be used for office and other space can be used for light manufacturing and warehousing. This type of space can be popular among startups because of its relatively low cost.

The market for industrial space is a function of growth or change in jobs among those industry sectors that typically occupy industrial space. Table 24 describes the current jobs in the Regional Market Area and the share that are estimated to be industrial jobs.

After calculating the number of potential new jobs forecast to be created by 2035, an estimate was made of the portion of the workforce in industry categories with requirements for light industrial flex space. While there is estimated demand for up to 30,000 square feet in the North Broadway area, it is not anticipated that traditional industrial space for significant processing or manufacturing is appropriate in the North Broadway area. Flexible commercial space appropriate for startups, businesses like Namaste Solar, light research and development, artist's space and potentially some quasi-retail space, would be targeted light industrial users.

The 1995 North Boulder Subcommunity Plan highlights the importance of the industrial uses to the area acknowledging that additional commercial and industrial space provides opportunities for people to work close to where they live. It also acknowledges the importance of upgrading the Broadway corridor, at the same time, stating that light industrial businesses are extremely valuable and should not be displaced. Rents are relatively low compared to the rest of the City, and the current uses generate relatively fewer vehicle trips per square foot of building area. The 1995 Plan also suggests the design of buildings which are structurally flexible to accommodate a mix of uses over their expected lives.

Table 24
Potential Light Industrial Flex Demand

Industry	Estimated Regional Jobs 2013	% Jobs	% of Total Jobs Estimated to be in Industrial Space	New Regional Market Area Jobs 2012-2035	Industrial Jobs	Market Area Industrial Space S. F. Needs[1]
Agriculture, Forestry, Fishing and Hunting	73	0.5%	60%	1	1	306
Mining	40	0.3%	25%	1	0	70
Utilities	33	0.2%	85%	1	0	196
Construction	669	4.7%	50%	12	6	2,630
Manufacturing	773	5.5%	90%	14	12	4,862
Wholesale Trade	636	4.5%	90%	11	10	12,000
Retail Trade	1,424	10.1%	10%	25	2	995
Transportation and Warehousing	58	0.4%	80%	1	1	973
Information	150	1.1%	30%	3	1	629
Finance and Insurance	667	4.7%	5%	12	1	350
Real Estate and Rental and Leasing	559	4.0%	5%	10	0	244
Professional and Technical Services	1,433	10.1%	5%	25	1	626
Management of Companies and Enterprise:	44	0.3%	5%	1	0	17
Administrative and Waste Services	413	2.9%	40%	7	3	1,299
Educational Services	855	6.0%	5%	15	1	336
Health Care and Social Assistance	2,578	18.2%	5%	45	2	1,013
Arts, Entertainment, and Recreation	415	2.9%	3%	7	0	98
Accommodation and Food Services	961	6.8%	3%	17	1	227
Other Services, Ex. Public Admin	1,058	7.5%	20%	18	4	1,664
Public Administration	1,299	9.2%	20%	23	5	2,042
Total	**14,138**	**100.0%**	21%	**247**	**51**	**30,576**

Source: DRCOG, CoStar, Claritas, ArLand

[1] Square foot per job estimates vary from 450 to 1,200 sf depending on industry

5.5 Artists

The NoBo Art District is an artist-run organization dedicated to promoting the artists and creative industries in the North Boulder area. The District has a significant and growing presence in the North Boulder community. The district is not an officially designated arts district at this time, but is pursuing that designation through City and State channels. According to the district, there are over 225 artists and others in the creative industries clustered along Broadway and the North Boulder area. On the west side of Broadway, there is a particularly strong clustering of artists at 4949 Broadway and 4593 Broadway.

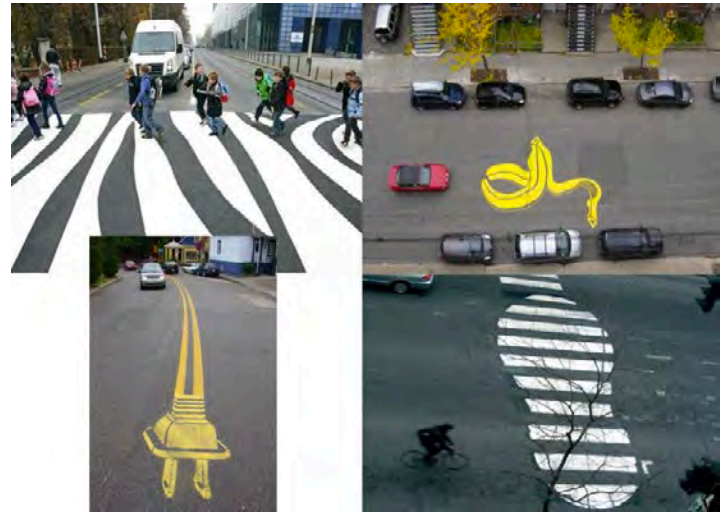
Figure 16
North Broadway Artists and Creatives

Source: NoBo Art District

The district’s initiatives include:

- Sponsoring First Friday openings and other events to support local artists;
- Offering PaintAbout classes and scholarships to support access to contemporary art and education;
- Hosting art projects and other community events like the NoBo Little Libraries at various venues within the neighborhood; and,
- Initiating the creation of a vital street-scape enlivened by sculpture, lighting and other art through the creation of a public arts program.

Source: NoBo Art District



The group is interested in getting more involved in the “branding” of North Broadway through sculpture, lighting, painting of the street, and other activities which would not only help their respective businesses, but would also help brand and distinguish the area from the wide variety of other commercial districts in Boulder. A further description of potential artists’ involvement is discussed in the Opportunities section.

5.6 Potential Office and Industrial Demand Capture

Through 2035, the analysis forecasts demand for approximately 20,000 to 25,000 square feet of office and 30,000 to 35,000 square feet of light industrial / flex space. However, demand capture is going to be dependent on overcoming some of the barriers to redevelopment historically seen in the area and taking advantage of potential area opportunities. This will be discussed in the next sections on Barriers and Next Steps.

VI. North Broadway Barriers

The potential demand for commercial uses in the North Broadway area is described below, taking into consideration local and regional market trends, feedback from area real estate experts, developers, brokers and property owners. Competitive development projects and trends over the past ten years were examined. As with any plan and ultimate development project, the actual mix and timing of development is going to vary based upon a variety of factors, including the needs of the property owners, the development and financial markets, the timing and cost of public sector improvements and assistance, if any, and level of private sector investment.

6.1 Village Center

One of the primary challenges to the development of a Village Center in the North Broadway area is the perception in the community and in the market that it took a significant amount of time for the existing commercial to absorb. At the same time, there isn't as much retail space to activate the area as is desirable.

- The North Broadway area is on the edge of the City, so it is not an area that many Boulder residents will traverse as they are commuting or running other errands, although some residents of outlying communities do commute through the area. While there are some bicycling shops that are a destination for those in the bicycling community, there aren't other significant clusters of destination retailers or an anchor tenant like a supermarket. Although restaurants like 4580 and Proto's have been successful in attracting people throughout the City, other destinations in the area are few and far between.
- There has been a discussion of a grocery anchored retail shopping center to help activate the retail spaces in the North Broadway area. North Boulder community members have expressed some interest in a grocery store, but over time they have become somewhat split on the level of support for the concept of a new store. While a grocery store with a conventional layout could serve as an anchor tenant for the area, its locational benefit would generally accrue to other retail establishments and intersections closest to the center first.
- While there appears to be market demand for a smaller convenience or grocery store, there has been a longstanding concern on the part of the grocers that there aren't enough households to support another independent local market primarily serving the local neighborhood. Lucky's is very close and it is estimated that another grocery store in the area similar to Lucky's would negatively impact the store.
- Smaller grocery stores tend to carry higher priced merchandise and, although helpful for convenience items, would not be attractive for significant shopping among those with more modest incomes in the neighborhood. The introduction of the Walmart neighborhood grocery store to the Diagonal Plaza area detracts from the ability of a North Broadway grocery store to serve the local neighborhood.
- The width of Broadway, lack of pedestrian crossings, and the traffic volume are also barriers to retail synergy at the Yarmouth and Broadway intersection that includes the Village Center. Property owners on the west side of Broadway have observed that patrons

of restaurants on the east side of Broadway will often park on their properties and then have to cross Broadway to get to their destinations.

6.2 Public Storage

One of the more significant challenges to the redevelopment of the West Broadway area is the number of self-storage units in the area. This particular use has been successful in the area and the growth of smaller residential units and commercial space in the immediate area has contributed to the demand. It can provide significant cash flow to property owners and can be a difficult land use to transition from because it can be financially lucrative.

