



Town of Brookline

Massachusetts

**Department of Planning and
Community Development**

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Kara Brewton
Director

To: Select Board and Mel Kleckner
From: Meredith L. Mooney, Acting Economic Development & Long-Term Planning Director
CC: Kara Brewton, Brookline Chamber of Commerce, Brookline Village Business Association, Coolidge Corner Merchants' Association, Economic Development Advisory Board, Small Business Development Committee
Date: January 11, 2021
Re: Update on 2021 Storefront Survey & Coolidge Corner and JFK Crossing Rapid Recovery Plan

Overview:

Brookline's 2021 storefront vacancy rate reached 12.5%, up from 11.9% in 2020. For the second year in a row amidst the pandemic, Brookline's town-wide storefront vacancy rate has climbed to historic highs. Immediate interventions are needed to provide additional support to Brookline's small business community and commercial areas - especially in Coolidge Corner - to stem rising vacancy rates, as well as, safeguard the health and vibrancy of Brookline's main streets.

Storefront Survey Background & Methodology:

The storefront survey is conducted annually, typically in the fall. This year's survey was conducted in September-October 2021. Economic Development Division staff take inventory of every storefront in Brookline's eight commercial areas. Local vacancy rates and trends are tracked to assess the health of our commercial areas and determine whether any special actions or interventions are needed to preserve the health and vibrancy of Brookline's commercial areas and small business community.

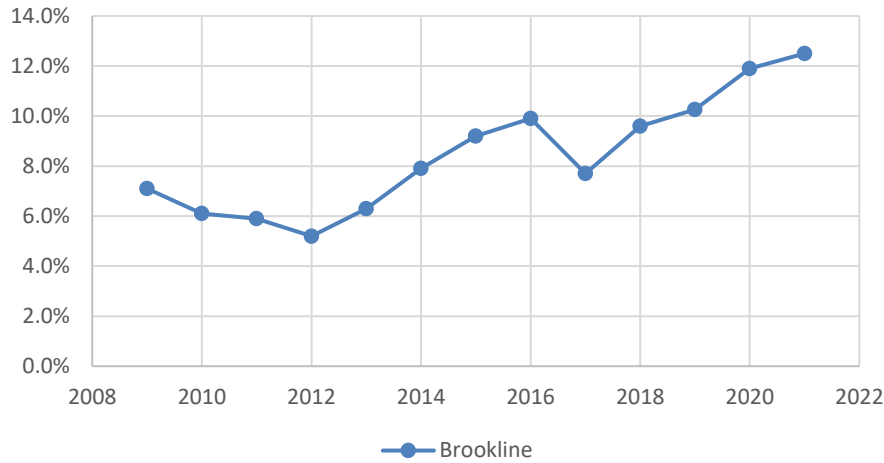
Our storefront survey methodology is conservative, meaning that storefronts that appear vacant are recorded as such, even if a storefront is leased and engaged in the permitting process when the survey is conducted. In the case of temporarily closed businesses, only businesses with For Lease signs clearly posted are counted as vacant. Storefronts included in new development projects are tracked as "under construction" and are factored into the vacancy rate only after construction is completed. With this methodology, the vacancy rate more accurately reflects the community's perception of commercial area vacancies.

Analysis:

At 12.5%, the town-wide storefront vacancy rate reached an unprecedented high in 2021. The economic impact of the pandemic has exacerbated the gradual increase of Brookline's storefront vacancy rate over the past decade.

Interventions are needed to reverse this trend. Recommended interventions are included in the following section. Areas of concern, as well as some encouraging recent trends, are identified below.

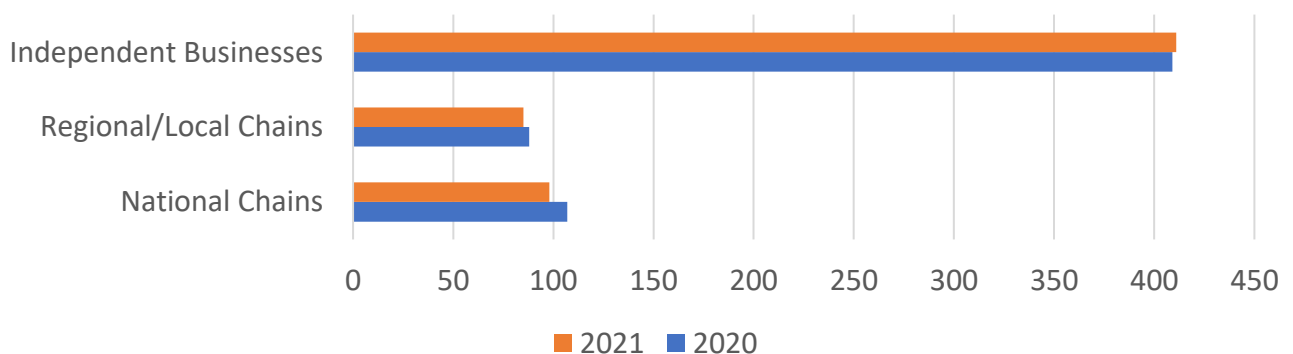
Brookline Vacancy Rate (2009-2021)



Analysis of the vacancy rates by business type (i.e. restaurant, retail, or service) and by commercial area reveal some encouraging and unexpected trends.

