

Nederland Area Market Analysis and Action Plan

**Final Report
October, 2004**

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prepared for
The Nederland Area Chamber of Commerce
by
Progressive Urban Management Associates, Inc.

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I. EXECUTIVE SUMMARY

The Town of Nederland is located 17 miles west of Boulder. An historic mining town founded in 1874, Nederland is the center of a vast 225 square mile market area with about 5,000 residents. Within a half hour drive of Colorado's explosive Front Range market, Nederland aims to retain its unique small town and mountain lifestyle – a recreational gateway surrounded by national forests and striking mountain scenery.

Despite its many attributes, Nederland has struggled financially in recent years. Factoring for inflation, community sales tax receipts have been nearly flat or declining since 1990. Each year, community leaders are faced with more difficult budget decisions as local resources erode despite a growing population and increasing demands on the town's infrastructure. To develop a pro-active response to the community's challenges, the Nederland Area Chamber of Commerce commissioned the "*Nederland Area Market Analysis and Action Plan*" in 2004. Denver-based Progressive Urban Management Associates was selected to guide the Chamber and the Nederland community through the market assessment. Objectives of the project included:

- Identify opportunities to improve and sustain Nederland's business districts and help individual businesses prosper.
- Create a niche strategy that strengthens Nederland as a unique destination.
- Strengthen marketing, business development and management programs.
- Engage property owners, businesses, residents and civic leaders in a participatory process that builds a shared vision for the future.

Through the spring and summer of 2004, more than 150 Nederland stakeholders

participated in interviews, focus groups, a Town Hall meeting and a Project Task Force to develop the plan. An additional 410 market area residents responded to a community attitudes survey. The market analysis included a comprehensive economic profile and a retail leakage analysis. The following conclusions were reached:

- Nederland has tremendous potential to capture resident and visitor markets.
- Nederland area residents frequent local businesses.
- Despite this potential, sales tax revenues continue to erode.
- Nederland is handicapped by a perception of poor quality and customer service.
- Current business practices in the town perpetuate negative stigmas.

In summary, we found that Nederland has not adapted to significant changes in

its markets – Nederland appears to cater to a one-dimensional market in a multi-dimensional marketplace. The challenge is to reposition Nederland to become more relevant to its immediate market opportunities, yet retain some of the character and flavor that makes the place unique. Our recommended niche strategy is:

Nederland is the recreational gateway to the Indian Peaks, a free-spirited mountain town that offers a welcoming, relaxed and intimate atmosphere.

To capitalize on this strategy, the Action Plan provides recommendations in three key areas which are explored in depth in the report, including:

1. Improve the shopping and dining experience for the locals.
2. Strengthen marketing channels for visitor markets.
3. Create a funding mechanism to finance a downtown facelift.

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II. ECONOMIC PROFILE

Background. Nederland, Colorado, elevation 8,233', is 17 miles west of and 3,000 feet above the city of Boulder. Native Americans hunted and traveled through the area long before the arrival of the first white homesteaders in the mid-19th century. The town, previously known as Dayton, Brownsville and Middle Boulder, was named Nederland upon its incorporation in 1874, after the Mining Company Nederland from Holland purchased the Caribou Mill in Middle Boulder. Miners referred to the mill as "the Netherlands" meaning "low lands" in comparison to the nearby town of Caribou at 10,000" elevation. Although area history was built upon gold, silver and tungsten mining, these fortunes gradually faded. The Nederland area has become a destination for outdoor recreation, and for those seeking the beauty of the mountains for a few hours or a lifetime.

An analysis of area visitors, residents and employees provides the most accurate description of the target markets that will be generating the demand for the business products and services and amenities in the Nederland area.

The following analysis is based upon recent data compiled for Boulder County, the market analysis area, defined as a 224 square-mile area that roughly approximates school district attendance boundaries, and the Town of Nederland. Nearby communities include Central City and Black Hawk to the south, Ward, Jamestown and Gold Hill to the north and east, and Eldora to the southwest (Figure 1).

Figure 1: Nederland, Colorado and Surrounding Areas

source:
Mapquest

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The town of Nederland covers 1.5 square miles of land area, with an average of 910 persons per square mile (Figure 2). An estimated 5,500 persons lives within the market analysis area.*

*source: 2004 MapInfo Corporation

**Figure 2:
Town of Nederland, Colorado**

source: Mapquest

Residents. According to the 2000 Census, Nederland residents tend to be younger, with a higher percentage of males to females, and more homogeneous than Boulder County and the region (Figure 3).

**Figure 3:
2000 Demographic Summary: Town of Nederland**

<i>source: 2000 Census</i>		
Nederland		Boulder County
Median Age	32.8	33.4
Gender		
Male	53.2%	50.6%
Female	46.8%	49.4%
Race and Ethnicity		
White	97.1%	88.5%
African American	0.2%	0.9%
American Indian	0.4%	0.6%
Asian	0.4%	3.2%
Other	0.6%	4.7%
Hispanic Origin	1.6%	10.5%

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46.6%, or almost half of Nederland residents are in the 25 to 44-year age cohort, while only 4.1% are 65 years and over, in comparison to Boulder County, where 33.6% of residents are 25 to 44 year olds, and 7.8% are age 65 and older. 12.4 % of residents in Nederland and Boulder County are und 10 years of age (Figure 4).

**Figure 4:
2000 Age Distribution: Town of Nederland**

source: 2000 Census

0%5%10%15%20%25%under 1010 to 1920 to 2930 to 3940 to 4950 to 5960 to 6970 to 79over 80

Recent estimates show Nederland's population growing 7.4% between 2000 and 2003, compared to a 27% increase in the decade between 1990 and 2000. These estimates also show 637 households in Nederland, or an increase of 5.1% from 606 occupied housing units in the 2000 Census. The 2000 Census showed that 62.5% of housing units were owner-occupied, 10.2% of total units were vacant, and that 7.3% of those were considered seasonal or occasional use (Figure 5).

**Figure 5:
Population and Households: Town of Nederland, 1990 - 2003***

sources: DRCOG, 2000 Census, US Census Bureau								
Population	% Change	Households	% Change	Household Size	% Change	Housing Units	% Change	
1990	1,099	-9.4%	463	-13.3%	2.37	+4.4%	585	-12.9%
2000	1,394	+26.8%	606	+30.9%	2.30	-2.9%	675	+15.4%
2003	1,497	+7.4%	637	+5.1%	2.35	+2.2%	724	+7.3%

*January

Nederland Boulder County

5
1st

Housing. 2000 median gross rent in Nederland was \$758.00, with a rental vacancy rate of 2.2%. The 2003 average monthly rental for a 2 bedroom, 1 bath unit in Boulder County was \$996.63*. Figure 6 represents sales of 218 single-family homes in zip code 80466 between January 1, 2001 and May 30, 2004. Median housing sale prices rose by 9.2% between 2002 and 2003. The 2003 average cost of a single-family home in Boulder County was \$272,833.** A long-time Nederland REALTOR© identified the typical person who purchases a home in Nederland, as in his or her late 20's to mid 40's, and a Colorado native from Boulder, Golden or Denver seeking a larger house in the mountain environment.

* Denver Area Apartment and Vacancy Survey

**Metrolist, 2003

**Figure 6:
For Sale Housing Activity: Zip Code 80466, 2001 to May, 2004**

source: Boulder County MLS					
Total Units Sold	Average Sale Price		Median Sale Price	Highest Sale Price	Lowest Sale Price
2001	67	\$345,000	\$299,000	\$1.4 million	\$102,500
2002	61	\$344,000	\$299,500	\$1.3 million	\$131,000
2003 Thru 5/04	54 36	\$370,000 \$345,700	\$327,000 \$308,000	\$1.25 million \$585,000	\$115,000 \$170,000

**Figure 7:
2000 Income Distribution: Town of Nederland**

<i>source: 2000 Census</i>		
Nederland		Boulder County
Less than \$24,999	22.9%	19.7%
\$25,000 to \$49,999	26.5%	24.5%
\$50,000 to \$74,999	21.3%	20.5%
\$75,000 to \$99,999	11.4%	13.6%
\$100,000 to \$149,999	10.4%	13.3%
More than \$150,000	7.5%	8.4%
Median Household Income	\$50,588	\$55,861
Per Capita Income	\$29,111	\$28,976

Education. 59.4% of Nederland’s population over 25 years of age has earned a bachelor’s degree or higher. Two public schools are located in Nederland. Nederland Middle/Senior High School, with a 2003-04 enrollment of 384 students is Boulder Valley School District’s only 6-12 school. Colorado Student Assessment Program (CSAP) tests, statewide assessments designed to measure student achievement, report Spring 2004 results for Nederland Middle/Senior High School 10th graders as follows: Reading, 76% proficient or above, mathematics, 31% proficient or above, and writing, 50% proficient or above. Nederland Elementary School, 2003-04 enrollment 270, reports 5th grade 2004 CSAP results of 58% proficient or above for math, 80% proficient or above for reading and 60% proficient or above for writing.

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Access/Transportation. Highway access to Nederland is via state highway 72, often referred to as the Peak to Peak Scenic Byway, and state highway 119, also known as Boulder Canyon Drive. Residents and visitors use the roads to commute, travel to area recreational opportunities, and to access gambling casinos in Central City and Black Hawk. Figure 8 illustrates annual average daily traffic for the two highways in and around the Town of Nederland.

**Figure 8:
State Highway Traffic Information for Town of Nederland, 2003**

<i>source: Colorado Department of Transportation</i>	
On State Highway 119 @	Annual Average Daily Traffic
Tilden Street	5,625
Boulder Street	6,494
Street	8,067
South of State Highway 72	5,598
East of State Highway 72	5,278
East Street	3,487

Average	5,758
----------------	--------------

On State Highway 72 @		Annual Average Daily Traffic
State Highway 119, south of town	1,071	
State Highway 119, in town	3,198	
Street Indian Peaks Drive	3,434	
	2,236	
Average		2,485

7
3rd
1st

Transit. The Regional Transportation District (RTD) has installed a new, 75-space park-n-Ride, with usage averaging 45 cars per day. Route N bus service runs between Nederland and Downtown Boulder, an approximate 1/2 hour trip. Fourteen trips each way are made daily during weekdays, and on Saturday and Sunday, ten and nine trips each way respectively, are made on a daily basis. RTD operates seasonal selected trips to Eldora Mountain Resort from mid-November to mid-April. Average daily ridership trends gathered from farebox (bus driver-generated) estimates are represented in Figure 9.

