# CITY OF NORTH TONAWANDA

# BROWNFIELD OPPORTUNITY AREA

## FINAL

Nomination Study

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# *Section 1: Project Description & Boundary*

## 1.1 LEAD PROJECT SPONSORS

The City of North Tonawanda is the sponsoring municipality of the Tonawanda Island Brownfield Opportunity Area (BOA) Nomination Study, a program funded, administered, and overseen by the New York State Department of State (DOS), with technical support provided by the Department of Environmental Conservation (DEC). The Lumber City Development Corporation (LCDC) is responsible for management of the project on behalf of the City. LCDC has been proactive and involved in a wide range of planning initiatives within the City and specifically within the BOA study area.

The City of North Tonawanda is also undertaking an update to its Local Waterfront Revitalization Plan (LWRP), which shares a considerable area of overlap with the BOA. The LWRP seeks to provide guidance for future development along the City's waterfronts, and promotes best practice and specific policies relating to development within the marine environment. The LWRP process also provides access to implementation funds which can further leverage the overlap with the BOA study area. The LWRP is a State-funded program also administered by DOS, and together these two initiatives will provide the framework for revitalization within the waterfront and downtown portions of the City. These two efforts will build upon momentum and action started in 2006 with the City's Downtown Redevelopment Plan and further supported in 2009 by the City's new Comprehensive Plan.

In an effort to ensure the continued involvement of the community throughout the planning process, the LCDC established a Joint Steering Committee representing a range of local stakeholders and key aspects of the BOA and LWRP projects. Steering Committee members provide a diverse background of interests, including economic development, recreation, water dependent activity, community character, cultural assets, and business interests.

**THREE STEPS OF THE BROWNFIELD OPPORTUNITY AREA PROGRAM:**

***Phase 1: Pre-Nomination***

- Preliminary analysis of the community and potential brownfield sites
- Identification of a study area
- Establishment of partnerships with key stakeholders and initiation of public participation process
- Initial identification and summarization of opportunities for renewal

***Phase 2: Nomination***

- Comprehensive analysis of the study area and individual brownfield sites
- Analysis of economic and market trends to assist in strategy development
- Development of specific recommendations for the revitalization of strategic sites

***Phase 3: Implementation***

- Detailed individual site assessments, as required, to determine remediation strategies and needs
- Creation of a detailed reuse and redevelopment strategy for strategic sites
- Development of a marketing strategy for individual redevelopment sites

# 1.2 INTRODUCTION TO THE BOA PROGRAM

The BOA Program was developed in 2003 as the planning component of the NYS Superfund/Brownfield Law (GML Article 18-C, Section 970-r), providing municipalities and community-based organizations with financial and technical assistance to complete area-wide revitalization strategies for neighborhoods impacted by the presence of brownfields and environmental hazards. At the completion of the program, communities will be designated a BOA, increasing their competitive position for access to funding and incentives under the DEC Brownfield Cleanup Program, the Empire State Development Corporation's economic development programs, and many other State and Federal assistance opportunities.

***A "brownfield" is real property whose expansion, redevelopment or reuse may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant.***

Brownfield sites are typically former industrial or commercial properties where operations may have resulted in environmental impairment. The DOS and DEC recognize the expansive detrimental impacts these sites have on their surrounding neighborhoods, and that brownfield impacts are not limited to individual sites or adjoining property. The marketability and viability of entire neighborhoods are impacted by the presence, or potential presence, of contaminated sites by negatively affecting the psychology of residents and potential investors. The negative psychological effects of brownfields can lead to disinvestment and blight radiating outward far beyond the impacted sites or immediate area. The BOA Program assists communities in identifying and analyzing sources of neighborhood distress, and provides the resources and capacity to develop and implement revitalization strategies. State and federal programs also exist, such as the DEC Environmental Restoration Program, the DEC Brownfield Cleanup Program, and the US Environmental Protection Agency's Brownfield Program. These programs focus on physical investigations and activities, further assisting local municipalities in dealing with brownfield properties and their impacts on communities.

# 1.3 PROJECT DESCRIPTION

## 1.3.1 General Overview

The North Tonawanda BOA is an approximately 546 acre area located along the Niagara River and Erie Canal in the City of North Tonawanda, encompassing all of Tonawanda Island, the Little River and the majority of the City's historic downtown core. As seen in Map 1, the City and BOA are also located at the western gateway to the Erie Canal, and are within




***Map 1**: Regional Context*

short distances to Buffalo, Niagara Falls, and Ontario, Canada. The study area includes a variety of waterfront, industrial, commercial, and retail land uses. In addition, the BOA is home to some of the City's primary cultural and natural resources, most notably 15,000 feet of waterfront along the Niagara River and 3,500 feet of the New York State Erie Canal.

A primary defining element of the BOA is a commercial-industrial zone located on Tonawanda Island. The 89.3 acre island is separated from the mainland by the Little River, an approximately 400 foot wide channel of the Niagara River. A significant amount of development and investment flowed into North Tonawanda, much of it in the vicinity of Tonawanda Island, the Little River waterfront, and downtown between 1870 and 1950. As the regional and national economy shifted, these areas were left with aging infrastructure, obsolete or abandoned buildings, and environmental contamination.

Of the 403 properties within the BOA, 61 were identified as potentially contaminated, covering 18 percent of the study area. In addition to these brownfields, an additional 90 vacant and underutilized parcels were identified as significant to the revitalization of the study area. Together, these 151 parcels represent 70 percent of the BOA and 43 percent of assessed value. Of the non-vacant sites, most are categorized as commercial or industrial, with nearly three-quarters (74 percent) of BOA industrial properties being identified as potentially contaminated or underutilized. More information on Vacant, Underutilized, and Potentially Contaminated Sites within the BOA can be found in the corresponding discussion in Section 2 of the BOA Nomination Study and on Map 7.

### 1.3.2 Redevelopment Potential

The two primary drivers of redevelopment potential within the BOA are the availability of land and the City's abundant waterfront. Vacant and underutilized property within the Study Area accounts for 35 percent of the acreage. Within the Study Area, four locations hold significant promise for large scale redevelopment activities, and these areas align with areas of contiguous underutilized and vacant parcels. These sites include the former International Paper site on Tonawanda Island, the former Tonawanda Iron site along River Road, the Buffalo Bolt Business Park on Oliver Street, and properties near the intersection of Main Street and River Road.

In total, these four areas account for approximately 100 acres, or a little less than 24 percent of the Study Area, yet represent two-thirds of total vacant and underutilized property within the BOA. The redevelopment of these sites will likely have catalytic impacts to the surrounding neighborhoods, spurring reinvestment in existing property, and the redevelopment of the remaining vacant and underutilized sites as infill projects.



*Gateway Harbor Park along the Erie Canal.*

The second driver of redevelopment potential within the BOA is the City's vast waterfront resources. North Tonawanda's nearly four miles of shoreline include the deep-waters of Tonawanda Harbor and the protected inlet of the Little River. These areas represent significant opportunities for water-dependent redevelopment.

In addition to the high redevelopment potential for waterfront property, the City's image and identity as a waterfront community should play a major role in community revitalization efforts. The City currently capitalizes on its Erie Canal waterfront as co-host of the annual Canal Fest of the Tonawandas during July. Similar events take place along the Niagara River, such as the kite flying and boat racing events held out of Gratwick Riverside Park. The community's numerous waterfront parks, including Gratwick, Veteran's, and Gateway Harbor, provide diverse rest and recreational opportunities. The continued investment and programming of these spaces will further the City's identity as a waterfront community and provide destinations for both residents and visitors

To culminate revitalization efforts, the BOA Nomination Study will assist in the development of a rebranding campaign that represents the vision of the community as a principal waterfront recreation destination in the Great Lakes. This effort will serve to attract outside attention from investors, while also improving resident awareness of the special qualities of North Tonawanda.

## 1.3.3 BOA Plan Purpose and Need

The North Tonawanda BOA Plan will identify redevelopment and reinvestment challenges and opportunities, particularly for the approximately 27 catalyst sites and strategic areas within the Study Area. Specific recommendations regarding the potential reuse and revitalization of key properties and areas will include actions to modify land use patterns and zoning regulations, and create policies and programs which bolster the City's economic development capabilities. The BOA Plan will culminate in the development of a Master Plan and Implementation Strategy which will outline proposed actions according to a phased timeline that spans the next 10 or more years.

## 1.3.4 Related Planning Studies and Efforts

The BOA Nomination Study is intended to coalesce previous planning and design efforts undertaken by the City and create a unified implementation strategy for key sites within the community. The following section presents a brief summary of a number of significant applicable planning processes that have been reviewed, considered, and incorporated into the BOA Nomination Study.

***DOWNTOWN WAYFINDING PLAN (2009-2010)***

In 2009, the City began developing a wayfinding strategy for downtown including the area bounded by Oliver Street, the Erie Canal, Thompson Street, and the Niagara River. The strategy includes both traditional elements such as gateway markers, directional signage, and interpretive/informational kiosks, and alternative wayfinding strategies such as symbology embedded into the streetscape and public art. A primary component of revitalization efforts within the BOA and LWRP documents will be to improve wayfinding throughout the downtown and waterfront areas. The City is in the process of finalizing the design character of the wayfinding scheme, with a branding and community identity component to be conducted in concert with the BOA and LWRP processes.