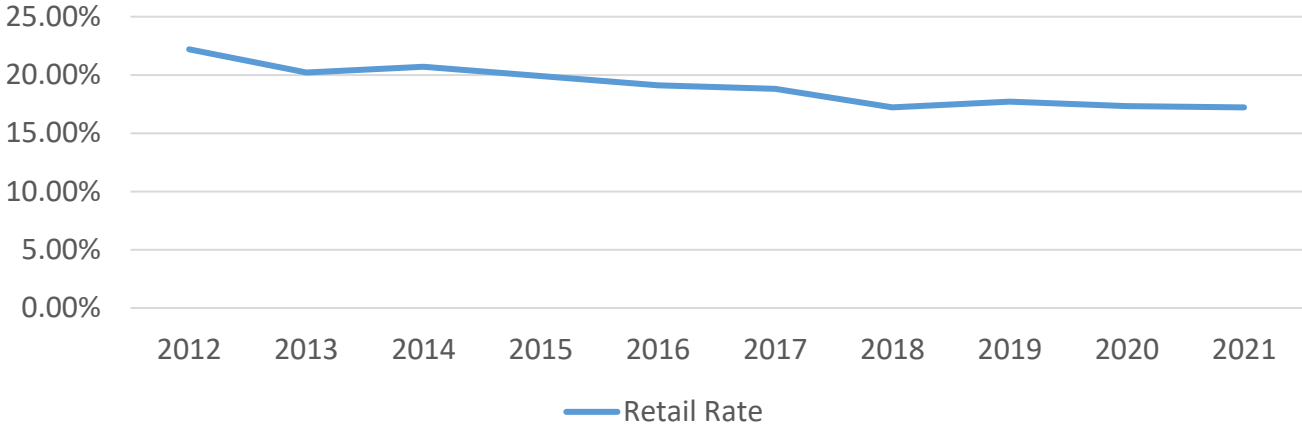
- Restaurants held steady:** Economic Development Division staff had anticipated many more business closures, especially restaurant closures, in the first and second quarters of 2021. However, the number of restaurants town-wide held steady at 151, which accounts for 25% of Brookline’s storefronts. The steady infusion of federal relief grant funding for businesses, including the Restaurant Revitalization Fund, was a critical lifeline to businesses over the past year and a half. Without continued grant funding assistance and given the turbulent transition to the “new normal” caused by new variants, the year ahead may pose a new set of obstacles and challenges to Brookline’s small business community.
- Independent businesses held steady, while chain businesses decreased:** The number of independently owned storefront businesses also held steady, increasing slightly from 409 to 411 (accounting for 68% of storefronts), while the number of national, as well as regional or local chains decreased. National chains decreased 8 percentage points, and regional or local chains decreased by 3 percentage points.

Brookline Storefronts by Commercial Use (2020 v. 2021)



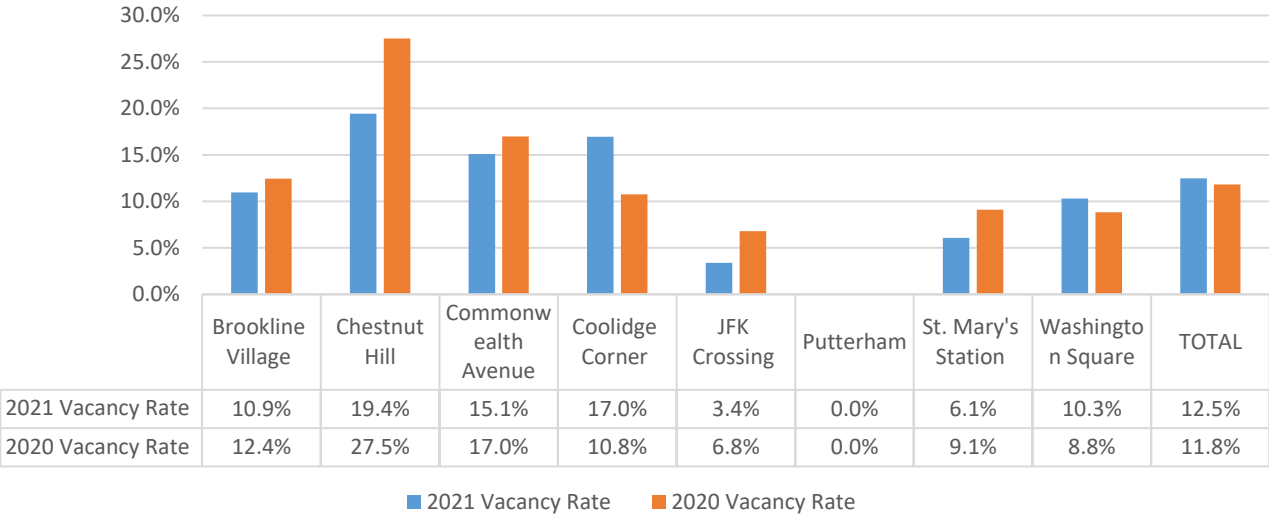
- **Retail rate has stabilized:** Since 2012, the number of retail stores has been in steady decline. However, the retail rate appears to have stabilized at 17% of Brookline storefronts.

