

- KENDAL BID LTD -

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BUSINESS PLAN

THE WAY **FORWARD**

.....

2019 - 2024

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Making A Difference To Our Town

Simon Thomas, ***Chair of Kendal BID***

Kendal Business Improvement District is a business led initiative, for businesses and led by businesses. We exist to ensure that Kendal prospers. As a business person with two businesses in town, I have every reason to ensure that Kendal BID succeeds.

I have been on the BID Board since the beginning, enjoying the challenges and relentlessly pushing the positives about Kendal. We have so much to shout about and so much to be proud of; fantastic places to eat and drink, amazing shopping experiences, vibrant cultural offerings and most of all great people and great businesses.

Kendal BID has been at the forefront of so many great things that have added value to the town and as a business led board, we are proud that so many of Kendal's businesses have embraced the positive changes. Our festivals are growing year on year, with the support of Kendal businesses and its time that we look to the future and embrace everything that is amazing about our town and shout it from the hill tops.

Sarah Williams, ***Kendal BID Manager***

Kendal is my home town and it has been a privilege to have worked alongside such an amazing and positive business community over the last four years. Looking forward, the proposals for the next 5 years will build on these foundations and enable Kendal to take advantage of the numerous opportunities around UNESCO World Heritage Status. We are in the perfect position to prosper and grow.

Kendal BID is committed to positive news about Kendal, good news stories and reasons to visit our town and to shop with local businesses. We believe that Kendal is worth shouting about and worth telling visitors about. We are focused and relentlessly positive. Being business led, we can think out outside the box and react quickly and firmly believe in getting value for money.

The renewal of Kendal BID will not just mean more of the same but a chance to grow on Kendal's share of tourist revenue and promote it as a destination in its own right. We will continue to listen to what our levy payers want us to do on their behalf.

I hope that there will be a new BID for Kendal because I can see the consequences of taking over £100,000 out of the local marketing budget. So many good things have been funded by BID with your levy payments that we would all like to see it continue.

The Impact & Achievements of Kendal BID 2014-2018

MARKETING & PROMOTION OF KENDAL “WE PROMISED TO BRAND, MARKET AND PROMOTE KENDAL AS A CENTRE FOR RETAIL, SERVICES, LEISURE AND TOURISM, INCLUDING BETTER USE OF DIGITAL AND MOBILE TECHNOLOGIES AND EXTENDING CULTURAL ACTIVITIES, FESTIVALS AND EVENTS”

SUPPORT BOTH FINANCIALLY AND THROUGH LOBBYING FOR THE TOWN'S KEY FESTIVALS

- **Comic Art Festival** 18,000 attendees and the number of local people participating has grown by around 30%.
- **Food Festival** generated £1.5 million in to the local economy, £480,000 of local, national and international PR plus training.
- **Kendal Mountain Festival** over 18,000 tickets sold, in excess of 31,000 social media followers, 74,000 website visitors and 4 million TV viewers. “Kendal BID funding is extremely essential for keeping the Festival running and gives us confidence to expand outside of only using the Brewery Arts Centre and into other venues in the town. It also ensures we are able to continue to grow the Festival in the best way that supports the local community. **On the back of the funding we are now looking at running a summer Festival** that will bring in new audiences into the town and increase the town’s profile as an innovative and diverse place to visit.”
- **Torchlight Carnival** On average, £17.65 was spent per person on the Friday night Procession and on Saturday £22.91. People in town for the event also engaged in other activities. On Friday night, 61% said they would be going for a meal or a drink, and 45% were generally sight-seeing. On Saturday, 46% were going for a meal or a drink and 46% also went shopping. 83% gave the town centre experience and public realm a positive rating.
- **MintFest** attended by 22,000 people.
- **Paines Plough** presented ten performances over four days and attracted nearly 1,400 people into the town.
- **Lakes Alive** 39,511 people attended lakes Alive in 2017 over 14 days in and around Kendal
- **The International Comic Arts Festival** “People refer to the festival as “are you going to Kendal” more than “are you going to Lakes International Comic Art Festival / the Lakes” which is interesting as Kendal isn’t, of course, in the title! Social media activity is very high as it is across the comic art world and Kendal is regularly mentioned in tweets and posts. People reflect on their experience of the place as well as the festival and mostly see it as one and the same thing. I would boldly claim that the level of awareness of Kendal (its existence on a world stage) and its offer as a town to visit, work in etc. has been raised hugely” - International Comic Arts Festival
- **Christmas campaigns** substantial Radio campaigns over 3 years, including prime time shop local.
- **Social Media Campaigns** including creation of Kendal Mintcake & more
- **Victoria Bridge** reopening and substantial PR using social media, including 10,000 people downloading our Batman and Robin video.
- **Summer Trails and Christmas Trails** over 15,000 people participated in the trails in 2017 and that record is set to be broken in 2018 with the new RAF Woolly Wordsearch Trails, designed to get people moving around all corners of the town.
- **BUBB.AL** Town centre app Bubb.al trialed but take up was not good enough to continue
- **Post Flood Campaign** saw Kendal BID producing bottles of water and sending them to various famous people ‘we have enough so we are sharing some’, we got Radio 2 exposure

- Major funder and contributor of the Visit-kendal.co.uk website both in its creation and its continued development and publicity. It receives 6,000 visitors a month.
- [Rediscover Kendal Day](#) up to 3,000 people joined in with the Rediscover Kendal day with people being asked to follow a trail, collect the stamps and see if they could win a gift card to be spent in the local economy.
- [Manchester and London Window campaigns](#) led to prominent window displays in London and station A Board adverts in Manchester and Liverpool to encourage people to come by train.
- [Kendal Branding](#), Kendal BID was a major contributor to Kendal Branding and continues to utilise this in everything it does.
- [Spitfire Display](#) A replica spitfire was displayed in mid-August to help the town celebrate the RAF 100 celebration, with a supporting competition - this attracted 3000 more visitors to the town in addition to high levels of social media activity.
- [Malcolm Wilson Rally Car](#)- we brought in hundreds of people and got people talking about Kendal by displaying a Malcolm Wilson rally car and having Malcolm Wilson answer questions in person.