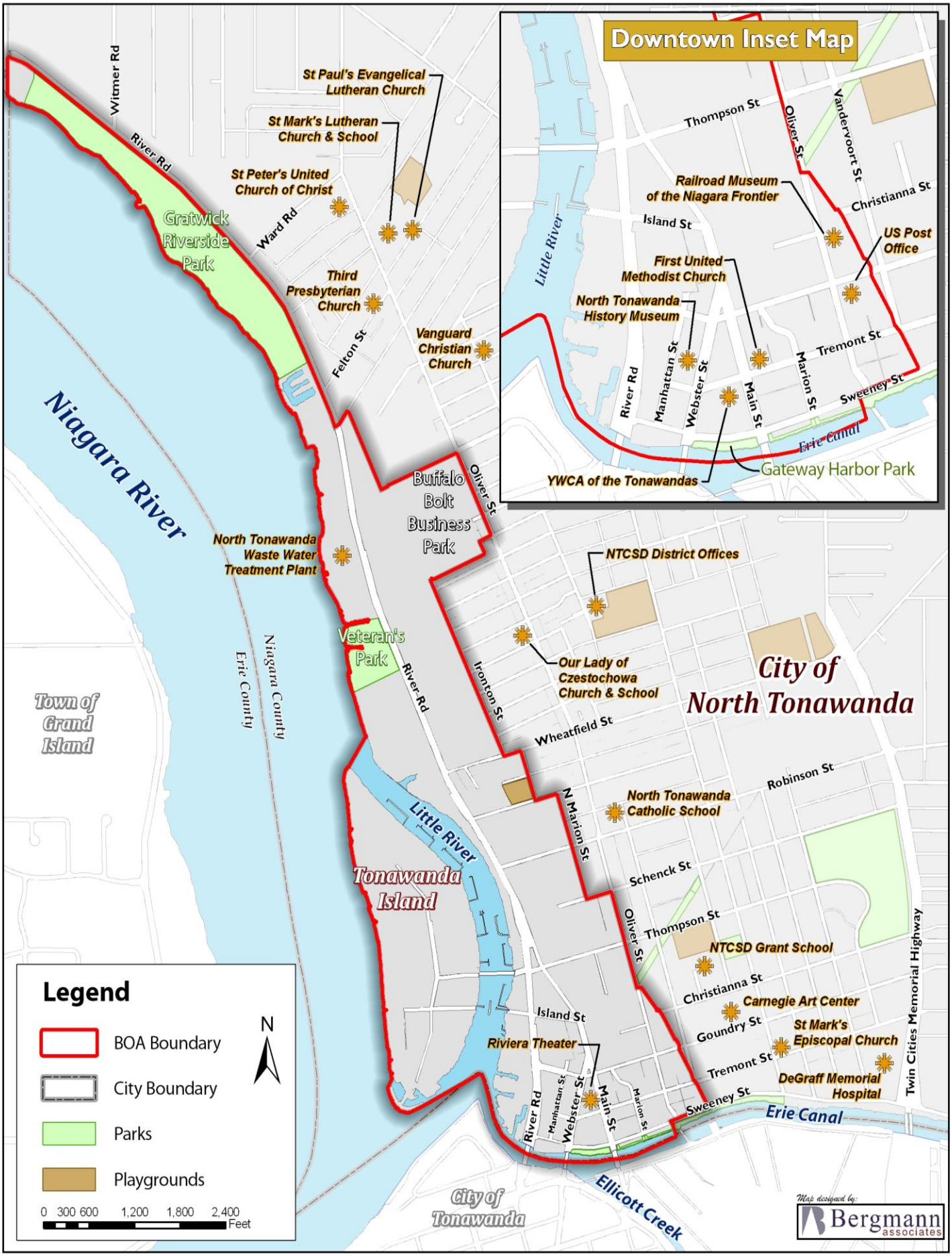

*Downtown Wayfinding Plan Cover.*

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 2**
**Study Area Context**

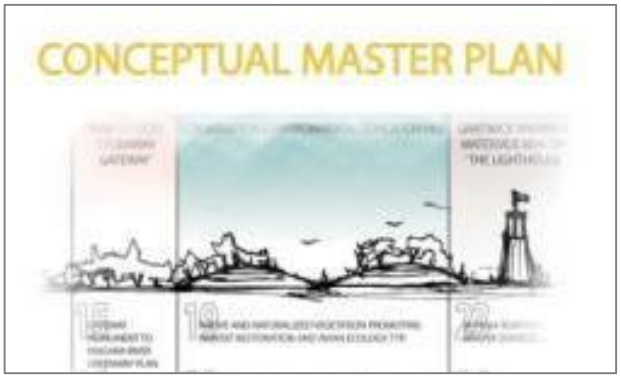


### *GRATWICK RIVERSIDE PARK MASTER PLAN (2008)*

The Master Plan for Gratwick Riverside Park strives to exemplify opportunities that can be realized through adherence to the objectives outlined in the Niagara River Greenway Plan. As a former industrial and landfill site, this park will serve to educate the public about ecological mitigation needed to promote the restoration of critical waterfront brownfields.

Engineering installations will demonstrate the innovative methods utilized to clean Great Lakes waters and soils and restore habitats. Additionally, the park will become a recreation destination for families and visitors to North Tonawanda and the Buffalo-Niagara region.

In 2010, the construction of an accessible fishing pier will commence implementation efforts, with funding from the New York Power Authority (NYPA) Niagara River Greenway committees, which provide funding for the implementation of the Niagara River Greenway Plan discussed below. This master plan is a critical implementation step from the Comprehensive Plan process, provides additional site specific strategies to be adopted within the BOA, and is a model for environmental site remediation.




*Gratwick Park Conceptual Master Plan cover.*

### *COMPREHENSIVE PLAN (2007-2009)*

The 2009 Comprehensive Plan for the City of North Tonawanda builds upon the 2006 Downtown Redevelopment Plan and provides an overall framework for future public and private investment and decision making throughout the City. The Plan seeks to organize and coordinate the collective investment by residents, businesses, colleges, churches, schools, volunteer organizations, and local government to shape the physical, social, and economic character of the community.

The Plan included specific policies regarding waterfront and economic development that provide detailed objectives and action items to be reviewed and incorporated into the BOA planning process. The Plan articulates an overall vision for the city which is to be utilized as a guide during the implementation of recommended actions.
Accomplishments since the plan was adopted include the initiation of both the BOA and LWRP projects, which were identified as important follow-on planning efforts for the community.




*Primary community gateways identified in the Comprehensive Plan.*

### *REVISIONING BROWNFIELDS REGIONAL STRATEGIC APPROACH (2007)*

In 2000, the Niagara Region Brownfields Coalition was formed to collaboratively work towards revitalization of contaminated land within the Niagara Region and along its waterfronts through partnerships with local governments, business owners, and educational institutions. The Revisioning Plan outlines a regional approach to the redevelopment of some of region's most challenging yet promising properties.

Within North Tonawanda, properties on Tonawanda Island were included for advanced consideration, including project visioning, the creation of concept site plans, and the development of a sample investment pro-forma to understand financial limitations associated with redevelopment. The plans for Tonawanda Island include a large public park at the northern tip of the island, which connects to a pedestrian plaza at the land of the Durkee Bridge with a waterfront promenade. Land uses include mixed-use commercial/retail, residential, and community buildings.

The recommendations for approximately $270 million in investment include a series of implementation steps the City can take to accommodate for private development. The BOA Program will help facilitate these implementation steps through continued market research, environmental investigations, and the establishment of a design/brand identity.

### *NIAGARA RIVER GREENWAY PLAN (2007)*

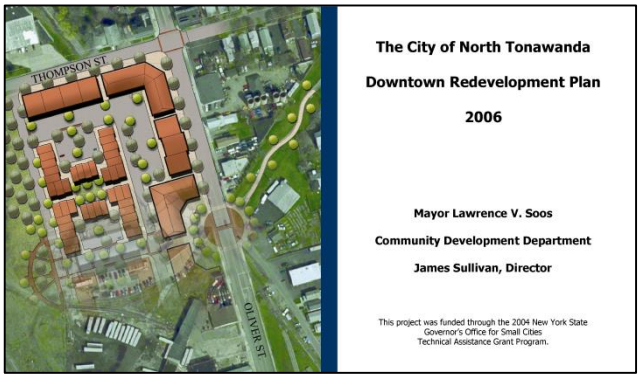
The Niagara River Greenway Plan establishes a unified vision and a set of principles for the Niagara River Greenway. The BOA is entirely contained within the Greenway boundary, and acts as a local refinement plan to assist in the implementation of the Greenway. The Greenway Plan discusses several high priority "Implementation Concepts" which describe system-wide approaches and strategies for Greenway development. Among these concepts is the redevelopment of Gratwick Riverside Park within the BOA as a family-oriented tourism destination. Gratwick Riverside Park is a model for environmental remediation in North Tonawanda, and is a critical component of the City's public space system. The implementation of BOA recommendations along the waterfront will require close coordination with the Niagara River Greenway Commission, which has access to significant funding levels as part of the New York Power Authority (NYPA) relicensing agreements for hydropower at Niagara Falls.