Brookline’s Retail Rate



- **Vacancy rates fell in most commercial areas:** Even though the town-wide vacancy rate increased, vacancy rates in most of Brookline commercial areas decreased, except for Washington Square and Coolidge Corner.

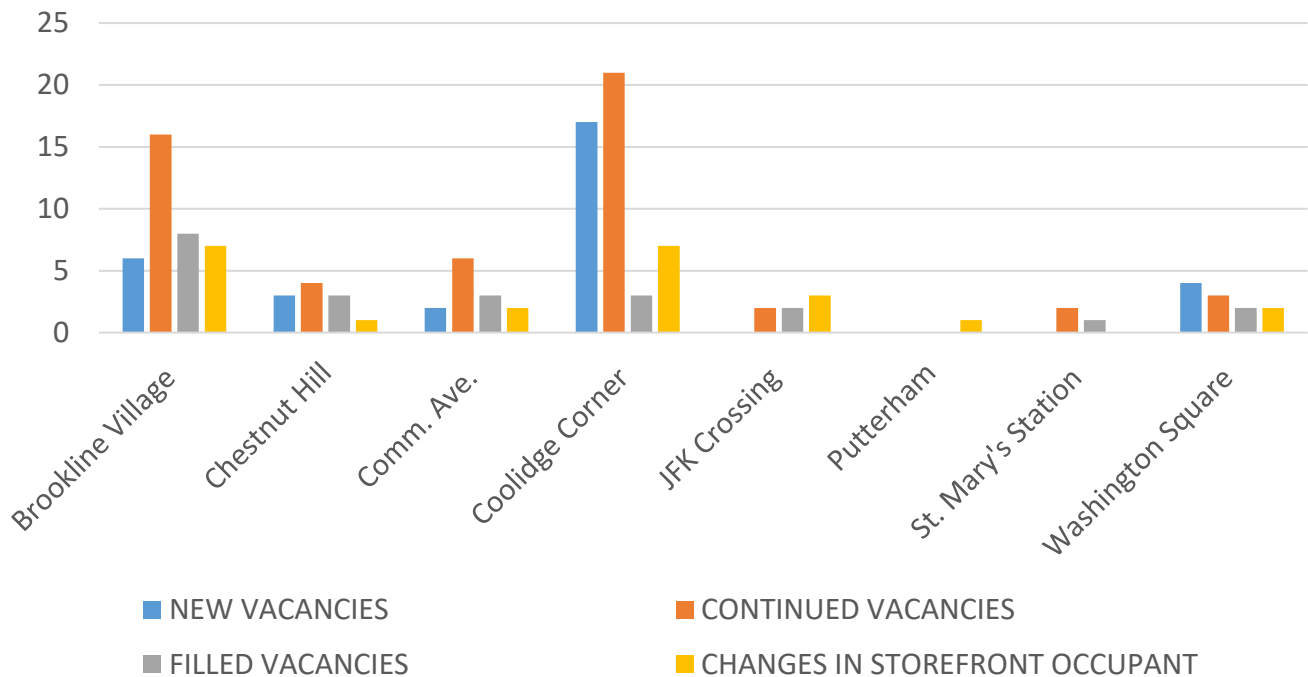
Vacancy Rate by Commercial Area (2020-2021)



- **Coolidge Corner vacancy rate is cause for concern:** A spike in the Coolidge Corner vacancy rate, which increased from 10.8% in 2020 to 17% in 2021, is driving the town-wide vacancy rate increase. This sharp increase in vacancies in Brookline’s largest commercial area is concerning. An analysis of the storefront churn by commercial area in 2021 (see 2021 Storefront Changes by Commercial Area below) shows a high number of both continued vacancies (i.e. storefronts that remained vacant from the previous survey) as well as new vacancies, with very few vacancies filled, or backfilling new vacancies, in Coolidge Corner.