The Impact & Achievements of Kendal BID 2014-2018

CLEAN, SAFE & ATTRACTIVE YOU ASKED US TO “TAKE PRIDE IN KENDAL BY LOOKING AFTER THE WHOLE TOWN CENTRE, INVESTING TIME AND RESOURCES WHERE IT IS NEEDED TO ENHANCE ITS APPEARANCE, AND ENSURING THAT AN ATTRACTIVE, WELCOMING ENVIRONMENT IS MAINTAINED FOR WORKERS, RESIDENTS AND VISITORS ALIKE”

- [Healthy Highstreets Programme](#), we competed to become part of the Healthy Highstreets program and were able to gain support from the larger businesses in the town.
- [Festive Lighting](#), we extended the Christmas Tree lights to include Sandes Avenue and Blackhall Road, completing a sustainable infrastructure for future lights to continue and gaining approval from Kendal Town Council to take over in future years. We put the infrastructure in for Christmas trees and provided mini solar powered xmas trees for those that wanted them for the last 2 years. We provided funding for the lights switch on and created 4 Son et Lumiere shows and Christmas entertainers.
- [Kendal In Bloom](#), we put in hanging baskets so that businesses could join in with Kendal in Bloom in future years and organized for 20 businesses in 2018 to get discounted hanging baskets.
- [Windows Arts Trail](#), we fund the Windows Arts Trail.
- [The Umbrella display's and the woolen spitfire displays](#), we created and invented the 2017 umbrella displays that attracted media coverage and visitors to the town. In 2018, we created and commissioned the Woolen spitfire displays. We also provided bunting throughout the town to celebrate the RAF100 and supported the RAF Cadet parade.
- [20 lockable and secure bike boxes](#), for Kendal to support the need for cycling.
- [3 new passenger shelters](#) to make it more comfortable for customers to use public transport.

The Impact & Achievements of Kendal BID 2014-2018

ENTERPRISING & COMPETITIVE YOU TOLD US YOU WANTED US TO “TO INVEST IN PEOPLE AND BUSINESSES TO CREATE AN ENTERPRISING AND COMPETITIVE KENDAL WHERE THE CREATIVITY AND AMBITION OF ENTREPRENEURS ARE POSITIVELY ENCOURAGED CONTRIBUTING TO A REVITALISED TOWN CENTRE”

- **Pop-Up Shops**, Kendal BID actively promoted the pop up shop idea and asked South Lakeland District Council (SLDC) to progress with their owned units.
- **Swipii Loyalty and Marketing** Manager with over 20,000 people signed up and regularly using, businesses saw **£280,000** as a direct result of Swipii campaigns in one year.
- **We trained businesses in social media** and gained funding to do it through Kendal College and People 1st
- **We continuously work with key partners** and held a formal privately funded networking function to encourage positivity about Kendal.
- **We procure services** where possible from BID levy payers.
- **The Kendal Gift Card** has over 150 participating businesses in the town including the nationals. It is available for all businesses that accept Mastercard. We are now in talks with the Westmorland Shopping Centre to ensure that the Gift Card is accepted as a centre-wide card.

Proposals for a 5-year renewal of Kendal Business Improvement District

WHY SHOULD KENDAL BID CONTINUE?

In 2013 Kendal's business community democratically voted to deliver a programme of improvements under the auspices of a not-for-profit organisation called Kendal BID Limited. The proposition was to follow a 5-year business plan that would help combat the ever present economic trends of low economic growth, out of town developments and on-line sales. This is not just a Kendal issue, the majority of highstreets were and are facing similar issues, many are externally driven. BID can mitigate those changes. National decisions to blanket close local stores have been out of our control, despite these challenges Kendal remains above the average national occupancy rates and Kendal BID has kept Kendal on the map by continuously creating an exciting vibrant environment helping to attract many businesses over the last 4 years.

- A 2018 footfall counter, supplied by Kendal Futures, placed outside WH Smiths showed a 60% increase in summer footfall from 2017.

Kendal BID's presence has helped provide businesses with choices on helping to combat some of these trends and without it we are of the firm belief that things would be far worse. Many businesses that have embraced the tools for improvement have reaped the rewards;

- An example is the SWIPIII loyalty scheme which has provided a proven £280,000 of revenue into the local economy in 2017 alone, with over 21,000 consumers regularly using local businesses.

Kendal BID Limited has a strong private sector board, with public sector representation to fulfil our ethos of a partnership approach.

- This partnership approach has put us in a strong position to lobby on your behalf and gain additional funds, external to the BID levy such as funding for the provision of passenger shelters using leverage from bike box

One issue is that some of the lobbying carried out by the BID on Kendal's behalf has gone unrecognised. Kendal BID has achieved much compared to other Business Improvement Districts of similar, and even larger, sizes and budgets.