### *DOWNTOWN REDEVELOPMENT PLAN (2006)*

The North Tonawanda Downtown Redevelopment Plan focuses on defining a realistic vision for revitalization of the downtown and lower Oliver Street corridor areas of the City. The Plan's recommendations are based upon existing conditions within the study area, market data, input from local and visitor populations and community involvement.

The three key redevelopment opportunities presented within the Plan, (Downtown, Oliver/Thompson Street, and River Road/Main Street) are located within the BOA study area. The Plan provides the desired traits and elements for the redevelopment of these locations and the general revitalization of the study area. The recommendations made for these redevelopment areas will be promoted within the BOA Nomination Study, and included within the study area's implementation strategy.

Successful implementation efforts resulting from the Plan include the City's NYS Main Street program, which has leveraged more than $2 million in State funding for streetscape and façade improvements in the downtown core, which is included within the BOA boundary.

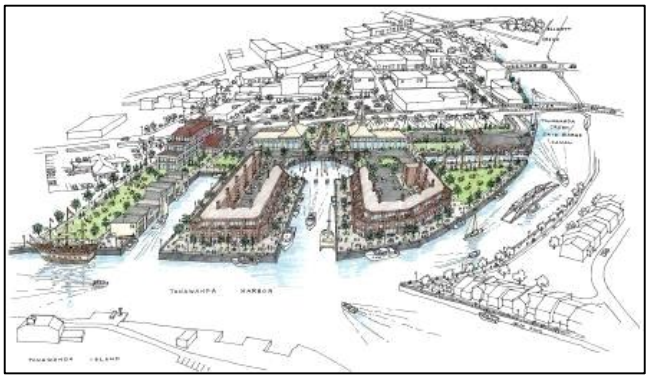



*Downtown Redevelopment Plan cover.*

### *GATEWAY POINT FEASIBILITY STUDY (2002)*

In 2002, the City of North Tonawanda produced a redevelopment plan for the Weatherbest Slip and Wardell's Boatyard area. This plan seeks to build upon the momentum and success of the Gateway Harbor redevelopment that took place in 1999. The Gateway Point Feasibility Study explored the viability of the City acquiring and redeveloping private-property for public purposes, including the establishment of historical interpretive facilities, recreational facilities, and public access. In addition, the City sought to create a concept for recreation, retail, residential, restaurants, small-scale children's attractions, a visitor center and a heritage museum.

The redevelopment of the Gateway Point site is considered to be a high priority action item within the BOA study area. This plan provides guidance and in-depth information regarding site constraints, limitations, and public opinion surrounding this highly controversial area of the BOA. Redevelopment and reinvestment within this area is encouraged to promote and enhance the City's primary water gateway.



*Preferred alternative rendering for Gateway Point.*

### *LOCAL WATERFRONT REVITALIZATION PROGRAM (1988)*

North Tonawanda's original LWRP produced in 1988 analyzed the City's waterfront resources broken down into five subareas. Land use recommendations and priority capital projects within each subarea were developed that would enhance the quality of life for residents, protect the fragile waterfront environment and habitats, and spur economic development activity and community growth. An update to the LWRP is being developed concurrently with the BOA Nomination Study to leverage funding resources and coordinate recommendations and proposed investments in the nearly identical project boundaries.

A number of projects proposed in the LWRP have been implemented, including the construction of docks along Sweeney Street and the remediation and reuse of Gratwick Riverside Park.

# 1.4 COMMUNITY VISION AND PRINCIPLES

## 1.4.1 Supporting the City's Vision

Over the last five years, the City of North Tonawanda has completed several community planning and design initiatives that directly relate to revitalization and redevelopment efforts within the BOA study area. In 2009 the City adopted a Comprehensive Plan resulting in the development of a vision statement. This vision statement is the foundation for current BOA efforts. Some of the overarching principles of the Comprehensive Plan vision include:

- Identify sustainable use and redevelopment of the City's abundant waterfront resources;
- Undertake progressive planning in order to inform intelligent growth and revitalization of the City as a destination for families and visitors;
- Provide a safe, walkable, and accessible community; and
- Strive to retain and complement the small-city character and distinct culture of North Tonawanda.

## 1.4.2 A Vision for the BOA in 2020 and Beyond

The community has also identified a vision specific to the BOA that identifies how they would like to see the study area enhanced and improved in the future. The vision statement captures and embraces the elements of the BOA that the City holds dear, while recognizing that changes are necessary to realize the future potential of this area.

In 2020 and beyond, the North Tonawanda BOA will be described as:

***…a vibrant mixed use district centered around the confluence of two waterfronts – the Erie Canal and the Niagara River. Residents can choose to live, work, or relax while taking advantage of abundant commercial opportunities, employment options, restaurants, and recreation assets, all of which capitalize on the natural beauty of the surrounding landscape. Visitors come not only to enjoy the waterways, but to experience the multitude of land side cultural and recreational amenities offered at this "Gateway to the Erie Canal."***

## 1.4.3 BOA Principles and Strategic Objectives

A series of ten guiding principles that build upon the vision statement were prepared to help guide decisions and future investments. Each of the principles is supported by strategic objectives drawn from input generated by the public, steering committee, project stakeholders, and City staff. Each objective will be addressed through the BOA planning and design process, with recommendations defined in subsequent phases of the process.

The foundation of the NYS BOA Program is – *"to assist communities in fostering redevelopment and return dormant lands into productive and catalytic areas while restoring environmental quality."* Each BOA principle supports this core concept.

***PRINCIPLE #1:***

**MAKE THE WATERFRONT A DESTINATION**

Waterfronts are natural destinations, offering scenic views and recreation opportunities. They serve as a centerpiece and attraction for many types of development. Regardless of the season, people enjoy being near the water. However, people need a place to go on the waterfront, places that are welcoming, attractive and offer a way to spend time. Though the BOA benefits from frontage on two waterfronts, upland areas are not developed to their full potential. The City must continue to move forward with efforts to promote economic development along the Erie Canal, River Road and Tonawanda Island.

***Strategic objectives:***

- Identify a land use plan for Tonawanda Island that encourages public use and enjoyment of the Little River and Niagara River frontages.
- Continue to foster investment in and around Gateway Harbor and the adjacent downtown area.
- Identify programming and businesses for the waterfront that provide a reason for both residents and visitors, to spend time and money.
- Identify sites along River Road that could be redeveloped to support the City as a waterfront destination.
- Continue to implement enhancements and identify programming for Gratwick Riverside Park as a regional recreational and open space attraction.
- Implement design guidelines for new waterfront development that accommodate public access and ensure a high quality public realm.

***PRINCIPLE #2:***

**OFFER A DYNAMIC URBAN EXPERIENCE**

After many decades of development trends pulling families and businesses into suburban locations, the desire to be back "downtown" is re-emerging. People long to be close to goods, services and to live in a dynamic setting that offers a range of activities. The City of North Tonawanda is well situated to capitalize on this trend. The downtown core has retained a strong building stock, street grid and retains strong connections to both the Erie Canal and the Niagara River. The City must set forth a design philosophy that instills a sense of pride in the community and translates to high quality streetscapes, public spaces, and new development projects.

***Strategic objectives:***

- Attract small, niche businesses to the downtown providing a range of retail establishments that appeal to both residents and visitors.
- Support mixed uses in the downtown and waterfront areas in an effort to create a 24-hour downtown where people live, work, and play.
- Provide visitors with a range of dining options.
- Recognize boaters as an important segment of the downtown population during the summer months and consider strategies to draw them from the waterfront to downtown.
- Increase the frequency and quality of pedestrian and streetscape amenities, including signage.
- Implement façade design guidelines to ensure infill development enhances existing building character and retains the historic integrity.
- Treat gateways, roadways, and individual sites as "welcome" features to the community. Ensure their treatment is portraying how the BOA wants to be recognized.

***PRINCIPLE #3:***

**PROMOTE DIVERSITY IN LAND USE**

The BOA will be most successful when it embraces the diversity of its land base. The BOA study area has historically been home to a varied range of land uses, including industrial, commercial and residential. This diversity is actually quite desirable and design strategies and guidelines can help overcome potential land use conflicts. The real benefit of having a variety of land uses is associated with creating a 24-hour city that supports the local tax base, provides jobs to residents, welcomes and responds to visitors needs, fosters small business development and provides options for residential living.

***Strategic objectives:***

- Promote a range of land uses that support the long-term economic goals of the community.
- Support the build-out of the Buffalo Bolt Business Park for industrial and large-scale business development.
- Investigate the potential for a variety of land uses on Tonawanda Island that maintains existing businesses and capitalizes on the strategic location of the Island for water-enhanced uses, including residential, commercial, open space, and tourist facilities.
- Consider the most appropriate land uses for River Road, recognizing the land use patterns already in place. Identify land uses that support the vision of the city, including increased public access.
- Continue to foster small business, office, and mixed use development in the downtown core.
- Support the development of a concentration of water-based uses along the Little River to create a true waterfront district.

