

AGENDA REVIEW
June 30, 2022
CITY COUNCIL MEETING JULY 19, 2022

Neighborhood and Business Development

Intro. No 255 – Authorizing the preparation of a plan for a Downtown Business Improvement District

Additional Questions

Q: When would it be expected that Council will vote to establish the BID?

A: Per the draft timeline below, (now slightly out of date), it is anticipated that Council would vote to approve creation of the BID in spring 2024.

- ***City Council, Vote #1 (May/June 2022)*** – Approve legislation authorizing preparation of a BID district plan
- ***District Plan Development (May 2022 – June 2023)*** – Develop BID alternatives, solicit feedback from proposed district payers, identify majority-preferred BID model, draft District Plan document
- ***Petition Process (June – August 2023)*** – Design and execute petition process, deliver approved District Plan to Mayor Evans
- ***File Plan & Supporting Petitions with City Clerk (October 2023)***
- ***City Council, Vote #2 (November 2023)*** – Adopt resolution on public hearing, providing 30 days for any objections to be filed
- ***City Council, Vote #3 (December 2023 – January 2024)*** – Approve forwarding District Plan to NYS Comptroller for review & approval (usually takes 60 days)
- ***City Council, Vote #4 (April – May 2024)*** – Approves creation of BID assessment district
- ***City Council, Vote #5 (April – May 2024)*** – Approves RDP as the BID management entity
- ***BID Begins Operations (July 2024)***

Q: Who is the consultant that RDP will use to create the plan?

A: The RDP Board selected the team of Urban Partners (Philadelphia, PA) and Civitas Consultants LLC (Silver Spring, MD) to develop the District Plan. Their proposal is attached. ATTACHMENT A

Q: Will the levy be charged to all businesses within the district's boundaries, or will there be an earnings threshold at which the level will be applied? If so, what would that threshold be? If not known, please provide an example from 2-3 other cities.

A: Businesses will not be charged a levy, only property owners. The specific assessment formula is yet to be determined and will be developed in collaboration with the property owners within the proposed District boundary, which is also still to be determined.

Q: The State Constitution limits the taxing power of cities to 2 percent of the five-year average full valuation. According to section 980-K of the enabling legislation, it appears the BID will count towards Rochester's tax cap. Could a BID, levying extra taxes affect our bond rating?

A: The BID levy would count against the State-mandated 2% tax cap. The exact implications of this will be considered during the development of the District Plan and may become moot if pending State legislation exempts BID levies from the tax cap. Regarding the City's bond rating, it is not anticipated that any BID levy will have an adverse impact.

Q: Please provide the RTR Study from Jan 2020 reference in the transmittal.

A: See attached. ATTACHMENT B

Q: Please provide a listing of the membership of the following groups, including affiliation and leadership roles they play in the group: Roc the River Way, RTR Management Entity Working Group, RDDC Board, RDP Board, and the BID Formation Committee?

A: ATTACHMENT C



ATT. A

Proposal: Downtown Rochester BID Development Services



Proposed by:

CIVITAS
Consultants LLC

&

URBAN PARTNERS

in association with:

Civic Ventures

**Glass House
Consulting**

March 23, 2022

URBAN PARTNERS

COMMUNITY & ECONOMIC DEVELOPMENT

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March 23, 2022

Ms. Heidi Zimmer-Meyer, President
Rochester Downtown Development Corporation
Five Star Bank Plaza
100 Chestnut Street, Suite 1910
Rochester, NY 14604

Dear Ms. Zimmer-Meyer,

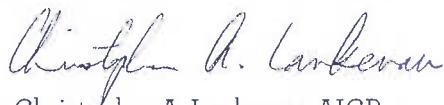
Urban Partners, through a partnership with David Feehan of **Civitas Consultants**, together with **Civic Ventures** and **Glass House Consulting**, is pleased to submit the following proposal to provide the Rochester Downtown Development Corporation (RDDC) with consulting services for instituting its first business improvement district (BID). As you will see in the proposal, the Civitas/Urban Partners team possesses the full spectrum of skills and experience necessary to complete this exciting assignment.

The Civitas/Urban Partners team has worked with numerous clients to successfully implement BIDs throughout the country and beyond. As President and CEO of the International Downtown Association, Mr. Feehan worked with members of BIDs throughout the world. He helped lead the team that organized the first BID in Central America. While he has also worked with BIDs in Canada, Europe, and South Africa, most of his experience is in the United States. Mr. Feehan has also created and managed a BID in Des Moines, Iowa. Urban Partners is currently working with a community organization in North Philadelphia to create a new BID in its commercial district. The firm previously worked with Mr. Feehan to successfully create a new bid in the Philadelphia suburbs. Civic Ventures and Glass House Consulting also bring significant experience to the team with successful BID efforts in communities as diverse as New York City and Sioux Falls, South Dakota.

This proposal contains a response to all items requested in the RFP. We have divided our suggested work plan into four phases that align with the requirements of the New York State law regulating the establishment of BIDs. Our fee reflects this scope of services. While we have offered a suggested methodology, we are open to modifying certain tasks to address specific concerns. Our intent is to provide you with the most useful product for the best value.

We appreciate the opportunity to present our team and our detailed approach for this assignment. Please feel free to contact me at (215) 829-1901 or clankenau@urbanpartners.us with any questions about our proposal. Mr. Feehan can be reached at (202) 288-0528 or civitas.dave@me.com.

Sincerely,



Christopher A. Lankenau, AICP
Principal

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Introduction

The Civitas/Urban Partners team has more than a 40-year track record of providing high quality services to our clients. The team members assembled for this project have successfully completed numerous business improvement district (BID) planning initiatives in communities throughout the state, nation, and the world. As this proposal will demonstrate, our team possesses the full spectrum of skills and experience necessary to complete a successful BID effort in Downtown Rochester as well.

The series of questions outlined in the RFP and addressed below, provide an appropriate starting point for introducing the components of this proposal:

1. *What services can you provide to assist communities like ours in the development of a new downtown business improvement district?*

Our team can provide all the services necessary for RDDC to develop a new BID. These services include:

- Planning (district delineation, case study examination)
- Technical analysis (database management, fee calculation)
- Community outreach (stakeholder engagement, survey administration, engagement of property owners)
- Facilitation (steering committee and staff coordination, meeting presentation)

See the Team Overview, Qualifications, and Scope of Work sections below for more detail on the services we will provide.

2. *What makes your firm unique in this field?*

Our team is unique for several reasons:

- We have worked with over 200 BIDs around the world in both the capacity of organizing and management
- We have experience with BIDs in New York State
- We have knowledge of and experience with the organization and operation of city government
- Several team members have extensive CEO experience
- We have experience in techniques of gaining community, stakeholder, and elected officials' support for BID formation

See the Team Overview and Qualifications sections below for more detail on why we are unique.

CIVITAS/URBAN PARTNERS

3. *In which communities have you guided the successful establishment of a BID?*

As mentioned, our team has worked in hundreds of communities—large and small—where successful BIDs have been implemented, including:

- New York, NY
- Des Moines, IA
- Minneapolis and St. Paul, MN
- Cleveland, OH
- Sioux Falls, SD
- Pittsburgh, Lebanon, and Souderton, PA
- Washington, DC
- Windsor, ON
- San Salvador, El Salvador
- Nassau, Bahamas

See the Qualifications section below for more detail on where we have worked on successful BID projects.

4. *What are the top three stumbling blocks you have found in your BID creation work?*

Creating a new BID can indeed involve multiple challenges. In our experience, the following are the top three:

- Acceptance of property owners towards paying a BID assessment
- Encouraging some tax-exempt entities that benefit from the BID to make a payment in lieu of the assessment
- Inability to contact property owners as many are absentee or are represented by agents, banks, etc.

Our Scope of Services below outlines a process that will hopefully minimize these challenges.

5. *What is your fee schedule for this kind of work, and how does the fee break out over a two- to three-year period?*

The team proposes a fee of \$83,042 for this work. The bulk of the fee will be expended from April 2022 (project kick-off) to October 2023 (plan submitted to City Clerk) when the BID plan is developed and most of the outreach occurs. For the subsequent year (through May 2024), the fee will go mainly toward continued outreach and any assistance with the legislative phase.

See the Cost Proposal and Timeline sections below for more detail on our proposed fee schedule.

Team Overview

We believe the Civitas/Urban Partners partnership exhibits a series of characteristics that distinguish the team from others and enable us to provide quality services and work products to our clients:

- We are an intentionally small team. RDDC can expect **high quality work from senior management staff**. We don't use interns and other junior level staff to conduct most of the analysis and then merely rubber stamp the deliverables.
- We have completed a vast array of BID planning efforts and economic development strategies that go far beyond research and quantitative analysis—**our strategies serve as detailed blueprints for communities** to realistically consider their assets and opportunities for growth, to exploit their competitive advantages, and to understand the required next steps and responsibilities involved in moving forward.
- Each staff member mobilized for this study has **decades of public engagement experience**. We skillfully conduct public meetings and smaller focus groups; prepare resident surveys; and make presentations to council meetings, neighborhood groups, and downtown development entities.
- We have a **proven track record of identifying a wide range of public and private funding opportunities** to support implementation activities.



Qualifications

Firm Qualifications



Our work for the Downtown Rochester BID will be led by **Civitas Consultants LLC**, formed in 2009 by David Feehan. Dave is a world-recognized expert in downtown revitalization who has worked with over 200 business improvement districts. For nearly a decade he served as president of the International Downtown Association, the worldwide network of BIDs. At Civitas, Dave has provided consulting services to many government agencies and civic organizations and has assessed BID/NID feasibility and assisted in their establishment in Pennsylvania as well as Connecticut, Minnesota, Maryland, Texas, New Jersey, Washington, D.C. and cities in South America, the Caribbean, El Salvador, New Zealand and Taiwan. He helped write BID legislation for the United Kingdom. Civitas will be the primary contact with RDDC.

URBAN PARTNERS

Urban Partners will serve as the lead administrative consultant for this project, responsible for project coordination and the tasks outlined in this proposal. We are a firm that assists public, private, and non-profit clients with the planning and implementation of feasible development and revitalization efforts. Our work includes community-wide plans, district-based strategies, site specific assessments, and cultural/community facility feasibility. We provide sound real estate market analysis to identify the realm of alternatives and detailed fiscal and economic analysis to establish the long-term requirements of project development and sustainable operation that will lead to implementable real-time strategies. Since 1980, our attention to market and economic realities has helped clients to complete an extensive portfolio of revitalization and development projects.

We are also pleased to team with Michael Weiss of **Civic Ventures**, and Pat DiGiovanni of **Glass House Consultants**, both nationally recognized consultants in BID planning and creation. In addition to directing a BID in Brooklyn, NY, Mike has been instrumental in the formation of several BIDs in New York City as well as the founder and board member of several related non-profit organizations. Pat is a recently retired Executive of Centro San Antonio. He was the organization's CEO and oversaw the downtown Public Improvement District as well as the Downtown Alliance, a sister member organization. Prior to his tenure with Centro, Pat was the Deputy City Manager for the City of San Antonio.

Following is a more detailed firm description of Civitas and Urban Partners.

Civitas Consultants LLC

David M. Feehan
President

Summary

Civitas Consultants LLC is a Maryland-based consulting corporation formed in 2009 by David Feehan, a world-recognized expert in downtown revitalization. For more than forty years, Feehan has provided leadership and management to successful downtown and business district organizations, founded and directed a technical assistance center for community development organizations and a public policy organization, authored numerous books and articles, and taught at two universities. He is often quoted by news media throughout North America and elsewhere. He is a frequent speaker at conferences and meetings, recently speaking in Turin, Quebec, and Taipei, and has provided consulting services to many government agencies, organizations and associations. He has served on numerous boards of directors, and has chaired the boards of the International Downtown Association, the Responsible Hospitality Institute, Preserve Historic Dinkytown, and other organizations.

As the chief executive of three downtown organizations and one community development corporation, Feehan managed major real estate and infrastructure projects, successful business attraction and retention programs, and an award-winning parking system.

As the chief executive of two technical assistance centers, he provided organizational development, marketing, fundraising and other management support to more than 500 nonprofit organizations.

As a consultant, Feehan has helped downtown and business district organizations as well as units of government develop visions and missions, strategic plans, innovative programs, and transformational processes.

As an author and professor, he co-edited and wrote the most recognized textbook on downtown management, *Making Business Districts Work*, and is a frequent writer for journals and trade publications.