Conservatively, self-storage facilities generate an estimated $8 per square foot (NNN) basis[6]. Gross revenues average over $1 per square foot based on posted price lists for storage facilities in the area. Assuming a capitalization rate of 7.75%, this translates to $103 per square foot for the building as well as the land on which the building is located. Any redeveloper would need to pay this price in order to acquire land in this area, in addition to paying for other needed public improvements. While prices fluctuate depending on Broadway frontage, prices appear to be in line with recent sales. The Namaste Solar building and land's value is estimated at $115 to $125 per square foot, per Boulder County assessor's records.

6.3 Flood Plain

Another difficult issue is the need for significant flood mitigation prior to redevelopment near Yarmouth and Broadway, west of Broadway. The estimated costs in the area west of Broadway, encompassing the commercial area fronting Broadway, are about $2.7 million. There is also an additional approximately $3.1 million in estimated building flood mitigation costs. The September 2013 floods have triggered the need to reevaluate the flood plain maps in the area. These estimates may change.

While there may be funds available through the Federal Emergency Management Agency (FEMA) for flood recovery cost reimbursement, it is unlikely that FEMA would reimburse the City for floodplain related redevelopment costs. Redevelopment in the flood plain would need to occur in a manner consistent with FEMA, State, and City of Boulder floodplain development regulations.

6.4 Annexation

Some of the properties west of Broadway in the Village Center area have not been annexed into the City. These properties are all County enclaves. The North Boulder Subcommunity Plan particularly encourages annexation of these County enclaves for a variety of reasons including provision of urban services, given that the properties are already developed at urban densities. Proposed annexations with additional development potential need to demonstrate community benefit consistent with Boulder Valley Comprehensive Plan (BVCP)

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[6] NNN is a triple net lease where, in addition to the stipulated rent, the lessee assumes payment of all expenses associated with the operation of the property including taxes, insurance and other operating expenses, including costs of maintenance and repair.

policies. Annexations that are most strongly encouraged are those that resolve an issue of public health without creating additional development impacts.

VII. North Boulder Subcommunity Plan Update Opportunities

Despite the barriers described throughout this study, there are significant opportunities in the North Broadway market area. The community is interested in ensuring that the intent of the existing plan for the area is carried out, with some modifications to address changing circumstances and existing conditions.

While there has been a longstanding desire for a grocery-anchored center to not only help define and to assist with the commercial activities in the community, other action items could bolster the existing retail and address some of the redevelopment barriers in the area.

Table 25
North Boulder Subcommunity Plan Update Opportunities

	Existing Condition	Opportunity
Village Center	The Village Center is focused on the intersection of Broadway and Yarmouth, some of which overlaps with the high hazard flood zone.	The Village Center geographic area should be re-evaluated to align future land use options with the area's market realities and post-flood assessment and conditions.
Grocery Anchor	Retailers and others are waiting to see how the grocery situation pans out in Boulder. This analysis was conducted as the Walmart Neighborhood grocery recently opened to large crowds. Trader Joe's has yet to open as of the date of this report. While the new retailers will generate a surge in interest in the short term, and while sales and traffic will return to previous levels, there will be some impact on stores and/or merchandise directly competitive with the new offerings.	Grocery stores need rooftops and there is ongoing concern with local service providers about the general lack of rooftops in the North Broadway area. Any number of additional rooftops would help support a convenience type of market. Several North Boulder community members have expressed interest in a convenience oriented grocery in the market area. Working with the existing stores to expand their offerings (there are two very limited stores offering some fresh foods in the North Broadway area), partnering with a food co-op, farmers market, or other alternative form of supplying fresh groceries to the neighborhood would help address demand and have a much more limited impact on other area grocers.

	Existing Condition	Opportunity
NoBo Art District	There are an estimated 225 artists and others in creative industries in the North Broadway area with a strong interest in creating / supporting a brand for the area that reflects their presence and helps bolster their creative activities. This group has indicated a strong interest in being involved in the development of public improvements and related activities. There is also inexpensive industrial space in the North Broadway area, some of which hasn't been well-maintained. Some of the spaces are work spaces for artists. They are sized small enough to be inexpensive rentals.	Incorporate artists into the public process. Evaluate potential for a plan for funding that incorporates art into public spaces and improvements. The NoBo Art District can potentially sponsor competitions for branding ideas and other public improvements with City assistance and other support. While artists are located throughout the area, they tend to be clustered in the more inexpensive industrial spaces on Broadway. Most of the artists do not own their spaces. Work with developers to ensure that inexpensive live / work and other flex space is available to help support the arts community in the North Broadway area.
Other Anchor Tenants / Users	Need for additional "anchors" to support / bolster commercial activities in the area	Branding activities, commercial space to support the brand, working with local brokers and developers to identify additional anchors such as art galleries (in conjunction with local artists), destination restaurants, entertainment offerings, brewpubs, musical venues, and the like. Identify local retailers, based on the categories identified, in other parts of the City or region, with a potential interest in expanding. Continue to support small office space users.

	Existing Condition	Opportunity
Street Improvements	Although Broadway can be busy, it is not a major arterial. However, it can be wide and intimidating to cross. Yarmouth doesn't go through on the west side of Broadway yet. There is some willingness among area property owners for a Yarmouth extension across Broadway to the west.	Evaluate opportunities to create an intersection at Yarmouth and Broadway (or at the center of the geographically defined Village Center, if refined) to enhance the Village Center concept in the 1995 North Boulder Subcommunity Plan. Study the need for a pedestrian signal or other alternatives to ensure that pedestrians can traverse Broadway safely at Yarmouth, or other key intersections that may advance the Village Center concept. Work with the property owner on the west side of Broadway at Yarmouth to ensure that a Yarmouth extension would complement potential future redevelopment plans.
Public Storage And Other Potential Redevelopment Sites	Public storage sites are scattered throughout the area west of Broadway and there are a variety of other underutilized sites in the area west of Broadway including auto service centers, etc.	The economics of public storage are difficult to address. In the short term, there are locations in front of some of the storage and/or industrial facilities that could facilitate some redevelopment. During the North Boulder Subcommunity Plan update and with the help of developers currently located in the neighborhood, reach out to property owners on the west side of Broadway regarding their redevelopment interests and potentials.

	Existing Condition	Opportunity
Flood Plain Mitigation	There is an estimated over $5 million needed for flood plain mitigation on properties on the west side of Broadway near Four Mile Canyon Creek. While funds may be available from FEMA for flood recovery cost reimbursement, funds for floodplain redevelopment are not available. The funds available may not cover all of the projected needs. At this time, any redevelopment activity would generate the need to address the flood plain improvements with the first redevelopment responsible for paying all the costs. Because of the multiple property owners in the area, this presents a significant barrier towards redevelopment.	Funding for flood plain improvements has been addressed in other jurisdictions through larger regional districts which receive public and private funds to address flood plain improvements needed, however, these funds are typically prioritized to mitigate flood hazards to existing development. In order to help incentivize redevelopment in the area, potential flood mitigation tools might include: • The use of special districts, such as urban renewal, or more targeted districts, to address and fund flood plain mitigation improvements needed up front to be repaid through redevelopment tax increment over time. Redevelopment activity would be needed in order to generate the tax increment necessary to pay back the improvements made. • Redevelopment, as a City financial tool, could be focused on public improvements. Explore its use in the area west of Broadway to help facilitate flood plain improvements, and address other infrastructure needs.
Annexation	On the west side of Broadway, there are a variety of properties within County enclaves. For redevelopment to occur, the properties must annex into the City with the inclusion of substantial community benefit. For some of the smaller property owners, this has presented a challenge for redevelopment.	Annexation is a complex, Citywide policy issue. Explore opportunities for flexibility with annexations that would align with overall project goals and desired outcomes for the area.

	Existing Condition	Opportunity
Armory	Developers have entered into an agreement with the Colorado Department of Military and Veterans Affairs (DMVA) to explore the purchase and redevelopment of the Army National Guard Armory. Various site plans and options have been discussed with the community over a number of years. North Boulder community members have expressed some interest in a grocery store, but over time, they have been somewhat split on the level of support for the concept of a new store.	Without additional improvements to the intersection of Yarmouth and Broadway, including improvements that would make Yarmouth a true intersection, it is unlikely that commercial redevelopment at the Armory would benefit the Village Center area. At the same time, allowing limited retail development at the Armory should not negatively impact the market potential for commercial development at the Village Center area since its challenges, in some respects, are unrelated. At this point in time, without a significant number of additional households in the North Broadway area, the addition of a neighborhood or full-service grocery store would potentially impact the viability of other grocery stores including Lucky's, which is less than one mile from Broadway and Yarmouth. With or without the grocery anchor, there has also been an ongoing desire for neighborhood commercial services. While there is a market, their potential viability would be strengthened, in general, with an increased number of households in the North Broadway area.