Summary data for town-wide and commercial area vacancy trends are included in pages 9-14 of this memo.

2021 Storefront Changes by Commercial Area



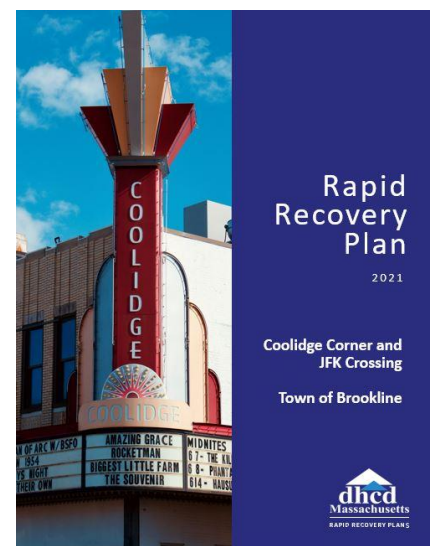
Intervention Needed:

As Brookline’s largest commercial area, the recent spike in Coolidge Corner’s vacancy rate and underlying trends is concerning and warrants intervention. Fortunately, in early 2021, the Town of Brookline received a \$95,000 technical assistance grant to participate in the state’s Local Rapid Recovery Plan and develop an actionable, project-based recovery plan to support Coolidge Corner and JFK Crossing’s COVID recovery.

Coolidge Corner & JFK Crossing Rapid Recovery Plan (RRP):

March-October 2021, the Town of Brookline participated in the state's [Local Rapid Recovery Plan \(LRRP\)](#), a technical assistance program to support post-COVID small business and commercial area recovery, included in the economic development package announced by the Baker-Polito Administration in fall 2020. Brookline's LRRP study area is focused on Coolidge Corner and JFK Crossing, but many of the RRP projects and initiatives are applicable to Brookline’s other commercial areas, as well.

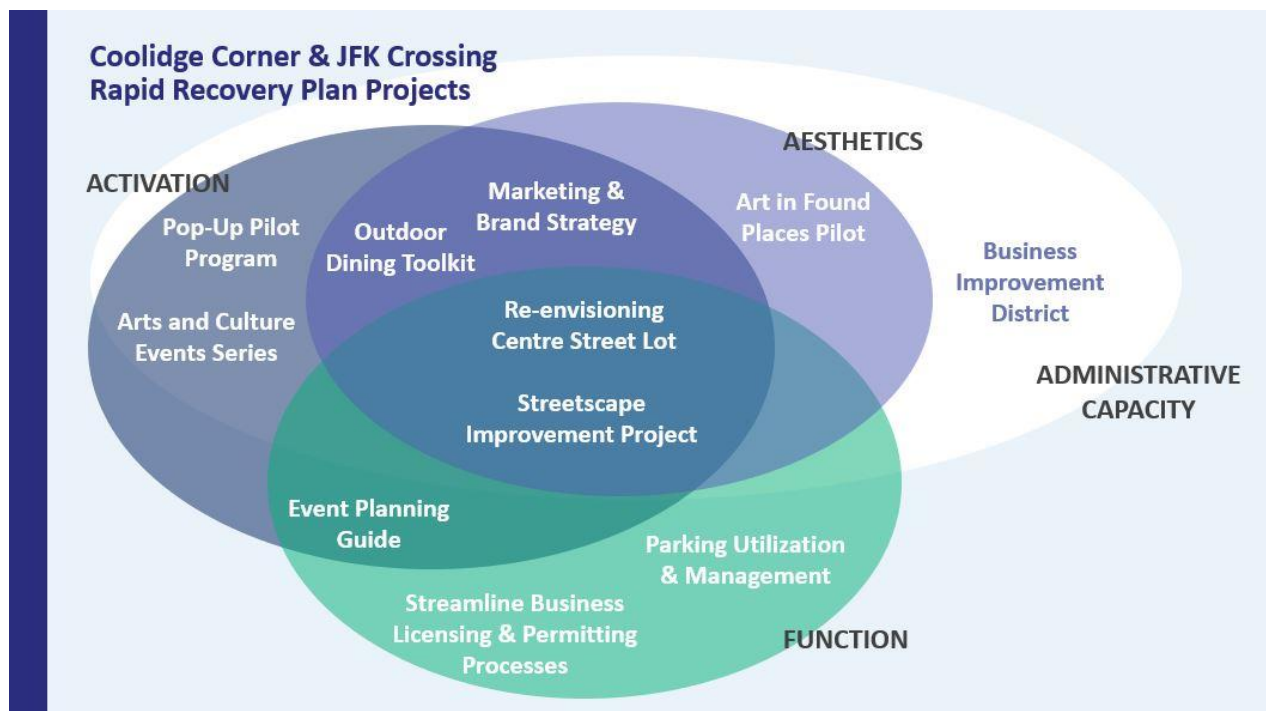
The [Coolidge Corner & JFK Crossing Rapid Recovery Plan \(RRP\)](#) is tailored to the unique economic challenges and COVID-19 related impacts to Coolidge Corner and JFK Crossing. A quick reference overview of the projects included the Coolidge Corner & JFK Crossing RRP is copied below and available in PDF form [here](#). The complete plan is available [here](#). Both documents can be found on the plan website: <https://www.brooklinema.gov/1971/Local-Rapid-Recovery-Plan>.