***PRINCIPLE #4:***

**IDENTIFY NEW USES FOR INFRASTRUCTURE**

The City's industrial heritage has significantly shaped infrastructure investments in utilities and transportation corridors. Today, much of the infrastructure in the BOA is oversized and underutilized. Accepting this infrastructure as an existing condition and identifying ways to better utilize infrastructure is be a priority for the City. The existing infrastructure should be viewed as an opportunity, not a hindrance for redevelopment.

***Strategic objectives:***

- Work with railroads to identify opportunities for rail enhancements, particularly at crossings and overpasses.
- Work with railroads to determine the feasibility of converting abandoned and unused railroad lands to public amenities, such as parks or trail corridors.
- Market the existing surplus of water and sewer capacity as a strategic advantage to attract new businesses and development.
- Implement streetscape enhancements along River Road that maintain traffic flow and volumes while reducing the negative blight and visual impacts associated with the corridor.
- Ensure that traffic signals throughout the BOA, and in adjacent neighborhoods, are not impeding the flow of traffic.

***PRINCIPLE #5:***

**CELEBRATE OUR HISTORY AND CULTURE**

The City's land use and development pattern are closely tied to its industrial and manufacturing based history. History and culture remain an important part of the community today whether considering the existing building stock, ties to the carousel, the farmers market, or the Erie Canal. However, acknowledging these ties is not enough if the City wants to stand out from other communities. North Tonawanda needs to celebrate its history and the cultural resources it offers to ensure that those assets that are "uniquely" ours are shared with others.

***Strategic objectives:***

- Create an interpretive program that is consistent throughout the BOA.
- Implement recommendations from the Wayfinding Plan to direct people to historic and cultural sites and destinations.
- Identify programming that focuses on various historically and culturally significant events within the city.
- Promote historic and cultural resources in marketing materials.
- Incorporate public art into the streetscape and in public gathering areas.

***PRINCIPLE #6***

**DESIGN FOR PEOPLE, NOT JUST CARS**

Today, much of the land area of the BOA can be described as being designed for the automobile. Apart from the downtown core with sidewalks and public gathering areas at Gateway Harbor, there are few areas in the BOA that are safe or attractive to pedestrians. This is particularly true on Tonawanda Island. Recognizing the value of facilitating pedestrian circulation, the City must consider pedestrian access to the same extent that it considers movement of cars and trucks. A provision associated with creating successful urban and waterfront environments is the creation of high quality access and experiences within the public realm.

***Strategic objectives:***

- Install sidewalks, bike lanes, or trails along the River Road corridor so pedestrians feel safe and welcome.
- Increase accessibility along and to the waterfront, particularly along the River Road corridor.
- Create strong connections, visually and physically, between the downtown, the Erie Canal and the Niagara River.
- Provide a contiguous network of trails and open spaces throughout the BOA.
- Design urban spaces such as walkways, streetscapes, and plazas with elements that engage residents and tourists.
- Ensure new development is designed to create a welcoming street presence that engages pedestrians with reduced front setbacks, transparent windows and a sidewalk presence.

***PRINCIPLE #7:***

**ADVANCE ENVIRONMENTAL CLEAN-UP**

The negative perceptions often associated with the BOA study area are directly tied to the notion that many of the sites are contaminated, blighted and underutilized. The overarching purpose of the study is to further the clean-up of these sites to better position them for future redevelopment and enhancement. Remediation and enhancement of key sites will improve overall community health, increase property values, foster economic development opportunities, and instill a sense of pride.

***Strategic objectives:***

- Identify sites eligible for Site Assessment funding and pursue funding from the NYS Department of State.
- Work with NYS Department of Environmental Conservation (DEC) to identify environmentally sensitive sites and options for moving forward.
- Engage property owners in an effort to remediate and improve their sites.
- Identify strategic sites based on environmental and community planning criteria. Identify redevelopment scenarios for the sites based on current physical and market conditions.

***PRINCIPLE #8:***

**WORK COLLECTIVELY AND COOPERATIVELY**

The long-term success of the BOA will not be realized by the efforts of one person or one organization alone. Coordination amongst public and private entities must guide the implementation of BOA recommendations. The City will spearhead the creation of broad partnerships and collaborative agreements to bring a wide range of parties together, including state agencies, regional organizations, local property owners, local business owners, prospective investors and residents.

***Strategic objectives:***

- Encourage local leadership to support investment in the BOA, particularly to the development of a stronger tourism industry.
- Engage local residents in implementation activities and local revitalization efforts.
- Organize working groups and committees around specific implementation projects or tasks associated with the BOA.

***PRINCIPLE #9:***

**IDENTIFY PROJECTS THAT BUILD MOMENTUM**

The revitalization and redevelopment of the BOA study area will not happen overnight. The process will be long and will require the close coordination of public and private stakeholders. Small projects can and should be completed quickly to show progress towards the next set of goals and maintain momentum in the quest to redevelop the BOA and City of North Tonawanda.

***Strategic objectives:***

- Identify a multi-phased land use and project plan that shows potential progress in the BOA in 2, 5, 10, and 20-year periods.
- Create a detailed implementation strategy that identifies short- and long-term projects.
- Identify early wins to build momentum.
- Coordinate efforts with local stakeholders and interested parties to begin implementation efforts immediately.
- Consider the long-term impacts of decision-making to avoid temporary short-term solutions.
- Report progress to the general public through updates to the project website that can be modified over time to reflect progression of the project from planning level to implementation.
- Coordinate with local media outlets to attract regular coverage about progress and advancement being made within the BOA.

***PRINCIPLE #10:***

**DEFINE AND MARKET A UNIQUE IDENTITY**

The identity and brand developed for the BOA and the City must address strongly-held community values, while also projecting a vision of the future. Once a brand is identified, marketing the BOA must be multi-faceted, targeting potential new businesses and developments through available monetary incentives. It must appeal to business executives who are considering expansion and what a community can offer to employees, such as good schools and recreation options. Marketing must target boaters who travel the Niagara River and Erie Canal and are looking for a reason to stop and dock in North Tonawanda. Marketing must be directed to small business owners and regional residents that may visit the city by land for a day trip. Identifying strategies for overcoming the negative perceptions associated with study area, both locally and from afar, will be central to the marketing strategy.

***Strategic objectives:***

- Identify a specific "brand" for the study area that can be integrated into future marketing efforts and projects the community's vision.
- Explore special events that promote the history, culture and heritage of the City and study area.
- Foster collaborations among local businesses and stakeholders to collectively market the study area.
- Work with regional tourism organizations to ensure destinations and events are highlighted in regional marketing materials.

# 1.5 BOA BOUNDARY DESCRIPTION AND JUSTIFICATION

## 1.5.1 Summary Description

The North Tonawanda BOA is bounded on the south by the Erie Canal, on the west by the Niagara River, on the north by the City boundary, and on the east by River Road, Oliver Street, Ironton Street, and North Marion Street. The primary organizing features of the study area include the Niagara River, the Erie Canal and River Road. These elements define the project's study districts and establish a framework of interconnected commercial zones and recreational opportunities.

As shown in Map 3, the BOA is centered on Tonawanda Island, an industrial/commercial area that is separated from downtown North Tonawanda by the Little River. Tonawanda Island and the adjacent Little River waterfront are at the core of the City's industrial, manufacturing, and logistical success. This area is the former or current home of International Paper, Tonawanda Iron, and International Fiber, and continues to be a significant employment center in North Tonawanda.

The logistical benefits of being located at the confluence of the Erie Canal and Niagara River, and adjacent to inexpensive power from Niagara Falls, created a spill-over of additional development along the River Road corridor, with industrial giants such as the Buffalo Bolt Company carving out significant areas of land for operations. Lands further north along the Niagara River were utilized for the dumping of industrial and municipal waste generated by the significant amount of industrial activity taking place in adjacent portions of the city.

Taken together, the BOA represents 546 acres of historic and current land uses mobilized for the processing, manufacturing, assembly, distribution and sales of goods and materials. This activity has been integral to the economic sustainability of the community, but has also left areas contaminated by chemicals and littered with underutilized or abandoned infrastructure.

Adjacent to these industrial areas are North Tonawanda's historic downtown and waterfronts, which will be at the center of the City's revitalization efforts. Capitalizing on the potential for recreation and tourism investment will allow the City to balance its inherent assets with its industrial past.

River Road and the adjacent waterfronts have long been the spine of activity on the west side of North Tonawanda, helping define the Brownfield Opportunity Area boundaries, and justifying the inclusion of these and adjacent lands in the planning and revitalization process.

## 1.5.2 Boundary Justification

***NORTHERN BOUNDARY***

The northern boundary of the BOA includes Gratwick Riverside Park and extends to the municipal boundary with the Town of Wheatfield. As an existing brownfield previously remediated under the DEC's Voluntary Cleanup Program, Gratwick Riverside Park is a logical inclusion within the BOA. The extension of the BOA, to include an adjacent parcel to the north, places the entire Niagara River waterfront within the boundary and provides a strong opportunity to tie waterfront redevelopment policies from the BOA with the concurrent LWRP planning project.