APPENDIX 2: 2013-2014 COMMUNITY INPUT SUMMARY

This appendix summarizes community input on the North Boulder Subcommunity Plan from small group discussions, two public meetings in October 2013 and April 2014, and an open house in September 2014. The table below organizes community input into key themes and how the Action Plan or parallel city initiatives are addressing it.

	Key Themes from Community Input	Action Plan Items (if applicable)	Notes
General Comments	**1995 Plan's Vision is Still Valid** The 1995 Plan's overarching vision for the North Broadway area is still valid, including: • Strengthening established areas; • Redevelopment with a focus on walkable, connected, and mixed use places; • A diversity of housing choices; • New community and civic attractions; • Improved design quality; • An integrated network of parks and open space; and • Preservation and enhancement of sensitive environmental areas	All	The plan update focuses on a new generation of action items that further advances the 1995 Plan's vision.
	Action Oriented Approach Support for an action oriented approach that further implements the 1995 Plan's vision.		
	Geographic Focus Support for the targeted geographic focus on the North Broadway area as this is the area with the most potential for change.	All	The plan update focuses on the North Broadway area (see Figure 1: Study Area).
	Keep North Broadway Eclectic Concerns about North Broadway losing its "funkiness" and eclectic atmosphere as redevelopment occurs.	All	The Action Plan has arts and placemaking strategies throughout. Additionally, the Action Plan recommends protections for service industrial and arts oriented land uses, which have contributed towards the area's eclectic appeal.
	North Broadway as Human Scale Place Support for North Broadway as a pedestrian friendly, human-scaled main street, as presented in the 1995 plan.	Transportation, Access, and Parking Action Items (2.1-2.8)	The Action Plan recommends streetscape improvements and pedestrian and bicycle enhancements. Additionally, the 1995 Plan's vision and policies support this concept.
Arts and Placemaking Comments	**Strong Support for NoBo Arts District**	1.1-2.2, 2.5, 3.1-3.3	The Action Plan contains numerous recommendations to support the growing arts scene in North Boulder. The city's Library and Arts Department is also launching two key related initiatives – the Community Cultural Plan and Creative Districting project in 2014 that will evaluate opportunities for the city to support formation of local creative districts like NoBo. The city is also supporting formation of NoBo Arts District including meeting facilitation, utilizing a consultant to support the district, and other forthcoming support.
	US 36 and Broadway Gateway Continued support for community process to design a new vision for this area.	1.7	The 1995 Plan's vision for the US 36 and Broadway gateway reflects a "focus on landform and landscape design rather than on any architectural treatment or statement." The Action Plan process indicated support for a new type of gateway that includes placemaking and integration with a mobility hub.

	Key Themes from Community Input	Action Plan Items (if applicable)	Notes
			CDOT has expressed interest in maintenance facilities in the gateway area. City staff is currently working with CDOT to evaluate other locations for maintenance facilities that would meet their needs and the city's wishes for the gateway area.
	Losing Affordable Artists and Service Industrial is a Key Concern The community is concerned that as redevelopment continues to occur along North Broadway, the affordable spaces that have accommodated artists, creative industries, and service industrial businesses will disappear.	3.1	The Action Plan recommends strategies to further this priority throughout. The city's Library and Arts Department is also launching the Community Cultural Plan that will evaluate opportunities to advance these strategies. The 1995 Plan also supports "methods to strengthen service industrial areas" that yielded related zoning code changes in the late 1990s to implement the plan that are still in effect.
	Arts Anchor Land Use An arts anchor land use would bolster the economic vitality of the area and foster the growing North Broadway arts community.	1.6	The North Broadway Market Study (see Appendix A) also supports this strategy, and the Action Plan addresses this. The Community Cultural Plan will also evaluate opportunities to advance this strategy.
	Arts-Oriented Placemaking Along North Broadway Support for arts oriented placemaking along North Broadway as an opportunity for branding, to unify the area, and support the growing North Boulder arts scene. This could include streetscape improvements and art integrated into infrastructure (e.g., artistic crosswalks).	1.2-2.2; 2.5, 3.3	The Action Plan recommends these strategies throughout, including the potential for a more comprehensive strategy with a North Broadway Streetscape Plan.
	Creative Signage The city's sign code may be too rigid and should support creative signage to foster the growing North Boulder arts scene and placemaking opportunities. This includes business and arts district identification signs and directional signs to the businesses less visible off of Broadway.	1.2	The Action Plan contains specific recommendations addressing this.
	Live/Work Support for more allowances for live/work units, particularly for artists.	1.1	The Action Plan contains specific recommendations addressing this.
	North Broadway Streetscape Plan Support for a comprehensive evaluation and strategies to achieve a variety of goals for North Broadway around arts, placemaking, walkability/bikeability, and access management.	2.5	The Action Plan contains specific recommendations addressing this.
Transportation, Access, and Parking	**Transportation Connectivity** The 1995 Plan's vision for connectivity has not been fully realized—there are several missing multi-modal connections.	Transportation, Access, and Parking Action Items (2.1-2.6)	The 1995 Plan's connections plan is still being implemented as redevelopment occurs. Specific new or enhanced transportation connections are discussed below.
	Specific Transportation Connections		
	East-West Pedestrian Connectivity Broadway is a major barrier to cross with the existing limited pedestrian crosswalks.	2.1	The Action Plan recommends evaluating new or enhanced crossings at the Broadway and Yellow Pine, Yarmouth, Violet, and Lee Hill Road intersections and as improved lighting and safety measures at the Fourmile Canyon Creek path Broadway underpass.
	North-South Bicycle Connectivity Bicycling along or near Broadway north-south is challenging and needs improvement because of traffic speeds and lack infrastructure to make it easy and safe.	2.2	The Action Plan recommends related enhancements and the city's GO Boulder staff is evaluating separated or buffered bicycle facilities along North Broadway that has been included in the 2014 Transportation Master Plan. The Violet Crossing development at the northeast corner of Violet and Broadway has also facilitated a connection across Fourmile Canyon Creek.
	Boulder Meadows Bicycle/Pedestrian Connection The community supports a direct bicycle and pedestrian connection from this mobile home park west to the Uptown mixed use development. No connection currently exists without going north to Yarmouth.	2.1	The 1995 Plan (connections plan) shows two proposed connections west to the Uptown mixed use area. The Action Plan further recommends implementing this connection.

	Key Themes from Community Input	Action Plan Items (if applicable)	Notes
	Signalized Intersection at Broadway and Yarmouth Support for a new signalized intersection at this location.	2.1, 2.5	The 1995 Plan calls for a stoplight at this intersection that redevelopment on the west side of Broadway at Yarmouth will facilitate. The Action Plan further emphasizes facilitating this connection.
	Placemaking and Transportation Infrastructure Support for placemaking with infrastructure – e.g., artistic crosswalks.	2.1-2.2	The Action recommends art integrated with transportation infrastructure.
	North Broadway B-Cycle The community supports an additional B-Cycle station(s) in the North Broadway area to link in with the growing citywide network of stations.	2.2	The Action Plan contains specific recommendations addressing this.
	Broadway Traffic Calming The community agrees North Broadway is wide an intimidating to cross, in part because of high speed traffic.	1.7, 2.1-2.2, 2.5	The Action Plan contains a recommendation for a North Broadway Streetscape Plan that should include traffic calming measures.
	North Broadway Streetscape Plan Strong support for a comprehensive evaluation and strategies with a streetscape plan to achieve a combination of goals around walkability, placemaking, etc.	2.5	The Action Plan contains specific recommendations addressing this.
	Inadequate Parking The community indicated that there may be inadequate parking for businesses in the redeveloped areas along North Broadway (e.g., Main Street North, Uptown). While there is support for minimizing parking lots from an urban design standpoint, these businesses depend on patrons arriving by car.	2.6	The Action Plan contains specific recommendations addressing this, first starting with a parking utilization analysis to better understand the problem before identifying potential solutions.
	Enhanced Transit The community supports extending the SKIP terminus north away from the current location at the homeless shelter. The current terminus feels unsafe and does not integrate well into the neighborhood. The community also supports evaluating a new transit route along US 36 east connecting the North Broadway area to the commercial areas along 28th Street and Boulder Junction.	2.3-2.4	The Action Plan and Transportation Master Plan contain specific recommendations addressing this.
Land Use and Development	**Affordable and Special Needs Housing**		
	The community supports the diversity of housing choices that has emerged since 1995, but there may now be an overconcentration of affordable and/or special needs housing in the North Boulder Subcommunity.		The citywide Comprehensive Housing Strategy (CHS) will develop a new generation of housing strategies and related implementation tools. The city's Housing Division has been actively involved with the North Boulder Subcommunity Plan and these comments have been communicated to them to consider with the CHS project.
	Community members support the mission of special needs housing but have stated there is an overconcentration in North Boulder.		
	Higher Density Housing Mixed opinions on whether or not higher density housing along Broadway between Violet and Sumac is desirable.		The Boulder Valley Comprehensive Plan and Comprehensive Housing Strategy (which includes an opportunity site component) will further evaluate the feasibility of new housing.
	View Protection Mixed opinions on the west side of Broadway regarding avoiding the "canyon" effect with redevelopment and view protection to the west.		The city's zoning code has several mechanisms to support view protection. First, the citywide charter limiting any building to a maximum of 55 feet in height, and all zone districts abutting the west side of Broadway have floor area ratio (FAR) standards, setbacks, and open space requirements.
	Village Center Mixed opinions on the 1995 Plan's concept of keeping the retail and mixed use areas concentrated in one area along North Broadway, on both sides of the street, while others have stated that North Broadway should act more as a corridor.		The ongoing flood mitigation and mapping process will delay evaluation of the village center.
	Annexations Community support for providing more flexibility and fostering annexations of county enclaves in the study area.	3.2	Action Plan Item 3.2 directly addresses this item.