Management and Leadership

2001 – 2009	President and CEO -- International Downtown Association, Washington DC
1996 – 2001	President and CEO – Downtown Community Alliance, Des Moines, IA
1994 – 1996	Executive Director, Downtown and Community Development – Detroit Renaissance, Detroit, MI
1989 – 1994	President and CEO – Downtown Kalamazoo, Inc., Kalamazoo MI
1988 – 1989	Executive Director – Citizens League of Southwestern PA, Pittsburgh, PA
1982 – 1988	Executive Director – East Liberty Development, Inc., Pittsburgh, PA
1980 – 1982	Executive Director – Community Technical Assistance Center, Pittsburgh, PA

1973 – 1979 Executive Director – Minneapolis Communications Center, Minneapolis, MN

Consulting Experience

Selected examples as a private consultant:

- Montgomery County MD Pike District – Forming a Business Improvement District
- St. Paul MN – Organizational strategy for forming a BID
- Columbia MD – Serving as interim executive director for Downtown Partnership
- Pittsburgh PA – Funding strategy and serving as interim executive director for a community development corporation
- San Antonio TX – Transformation/restructuring of downtown revitalization program
- Pittsburgh PA – Strategic plan for South Side Community Council
- Columbia MD – Funding and program development strategy
- Moorhead MN – Concept framework and organizational development for new downtown organization
- Pittsburgh PA – Major fundraising strategy for crime reduction/affordable housing program
- Lebanon PA – Creation of a business improvement district
- Souderton PA – Creation of a business improvement district
- Pittsburgh PA – Board training and development, management consulting for a senior residence
- Provo UT – Parking advisory panel
- Washington DC – Strategic plan and board retreat for Golden Triangle BID
- Pittsburgh PA – Multi-neighborhood NID creation strategy
- Pittsburgh PA – Organization restructuring of Community Technical Assistance Center
- Billings MT – Expert Advisory Panel on city parking system
- San Antonio TX – Assessment of support for restructuring municipal parking system
- Pittsburgh PA – Assisting senior service center with dissolution
- San Salvador, El Salvador – Creation of a Business Improvement District
- Winnipeg, Manitoba – Downtown parking system assessment
- Pittsburgh PA – Assessment of CDCs/Development of NID funding toolkit
- Nassau, Bahamas – Creation of a new Business Improvement District
- Grinnell, IA – Development of a new vision for downtown
- Fargo, ND – Creation of a new downtown organization
- Queens, NY – Acquisition of City-owned parking facilities by CDC
- Las Vegas, NV – Strategic planning for downtown parking

Selected examples as IDA President facilitating Advisory Panels

- Austin TX – Retail strategic plan
- Boise ID – Parking and downtown vision
- Brooklyn NY – Retail strategy and organizational development
- Charlotte NC – Parking strategy and management program
- Cleveland OH – Creation of a Business Improvement District
- Colorado Springs CO – Downtown development strategy
- Collierville TN – Downtown vision and strategy
- Council Bluffs IA – Creation of new downtown organization
- Duluth MN – Funding strategy and implementation of a BID
- Fort Wayne IN – Downtown organization restructuring
- Lake Charles LA – Downtown vision and strategy
- Lincoln NE – Transforming downtown parking program
- Long Beach CA – Transforming downtown parking program
- Omaha NE – Creation of a BID
- Parkersburg WV – Siting and integration of new GSA facility
- Providence RI – Restructuring downtown parking program
- Seattle WA – Metro-wide transportation management strategy
- Spokane WA – Customer service plan for downtown parking
- Toledo OH – Integration of new federal facility into downtown plan
- Washington DC – Best practices strategy for program improvement
- Wheaton MD – Integrating new public facilities into master plan

- Windsor ON – Reorganizing and expanding BID
- Yakima WA – Organization and marketing strategy

Recognition

- Lee Kuan Yew WorldCity Prize nominee 2010
- University of Pittsburgh Distinguished Alumni Award 2008
- University of Pittsburgh– Distinguished Service Award (Pittsburgh)
- International Downtown Association – Major Projects Task Force (Des Moines)
- International Parking Institute – Award of Excellence (Kalamazoo)
- International Downtown Association – Arcadia Creek Project (Kalamazoo)
- International Downtown Association – Downtown Parking System (Kalamazoo)

Contact Information

- 1626 White Oak Vista Drive, Silver Spring MD 20904 * 202.288.0528 * civitas.dave@me.com

URBAN PARTNERS

COMMUNITY & ECONOMIC DEVELOPMENT

Philadelphia, PA + Charleston, SC

Urban Partners is a national community and economic development consulting firm that assists public, private, and non-profit clients plan and implement feasible development and revitalization efforts. Since 1980, our attention to market and economic realities has helped clients complete an extensive portfolio of revitalization and development projects. Our work includes community-wide plans, district-based strategies, site specific assessments, and cultural/community facility feasibility. We provide sound real estate market analysis to identify the realm of alternatives and detailed fiscal/economic analysis to establish the long-term requirements of project development and sustainable operation.



Downtown & Commercial District Revitalization

We develop overall revitalization strategies for entire downtowns and commercial districts, create site-specific economic development strategies, and assist in the implementation of our recommendations. Our experience involves retail, office, residential, entertainment, lodging and cultural activities - as well as supportive uses such as parking, circulation, infrastructure, and streetscape.



Market Research/Feasibility Analysis

We create specialized economic development strategies for projects having complex development needs, including military bases, hospital complexes, and properties with significant environmental remediation needs. We undertake comprehensive studies, recommend viable development alternatives, identify economic/fiscal impacts of development schemes, and assist in securing developers and project financing.



Community Planning & Municipal Assistance

We have a strong commitment to working with community development corporations, public agencies, and institutional partners on neighborhood revitalization issues. We create community master plans, identify specific projects, perform market and financial feasibility analysis, and structure the creative and workable financing strategies necessary to move complex urban development projects from conception to completion.



Housing Market Analysis & Strategy

We prepare detailed analyses of housing markets that include supply and demand analysis, forecasting of future housing needs, incentive programs to provide unmet demand, and affordable housing needs analysis. Our work usually involves the engagement of community stakeholders in formulating housing priorities. We also assist specific housing developments in identifying target markets and planning production strategies.



Cultural Heritage Economics

We assist cultural institutions, heritage areas, and recreational facilities in planning, financing, and implementing development projects and supportive programmatic activities that serve their mission and contribute to the tourism economy. We conduct economic impact analyses of cultural tourism activities that demonstrate the far-reaching impact of special exhibitions, festivals, and permanent arts, heritage and recreational programming on a region.



Smart Growth/Regional Planning

We are very active in transit-oriented development projects, cooperative regional planning efforts, and other smart growth initiatives that concentrate development in established urban areas, minimize sprawl development, and protect open space resources. Our services include policy tools such as transfer of development rights and other programs that facilitate implementation of sustainable development activities.

Staff Roles and Qualifications

For this project, we are assigning five staff members from the participating firms with the following roles:

- **David Feehan, Civitas Consultants, LLC**
Dave will be the lead consultant and initial primary contact with RDDC. In this role, Dave will ensure that all necessary steps for BID formation will be followed. He will identify case studies, lead the outreach and communication strategy, and work with the BID Formation Committee.
- **Christopher Lankenau, AICP, Urban Partners**
Chris, a Southern Tier native, will be the project manager and administrative contact, ensuring that the project remains on schedule and budget. Chris will manage the district ratepayer database and prepare the BID Plan. He will be a participant in the outreach process and will be the on-the-ground member of the team.
- **James Hartling, Urban Partners**
Jim will lend his technical expertise to the process ensuring that prospective assessment formulas, fees, and district boundaries are vetted.
- **Mike Weiss, Civic Ventures**
Mike will serve as the New York State BID expert, ensuring that the process for Downtown Rochester adheres to state law, particularly during the legislative process. Mike will work with the BID Formation Committee to enlist their input and involvement as necessary.
- **Pat DiGiovanni, Glass House Consultants**
Pat will lend his experience as an executive of a fellow river city and will provide input to the BID Formation Committee. Pat will also manage the needs-assessment survey and conduct any necessary outreach with city officials.

Detailed resumes for each participating staff person can be found on the following pages.

1626 White Oak Vista Dr.
Silver Spring MD 20904
202.288.0528
civitas.dave@me.com

DAVID M. FEEHAN

Experience

2009 – Present President – Civitas Consultants, LLC
Accomplishments (Consulting):

- Urban Revopement Authority of Pittsburgh (assessment of eight Mainstreets programs for potential NIDs and creation of an on-line NID Toolkit; retail study for South Side community)
- City of Lebanon PA (organizing downtown supporters in collaboration with the City of Lebanon to create a Business Improvement District)
- Souderton PA Main Street Program (advising a successful campaign to create a Business Improvement District)
- Fargo Moorhead Area Foundation (developing a concept for a new downtown in conjunction with two universities and creating a new downtown management organization)
- Downtown Columbia MD Partnership (developing a funding plan for a new downtown organization)
- City of Provo UT (parking advisory panel)
- Bloomfield Development Corporation, Pittsburgh PA (managed the Little Italy community CDC for one year, secured \$700,000 in funding commitments)
- City of San Antonio and San Antonio Centro Partnership (restructuring the city's downtown organization, creating and facilitating an expert panel on streetcar route, facilitated staff and board retreats)
- Pittsburgh Partnership for Neighborhood Development (assistance to CDCs seeking to create NIDs)
- City of Houston (parking advisory panel)
- Pittsburgh's Bloomfield Development Corporation (restructured management, developed major programs, secured \$700,000 in new funding)
- Minneapolis/St. Paul Great Cities Coalition (helping CDCs form BIDs)
- Baltimore Midtown Community Benefits District (resolving organizational issues and conducting a board retreat)
- City of Fort Collins CO (parking advisory panel)
- Trenton Community Foundation (advising on BID and other downtown issues)
- Center City Development Office, City of San Antonio (staff retreat)
- Downtown Kalamazoo Incorporated (developing a strategy for moving from a development organization to a business district management organization)
- Golden Triangle BID in Washington DC (strategic plan and board retreat)
- Downtown Nassau (Bahamas) Partnership (creating a BID and development organization)
- Greater Downtown Council, Duluth MN (parking advisory panel and board retreat)
- Pittsburgh Downtown Partnership (advisory panels on parking, housing and planning for G-20 Summit)
- Bridgeport CT Downtown Special Services District (strategic plan)
- Johnson City TN Development Authority (assessing infrastructure opportunities)

- San Salvador Zona Rosa Corporacion (creating the first BID in Central America)
- Winnipeg MB Parking Authority (organizational development)
- Cedar Rapids IA Downtown Partnership (management of the municipal parking system)
- City of Maringa Brazil (exploring possibilities of a BID)
- International Downtown Association (conference and technical assistance management)
- Drexel University (training session on fundraising for CDCs)
- City of Auckland, New Zealand (BID creation)
- Regional Governments in Northern Taiwan (creation of BIDs)

2001 – 2009

President and CEO -- International Downtown Association, Washington DC

Accomplishments (Full time Employee):

- Increased membership by fifty percent in seven years.
- Set conference attendance records, including the largest conference in IDA history, the 2007 World Congress in New York.
- Secured more than \$500,000 in new technical assistance revenues.
- Created/authored new publications (*Making Business Districts Work* and *ABCs for Creating BIDs*); e-bulletin (*IDA Dialogue*).
- Expanded collaborative relationships with federal agencies, international associations, and industry groups
- Conducted more than 40 IDA Advisory Panels, board retreats and staff retreats in downtowns throughout the US, Canada and the Caribbean, including advisory panels in Spokane, Pittsburgh, Washington DC, Boise, Long Beach, Seattle, Council Bluffs, Tulsa, San Antonio, Boise, Fresno, Duluth, and Tucson; and board retreats in Pittsburgh, Mobile, Little Rock, and Albany.
- Increased revenues by more than 100 percent over seven years.

1996 – 2001

President and CEO – Downtown Community Alliance, Des Moines, IA

Accomplishments:

- Designed, created, and implemented a Business Improvement District. Through this program, quality of life crimes in the central business district were reduced by 30 to 70 percent, while employing a number of minority, low income, handicapped, and homeless people
- Staffed and managed an award-winning process to prioritize nearly \$1 billion in major project proposals, including a \$400 million enclosed rain forest, a new event center, downtown library, science center, and a world food and fiber institute. All of these projects, with the exception of the rain forest, are completed.
- Initiated, designed, developed several festivals and events, increasing visits to downtown by more than a million people a year, including an arts festival that ranked as high as third in the nation and a farmers market named one of the top five in the US by Bon Appetit magazine.
- Co-chaired the city's homelessness task force, which resulted in major changes in services to homeless individuals
- Established a formal relationship with the city's coalition of neighborhood organizations, reducing tension and increasing cooperation between these groups and the downtown organization
- At the request of seventeen area mayors, created and carried out the metro area's millennium celebration. Through this celebration, established a special fund for innovation in the arts at the Greater Des Moines Foundation

1994 – 1996

Executive Director, Downtown and Community Development – Detroit Renaissance, Detroit, MI
Accomplishments:

- Initiated and managed a \$40 million, 16-acre land acquisition project with financial backing of General Motors, Ford, Chrysler, and other major corporations and foundations, which culminated in the purchase of the former J. L. Hudson's department store and several other downtown properties. This site, called the Campus Martius project, is now redeveloped and provides jobs for thousands of Detroit area residents.
- Created the Greater Downtown Partnership, a new downtown organization that today manages redevelopment and revitalization of the CBD and peripheral areas. This organization coordinated preparations for the recent Super Bowl held in Detroit.
- Worked closely with several community organizations, including the Warren Connor Community Coalition, which had received an Annie Casey Foundation grant to build neighborhood leadership and citizenship.

1989 – 1994

President and CEO – Downtown Kalamazoo, Inc., Kalamazoo MI
Accomplishments:

- Managed the \$120 million Arcadia Creek redevelopment project, rebuilding the northern half of the downtown area. New projects included the Kalamazoo Oncology Center, a major treatment facility and the first joint project of Bronson Methodist Hospital and Borgess Medical Center; a new downtown campus for the Community College; a new science and history museum, renovation of the city's hotel/convention center complex, and a business incubator. This project, funded in part by the Kalamazoo Community Foundation, won international awards.
- Pioneered downtown organization management of the city's parking system, reducing customer complaints by 80 percent, increasing revenues by one-third over a three-year period, and serving as a model for many other downtown organizations.
- Served as a consultant to the Western Michigan University Evaluation Center, assessing MacArthur Foundation grants to Chicago CDCs.

1988 – 1989

Executive Director – Citizens League of Southwestern Pennsylvania, Pittsburgh, PA
Accomplishments:

- Founded and organized a regional civic public policy organization that conducted forums and published reports on riverfront development, regional tax-base sharing, and affordable housing.

1982 – 1988

Executive Director – East Liberty Development, Inc., Pittsburgh, PA
Accomplishments:

- Attracted 200 businesses to a blighted business district creating 2000 jobs. Established a technical assistance program for minority entrepreneurs.
- Secured \$80 million in new real estate investment, including a business incubator linked to Carnegie Mellon University, a new shopping center, condo conversion of a vacant warehouse, and restoration of an historic market house. Implemented a successful campaign to remove a failed pedestrian mall.
- Purchased and renovated historic buildings, including a vacant theater.
- Created a retail outlet store designed to provide low-skilled community residents with job training and career opportunities.
- Secured annual support from the Ford Foundation, Heinz Endowments, Pittsburgh Foundation, Mellon Bank Foundation, R. K. Mellon Foundation and other local foundations.

1980 – 1982

Executive Director – Community Technical Assistance Center, Pittsburgh, PA

Accomplishments:

- Organized and designed a program that assisted more than 50 community-based organizations in areas such as job creation, real estate development, program design, organizational development, and fundraising.

1979 – 1981

Consultant – Midwest Research Institute, Minneapolis, MN

Accomplishments:

- While attending the University of Pittsburgh School of Social Work, co-authored a study funded by the Charles Stewart Mott Foundation analyzing innovative methods of community communication.
- At the same time, while completing the required field placement, organized the Community Technical Assistance Center and helped organize a citywide community education program through the Allegheny Conference on Community Development.