***SOUTHERN BOUNDARY***

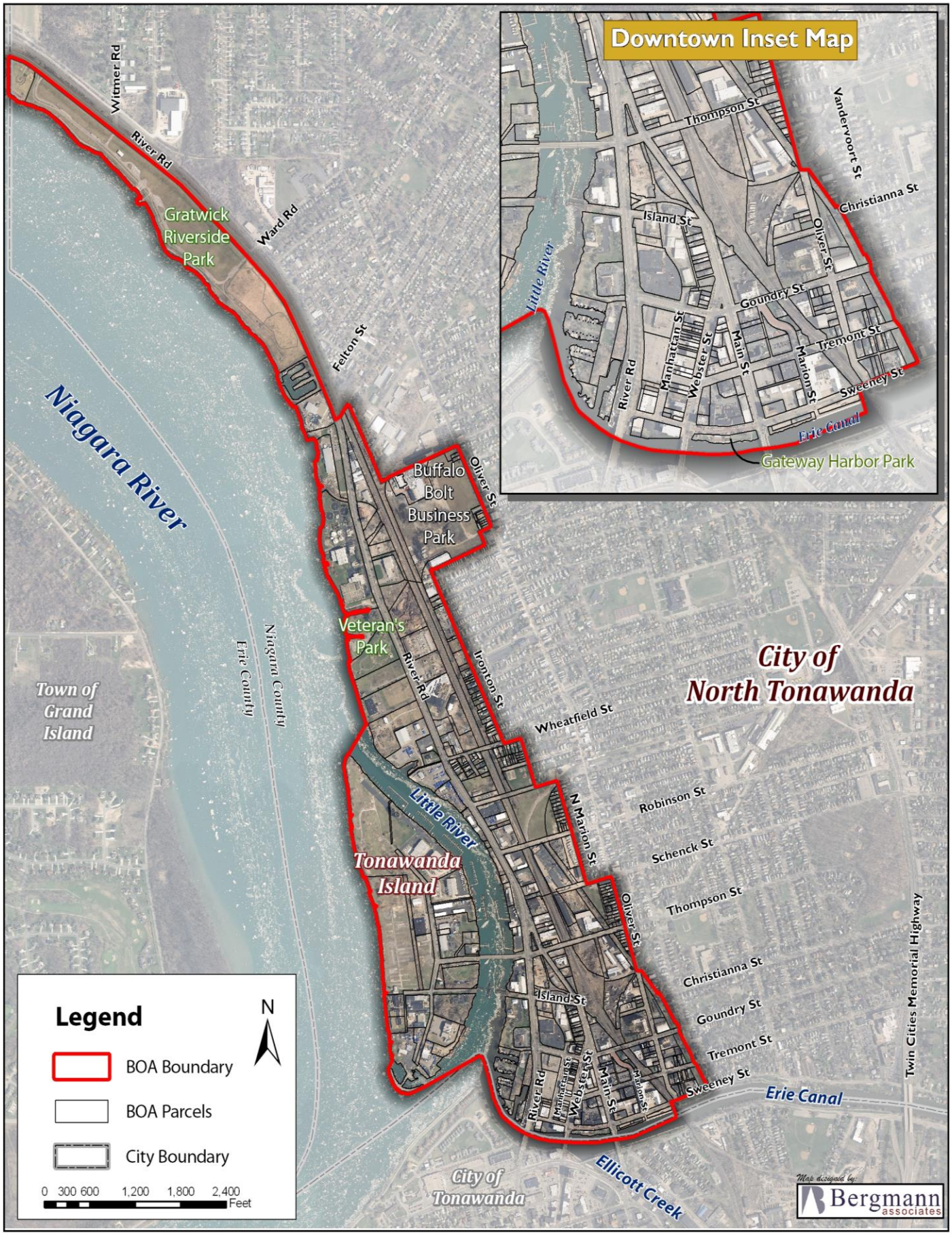
The Erie Canal and Tonawanda Creek are the southern municipal boundary for the City, and are the most logical terminus of the study area. These

# North Tonawanda Brownfield Opportunity Area

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*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 3**
**BOA Boundary**



waterfronts were historically utilized for commercial and industrial activities, and thus, are appropriate areas for inclusion within the BOA boundary.

### *WESTERN BOUNDARY*

The Niagara River is North Tonawanda's western municipal boundary, and has historically been utilized for commercial, recreational, and industrial activities. The Niagara Riverfront contains several of the city's primary sites of environmental concern, including sites located on Tonawanda Island. These areas form the backbone of known and potential brownfield sites within the study area, and represent the impetus behind the BOA project.

### *EASTERN BOUNDARY*

Historically, nearly all of the industrial activity on the west side of the city took place within a narrow corridor defined by railroads and major thoroughfares. The eastern boundary of the BOA begins at the southern extent of the former railroad corridor that crossed Sweeney Street at Vandervoort Street. As this former rail line travels northwest, abutting industrial and commercial properties have been included within the BOA boundary to logical terminal points with city streets. The areas west of this boundary line continue to be utilized for commercial and industrial activities, and form the interface with the adjacent residential areas along Oliver Street.

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# *Section 2: Community Involvement Plan*

## 2.1 COMMUNITY INVOLVEMENT PLAN

Community engagement and buy-in is imperative to the long-term successful implementation of the BOA Plan. Community members, landowners, stakeholders, officials, and regional organizations must have a vested interest in the success of the plan, and, most importantly, must become partners in its implementation.

At the onset of the planning process, a Community Involvement Plan was created that outlined the methods and techniques used to engage the community throughout the course of the BOA Nomination Study's development. Similar to previous planning and design efforts undertaken by the City, a range of in-person opportunities for public involvement were identified, ranging from general informational public meetings to small group working sessions. In addition, regular electronic and internet communications afforded all interested persons the opportunity to offer their perspectives.

The Community Involvement Plan included the following methods for engaging the community, as seen in Appendix A:

- Bi-monthly steering committee meetings
- Project website
- Public meetings (2)
- Public workshop (1)
- Stakeholder meetings (4)

## 2.2 ENLISTING PARTNERS

### 2.2.1 Project Oversight

The City of North Tonawanda is being represented throughout the BOA process by the Lumber City Development Corporation (LCDC). The Lumber City Development Corporation is a not-for-profit corporation charged with facilitating and implementing economic development activities within North Tonawanda, including the administration of state and federal grant appropriations. The LCDC will be responsible for many of the identified local implementation efforts.

### 2.2.2 Consultation Methods and Techniques

Community participation throughout the project was solicited through multiple meetings both open to the public and by invitation. Funding for this project lead to the formation of a Steering Committee, which is responsible for the joint administration of the BOA project and the update to the City's Local Waterfront Revitalization Program. These two projects shared a Steering Committee to take advantage of inherent savings in time and resources, while leveraging the knowledge and applicability of public input to both plans. In addition to regularly scheduled Steering Committee meetings, a series of Public Meetings provided opportunities for broad community input, while several Stakeholder Meetings permitted focused discussion on important issues facing the community

***STEERING COMMITTEE***

Steering Committee members were invited to participate by the LCDC and City staff. This 17-member committee includes: at large members from

the general public; representatives of the City Waterfront Commission, the City Environmental Commission, City staff, Chamber of Commerce, Niagara County; and staff members from state agencies that would provide advisory and material support to plan development and implementation. A complete listing of Steering Committee membership can be found in Appendix A.

Bi-monthly Steering Committee meetings were held at a regularly scheduled time to present information and gather feedback and input regarding project direction and visioning.

### *PUBLIC MEETINGS AND WORKSHOPS*

A number of public meetings were held over the course of the planning process to share information with the general public and solicit comments and feedback.

The first Public Meeting was held at the North Tonawanda Public Library on September 17, 2009. The purpose of this meeting was to introduce the project to the public and gather feedback from the community regarding their vision for the future of the BOA study area. A series of issues and opportunities were identified by attendees and considered in the planning process. A copy of the presentation from this meeting can be found in Appendix A of this Study.

The second Public Meeting was held at the Carnegie Art Center on Goundry Street on May 20, 2010. The purpose of this meeting was to provide a brief overview of the project, while gathering valuable feedback on a draft listing of sites identified as strategic or catalytic during revitalization. The attendees were provided with the potential phasing of redevelopment and investment projects, and were asked to comment and provide suggestions and relevant information. A copy of the presentation from this meeting can be found in Appendix A of this Study.

The third public meeting was held as a Public Workshop at the Carnegie Art Center on Goundry Street on October 21, 2010. The meeting provided the public a brief overview of the project status, yet focused on the development of detailed design ideas and concepts for sites throughout the BOA. Three separate focus group discussions were held regarding future development opportunities within the BOA and LWRP study areas, concentrating on physical improvement opportunities. Participants were provided the opportunity to sit with consultant staff facilitators and draw their ideas on paper and maps. The information provided at this meeting was reviewed afterwards with consultant staff and included into draft master plan recommendations. A copy of the presentation from this meeting can be found in Appendix A of this Study.

### *STAKEHOLDER MEETINGS*

A series of Stakeholder Meetings were held on January 20, 2010 to further assist the Steering Committee and consultants in the analysis and preparation of the BOA Plan. These meetings were organized around the stakeholder topic areas determined to be most relevant by the Steering Committee and City. Stakeholder topic areas included:

- Developers and investors
- Large businesses and large landholders
- Small businesses
- Parks and recreation users
- Water dependent businesses
- Regulatory agencies

Each meeting was facilitated by consultant staff. Summaries of each meeting are in Appendix A.