- Kendal BID Limited does not have any employed staff and relies on contracting in services it requires with limited resources as it seeks to keep to a minimum the necessary costs of management and administration.

Kendal suffered as a result of the 2015 floods, not helped by negative news which continuously told people that the town was in a devastated position for numerous months after. Our town has recently seen a lot of discussion regarding a lack of parking which told potential visitors not to bother coming to Kendal as you wouldn't be able to park. Both these elements we tried to combat by continuously promoting the positives;

- Kendal is amazing.
- Kendal has multitudes of fabulous independent and national businesses.
- Kendal is beautiful and full of heritage and cultural wonders and most of all Kendal has its people, resilient and welcoming. Kendal has to recognise that it still has to continue to combat the negatives and build on the positives.

Without the continuation of the BID, the future for Kendal could be a bleak one.

- A new five-year proposal based on constructive feedback, including the recognition that we didn't always get it right and consulting with the business community has been developed to help Kendal grow and prosper in what looks like being an even more challenging time ahead.

Over 300 BID's are now in existence in the UK, demonstrating the need to adapt to the change in consumer behavior and expectations.

WHAT DID THE CONSULTATIONS HAVE TO SAY ABOUT KENDAL BID?

- A volunteer advisory group, separate from the BID Board, was formed in the initial stages of renewing the BID to advise on how to take things forward. They decided that a small booklet needed to be produced that summarised Kendal BID activities over the last 4 years. This was then distributed by hand to all BID levy payers. The advisory Group and the Kendal BID Limited Board felt that it was really important to carry out independent research.

(A full copy of the research and booklet can be found on www.kendalBID.co.uk)

KEY POINTS FROM INDEPENDENT RESEARCH

Research was conducted from through March 2018 and April 2018. The researchers were tasked with 5 specific objectives;

- 1- *Capture views on the performance of Kendal and its performance as a trading environment*
 - * 50% of those asked felt that the trading environment was great/good improving versus 15% who thought that the town was in decline of whom 11% blamed it on accessibility and parking.
 - * The research also confirmed that the top 6 things of particular importance to our business owners/managers were (in no particular order);

Parking • Accessibility • Cleanliness • Footfall • Promotions and Marketing • Events

One of the most important things for traders was identified as town centre parking, which is still seen by them as one of the town's major disadvantages. With the closure of New Road to cars, Kendal BID helped to mitigate the closure by lobbying for £1 a day parking but recognises that it has a further key job to influence SLDC

and Cumbria County Council (CCC) to provide additional parking. Kendal BID has been asked to comment on the SLDC studies being carried out with regards to parking.

* In the last 12 months, 3 in 10 businesses said they have experienced improvements to their businesses and 4 in 10 felt that it had stayed the same. Of those that said business had improved, they attributed it to greater involvement with the events, branding, marketing, promotions, and that people are more aware of what Kendal has to offer. Deterioration in business performance was in the main due to external factors such as less disposable income, effects of Brexit and low footfall. However, town centre parking remains a major concern for our levy payers (66% of those interviewed).

2- *Levy payers' awareness & knowledge of the BID and its activities:*

* Over half the surveyed businesses were quite knowledgeable or very knowledgeable about the BID but there is still scope for us to increase the awareness of what the BID has achieved. We are guilty of not ringing our own bell and we recognise that we need to rectify this over the next few months, taking credit where credit is due. It was not a surprise that we were also associated with activities that are council led such as the restoration of the Market Place.

* When prompted, businesses knew that BID was responsible for the Kendal Gift Card, Swipii and many promotions including the trails and umbrella displays.

3- *Expectation of the BID & to what extent these have been met;*

* Many businesses felt that BID has had a positive impact on the town, but it was not universal. Notably, businesses on the outskirts of the zone felt they had not received enough attention. Since the survey we are putting all correspondence in envelopes marked as a communication from BID. All communications have always had full contact details on for the BID Manager and with one of the largest BIDs in the country (heritaments versus levy received) it can be challenging to regularly visit all members. The BID continues to work to make its communications as effective as possible. Just over half of the businesses surveyed felt we had partially met their expectations.

4- *Establishing the perceived value of the BID and its activities;*

* The most important function of the BID for the majority of businesses is its role as a lobbyist on behalf of the traders and its activities around marketing and promotions.

* Businesses also felt that supporting events and festivals was also an important BID role.

5- *Suggestions for Future activities/ benefits provided by the BID;*

* Continuing to fund various promotions and events is key to businesses in Kendal as well as thinking of innovative ways to get people moving around the town. There were prompted suggestions which were well received such as making the town more accessible and inclusive to everyone, improving the tourist information offering, more events etc.

Positive Views on the Kendal BID;

* 3 in 5 businesses say that the BID has been a valuable initiative in the town centre because it provided different activities, brings businesses together and encourages footfall.

KEY POINTS FROM THE DROP SESSIONS

Four drop-in sessions were held, these sessions were organised on 26th, 28th, 29th and 30th May, where businesses were invited to come and provide feedback and suggestions for a future BID proposal. The key amalgamated proposals from these sessions were as follows:

1. *Networking Groups* - Would like to see BID pulling together some networking groups.
2. *Website* - visit-kendal.co.uk – further enhancements needed to make more user-friendly and include interactive map and local information.
3. *Lobbying* - Businesses want to see us more visibly lobbying on their behalf. They want to know how and what SLDC are doing to attract inward Investment.
4. *Entertainment* - more events that bring the town to life.
5. *Retail units* – BID to encourage retail units to become more attractive and empty shops to showcase the town's goods.
6. *Infrastructure* - Public toilets need to be made a priority of BID as do other infrastructure programmes such as coach parking. Actively bringing coach parties into Kendal.
7. *Reinstate a Kendal Chamber of Trade* that co-exists with Kendal BID as in Penrith, this successful partnership could be mirrored.
8. *Bring the streets* on the outskirts in by providing banners.