Key Themes from Community Input	Action Plan Items (if applicable)	Notes
Anchor Land Use The community (and the North Broadway Market Study) support the importance of an anchor land use to bolster the economic vitality of the area.	1.6	Action Plan Item 1.6 directly addresses this item. The current proposal for the Armory site's redevelopment includes several new tenants, one of which is a destination brew pub that may act as a future anchor.
Armory Site The Armory site is an important opportunity, but the community has mixed opinions on what is appropriate there. However, there is strong support for integrating the arts and placemaking into the site and an urban, walkable concept.	The Armory site developer has submitted plans to redevelop the site as a mixed use project with residential, retail, artists space, and a brew pub. To date, the concept has received strong community support. The proposal is slated for Planning Board and City Council hearings in 2014.	
Large Scale Retail The community continues to support neighborhood scale retail, rather than any "big box" type of retail, consistent with the community's vision with the 1995 Plan.	The current zoning along North Broadway restricts retail uses to a neighborhood scale. This zoning has been in place since the late 1990s as a 1995 Plan implementation item. The Business Main Street is intended to be the highest density area along North Broadway (part of the Village Center) and requires a use review for any retail over 20,000 square feet, and the MU-1 district that includes the Armory site and Main Street North only allows retail in a mixed use building, and no more than 5,000 square feet of retail.	
Affordable Service Industrial and Artists Space The community supports strategies to address protection and promotion of affordable artists, service industrial, and live-work space.	1.1, 3.1	Action Plan items 1.1 and 3.1 directly address this item.
Library Community support for a library, which was an implementation item from the 1995 Plan.	Since the Action Plan project has begun, the NoBo Corner Library has opened at Violet and Broadway.	
Need Outdoor Space for Events Community support for more outdoor gathering areas for events.	The Main Street North and Uptown developments have some outdoor public plaza areas, and the redevelopment plan submitted for the Armory includes substantial outdoor plaza areas.	
Public Safety Issues with Homeless Shelters The community expressed safety concerns, particularly as it relates to the transient population in the North Broadway area.	2.1	Action Plan Item 2.1 (Fourmile Canyon Creek underpass lighting) directly addresses this. City staff has also relayed these concerns to the existing homeless shelter and soon to be completed transitional housing at 1175 Lee Hill, and learned that both facilities have detailed codes of conduct that addresses behavior of their tenants outside of the shelter in the North Broadway area. The City's Police Department has also been involved with this project, having supported community meetings to listen and respond to these concerns.
General Improvement District Community support for exploring formation of a North Broadway improvement district to support numerous goals throughout this Action Plan.	3.3	Action Plan Item 3.3 directly addresses this.
Flood Mitigation Community support for financing Fourmile Canyon Creek flood mitigation improvements, in addition to already completed sediment removal and cleanup after the September 2013 floods.	The city has applied for Community Development Block Grant (Disaster Recovery) funding through the Colorado Resiliency Planning Grant Program for a "West Fourmile Canyon Creek Annexation Study and Design Charrette" that includes the Ponderosa Mobile Home park.	

GROWING UP BOULDER INPUT

A sample of child, youth and parent perspectives (2013-2014)

For the North Boulder Subcommunity Plan Update, Growing Up Boulder used a variety of methods to ask young people and their parents, "*What do you like or not like about North Broadway? What are the key opportunities for that area?"*

While the information collected is not part of a scientific study, we believe the views shared here still represent meaningful input into the Update, and they include an important subset of the community that is often not represented at public meetings or in more traditional forms of outreach.

Community Engagement methods employed include:

- Drawing sessions with elementary and middle school children and the public meeting on October 30, 2013 (n=3 elementary school children, n=1 middle school student)
- Questions for parents of young children via Boulder Rock'n Moms Yahoo Group post on November 7, 2013 (n=24)
- Questions for high school student acquaintances via email on November 7, 2013 (n=4)
- "City-on-a-wall" activity and individual drawings with Foothill Elementary School 1st grade class on May 5, 2014 (n=24)

Answers varied significantly by age group. Below is a summary of the most frequently requested design elements, in descending order of importance.

Group	**Ideas/Design elements**
Elementary School children	• Fields, trees and flowers • Zoo or space for animals • Toy store
Youth (middle school + high school)	• Increased safety at the Front Range/Broadway bus stop • Safer paths to walk and ride bikes in North Boulder
Parents	• Indoor play space • Water features (pool and/or splash pad) • Inexpensive restaurants • General store • Shade on playgrounds

The rest of this document provides the detailed information collected from children, youth and families.

Design elements	Elementary School	Middle School	High School	Parents of children
n=56	**27**	**1**	**4**	**24**
Businesses				
Ice cream/frozen yogurt	2		2	
Inexpensive restaurant			1	**6**
healthy drive through				1
"Fun" store like Apple Store			1	
Toy store	**5**		1	
Artisan shop			1	
museum	1			
mall	1			
general/small grocery store	2			**6**
Candy store	4		1	
Book store		1		
winding pedestrian shopping areas				5
Clothing store			1	
Recreation				
zoo and/or space for animals	**11**			
water features (pool and/or splash pad)	2		1	**8**
playground	2		1	
indoor play area	1	1	1	**14**
teen hangout				3
skate park				2
library--regular-sized				5
improve Holiday playground				5
outdoor community space				1
shade on playgrounds				**6**
interactive trail				1
movie theater			1	
fields, trees and flowers	**17**	1	1	2
Transportation			1	
Safer paths to walk and bike (Dakota Ridge to Broadway scary)	2		**3**	2
Ecopass			1	
Increased safety at Front Range/Broadway stop			**4**	3
More walkable destinations				3
Safety				
Increased safety in Dakota Ridge			2	2

Complete responses

During the October 2013 North Boulder Subcommunity Meeting, facilitators worked with several elementary school and middle school students to collect their ideas for the North Boulder Subcommunity Plan. The instructions were:

1. Draw a picture of North Broadway which answers these questions:
   a. (All ages) What do you see yourself doing in the main North Boulder downtown area? What would it look like, smell like, feel like? With whom would you be doing it? How would you get there? (Bus, bike, scooter, walk, car, roller skates, skateboard?)
   b. (First grade and older) Would the North Broadway area be a corridor (one straight line of stores down Broadway) or more of a town center (spread out to side streets perpendicular to Broadway and on Broadway)?

These are the children's responses:

<u>Elementary School Child</u> (n=3)

- Recreational spaces
  - A place to play hide and seek and tag
  - Field

- Play on tree trunks
    - A pool in our neighborhood (Dakota Ridge) or nearby (three kids requested this)
    - Park designed with giant candy corn sculptures (giant candyland playground)
    - toys outside, both big and little
    - zoo
- Businesses
    - toy store
    - Candy store
- Transportation
    - Better places to bike and walk; too scary to bike from home in Dakota Ridge down Broadway to shops there

Middle School Youth

- Business:
    - Bookstore
- Transportation
    - Bike path
- Recreational spaces
    - Park with a field
    - More trees

High School Youth (n=4)

Mara Mintzer, Dakota Ridge neighborhood resident, sent the following email to high school students she knew within the neighborhood:

> *I am working with the City of Boulder to update their plans for how North Boulder/North Broadway (the area near and across from Protos and Spruce Confections) should develop. I want to make sure the voices of teens are heard in this plan. If you have a few minutes, could you please send me your answers to the following questions, and I'll pass your ideas along to the City:*
>
> *What do you like or not like about North Broadway? What would make it more teen-friendly?*
>
> *Your answers might include ideas for new businesses, places to hang out, things to do, or ways to get around. You might also think about how the National Guard Armory could redevelop.*
>
> *Thank you in advance for taking the time to answer these questions. Your answers will help shape the future of your town! Also, feel free to share these questions with your friends living in North Boulder.*

These are their responses:

- It would be really cool to have a safe bike route from Dakota ridge to Protos area. Also, the location of the bus stop can sometimes be scary due to the characters that hang around there, and is such a bummer if you want to go into town via RTD by yourself (with out friends/ parents). Making that environment more secure feeling. I think if some popular business came to attract more people, there would be others around and teens would feel safer. I'll pass this along to some of my other North Boulder friends!
- A small business for local artists would be cool. Just a place where people can sell things they have made (art, toys, jewelry etc.).
- More ice cream or frozen yogurt shops—a place like Sweet Cow, where the ice cream is good and you can hang out on the astroturf lawn; also would be good to be able to hold an event there
- Less professional/adult places and more new and fun places, like the Apple Store
- The homeless shelter: it feels very uncomfortable to be near there at the bus stop, but additional businesses would make the area feel safer. I think it makes sense that homeless people share our community, but I don't want our community to be dominated by them to the point that I don't feel safe. I think they should treat Boulder with the same respect that other citizens have (i.e. don't talk too loudly or rudely on the bus or in the library). I don't feel safe taking the bus in the night or the early morning. The city should have an Ecopass for everyone so that more people take the bus and it feels more populated. I would also feel better if there were more police around and/or if there were a police person that the whole neighborhood knows.
- In the Dakota Ridge neighborhood: I walk my dog early in the morning (5:45 am) and sometimes late at night, and I don't feel safe. I saw a guy peeing in the bushes on 5th Street, I have seen people tagging the neighborhood, and I have seen people sleeping on the benches.
- The strip club is a real problem! Turn that area into an RTD hub.

Parent perspective (n=24)

On 11/7/2013, Mara Mintzer posted the following question to "Boulder Rock'n Moms Yahoo Group," a group utilized by a large number of parents (usually of small children) in the Boulder area:

> *North Boulder families: What do you like or not like about North Broadway? What are the key opportunities for that area? What actions can the City take in the new flood context?*
>
> *The City of Boulder is updating the North Boulder Subcommunity Plan, and they are looking for feedback from North Boulder residents about how the area of North Broadway (near, around and across from Protos) should continue to develop over the next 20 years. I want to make sure the voices of families and children are heard in this process. Please send me your ideas and the ideas of your children (no idea is too ridiculous) so that I can send them along to the City. I work for Growing Up Boulder (www.growingupboulder.org), in case you are wondering why I am asking these questions! Thank you in advance for your time.*

Twenty-four parents responded:

- There have been many voices to have some sort of water feature in north boulder and i completely agree. Although, I would take it a bit further than a splash pad... Boulder is lacking in quality outdoor aquatics! We have lived in a number of communities and this is the first where there isn't a great outdoor pool! We need a 50 meter/yard swimming pool, diving well, baby pool, and kid water play area. Please help bring this to north boulder!! I have seen other communities combine it with a skating rink and that would be great for skating and hockey... but please help with the pool!
- We would also love to see a play area for young kids. This town does a great job with fitness for adults and older kids, but there is hardly anything for young kids and practically nothing for toddlers and babies. A Gymboree or Peekadoodle would be amazing!
- More restaurants, please!! I know it may never happen but how about a healthy drive through? :) A Starbucks! We are always driving out of this community because there just aren't enough options. Believe me, if there were - we would be there bc it;s no fun to drive an hour round trip with little ones for food in the evening!
- I would love an arboretum or a botanic garden. The Chicago Botanic Garden is located in a suburb of Chicago so maybe we could have something like that here :) They had amazing train garden in the summer and moved it inside for the winter months (holiday theme). Kids loved it and it was amazing!!
- There need to be more teen hangouts. It would be great to have a skate park for teens in North Boulder. Scott Carpenter park is too crowded, with BMX bikes and skateboarders competing for space. Many of the skater kids hang out at Installation, a skating shop next to Whole Foods. The owner, Raoul, lets kids hang out there because they have nowhere else to go.
- A pool complex! With a splash pad play area, a kiddy pool and a big pool, and hot tub. Either public or private pool and tennis club.
  Indoor play space, with an indoor playground for crummy days. Look at
  Peekadoodle or Urban Recess as models. Both in San Francisco.
- I think relocating the Bus Stop strip club would be a great idea in a neighborhood where single family home prices are fetching upwards of 650k. I would assume that plan is in the works but know in general its better not to assume anything. Just my 2c. :)
- Yes! A huge splash pad in North Boulder Park.
- Another Lucky's grocer (sorry to whomever owns Lucky's; unless, they want a new project;) where the ROTC lot is (didn't it sell?).
- A pavilion at the community garden to block sunlight
- BURY the POWER-LINES ON GRAPE!!!
- I would love to see a library branch in north boulder.
- I think an indoor play space for the winter would be great and more storefronts, restaurants, shops would be great.
- I REALLY want to encourage folks to RESPOND TO THIS! In Boulder, suggestions from the community are often taken very seriously and actually implemented.
- My five-year-old's preschool class at Boulder Journey School, recently partnered with Growing Up Boulder on submitting ideas to revamp the Boulder Civic Area (around bandshell/Library/Dushanbe Teahouse/Boulder Creek). Not only did the City Council and designers listen to the kids and take their ideas seriously, the winning bid for the design consists mostly of ideas that came FROM THE KIDS! How cool is that?! When Boulder has an amazing, functional, family-friendly Civic Area to enjoy, you'll have a bunch of five-year-olds (among others) to thank :).
- A library would be great. And I second the indoor play space, retail storefronts, more cafés & restaurants. I'd love to see it all laid out in an interesting way, though. Like a winding pedestrian shopping area that one enters into, rather than just straight rows of shops along Broadway, would be cool. I'd love to hear other folk's ideas.

- Me too - an indoor play space (so lacking in Boulder) would be GREAT! There are so many families up here. And yes, more storefronts and placing for us to wander and visit during the day.
  I live in the Holiday neighborhood and think the big playground/park that was built down the street from Protos is terrible. It has no slides or swings or great climbing structures. It doesn't really make sense - Holiday is so community oriented and has so many families - but b/c the playground is pretty useless, no families with kids congregate there. I think it would make a HUGE difference to upgrade the park so people could have a place for kiddos of all ages to come and be with each other.
- My husband would like to see: at least one crosswalk and some kind of interactive trail for kids.
  Also, a playground with a splash pad or water play of some kind. There's so little shade up north because all the trees are so young. It's hot up there!
- So ladies my husband and I are considering opening an indoor playspace and would love to get feedback from people as to the type of things they are looking for. I have a concept but would love more input.
- Are people looking for a place to drop kids and come back or a fun place to hang while their kids play? Any input appreciated.
- It is so true- I don't understand that playground at all! We've visited it a couple of times when we stopped to check out the little library right there and my kids were done after about 2 minutes. They were more interested in running around the large grassy area.
- For the indoor playspace, this is a great model. I've been to the one in Oakland, CA several times and loved it. http://www.tumbleandteacafe.com/
- There used to be a place in N. Boulder called Playgrounds - from what I understand, it was a profitable business, but the people who started it had to move back east for family reasons and no bought it from the.
- Me personally, I love to hang with other parents and I am not comfortable dropping my kiddos off somewhere - so I am looking for a nice space that serves tea/snacks/etc - has lots of places for mommas and papas to chat and lots of safe, soft toys for kiddos to play on (think play - the new grandrabbits place), but with wifi, tea, food and tables for parents that don't have to supervise their kids 100% of the time. On that note, I'd also put out some really strong rules about kiddos who do need supervision and have parents that don't provide it, impacting everyone else, but that's another story.
- I would be happy to share more about playgrounds and/or other ideas (in my pre-children life, I was a pretty sharp marketing/business chick)...
- I had a similar idea a while back, but I wasn't prepared to raise funds, do a biz plan, etc., back then. When I visit my parents in Holland, MI, I take my daughter to Deanna's Playhouse, and I based my idea on it: http://lifeservicessystem.org/deannasplayhouse/index.html
- While Deanna's is a Christian-based, non profit combination play space and Parenting Place with wonderful parenting support and resources, I wanted to create just the play space. But now that Parenting Place is closed, perhaps this is an opportunity for you to pick up where they left off and provide similar services as well as a play space.
- Deanna's is huge, and is sponsored by local businesses with a $5 per person entry fee, keeping it accessible to lower income families. There are different activities and areas for babies and kids up to age 5, including an art room, music room and dress-up/stage. I think the liability of drop-off places is pretty big, and you would have to have highly trained employees, but it sure is convenient for parents. Deanna's is not drop-off, and in fact, they encouraged parents to play with their kids and not sit on the sidelines. You would have to decide if you want to keep the price low to allow economic diversity, or if you want it to be a premium destination. I would love for a play place to have a breadth of activities from non-electronic media to creativity zones to indoor play structures. Birthday parties too!
- My husband and I were just talking about this because we were in Westminster at JumpCity. There isn't a lot of indoor options for kids in Boulder. You have to go to the burbs. I looked into this once as business to possibly open. The challenge was the amount of space needed and the CRAZY prices here for leasing a building like that. The math just did not add up. Especially having to account for the slower summer months. I'm wondering if a space like that could get a bit of a price break? But, if offered some parenting services, maybe some grants would help.
- I think it would be awesome to have some sort of play place that was indoor and outdoor. If we are throwing out our ultimate wish list. I would love to have a super awesome indoor and outdoor pool. North Boulder Rec is pretty good, but it would be great to have something like that Indoor, but than an awesome outdoor pool for the summer. Something with fountains, slides, etc.
- But, something like that at our end of town would bring people from other parts of Boulder to our hood to eat, drink, shop, etc.
- Does anyone know if there is going to be any type of community meeting or anything to discuss?
- Mara- I love that you posted this question here, you know I have an opinion:)