1973 – 1979

Executive Director – Minneapolis Model City Communications Center, Minneapolis, MN

Accomplishments:

- Provided technical assistance to more than 400 nonprofit organizations throughout the Twin Cities and nationwide.
- Established the first computerized nonprofit accounting bureau in the nation through grants from local foundations.
- Through a multi-year grant from the Charles Stewart Mott Foundation, assisted "Stimulating the Neighborhood Action Process" (SNAP) groups in eleven cities from coast to coast.
- Received the "Horizons on Display" Bicentennial award from the US Department of Housing and Urban Development as one of the most innovative projects in the country.

1971 – 1973

Community Contact Coordinator/Grantwriter – Model City Communications Center, Minneapolis, MN

Accomplishments:

- Established successful projects and relationships with several community action and neighborhood development groups in the Model City area, including Harriet Tubman Women's Shelter and the Urban League Street Academy.
- Secured grants from the City of Minneapolis and several local foundations for a number of communications and technical assistance programs.

1969 – 1971

Community Organizer – Pillsbury Waite Neighborhood Services, Minneapolis, MN

Accomplishments:

- Organized the Minneapolis Tenants Council, an effective advocacy organization that secured tenant protection legislation at the state level, and helped protect a neighborhood close to the University of Minnesota from being bulldozed for a high-rise development.

1968 – 1969

VISTA Volunteer – Mon Yough Community Action Committee, McKeesport, PA

- Organized groups in local housing projects to overcome discriminatory practices on the part of the local housing authority. Assisted in editing a local newsletter published by African American community leaders. Initiated a magistrates court observation program in conjunction with Neighborhood Legal Services and the League of Women Voters that resulted in significant changes in court operations.

Teaching

1997 – 2001

Adjunct Professor – University of Iowa School of Social Work
Courses: Organization and Community Practice; Integrated Practice; Human Services Administration; Community Economic Development; Advanced Practicum Seminar

1975-1977

Adjunct Professor -- Metropolitan State University, St. Paul, MN
Courses: Conflict Management, Community Development

Education

University of Pittsburgh School of Social Work – MSW 1981
Metropolitan State University – BA 1977

Honors and Awards

Lee Kuan Yew World City Prize (Nominee and finalist, 2011)
University of Pittsburgh Distinguished Alumni Award
University of Pittsburgh School of Social Work Distinguished Service Award
Pittsburgh Neighborhood Association – Gabor Kish Award
Pittsburgh East End Communities – Man of the Year Award
International Downtown Association – Des Moines Major Projects Task Force
Des Moines CityView Magazine – Person of the Year
Des Moines Business Record – Business Leader of the Year -- 2nd place
International Parking Institute – Award of Excellence (Kalamazoo Parking System)
International Downtown Association – Kalamazoo Arcadia Creek Project
International Downtown Association – Kalamazoo Downtown Parking System
US Department of Housing and Urban Development –Horizons on Display (Minneapolis)

Civic Activities

Chairman, Board of Directors, International Downtown Association
Chairman, Board of Directors, Responsible Hospitality Institute
Chairman, Board of Directors, American School Reform Town Meetings, Inc.
Treasurer, Board of Directors, Des Moines Arts Festival
Member, Board of Directors, Civic Center of Greater Des Moines
Co-Chair, Polk County Homelessness Task Force
Founding Member, Board of Directors, National Nonprofit Management Association
Member, National Business Incubator Association
Board of Directors, Pittsburgh Neighborhood Alliance
Member, Inaugural Class, Leadership Pittsburgh
Board of Directors, Pittsburgh Salvation Army
Member, Mayor's Commission on Women in Renaissance II, Pittsburgh
Board of Directors, Unity Settlement Foundation (Minneapolis)

Christopher Lankenau, AICP

Principal



EDUCATION

University of Vermont

Bachelor's in Geography

Michigan State University

Master's in Urban and Regional Planning

MEMBERSHIPS & AFFILIATIONS

American Planning Association

American Institute of Certified Planners (AICP)

Fairmount Community Development Corporation - Vice President, Board of Directors

CONTACT INFORMATION

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clankenau@urbanpartners.us

<http://www.urbanpartners.us>

Christopher Lankenau, AICP, is a planner and economic development consultant with 25 years of professional experience. Since joining Urban Partners in 2006, Chris has managed a variety of projects ranging in scale from single sites to large master plans on behalf of municipalities, community development corporations, and non-profit organizations in several states. His current work focuses on community revitalization and economic development in both commercial and residential areas, including real estate market analysis, demographic analysis, and fiscal impact analysis, as well as economic feasibility analysis for adaptive use and new development projects. Chris also has experience in community outreach, transportation planning, and land use planning.

Prior to joining Urban Partners, Chris was a Senior Associate at the Pennsylvania Economy League, where he focused on community revitalization in Southeastern Pennsylvania's older core communities. Chris also has significant planning experience as a consultant with the Philadelphia firm of Kise Straw & Kolodner (now KSK Architects, Planners and Historians), where he managed a variety of planning projects with a particular focus on commercial district and community revitalization. Previously, Chris also held staff positions with county planning agencies, serving as planner for the Montgomery County Planning Commission (PA), as well as the Maryland National Capital Park and Planning Commission.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Commercial District/Downtown Revitalization

- North Broad Business Improvement District (Philadelphia, PA)
- Souderton Business Improvement District Feasibility Plan (Souderton, PA)
- Broad & Erie Transportation and Community Development Plan (Philadelphia, PA)
- Downtown Boyertown Vision & Action Strategy (Boyertown, PA)
- Downtown Glassboro Arts and Entertainment District Plan (Glassboro, NJ)
- Brownsville Road Commercial Node Development Strategy (Pittsburgh, PA)
- East End Market-Based Economic Development Strategy (Pittsburgh, PA)
- Hagerstown City Center Plan (Hagerstown, MD)
- Martinsburg Mills & Rail Corridor Revitalization Initiative (Martinsburg, WV)
- Downtown Etna Commercial Revitalization Analysis (Etna, PA)
- Englewood Downtown Master Plan (Englewood, NJ)

James E. Hartling

Partner



EDUCATION

Princeton University

Bachelor's in Mathematics

University of California at Berkeley

Master's in Planning

MEMBERSHIPS & AFFILIATIONS

Entrepreneurworks - Chairman,
Board of Directors

Local Initiatives Support
Coalition (LISC) Philadelphia -
Advisory Board

Community Design
Collaborative, Advisory Board

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James Hartling has served as partner-in-charge for most of Urban Partners' economic development projects and has been responsible for examining the market feasibility of many large-scale development and redevelopment projects since the firm's inception in 1980. He has directed the firm's downtown revitalization efforts in numerous cities in the mid-Atlantic and East Coast, and has prepared and helped implement neighborhood housing and commercial revitalization strategies in both large cities and smaller communities. Additionally, he has directed the firm's work involving the planning and development of new village centers and transit-oriented developments, as well as significant participation in the establishment of transfer of development rights programs (TDR) in New Jersey and Pennsylvania. He has also completed numerous studies documenting the regional tax and employment impacts of major cultural institutions.

Mr. Hartling had over ten years of experience as an economic and social planner prior to founding Urban Partners. From 1977 to 1980, he administered \$15 million annually of CDBG and EDA funds as Deputy Director for Economic Development of Philadelphia's Community Development program. Previously, Mr. Hartling was on the faculty of the University of Texas teaching in both the graduate planning and public affairs programs. There he conducted research and training projects on economic and community development and human services delivery. He has also held staff positions with planning and development agencies in Texas, California, and New Jersey.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Commercial District Revitalization

- Reading Strategic Econ. Dev. Initiative (Reading, PA)
- Allentown Arts District Master Plan (Allentown, PA)
- Englewood Downtown Master Plan (Englewood, NJ)
- Downtown Savannah Master Plan (Savannah, GA)
- Arts & Entertainment District Plan (Glassboro, NJ)
- Bridging the Busway Transit-Based Plan (Pittsburgh, PA)
- Downtown Etna Commercial Revitalization Analysis (Etna, PA)
- Swarthmore Town Center Revit. Strategy (Swarthmore, PA)
- Montclair Town Center Development Strategy (Montclair, NJ)

Organizational/Strategic Planning

- PA Parks Maintenance Institute (Statewide PA)
- Evaluation of Community Development Corps. (Phila., PA)
- Greater Germantown Housing Development Corp. (Phila., PA)
- Habitat for Humanity Philadelphia Strategic Plan
- Preservation Alliance for Greater Philadelphia Strategic Plan

RESUME

Michael A. Weiss
15 Waldorf Court
Brooklyn, NY 11230

Email: m.a.weiss@verizon.net

(H) 718 434-8430

(mobile) 646 739-5391

Work History

June, 2015 – Present **Treasurer, Myrtle Avenue (Brooklyn) District Management Association, Inc.**

September, 2011 – Present **Consultant** operating under own company name as Civic Ventures Co.
Strategic & Urban Planning, Intergovernmental & public affairs, lobbying, not-for profit management

January, 1996 – September, 2011 **Executive Director, MetroTech Business Improvement District**
Responsible for overall administration and management of \$2.6 million+ budget of non-profit business support organization.

January, 1987 – December, 1995, **Chief of Staff and Chief Administrative Officer, NYC Department of Transportation**

Managed agency budget (\$2 billion/ year) and personnel divisions of very large City agency (8,000 employees). Supervised Community and Intergovernmental Affairs Unit, Press, Communications Offices, Agency Inspector Generals' Office, Vehicle Maintenance and Repair (3,500 vehicles – 5 repair garages and 100 auto mechanics). Managed Special Projects such as first Red Light Camera procurement and installation in NYC.

September, 1961 – December, 1986, **Teacher of Physics, High School Guidance Counselor and Assistant Principal, Brooklyn Technical High School, Brooklyn, NY**

Community and Non-Profit Activity

Founder, Flatbush Development Corp, non-profit community development corporation (1975)

Member and Vice-Chair, Brooklyn Community Board #14 (1975 – 1985)

Founder, Brooklyn Technical HS Alumni Association (current Board member)

Past Chair, International Downtown Association

Past Chair, NYC BID Managers Association

Founder and Treasurer, Brooklyn Golf Alliance Inc (not-for-profit)

Education

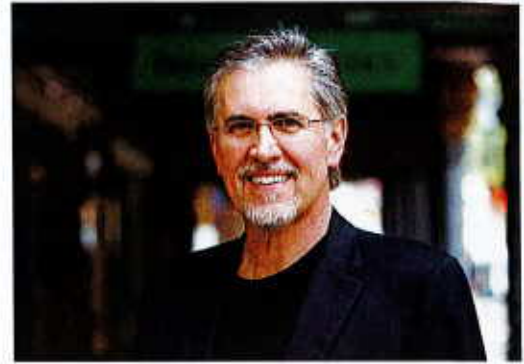
B.S., Physics - Brooklyn College

M.S. Educational Psychology, Yeshiva University

Coursework in Educational Administration, Business Process Reengineering, attended many conferences and seminars in Strategic Planning, Downtown Management and Development

Pat DiGiovanni Bio

Pat DiGiovanni is a retired President and CEO of Centro San Antonio; a 501(C)3 corporation created and focused on a vibrant and prosperous downtown that benefits the entire San Antonio community. Centro also managed the downtown Public Improvement District(PID). Previously, Pat served the community as Deputy City Manager of the City of San Antonio. In addition, he has held several executive positions over his 35 year career including City Manager of Kalamazoo, Michigan.



In his 5 years as Centro's CEO, Pat established Centro as a key partner with the public and private sector. He led the restructuring and rebranding of Centro, developed a long range plan for the organization, and collaborated with the board on a number of initiatives to partner with the City, County and other key public sector entities.

Pat has led the creation of the Zona Cultural, a state-designated cultural district, design of a retail strategy for the Houston Street corridor, investment in the transformation of Travis Park, and the launch of several free community events to activate public spaces in downtown. Pat also spearheaded the creation of a new downtown brand, which launched in the Fall of 2015.

In 2016, Centro led and facilitated its partnership with private sector stakeholders on the Broadway Cultural Corridor and Zona Cultural conceptual design projects. These transformational projects, along with Hemisfair Civic Park, were approved by citizens in the City's 2017 bond program, and will bring over \$150M of public investment to downtown San Antonio.

As Deputy City Manager, Pat had management oversight at one time or another of nearly every City department. He oversaw key code revisions to support the City's "No Kill" animal care goal, implemented a non-profit model for golf operations, and facilitated efforts to help secure vital military missions in San Antonio as well as the protection of two endangered species. DiGiovanni negotiated countless real estate and economic transactions that positioned the city for growth, and development agreements that brought hundreds of jobs to the urban core. He led the "Housing First" strategy and policy development that produced over 10,000 new housing starts in the center city during Mayor Castro's "Decade of Downtown". He was a key member of the Riverwalk extension and redevelopment team and he led the downtown development team that created new housing starts along the north and south river extensions.

In 2019, Pat started Glass House Consulting, LLC to advise and assist Executive and Board leadership in challenging times through strategy and organizational development. Pat recently led a team of consultants on the Sioux Falls downtown Business Improvement District renewal plan.

Pat currently serves on the Board of the San Antonio Independent School District Foundation where he is Chair of the Governance Committee and a member of the Executive Committee. Pat also serves on the Urban Land Institute Local Council and leads the Urban Development Committee.

Pat's wife, Alicia, works for the Marriott Rivercenter and Marriott Riverwalk properties in San Antonio. He has three children, Anne, an attorney in Los Angeles, and twin sons, David and Paul who are independent workers in web development and marketing.

Relevant Projects & References

Currently, the Civitas/Urban Partners team is completing the North Broad Renaissance BID project in Philadelphia and Civitas is completing the Downtown Sioux Falls BID plan with Glass House Consulting. Prior to these efforts, the most recent BID formation projects completed by the team are:

- Downtown Lebanon BID – Lebanon, PA
- Souderton BID – Souderton, PA
- Downtown Columbia Partnership BID – Columbia, MD

Below is a list of references for projects completed by Civitas and Urban Partners. The qualification sheets on the following pages describe the services rendered by the team for various relevant projects.