Coolidge Corner & JFK Crossing Rapid Recovery Plan: Quick Reference Projects Overview

PROJECT NAME	ENHANCES COMMERCIAL AREA...	ESTIMATED BUDGET	ESTIMATED TIMEFRAME
Re-envision Centre Street Parking Lot/Multi-purpose parking deck on the Centre St Lot	Aesthetic, Activation, Function	Large, multi-million-dollar project ~\$30,000/parking space	3 - 5 years
Development of a commercial area parking utilization and management plan	Function	~ \$60,000 – 80,000	4 – 8 months
Commercial Area Streetscape Improvement Project	Aesthetic, Activation, Function	Will vary widely depending on project scope. Less than \$1 million for minor improvements. Multi-million-dollar project for larger scale improvements.	2 – 3 years
Pop-Up Pilot Program (multi-faceted project, which includes creating a resource to support optimization of retail mix)	Activation	< \$100,000	~ 9 months
“Art in Found Places” Program (Public art installations, murals, etc.)	Aesthetic	\$50,000 - \$75,000	< 9 months
Branding and Marketing Strategy	Aesthetic, Activation	~ \$150,000 – \$200,000	1 – 3 years
Creation of an Arts & Culture Events Series (in partnership with the Coolidge Corner Theatre)	Activation	~ \$50,000 – \$100,000 (plus Town staff time and in-kind contributions)	< 9 months
Creation of a Business Improvement District (BID)	Administrative Capacity	< \$50,000	< 5 years
Creation of an Outdoor Dining Toolkit	Aesthetic	< \$5,000	3 – 6 months
Creation of an Events Planning Guide for Brookline	Activation	~ \$5,000 (plus Town staff time)	3 – 6 months
Streamlining business licensing and permitting regulations	Function	< \$50,000 (primarily Town staff time)	< 5 years

The Coolidge Corner & JFK Crossing Rapid Recovery Plan process included data collection, as well as community input gathered through survey responses from businesses within the study area, focus group discussions, as well as a community forum. Projects were developed in consultation with various Subject Matter Experts identified through the state’s Massachusetts Downtown Initiative (MDI), as well as extensive best practice research.



Coolidge Corner & JFK Crossing Rapid Recovery Plan: Executive Summary

Coolidge Corner & JFK Crossing's recovery will depend on building organizational capacity, fostering a stronger commercial area identity, and mastering parking utilization and management practices that unlock the commercial core's full placemaking potential.

About the Coolidge Corner & JFK Crossing Rapid Recovery Plan

As a participant in the state's Local Rapid Recovery Plan Program, from March through October 2021, the Town of Brookline developed a plan to help businesses in the Coolidge Corner and JFK Crossing commercial areas recover and thrive post-COVID. This plan was developed by the Town's Economic Development and Long-Term Planning Division and Brookline's Rapid Recovery Plan Facilitator, Ann Burke, under the guidance and direction of the Town's Economic Development Advisory Board (EDAB) and Small Business Development Committee (SBDC). The priorities and projects included in this Rapid Recovery Plan were informed by the local business community (through survey feedback and focus group input) and other key stakeholder groups (e.g. arts and cultural organizations, local residents, and property owners).

Coolidge Corner, as Brookline's largest commercial area, and JFK Crossing, a smaller commercial area adjacent to Coolidge Corner, were selected as the focus areas for this Rapid Recovery Plan, however, many of the priorities and projects outlined in this plan are pertinent to Brookline's other commercial areas, as well.

Coolidge Corner & JFK Crossing Rapid Recovery Plan Project Overview

Coolidge Corner & JFK Crossing's recovery will depend on building organizational capacity, fostering a stronger commercial area identity, and mastering parking utilization and management practices that unlock the commercial core's full placemaking potential. The eleven project rubrics outlined in this plan seek to address these goals by elevating Coolidge Corner and JFK Crossing's aesthetic quality and level of activation, and by creating administrative capacity and streamlining local policies.

Projects to enhance the area's aesthetic quality include a re-envisioning of the Centre Street Parking Lot, a comprehensive streetscape improvement project, the development and implementation of a commercial area brand identity and related marketing strategy, additional resources to support the outdoor dining program, and an "Art in Found Places" Pilot Program.