# *Section 3: Analysis of the BOA*

## 3.1 COMMUNITY SETTING

### 3.1.1 Historical Perspective

The City of North Tonawanda is a traditional small city located on the eastern banks of the Niagara River at the present day western terminus of the Erie Canal. The City of Buffalo lies approximately ten miles to the south, and residents can access the Canadian border 14 miles to the north in approximately 30 minutes. North Tonawanda is home to over 31,000 people covering 15 square miles, and is rich in natural, cultural and historic resources.

North Tonawanda has a storied history as a regional hub for manufacturing, industry and shipping/logistics throughout the 19th and early 20th centuries. The connection of the Erie Canal with Tonawanda Creek and the Niagara River in 1825 spurred a tremendous amount of growth, allowing the then combined City of Tonawanda to become an important shipping and logistics location within North America between the Upper Great Lakes and the Hudson River. The study area was crisscrossed with numerous railroads, and industrial buildings and docks dotted the landscape throughout the BOA. In 1897, the City of North Tonawanda split off from Tonawanda, and began to forge its own unique identity within the region as the "Lumber City," with its shores along the Niagara River a prime node in the shipment of lumber from Michigan and Canada to east coast markets.

At the turn of the 19th century, Niagara County began its rise as a focal point for industrial chemicals and other manufacturing processes that required significant amounts of electricity, which was provided at low-cost by hydroelectric power on the Niagara River. This permitted North Tonawanda to become an industrial powerhouse and created significant wealth within the community. Parallel to the rise of industrial activity was the decline of the lumber industry resulting from changes in the utilization of the Erie Canal. Commercial usage of the canal virtually ceased in 1959 due to the completion of the St. Lawrence Seaway System. Yet, the city's location remained an asset as manufacturing and chemical industries continued to utilize its excellent rail and roadway transport systems.



*Downtown North Tonawanda circa 1927.*

Beginning in the 1970's, North Tonawanda's economy began to feel the effects of global competition, leading to the slow decline of industry and manufacturing operations. These lost industries and residents left North Tonawanda to deal with issues associated with infrastructure, housing and environmental contamination. In particular, North Tonawanda's waterfront was left underutilized with significant amounts of aging railroad and industrial infrastructure, along with areas of intense contamination.

For more than a decade, the City has embarked on a sustained effort to retire aging and obsolete infrastructure and clean-up contaminated sites. One of the largest efforts to date is the remediation of the former landfill and industrial disposal site that is now Gratwick Riverside Park, located at the northern end of the Tonawanda Island BOA. The 53 acre site was remediated from 1999 to 2001, and has been identified as a gateway for tourism and recreation by the Niagara River Greenway Commission.

One of the most significant opportunities for redevelopment within the BOA is Tonawanda Island, an 89 acre islet prized for its nearly two miles of shoreline. The Little River, which flows between the island and the mainland, affords docks and marinas considerable protection from the Niagara River, and provides convenient access to both the Niagara River and the Erie Canal.



*Aerial view of downtown North Tonawanda and Tonawanda Island as they exist today.*

North Tonawanda has significant assets upon which it can build a strong and prosperous future. The city's location along the Erie Canal and Niagara River remains its greatest economic engine, with vessels located in North Tonawanda having access to the Great Lakes and the Hudson River. A primary goal of the BOA will be to promote North Tonawanda as a waterfront destination within New York State and the bi-national Niagara River corridor.

***North Tonawanda has significant assets upon which it can build a strong and prosperous future, with the City's location along two major waterways - the Erie Canal and Niagara River - its greatest economic engine.***

### 3.1.2 Population

The Census Bureau estimates the 2008 population for the City of North Tonawanda is 31,222, down 6.1 percent from 2000 (33,262) and down 12 percent from 1990 (34,989). The population of Niagara County has also been declining since its peak in 1960; slipping 2.4 percent to its 2008 level of 214,464. Yet, current population estimates for Niagara County show that population decline since 2000 has begun to level off. The Census Bureau estimates for 2008 were slightly higher than 2007, potentially indicating that the rate of loss has eased.

This is supported by the most current projection figures supplied by Cornell University's Institute for Social and Economic Research. In 2002, the Institute projected a population decline of 12.6 percent by 2030; yet, 2005 projections ease this decline to 11.9 percent. This is a trend that should be monitored closely during the 2010 Census, which will provide accurate counts for the BOA, City and County.

The BOA study area has historically been a center of industry and employment, and not a well defined residential neighborhood. While the BOA comprises 7.9 percent of the City by area, the majority of the

***Table 1: Population by Age Cohort, 2000***

| *Age Group* | *City* | *% City* | *BOA* | *% City* |
|---|---|---|---|---|
| **Total 2000** | **32,524** | ***100*** | **782** | ***100*** |
| **Under 5** | 1,882 | *5.7* | 36 | *4.6* |
| **5-17** | 6,055 | *18.1* | 75 | *9.9* |
| **18-21** | 1,749 | *5.3* | 43 | *5.5* |
| **22-29** | 2,993 | *9.0* | 105 | *13.4* |
| **30-39** | 4,846 | *14.6* | 106 | *13.4* |
| **40-49** | 5,511 | *16.6* | 112 | *14.3* |
| **50-64** | 5,058 | *15.2* | 112 | *14.3* |
| **65 & over** | 5,193 | *15.6* | 193 | *24.6* |

*Source: US Census 2000.*

study area consists of commercial and industrial land uses. This explains the low population levels accounted for in Census 2000 data, which indicates a population within the BOA of only 782 persons, or 2.4 percent of the city. The BOA population is split nearly even amongst males and females (49.5 percent and 50.5 percent, respectively), and is 95 percent white in racial makeup. Table 1 compares the BOA to the city by age cohort for the year 2000.

***A majority of North Tonawanda's housing stock was built before 1970, and 30 percent before 1939. Older homes often have great architectural character, yet are costly to maintain and require a significant commitment of time and resources.***

The limited number of residents within the BOA and the age of the data make it difficult to draw meaningful conclusions; however, there are a few noteworthy discrepancies. The percentage of the population aged 65 and over is significantly higher compared to the city as a whole. Seniors typically require more costly services, including health care and transportation. However, the location of these residents near the city core should alleviate some of the difficulties in providing these services. The percentage of children ages 5-17 is approximately half what would be expected if the city were a homogenous entity.

However, when looking at the housing data, the large number of rentals and multi-family buildings within the BOA provides some support for abnormally low numbers of families with children. Generally, low numbers of school age children indicate a smaller proportion of families, which can impact household spending and school population levels, among other areas. However, the small proportion of the city's population present within the BOA is not a particularly strong indicator for the larger community.



*North Tonawanda has significant historic housing assets, such as the Victorian seen above.*

### 3.1.3 Housing Characteristics

The City of North Tonawanda had 14,425 housing units in 2000. The Census Bureau reports that 209 housing units were constructed between 2000 and 2008, an increase of 1.4 percent. The number of demolitions during this period is unknown, making it difficult to determine current housing units within the

city or the study area. The study area's 543 housing units, as of 2000, represent only 3.8 percent of total city housing units. Approximately 46 percent of these units are single-family detached homes, while the remaining units are multi-family homes and apartments.

A comparison of housing units to population allows one to make general assumptions about the density of housing for a given area. The lower the ratio of persons to housing units equates to a greater availability of housing on a per-person basis. In 2000, the city had 2.31 persons per housing unit (PHU), compared to 2.39 PHU for the County, 2.47 PHU for New York State and 2.42 PHU for the Nation. The BOA has a PHU of 1.44, indicating a general abundance of housing units, yet this statistic does not measure their overall quality or condition. Of the 543 units, 8 percent (43 units) are vacant, and 78 percent are rental. The 8 percent vacancy rate amongst BOA parcels is higher than that for the city as a whole (5.2 percent).

A majority of North Tonawanda's housing stock (77 percent) was built prior to 1970, with 30 percent being constructed before 1939. The median year built for residential structures within the BOA is 1905, compared to 1953 for the city. Older housing stock presents the City with opportunities and challenges. While older homes often have great architectural details and character, they can be more costly to maintain and updates can require a significant time and monetary commitment.

As a result, many aging housing units have a lower market value, making them more likely to be used or converted to rental property. The added expense of maintaining these properties for a small return on investment makes them prone to deferred maintenance that detracts from the surrounding neighborhood. As of 2000, the BOA Study Area accounted for approximately 10 percent of the city's total rental units.

Recent trends in North Tonawanda's housing market include the conversion of former industrial and commercial buildings into market rate and luxury residential units. The Remington Lofts project, which includes the former Remington Rand industrial plan on Sweeney Street, will provide 84 residential units, a restaurant, and covered parking. The project is located on a former brownfield, and should be considered a model for brownfield redevelopment within the city. Additional opportunities for upper story residential are present along Webster Street, with several two and three story buildings having viable space in upper stories for apartments.