1. **Sherry Capello**, Mayor
City of Lebanon
Lebanon, PA
(717) 821-1054
scapello@lebanonpa.com
2. **Joanne Coppens**, Manager
Souderton Telford Main Streets
Souderton, PA
(215) 723-6627
joanne@stmainst.org
3. **Kristi Stokes**, President
Greater Downtown Council
Duluth, MN
(218) 727-8549
kstokes@downtownduluth.com
4. **Leona Agouridis**, Executive Director
Golden Triangle BID
Washington, DC
(202) 463-3400
kstokes@downtownduluth.com
5. **Josette Fitzgibbons**, Main Street/Elm Streets Manager
Urban Redevelopment Authority of Pittsburgh
Pittsburgh, PA
(412) 255-6686
jfitzgibbons@ura.org



Project Profile:

North Broad Business Improvement District Plan

Location:
Philadelphia, PA

Client:
North Broad Renaissance

Collaborators:
Baker & Company, LLC
Civitas Consultants LLC

Completion Date:
2020

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The North Broad Renaissance (NBR), is a non-profit organization whose primary role, in partnership with community stakeholders, is to revitalize the community, create opportunities for businesses and residents, and improve the economic power and overall quality of life along North Broad Street from City Hall to Germantown Avenue. To enhance and sustain the services it provides, NBR pursued the potential to create a business improvement district (BID) along the North Broad Street corridor.

A BID is a formal entity that allows property and business owners to come together to make a collective contribution to the improvement of their commercial district. BIDs deliver a range of services over-and-above normal City services and invest in the long-term economic development of their districts. Funds for BID programs and services are generated from a special assessment paid by the benefited property owners directly to the organization that manages the BID's activities.

To explore a BID for North Broad, NBR retained a team led by Urban Partners to conduct community outreach, lend expertise to the BID formation process, and prepare the BID plan. The Plan outlined all required elements of the Act for establishing a BID, including identifying district boundaries, eligible properties, proposed services, revenue sources, and organizational structure. Due to the economic challenges faced by area small businesses as a result of the COVID-19 pandemic, City Council decided to postpone the BID formation process in 2020.

Key services performed

- Property Assessment Research
- Business Plan Creation
- Stakeholder Engagement
- Public Presentation

Project Profile:

Souderton Business Improvement District Plan

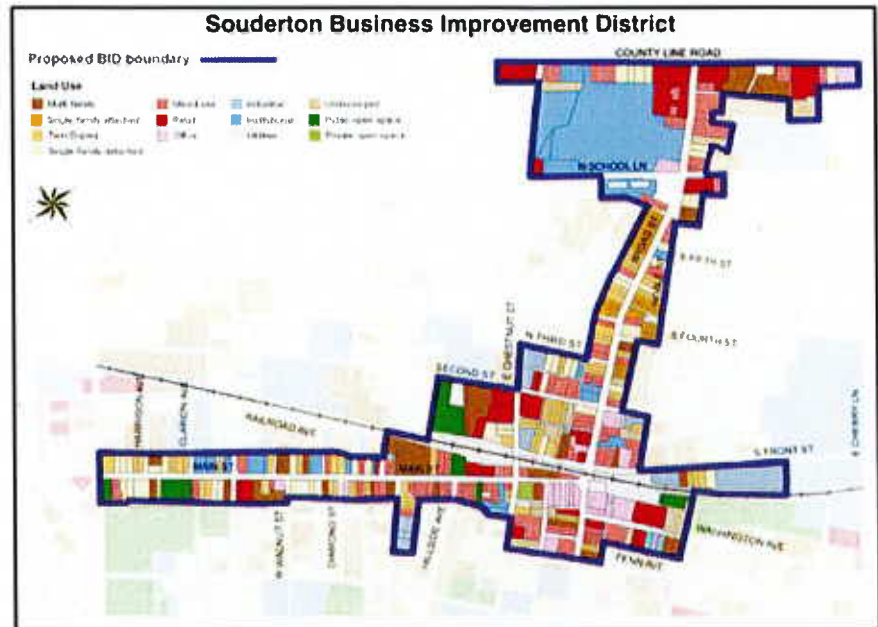
Location:
Souderton, PA

Client:
Souderton Telford Main Streets,
Borough of Souderton

Collaborators:
Civitas Consulting,
Carter Van Dyke Associates

Completion Date:
2014

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The Borough of Souderton and Souderton Telford Main Streets hired Urban Partners to examine the potential to create a Business Improvement District (BID) in Souderton. A BID is a specific geographic area consisting of a group of property and business owners that cooperate financially to provide mutually-beneficial services throughout the defined area. Recognizing that municipal revenues are often insufficient to provide various desired services, the General Assembly of the Commonwealth of Pennsylvania created the Neighborhood Improvement District Act of 2000, authorizing municipalities to create BIDs.

Working with Souderton Telford Main Streets, Urban Partners created a business plan for the Souderton BID enlisting feedback from owners of commercial properties located in Souderton. The plan outlined all required elements of the Act for establishing a BID, including district boundaries, eligible properties, proposed services, revenue sources, and organizational structure.

Pursuant to the Act, for a BID to be created, at least 40% of the property owners within the BID district proposed in the final plan must file objections to the BID plan. No objections were filed, and the Souderton BID successfully took effect in 2015.

Key services performed

- Property Assessment Research
- Business Planning
- Stakeholder Engagement
- Public Presentation

Project Profile:

Boyertown Vision & Action Strategy

Location:

Boyertown, PA

Client:

Building a Better Boyertown

Collaborators:

Barton Partners,
Downtown Dynamics

Completion Date:

2017

Building a Better Boyertown (BBB), Boyertown's Main Street and community development corporation, retained a multi-disciplinary professional planning team to prepare a community visioning and implementation plan for downtown Boyertown. While BBB's revitalization efforts have resulted in the implementation of several successful projects, the announced closure of National Penn Bank's former headquarters in downtown Boyertown presents a challenge to the economy of the Borough and surrounding area. This plan will provide BBB with a roadmap and guiding vision and offers specific implementation recommendations for improving downtown Boyertown and strengthening the local economy.

As part of this effort, Urban Partners conducted a real estate market assessment for downtown Boyertown, including retail, office, and rental housing. This analysis identified the range of feasible uses that could potentially support a more active mixed-use environment in the downtown area. Using the market analysis as a guide, Urban Partners assessed various development alternatives to identify their financial feasibility. Urban Partners also assessed financing resources available to facilitate the preferred development approach.

Key services performed

- Real Estate Market Analysis
- Financial Feasibility Analysis
- Site Planning
- Stakeholder Engagement
- Public Presentation

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Project Profile:

Downtown Etna Commercial Revitalization Strategy

Location:
Etna, PA

Client:
Borough of Etna

Collaborators:
Environmental Planning and
Design

Project Completion:
2018

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Etna is a borough on the Allegheny River across from the City of Pittsburgh. It was named after the volcano Mount Etna, a reference to blast furnaces and steel mills once located there. As the community works to improve its economy, it has undertaken a multi-faceted effort to revitalize its downtown. This has involved strategies for improving specific blighted properties.

The Borough retained Urban Partners to assist with the revitalization planning in the downtown area. This effort focused on rehabilitating properties with vacant and underutilized ground-floor commercial spaces along Etna's primary downtown corridor – Butler Street. Of particular focus was the 323-399 block.

Our work for this project included an evaluation of property characteristics on the block - both physical and economic - including ground floor uses, recent sales, current rents and property ownership. In addition, a retail market assessment was conducted to understand the demand and opportunities for commercial ground-floor uses appropriate for the downtown. We identified approximately 60,000 square feet of retail opportunity, especially restaurants.

Subsequent to that analysis, Urban Partners provided the Borough with a revitalization 'game plan' focusing on priority nodes of Butler Street and engaged key property owners in advancing that vision.

Key services performed

- Real Estate Market Analysis
- Stakeholder Engagement
- Implementation Strategies

Project Profile:

The Community's City Center Plan

Location:
Hagerstown, MD

Client:
City of Hagerstown

Collaborators:
NV5

Completion Date:
2014

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To assist with implementing the 2012 Sustainable Community Plan, the City of Hagerstown retained Urban Partners to undertake an economic analysis of the Downtown and to identify eight catalytic initiatives to generate momentum and investment. The identification and fine-tuning of these initiatives came as the result of broad community engagement with the Urban Partners team spending more than 130 hours collecting input and feedback through a variety of focus groups, interviews, and community workshops. These catalytic initiatives constitute The Community's City Center Plan.

The eight Catalytic Initiatives include office development, expansion of the Maryland Theatre, support for expansion of the University System of Maryland branch, a hotel/conference center and commemorative park, new and rehabbed housing centered on a new trail, expansion of downtown arts programming, expanded operations of the downtown farmers market, and expanded home ownership strategies. Within ten years, these eight initiatives are projected to result in: 463,000 SF of new development; annual increase of 60,000 Downtown audiences to performance venues; creation of 875 new full-time equivalent jobs; development of 178 new or rehabilitated housing units; and increase of more than \$1.8 million in City and County governments tax revenues annually.

Key services performed

- Downtown Revitalization
- Economic Development Assessment
- Implementation Strategy
- Stakeholder Engagement
- Public Presentation



Scope of Work

Our team's methodology for establishing the Downtown Rochester Business Improvement District is outlined below in a scope of services proposed in accordance with *NY General Municipal Law (GMU), Chapter 24, Article 19-A, Business Improvement Districts*.

Phase 1: Organizing & Information Gathering

■ Task 1.1: Project Kick-Off Meeting (Meeting #1)

Following Rochester City Council's authorization to prepare a BID district plan, the Urban Partners/Civitas team will begin the project by meeting with Rochester Downtown Development Corporation (RDDC) staff and the Rochester Downtown Partnership's (RDP) BID Formation Committee created to support the planning process. This first meeting will provide us the opportunity to clarify our project approach, potentially revise the scope of services to meet specific staff and BID Committee concerns, and to obtain input about the study area and project objectives. We will discuss the role that the BID Committee will play in the study and confirm meeting and decision-making points required throughout the process. We will also identify a roster of stakeholders to be interviewed by the Urban Partners team early in the process—potentially consisting of representatives from RDP.

■ Task 1.2: Downtown Rochester Field Visit

While in Rochester for the project kick-off meeting, members of the Urban Partners/Civitas team will tour the potential BID area to understand the physical features and economic conditions of the district including its business composition, any vacancies, street and sidewalk conditions, and public spaces. The tour could be conducted with members of the RDDC staff and BID Formation Committee.

■ Task 1.3: Review of Existing Documents

The Urban Partners/Civitas team will obtain and review any available economic development plans and documents pertinent to this study to gain a complete understanding of past, recent, and current initiatives and policies related to a BID formation in Downtown Rochester.

■ Task 1.4: Relevant Case Studies

The Urban Partners/Civitas team will compare Downtown Rochester to other similar cities with BIDs through the creation of case studies. These case studies for peer cities will identify numbers and types of properties included in the BID, services provided, operating budgets, and management structures. This exercise will allow the team to understand best practices and

successful models employed by other BIDs that can be applied to Downtown Rochester's efforts. One-page summaries will be prepared for each peer city.

Task 1.5: Tentative BID Boundary Definition

With input from RDDC staff and the BID Formation Committee, the Urban Partners/Civitas team will define a preliminary boundary for the Downtown Rochester BID. While this may change during the planning process, it establishes a baseline for properties to include in the district. A map will be produced delineating the tentative BID boundary.

Task 1.6: Database of District Property Owners and Tenants

Based on the tentative BID boundary, the Urban Partners/Civitas team will develop and manage an Excel database of property owners and commercial tenants within the proposed BID district using data acquired from the City of Rochester Assessor's Office. The database will include such information as property addresses, owner mailing addresses, property type and use, square footage, and assessed values. We will work with RDDC staff to acquire contact information (email address and phone number) for all owners and tenants within the district where possible.

Task 1.7: Review of BID Boundary and Database (Meeting #2)

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formation Committee to review the tentative district boundary as well as discuss the potential composition of the BID based on the database of owners and tenants. We will identify any necessary revisions and refinements to the boundary.

Task 1.8: Engagement of Key Stakeholders

The Urban Partners/Civitas team will interview the key stakeholders identified in Task 1.1 individually by phone or video technology. We will collect candid feedback around issues and opportunities related to the BID, specifically querying interviewees on the value of potential services, any services or activities that are perceived as missing, and where there are potential collaborative opportunities.

Task 2.1: Needs-Assessment Survey

With feedback from RDDC staff and the BID Formation Committee, the Urban Partners/Civitas team will prepare a needs-assessment survey to be distributed to each property owner and commercial tenant in the proposed BID district. The survey will be a vehicle for initial outreach to owners and tenants—a means for introducing the BID concept to the Downtown Rochester community and getting preliminary feedback. We will distribute a link to an on-line survey tool via email. If necessary, RDDC staff will assist with distributing surveys in-person to any business owners that may not have

online access. We will collect, tabulate, and evaluate survey results. Findings will help determine suggested services and improvements outlined in the forthcoming BID Plan.

■ Task 2.2: Review of Needs-Assessment Survey (Meeting #3)

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formation Committee to review the needs-assessment survey results. Based on the combined feedback from the survey and key stakeholder interviews, we will discuss a list of potential services to be provided by the Downtown Rochester BID as well as budgetary needs required to fund those services. Services could include cleaning, safety, maintenance, greening, business attraction and retention, and personnel/administration, among others. Considering the potential budget, the Committee will assist the team with formulating an assessment rate or other fee collection methodology.

■ Task 2.3: Alternative BID Models

Considering the potential budget, the Urban Partners/Civitas team will create and test different assessment formulas and BID boundaries to achieve the budget necessary to support the services provided by the Downtown Rochester BID. We will work with RDDC staff and the BID Formation Committee to reach an acceptable and sustainable model.

■ Task 2.4: Preliminary BID Plan

Using the information acquired from the above tasks, the Urban Partners/Civitas team will prepare a Preliminary BID Plan for the proposed Downtown Rochester Business Improvement District. The five-year business plan will include all required documentation and methodologies in accordance with *NY General Municipal Law (GMU), Chapter 24, Article 19-A, Business Improvement Districts*. These include:

- District map;
- Description of district boundaries;
- Description of present and proposed land uses;
- Description of the proposed improvements;
- The total annual amount proposed to be expended for improvements, maintenance, and operation;
- The proposed sources of funding;
- The proposed time for implementation and completion of the BID plan;
- Any proposed rules and regulations applicable to the district;
- A list of the properties to be benefited;
- A statement of the calculation or methods (formula) by which the expenses of the district will be imposed upon benefited real property, in proportion to the benefit received by such property;
- Identification of the district management association.

■ Task 2.5: Review of Preliminary BID Plan (Meeting #4)

The Urban Partners/Civitas team will meet in-person with RDDC staff and the BID Formation Committee to review the Preliminary BID Plan. We will identify any necessary revisions and refinements to the document.