A CONTINUED VISION FOR KENDAL

The Kendal BID vision is to create a well-promoted, economically viable, attractive and vibrant town that serves the needs of its community, visitors and the businesses themselves by taking advantage of Kendal's strong position as one of the best places to live in the UK in one of the most beautiful areas in the world.

AIM AND PURPOSE

The main aim of renewing the Kendal Business Improvement District for a second term is to fulfil the vision set out above. The purpose of which is to deliver a programme of activities and projects that will seek to contribute to that aim.

OBJECTIVES

In its second term, Kendal BID would like to simplify its offering, become more focused and centre its objectives around 3 main areas;

OBJECTIVE 1: VOICE FOR BUSINESS

To strengthen Kendal BID as a voice for businesses by championing the priorities of business and by working with others to ensure Kendal remains a place which is fit for business;

OBJECTIVE 2: FIRM FOUNDATIONS

To invest in the town infrastructure to ensure that the town is a great place to live, work and visit;

OBJECTIVE 3: KENDAL IS A DESTINATION

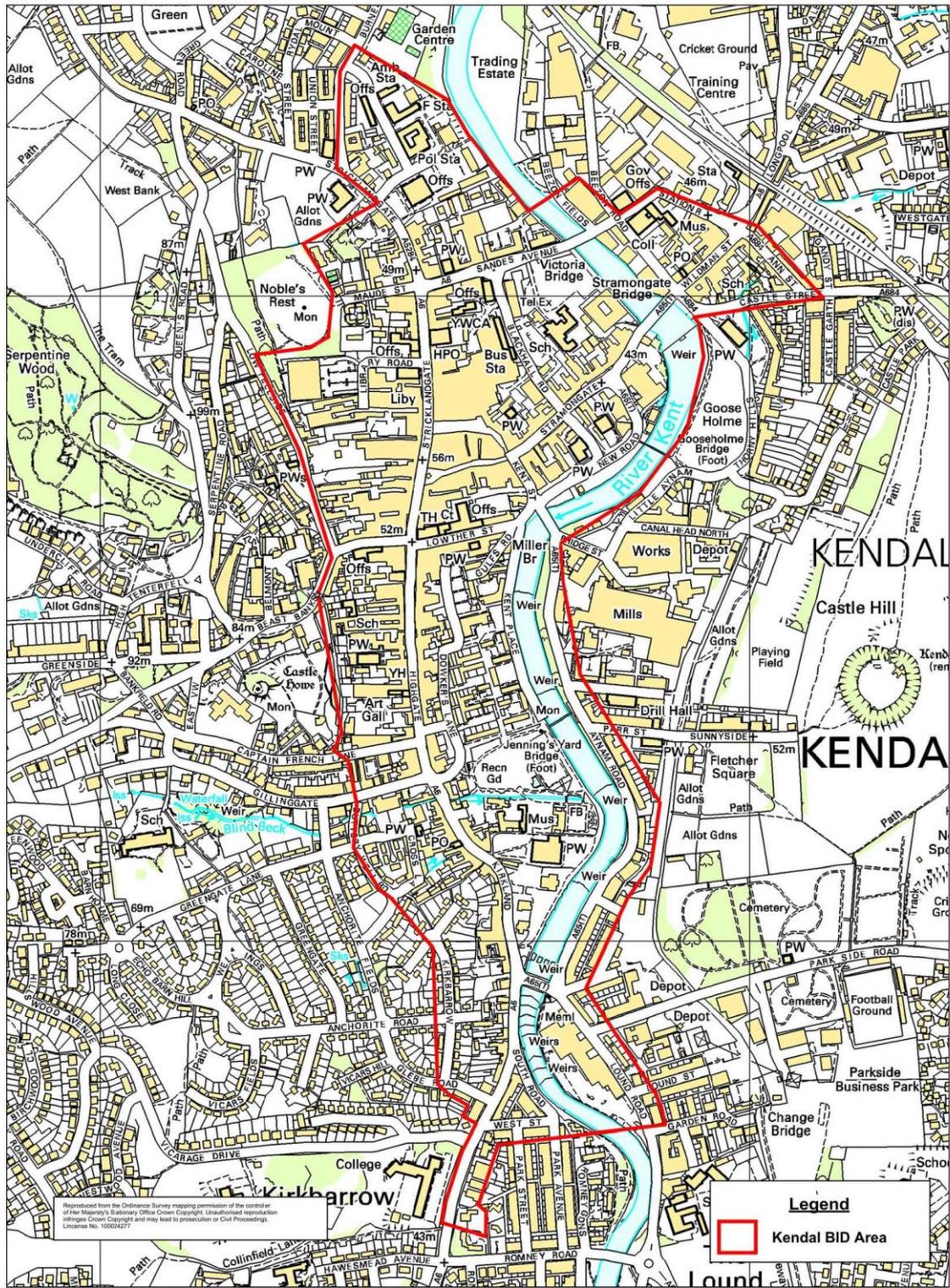
To proactively market Kendal as a destination rather than a gateway, this will be done through a focus on local and visitor tourism, marketing, brand Kendal, support of festivals and other Kendal-centric schemes.