**Figure 9:
2003 RTD Average Daily Bus Ridership - Route N**

source: Regional Transportation District



0,000 = annual average
daily traffic

Weekday Saturday Sunday

average daily ridership

8

Figure 10:

<i>source: Regional Transportation District</i>					
Thursday May 15, 2003 (28 trips)		Nederland to Boulder		Boulder to Nederland	
On		Off		Bus Stop Total	
Nederland High School	12		18		30
Eldora Rd. @ Hwy 119	3		5		8
Nederland park-n-Ride	87		48		135
Hwy 119 @ Hwy 72	2		38		40
Hwy 119 @ St. Hwy 119 @ East St./Stinky Gulch Rd.	4		5		9
Total for Nederland Stops	0		4		4
	108		118		226
Total Daily Route Ridership			486		

2003 RTD Bus Ridership – Route N Bus Stops in Nederland, All Day

Saturday June 14, 2003 (20 trips)		Nederland to Boulder		Boulder to Nederland	
On		Off		Bus Stop Total	
Nederland High School	1		0		1
Eldora Rd. @ Hwy 119	1		0		1
Nederland park-n-Ride	48		50		98
Hwy 119 @ Hwy 72	0		27		27
Hwy 119 @ St. Hwy 119 @ East St./Stinky Gulch Rd.	3		5		8
Total for Nederland Stops	0		0		0
	53		82		135
Total Daily Route Ridership			284		

Sunday May 11, 2003 (18 trips)		Nederland to Boulder		Boulder to Nederland	
---	--	-----------------------------	--	-----------------------------	--

On		Off		Bus Stop Total
Nederland High School	2		3	5
Eldora Rd. @ Hwy 119	0		3	3
Nederland park-n-Ride	4		12	16
Hwy 119 @ Hwy 72	0		21	21
Hwy 119 @ St. Hwy 119 @ East St./Stinky Gulch Rd.	27		1	28
Total for Nederland Stops	7		1	8
	40		41	81
Total Daily Route Ridership			166	

RTD's Ridecheck program provides even more accurate route ridership data generated by counters who ride on selected bus routes all day long. Figure 10 shows daily weekday, Saturday and Sunday ridership trends for spring, 2003 Route N stops situated in Nederland. The Nederland park-n-Ride, and stops on State Highway 119/Bridge Street at 1st Street and State Highway 72 adjacent to the roundabout appear to be the most-utilized throughout the week. Nederland riders represent a little over half of all route passengers on weekdays and weekends.

9
1st
1st
1st

The 2000 Census indicates that Nederland has one of the highest rates of transit usage in the metropolitan area (Figure 11).

**Figure 11:
Nederland Commuting to Work in 2000**

source: 2000
Census

Drove alone Car Public Transpor Worked at home Motorcycle/Bicycle Other means Walked pooled tation

Employment. The service sector, including arts, recreation and entertainment, hotel and food services make up over 54.6% of Nederland jobs by industry. Education, health and social services represent 21.1%, of service sector employment. The retail trade sector provides 13.1% of jobs. Combined retail and services sectors make up 67.7% of Nederland employment (Figure 12).

**Figure 12:
Nederland Employment by Industry**

source: 2000
Census

Transportation, Warehousing & Utilities 1.7% Agricultural & Mining 0.4% Construction 8.6% Finance, Insurance & Real Estate 2.4% Wholesale Trade 2.0% Public Administration 4.7% Manufacturing 8.1% Retail Trade 13.1% Information 4.3% Services 54.6%

Nederland

Metropolitan Denver WalkedOther meansBicycleWorked at homePublic TransportationCarpooledDrove alone

10

According to the 2000 Census, 23% of the 915 Nederland workers over 16 years of age work in their place of residence. Commuting to work data show that 6.1% of these work remotely from home. Zip code 80466, the wider area, had 11.5% of nearly 2,000 workers working in their place of residence, with commuting to work data showing that 8.5% of these work remotely from home. Additionally, 2000 Census place of work data for 80466 demonstrates that 85.1% work in Boulder County, 12.6% work outside of Boulder County, and 2.3% work outside of Colorado. Home- and internet-based service businesses appear to be a significant part of the Nederland economy. Figure 13 represents just a sampling of area home- and internet-based businesses that are members of the Nederland Area Chamber of Commerce.

**Figure 13:
Nederland Area Chamber of Commerce
Member Internet-Based and Home-Based Businesses**

<i>source: Nederland Area Chamber of Commerce</i>	
Business Type	Number of Businesses
Arts and Entertainment	6
Finance, Insurance and Real Estate	4
Health Services	4
Animal Services	3
Business Services	2
Computer Services	2
Recreational Services	1
Home Building/Design	1
Legal Services	<u>10</u>
Miscellaneous Services	35
Total Businesses	

Figure 14 illustrates the anecdotally known largest employers, which are from primarily government and education sectors. Number of employees per business in the Nederland area is unknown. The year-to-date Boulder County unemployment rate through March, 2004 was 4.9%, down 1.3% from the year-to-date unemployment rate of 6.2% during March 2003. Metropolitan Denver rates for the same periods were 5.8% and 6.5% respectively.*

*Colorado Department of Labor and Employment

**Figure 14:
Nederland Area Major Employers**

<i>sources: various</i>	
Business	Business Type

Ace Hardware	retail hardware store
B & F Mountain Market	retail grocer
Boulder County Government	government (transportation department)
Boulder Valley School District	education district
Colorado State Government	government (transportation department)
Eldora Mountain Resort	ski resort (seasonal)
Town of Nederland	government
TESCO	plastics – molding
United States Government	government & forest service (seasonal)

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Retail Sales Tax Collections. Nederland’s sales tax rate is 3.75%, with 2% allocated to the General Fund for government operations, 1% to the Utility Fund for water and sanitary sewer services and the remaining .75% allocated to the Community Center Fund. Nederland’s 2004 mill levy of 14.590 reflects a temporary reduction of 2.684 mills. Figure 15 illustrates neighboring community, school district, town and special district taxes.

**Figure 15:
2004 Local, State and Property Taxes in Boulder County**

<i>sources: Colorado Department of Revenue, Boulder County Assessors Office</i>		
Sales Tax		Mill Levy
Nederland	3.75%	14.590 mills
Lafayette	3.5%	10.832 mills
Superior	3.46%	8.805 mills
Louisville	3.375%	6.710 mills
Boulder	3.26%	9.860 mills
Lyons	3.0%	13.081 mills
Longmont	2.95%	13.420 mills
Ward	2.0%	2.616 mills
Jamestown	*	14.680 mills
Boulder County**	2.9%	20.088 mills
Boulder Valley School District**	.55%	38.255 mills
Boulder Valley School District**	0.6%	11.434 mills
Nederland Fire Protection **	0.1%	2.061 mills
Nederland Library District**		
State Sales Tax		
Boulder County Tax RTD Cultural Facilities		

District Football Stadium District		
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**not available*

*** 2003 levies*

An analysis was made of 2000 Census data for four zip codes and select towns found within the market area. The zip codes are 80455, 80466, 80474, and 80481. Figure 16 illustrates available characteristics for the towns and constituencies within this market area.

**Figure 16:
Town of Nederland and Market Area**

<i>sources: DRCOG, 2000 Census</i>						
Populat ion	Household Size		Median Age	Owner Occupied Housing Units	Housing Units for Seasonal Use	Median HH Income
Eldora	170	1.91	37.7	61.8%	59.6%	\$51,875
Gold Hill	210	2.33	39.8	70.0%	16.7%	\$48,750
Hill	191*	2.14*	38.8	70.8%	3.9%	\$48,750
Jamestown	171*	2.38*	34.7	71.8%	7.3%	\$67,500
Ward						\$33,750
Nederland	1,497*	2.35*	32.8	62.5%	7.9% \$	50,588

**January 1, 2003 estimates*

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Eating and drinking establishments make up one half of Nederland's retail offerings. Area towns including Ward, Jamestown, Wondervue, Rollinsville, and Eldora look to Nederland for necessities and entertainment (Figure 17).

Figure 17: Existing Retail in Nederland and Market Area

source: Town of Nederland, PUMA survey

Nederland		Other Market Area
Eating & Drinking Establishments	14	5
General Merchandise	4	3
Apparel & Accessories	3	-
Building Materials	2	1
Furniture & Office Equipment	2	-
Food & Beverage Stores	2	2
Automotive & Aftermarket	1	1
Total Retail Outlets	28	12

Nederland sales tax revenues showed steady increases through 2001, decreasing by roughly 3% annually through 2003 (Figure 18).

Figure 18:
Nederland Sales Tax Revenue - 1998 to 2003*

source: Town of Nederland

\$500,000 \$550,000 \$600,000 \$650,000 \$700,000 \$750,000 1998 1999 2000 2001 2002 2003

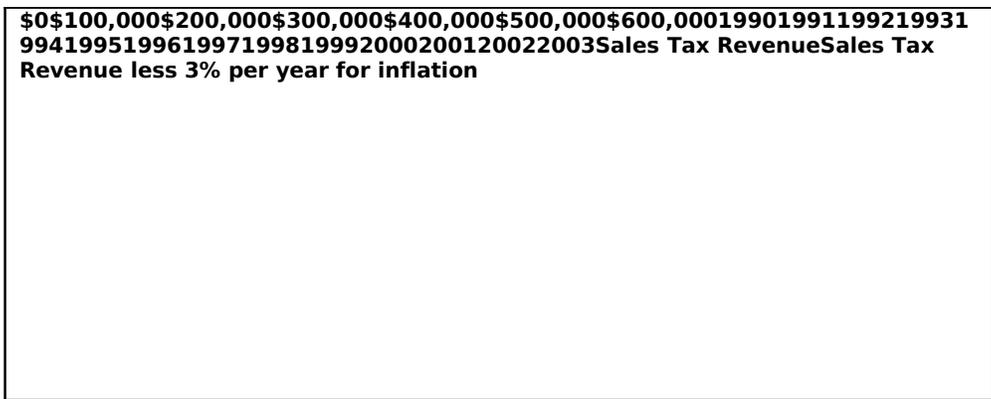
*annual figures include 20% Community Center Increase

By removing the effects of inflation (3% per year) Figure 19 illustrates relatively flat sales tax revenue trends from 1990 and 2003.