Phase 3: Outreach

■ Task 3.1: Establishment of Communications/Outreach Strategy

The Urban Partners/Civitas team will meet establish a communications and outreach strategy that will ensure support for the proposed BID among all impacted stakeholders, including the media. The team will produce marketing materials necessary to effectively convey the benefit and proposed functions of the Downtown Rochester BID, and to clearly explain the financial commitment and return of involved property owners. Materials produced will include an executive summary of the Preliminary BID Plan, handouts, mailings, meeting notices, and signature ballots. In addition, we can prepare text appropriate for placement on RDDC's website and social media sites that are available for this project.

■ Task 3.2: Review Communications/Outreach Strategy (Meeting #5)

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formulating Committee to review the communications and outreach strategy. This will include a discussion of community meeting dates and formats, information distribution, and the marketing materials produced by the team.

■ Task 3.3: Community Meetings 1 & 2

The Urban Partners/Civitas team will organize two community meetings to further raise awareness of and secure support for the BID among property and business owners and tenants. Prior to the meetings, we will request RDDC's assistance with securing meeting dates, locations, printing and packaging marketing material related to the meetings, distributing materials to property owners via mail and email, and advertising for the meetings. We will prepare a PowerPoint presentation for the meetings to inform the community about the BID process and its benefits, as well as present the BID Plan, budget, and proposed assessment.

■ Task 3.4: Solicitation of Letters of Support

Working with RDDC staff and the BID Formulating Committee, the Urban Partners/Civitas team will solicit letters of support for the Downtown Rochester BID from property owners, merchants, residents, institutions, and other stakeholders including elected officials, and other area entities.

Phase 4: Legislative

■ Task 4.1: Plan Submittal to Mayor

With the BID Plan approved by the BID Formulating Committee and significant outreach conducted, the Urban Partners/Civitas team will deliver

the Preliminary BID Plan to Mayor Evans. Any suggested revisions will be made to the document prior to submitting it to the City Clerk.

■ Task 4.2: Plan Submittal to City Clerk

Upon review of the Mayor, the Preliminary BID Plan and letters of support will be delivered to the Rochester City Clerk.

■ Task 4.3: Assistance with Public Notice Mailings

Following the BID Plan's submittal to the City Clerk, Rochester City Council will adopt a resolution announcing that the Downtown Rochester BID Plan is on file and a hearing will be held regarding the Plan. The resolution will state that any property owner within the district objecting to the Plan must file an objection at the Office of the City Clerk within 30 days of the hearing. The legislative body will publish the resolution in a public newspaper. It is at that time—no less than ten nor more than thirty days before the date set for the hearing—the legislative body will require a copy of the resolution or a summary thereof to be mailed to each owner of real property within the proposed district as well as the tenants of each building within the proposed district. The Urban Partners/Civitas team will work with RDDC staff and the BID Formulating Committee to distribute the required public notice mailing.

■ Task 4.4: Ongoing Outreach Efforts

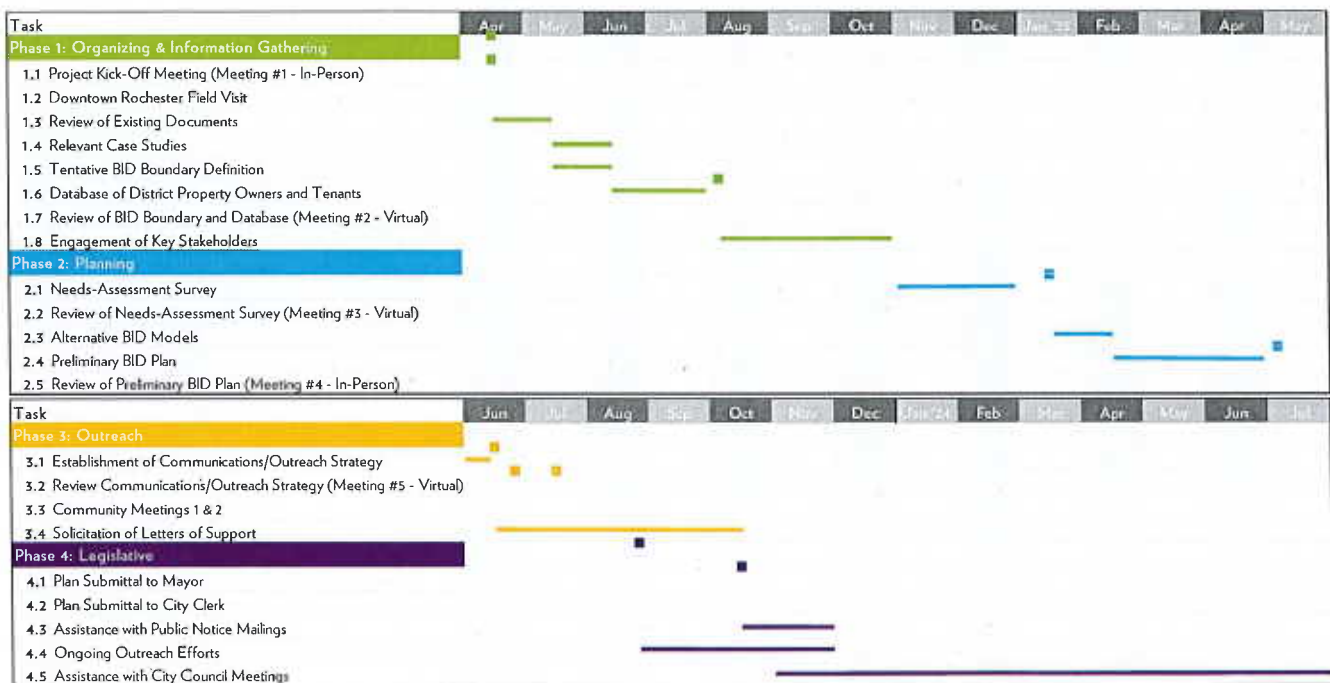
With assistance from the BID Formulating Committee, the Urban Partners/Civitas team will continue outreach efforts to the BID stakeholder community during the legislative phase to secure acceptance and support documentation. This could include attending meetings with property owners, merchants and related individuals, and stakeholders. Also, marketing material prepared in Task 3.2 and any materials prepared for the Community Meetings in Task 3.3 can be further distributed during this effort.

■ Task 4.5: Assistance with City Council Meetings

The Urban Partners/Civitas team will support RDDC staff and the Committee by attending the remaining Rochester City Council meetings necessary for final BID approval, including the approval of forwarding the Plan to the New York State Controller for review and approval, approval of the creation of the BID assessment district, and approving RDP as the BID management entity. At these meetings we can present details and answer questions regarding BID services, projects, assessment, budget, and management structure. We assume we could attend these meetings virtually.

Project Timeline

The Civitas/Urban Partners team is prepared to provide services to RDDC for implementing the Downtown Rochester BID through July 2024, when it is anticipated that the BID will begin operations, assuming a start date in early April 2022. Below is our proposed schedule in relation to each task, highlighting approximate points when specific meetings and work tasks would potentially occur. We are open to any modifications to this schedule.



Cost Proposal

The Urban Partners team is prepared to provide services to RDDC for implementing the Downtown Rochester BID for a total project fee of \$83,042, which includes all professional and out-of-pocket expenses associated with our work. Out-of-pocket expenses, which consist of travel, document production, and necessary data purchases, will be billed at cost. We are flexible and willing to consider modifications to the scope tasks and fee.

Task	TOTAL All Staff	Civitas Fehan	Urban Partners Lankenau Hartling	Civic Ventures Weiss	Glass House DiGiovanni	Total
Phase 1: Organizing & Information Gathering						
1.1 Project Kick-Off Meeting (Meeting #1 - In-Person)	24	8	8	8		
1.2 Downtown Rochester Field Visit	24	8	8	8		
1.3 Review of Existing Documents	12	3	4	3	2	
1.4 Relevant Case Studies	16	4	8	4		
1.5 Tentative BID Boundary Definition	14	3	4	4	3	
1.6 Database of District Property Owners and Tenants	24	0	24			
1.7 Review of BID Boundary and Database (Meeting #2 - Virtual)	10	2	4	2	2	
1.8 Engagement of Key Stakeholders	36	10	16		10	
Total	160	38	76	4	28	\$29,960
Phase 2: Planning						
2.1 Needs-Assessment Survey	52	2	8	2	40	
2.2 Review of Needs-Assessment Survey (Meeting #3 - Virtual)	17	2	4	4	5	
2.3 Alternative BID Models	18	5	8	5		
2.4 Preliminary BID Plan	62	6	32	4	10	10
2.5 Review of Preliminary BID Plan (Meeting #4 - In-Person)	16	0	8	8		
Total	165	15	60	8	27	\$31,232
Phase 3: Outreach						
3.1 Establishment of Communications/Outreach Strategy	27	5	16	6		
3.2 Review Communications/Outreach Strategy (Meeting #5 - Virtual)	10	3	4	3		
3.3 Community Meetings 1 & 2	16	0	16			
3.4 Solicitation of Letters of Support	13	5	8			
Total	66	13	44	0	9	\$12,176
Phase 4: Legislative						
4.1 Plan Submittal to Mayor	2	0	2			
4.2 Plan Submittal to City Clerk	2	0	2			
4.3 Assistance with Public Notice Mailings	8	0	8			
4.4 Ongoing Outreach Efforts	13	5	8			
4.5 Assistance with City Council Meetings	16	0	16			
Total	41	5	36	0	0	\$7,674
Total Task Hours	432	71	216	12	64	69
Hourly Billing Rates	-	\$210	\$184	\$249	\$150	\$200
Task Costs	\$81,042	\$14,910	\$39,744	\$2,988	\$9,600	\$13,800
Reimbursable Expenses (Travel, Data Purchase, etc.)	\$2,000					
Total Costs	\$83,042					

Att-B



**ROC the Riverway
Management Entity Study
Final Report**

January 2020

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ROC the Riverway Management Entity Study Final Report

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ROC the Riverway Management Entity Study Final Report

Background

The unveiling of the City of Rochester's \$500 Million ROC the Riverway plan for redevelopment on the banks of the Genesee River through Downtown Rochester and extending into neighborhoods to the north and south has amazing potential as a catalyst for long-term revitalization of the city's central area. Numerous municipalities across the country have taken advantage of once-neglected waterfronts to spur a renewed interest by residents and investors. Redeveloped riverfronts in Memphis, Tampa, Tulsa and others are credited with fostering a renewed spirit of civic energy and enthusiasm.


The timing was no accident. In 2016, a Rose Center panel noted the potential role of the Genesee River as an opportunity to essentially bind the eastern and western portions of downtown more closely as a unit, capturing the assets of each to create a more dynamic whole. Further, it was noted that issues related to a previous attempt to create a business improvement district and emerging concerns about the future role of the Downtown Enhancement District provide an opportunity for fresh thinking about an approach to providing enhanced management services in the core area.

With the dramatic announcement in 2018 by Governor Andrew Cuomo of a \$50 million grant to jumpstart ROC the Riverway, the vision is now rapidly being put into motion. The ROC the Riverway Advisory Board assigned that funding to a number of priority riverfront projects in August 2018. Notably, a key project identified by the Advisory Board is the establishment of a Downtown/Riverfront Management Entity, which was allocated \$3 million to start operations.

In its 2019 Top Issues Council Report on Municipal Partnerships, the International Downtown Association (IDA) notes that "urban place management organizations...have played a critical role in addressing issues that relate to the function and vitality of urban spaces and the investment of private funds to incentivize and benefit commercial activity in those spaces."

While examples from elsewhere suggest that such an entity may evolve to take on a wide variety of activities, particular emphasis in the ROC the Riverway Vision Plan was placed on *programming* and *maintenance* of the newly created public spaces. Its overall structure, however, should be designed with the capacity to respond to

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emerging opportunities and challenges. Furthermore, to be truly effective, it was acknowledged in the Vision Plan that it should be “a non-municipal entity that is nimble and enjoys greater flexibility in decision making and implementation.”

A Management Entity Working Group, made up of public, private, and non-profit sector stakeholders began meeting in late 2018 to guide this effort. To assist, the City and New York State partnered to secure the services of James Cloar and Rick Reinhard, private consultants with considerable experience in the formation and operation of place management entities. Early in the deliberations of the Working Group, a matrix of organizational types was prepared. Of those types, a “partnership” entity was recommended as best suited to address the highest ranked activities for both near and longer term. Perhaps popularized by the Downtown Denver Partnership, the term represents not only a spirit of collaboration between the public and private sectors, but also typically portrays a “family” of not-for-profit bodies, each with specific, unique roles and powers but aligned toward a common goal.

Final Recommendations

Over the span of nearly a year, after interviewing dozens of stakeholders and holding multiple meetings with the Management Entity Working Group, the consultants made the following conclusions and recommendations:

The initial grant of \$3 million for the management entity is a significant investment and could support a start-up operation for a few years, but long-term funding solutions must be identified. Among those solutions, the creation of a business improvement district (BID) offers the most promise for a sustained source of revenue. Establishing a BID is a long-process, taking 18-24 months to develop a plan, achieve support, and pass the necessary legislation at both the State and local levels.

Combined with the long-standing desire to have a BID covering all of the downtown area, this represents an opportunity to bring together the river and downtown in a truly comprehensive and transformative manner. An assessment formula must be derived that establishes a clear relationship to value received. The State imposed 2% tax cap places a limiting factor on the total assessment that can be levied at any one time.

The existing Downtown Enhancement District (DED) was established in the mid-1980s on a rationale of assessing those properties adjacent to Main Street but was also extended to those connected to Main Street via skyways or similar linkages. Since many of the skyways have since been removed, that rationale has become

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moot. It has also been suggested that the DED is out of date since it does not cover much of the downtown area. Concerns have been expressed about responsibilities regarding the new entity and its relation to existing public employees performing similar services for the DED. Working relationships will need to be “negotiated” and clarified early on. The DED has an existing assessment levy of \$646,900.

The larger maintenance responsibilities related to the new and upgraded riverfront parks and public spaces, and thus funding needs related thereto, will not fully emerge for a few years, until the various capital projects are completed.

There are present needs that can and should be addressed as soon as possible. These include: undertaking a sustained, strategic marketing/public awareness initiative; implementing initial programming and preparing a longer term programming strategy; beginning the process of establishing a BID; exploring additional funding targets; identifying corporate and philanthropic benefactors/champions; and, building community relationships, especially with City staff.