THE BID AREA

The BID area will remain the same as previously, consultation did not bring forward any strong desire to change the boundaries. If the BID is successful, several other businesses have pledged that they will opt in for the duration of the next 5-year term.

The BID includes the whole or part of the following town centre streets and yards:

Abbot Hall	Finkle Street	Melrose Place
Allhallows Lane	Gillinggate (Part)	Milnthorpe Road (part)
Ann Street (part)	Gulfs Road	New Road
Aynam Road (part)	Highgate	New Shambles
Beezon Road (part)	Finkle Street	Old Shambles
Berry's Yard Blackhall	Gillinggate (part)	Peppercorn Lane
Road Blackhall Yard	Gulfs Road	Riverside Place
Branthwaite Brow	Kent Street	Sand Aire House
Bridge Mills	Kent View	Sandes Avenue (part)
Busher Walk	Kirkland	South Road Station Road (part)
Buttery Well Road	Library Road	Stramongate
Captain French Road (part)	Lound Road (part)	Stramongate Bridge
Castle Street (Part)	Low Fellside (part)	Stricklandgate
Cross Lane	Lowther Street	Westmorland Shopping Centre
Dowkers Lane	Market Hall	Wainwright's Yard
Elephant Yard	Market Place	Wildman Street
	Maude Street	Woolpack Yard



A 5-YEAR PLAN FOR IMPROVEMENT

Kendal BID will continue to support many of the activities and projects that have been successful over the last 4 and a bit years; specifically, those activities around the promotion and marketing of Kendal as a destination and further lobbying. It will also aim to deliver its further objectives.

Below are a set of projects and activities that will respond directly to the comments and priorities provided by our business levy payers in the BID area.

PRIORITIES IDENTIFIED BY BUSINESSES	BID RESPONSE
Businesses want Kendal BID to lobby on their behalf and promote Kendal to everyone in innovative ways	A VOICE FOR BUSINESS To strengthen Kendal BID as a voice for businesses by championing the priorities of business and by working with others to ensure Kendal remains a place which is fit for business
Businesses want Kendal BID to build sustainable firm foundations to place Kendal as an accessible place to come and enjoy.	FIRM FOUNDATIONS To invest in the town infrastructure to ensure that the town is a great place to live, work and visit;
Businesses want Kendal BID to market and promote Kendal as a Destination	KENDAL IS A DESTINATION To proactively market Kendal as a destination rather than a gateway, this will be done through a focus on local and visitor tourism, marketing, brand Kendal, support of festivals and other Kendal centric schemes

Underlying all of our projects, aims and objectives Kendal BID will ensure equality and diversity is at the forefront of everything it does. The proposed BID response will form a programme of projects and activities to be delivered under the following headings;

PROJECT ONE: A VOICE FOR BUSINESS

RESPONDING TO PRIORITIES:

Consultation with businesses identified the need for Kendal BID to be the main organisation for helping put the business views across when decisions are being made by local government. Underlying this priority is the need to communicate with levy payers when we are lobbying on their behalf. Business owners told us that one of the most important functions of the BID should be lobbying on behalf of the towns businesses. In particular lobbying on issues such as parking, infrastructure and tourism.

OBJECTIVE:

To continue and strengthen Kendal's business voice by building on relationships with, not only public bodies, but the wider business community. Kendal's businesses will have the opportunity to be heard through Kendal BID. The BID Board will continue to communicate on relevant issues.

PROPOSED ACTIONS:

- a. Kendal BID will continue to invite representation from CCC, KTC and SLDC to be members of its board and each board meeting will have a section where relevant information from these organisations will be dealt with.
- b. A robust system of feedback (via representation) will be created to ensure that BID levy payers in all sectors can have their say - this will mean that all sectors will be represented on the board and there will be a direct sector feed for businesses to express their views.
- c. Sector board representatives will feed back directly via a new area that will be created on the kendalBID.co.uk website. A system will be created to ensure this works effectively.
- d. To resurrect the Kendal Chamber of Trade, whose purpose is to co-exist with Kendal BID and provide free Kendal-centric services for businesses in and out of the BID zone. The Kendal Chamber of Trade will complement Kendal BID and will provide services such as networking, skills and knowledge provision and bringing businesses together. This relationship will also help ensure that the Kendal BID area is not isolated from the rest of the town.

PROJECT TWO: FIRM FOUNDATIONS

RESPONDING TO PRIORITIES:

Businesses told us that the town needed action to create a firm foundation on which to grow and that certain things needed to be in place to allow that.

OBJECTIVE:

To provide a strong robust Firm Foundation - ensuring that, with the arrival of UNESCO World Heritage Status, Kendal becomes much more than a gateway but a destination, and is equipped to take on that role through ensuring the town has aesthetic appeal and also attracts and retains visitors and locals

PROPOSED ACTIONS:

- a. Kendal BID will continue to support and upgrade the Visit-Kendal website, ensuring it is fit for purpose, easy to use and that businesses are engaged in populating it. A separate forum will be provided for businesses to pass on comments/suggestions.
- b. A programme designed to improve the aesthetic appearance of empty units whilst advertising other businesses will be created. Shop windows become shop windows for Kendal.
- c. Consumer loyalty and rewards schemes will be supported and developed further.
- d. Kendal BID will work towards lobbying for the lost infrastructure such as toilets, coach parking, and further facilities for events.