13

Figure 19:
Nederland Sales Tax Revenue Adjusted for Inflation - 1990 to 2003

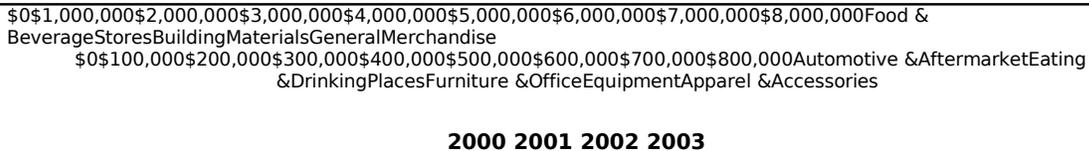
source: Town of Nederland



Food and beverage sales, building materials and general merchandise sales account for most consumer spending in Nederland, followed by automotive, restaurants and bars, furnishings and apparel/accessories. Food and beverage sales declined 13.7% between 2002 and 2003 after steady increases in previous years, Automotive and aftermarket sales have declined since 2000, dropping by 47.5% in 2003, while apparel and accessories sales increased by 72.2% between 2000 and 2003 (Figure 20).

Figure 20:
Town of Nederland Annual Gross Retail Sales by Category, 2000 to 2003

source: Town of Nederland



14

The town of Nederland and the surrounding area offer a variety of amenities, events and attractions to the community and to visitors (Figures 21-25).

Figure 21:
Nederland Amenities and Attractions

sources: various

Nederland Historical Museum/Nederland Mining Museum- visitors can learn what life was like for miners and their families at the turn of the century. The Mining Museum opened in Summer, 2004.

Nederland Community Library - a source of local history materials and free internet access has 14,300 customer visits per year

Youth and Family Center - offers educational programs, and activities for area youth, their families and the community. The Center saw 11,794 total visits during 2003, with 3,753 youth and family visits and 8,041 teen visits (an average of 30 teens per day)

Nederland Post Office* - a vital community component, serving summer tourism and skier traffic during the winter. Busiest season starts in late September through the Christmas and New Years holidays.

**transaction data for internal USPS use only*

Nederland Visitors Center - has complete information about nearby state and national parks, places to stay and eat, maps of the area, hiking destinations, campgrounds and wilderness area regulations, and local events. Visitors Center volunteers on a daily basis tally guests, with annual data shown in Figure 23. Many people who visit Nederland do not come into the Visitors Center, and are unrepresented by the numbers below. Guest book signatures rank Colorado, Texas and the Netherlands consistently as the top three visitor places of origin.

Figure 22:

Nederland Visitors Center Guests - 1991 to 2003

source: Nederland Chamber of Commerce

05,00010,00015,00020,0001991199219931994199519961997199819992000200120022003

15

2004 Events Participation. Nederland hosts unique special events, including the Nederland Music and Arts Festival, and the Backdoor Theatre, which presents theatrical productions and first run movies on the weekends.

Miner's Day and Old Timers Celebration - 1,500

Frozen Dead Guy Days - 3,000

Summertime Fun Fair and Artisan Show - 1,500

Neder-Nederland 5K & 10K Races* - 1,000

**2003 estimate*

Figure 23:

Nederland Area Attractions

sources: various

Peak to Peak Scenic Highway - established in 1918, this is Colorado's oldest scenic byway, a 55-mile drive that ties together Rocky Mountain National Park on the north and Golden Gate Canyon State Park to the south. The road provides spectacular views of the Continental Divide,

passing through Nederland, Lyons and Estes Park. An estimated 1.8 million vehicles travel the route annually.

source: Colorado Department of Transportation

Central City/Blackhawk – former gold mining towns located south of Nederland, currently homes to limited stakes gaming. In 2003, approximately 72% of the state’s bets were placed in Black Hawk’s twenty-two casinos, compared to 7% in Central City’s five gambling halls. Cripple Creek’s seventeen casinos in southern Colorado drew the balance of the \$689.3 million netted in revenues in 2003.

Ghost Towns and Old Mining Camps – Caribou, Hessie, Tungsten and the Fourth of July are abandoned former mining towns surrounding Nederland. The Caribou mine is still being worked. Tolland and East Portal were the first two railroad settlements along the Moffat Railroad west of Denver, built to support tourism and housing of Moffat Tunnel workers, respectively. Eldora, Gold Hill, Rollinsville, and Ward were former mining towns that exist today as quiet communities of a few hundred residents each.

Arapaho-Roosevelt National Forests, Pawnee National Grassland – The national forests surround Nederland, encompassing 1.5 million acres extending north to the Wyoming border, south of Interstate 70 to Mount Evans, west across the Continental Divide to the Williams Fork area, including short grass prairie east of Interstate 25. On national forest land, Rocky Mountain National Park, the Peak to Peak Scenic Byway, Eldora Mountain Resort, and the Indian Peaks Wilderness Area offers opportunities for hiking, camping, biking and many other activities. Figure 24 details basic descriptors of recreational visitor use on Forest Service-managed land during 2000.

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**Figure 24:
2000 Visitor Use, Arapaho-Roosevelt National Forests**

source: USDA Forest Service

Visits	6.2 million*
Gender	65.8 % male
Age Distribution (largest groups)	22.8%
31-40	21.5%
41-50	16.8%
Under 16	93.7% white
Race/Ethnicity	34.9% Front Range
Zip code of visitors	2.9 persons
Average number of people per vehicle	23.5 hours
Average length of stay for visit	\$350.24
Average per person expenditure on a visit*	

* Rocky Mountain National Park generated 2.9 million visits during FY 2003

**within 50-mile radius of forest recreation site – may include visits to other areas,

includes lodging, food/drink, transportation, activities, fees, and souvenirs)

Eldora Mountain Resort – Since 1962, Eldora has offered the closest skiing to Denver and Colorado’s Front Range. Base elevation 9,300 feet, 10,800 feet at the summit with 53 trails on 680 acres of skiable terrain and 12 lifts. Eldora is accessible by RTD public transit, which runs through Nederland, only three miles away, on a seasonal basis. Ski visits to Eldora have increased steadily since the 1993 – 1994 season, with 2002 – 2003 season visits up 14.6% (286,528 skier visits) over the previous season. Figure 25 illustrates the distribution of skier visits by Colorado county from a recent geographic analysis of Eldora databases. 11.3% of visits were from out of state or outside of the United States, underscoring Eldora’s Front Range draw and lack of “bed base”.

Figure 25:

2003 – 2004 Colorado Skier Distribution, Eldora Mountain Resort

source: Eldora Mountain Resort

Percent of visitation by county

67.4%

4.1% - 8.2%

1.1% - 3.5%

0.6%

0.1%

LEGEND

17

III. COMPETITION AND LEAKAGE ANALYSIS

The preceding economic profile reveals the demographic trends of the market area. As a part of the market analysis, it must be determined if demand for certain types of retail uses are being met within the trade area. Determining this is difficult because of the small size of the market area and the confidential nature of some of the information necessary for a completely accurate analysis. For this reason, P.U.M.A. relies on primary field research as well as secondary information sources to evaluate the existing commercial supply.

Supply of Retail Space: During July 2004, P.U.M.A. undertook a field survey of existing retail uses within the market area. The P.U.M.A. survey inventoried over 111,000 square feet of retail space, i.e. retail stores and services, within the market area, which is defined as the 224 square-mile area that roughly approximates school district attendance boundaries. Professional service space, i.e. legal, accounting, real estate, etc., was not included in the inventory. The communities of

Eldora, Gold Hill, Jamestown, Rollinsville, Ward and Wondervu are contained within the market area (Figure 26).

**Figure 26:
Concentration of Retail Space: Nederland Market Area**

<i>source: P.U.M.A. Survey</i>		
Retail Node	Retail Sq. Ft.	% of Market
Nederland	93,600 sq. ft.	84.0%
Other Market Area*	17,800 sq. ft.	15.9%
Total Market Area	111,400 sq. ft.	

**includes Eldora, Gold Hill, Jamestown, Rollinsville, Ward, Wondervu*

Leakage Analysis. Using the preceding fieldwork, industry average standards and statistics on average household expenditures in the area, a retail sales leakage analysis was conducted, revealing that the area could support approximately 130,000 additional square feet of retail space. The leakage analysis shows that, according to industry standards, utilizing sales per square foot adjusted by 75% of neighborhood centers, a market demand of \$57.4 million, estimated sales of \$22.9 million with an estimated market gap of \$34.5 million, or that 60.2% of expenditures prior to adjustments for normal leakage, are leaving the Nederland market area.

Because of the necessity to use several different sources of data in an analysis such as this, there is bound to be error when the results are brought down to a detailed level. While it is dubious to claim that the exact amount of square footage or annual sales are assigned to each category, it is possible to isolate distinct trends and general retail categories that are underserved in this market. Summary tables in Appendix A provide the detail of the leakage analysis.

The market area appears balanced in most categories, including automotive repair and maintenance, eating and drinking places, food and beverage stores, gasoline service stations, general merchandise/gifts, health care supplies, household furnishings and household repairs and maintenance (hardware stores).

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Retail types that appear to be underserved include:

- Apparel and accessories

- Entertainment (Non performance – see definition below)

Recurring open-ended suggestions for improvements to the two above existing retail types from the recent Nederland Area Improvement Survey are as follows:

Apparel and accessories

- Children’s clothing

- Apparel basics, i.e. shoes, undergarments, socks, etc.