- An outdoor pool. Please. There are plenty of people from the South in the N. Boulder hoods and we just want our dang neighborhood pool like we had when when we grew up. A modern one like at Colorado Athletic Club. Not a horrible 1970's pool. Not directly in Dakota Ridge but close too it :)
- Indoor play space- would love to have a Little Monkey business somewhere, just not sure if I want in N. Boulder. I don't want N. Boulder to become big box-ish or chain store-ish. Commercial but like W. or E. Pearl.
- Walkable. N. Boulder destinations need to be walkable and connected by walking paths.
- Something that encapsulates outdoor living, but not necessarily another playground. An amphitheater and park like Chastain Park in Atlanta.
- Trees. Plant lots and lots of trees. Again a Southern thing.
- More restaurants and small cafes.
- Less industrial feel. Something to balance all the auto shops and storage units and U-haul establishments. Happy to co-exist but they are an industrial eye sore in my opinion. Not to make it too Stepford but I do in fact like that Connecticut towns require business and storefronts to adhere to a certain aesthetic for signage, building facades, etc. N. Boulder is the place to do that if Boulder ever did.

- I agree with a lot of what has already been said but would like to throw in my support for the following:
    - improvement of Holiday Park with better play structures;
    - an outdoor pool or at least a splash pad/fountain/water play area for kids (maybe at Foothills Community Park?);
    - an indoor play area would also be great (there used to be a place in Denver called The Village that had an indoor play area with an attached cafe that served food, coffee, wine and beer, etc.; it also held music, art, and other classes for kids and cooking classes for adults. Parents had to stay with their kids but I think a place where you could drop your kids off would also be great);
    - grocery store;
    - more retail, including restaurants. A family-friendly burger-beer place would be awesome (something like Southern Sun up here!);
    - library branch (more than what is going in at Yarmouth and Broadway).
  - That's great you are considering opening a play space in N. Boulder. I had some feedback from indoor play spaces that I have bad experiences at to try to know what parents AREN'T looking for:
      - Parents that don't supervise their children, who are on their electronic devices and oblivious to everything else going on around them. I would almost say you should have a no-electronic device rule at the door.
      - Parents that have a kid that is too sick to go to daycare, or who has been sent home from daycare and bring their visibly sick kid (mucus running down their face, coughing, etc.) to the play space. The play space needs to be vigilant about cleaning.
      - Playspaces that have dangerous or not maintained pieces. I went to bouncetown one time in Longmont and one of the bounce castles was not inflated enough, and no employees or parents were supervising the kids, and one kid managed to push a stick up tube, down inside the bounce castle and then got himself stuck face down in the hole and almost suffocated before I had to go get his parents/store employees to get him out.
      - The JCC has a very simple tumbling room with lots of padded shapes that you can re-arrange and climb over which i really like.
- My husband and I feel we need:
    - More shade at all the parks, especially over the play structures
    - Water features, such as a pool and splash pad (most other Boulder neighborhood have this as part of their HOA or in the form of a public pool within easy walking/biking distance)
    - A fun, kid-friendly playground in Holiday
    - A safe bike-route on or near North Broadway (not safe for kids or cautious adults right now)
    - Indoor play space—both for little kids and another for bigger kids
    - Increased safety at the bus stop in front of the homeless shelter
    - More family-friendly restaurants—similar to Proto’s (but we get sick of pizza every week and Proto’s can be expensive)

FOOTHILLS ELEMENTARY: CHILD INPUT FOR NORTH-BOULDER SUB-COMMUNITY PLAN

Sample: 24 6-7 year-old children in grade 1 class at Foothills Elementary, Boulder, CO. (Note: This was a small convenience sample).

I. The City on the Wall

Method

- This activity was based on Stanley King's method *The City on the Wall (*http://youthmanual.blogspot.com/p/city-on-wall.html)
- The facilitator drew an 'original wild landscape,' and a person (you) arriving in a canoe, then asked the question: "What do you see, feel and smell here?" Next, the first house was built, then some friends' houses, and finally the glue factory, which children asked to be placed further away.
- Next, children were asked to draw on this landscape what they would like to see in their city (results in section a. below). This took place in groups of six. During this process the other three groups were asked where they currently like to go, and what activities they like to do in their actual city (results in section b. below).
- A discussion followed, where children were asked the following questions: "What do you see, or smell now?" "What do you like that would make you want to live here?" "Why would you not want to live here?" (Results in section c. below).
- In the final section of this activity children were asked: "What is the most important thing you would like to see in your city?" (Results below in section d.).

Results

a) City on the Wall drawing (see below). This drawing has numerous buildings, some parks, trees and play-structures, and is quite crowded and chaotic (which is generally the result of this activity). The children did not include any mode of transport other than walking (i.e. there were no depictions of cars, bikes or roads).

b) Answers to the question "Where do you like to go/what do you like to do in your city" fell under three general categories: City-based retail activities, city-based indoor/outdoor activities, and nature-based outdoor activities (see Table 1.).

Table 1. Children's Favoured Activities

City-based Retail	City-based Indoor/Outdoor Activities	Nature-based Outdoor Activities
Ice Cream	Swimming Pool	Boulder Reservoir
Toy Store	Football	Hike
Museum	School	Kayak
Mall	Roller-coaster	Camping
	Gymnastics	Summer Camps
	Swing on bars	Fishing
	Tag	Boulder creek – walk dog
	Sand Box	
	Play cops and robbers	
	Play hide and seek	
	Play with friends in park	

	Carnival

c) Discussion of The City on the Wall image: Children's answers to the four questions are presented in Table 2.

Table 2. Children's perception of their 'City on the Wall'

What do you smell?	What do you see?	Why would you live here?	Why would you not live here?
Smoke	Happiness	Like trees	Too crowded
Bagels	Crowded		Too polluted
Garbage	Lots of trees		Small place with lots in it
Ice Cream	Glue factory nicely separated		Hard to find your way with all the houses
	Homes, spread out		
	Big difference from when it started – now it is a lot more polluted		

d) Table 3 shows the important things children said they would like to see in their city. The responses were divided into three major categories: Built structure, Nature/Environment, Other.

Table 3. Children's choices of important things in a city

Built Structure	Nature/Environment	Other
Pickle store	Nature	Peaceful song
Ice Cream Store	Crystal Cave	Skydiving off roofs
Animal Shelter	Hills	
Zoo*	Zoo*	
Mall	Waterfall	
American Girl Doll Store	Nature and green to be pretty	
Bakery	Park	
Big outdoor pool	Woods to be alone, with only birds around you	
Children's Library **	No pollution	

* Response included in two categories

** Teacher's response

II. Drawing Activity

Methods

The second activity was an extension of the first, asking children to create individual drawings of what they would like to see in their ideal city.

Results

The majority of children depicted **their homes** (n = 16) or **themselves** (n = 13) surrounded by **nature** (19). Most common forms of nature were the combination of green fields, trees and flowers (14). Many children also drew rivers and mountains, some included forests, one a green roof, one a vegetable garden, and one a crystal or diamond cave.

Two other major themes emerged with the analysis of the drawings: **Built structures**, other than one's home, were highly prevalent. These structures were most commonly a friend's house (4), or a store. Stores would be the following: candy store (2), general store (2), a toy store, rock store, bakery, and a pickle store. Other buildings included a homeless shelter, two animal shelters, dog-houses, a zoo, the White House, and a factory. Outdoor built structures were two playgrounds, two football fields, a pool, and a soccer field. **Animals** were also commonly depicted (in 10 drawings), mainly showing companion animals such as dogs, but birds or fish were also present, and in one case a ladybug, and one a monkey.

A large portion of children who drew themselves and other people, had the person pictured in an outdoor environment, about half the time participating in an **outdoor activity** (12 drawings). Only two children drew a person inside a building (one in own home, one in toy store). Most common outdoor activities were walking, riding a bike and riding in a boat. Other activities were hiking, paddle-boarding, climbing, walking a dog, swimming, playing in a garden or playground, sky-diving, and climbing a tree.