PROJECT THREE: KENDAL IS A DESTINATION

RESPONDING TO PRIORITIES:

Consultation with businesses via desk, telephone and drop in sessions revealed that businesses saw Kendal BID's role as a promotional one, (41% of businesses responding to the research saw this as very important). Businesses saw the support of festivals, the continuation of trails and exhibits as essential.

OBJECTIVE:

To proactively market and promote Kendal as a destination rather than a gateway, this will be done through a focus on local and visitor tourism, marketing, brand Kendal, support of festivals and other Kendal centric schemes such as the support of the new Tourist Information Centre 'Fantastic Kendal'.

PROPOSED ACTIONS:

- a. Kendal BID will continue to support the existing festival programme to ensure that the existing festivals are able to draw down as much match funding as possible, ensuring their survival and growth as well as publicity and footfall benefits for the town. Figures from the festival impact studies will be published. A review will be held after 3 years.
- b. Kendal BID will continue to develop innovative ways in which people can discover all that Kendal has to offer (exhibits, trails, leaflets etc).
- c. Kendal BID will work with coach companies and Cumbria Tourism to ensure that the best is made of Kendal to the wider public with regards to UNESCO World Heritage Status. We will form a robust partnership with the organisations responsible for ensuring the benefits of UNESCO World Heritage Status are felt in Kendal (Lake District National Park Authority (LDNPA) etc). Kendal BID will work towards being the main overspill for the increase in tourism to the national park and will do this through initiating partnerships with organisations such as Friends of the Lake District.
- d. Kendal BID will continue to support individual sectors with innovative means of advertising them.
- e. Kendal BID will actively campaign to ensure take up of the Kendal branding is more widely spread.
- f. Kendal BID will support the implementation of a new Tourist Information Centre 'Fantastic Kendal' that focusses on attracting people into Kendal and keeping them here (offering services for the major tourist attractions, accommodation providers, Kendal Ambassadors, Kendal-centric products and ensuring universal access to the facility.)

FINANCIAL PLAN

FUNDING

Kendal BID's income over the next 5 years will come from levy payments from the BID area businesses and some opt-in levy income. An estimation of other sources of income will be provided.

There will be a levy charged to each qualifying ratepayer calculated at 1% of the rateable value using the most current Non-Domestic Rates list. The BID levy will be set by 1st March 2019 for the full 5-year term of the BID. The Kendal BID area (as previously shown) is forecast to include 693 hereditaments (properties with a rateable value), with an aggregate Rateable Value (RV) of £13,872,605. The BID levy is therefore expected to raise £138,726.00 gross each year. Which means that over the 5-year term we can raise over £693,630.00 that will be spent on added value activities and projects designed to boost the local economy. 604 of levy paying businesses will be required to pay a levy that's either equivalent to, or less than, £1 per day.

ADDITIONAL FUNDING

Kendal BID has attracted further funding either through voluntary contributions, private contributions or grants.

A realistic forecast, based on previous experience, is an additional £25,000 over the lifetime of the renewed BID, anything above will be a bonus.

EXPENDITURE

The estimated programme of expenditure will be divided amongst each objective and actions, the Kendal BID Board may wish to reallocate monies between the different expenditure pots if required. It will be a decision made at Board level but there will always be a degree of flexibility between the different expenditure pots. Managing and implementing the BID, including accountancy fees, insurance, collection fees and BID Management will be up to a maximum of 20%.

The fee for the collection of the BID levy, is estimated by South Lakeland District Council to be up to £11,000 per year in the first year, with some allowance for inflation in years 3-5. The forecast expenditure plan has been calculated using the most current rateable values (01/3/2018).

BID FORECAST FOR THE NEXT 5 YEARS 2019-2024

	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Levy income	£138,726.00	£138,726.00	£138,726.00	£138,726.00	£138,726.00
other	£5,000.00	£5,000.00	£5,000.00	£5,000.00	£5,000.00
carry over	£5,000.00				
Totals	£148,726.00	£143,726.00	£143,726.00	£143,726.00	£143,726.00
Expenditure					
A voice for business	£5,000.00	£5,000.00	£5,000.00	£5,000.00	£5,000.00
Kendal is a Destination	£65,600.00	£61,700.00	£62,000.00	£62,000.00	£54,400.00
A Firm Foundation	£50,000.00	£50,000.00	£50,000.00	£50,000.00	£50,000.00
Sub totals	£120,600.00	£116,700.00	£117,000.00	£117,000.00	£109,400.00
Bid Running Costs	£13,120.00	£12,340.00	£11,900.00	£11,900.00	£10,280.00
Levy Collection	£11,000.00	£11,000.00	£11,500.00	£11,500.00	£11,600.00
Sub total	£24,120.00	£23,340.00	£23,400.00	£23,400.00	£21,880.00
Totals	£144,720.00	£140,040.00	£140,400.00	£140,400.00	£131,280.00
Contingency	£4,006.00	£3,686.00	£3,326.00	£3,326.00	£12,446.00

*This is an estimate of the funds carried over from Kendal BID Limited accounts 2019.

COST TO EACH BUSINESS

The cost to each business will be proportionate and equitable. The levy rate will continue to be a simple calculation based on 1% (one percent) of the property's most current Rateable Value at 1st March 2019. Businesses will only be charged if they have a rateable value of £3,000 or more. Businesses who receive rates relief will still pay the BID levy at 1% of the rateable value.