As a starting point, a new 501(c)(3) organization, tentatively known as the Rochester Riverway / Downtown Partnership (RRDP), should be established as soon as possible. For expediency, the reformulation of an existing 501(c)(3) would be preferable. The Rochester Downtown Development Corporation (RDDC) has offered to repurpose their existing dormant 501(c)(3) that was used for a previous downtown services function. New or amended articles of incorporation should be filed and a board of directors established.

A possible initial RRDP Board that captures both significant public and private sector representation, as developed in consultation with the City and the State, could include the following (or their designees):

- Mayor, City of Rochester
- President, Rochester City Council
- Monroe County Executive
- Empire State Development Regional Director
- RDDC Board Chair
- RDDC President
- Visit Rochester Board Chair (or President)
- Greater Rochester Chamber of Commerce Board Chair (or President)
- Private Sector At-Large (appointed by the Governor)

While additional entities may eventually be created, as noted above, this initial Board would remain in place as part of an umbrella, or partnership, organization. In

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particular, once a BID is created, a separate BID Board is required with its composition dictated by State law. This is a typical arrangement among partnership entities. As an example, the “Board of Advisors” for Downtown Grand Rapids (MI) Inc. is described as providing “a continuous conversation and heightened collaboration that helps drive...vision and strategy, encourage mutually reinforcing activities among all participants, and deliver better results for the community.”

An early action of the RRDP Board should be to hire or designate an Executive Director, who in turn would hire a small, start-up staff to include an administrative assistant/office manager and a marketing/programming manager.

For the first 1-2 years, tasks for the newly-formed RRDP should include:

- Refine a mission and vision statement for the organization;
- Marketing/community outreach;
- Initial programming/develop a programming strategy;
- Develop relationships, especially with City staff (the IDA Report stresses that successful partnerships are “built on trust and respect.”);
- Specify performance measures for the organization (near-term and long-term);
- Prepare a memorandum of agreement/contract with the City regarding relative responsibilities for public lands;
- Initiate the BID process in concert with public and private sector stakeholders, notably RDDC and the Downtown Enhancement District; and,
- Develop additional funding sources (City contract? Additional State funding? Foundation support? Earned income from events, memberships, enterprise activities, banner revenues, fees, etc.

Projected Staffing and Expenses

The projected staffing and expenses of the RRDP in its first three years are provided below. This projection takes an overall conservative approach. Rent-related expenses may be offset by donated or shared space. Staffing figures are based on a part-time bookkeeper the first year and a full time bookkeeper in the second and third year, in addition to a full-time Administrative Assistant. However, it may be possible to combine these roles into a single Office Manager position, at least in the early years. Staffing assumes a starting salary of \$140,000 for the Executive Director. It should be noted that the organization’s expenses will ramp up significantly as it takes on more responsibilities, especially for maintenance.

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- Year 2020-21
 - Staffing: Hire Executive Director, Marketing Manager, Administrative Assistant, and Bookkeeper (part-time)
 - Expenses:
 - Staff: \$280,000
 - Benefits: \$70,000
 - Rent: \$50,000
 - Office Expenses: \$50,000
 - Projects/Programs: \$100,000
 - TOTAL: \$600,000
- Year 2021-22
 - Staffing: Hire Operations Manager, Bookkeeper becomes full-time
 - Expenses:
 - Staff: \$420,000
 - Benefits: \$105,000
 - Rent: \$52,500
 - Office Expenses: \$52,500
 - Projects/Programs: \$270,000
 - TOTAL: \$900,000
- Year 2022-23
 - Staffing: Hire Planning Manager and second Admin. Assistant
 - Expenses:
 - Staff: \$550,000
 - Benefits: \$137,500
 - Rent: \$55,000
 - Office Expenses: \$55,000
 - Projects/Programs: \$400,000
 - TOTAL: \$1,200,000 (approx.)

Appendices

The findings and recommendations presented in the above Final Report were developed based on considerable effort over the course of 2019. Three interim reports are attached herein as Appendices, documenting the process that was followed to reach these final recommendations.

Appendix A – Task 1 Report: Orientation and Priorities

Appendix B – Task 2 Report: Organizational Models

Appendix C – Task 3 Report: Recommended Structure



Appendix A

Task 1 Report: Orientation and Priorities

Summary

From March 5-8, 2019, James Cloar and Richard Reinhard were on site in Rochester, meeting with over 40 public and private sector representatives.

Upon arrival on March 5, an introductory meeting was held with Mayor Lovely A. Warren and Chief of Staff Alex Yudelson, as well as Erik Frisch, Manager of Special Projects, and Kevin Kelley, Senior Planner. A tour of the project site, from High Falls to the South River including Downtown, was conducted. Later in the day, a kickoff meeting with the ROC the Riverway Management Entity Working Group was held.

On March 6, meetings with key City and State staff were conducted, including:

- Norman Jones, Commissioner, Department of Environmental Services
- Baye Muhammad, Commissioner, Department of Neighborhood & Business Development
- Vincent Esposito, Regional Director, Empire State Development
- Tamara Mayberry, Intergovernmental Affairs, Empire State Development
- Chris Wagner and Suzanne Warren, Office of Management & Budget
- Justin Roj, Director of Communications
- Karen St. Aubin, Director of Operations
- Anthony Orphe, Director of Buildings & Parks
- Captain David Smith, Rochester Police Department Central Section
- Dana Miller, Director of Development Services
- Paul Scuderi, Director of Real Estate

On March 7, six group meetings were held with various downtown and riverfront stakeholders including colleges and universities, developers/property owners, visitor destinations, arts and cultural organizations, and downtown employers. A list of participants is included at the end of this report.

On March 8, a follow-up meeting was held with the ROC the Riverway Working Group to review initial findings. Lastly, a final meeting with the Mayor's Chief of Staff was held.

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Results/Findings

The following is a summary of the findings from Task 1, based on the input received during the interviews and conversations with stakeholders.

There is broad consensus on the need for a management entity and that, among its roles, it be a convening, coordinating body. There was essentially a confirmation of the short-term and long-term priorities of its responsibilities as identified earlier by the Working Group.

The management entity should be “nimble” with an entrepreneurial spirit. It should operate “outside of,” but in close cooperation with, City Hall. At the same time, the management entity should take care to be transparent and inclusive.

There is a need for early public attention to progress being made on the ROC the Riverway initiative. This is truly one of the more exciting and ambitious projects in the country. The general public needs to be aware of progress, with celebration of and attention called to milestone achievements.

The management entity’s geographic area should cover the entire downtown area, including the downtown core of the Riverway, rather than having separate entities for downtown and the Riverway.

Trail connections are an especially important feature.

The initial funding secured through Phase One of ROC the Riverway is highly valued but long-range funding must be addressed. Many of those we met with urged creation of a “BID-type” mechanism (assessment-funded) to provide sustained financial viability, particularly to support the new management entity.


Concerns

The following is a summary of the concerns raised by stakeholders during the interviews and conversations conducted during Task 1.

Tax Cap. The State mandated tax cap could constrain potential assessment revenues that would be raised through a Business Improvement District.

Special events. Potential confusion over roles/responsibilities (especially special events) should be addressed early. Should the new entity manage special events only “in the water,” only along the Riverway, or also throughout the downtown area?

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Maintenance and litter control. Whether handled directly by City staff or the new management entity, more specialized equipment will likely be needed to reach and efficiently deal with maintenance of the new public spaces. City Operations staff were not adequately familiarized with the plans for ROC the Riverway to address the needs in more detail.

Security/hospitality. Because the riverbanks are somewhat out of sight from normal street level activity and with the design of ROC the Riverway possibly including secluded areas, there are potential heightened security impacts – both real and perceived. (Note: the Police representatives we met with had not reviewed the ROC the Riverway plan but promised to do so). In addition, if ROC the Riverway achieves its goal of attracting new local and non-local visitors, there will be a need for a “hospitality” presence. Police representatives suggested that a Police Union impact may arise, similar to that experienced previously with the otherwise effective Red Shirt crew.

Any assessment levels proposed must be based on equitable benefits. Large property owners agreed “in concept” with the idea of assessments but cautioned that the amounts must be based on equivalent value received. In particular, there would be resistance to an assessment that appears to primarily go for Riverway programs if not appropriately discounted for properties located several blocks away from the river. (Overlay or sub-districts could be an approach to address this).

The future approach for the Downtown Enhancement District was raised several times (regardless of whether or not a BID is established). The boundaries and services were among the issues, including the impact of removal of several of the skyways, which had effectively extended the properties “connected” to Main Street. Some concern was raised about the way in which the DED is controlled.

The water itself as an attraction is not a given, since the flows and levels are not within the City’s control north of the Court Street Dam. At times of low water levels, the river is less visually appealing. In addition, due to the dams and the presence of High Falls, most of the river through the downtown area is unavailable for activities such as boating or kayaking.

During the colder Winter months, events and design features will need to be considered and should be incorporated to the greatest extent practical to keep the Riverway active year-round.

Careful consideration needs to be given to leveraging the \$3 million initial funding through Phase One of ROC the Riverway for the management entity toward long-

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term, sustainable funding. This amount represents a healthy start, but it's only a start. Depending on the level and types of services provided, this could only fund the management entity for a few years at best.

The previous attempt to establish a BID may provide helpful lessons, particularly with respect to approach. The earlier considerable effort and research are instructive from a technical standpoint but perceptions will also be important.

Given the expectation that ROC the Riverway will be successful in attracting more frequent and longer visitor stays, it was suggested that a portion of the hotel/motel tax could be a source of funding. However, that source is controlled by the County and the implications could be complex, especially to the degree that it would divert funding from other current uses.

Items for Further Near-Term Investigation

The following is a summary of items that have been identified as important for additional research and investigation in the near-term.

- Tax cap – how are potential BID or other assessments affected – how does it influence BIDs in other NY cities?
- How would the new management entity best relate to other existing entities such as the DED, RDDC and the High Falls BID?
- More in-depth understanding of potential models such as Buffalo, Baltimore, Grand Rapids, Memphis, and other NY State “BIDs” (operating budgets, sources of income, Board make-up/control).

List of Participants in Stakeholder Group Meetings

Colleges & Universities

- Center for Urban Entrepreneurship/Rochester Institute of Technology
- Eastman School of Music/University of Rochester
- Rochester Educational Opportunity Center/SUNY College at Brockport

Downtown Developers

- Buckingham Properties
- Christa Development
- Gallina Development
- Home Leasing
- Landers Management

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- Winn Development

Visitor Destinations

- Fringe Festival
- Greentopia
- Rochester Red Wings
- The Strong – National Museum of Play
- Visit Rochester

Arts & Culture

- Geva Theatre Center
- Rochester Broadway Theatre League
- Rochester Philharmonic Orchestra
- Rochester Public Library
- WXXI/Little Theater

Downtown Employers

- Datto
- ESL
- Excellus

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Appendix B

Task 2 Report: Organizational Models

Summary

From April 23-25, James Cloar was on site in Rochester. Upon arrival, he met with the ROC the Riverway (RTR) Management Entity Working Group, where he reviewed the Task 1 Report and discussed several management entities that could offer lessons for Rochester. These included Memphis, Ithaca, Troy, Syracuse, Baltimore and Grand Rapids, MI (an overview of these and several other cities follows). Some interest was expressed in potential visits to Rochester by leaders of some of these groups. There was also considerable interest in communication of steps toward implementation of the ROC the Riverway plan. Cloar later attended Mayor Warren's State of the City Address where the Mayor stressed several RTR projects already underway or about to start.

Over the next two days, Cloar met with and/or re-visited with various City officials and other stakeholders, including:

- A City Council work session attended by City Councilmembers Mitch Gruber, Willie Lightfoot and Malik Evans; City Council Chief of Staff Andrea Guzzetta; and several City Council member aides. The Mayor's Chief of Staff Alex Yudelson also attended.
- Deputy Mayor James Smith
- DES Commissioner Norman Jones
- DRYS Commissioner Daniele Lyman-Torres
- Budget Director Chris Wagner and Suzanne Warren, of the Office of Management and Budget
- Heidi Zimmer-Meyer, RDDC
- Saul Maneiro, Community Impact Relationship Manager, ESL Charitable Foundation

Primary points of focus to be addressed in "designing" the new management entity, as identified in the several rounds of meetings to date are: (a) sustainable financial support; (b) near-term ability to address messaging and coordination of programming; (c) relative responsibility between the new entity and City agencies; and (d) appropriate governmental oversight.

1. The most common point from discussions at this stage is an **eagerness to communicate and build excitement** in the community about progress and milestones in implementing the RTR plan. Several ad hoc steps are being taken in

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this regard including the Mayor highlighting it in her State of the City address, several postings on Twitter, and using custom construction signage to reference related projects as an RTR development.

2. There is also a high degree of anticipation by several agencies/organizations about the potential for the new entity to serve as a **focal point for cooperation/coordination of programming and special events** on the Riverway and, to an extent to be determined, throughout downtown.

3. The biggest concerns relate to **long-term funding** for the entity and **responsibility/accountability** for maintenance and programming of the public spaces along the Riverway and throughout downtown.

While there is “general” (but not necessarily universal) support for funding coming from a Business Improvement District or other form of assessment for the RTR entity and even including all of downtown, there are several hurdles in implementing a BID:

- a. A **State-imposed tax cap** limits the amount the City can increase its total revenues in any year, including those derived from assessments and Payments in Lieu of Taxes (PILOT).
- b. A BID that concentrates **only on the Riverway includes mostly public land** and thus would generate limited assessment revenue.
- c. A BID that also includes all of downtown would need to clearly demonstrate that benefits would be proportionate to assessments since **many of the larger payers would be several blocks removed from the Riverway**.
- d. The previous attempt to enact a BID for downtown was objected to in part because of its **impact on not-for-profits and churches**, even with a discounted rate, as well as by some property owners. There was also concern about the **impact on existing City staff** who currently perform functions that were proposed to be assumed by the BID.
- e. The **process for establishing a BID is lengthy**, including development of a “plan” which establishes an assessment formula and specifies related services, a petition process, and subsequent governmental approvals. (The previous 2014-15 effort outlined a 17-month timetable.)