Consignment and thrift stores

Entertainment

Art galleries and craft-related stores

Music, i.e. recorded music, musical instruments

Sporting goods (including mountain outfitter)

In addition, the notion of “family-friendly” retail and entertainment was a recurring theme in community interviews and the survey. According to Nederland gross retail sales collections data, apparel and accessories sales grew 72.2% between 2000 and 2003. The entertainment category, as defined for the purposes of this analysis, includes audio/video materials, sporting goods and recreational supplies, fitness studios, pets, and hobbies. It is duly noted that many of Nederland area eating and drinking establishments provide live entertainment, which is not broken out of the eating and drinking places category in the leakage analysis.

In addition to that which is mentioned above, information on consumer expenditures in the personal services category is lacking from the available data, i.e. banks, beauty/barber shops, etc.

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IV. STAKEHOLDER PRIORITIES

In order to understand the critical issues, prevailing market dynamics and priorities in the Town of Nederland, an extensive outreach process was undertaken designed to encourage the participation of as many interested Nederland-area stakeholders as possible. The outreach included interviews and focus groups with business, community and civic leaders and totaled more than 150 participants. The outreach process included:

- Individual interviews with approximately 75 residents, community and business leaders, town staff and elected officials.
- A community meeting that attracted more than 50 attendees;
- A 17-member steering committee that oversaw and guided the planning process;
- A series of five industry-specific focus groups with 32 representatives including retail, restaurant, home-based, non-profit and professional services.

A complete list of all the outreach participants is attached as Appendix B.

The stakeholders expressed several common concerns and priorities for the town and its potential improvements. Following is a summary of the feedback from the various groups:

Individual Interviews

Individual interviews were held with more than 75 community, civic and business leaders. The prevailing themes from the individual interviews included:

- **Physical Improvements.** The issue at the forefront of most

interviewees' minds was the need for capital investment to improve the aesthetics and pedestrian mobility in Nederland. The most frequently mentioned improvements were:

- A downtown gathering space/town square
- Sidewalks and crosswalks in town
- Create a welcoming visual gateway to town by moving the propane tanks and sewer ponds from the town's "front door"
- Enhanced trails to improve the relationship between town, the creek and the reservoir
- Active recreational uses on Barker Reservoir
- Infill vacant commercial sites, especially along 1st Street

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- **Marketing.** Interviewees indicated there are currently few active town marketing efforts in place, and anecdotal evidence suggests tourists visiting Nederland usually "stumble upon" it due to its proximity to outdoor amenities and the Peak-to-Peak highway. Stakeholders would like to see a concerted marketing effort to capitalize on Nederland's natural beauty, historic appeal and easy access from Denver and Boulder. Several business owners also expressed an interest in pursuing collaborative marketing efforts between the outdoor industry, retail and restaurants.

- **Signage & Wayfinding.** Many outreach participants are dissatisfied with the lack of signage along Highways 119 and 72. At a minimum, stakeholders would like to see signage alerting travelers that Nederland is ahead and that there are a variety of amenities in town. It was also noted signage in town directing visitors to parking, attractions and retail lacks visibility and uniformity.

- **Regulatory Environment.** Several stakeholders mentioned regulations such as the building code, a cumbersome development process and historic façade requirements may discourage new building as well as renovation of existing buildings.

- **Lack of Year-Round Activities.** Many of the people interviewed expressed frustration that there is little entertainment for children or adults in town on a year-round basis. A carousel, ice skating rink and recreation center were all ideas offered by stakeholders.

- **Balancing Ned's Future.** Stakeholders across the board expressed their affinity for Nederland, its beautiful natural surroundings and small-town values and appeal while also recognizing the need for a more proactive approach to ensuring economic sustainability for the area. Maintaining Nederland's character while striving to attract more investment are dual goals of the large majority of stakeholders involved in the outreach process.

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Community Meeting

More than 50 people attended a community meeting held in April 2004. Participants were asked to outline what they thought were Nederland's strengths, weaknesses and what kinds of improvements they would like to see. Below is a summary of the major points that were discussed.

Nederland Strengths

- Unique scale & character(s), Individualism
- Unpretentious, rustic, personable
- Sense of history
- No chains – mostly owner-operated businesses
- Boulder Creek
- Small town feel – compact
- Friendly, casual
- Adequate, easy parking
- Safe, peaceful mountain setting
- Intellectual capital
- Loyal residents
- Tolerant
- Ski area, reservoir, wilderness
- No traffic signals
- State highway traffic

Nederland Weaknesses

- Main road is state highway, traffic too fast
- Lack of pedestrian access – sidewalks, curbs, crosswalks
- Infill “missing teeth”
- Inadequate signage/gateways
- Overhead wires
- Codes – hassles/2003 IBC for old buildings
- Easy to get pulled over
- Lack of town square/anchor/place to hang out
- Limited retail choices – higher prices
- Lack of definition, landscaping, underutilized creek
- Propane farm at town entry
- Inconsistent customer service
- Lack of youth services
- Lack of lodging
- Professional space replacing retail space
- Barker is not a recreation area
- Need trail and landscape plan

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Nederland Improvements

Participants in the community meeting were asked to brainstorm recommended improvements for the town and then prioritize them. The ideas below are listed in order of priority (with the highest priorities listed first).

Improvement No. of “dots” (prioritized)

Town Square – gathering spot	15
Active use on Barker Reservoir	10
Trail and landscape plan	10
Gateway improvements	7
Infill vacant spaces	7
Clean up town – more maintenance	7
Install sidewalks, pedestrian improvements	7
Cell phone coverage	6
Improve town info resources: radio, cable	4
Improve creek use	3
Cooperative resource for home businesses	3
More evening activities for adults	3
Add carousel & fun things to do	3
Improve visitor information	3
Bury power lines	3
New community center	2
Mining museum	2
Localize and improve development process	2
Extend transit time/tipsy taxi	2
Build on intellectual capital – think tank	2
Hire town manager	1
Improve Rental Way-bank intersection	1
Balance resident/events needs re: noise	1
Initiate sister city project with Holland	0*
Food available after 10:00 pm	0*
Build on artist community	0*
Convene seminars on recreation	0*
Capitalize on renewable energy niche	0*
* Idea mentioned as priority but no resources, or “dots” were allocated toward it.	

Steering Committee

A 17-member steering committee comprised of Nederland area community and business leaders was also asked to brainstorm potential Nederland improvements and then prioritize the results. The steering committee roster is attached as Appendix C.

Improvement No. of times mentioned

Increase retail offerings	6
Create jobs – local and home based	5
Increase pedestrian traffic, access and maintenance	4
Improve and cleanup gateways/first impressions	4
Improve town/chamber relations	3
Bury power lines	3
Develop vacant commercial land	2
Capture more local \$/ increase sales	2
Upgrade commercial area visually	2
Communicate visitor attractions/things to do	2
Improve signage/information distribution	1
Improve awareness of outdoor recreation opportunities	1
Create affordable housing	1
Capture drive-through traffic	1
Attract investment	1
Put bad blood aside	1
Create and market signature seasonal activities	1
Create quick & easy parking	1
Boulder – Ned transit should be more frequent	1
Create more youth activities	1
More business training/merchandising	1

Industry-Specific Roundtable Discussions

A series of roundtable discussions were held with five different business segment groups: retail, home-based businesses, non-profit groups, professional services and restaurants. Following are the major points that emerged from each of the roundtable discussions.

Retailers

Nederland area retailers expressed the following points:

- Signage and marketing to attract visitors to Nederland is practically non-existent
- Lack of commercial space available in town
- Current retail mix is relatively healthy, although there is room for improvement
- Regulatory environment is highly restrictive as to signage, paint color, historic façade requirement
- Retailers should create incentives to have locals shop in town as opposed to going to Boulder or other places
- Town identity should be small, quirky, arts & music, mining, emphasize gateway to Indian Peaks Wilderness

Home-Based Businesses

Nederland is home to a healthy mix of home-based businesses.

Common themes that emerged from this group included:

- Home-based businesses based in Nederland because of its small town ambience, strong community, affordable, close to Boulder, high speed internet access
- Business support growing through additional businesses, Chamber, networking
- Would like to see greater retail mix, especially kids clothing shop, music store as well as year-round attractions and a developed lakefront
- Town identity should be: Gateway to outdoors, “Meet at Ned”, professional, home based enclave

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Non-Profit Organizations

Nederland has an unusually large and diverse collection of non-profit organizations for a town of its size. Following are some points made by members of the non-profit community:

- Non-profits support strong Nederland community values
- Great deal of fundraising competition within the community – lots of competition for small pool of supporters
- Perhaps establish one collaborative fundraising effort similar to the United Way
- Town identity should be: gateway to wilderness, mining
- Market town and businesses through town anchors including library, visitor center, teen center, town hall
- Would like to see: horse-drawn tours, walking tours, boating on

Barker, better open space and outdoor amenities

- Effective Nederland-area communication system to incorporate disengaged members of community

Professional Services

Professional service providers including builders, a landscape architect, hair stylist, auto mechanic and paralegal made the following observations:

- Front range market is accessible and should be pursued
- Permitting issues makes business difficult and restrictive
- Want to see improvements: face lift on 1st Street, landscaping, facades, town square, better pedestrian environment
- Would like to see collaborative marketing efforts
- Town identity should be: a collection including mining, eclectic small town, open

Restaurants

Nederland has a diverse collection of restaurants. Their prevailing points were:

- Nederland’s is a highly seasonal market; much more active in summer than in winter
- Most restaurants market through word-of-mouth, no collaborative strategy
- Current image is that of hippy town, quirky, friendly
- Desirable image is independent, free-spirited
- Lack of connection and communication between “old town” Nederland and some of the outlying areas
- Group expressed eagerness to participate in collaborative marketing efforts

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V. NEDERLAND AREA COMMUNITY ATTITUDES SURVEY SUMMARY

As part of the Nederland Market Analysis, a direct mail survey was distributed to 3,678 Nederland-area households (including Nederland and the surrounding communities of Jamestown, Pinecliff, Ward, Rollinsville and Gold Hill) and was also published twice in the Mountain Ear newspaper. 410 surveys were returned, representing a return rate of 11%. Survey results and verbatim responses are attached as Appendix D.