Rateable Value (RV)	RV @1%	Weekly Cost Equiv	Daily cost Equiv
£3,000	£30.00	£0.58	£0.08
£4,000	£40.00	£0.77	£0.11
£5,000	£50.00	£0.96	£0.14
£10,000	£100.00	£1.92	£0.27
£25,000	£250.00	£4.81	£0.68
£35,000	£350.00	£6.73	£0.96
£45,000	£450.00	£8.65	£1.23
£60,000	£600.00	£11.54	£1.64
£100,000	£1,000.00	£19.23	£2.74
£120,000	£1,200.00	£23.08	£3.29
£150,000	£1,500.00	£28.85	£4.11
£500,000	£5,000.00	£96.15	£13.70

MANAGEMENT OF THE BID

BID PROPOSER

The proposal to renew the Business Improvement District for a further 5-year period is being proposed by Kendal BID Limited whose board is made up of local business people who are giving up their time for free for this important initiative. Kendal BID Limited is a private not-for-profit limited company whose sole purpose is to ensure that the levy is spent wisely in the promotion and marketing of Kendal according to the Kendal BID Business Plan. The BID Board represents the levy-paying businesses and organisations of the Kendal BID and is held to account through an Annual General Meeting of levy payers.

The board members taking forward the renewed BID proposal include:

SIMON THOMAS (Chair), The Blind Bus Driver Limited
 BRIAN HARRISON (Vice Chair), B&M Harrison Financial Services
 DANIELLE WALLS, Hayton and Winkley Solicitors
 JAN MOFFAT, Kendal Youth Hostel
 PETER GAYNOR, Manager of the Westmorland Shopping Centre
 RICHARD MOORE, Temple Heelis Solicitors
 ELOISE HEALY, Retro Circus and Food Nude
 DEREK ARMSTRONG, Cumbria Chamber of Commerce

BID MANAGEMENT

Kendal BID, if successful in its renewal, will continue to be managed by Kendal BID Limited, with a newly elected board of Directors. We will be asking BID members if the quorum can be set at 4 votes. As previously mentioned, the hope is that representation from all main sectors will be present on the new board. The sectors are as follows, identified previously;

Large Retailer
Small Retailer
Food and Drink
Professional Services
Third Sector
Night Time Economy
Leisure and Hospitality

All businesses eligible to vote in the BID ballot will be invited to nominate themselves or other eligible persons to be considered for directorship of the BID Company and oversee the delivery of the BID in the coming years. The new company will continue to be registered for VAT and accounts will be submitted.

- The levy will continue to be collected by SLDC and transferred by an Operating Agreement to Kendal BID Limited.
- A monthly board meeting will continue to be held and minutes displayed on the Kendal BID website.
- An Annual General Meeting will be held with all BID Members being given the required period of notice for meetings.
- Newsletters and communications will continue to be distributed by hand on a regular basis, to keep members up to date on the activities of Kendal BID

PERFORMANCE MONITORING & EVALUATION

Kendal BID Limited is a member of British BIDs, the recognised body and standard holder for BIDs across the country, providing advice and guidance and best practice and training for Board members and managers where needed.

As with the existing Kendal BID the performance and effectiveness of the renewed BID will need careful monitoring to ensure that BID levy payers can see how their money is being spent throughout the 5-year term. Kendal BID Limited will be subject to the same scrutiny as any other limited company, providing annual company accounts to Companies House and quarterly VAT returns. We will and always have gone above and beyond by ensuring that anyone wanting sight of the full accounts can do so.

Its directors also must, by law, run the company in good faith.

As with the existing Kendal BID, all decisions will be made available for the scrutiny of its levy payers through the online publication of the monthly board meeting minutes. Financial contributions to events and activities from the BID monies are carefully monitored, a system is already in place to ensure that beneficiaries of support follow strict criteria and provide supporting materials for post scrutiny.

It is anticipated in order to get commitment and leverage for other funds external to BID, existing festivals will be given a funding allocation for the next full term of the BID with a review after 3 years. All beneficiaries of financial support are given a set of outputs that they must achieve in order to gain funding. A number of key performance indicators will monitor the effectiveness of the BID activities examples of these are; increase in year on year footfall at key points in the town, decrease in empty shop units and increase in effective marketing promotions.

BID LEVY RULES & MANAGEMENT

ELIGIBILITY TO VOTE

The Ballot Holder (the Returning Officer of South Lakeland District Council) will engage Electoral Reform Services (ERS) to carry out the ballot process. An initial canvass of ballot papers will be held in order to ensure that the ballot papers are going to the correct addresses. Once the checks are complete, the ballot will be conducted through a confidential postal vote. Ballot papers will be sent to all persons entitled to vote, defined as Non-Domestic Ratepayers for hereditaments within the defined Business Improvement District where the Rateable Value of the property is £3,000 and above, and who are ratepayers on the day of the publication of the 42 days' notice of the BID ballot. The vote will be one vote per hereditament within the BID area. If a levy payer is liable for more than one hereditament then they will be eligible to vote for each premises that falls within the BID area.

WHO PAYS?

A levy of 1% (one percent) of Rateable Value will be charged to each qualifying ratepayer using the most current Non-Domestic Rates list to calculate the amount payable. The BID levy rate will be set on 1st March 2019, with the levy rate calculation based on the most current Non Domestic Rates list. The BID levy rate calculated for each individual hereditament may also be updated because of changes in ratepayer, appeals, additions or removals. If a new ratepayer occupies an existing hereditament in the BID area within the 5 year term, they will be liable for the BID levy until the end of that term, even though they did not vote on it in the initial election. If a new rateable premises is created within the BID area within the 5 year term, the occupier must also pay the BID levy. BID levy will be payable on a pro rata basis, if a business ratepayer occupies the premises for part of a year. The BID levy will not be affected by a ratepayer's eligibility for Small Business Rate Relief or Charitable Rate Relief and there will be no discounts. The registered non-domestic ratepayer will be entitled to vote and obliged to pay the BID levy with no void period. The only exemption of not paying the BID Levy within the BID area are businesses that have a rateable value under £3,000. Liability for the levy should be that of the ratepayer where it is untenanted.