Potential paths to resolution:

- a. Since implementation of a management entity is a critical piece of the State-funded ROC the Riverway initiative, one option is to seek an **exemption from the State’s tax cap**.
- b. Determine whether an **alternative structure**, such as a public benefit corporation or authority, would bypass the tax cap. For example, Buffalo’s “BID” is a creature of Erie County, which collects the assessment district

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revenue. In Philadelphia, the “BID” is recognized as an independent “authority” and thus assesses - and collects - revenues directly.

- c. Revenue needed from “assessments” could be minimized through **other sources** such as donations, grants, special events, contracting, and licensing. (These are fairly common practices.)
- d. The **existing Downtown Enhancement District** could be incorporated into a new BID and potentially mitigate the net increase that would count against the tax cap.
- e. The **City could contract with the new entity** to handle maintenance of the new parks and other public spaces for which, and to the level, it would otherwise be responsible, such as Charles Carroll Plaza and High Falls Terrace Park (as done in Memphis, Tulsa and other examples)?
- f. The **Foundation/philanthropic community** is a potential source of revenue, at least for specific projects or programs and merits further consideration.
- g. **Responsibility/accountability** is typically handled through Board membership (Tulsa’s River Parks Authority), annual approvals (Memphis River Parks Partnership), and contractual relationships/Memoranda of Understanding (DC’s Capitol Riverfront BID, St. Louis’ CityGarden).
- h. **In-kind donation** of office space and/or equipment, at least as a start-up, would positively impact the budget of the entity.

Lessons from elsewhere


The following is a list of organizations throughout the country that may offer valuable organizational and funding lessons for Rochester. Targeted relevancies include: a) similar riverfronts, b) funding techniques, and/or c) City oversight/governance. None are to be considered exact models from top to bottom.

Memphis, TN: Memphis River Parks Partnership

Though the Mississippi is “free flowing” and about one mile wide at this point, there are several parallels in terms of the management entity.

As with ROC the Riverway, the Memphis River Parks Partnership was *established following the adoption of a master plan*, developed “with a goal of “melding parks and attractions along a 6-mile stretch of the Mississippi into a ‘fun, connected and catalytic riverfront’”. The plan was designed to provide a “connective network of spaces and opportunities that enrich the human experience, lift the fortunes of Memphis as a whole and reinforce its future viability and resiliency.” (map attached)

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The Partnership is a 501(c)(3) not-for-profit that is a successor to the former Riverfront Development Corporation. *Through a 13-year "agreement" with the City,* it manages, maintains, operates and activates five connected riverfront park districts encompassing 250 acres of parkland, as well as multiple rental and performance facilities along the riverfront. It also has responsibility for the redevelopment of a major existing riverfront park, which is the traditional setting for the internationally known Memphis in May festival (and is presently in a "mitigation process" with the organizers to resolve certain design aspects).

MRPP receives *almost \$3 million from the City annually* but (in the words of the Executive Director) "has to fight for it each year." Additional revenue comes from parking, boat docks, leases and special event revenues in parks and park facilities. The current Executive Director is "on loan" from the Kresge Foundation, which funds her compensation and a staff of 18.

There is also a *Friends for Our Riverfront* organization (formed in 2003). It is a nonprofit, all-volunteer citizen group "dedicated to the wise use of our riverfront resources for the enhancement of our community." Their goal "is to promote improvement of the public space along the riverfront to its full potential as a green space for public enjoyment, preserving its historic, natural, and aesthetic character, and to support a clean and vibrant harbor."

Tulsa OK: Tulsa River Parks Authority

The Arkansas River runs through the "greater" downtown area and neighborhoods east and south *approximately the same length of the Genesee and is similar in width,* though it is less connected to downtown (map attached). Somewhat similar to the Genesee, its course includes a series of "low-water dams", thus there is an ability to impound water depending on hydrological conditions.

Management and funding is through a City-County "Authority" (a common device in Oklahoma). Total 2018-19 budgeted operating income of \$1.8M includes \$1.3M split between the two governmental entities, the remainder coming through grants, contributions and other sources including one major special event.

The River Parks Authority (RPA) is governed by a seven-member Board of Trustees, three appointed by the County, three by the City, and one by the Tulsa Metropolitan Area Planning Commission. Trustees serve two 3-year terms. The Board generally meets once a month to conduct official business and plays a major role in private fundraising for River Parks programs and projects. RPA is responsible for maintenance of selected areas and also provides seasonal patrols (security). It covers 26 total miles of asphalt surfaced trails, including nine miles on the more

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heavily populated east bank. The Executive Director guides day-to-day operations for the Authority and oversees a staff of eleven employees.

RPA has a close relationship to *A Gathering Place*, a recently opened and highly acclaimed park (66.5-acre first phase) that abuts the Arkansas River. Construction and on-going management of A Gathering Place was funded primarily by a private foundation, but a *River Parks subsidiary* is the “owner” and thus provided tax-exempt status and liability limits during construction. Ongoing operations and maintenance are handled by the Gathering Place team, but partnership continues through planning for some special events and coordinating activities along the trail.

Tampa, FL: Tampa Riverwalk

The newly expanded Tampa Riverwalk extends through downtown and the neighborhood to the north a distance of 2.4 miles along the east side of the Hillsborough River, with plans to extend it further in length as well as to develop a companion Riverwalk along on the west side of the River. It was recently selected as “Greatest Place in America: People’s Choice Award”, by the American Planning Association.

At a width of 300-400 feet, the river is *somewhat comparable to the Genesee River but is unencumbered by dams and thus is free-flowing*. Accordingly it accommodates watercraft including a water taxi, kayaks, paddle boards and pleasure boats.

The Riverwalk extends through a publically accessible terrace at the Tampa Convention Center and abuts three large public parks and several smaller parks. On the east (CBD-side) bank, Curtis Hixon Park hosts numerous major special events. On the west bank, Julian B. Lane Park has been re-designed and now includes a large boat house.

There is presently no formal management entity of the Riverwalk outside of City Hall. *It is patrolled by the Downtown Guides (hospitality) and by the Clean Team (litter pickup), through the Downtown Special Services District BID*. Repairs and related maintenance are handled by the Parks Department, which also coordinates special events.

Additional support comes from the *Friends of the Riverwalk, a non-profit 501(c)(3)*. “Friends” *promotes the Riverwalk and raises support funding for certain enhancements* such as shade structures, docks, banners and educational opportunities. Working in conjunction with the City, Friends has also spearheads funding for the development of the Historical Monument Trail along the Riverwalk, featuring a series of busts of a prominent leaders that have played a role in Tampa’s development over the years.

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Buffalo

Canalside's success has been suggested as a possible example from several standpoints, including its well-executed and funded approach to marketing and programming. Several of those interviewed suggest that its *potential as a management and financing tool model is limited* since it is a creature of Empire State Development's Erie Canal Harbor Development Corporation.

Nearby *Buffalo Place*, a BID, contracts to provide selected services to the Erie Canal Harbor Development Corporation (at \$265K). Buffalo Place has a total budget of \$2.4M, with \$1.7M coming from *assessments collected by the County* (Buffalo Place is a "creature" of Erie County rather than the City). Marketing expenses for Buffalo Place total \$460K, including \$161K for special events. Ranger/escort services total \$447K. *Snow removal has a significant direct and indirect (liability insurance) impact on their budget.*

Recently, *The Ralph C. Wilson Foundation has committed \$50M to redo the waterfront LaSalle Park, including \$10M for long-term management (maintenance and programming), potentially through a Conservancy, plus another \$50M to improve and extend trails.*

The long-established *Olmstead Parks Conservancy* partners with the City in stewardship, advocacy, programming and development of parks throughout the community. The Conservancy is a 501(c)(3) not-for-profit that takes care of a half-dozen parks in the City of Buffalo. It is a \$4.8M per year organization, with about \$2M coming from government grants (including \$520K in capital grants), \$670K in contributions, \$872K in-kind, \$700K from program revenues, and \$225K from special events. About \$3M in expenditures goes for operating costs.

Grand Rapids, MI: Downtown Grand Rapids Inc (DGRI)

This is an umbrella management entity for the combined operations of the Downtown Development Authority, Downtown Improvement District ("BID"), and the Tax Increment Finance Authority. Its total revenue of \$14M, includes \$1M in assessment district income as well as \$333.5K in sponsorships and \$500 in parking revenue. The bulk of its budget is related to its role as the City's redevelopment authority.

In addition to the *Mayor-appointed boards of directors* overseeing the unique operations of each of the DDA, DID, and Monroe North TIFA, DGRI is guided by a Board of Advisors as well as five separate Alliances comprised of citizen volunteers that help guide DGRI's work and investment.

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St. Louis

*A private foundation funded the 2009 development, and handles ongoing management and programming of, **CityGarden**, an award-winning development on City-owned land in downtown St. Louis. CityGarden is 2.9 acres, occupying two square city blocks, and cost \$30 million to develop. St. Louis' Gateway Foundation funded the design and construction of the garden and the related art. It continues to own the statues and covers all park maintenance costs except water and electricity. The Gateway Foundation is also in charge of providing additional security for the garden. Arrangements are set through a 15-year "cooperation agreement" which is automatically renewed each 5 years unless terminated by either party.*

*A non-profit "partnership" entity (DowntownSTL) staffs the Community Improvement District (CID), which has contracted for the City to handle what would otherwise be CID responsibilities for landscape care and maintenance in selected areas. DowntownSTL also staffs a foundation and a not-for-profit development corporation. Through these various entities, it developed, owns, maintains and programs **Old Post Office Plaza**, a one-acre "public" park in the heart of the downtown core.*

Philadelphia: Center City District

This is a large BID emphasizing "clean and safe" programs as well as marketing and selected capital projects. It is established as an independent "authority", thus directly collects assessment revenues.

Baltimore: Downtown Partnership of Baltimore

The Baltimore Downtown Partnership staffs the Downtown Management Authority, which has a budget \$9.6 M, including \$8.5M from assessments ("Property Surcharge") supplemented by other fees, grants and contracts. The bulk of expenses go for safety/hospitality and on maintenance/litter pick-up of downtown streets and sidewalks. It also spends \$1.3M on "Parks and Programming". The parent organization also includes a foundation, as is typical for most "partnership"-type entities. It is distinct from, and occasionally in conflict with, the Waterfront Partnership of Baltimore.

Washington DC: Capitol Riverfront BID

This BID has responsibility for maintenance, programming, events, security and fund-raising for District (City) owned parks within its boundaries. CRBID has an annual MOA with the DC Dept of Public Works for maintenance, operations and programming. Yards Park, a ULI Open Space Award winner, has an annual budget of \$1.1M while Canal Park has a \$450K operating budget, with related revenue coming from leases, sponsorships and other income through the City/BID MOA.

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Sacramento, CA: River District

The River District is a PBID abutting downtown and about one mile from the core. The District has been *divided into two benefit zones to reflect the varying needs of assessed parcels*. The District provides three categories of services and related administration directly and only to assessed parcels: safety and maintenance; economic development (marketing); and planning, advocacy and physical improvements.

The total District assessment for the initial year of its ten-year operation is anticipated to be \$450,166.48. The assessment funding will be *supplemented by non-assessment funds*. Tax-exempt private parcels and parcels zoned exclusively for single-family residential purposes are not assessed.

Ithaca, NY: Downtown Ithaca Alliance

This BID has a total income of \$1,125,264, with \$520K coming from assessments including \$65K from an additional *overlay surcharge on properties in the Commons district*. Other sources are special events, city and county grants/contracts, and various fund-raising activities such as sponsorships and an annual dinner.

Syracuse, NY: Downtown Committee of Syracuse

The Downtown Committee of Syracuse has a total budget of \$1.3M, including *\$955K in assessment income*, plus grants, special events and annual meeting income. Programs include security (foot patrols and cameras) and “environmental maintenance.”

Troy, NY: Downtown BID

Total income for this BID is \$467K, with \$122K coming from assessments. The remainder is largely from sponsorships, foundation funding, sponsorships and contributions. Special events generate another \$270K. *The organization has a companion Foundation*, which acts as a fund-raising entity to handle donations and sponsorships

Appendix C

Task 3 Report: Recommended Structure

Summary

James Cloar and Rick Reinhard returned to Rochester on August 12-14. This visit involved meetings with several local officials and other stakeholders* to **present the recommendation for “immediate” implementation of a new not-for-profit management entity organization.** This new organization is recommended to take the form of a 501(c)3, potentially taking advantage of an existing, dormant 501(c)3 that would need to be reconstituted.

Many of the envisioned responsibilities and related funding/staffing for the management entity described in the ROC the Riverway Vision Plan, notably maintenance and enhancement, involve public spaces yet to be developed. However, there are near-term needs and opportunities that can – and should - be addressed much sooner by the proposed not-for-profit organization. These include:

- Based on the ROC the Riverway (RTR) Management Entity Working Group’s **ranking of near-term priorities**, and reinforced in previous interviews with the consultant team, there is a present desire and need to create and sustain **public awareness** about the ROC the Riverway plan and progress being made toward its implementation. This should take the form of marketing, promotions, and programming.
- In addition, it is important for this new organization to begin to **develop relationships** with City and State agencies, community partners and potential funding sources through building trust and mutual respect regarding relative roles and responsibilities.
- Among the likely reliable funding sources for Riverway and Downtown management is creation of a **Business Improvement District**. This will involve agreement on boundaries, establishing an equitable assessment formula, building property owner support, dealing with the State Tax Cap, and following prescribed governmental procedures. Since this will likely take 18-24 months, the process should begin as soon as possible.

The new not-for-profit organization would focus on these three key focus areas and other emerging initiatives related to ROC the Riverway. Initial funding would come primarily from the \$3 million seed funding provided through Phase 1 of ROC the Riverway that is designated for the management entity, an amount expected to

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cover two to three years of operations. Staffing would include a full-time executive director and limited support staff. Eventually, the organization would evolve to become more complex and robust as additional revenue streams and responsibilities emerge.

In general, the response from those interviewed and from the Working Group was encouraging, though some still had questions with respect to relative roles and governance. These and other issues will be more specifically addressed and detailed in the next task of this study.

Feedback Received

The following section compiles key points of feedback from the various interviews conducted during the August visit.

ROC 2025, a privately funded alliance of economic development corporations (including RDDC) has identified a “focus on downtown” as one of five “imperatives” for regional economic growth. While the direct implications for ROC the Riverway are as yet undefined, there is a potential for funding support for various initiatives of the new management entity. (ROC 2025 has already funded a downtown parking strategy through RDDC, a key concern expressed by downtown businesses and property owners.)