Profile of Survey Respondents: Survey respondents were generally female (68%) residing outside of Nederland town limits (61%), and have been residents of the Nederland area for six years or more (68%). Survey respondents were primarily between the ages of 35 and 69.

PROFILE OF SURVEY RESPONDENTS	All Respondents (%)
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Length of Residence in the Nederland Area

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Less than one year	7
One to five years	25
Six to 10 years	19
More than 10 years	49
Gender: Female	68

Age

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18 to 24 years	1
25 to 34 years	16
35 to 49 years	39
50 to 69 years	38
More than 69 years	6

Area of Residence

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Downtown	9
Big Springs	10
Sunnyside/Hilltop	11
Other	9
Outside Nederland Town Limits	61

Frequency of Visits to Downtown: Respondents were asked how often they visit Nederland to shop, eat or do business. 80% of respondents indicated that they visit Nederland daily or once a week and only 2% indicated they visit once a year or less.

Frequency of Visits to Nederland	All Respondents (%)
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Almost daily	50
About once a week	30
About twice a month	8
About once a month	6
About four times per	4

year	
About once a year or less	2

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Activities or Businesses Visited regularly: Almost all survey respondents (90%) do grocery shopping in Nederland and 80% visit restaurants and/or bars, followed by 75% of respondents who visit the post office. Only 25% of respondents visit the library regularly and 11% go to Town Hall on a regular basis.

Activities or Businesses Visited Regularly	All Respondents (%)
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Grocery shopping	90
Other shopping	39
Restaurants and/or bars	80
Entertainment (live music, movies, etc.)	39
Library	25
Nederland schools and/or child care	20
Personal business (i.e. hairdresser, bank, gym)	42
Special events (music festivals, Frozen Dead Guy Days, etc..)	42
Post Office	75
Town Hall businesses	11
Outdoor recreation	52
Other	21

Of approximately 100 "Other" open-ended responses for activities and businesses visited regularly, those with repeat frequency included coffee houses, video rental and gas and auto needs as well as the Backdoor Theater.

Reasons for Not Visiting Nederland Businesses: Respondents indicated the biggest reason for seldom visiting Nederland businesses is because they commute to work and shop elsewhere (39%), followed by lack of services and products (36%) and perception of high prices (32%). *Surprisingly, only 3% of respondents indicated parking is a reason they seldom visit Nederland businesses. Likewise, only 3% indicated they seldom visit because it is difficult to get around.*

Reasons for Not Visiting Nederland Businesses	All Respondents (%)
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Lack of products/services	36
Perception of high prices	32
Limited parking	3
Difficult to get around/find stuff	3
Poor customer service	17
Lack of interesting things to do	8
Commute to work and shop elsewhere	39
Generally unappealing environment	15
Other	33

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Of approximately 120 open-ended “Other” responses for seldom visiting Nederland, the most frequently mentioned deterrent was a general dissatisfaction with customer service, cleanliness and attitude of various businesses, particularly the grocery store and restaurants. The second biggest deterrent mentioned was convenience; with several respondents indicating they live closer to Boulder than Nederland.

Other Business Districts Visited at Least Once a Month: 77% of the respondents visit Boulder for groceries and household goods at least once a month. Other frequently visited retail destinations include Costco, Walmart, Target and other “big box” stores. 34% of respondents do shopping online or via catalogues.

Other Business Districts Visited at Least Once a Month	All Respondents (%)
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Downtown Boulder/Pearl Street Mall	35
Boulder for groceries, household goods	77
Costco, Walmart, Target, other “Big Box”	66
Flatirons or other mall	16
Denver area	13
Online internet shopping or catalogues	34
Other	18

Of the approximately 75 “Other” open-ended responses, other shopping areas mentioned with frequency were Boulder, with almost as many respondents indicating they shop in Longmont. Also noted were Louisville, Arvada and Broomfield and Golden. Several respondents indicated they shop at McGuckin’s hardware in Boulder.

Improvements That Would Encourage More Visits to Nederland Businesses: More and diverse restaurants, an enhanced physical environment and a more welcoming atmosphere were the top

improvements that would encourage respondents to visit businesses more often. Notably, more respondents indicated live entertainment would *not* encourage more frequent visitation (52%) than would (48%).

	Improvements That Would Encourage More Frequent Visitation	No, Won't Encourage Me to Visit	May Encourage Me to Visit	Yes, Would Encourage Me to Visit
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More/different restaurants	26	47	27	
Unique, one-of-a-kind shops	37	47	16	
More household staples	38	47	15	
More/better recreational activities	44	34	22	
Enhanced physical environment	37	36	27	
Live entertainment	52	35	13	
Special events	48	40	13	
More welcoming atmosphere	40	40	21	
Better information on what exists	43	42	15	
Other	28	30	42	

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Open-ended suggestions were sought for improvements in each of the preceding categories. The following are some comments that were frequently mentioned:

- **Types of restaurants:** Of nearly 120 suggestions, 54 respondents indicated they'd like to see an Asian restaurant (most frequently mentioned was Chinese, followed by Japanese and then Thai), and 48 people indicated they'd like a Mexican restaurant. Other frequently mentioned points regarding restaurants included a desire for non-smoking venues, more kid/family friendly restaurants. Several respondents indicated they feel there is already a diverse mix of good

restaurants in Nederland.

- **Unique, one-of-a-kind stores:** Of approximately 80 suggestions, 27 respondents mentioned they'd like to see apparel, many mentioning kid's clothing, art was the second most frequently mentioned item followed by music and sporting goods.

- **More household staples:** Of approximately 60 suggestions, a larger grocery store with a wider selection of goods including more organic produce and drug store items was mentioned most frequently. Also mentioned were lumber, shoes and clothing.

- **More/better recreational opportunities:** Of approximately 90 suggestions, 33 respondents indicated they'd like to see a rec center and/or swimming pool. Other frequent responses included active uses on Barker, more biking/walking trails and an ice rink.

- **Enhanced physical environment:** This question received a lot of responses. Far and away the most frequently mentioned improvement mentioned here were ways to improve pedestrian mobility, including more and improved sidewalks and trails. The second most frequently mentioned issue was to improve the run-down look of downtown. Also frequently mentioned was the creation of a central gathering place in town.

- **Live entertainment:** Several responses regarding live entertainment included several requests for more family-friendly entertainment.

- **Special events:** Bike and sporting events were most frequently mentioned as special events respondents would like to see. An outdoor movie theater was also mentioned.

- **More welcoming atmosphere:** The predominate answers to this question fall into two categories: physical environment and customer service/attitude. Responses to this question were concerned with improving the physical environment in downtown including a generally cleaner appearance and physical improvements such as planters, lights and benches and better sidewalks and crossings.

While some respondents indicated they feel Nederland is friendly and welcoming, a greater number of respondents indicated lack of cleanliness in various businesses,

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poor customer service in town generally as well as in some of the restaurants and the grocery store.

- **Better information on what exists:** Most of the ideas focused on better maps and greater details on upcoming events.

- **Other:** Nearly 90 other open-ended responses provided a variety of improvement ideas, most of which have been addresses in previous sections of this summary.

If you could add or change ONE thing to improve Nederland's commercial districts, what would it be? Most of the responses to

this question were ideas that had been mentioned previously. Prevailing themes included sprucing up the downtown area, making it more pedestrian friendly, improving the look of 1st street and improving access to the creek and the reservoir.

SURVEY CROSS-TABULATIONS: Survey results were cross-tabulated by:

- Length of residency in the Nederland area
- Gender
- Age
- Area of residence

Length of residency in the Nederland area: The following differences were noted among respondents based on the amount of time they have lived in Nederland:

- Persons who have lived in Nederland for more than 10 years (49% of all survey respondents fall into this category) go to restaurants and bars, the post office, special events, and entertainment less frequently than respondents who have lived in Nederland for less than 10 years.
- Respondents who have lived in Nederland less than 1 year visit the library, post office, do shopping other than grocery shopping, visit bars and restaurants, go to entertainment (live music and movies) and participate in outdoor recreation more frequently than those who have live in Nederland for more than 1 year.
- Residents who have lived in Nederland for 6-10 years use Nederland schools and/or daycare almost twice as often as any other group.
- The longer respondents have lived in Nederland, the lower the opinion of customer service in town becomes: 8% of residents who have lived in Nederland less than 1 year consider bad customer service a reason to stay away from Nederland, compared to 11% of those who have lived in Nederland 1 to 5 years, 18% of those who have lived in Nederland 6 to 10 years and 21% who have lived in Nederland more than 10 years. A similar pattern occurred when asked if Nederland is avoided due to a generally unappealing environment.

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- Residents who have lived in Nederland less than 1 year are more likely to shop online (48%),
With 40% of 1-5 year residents, 34% of 6-10 year residents and 28% of 10+ year residents indicating they shop online.
- 70% of residents who have lived in the area for more than 10 years live outside the town limits, while 6% live downtown, 26% of those who have lived in the area less than one year live downtown, while 6% live outside town limits.

Cross tabulation by Respondent Gender: The following attributes were noted by respondent gender:

- Of those who indicated they visit downtown Nederland almost daily, 49% were female, while 54% were male (68% of all survey respondents

were female).

- 92% of female respondents indicate they go grocery shopping regularly, while 88% of males indicated the same.
- 53% of women indicated they participate in outdoor activities, while 49% of males indicated the same.
- **Cross tabulation by Respondent Age:** The following attributes were noted by respondent age:
 - Respondents between the ages 25-34 were more likely to visit restaurants and bars, attend special events, go to the post office and participate in outdoor recreation than any of the other surveyed age groups.
 - Respondents between the ages 35-49 were more likely to do “other shopping”, attend entertainment (live music, movies, etc.), visit the library, go to Nederland schools and/or childcare, take care of personal business (hairstylist, gym, bank) and have town hall business than any other surveyed groups. 50-69 year-olds generally mirror the habits of 35-49 year-olds, with the exception of daycare/schools (much less), and bars/restaurants (slightly more)

Cross tabulation by Area of Residence: The following themes were noted by respondent’s area of residence. A map of Nederland subdivisions is attached in Appendix E.