Activation-related projects include a pop-up pilot program, an arts and cultural events series, and the development of an Event Planning Guide.

Projects promoting additional administrative capacity and local policy enhancements include the creation of a Business Improvement District (BID) (i.e. a "backbone" district management entity), a parking utilization and management plan, and streamlining local business licensing and permitting processes.

Aesthetic Enhancements

The popularity of Brookline's COVID-era expanded outdoor dining program, especially outdoor dining in parking space parklets, has been revolutionary. Expanded outdoor dining's added commercial area vibrancy and activity has compelled Brookline and many other communities to build upon the value and potential presented by this new program, as well as confront the related parking implications. On-street expanded outdoor dining's displacement of many metered parking spaces has forced the issue of how to balance expanded outdoor dining as a promising new commercial area amenity with preserving critical parking resources, as Coolidge Corner and JFK Crossing remain very dependent on customers who travel to the area by car. Three overlapping projects seek to address this new challenge: the development and implementation of a comprehensive streetscape improvement project, a parking utilization and management plan, and the re-envisioning and redevelopment of

the Centre Street Parking Lot to accommodate a variety of uses, including the consolidation of the area’s public parking in a multi-use parking deck structure.

The “Art in Found Places” pilot program, which will bring more murals and public art installations into the LRRP study area, was inspired by the incredibly well-received bright splashes of color and points of interest created by the outdoor dining program’s decoratively painted protective barriers. And an Outdoor Dining Toolkit will provide restaurants with additional guidance and resources to encourage more consistency in the quality and design of outdoor dining areas.

Commercial Area Activation

Regular events and programming were identified as a critical need to bring more people into Coolidge Corner and JFK Crossing. A Coolidge Corner events series, a months-long arts and culture event series, created around the area's anchor institution, the Coolidge Corner Theatre, will bring people downtown to support businesses, cultural organizations, and tourist destinations. The event series timeline will be developed in reference to the opening of the theatre's expansion.

In support of this event series, and as a resource to future event planners in Brookline, an Event Planning Guide will be created to bring more clarity, transparency, and guidance to the event planning and approval process in Brookline.

A Pop-Up Pilot Program will activate vacant storefronts during a time of unprecedentedly high storefront vacancy rates in the study area, as well as build a pipeline for entrepreneurs and property owners alike that will optimize the retail mix and bring more diversity to the next generation of Coolidge Corner and JFK Crossing storefront businesses.

Administrative Capacity and Local Policy Enhancements

There is no existing district management organization in Coolidge Corner or JFK Crossing to plan and execute the priority programs and services needed for COVID recovery and beyond. The creation of a BID as a backbone organization to implement the priority projects identified in the Rapid Recovery Plan is considered fundamental.

The successful implementation of a parking management strategy, as well as streamlining the licensing and permitting processes for Brookline businesses will enable Coolidge Corner and JFK Crossing to remain competitive in attracting desirable new businesses to the area.

Next Steps:

The Town of Brookline and the Economic Development & Long-Term Planning Division will continue to support the local business community through the remainder of COVID and in navigating the transition to a “new normal”. The Division will also seek every opportunity to implement COVID-recovery initiatives that serve both the immediate needs of Brookline’s small business community, as well as long-term strategic transformational opportunities for the town’s commercial areas.

Priorities for the Economic Development & Long-Term Planning Division over the next few years are:

- Executing the Coolidge Corner & JFK Crossing Rapid Recovery Plan (RRP). Identifying and applying for available grant funding (at the local, state, and federal level, as well as private foundation grant resources) for RRP projects is a top priority.
- Continue to work with Coolidge Corner merchants and property owners to establish a Business Improvement District (BID), a district management entity that the pandemic has underscored as a critical

strategic tool to help expedite commercial area recovery and ensure greater resiliency for Brookline's largest commercial area. The Town of Brookline received a \$25,000 technical assistance grant to work with a BID consultant who can assist with assessing BID feasibility and quarterback BID formation efforts in Coolidge Corner.