Less than half the children (n=9) included modes of **transportation** in their pictures. The major form of transportation depicted was walking, followed by riding a bike. Although roads or path were drawn in many cases, only two children drew cars, and neither put themselves in the vehicle. Public transportation was not depicted in any of the drawings.

About half of the children (n = 12) also used words, sentences or phrases to describe their ideas and recommendations. Listed below are the children's relevant quotes:

"Trees, nature."

"Zoo animals."

"I love biking!"

"I want to live in the mountains and get food from nature! I'll visit the animal shelter every day! I'll lay on the warm grass and listen and look at the birds!"

"I love my Mama. I love an love an love!"

"No polluted air."

"Make airplanes, make boats."

"Peaceful cabin in the woods."

"Not polluted air."

"I love to bike and swim and a peaceful song."

"I love the hot."

APPENDIX 3: 1995 PLAN IMPLEMENTATION BACKGROUND

The North Boulder Subcommunity Plan contains numerous recommendations, many of which have been implemented. These recommendations range from new development and design standards, capital investments in civic facilities, and new transportation connections. Some of the key items from the 1995 Plan that the city has implemented include:

- **Five new zoning districts**, including a Business Main Street (BMS) district that was used for a rezoning for the Village Center area;
- **Numerous new parks** in accordance with the 1995 Plan, including Foothills Community Park and Holiday Neighborhood Park;
- **Several annexations** of county enclaves consistent with the 1995 Plan; and
- **New transportation connections** made in accordance with the 1995 Plan as redevelopment has occurred.

1999 AND 2012 NORTH BOULDER AERIAL IMAGES

1995 PLAN IMPLEMENTATION SUMMARY

Category	Implementation Item and Description	Implementation Status
Zoning and Land Use	**New Zone Districts and Development Standards** The 1995 Plan contains numerous recommendations for new North Boulder zone districts and development standards.	Five new zoning districts were created and properties were subsequently rezoned to: • A business main street zone, patterned after historic 'Main Street' business districts; • Three mixed use zones that provide a transition between the higher intensity business 'Main Street' and surrounding residential or industrial areas; and • A mixed density residential zone district.
North Broadway Area (Village Center and Yarmouth North)	**Village Center** The 1995 Plan calls for a Village Center concept on both sides of Broadway at around Yarmouth Avenue.	• The city has rezoned properties in the Village Center and Yarmouth North areas to BMS, MU-1, and RMX-2 (see current zoning map to the right). • The east side of the Village Center has seen significant redevelopment, but the west side has not. • These redevelopment areas have been largely consistent with the plan's goals for vertical mixed use and pedestrian-oriented design.
Community Facilities, Parks, and Open Space	**Parkland** The 1995 Plan recommends several new parks throughout the subcommunity.	Since 1995, the following parks have been built or are in the process of being built: • Foothills Community Park • Neighborhood Park on the Mann property • Holiday Neighborhood Park • The Elks Neighborhood Park is in the 2013-2018 Capital Improvements Plan • Dakota Ridge Neighborhood Parks
	North Boulder Library The 1995 Plan recommends a new Boulder Library branch in North Boulder	The NoBo Corner Library opened in 2014 at the corner of Yarmouth and Broadway. The 1995 Plan and many community members still supports a full service library in North Boulder.

1995 PLAN IMPLEMENTATION SUMMARY

Category	Implementation Item and Description	Implementation Status
Annexation	The 1995 Plan supports annexation of county enclaves (Area II properties) in the North Boulder Subcommunity.	Since 1995, several county enclaves have annexed into the city in the North Boulder Subcommunity. The map below highlights these areas: **ANNEXATIONS SINCE 1995 (OUTLINED IN RED)** 
Transportation and Streetscape	**Development Compliance with Transportation Plan** The 1995 Plan recommended a new requirement for compliance with the Transportation Plan during development or redevelopment.	The city adopted an ordinance that requires dedication or reservation of Rights-of-Way in conformance with the North Boulder Subcommunity Transportation Plan.

1995 PLAN IMPLEMENTATION SUMMARY

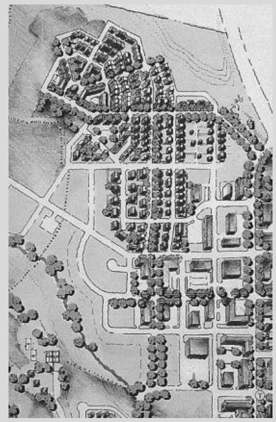
Category	Implementation Item and Description	Implementation Status
	North Broadway Streetscape The 1995 Plan recommended development and implementation of streetscape improvements along North Broadway	A draft North Broadway Streetscape Plan was developed and has been used as a guide to establish the streetscape design for Broadway from US 36 to Upland and improvements that were required when properties redeveloped (e.g., street trees, benches, lighting, on-street parking).
	Auto/Transit Improvements Right-of-Way Plan The 1995 Plan calls for transportation connections that encourage walking, biking, and transit use.	**Connectivity:** As new development has occurred in North Boulder (particularly north of Violet Avenue), connectivity has been enhanced by introducing more of a street grid consistent with the Auto/Transit Improvements Right-of-Way Plan. Streets have generally been designed to be narrower and more pedestrian friendly. **Enhanced Transit:** The 1995 Plan calls for enhanced transit service in North Boulder. The Auto/Transit Improvements Right-of-Way Plan recommends circulator transit routes through some of the North Boulder neighborhoods along with a route along US 36 connecting to shopping areas along 28th Avenue. Currently, bus service along Broadway only extends to Front Range Avenue and Broadway (one block north of Lee Hill Road). **US 36 Gateway:** The city has also not implemented a gateway feature where Broadway intersects with US 36, as recommended by the plan.[1]
Stormwater Utilities	The 1995 Plan recommends protection for riparian areas and utilization of flood plain areas for bicycle and pedestrian travel.	While not a specific implementation item from the 1995 Plan, the city completed the Fourmile Canyon Creek and Wonderland Creek Major Drainageway Planning effort in 2011. This document will inform future planning and development decisions in North Boulder, particularly in the Village Center area. Staff does not anticipate any updates to this study.

[1] See page 22 of the 1995 North Boulder Subcommunity Plan.

North Boulder Subcommunity Development Activity (1995-2013)

The 1995 Plan sets forth specific estimates for future growth in the North Boulder Subcommunity. Staff analysis of building permit records from 1995-2013 reveal the North Boulder Subcommunity is:

1995 Plan Concept for Lee Hill Road Area



2013 Development Pattern

The above images illustrate how the 1995 Plan helped shaped development patterns.

- **Approaching the 1995 Plan's Estimate for New Residential Units** - The 1995 Plan approximated between 1,629-1,784 new housing units would be built within "about 13-17 years" in the subcommunity based on a number of factors.[2]. According to city building permit records, approximately 1,700 new housing units have been built since the 1995 Plan. The city's growth projections for the North Boulder Subcommunity estimate an additional approximately 550 housing units by 2035.[3]
- **Adding More Retail than the 1995 Plan Estimated** – The 1995 Plan estimated 85,000 square feet of new retail subcommunity-wide. Since 1995, about 178,000 square feet of new retail has been built.
- **Adding Office Space at Faster Rate than the 1995 Plan Estimated** – From 1995 to 2013, the amount of new office space increased by 291% from approximately 100,000 square feet to approximately 391,000 square feet, exceeding the 1995 Plan's estimated new office space of approximately 299,000 square feet.

The tables that follow provide a more detailed summary of residential and nonresidential development activity since the 1995 Plan, along with existing land use and zoning.[4]

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[2] These factors included Boulder Valley Comprehensive Plan density assumptions by zone district and growth rates consistent with the North Boulder projections from the Integrated Planning Project.

[3] The city's growth projections use a variety of factors from current zoning to future land use, to more qualitative analysis of specific sites with growth potential.

[4] SOURCES: North Boulder Subcommunity Plan, city building permit records. The numbers reflect building permits where Certificates of Occupancy (C.O.) were issued between 1995 and 2013. There are several developments under review that have not received C.O.'s to date.