- 86% of residents from Sunnyside/Hilltop visit Nederland for shopping, eating or doing business on a daily basis, followed by 63% of downtown residents, 58% of residents from Big Springs and 43% who live outside Nederland town limits.
- 95% of Sunnyside/Hilltop residents regularly visit Nederland for grocery shopping, followed by 92% of downtown residents, 90% in Big Springs, 89% “other” and 89% outside of Nederland town limits.

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- “Poor customer service” was considered a reason not to visit Nederland businesses by 29% of downtown residents, 17% of Sunnyside/Hilltop residents, 16% of those who live outside of the town limits, and 14% of Big Springs residents.
- Residents of Big Springs had the highest frequency of commuting to work and shopping elsewhere – 50%, followed by 40% of residents who live outside the town limits, 35% “other” and downtown residents and 22% of the residents of Sunnyside/Hilltop.

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VI. CONCLUSIONS

The following conclusions are based upon stakeholder feedback from the community outreach process, direct mail survey and the Nederland economic profile.

Nederland Has Tremendous Potential to Capture Markets

Nederland is central to a variety of markets. It has a captive residential market of more than 5,000 residents within its school catchment area, six million annual visitors to Arapaho-Roosevelt National Forest, more than 200,000 visits to Eldora Ski Area and almost two million vehicles traveling the Peak-to-Peak Highway annually. Because it is ideally situated near several recreational venues as well as the Boulder and Denver metro areas, Nederland is strategically positioned to capitalize on its untapped markets.

Nederland Area Residents Frequent Local Businesses

Based upon responses to the direct-mail survey distributed to Nederland area residents in July 2004, the vast majority of area residents patronize local establishments, particularly the B&F Market, restaurants and bars and the Nederland post office.

Erosion in Sales Tax Revenue

Despite Nederland's advantages of being accessible to area residents and tourists and a pattern of strong residential patronage, sales tax revenues in Nederland have been steadily declining over the last several years.

Perception of Poor Quality and Customer Service

Even though residents frequent local stores and restaurants, responses to the direct mail survey reveal that there is significant dissatisfaction with the Nederland shopping experience. There is an overriding sense that Nederland shops and restaurants are unclean and provide poor customer service.

Business Practices Perpetuate Negative Stigma

Nederland's counter-culture stigma is reinforced by business practices that create concerns with cleanliness, quality and customer service. These practices are associated with Nederland's recent past, but its current markets are composed of a more affluent, conventional and sophisticated clientele.

Nederland businesses are not keeping up with changes in the local marketplace – they appear to cater to a one-dimensional market in a multi-dimensional marketplace.

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VII. NICHE STRATEGY

The challenge is to reposition Nederland to become more relevant to its immediate market opportunities, yet retain some of the character and flavor that makes the place unique.

To be more relevant to its markets, Nederland should convey that it is:

- a **recreational gateway**, particularly to the Indian Peaks Wilderness
- a small and charming **mountain town** that values its quality of life
- **conveniently** located as a **getaway hub** to a variety of markets

These attributes alone are not completely unique and could be construed for several Front Range mountain communities. Nederland's recent past is both its greatest asset and detriment. Its regional

characterization as a **counter culture enclave** is, like it or not, a distinction that positions Nederland differently and places it on the consciousness of Front Range markets. We suggest the best qualities of this stereotype need to be incorporated into Nederland's positioning strategy (i.e. **welcoming, relaxed, intimate, free-spirited**) while marketing and community investment efforts are directed to combating the negative stigma (i.e. dirty, lazy, judgmental, irresponsible).

***Nederland is the recreational gateway to the Indian Peaks,
a free-spirited mountain town that offers
a welcoming, relaxed and intimate atmosphere.***

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VIII. ACTION PLAN RECOMMENDATIONS

I. IMPROVE THE SHOPPING/DINING EXPERIENCE FOR THE LOCALS

Nederland businesses should consider upgrading merchandising and other business practices, particularly ways to improve customer service techniques. We suggest a particular focus to improve the grocery store and town restaurants, since these venues are most frequented by locals. Key elements of this strategy include:

- **Refresh Store Appearances:** Work harder to create a cleaner and fresher atmosphere within the grocery, restaurants and other businesses. Cosmetic improvements could include new fresh paint, new menus and signage.
- **Improve Customer Service:** The Chamber could take a leadership role in sponsoring customer service training for local businesses to improve friendliness and responsiveness.
- **Promotions for Locals:** Coordinated and collaborative promotions for local residents (i.e. Nederland Area Appreciation Days) should be scheduled throughout the year by businesses participating within the Chamber.
- **Explore Cross-Marketing Opportunities:** The grocery store, restaurants and post office should be considered the local "anchors" for the Nederland shopping experience. These venues provide opportunities to disseminate information on a variety of Nederland businesses and events, including the distribution of business directories, promotional material on events, etc.
- **Recruit Additional Stores, Restaurants, and/or Add Products:** There are opportunities to recruit stores and/or add product lines to cater to local markets. From the direct mail survey, store and product options include: Restaurants, particularly Asian and Mexican, a larger selection of produce and dry goods in the grocery store, apparel, including children's clothing, lumber and shoes. In addition, the retail leakage analysis revealed product gaps in the apparel and entertainment (i.e. non-performance) segments.

II. STRENGTHEN MARKETING CHANNELS FOR VISITOR MARKETS

In order to become more visible and attractive to its different markets,

Nederland needs to pursue traditional marketing channels that provide information about services, amenities, and recreational opportunities in the area. We see four viable segments in the regional visitor market, including:

- **Eldora Ski Area visitors:** During the 2002-2003 ski season, Eldora hosted almost 290,000 skier visits, a 14.6% gain over the previous season. Only three miles

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from Nederland and seasonally served by RTD, Eldora is the closest ski area to the Denver/Boulder area, with more than 75% of its visitors coming from Boulder County.

- **Peak-to-Peak Highway:** This is Colorado's oldest scenic byway, passing through the towns of Nederland, Lyons, and Estes Park. An estimated 1.8 million vehicles travel the road annually.
- **National Forest/National Park visitors:** An incredible 6.2 million people visited the Arapaho-Roosevelt National Forests in 2000, and almost half of those visits were to the Rocky Mountain National Park.
- **Front Range residents** (i.e. Boulder, Longmont, Arvada): Nederland is within 45 minutes of the north Denver metro area, home to approximately 250,000 residents.

Suggested marketing improvements include:

- **Signage along highways:** There is little or no informational or directional signage along Highways 119 and 72 alerting passers-by that Nederland lies ahead. Initial conversations with a CDOT representative indicate CDOT is willing to explore installing directional signage to Nederland at strategic locations on both highways 119 and 72.
- **Gateways to town at major entry points:** Visitors coming into Nederland via either Highway 119 or 72 might not realize they have arrived in Nederland due to the lack of signage on their drive in and the absence of definitive features. Gateways can be designed to help establish an identity and sense of place at major town entry points.
- **Signage or graphics promoting Nederland as the Gateway to the Indian Peaks Wilderness:** A uniform signage and identity package that is catchy and easily identifiable to passers-by could help reinforce Nederland's niche as a gateway to the outdoors and recreational activities.
- **Improvements to the Nederland Visitor Center:** Improved signage and exterior finish of the visitor center could attract more people to the center. Visitor access to maps and directories when the center is not staffed should be explored.
- **Broader distribution of Map & Directory** The Nederland map and directory should be distributed at the town anchors, including the grocery store, post office, restaurants and Eldora. Mutually beneficial cross-marketing links with Eldora, which may also apply to other visitor destinations, include:

- **Links to town businesses on Eldora’s website:** Evidence suggests that businesses that have posted links on Eldora’s website have been successful. Eldora has indicated a willingness to work with businesses who want to be accessed on their website.

- **Link to Eldora on the Town website:** There is currently a link to Eldora on the Chamber website, but there isn’t one included in the town website.

- **Information on Nederland businesses distributed at Eldora:** In order to capture return visitors and educate skiers as to Nederland’s restaurant and retail offerings, distribution of maps and directories to Nederland area businesses should be pursued. Initial discussions with the ski area management suggest this is something they are willing to consider.

- **Marketing Eldora at the Visitor’s Center, popular businesses and other venues in town:** Nederland area businesses and restaurants should be distribution points for ski area trail maps and other information relating to the ski area.

III. CREATE A FUNDING MECHANISM TO FINANCE A FACELIFT FOR DOWNTOWN NEDERLAND

In order to create a long-term sustainable strategy for an economically healthy Nederland, we recommend a facelift for downtown. Downtown currently lacks a consistent sense of identity due to empty lots in prime commercial locations, sidewalks that are in disrepair or non-existent, difficult access to Boulder Creek, and absence of public space providing amenities such as street furniture and lighting. Without significant investment in the aesthetic quality and overall environment of town, attracting consumers – locals and tourists alike- will continue to be an uphill battle.

Throughout this planning process, the need for physical improvements has been a consistent theme expressed by community, business and civic leaders alike. While several improvements were mentioned in a variety of forums, stakeholders generally agreed that the top priorities for downtown include pedestrian mobility; Creek access, and the creation of a town square. Specific improvement concepts included:

- **Town square/public gathering place.** Most of the community members who participated in this planning process voiced a strong need for a central gathering place in town. The gathering place or “town square” could host town events, offer a recreational amenity such as a carousel or ice rink and provide a stronger sense of identity for the community.

- **Sidewalks & trails.** Another top priority among Nederland stakeholders is to provide safe and appealing ways to travel through town by foot and bike. Currently sidewalks are sketchy at best and trails are underdeveloped. Creating a connection

from the RTD lot through town to Barker reservoir would enhance the sense of connection in the downtown area.

- **Riverfront development.** Almost everyone agrees Boulder Creek is a desperately underutilized asset. It very difficult to access and the buildings that are adjacent to the Creek generally have their back toward it. The riverfront is an asset that needs to be easily accessible and widely utilized.