Developers expressed concern about possible redundancy of overhead, given the existence of the Chamber, RDDC, GRE and REDCO. They also wondered if the area to be covered – from High Falls to Genesee Gateway Park – was “too spread out” (especially if a BID is involved).

Representatives of the City’s Department of Environmental Services suggested that the hotel/motel tax could be a funding source for promotional efforts and/or whether REDCO could take on that responsibility. To provide funding for increased maintenance and related tasks, support will be needed from the private sector, including major stakeholders such as the Genesee Brewery and Rochester Gas & Electric (RG&E).

The City’s Special Events Department annually produces 30 events in-house and permits an additional 600 events. They work with numerous neighborhood groups, including 60 block parties each year. They support some events with cash. The permitting process for smaller events requires significant time. With respect to the role of the RTR management entity, one annual major special event would be “OK” as long as there is collaboration and coordination. There was some concern about the spaces being created since there are “so many underutilized spaces already.”

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[Note: There is a distinction between “special events” and “programming”. Spaces designed to be “self-programmed”, for instance, will be activated on a more sustained day-to-day, year-round basis without unnecessary conflicts or redundancy with other efforts. This includes incorporation of public art, self-guided trail markers, etc. In Tampa, the Riverwalk includes busts of historic local figures with description of their role and colorful markers telling educational stories about the river and its environmental impacts. Programming may also involve scheduling vendors, providing bike and boat rentals, buskers, etc.]

Members of the Working Group were supportive of moving ahead on implementation but raised several issues regarding a potential BID. A caution was raised about the impact of BID assessments on top of the dues paid to multiple organizations. Emphasis needs to be placed on related benefits, including the impacts on the RTR plan and its connection to all of Downtown. This was seen as an opportunity for a fresh perspective on the formation of a BID. Similarly, officials with Empire State Development and with the Mayor’s Office lent encouragement to the concept.

New leadership at REDCO provides an opportunity for potential alliances with an RTR management entity. This could be especially important with respect to the Riverway development becoming a marketing/promotional draw for new investment. Related objectives may include support for vendors, pop-up carts and kiosks as start-up ventures for young entrepreneurs. Of note is the make-up of the REDCO Board including broad civic leadership, thus possibly further broadening awareness and constituency for ROC the Riverway.

A follow-up call and email correspondence with Lisa Baron of Greentopia further explored the potential for establishing the entire length of the Riverway as an EcoDistrict. This program includes a certification process and results in connections to a “peer group” of similar entities across the country. In the case of Rochester, it would build on the initiatives already in place in the High Falls area and establish outreach and support to the County, the University of Rochester, and local volunteer groups, among others. It especially offers opportunity for educational tours, projects and “markers” that focus on the river and its current and historic impact on the City and the region, all as a key part of “programming” as described above.

Next Steps

The next step for the Study is to outline how this near-term 501(c)3 operating structure can be established as well as how it would evolve to incorporate features

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of alternate models that would best address mid and longer term needs and opportunities for the Riverway and Downtown. This includes establishment of a Business Improvement District (BID) and the future disposition of RDDC, the Downtown Enhancement District (DED), and other Downtown-focused organizations. A “business plan” including staffing and Board composition will be proposed along with discussion of potential funding sources. The following is a summary of the steps that need to be taken in order to establish and grow the Management Entity:

- Form an initial Board of Directors, to include appropriate representation from the public, private, and non-profit sectors, and selected members of the ROC the Riverway Management Entity Working Group.
- Establish a 501(c)(3) not-for-profit organization to take on currently-identified needs for marketing, promotion, and programming of the Riverway and pursue longer-range strategies regarding funding and other areas of management responsibility along the Riverway. Preferably, this would involve re-constituting an existing such entity with amended articles of incorporation and bylaws.
- Recognize that this lays the ground-work for an eventual “family” of entities that will focus beyond the Riverway to leverage its impact on economic and community development of the broader Downtown area. Such a “Partnership” (as is common in numerous other cities) would evolve to include a Business Improvement District, and could also include a membership organization and/or a “Friends of the Riverway” volunteer organization, among others.
- Hire or designate a full-time executive director with limited initial support staff (likely an Executive Assistant and a Marketing Manager), with funding primarily from the \$3 million seed funding earmarked for the management entity through ROC the Riverway, an amount expected to cover at least two to three years of base operations.
- Consider potentials for co-location or donation of office space, with an eye toward future facility requirements as operational responsibilities increase.
- Initial responsibilities for the organization include:
 - Implement an ongoing marketing and public awareness program regarding the ROC the Riverway plan, including media relations,

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public presentations, programming, and coordination with related agencies and private sector initiatives.

- Develop relationships with City staff and other entities, negotiating and defining relative roles and responsibilities for management of various portions of the Riverway.
- Begin the process of establishing an assessment district (“BID”) to provide a base level of funding for sustained long-term management of the public spaces created or enhanced through ROC the Riverway, as well as throughout the broader Downtown area, including defined maintenance and programming responsibilities. (This includes numerous tasks including working with affected property owners in support of establishment of boundaries, specific work program and an equitable assessment formula. It also dealing limitation associated with the State mandated “tax cap”.)
- Explore additional funding opportunities, including potential foundation support, net income from selected special events, contractual agreements (MOAs) with and by the City and other agencies.

* Interviews were held with the following stakeholders:

Deputy Mayor James Smith
Mayor’s Chief of Staff Alex Yudelson
Commissioner Norman Jones, Department of Environmental Services
Commissioner Danielle Lyman-Torres, Department of Recreation and Youth Services
Baye’ Muhammad, Rochester Economic Development Corporation (REDCO)
Erik Frisch, Manager of Special Projects, City of Rochester
Kevin Kelley, Senior Planner, City of Rochester
Vincent Esposito, Regional Director, Empire State Development
Tamara Mayberry, Intergovernmental Affairs, Empire State Development
Joseph Stekfo, President and CEO, ROC 2025
Karen St. Aubin, Director of Operations, DES
Anthony Orphe, Director of Building and Parks, DES
Kara Osipovitch, Special Events Operations Manager, City of Rochester
Chris Hill, First Federal Plaza
Darin Price, Buckingham Properties
Peter Landers, Landers Communities
Dave Christa, Christa Construction
Tim Fournier, Conifer LLC

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Heidi Zimmer-Meyer, President, Rochester Downtown Development
Corporation
ROC the Riverway Management Entity Working Group

ROC the Riverway Management Entity Study

Att-C

Working Group Membership

<u>NAME</u>	<u>ORGANIZATION</u>
Jim Brown	Floreano Rochester Riverside Convention Center
James Cloar	Consultant
Marc Cohen	Greater Rochester Chamber of Commerce
Veronica Dasher	RG&E
Jim Doser	UR/Eastman School of Music
Steve Dubnik	Strong National Museum of Play
Shawn Dunwoody	Artist
Vincent Esposito	Empire State Development
Dr. Joel Frater	Monroe Community College
Erik Frisch (Chair)	City of Rochester DES
Leah George VanScott	Greater Rochester Enterprise
Chris Hill	Downtown Property Owner
Jim Howe	Nature Conservancy
Kevin Kelley	City of Rochester Planning Office
Daniele Lyman-Torres	City of Rochester DRHS
Eugenio Marlin	Ibero American Development Corporation
Tamara Mayberry	Empire State Development
Gay Mills	Genesee Land Trust
Kara Osipovitch	City of Rochester Office of Special Events
Mary Beth Popp	Genesee Brewery/FIFCO
Rachel Laber Pulvino	Visit Rochester
Victor Sanchez	Roc City Coalition
Stefanie Schwingle	Washington Square Neighborhood Assn
Alex Yudelson	City of Rochester Mayor's Office
Heidi Zimmer-Meyer	Rochester Downtown Development Corporation

ADVISORY BOARD



BOARD MEMBERS

CO-CHAIRS

Bob Duffy | Greater Rochester Chamber of Commerce

Anne Kress | Monroe Community College

MEMBERS

Lisa Baron | Greentopia

Clement Chung | ROC City Coalition (Past Chair)

Veronica Dasher | Rochester Gas & Electric (AVANGRID)

Shawn Dunwoody | DUNWOODÉ Visual Consulting

Jim Howe | The Nature Conservancy

Norman Jones | City of Rochester Commissioner of Environmental Services

Nichole Malec | Constellation Brands (Downtown resident)

Eugenio Marlin | Ibero-American Development Corp.

Mary Beth Popp | North American Breweries

Heidi Zimmer-Meyer | Rochester Downtown Development Corporation

PROFESSIONAL STAFF TO THE BOARD

Holly Barrett | Assistant City Engineer

Chris Bauer | New York State Department of State

Kamal Crues | City Engineer

Vincent Esposito | Empire State Development, Finger Lakes Regional Director

John Fornof | City Budget Analyst

Tom Hack | City Structural Engineer

Kevin Kelley | City Planner, Project Manager

Tamara Mayberry | Director of Government Relations for the Governor's Office

Jeff Mroczek | City Landscape Architect

Alex Yudelson | Chief of Staff, City of Rochester

BOARD CHARGE

On February 27, 2018, Governor Cuomo and Mayor Warren announced the formation of an Advisory Board to conduct a public process to review and prioritize plans for public and private investment along the Genesee River corridor; this investment is better known as "ROC the Riverway." After completing a series of stakeholder sessions and a public review process, the Advisory Board shall present to the Governor and Mayor proposed recommendations on how to utilize an initial \$50 million State commitment; this shall be done by May, 2018. The goal of this process is to identify projects to focus investment along the river corridor in order to create dynamic public spaces, spur private development and job growth, repair and maintain critical infrastructure, and conserve and maintain the natural wonder and beauty of the Genesee River corridor.

ROCHESTER DOWNTOWN PARTNERSHIP (RDP)

Board Composition, as of 1/14/22

Organization/Office	Name
Rochester Mayor	Malik Evans
Rochester City Council President	Miguel Meléndez
Monroe County Executive	Adam Bello
Member, NYS Senate	Jeremy Cooney
Member, NYS Assembly	Demond Meeks
Empire State Development (<i>Advisory, Non-Voting</i>)	Vincent Esposito
Downtown Enhancement District	Rich Perrin
Rochester Downtown Development Corporation (<i>Board Chair</i>)	Chris Hill
Rochester Downtown Development Corporation (<i>Appointed</i>)	Andy Gallina
ROC 2025 (<i>Appointed</i>)	Joe Stefko
Greater Rochester Chamber of Commerce (<i>CEO</i>)	Bob Duffy
Floreato Convention Center (<i>Executive Director</i>)	Jim Brown
Visit Rochester (<i>Appointed</i>)	Rachel Laber
Downtown Property Owner	Dawn Williams-Fuller
Downtown Resident	Stefanie Schwingle
Community Member	Shawn Dunwoody
University Representative	Ebony Miller-Wesley
Community Advisory Committee	Eugenio Marlin

(NOTE: The President & CEO of RDDC will serve as RDP's Executive Director.)

Leadership

EXECUTIVE COMMITTEE CHAIR

Chris Hill

Vice President

I. Gordon Corporation

IMMEDIATE PAST CHAIR

Dr. Joel Frater

Retired

VICE CHAIRS

Jim Brown

Executive Director

JAF Rochester Riverside Convention Center

Tim Corcoran

CFO

CGI Communications

Steve Dubnik

President and CEO

The Strong

Brian Flanagan

Partner & General Counsel

Nixon Peabody LLP

Bret Garwood

Chief Executive Officer

Home Leasing

Chris Mannelli

Executive Director

Geva Theatre Center

Roosevelt Mareus

Dean/Executive Director

Rochester Educational Opportunity Center

Joe Rizzo

Manager

Economic Development & Community Relations, NYSEG
and RG&E

Victoria Van Voorhis

CEO

Second Avenue Learning

Josh Farrelman

Associate VP, Gov. & Community Relations

University of Rochester

Ebony Miller-Wesley

Director

RIT Center for Urban Entrepreneurship

TREASURER

Brie Harrison

CFO

SECRETARY

Christine Vargas

Founder & Owner

Vargas Associates

ADDITIONAL BOARD MEMBERS

David Beinetti

Principal & CMO,
SWBR

Craig Burton

Senior Vice President & Commercial Real Estate Executive
Five Star Bank

Alex Castro

President & CEO
PathStone Corporation

Keith Cleary

VP/Director — Business Banking
ESL Federal Credit Union

Dave DiProsa

Regional Director
Digital Hyve

Jim Doser

Director
Institute for Music Leadership, Eastman School of Music

Patrick Dutton

President
Dutton & Company

Steve Epping

Senior VP, Commercial Lending
M&T Bank

Josh Farrelman

Associate Vice President for the Office of Government and
Community Relations
University of Rochester

Ken Glazer

Chairman
Buckingham Properties

Andy Gallina

President
Gallina Development Corporation

Melissa Gardner

Chief Population Health Engineer Officer
Excelsus BlueCross BlueShield

Francis L. Gorman III

Senior Counsel
Harris Beach PLLC

Ken Hall

CFO
Riedman Companies

Dr. Hao Zhang

VP, Economic Development Corporation
Urban League of Rochester

Bob Healy

President
LaBella Associates, P.C.

Kate Karl

Partner, Chair of Banking/Real Estate Groups
Underberg & Kessler LLP

Ben Keller

Partner
Real Estate Development & Finance Group, Woods Oviatt
Gilman LLP

Paul Kremp

General Manager
Holiday Inn Downtown Rochester

Peter Landers

Managing Member
Landers Management LLC

Eugenio Marlin

President & CEO
Ibero-American Development Corp.

Ebony Miller-Wesley

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Dr. Art Papier

Co-Founder & CEO
VisualDx

Nayan Patel

Owner
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Michael Pietropaoli

Vice President Senior Relationship Manager
KeyBank

Kelly Pronti

Partner
Harter Secrest & Eney LLP

Andy Raus

Senior Vice President
Bergamann Associates

Rachel Roberts

Director, Institute for Music Leadership
U of R / Eastman School of Music

Roseann Schmid

CEO
Fisher Associates

Naomi Silver

President, CEO & COO
Rochester Red Wings

Steve Webster

Owner
Webster Properties

Dawn Williams-Fuller

Owner
Ambassador Union Street, LLC

MISSION STATEMENT

RDDC drives economic vitality in Downtown Rochester through innovation and collaboration

Become A Member

Join Our Mailing List

BUSINESS

LIVING

INVESTMENT

INNOVATIONS

NEWS

EVENTS