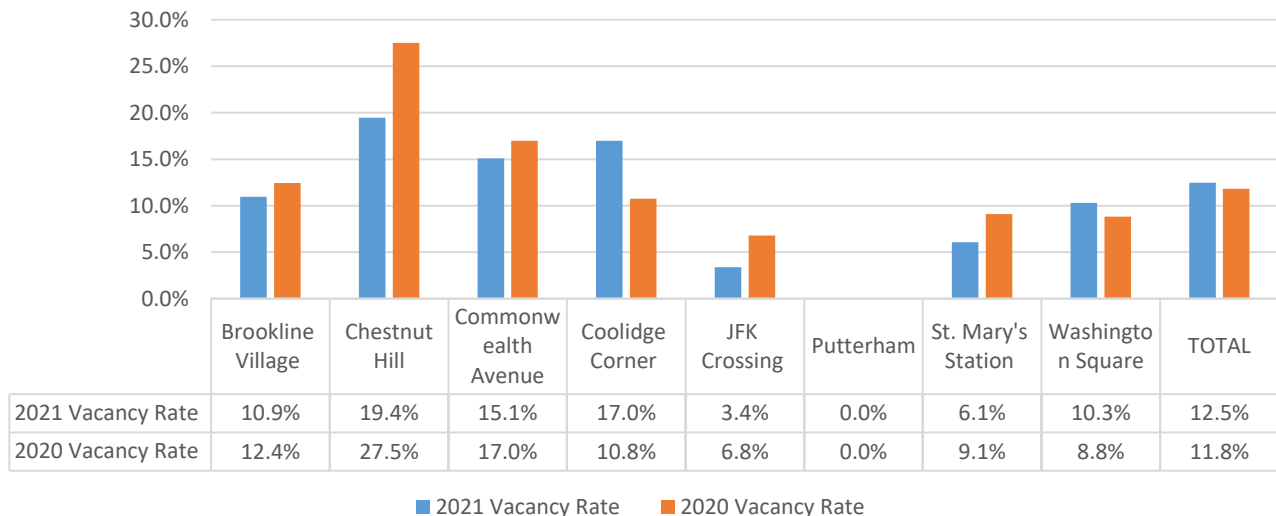
- Continuing to monitor storefront vacancy rates in Brookline's commercial areas.

Summary Data:

All Commercial Areas		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Vacancy Analysis	Total Storefronts	690	-	693	0%
	Total Active Storefronts	604	87.54%	616	-2%
	Total Vacant Storefronts	86	12.46%	83	4%
	Total Vacancy Rate	12.46%	-	11.87%	0.59%
Use Analysis	Restaurant Use	151	25.00%	151	0%
	Service Use	339	56.13%	347	-2%
	Retail Use	104	17.22%	106	-2%
	Institutional Use	8	1.32%	8	n/a
Chain v. Independent Business Analysis	National Chains	98	16.23%	107	-8%
	Regional/Local Chains	85	14.07%	88	-3%
	Independent Businesses	411	68.05%	409	0%

Commercial Area	Total Storefronts	Total Active	Total Vacant	2021 Vacancy Rate	2020 Vacancy Rate	% Change
Brookline Village	201	179	22	10.95%	12.44%	-1.49%
Chestnut Hill	36	29	7	19.44%	27.50%	-8.06%
Commonwealth Avenue	53	45	8	15.09%	16.98%	-1.89%
Coolidge Corner	224	186	38	16.96%	10.76%	6.20%
JFK Crossing	59	57	2	3.39%	6.78%	-3.39%
Putterham	16	16	0	0.00%	0.00%	0.00%
St. Mary's Station	33	31	2	6.06%	9.09%	-3.03%
Washington Square	68	61	7	10.29%	8.82%	1.47%
TOTAL	690	604	86	12.46%	11.83%	0.63%

Comparison of Vacancy Rate by Commercial Area (2020-2021)



By Commercial Area:

Brookline Village		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	201		201	0%
	Total Active Storefronts	179	89.05%	176	2%
	Total Vacant Storefronts	22	10.95%	25	-12%
	Total Vacancy Rate	10.95%		12.44%	-1.49%

Use Analysis	Restaurant Use	37	20.67%	37	0%
	Service Use	116	64.80%	114	2%
	Retail Use	25	13.97%	24	4%

Chain v. Independent Business Analysis	National Chains	21	11.73%	20	5%
	Regional/Local Chains	15	8.38%	16	-6%
	Independent Businesses	142	79.33%	139	2%

Change Analysis	New Vacancies	6
	Continued Vacancies	16
	Filled Vacancies	8
	Changes in Storefront Occupant	7
	Changes in Use	1

Chestnut Hill		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	36		40	-10%
	Total Active Storefronts	29	80.56%	29	0%
	Total Vacant Storefronts	7	19.44%	11	-36%
	Total Vacancy Rate	19.44%		27.50%	-8.06%

Use Analysis	Restaurant Use	1	3.45%	1	0%
	Service Use	19	65.52%	19	0%
	Retail Use	8	27.59%	8	0%

Chain v. Independent Business Analysis	National Chains	7	24.14%	7	0%
	Regional/Local Chains	4	13.79%	6	-33%
	Independent Businesses	17	58.62%	15	13%

Change Analysis	New Vacancies	3
	Continued Vacancies	4
	Filled Vacancies	3
	Changes in Storefront Occupant	1
	Changes in Use	0