To test the preceding local priorities and to deepen the consultant team's understanding of downtown's design challenges, Boulder-based and nationally acclaimed urban designer Jerry Shapins accompanied the consultant team and Chamber of Commerce leadership on site design "audit" of downtown. The design audit affirmed local priorities and offered additional suggestions including:

- Better sidewalks and crosswalks throughout the downtown core.
- Trails and/or a riverwalk adjacent to Boulder Creek.
- An outdoor area that capitalizes on the nearby scenic beauty and provides a gathering area for the community and its visitors.
- Utilization of a town-owned parcel behind the Visitor's Center as a potential town center development, including residential and civic activity components.

Financing the Facelift – TIF: In order to finance physical improvements identified as priorities for Nederland, a tax increment financing (TIF) district is recommended. TIF is a unique mechanism which enables future tax revenues generated by a redevelopment project to help finance the upfront and capital project development costs. In effect, TIF results in the creation of new sources of tax revenue that wouldn't have been available if the project hadn't been undertaken. When a redevelopment project is being planned, an analysis of how much additional property and/or sales tax might be generated once the project is completed. The "tax increment" can then be used to finance the issuance of bonds or to reimburse developers for a portion of their project costs. In either case, new tax revenue must be used for improvements that have a public benefit and support the redevelopment effort.

Of all redevelopment projects statewide, a majority (63%) use a combination of sales tax and property tax (source: Colorado Municipal League). In 2003 the Colorado Municipal League conducted a survey of TIF districts in the state. Municipalities responded overwhelmingly (90%) that after the creation of a TIF district, the overall valuation of properties values both within the TIF district and surrounding the TIF district were increasing. Prior to the formation of the TIF district, only 40% of the surveyed municipalities said property values were increasing. (Source CML Survey, September 2003.)

In Colorado there are two ways to create a TIF district: by creating a

Downtown Development Authority (DDA) or an Urban Renewal Authority (URA). Examples of towns with URA's include Estes Park, Delta and Alamosa. Examples of towns that have DDA's include Crested Butte, Ft. Collins and Glenwood Springs.

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A downtown Nederland TIF district could be part of an effort (in tandem with other sources of funds such as local and federal grants and/or low-interest loans, addressed in further detail in part IV of this document) to finance town improvements.

Infrastructure improvements supported by a TIF district should leverage private investment through the use of TIF when feasible – a town square that includes some commercial and/or housing development, situated primarily on town-owned riverfront land, could be an ideal TIF project for two reasons:

- A town priority could be met in developing a central gathering place.
- Any development that occurs on publicly held, non-taxed land would generate a greater tax increment because the beginning tax base would be zero.

In addition to the above-mentioned capital improvements, we recommended that the library be moved to a more accessible and central location in downtown Nederland, perhaps as part of a town square development. Only 25% of direct-mail survey respondents indicated they use the library, a usage rate that is far less than similar surveys we have undertaken in other communities (i.e. 50% to 60%). We suggest that a more central and visible location could help increase usage of the library. The library district could potentially help fund its move and contribute to town center improvements.

A DDA or URA for Nederland?

A Downtown Development Authority (DDA) is a self-taxing district that encompasses a defined commercial district within a downtown area. It is a quasi-municipal corporation, which is intended to halt or prevent deterioration of property values or structures in central business districts. A DDA can generate a mill levy of up to five mills on commercial property within the district boundary and creates a mechanism that allows for TIF. A DDA does not have eminent domain powers (and therefore cannot condemn property) and must be formed with the consent of a majority of eligible voters within the proposed district. It is formally created pursuant to a City Council ordinance.

An Urban Renewal Authority (URA) is established by a municipality in order to eliminate blighted areas through redevelopment. A URA can purchase land and buildings within a defined area, can exercise eminent domain and generate TIF. A URA requires a finding of blight in order to be formed. URA's require public hearings and a City Council ordinance creating the authority. An independent board governs the URA.

The chart below illustrates the major differences between a DDA and a URA:

DDA	URA	
Can generate sales and/or tax increment to help finance future development	yes	yes
Allows revenue sharing with municipality via an IGA	yes	yes
Is subject to TABOR	Yes*	no
Can generate mill levy on commercial property	yes	no
Requires an election to establish	yes	no
Needs approval from other county entities reliant upon property taxes	yes	yes
Needs approval from other county entities reliant upon sales taxes	no	no
Can utilize eminent domain	no	yes**
Requires City Council ordinance	yes	yes
Requires public hearing	yes	yes
Area must be declared blighted to form district	no	yes
Need development plan to establish district	yes***	no
* can be exempted from TABOR in district vote		
**urban renewal district can be formed omitting eminent domain authority		
*** PUMA study may suffice as development plan		

We conclude that a DDA in Nederland is the best fit to accomplish the following goals:

- Establish a tax increment financing district that can use the incremental sales and/or property tax revenue from future increased value to finance immediate improvements
- Generate five mills on commercial property located within the district that can be applied toward the operational and management costs of the DDA as well as a part time director and/or grant writer.
- Create a sustainable champion and long-term focus for the downtown Nederland revitalization effort.

Per Colorado state law, A DDA has a board of five to eleven members, with at least one member from the town governing body and all other members shall reside, be a business lessee, or own real property in the DDA boundaries.

It is recommended that a Nederland DDA should encompass all commercial areas within the town core, on both the north and south sides of Boulder Creek. A map and list of core property ownership is attached as Appendix F.

IV. ADDITIONAL FUNDING MECHANISMS TO COMPLIMENT AND LEVERAGE A TIF DISTRICT

In order to better understand sources of financing for capital improvement projects in Nederland, we undertook research on five other small Colorado towns that have successfully secured financing for a variety of capital improvement projects ranging from riverfront redevelopment and restorations to museums and recreation centers. Sources of financing range from multi-million dollar federal grants to buy-a-brick campaigns.

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Of the towns researched, many were successful with the same or similar agencies in securing grants and/or low interest loans, notably the Department of Local Affairs (DOLA), Great Outdoor Colorado (GOCO) Colorado Department of Transportation (CDOT) and the US Department of Economic Development and the US Environmental Protection Agency. A chart outlining the towns researched, projects, funding sources and persons to contact is attached on page 48.

Based upon the above-mentioned research, as well as conversations with Department of Local Affairs field representatives Don Sandoval (representing the north central region, which includes Nederland) and Lee Merkel (representing the southeastern region), Jon Schler with the Colorado Center for Community Development at the University of Colorado, and a representative from the Denver-based Anschutz Family Foundation, grants for which Nederland meet the criteria and is potentially competitive because of its size and needs are listed below. There are three sections that follow:

- Grant sources for capital improvements,
- Grant sources for planning and feasibility studies,
- Foundations that provide funding and/or matching funding for capital improvement projects.

The following suggestions are listed in order of priority (within each of the above-mentioned categories) by funding potential for Nederland.

Capital Improvement Grants:

Grants specifically intended for capital improvement projects include:
CDOT Enhancement Grants (Colorado Department of Transportation): Enhancement funds can be used for the following activities:

- Pedestrian and bicycle facilities construction
- Scenic easement and historic site acquisition
- Scenic highway programs
- Historic preservation
- Preservation of abandoned railway corridors
- Other miscellaneous categories

Other types of CDOT grants and funding address the following issues (contact grants coordinator listed below for further information):

- Street widening, medians, turn slots and other traffic management needs.

- Capacity and drainage

- Maintenance including paving and other improvements

Enhancement Grant Guidelines for Consideration:

- No minimum or maximum dollar amount – award dependant on project
- Funding is typically outlined in 3-year cycles
- 20% match required

Contact: Dean Van deWege, Program Coordinator, 303-757-9341

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CDBG (Community Development Block Grant) Infrastructure Grant Program:

Designed to create and retain jobs, primarily for low-moderate income people and to encourage business development and business retention in non-entitlement cities with less than 50,000 people, counties and towns. Funds are used in the following ways:

- Street lighting & sidewalks
- Construction of roadways Construction and/or improvement of publicly owned water and wastewater facilities and lines
- Construction of alternative power sources
- Other

CDBG Grant Guidelines for Consideration:

- Grant awards usually range between \$100,000 - \$500,000
- Restricted to non-entitlement cities (less than 50,000

population)

- Must demonstrate the creation of 1 job for every \$20,000 in

CDBG money awarded

Contact: Alice Kotrlik, Governor's Office of Economic Development and International Trade, 303-892-3840

Energy Impact Grants – the Energy and Mineral Impact Assistance program assists communities affected by the growth and decline of energy and mineral industries in the state. Funds come from the state severance tax on energy and mineral production. The kinds of projects that are funded include:

- Water and sewer improvements
- Road improvements

- Fire protection buildings and equipment, and local government planning.

Energy Impact Grant Guidelines for Consideration:

- Deadlines are December 1, April 1 and August 1

Contact: DOLA Representative Don Sandoval, 970-679-4501

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Great Outdoors Colorado (GOCO) – GOCO awards both grants and mini-grants to local governments to establish, expand and enhance park and outdoor recreation and environmental education facilities, including:

- Playgrounds
- Sports fields
- Fixed assets that will improve an outdoor recreation or environmental education facility

GOCO Grant Guidelines for Consideration:

- Maximum award \$150,000 and \$15,000 for mini-grants
- 30% match required

Contact: Wally Piccone, Senior Program Manager (303)863-7522

U.S Economic Development Administration Distressed Community Economic Development Grants – provided to

communities with the purpose of attracting new industry, business expansion, diversify economies and to provide matching funds for economic development planning and economic adjustment including:

- Technical assistance
- Planning
- Public works projects
- Economic adjustment

USED A Grant Guidelines for Consideration:

- Ongoing grant cycles
- Grants are awarded within areas experiencing economic distress including high unemployment, low per capita income or other special needs.

Contact: John Zender (303) 844-4902

Colorado Division of Wildlife provides funding for capital improvements through a program called *“Fishing is Fun in Colorado”*.