HOW LONG WILL IT LAST?

If the renewal vote is successful this time, then Kendal BID will continue until 15th March 2024. The BID can continue indefinitely subject to further successful renewals at ballot at least once every 5 years.

HOW WILL FUNDS BE COLLECTED?

In compliance with the Business Improvement Districts (England) Regulations 2004 the funds will be collected, and ring fenced into a Revenue Account and subsequently transferred to Kendal BID Limited to enable the delivery of the Kendal BID Business Plan 2019 - 2024. South Lakeland District Council will be responsible for the collection and enforcement of the BID Levy. The BID levy is a statutory charge and will be collected annually.

WHO WILL BE ACCOUNTABLE FOR THE BID FUNDS?

Kendal BID Limited and its board of Directors will be accountable to the BID levy payers and the successful delivery of the Kendal BID Business Plan 2019 - 2024. The geographical boundary of the Kendal BID area and the levy percentage rate cannot be altered within the 5-year term of the BID without an alteration ballot. There is however flexibility within the

management of the projects and activities in terms of allocations of costs and timescales noted in the business plan. These can be changed following a majority vote of the Board members.

THE BID BALLOT TIMETABLE

The BID Ballot Timetable

Tasks and Activities	Indicative Timescale
Consultation on BID proposal	February - August 2018
Notice of intention to hold a ballot sent to secretary of state and billing authority	24 July 2018
SLDC approval for ballot	10 September 2018
Publication Of Notice of Ballot by SLDC (Ballot Holder)	18 October 2018
Complete proposal and distribute to businesses (BID Proposer)	18 October 2018
Ballot commences (28 days)	Thursday 1 November 2018
Day of Ballot – Final date for submission of votes	Thursday 29 November 2018
Issue of Result by 5pm	Friday 30 November 2018

WHAT WILL HAPPEN IF KENDAL BID DOES NOT CONTINUE?

It's simple. Kendal BID was put in place to add value to Kendal, so all the projects and activities funded by the levy will cease to exist from March 2019.

NO MORE MARKETING AND PROMOTIONS FOR KENDAL, SO THAT MEANS;

- No more summer trails
- No more Christmas trails
- Risk of the Kendal Website not continuing
- Risk of the 'Welcome To Kendal' leaflets not continuing
- No more support of the Christmas lights switch-on and no more Christmas trees
- No Kendal Gift Card
- Reduced Swipii scheme- so limited loyalty scheme
- No more advertising in the Central Lakes (vital with the onset of UNESCO World Heritage Status)
- No more unique town displays that attract thousands
- No more advertising campaigns in national and local press
- No more support for Festivals and Events

BID support is vital for the festival and event's organisers, they use the money and the 'voice' of the BID to gain additional funding. The festivals are a major part of the town's identity and bring much needed income into the local economy:

- Kendal Mountain Festival
 - The Lakes International Comic Arts Festival - This festival attracts over 18,000 people into our town
- Kendal Torchlight Carnival - It is estimated that this event brings over £1.5 million into the local economy

- Lakes Alive

THE LAKES INTERNATIONAL COMIC ART FESTIVAL *“WE ARE WEDDED TO KENDAL. IT’S MORE A CASE OF IT EXISTING OR NOT. AFTER ALL WE ONLY ASK FOR 10% SUPPORT TOWARDS OUR ANNUAL BUDGET AND I THINK IF THIS REDUCED, QUITE RIGHTLY, OTHERS MIGHT ASK WHETHER IT’S VIABLE IN KENDAL AND WHERE THE LOCAL BUY-IN IS”*

KENDAL TORCHILIGHT CARNIVAL *“SUPPORT FROM KENDAL BID DOES HELP US TO LEVERAGE ADDITIONAL FUNDING, AND ALSO HELPS TO RAISE THE PROFILE OF THE EVENT. BY PROVIDING THE GRANT, BID GIVES US BACKING AND SHOWS CONFIDENCE IN THE EVENT WHICH ENCOURAGES OTHERS TO SUPPORT IT.”*

LAKES ALIVE *“KENDAL BID MONEY HELPS TO LEVERAGE SIGNIFICANT OTHER FUNDING TO ALLOW THE FESTIVAL TO TAKE PLACE AND IS VITAL TO THE DELIVERY OF THE FESTIVAL. IT ALSO ENSURES THAT WE CONTINUE TO USE THE TOWN AS THE MAIN PART OF THE OFFER. WITHOUT THIS, SOME OF THE COMMISSIONS MAY GO INTO THE WIDER COUNTRYSIDE, HAVING LESS ECONOMIC IMPACT ON THE TOWN CENTRE.”*

- No more lobbying on your behalf to the Councils
- No more BID funded parking concessions
- No more support for the community bus service

WHAT HAPPENS IF I JUST DECIDE NOT TO VOTE?

There is no minimum turnout for a BID. If the BID is passed for a further 5 year term, liable levy payers will have to pay the BID levy regardless of whether they have voted.