### 3.1.4 Employment and Occupation

The success and viability of a community is often tied to population growth and the various types of employment opportunities available in an area. According to the Census Bureau's 2006-2008 three-year estimates, manufacturing has been replaced as the lead industry in North Tonawanda by the education, health and social services industry.

***A positive sign for the region is the growth of professional and management industries, which now account for roughly 9 percent of employment. These industries typically offer higher pay and greater benefits, indicating a potential increase in disposable income.***

Manufacturing currently accounts for 18.2 percent of employment, down 4 percent from 2000. By comparison, manufacturing accounts for 7.5 percent of employment in New York and 11.3 percent nationally during the 2006-2008 period, which

equates to a decline of 2.5 and 2.7 percent, respectively, since 2000. The continued decline of large-scale manufacturing in North Tonawanda and the subsequent shift of employment to education, health and the service industries mirror other communities in the New York and throughout the nation. However, North Tonawanda continues to maintain a large base of small, niche manufacturing businesses. While a shift away from large manufacturing operations continues, the City has been successful in keeping small industrial businesses in the plastics, lubrication, and metal manufacturing industries. At over 18 percent of employment, manufacturing remains a critical component of the City's economy, employing significantly more individuals as a percentage of total employment than the State or nation.

***High levels of unemployment, as witnessed by the nation and region in recent years, can have severe long-term repercussions on consumer spending, housing and business development.***

Education, health and social services account for roughly 1 in 4 jobs, or 25.5 percent of employment in the city, according to estimates. This equates to an increase of 3.6 percent from 2000, and is well above the nation's current 21.3 percent level of employment for the industry-type.

The retail trade industry remains a strong component of the city's employment base at 11.3 percent, down 1.9 percent from 2000. This is roughly equivalent to the nation's retail trade employment level of 11.5 percent for the 2006-2008 three-year period.

A positive sign for the region is the growth of professional and management industries, which now account for roughly 9 percent of employment, up 1.6 percent from 2000, and nearly equal to the national industry level of 10.3 percent. Professional and management industries typically offer higher pay and greater benefits, indicating a potential increase in disposable income for households and an improved quality of life.

While the extent of individual employment industries continues to change within the city, occupational levels were steady between 2000 and 2008. Census estimates continue to indicate that the most prevalent occupations in North Tonawanda are management/professional, sales/office, and production/transport, holding steady at approximately 29, 28 and 20 percent of employment, respectively.

***Government estimates place North Tonawanda's median household income 4.7 percent lower in 2008 than 2000, which indicates a continued loss of purchasing power since 1990.***

The unemployment rate is a figure that provides a general sense of the community's economic health. Although it does not provide a complete picture, it does give insight into job trends in an area. According to 2006-2008 3-year estimates, the unemployment rate within North Tonawanda is 3.4 percent for all persons 16 years and over. When taken as a percentage of the labor force (those willing and able to work), the unemployment figure increases to 5 percent.

Through early 2010, the United States continues to suffer from a period of steep economic decline that began in late 2007. Unemployment rates nationally eclipsed 10 percent in October 2009, with indications that unemployment levels would continue to increase

into 2010. New York Department of Labor figures for the Buffalo-Niagara region have varied from 8.3 to 9.6 percent unemployment during 2009, indicating that unemployment levels have increased but not as severely as in other areas of the country. High levels of unemployment can have severe long-term repercussions on consumer spending, housing, and business investment. Recommendations made within the BOA Plan will be sensitive to the economic climate and the financial capabilities of both private industry and government.

### 3.1.5 Income

Income levels are measured in various ways. The most common measures are median family income and median household income. In order to obtain a more accurate picture of income levels for the City of North Tonawanda, median household income is the preferred measure, because it provides a clearer understanding of the purchasing power of city households.

The American Community Survey estimates place the city's median household income at $46,613 in 2008 inflation-adjusted dollars. This represents a decline of 5 percent from 2000 household income levels, and continues the trend of lost purchasing power seen since 1990. By comparison, purchasing power in New York increased over 2 percent, while nationally it declined slightly over the same period. See table 2 for more information.

***Table 2: Median Household Income, 2000 vs 2008***

| *Year* | *City* | *NYS* | *US* |
|---|---|---|---|
| *2000* | *$39,154* | *$43,393* | *$41,994* |
| *2006-2008* | *$46,613* | *$55,401* | *$52,175* |
| *2000 adj. to 2008* | *$48,955* | *$54,255* | *$52,505* |
| *Purchasing Power Change** | *-$2,342* | *$1,146* | *-$330* |
| *% Change* | *-5.02%* | *2.07%* | *-0.63%* |

*Note: Purchasing power is determined by taking the difference between the actual income figure for 2006-2008 and the 2000 figure adjusted for 2008 dollars. This is divided by the actual income to determine the change in purchasing power from 2000 to 2008.

# 3.2 CHARACTER AREAS

## 3.2.1 Overview of BOA Character Areas

To facilitate the analysis of the BOA, the study area has been divided into five Character Areas (see Map 4). Each Character Area includes portions of the study area with similar characteristics, land uses, urban form or architectural character. While the boundaries of each Character Area are finite, there are few instances where the transition from one area to the next is abrupt. Rather, there is a melding of characteristics between each Character Area.

For example, River Road is a transitional element between three different Character Areas. The level of land use conflict and lack of aesthetic coordination that currently exists along this corridor is in part due to the fact that it services and shares a relationship with the waterfront and downtown, while also serving as a regional vehicular corridor.

Considering each Character Area individually, while also understanding that they do not stand in isolation, presents a clearer understanding of the needs and opportunities to be addressed in later phases of the BOA study.

The following is a brief overview of the five Character Areas included within the North Tonawanda BOA, with greater detail provided in subsequent pages:

- **Downtown Central Business**
  North Tonawanda's urban core is largely defined by this Character Area, with Webster Street often described as the heart and activity center of the city.

- **Tonawanda Island & Little River**
  All lands on Tonawanda Island and those on the mainland with frontage on the Little River – including Weatherbest Slip – are included in this Character Area. This area represents the largest collection of water-dependent and water-enhanced uses within the BOA.

- **River Road Corridor**
  This Character Area includes the River Road and parallel railroad corridor from Felton Street south to Thompson Street. Niagara River waterfront properties in this character area end at the former Tonawanda Iron parcels south of Veteran's Park. Little River waterfront properties are not included in this character, which is dominated by transportation infrastructure.

- **Buffalo Bolt Business Park**
  The smallest of the BOA Character Areas, the Buffalo Bolt Business Park is a former brownfield that was remediated under the direction of the NYS DEC. A conceptual master plan for the redevelopment of the 33-acre site was developed, and the City is currently seeking a master developer or large tenant for the site.

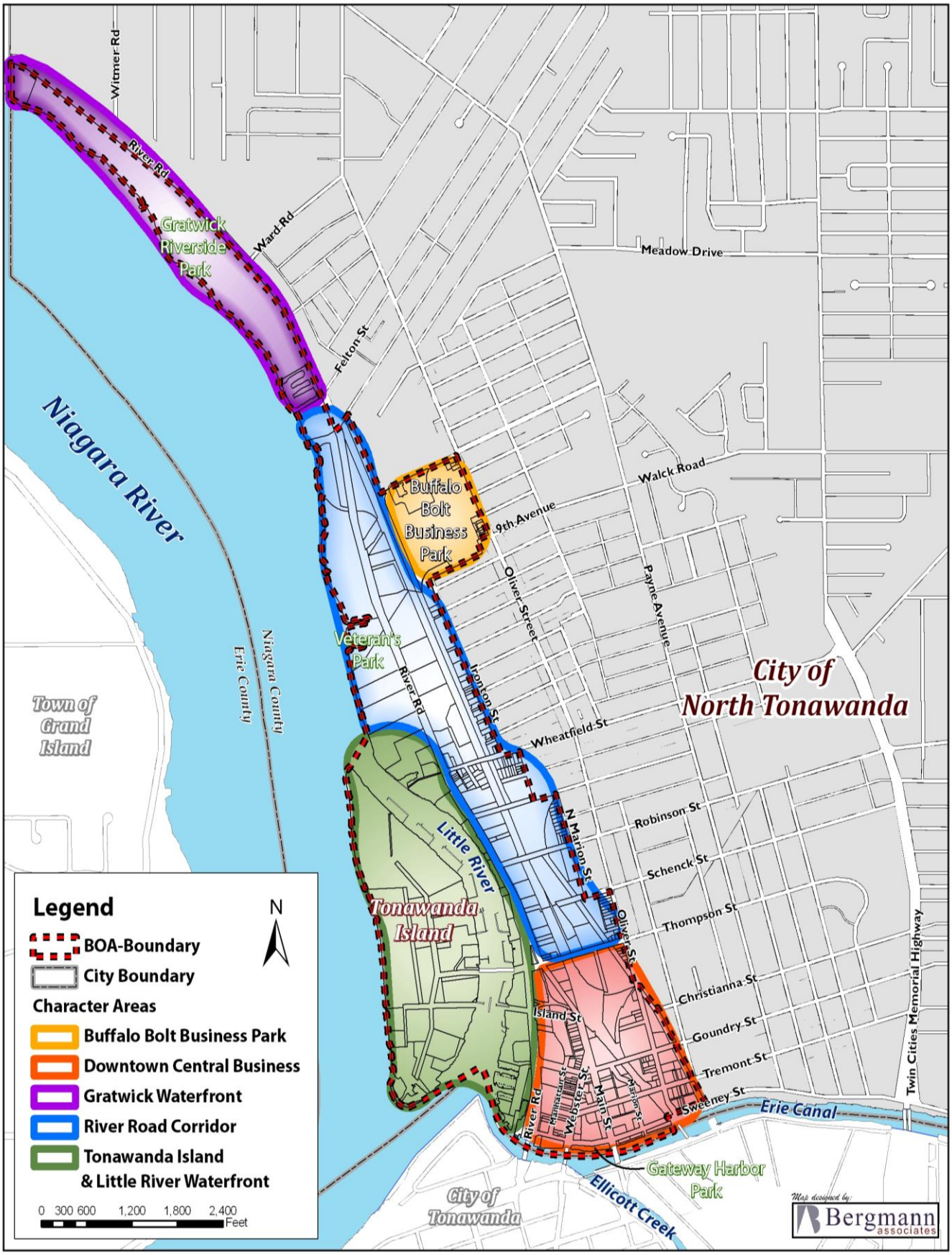
- **Gratwick Waterfront**
  Includes the city's Niagara River waterfront from the Town of Wheatfield to the City-owned marina facility. Gratwick Riverside Park, a remediated brownfield, is the largest and most significant parcel within this Character Area.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 4**
**Character Areas**