Grants are awarded to communities in order to:

- Create access for outdoor enthusiasts to boat landings, streams & lakes
- Develop fishing sites including docks and boat launches

Fishing is Fun Grant Guidelines for Consideration:

- Funds are strictly for capital improvements
- Usually award grants between \$15,000 - \$400,000

Contact: Steve Puttmann, Northeast Regional Service Center (970) 472-4300 ext. 321 or refer to <http://wildlife.state.co.us/fishing/fun/>

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Planning and Feasibility Grants:

Grants specifically intended for planning and feasibility studies include:

Colorado Office of Economic Development and International Trade

The planning and feasibility study grant program is designed to provide funding to determine the feasibility of a project or to plan for a project that will be located in Colorado. Such projects will need to meet an economic development objective. For 2004, a total of \$150,000 will be made available during two competitive cycles.

Contact: Ken Gabriel or Alice Kotrlik (303) 892-3840

Community Revitalization Partnership Grant

The Department of Local Affairs (DOLA) and the Colorado Community Revitalization Association (CCRA) are sponsoring a one-year pilot program that will provide advisory services, technical assistance and educational opportunities relating to downtown revitalization to communities under 20,000 in population that have not been designated Colorado Main Street communities. DOLA funds will combine with up to a 50% local match to pay for the assessment and technical assistance services.

Contact: Barbara Silverman: 303-282-0625 or Don Sandoval, 970-679-4501

CDOT Enhancement Funds

CDOT enhancement funds can be used for either capital improvements (as noted above) or for the planning, design, and implementation of physical improvements.

Contact: Dean Van deWege, Program Coordinator, 303-757-9341

Small Cities – Community Development Block Grants

The CDBG grant program goal is to assist local governments implement projects that are responsive to local community development needs, strategies and priorities. Grants can range from \$45,000-\$350,000.

Contact: DOLA Representative Don Sandoval, 970-679-4501

U.S Economic Development Administration Distressed Community Economic Development Grants

These funds can be used as matching funds for economic development planning.

Contact: John Zender (303) 844-4902

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Colorado Heritage Planning Grant Program

The CHPG grants recognize and reward communities that cooperatively plan for growth, assist and assist local governments in anticipating and responsibly addressing the unique public impacts caused by growth. The governing bodies of at least two local governments must make the grant.

Contact Lillie Fuller 303-866-3296

Other possible grant sources (for both capital improvements and

planning) that could be a good match for Nederland that were mentioned by DOLA representatives and other resources include: DOLA's Limited Gaming Impact Grant Program, Colorado Water Conservancy Board and EPA state and travel assistance grants. All of these grants can be referenced in the DOLA publication entitled *Colorado Local Government Grant and Loan Directory*, which can be viewed at www.dola.state.co.us/fs/GrantLoan.pdf

Foundations

The consultants researched several foundations that may prove to be good sources of capital improvement money and/or matching funds for Nederland capital improvement and planning projects. The foundations researched were:

Boettcher Foundation Boettcher provides grants up to \$400,000. The average award amount is \$10,000 - \$50,000. Capital improvement grants fall into the following categories:

- Civic & cultural
- Community and social services
- Education

Contact Katie Kramer 303-534-1937 or www.boettcherfoundation.org

El Pomar Foundation has a broadly focused funding mission. Their grants range from \$1,000 - \$2M. The average amount ranges from \$2,500-\$25,000. El Pomar helps finance capital improvement projects that fall within the following categories:

- Community and economic development
- Civic and community improvements

Contact Matt Carpenter 710-633-7733 or www.ElPomar.org

Gates Family Foundation provides grants from \$1,000 to \$800,000. Gates' focus is strictly capital improvements within the following parameters:

- Improvements that provide a connection to nature,
- Education and cultural appreciation and
- Free enterprise and economic development

Contact Ellen Fischer 303-316-3001 or www.gatesfamilyfdn.org

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Knight Foundation (of Knight-Ridder News Service) provides grants in Boulder County. The Knight Foundation's average grant is \$233,000. Their focus falls primarily within the parameters of civic and community improvements including:

- Community initiatives
- Education
- Arts and culture
- Journalism

305-908-2600 or www.knightfdn.org

The **Union Pacific Foundation** provides grants to towns that are adjacent to a UP rail line. The UP Foundation provides grants that

average \$10,000 and concentrate on the areas of:

- Environmental conservation
- Civic and community improvement

402-271-5600 or www.op.com/foundT

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SELECT COLORADO CITIES' CAPITAL IMPROVEMENT PROJECTS & SOURCES OF FINANCING				
Prepared by Progressive Urban Management Associates, August 2004. (revised September, 2004)				
Contact/	Information/			Financing
Improvement				
Kristy Town Windsor,	town experienced intense growth - than doubled in last 10 order to meet heavier demand,	Downtown Streetscape (sidewalks, gutters, trees, street furniture)	\$	Special Improvement District; Town of Windsor; (\$1.1M) payable in lump sum or o
pop: 970-395-	needed new sewer, water power lines and repaved highway-	Lake Renovation (increased capacity and obtained surface water rights	\$	from CO Water Conservancy Board (\$1M); GOCO, Town of Windsor general shared l
used opportunity to pursue infrastructural added trails, museum)		allow fishing, swimming, boating) & Park (increased by 7		Private investor bought % of lake for future general
Bennet Beschenstein Planning Fruita, CO pop: 970-858-	Closed oil retail	Museum No new roads, HS sports park, of dinosaur	\$2.5 Foundation-museum park \$3M	Several GOCO grants (town applies every cycle, 2 x Dept of Economic Development (approx. \$500K) John Zender 303-844- DOLA -
Gateway to the Colo. Nat.		Rehab: trails, tree		enhancement grants - (2-
Opening of Dinosaur Museum in Opening of fat tire bike shop City, bike shop partnered to host fat tire festivals=lots of PR and media		Historic Town Hall		for mus visitor c TEA-21-state SHF grants(=\$100K)+DO
Rich Director of Communityoil		& Mining Community shale, cattle, logging all dramatic	festivals,summer Riverfront Development: park and	\$ foundat is fun (state parks)
Delta, pop: 970-874-		to begin to make an effort to pull community back up by its boot		soil Army Corps of EPA - er grant
Rec				01 sales tax increase
Sewage plant flood				State er
Ball field and Boettcher foundations Downtown Streetscape enhancement as processing fee; leveraged other resources		\$		
Ute Pow Wow				GOCO; lots of labor & in-kind
Public Art,				& City
Ashton Town Rico, pop: 970-967-	town between Telluride & mining	sewer		rural development (\$1.3 loan) Dept of Economic Development (\$1.2M grant) & job DOLA - energy impact grants (500K) Rico:old mining - state and travel assistance (\$1M)
grant (STAG); \$500K in local grants				
David City Planner Ouray, pop: 970-325-7070	western slope Underutilized riverfront public access - privately	Riverfront	\$	damage fund - \$ from mining damage earmarked for env. remediation project; propos
EI Pomar (\$15K) EPA section 319 water quality (\$125) through state department of health		for furniture, restrooms, trail signage)		landowners gave 1/2 to ci approx. 20 acres each). P redevelop
private landowners contributed approx. \$				uses. Balance being utilized as park and . open space

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IX. ACTION STEPS AND SEQUENCING

NEXT 18 MONTHS

ACTION	STEPS	RESPONSIBILITYCENTRS
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<p>I. Improve Shopping/Dining Experience for the Locals</p>	<p>A. Improve customer service and store appearances -- start with grocery & restaurants. B. Develop promotions for local markets -- start with restaurants, expand to other retail types. (i.e. Nederland Area Appreciation Days) C. Recruit additional stores – use market analysis to help new stores locate/expand in Nederland.</p>	<p>Chamber, grocery, restaurants, property owners Chamber, restaurants Chamber, Town of Nederland</p>
<p>II. Strengthen Marketing Channels for Visitor Markets</p>	<p>A. Work with CDOT to install directional signage to Nederland, Visitor’s Center, Mining Museum, etc. B. Develop new marketing identity and program to promote Nederland as Indian Peaks gateway. C. Broaden distribution of the Ned map and directory D. Explore improvements to the Visitor’s Center, w/ emphasis on improving access to information when not staffed. E. Explore links to Eldora Ski Area & website</p>	<p>Chamber, Town of Nederland, CDOT Chamber Chamber Chamber, Town of Nederland Chamber, Eldora</p>
<p>III. Create a Funding Mechanism to Finance a Downtown Facelift</p>	<p>A. Create a Downtown Development Authority (DDA). B. Develop priorities for facelift improvements – commission design work for top priorities – complete design work on first phase improvements.</p>	<p>Town of Nederland, Chamber, schools, county property owners Town of Nederland, DD Chamber</p>

Estimated Costs

\$ = Less than \$10,000; \$\$ = \$10,000 to \$25,000; \$\$\$ = \$25,000 to \$50,000; \$\$\$\$ = More than \$50,000

18 MONTHS to FIVE YEARS

ACTION	STEPS	RESPONSIBILITYCENTERS
I. Improve Shopping/Dining Experience for the Locals	<p>A. Maintain/monitor improvements in customer service and store appearances – all businesses.</p> <p>B. Grow promotions for local markets – all businesses.</p> <p>C. Recruit additional stores – use market analysis to help new stores locate/expand in Nederland.</p>	Chamber Chamber, DDA Chamber, DDA
II. Strengthen Marketing Channels for Visitor Markets	<p>A. Broaden distribution of map & directory and other marketing materials to all visitor markets.</p> <p>B. Design and install decorative gateways at key entries to downtown.</p> <p>C. Design and install physical improvements to the Visitor’s Center.</p> <p>D. Continue joint marketing with Eldora, expand to other attractions.</p>	Chamber DDA, Chamber, Town of Nederland Chamber, DDA, Town of Nederland Chamber, DDA
III. Create a Funding Mechanism to Finance a Downtown Facelift	<p>A. Raise matching funds and grants to finance priority improvements.</p> <p>B. Consider contributing town-owned land to incent new downtown development.</p> <p>C. Begin the Downtown facelift – town square, sidewalks, riverfront development.</p>	DDA, Chamber Town of Nederland, DDA DDA

Estimated Costs

\$ = Less than \$10,000; \$\$ = \$10,000 to \$25,000; \$\$\$ = \$25,000 to \$50,000; \$\$\$\$ = More than \$50,000