Commonwealth Avenue		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	53		53	0%
	Total Active Storefronts	45	84.91%	44	2%
	Total Vacant Storefronts	8	15.09%	9	-11%
	Total Vacancy Rate	15.09%		16.98%	-1.89%

Use Analysis	Restaurant Use	14	31.11%	13	8%
	Service Use	15	33.33%	15	0%
	Retail Use	8	17.78%	8	0%
	Institutional Use	8	17.78%	8	

Chain v. Independent Business Analysis	National Chains	11	24.44%	13	-15%
	Regional/Local Chains	10	22.22%	10	0%
	Independent Businesses	16	35.56%	13	23%

Change Analysis	New Vacancies	2
	Continued Vacancies	6
	Filled Vacancies	3
	Changes in Storefront Occupant	2
	Changes in Use	0

Coolidge Corner		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	224		223	0%
	Total Active Storefronts	186	83.04%	199	-7%
	Total Vacant Storefronts	38	16.96%	24	58%
	Total Vacancy Rate	16.96%		10.76%	6.20%

Use Analysis	Restaurant Use	46	24.73%	49	-6%
	Service Use	97	52.15%	101	-4%
	Retail Use	43	23.12%	47	-9%

Chain v. Independent Business Analysis	National Chains	37	19.89%	44	-16%
	Regional/Local Chains	35	18.82%	35	0%
	Independent Businesses	114	61.29%	118	-3%

Change Analysis	New Vacancies	17
	Continued Vacancies	21
	Filled Vacancies	3
	Changes in Storefront Occupant	7
	Changes in Use	0

JFK Crossing		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	59		59	0%
	Total Active Storefronts	57	96.61%	55	4%
	Total Vacant Storefronts	2	3.39%	4	-50%
	Total Vacancy Rate	3.39%		6.78%	-3.39%

Use Analysis	Restaurant Use	18	31.58%	18	0%
	Service Use	32	56.14%	30	7%
	Retail Use	7	12.28%	7	0%

Chain v. Independent Business Analysis	National Chains	8	14.04%	8	0%
	Regional/Local Chains	5	8.77%	5	0%
	Independent Businesses	44	77.19%	42	5%

Change Analysis	New Vacancies	0
	Continued Vacancies	2
	Filled Vacancies	2
	Changes in Storefront Occupant	3
	Changes in Use	0

Putterham		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	16		16	0%
	Total Active Storefronts	16	100.00%	16	0%
	Total Vacant Storefronts	0	0.00%	0	#DIV/0!
	Total Vacancy Rate	0.00%		0.00%	0.00%

Use Analysis	Restaurant Use	4	25.00%	4	0%
	Service Use	8	50.00%	8	0%
	Retail Use	4	25.00%	4	0%
Chain v. Independent Business Analysis	National Chains	1	6.25%	1	0%
	Regional/Local Chains	2	12.50%	2	0%
	Independent Businesses	13	81.25%	13	0%

Change Analysis	New Vacancies	0
	Continued Vacancies	0
	Filled Vacancies	0
	Changes in Storefront Occupant	1
	Changes in Use	0

St. Mary's Station		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20-'21
Occupancy Analysis	Total Storefronts	33		33	0%
	Total Active Storefronts	31	93.94%	30	3%
	Total Vacant Storefronts	2	6.06%	3	-33%
	Total Vacancy Rate	6.06%		9.09%	-3.03%

Use Analysis	Restaurant Use	11	35.48%	11	0%
	Service Use	16	51.61%	16	0%
	Retail Use	4	12.90%	3	33%
Chain v. Independent Business Analysis	National Chains	6	19.35%	6	0%
	Regional/Local Chains	7	22.58%	7	0%
	Independent Businesses	18	58.06%	17	6%

Change Analysis	New Vacancies	0
	Continued Vacancies	2
	Filled Vacancies	1
	Changes in Storefront Occupant	0
	Changes in Use	0

Washington Square

		2021 Survey	% of Total Storefronts	2020 Survey	% Change '20- '21
Occupancy Analysis	Total Storefronts	68		68	0%
	Total Active Storefronts	61	89.71%	62	-2%
	Total Vacant Storefronts	7	10.29%	6	17%
	Total Vacancy Rate	10.29%		8.82%	1.47%
Use Analysis	Restaurant Use	20	32.79%	18	11%
	Service Use	36	59.02%	39	-8%
	Retail Use	5	8.20%	5	0%
Chain v. Independent Business Analysis	National Chains	7	11.48%	7	0%
	Regional/Local Chains	7	11.48%	6	17%
	Independent Businesses	47	77.05%	49	-4%
Change Analysis	New Vacancies	4			
	Continued Vacancies	3			
	Filled Vacancies	2			
	Changes in Storefront Occupant	2			
	Changes in Use	0			