NORTH BOULDER SUBCOMMUNITY-WIDE RESIDENTIAL DEVELOPMENT ACTIVITY (1995-2013)

	1995 Total	Percent of 1995 Total	1995 Plan Estimate for Future Units	New Since 1995	Total Units 2013	Percent of Total Units 2013	Increase 1995-2013
Attached Units	1,084	27%	n/a	1,096	2,180	38%	101%
Detached Units (includes mobile homes)	2,930	73%	n/a	635	3,566	62%	22%
Total North Boulder Subcommunity Wide Housing Units	4,014	100%	1,629-1,784 New Units	1,731	5,745	100%	43%

NORTH BOULDER SUBCOMMUNITY NONRESIDENTIAL DEVELOPMENT ACTIVITY

	1995 Count (sq. ft)	Percent of 1995 Total	1995 Plan Estimate for Future Square Footage	New Square Feet Since 1995	Total Square Footage 2013	Percent of Total 2013	Increase 1995-2013
Retail	200,000	27%	85,000	178,177	463,177	28%	89%
Office	100,000	13%	299,000	291,057	690,057	42%	291%
Industrial	450,000	60%	n/a	45,969	495,970	30%	10%
Total	750,000	100%		515,203	1,265,203	100%	69%

Existing Zoning and Land Use in the North Boulder Subcommunity

The following tables illustrate the current zoning and land use conditions in the North Boulder Subcommunity. Generally, the data shows that:

- Most of the subcommunity is zoned low or medium density residential;
- A significant portion of the subcommunity is zoned and used as public (open space, parks, etc);
- A higher percentage of land is *classified* as a commercial land use than the amount of land that is *zoned* for commercial, and
- A lower percentage of land is *classified* as an industrial land use than is actually *zoned* industrial.

EXISTING LAND USE BY LAND AREA, NORTH BOULDER SUBCOMMUNITY[5]

Name	Acres	Percent
Agricultural	1.0	0.07%
Commercial	103.7	6.9%
Industrial	3.7	0.2%
Mixed Use	11.4	0.8%
Residential	1,088.5	72.4%
Public/Institutional	204.7	13.6%
Vacant	90.7	6%

EXISTING ZONING BY LAND AREA, NORTH BOULDER SUBCOMMUNITY

Zone District Category	Acres	Percent
Agricultural	17.8	1.0%
Commercial	23.9	1.2%
Industrial	120.1	6.0%
Mixed Use	34.8	1.7%
Residential	1,391.1	69.9%
Public/Institutional	222.5	11.2%

[5] SOURCE: Boulder County Assessors Office (based on how the county classifies land uses, which may not align with city zoning classifications).

MAJOR DEVELOPMENTS IN NORTH BROADWAY AREA (1995-2013) Date: 8-15-13

	Construction Date	Approx. Site Size	Characteristics
1. Holiday 	2003-2005	27 acres	324 residential units (187 market rate units and 137 permanently affordable units), 55,164 square feet of non-residential space and a 1.7 acre park.
2. Dakota Ridge 	2001 – present	42 acres	420 residential units composed of 195 apartments, 65 townhouses and 130 single-family homes, and 30 (possible) commercial area conversion units. In addition, 23,025 square feet of office/retail space is located in the Neighborhood Center.
3. Uptown Broadway 	2003, 2008	8.5 acres	223 residential units and 40,337 square feet of mixed use commercial space
4. Westview 	2011-2012	1 acre	34 permanently affordable residential units that meet the affordable housing requirements for the development for the Residences at 29th
5. Foothills 	2001-2002	5 acres	75 permanently affordable units in duplexes, fourplexes, townhomes, apartments, carriage units, a group home and a community center
Pipeline/Under Review			
6. 820 Lee Hill	2014 (expected)	6 acres	32 single family detached homes proposed
7. Violet Crossing	2013 (expected)	4.7 acres	10 two- and three-story buildings that house 78 market rate apartments and 20 affordable apartments
8. 1000 Rosewood	2013 (expected)	4.5 acres	18 dwelling units (16 single family units, 2 duplex units)
9. 1175 Lee Hill	2014 (expected)	1.2 acres	2 story multifamily transitional housing with 31 units

Total number of housing units in pipeline/under review: 179 (including 31 transitional housing units)

APPENDIX 4: IMPROVEMENT DISTRICT BACKGROUND

An improvement district is a private sector initiative to manage and improve the environment of a business district with services financed by a self-imposed and self-governed assessment. Similar to a common area maintenance (CAM) charge commonly found in shopping malls and office parks, improvement districts can help a business district increase its competitiveness in the regional marketplace. Services financed by an improvement district are intended to enhance, not replace, existing city services.

Benefits of Improvement Districts

Benefits from improvement districts, which can stretch well beyond their boundaries, include:

- Creating and maintaining a cleaner, safer and more attractive business district;
- Ensuring stable and predictable revenues;
- Providing innovative management;
- Responding quickly to market changes and community needs;
- Promoting distinct identities in business districts;
- Leveraging resources; and
- Creating a unified voice to increase a business district's influence.

Colorado Improvement Districts Law

Colorado's Improvement District Law of 1988[1] includes the following key provisions:

- Improvement districts can finance a wide variety of services, including marketing, maintenance, economic development, public safety, planning, events, and parking management.
- Improvement districts are accountable to those who pay through an improvement district board of directors comprised of property and business owners within the district.
- Services financed by an improvement district are usually provided by a private sector organization, not government.
- Improvement districts require demonstrated support from owners of personal and real property representing more than 50% of assessed value and acreage.
- The "Taxpayers Bill of Rights" (TABOR) requires a vote by owners of real and personal property and lessees and residents of commercial property within a district to approve the assessment.
- Controls and safeguards can include a cap on assessments and a periodic review to ensure that improvement district services are effective.

Boulder Improvement Districts

Current city improvement districts and their purposes include:

- <u>Boulder Junction Access and Parking Districts</u>: Created in 2010 for parking related services and improvements and providing travel demand management programs such as EcoPasses, car share, and bike share. Property tax based with parking revenues and bonding capacity.
- <u>Central Area (CAGID)</u>: Created in 1970s for parking and related improvements, property tax based with bonding capacity.
- <u>University Hill (UHGID)</u>: Created in 1970s for parking and related improvements, expanded in 1987 to include public right of way maintenance, streetscaping, landscaping, signage, etc. Property tax based with parking revenue and bonding capacity.
- <u>Downtown Business Improvement District</u>: Created in 1999 in the downtown for enhanced maintenance, marketing, and business development. Property tax based.
- <u>Forest Glen EcoPass District</u>: Created to pay for EcoPasses for residents, property tax based.

[1] C.R.S 31-25-602.

Colorado Special Financing Districts Summary

	Business Improvement District (BID)	Downtown Development Authority (DDA)	Urban Renewal Authority (URA)	General Improvement District (GID)	Special Improvement District (SID)
Background	Quasi-municipal organization is a subdivision of the state. All property assessed in a BID must be commercial. Boundary may or may not be contiguous.	Quasi-municipal organization intended to halt or prevent deterioration of property values or structures in Central Business District.	Established to eliminate blighted areas for redevelopment by purchasing, rehabilitating, and selling land for development.	Quasi-municipal organization that is a subdivision of the state. Can provide a wide range of services.	An assessment district which is not a subdivision of the state, nor is it separate from the municipality.
Focus Areas	Management, Marketing, Advocacy, Economic Development	Real Estate Development, Infrastructure, Operations	Real Estate Development, Rehab, Financing, Infrastructure	Capital Improvements, Public Facilities, Maintenance	Capital Improvements, Infrastructure
Formation Process	Approval by petition of property owners representing 50% of acreage and 50% of value of proposed district; Council ordinance; TABOR election.	City ordinance subject to vote by affected property owners; TABOR election.	Finding of blight; Petition by 25 electors; Council resolution.	At least 200 or 30% of, whichever is less, electors of the proposed district must sign petitions; If all taxable property owners in the district sign a petition, public hearing can be waived.	Need petitions from property owners who will bear at least 50% of the cost of the improvement; ordinance forms district.
Assessment Method	Assessment or mill levy on commercial property	TIF on property and/or sales and 5 mill property tax for operations	TIF on property and/or sales tax	Property tax and income from improvements	Assessments on property
Pros/Cons	Very flexible entity that can finance improvements and provide services.	Ability to finance improvements and provide services; through general mill levy and TIF increment. Needs approval from other county entities to collect increment.	Can generate sales and/or tax increment to finance future development. Increment needs approval from county entities.	Only those in district can authorize and pay for improvements. Requires petition and election.	Equitable: only those who benefit pay. Difficult to form – requires election. City constructs improvements.
Governance	Minimum 5-member board appointed by Mayor or governing body; Can also be elected.	5-11 member board appointed by City Council.	5-11 member commission appointed by City Council.	Governing body is ex-officio board.	City Council
Can they…					
Operate Facilities?	Yes	Yes	Yes	Yes	No
Levy property tax with voter approval?	Yes	5 mill property tax for operations	No, but can use TIF	Yes	No
Levy sales tax with voter approval?	No, but may create SID within BID	No, but can use TIF	No, but can use TIF	No	No
Issue GO bonds with voter approval?	Yes	Bonds secured by property tax	Yes	Yes	No
Issue revenue bonds?	Yes	Increment can be issued by municipality	Yes	Yes	Yes
Issue special assessment bonds?	Yes	No	No	Yes	Yes

Source: Progressive Urban Management Associates, Colorado Revised Statutes 31-25