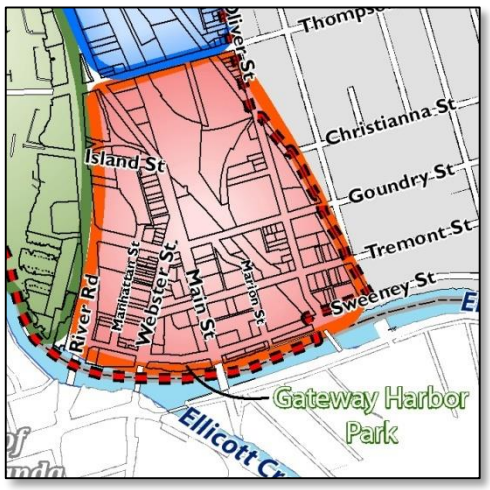


## 3.2.2 Character Area Descriptions

The following is a description of each Character Area established within the City of North Tonawanda BOA.

***DOWNTOWN CENTRAL BUSINESS DISTRICT***

The core of North Tonawanda's central business district is defined by Webster Street and Main Street. For the purposes of the BOA, the Downtown Central Business District Character Area includes properties bounded by River Road on the west, Thompson Street on the north, the former railroad and Oliver Street on the east, and the Erie Canal on the south. This encompasses the downtown core as well as adjacent areas that are impacted by, or can positively impact, the CBD.




*The boundary of the Downtown Central Business Character Area is shown in red.*

In total, this character area includes approximately 97 acres of land, 69 of which are real property, with the remainder as street right-of-way. The expansion of the central business district beyond the Webster-Main Streets corridor includes areas of commercial activity that provide employment and services to the surrounding community. The inclusion of these adjacent areas will facilitate the redevelopment of underutilized properties.

The core area is focused on Webster and Main Streets, and includes the quintessential "Main Street" urban form of buildings close to the street line, active storefronts, on-street parking, sidewalks, street lights and crosswalks. This portion of the city is extremely walkable, and is directly adjacent to Gateway Harbor of the Tonawanda's and the Erie Canal. Recent investments in this area include Gateway Harbor, the reconstruction of Main Street, and the on-going redevelopment of the former Remington Rand building into loft-style rental units and commercial space.



*View of Webster Street looking south.*

The area north of Goundry Street is a transitional space that contains significant commercial activity within a development pattern that spans many time periods. Areas of pre-WWII development are interspersed with more contemporary post-war suburban-style development. Additionally, the construction of River Road and the extension of Thompson Street across the Little River to Tonawanda Island rearranged circulation and future development patterns in this area.

The Oliver Street corridor, between the active and inactive rail lines, began as a neighborhood commercial district, and has since experienced sporadic redevelopment of more post-war style commercial establishments.

Land use within the Downtown Central Business Character Area is quite mixed, yet dominated by commercial businesses. Commercial land uses account for 59 percent of parcels, 74 percent of

assessed value, and 69 percent of land area. See Table 3 below for a complete breakdown of land uses.

***Table 3: Downtown Central Business Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Unclassified** | 5 | *3.1%* | 2.0 | *2.9%* |
| **Residential** | 22 | *13.6%* | 2.8 | *4.0%* |
| **Vacant** | 23 | *14.2%* | 8.5 | *12.3%* |
| **Commercial** | 96 | *59.3%* | 47.6 | *68.9%* |
| **Recreation & Entertainment** | 5 | *3.1%* | 1.9 | *2.7%* |
| **Community Services** | 3 | *1.9%* | 1.7 | *2.4%* |
| **Industrial** | 5 | *3.1%* | 3.7 | *5.4%* |
| **Conservation & Parks** | 3 | *1.9%* | 1.0 | *1.4%* |
| **Totals** | **162** | ***100%*** | **69.1** | ***100%*** |

*Source: North Tonawanda Real Property Tax Service.*

Current zoning within this Character Area is General Commerce and Light Industrial. Light Industrial accounts for the largest portion of land area within the character area, and permits a wide range of commercial and industrial land uses, but excludes residences. A complete description of each zoning district can be found within the Inventory and Analysis Section of the BOA report.



*The 'Teddy Bear' building, shown here prior to renovations, is located within the Downtown Central Business District.*

### *TONAWANDA ISLAND AND LITTLE RIVER*

The Tonawanda Island and Little River character area includes all of Tonawanda Island and lands west of River Road with frontage along the Little River, including Weatherbest Slip and Wardell's Boat Yard.




*The Tonawanda Island and Little River Character Area is depicted in green.*

The waterfront of the Little River, which separates Tonawanda Island from the main land, is more than 50 percent built-out with slips for more than 700 boats, including the anchor-shaped marina at the southern tip of Tonawanda Island. Additionally, approximately seven launches and/or repair lifts exist to service the numerous marinas in the Little River and surrounding area.

The shoreline uses of the Little River are mixed-commercial / marine, with nearly all uses categorized as water-dependent or water-enhanced. The inactive rail swing bridge and the Durkee Bridge significantly impinge on navigation within the Little River channel, and these limitations will need to be considered as part of future recommendations.

The Weatherbest Slip, also known as Gateway Point, area is a collection of boat houses located west of River Road at the confluence of the Erie Canal and the Little River. This area includes over 25 boat house structures and slips/dockage space for more than 50 boats with the inclusion of Wardell's Boat Yard. This area currently lacks sufficient accessibility to improved roadways, is located in a floodplain, and has been the subject of public debate and discussion regarding the level of public access provided to waterfront portions of these lands that legally remain under public ownership. An inactive rail swing bridge is located adjacent to this area and is considered to be an impairment to water travel as well as a safety hazard.



*View of the Little River looking north from the Durkee Bridge.*

Tonawanda Island is a tale of two waterfronts. The Little River waterfront, as discussed above, is largely a working marine environment, with nearly all waterside uses being water-dependent, including marinas, boat repair, and marine infrastructure businesses. The Niagara River shoreline on Tonawanda Island, in contrast, is vacant and underutilized, with a municipal water treatment facility and a restaurant.



*Image of the "working waterfront" near the southern tip of Tonawanda Island.*

As seen in Table 4, overall land use within the Tonawanda Island and Little River Waterfront character area is dominated by marine uses, which includes marinas, boat storage and repair, and marine infrastructure repair businesses. Marine uses account for 47 percent of assessed value and 50 percent of land area.

A significant industrial presence is located on Tonawanda Island, with the eight industrial properties accounting for 21 percent of assessed value. International Fiber and Taylor Devices both have large operations on the island, employing over 100 people each.

***Table 4: Tonawanda Island & Little River Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Unclassified** | 7 | *7.2%* | 0.0 | *0.0%* |
| **Residential** | 2 | *2.1%* | 0.0 | *0.0%* |
| **Vacant** | 49 | *50.5%* | 10.5 | *9.0%* |
| **Commercial** | 9 | *9.3%* | 23.6 | *20.4%* |
| **Recreation & Entertainment** | 16 | *16.5%* | 57.9 | *49.9%* |
| **Community Services** | 1 | *1.0%* | 3.0 | *2.5%* |
| **Industrial** | 8 | *8.2%* | 17.1 | *14.7%* |
| **Conservation & Parks** | 5 | *5.2%* | 3.9 | *3.4%* |
| **Totals** | **97** | ***100%*** | **116.0** | ***100%*** |

*Source: North Tonawanda Real Property Tax Service.*

Zoning in this character area is completely within the Waterfront District, which permits a variety of uses depending upon a property's location. Existing zoning limits residences to parcels without frontage on the water, permitting this type of development on just a handful of small parcels on Tonawanda Island. As residential has early on been identified as an integral part to the future vision of the BOA, modifications to existing land use regulations may become necessary.

### *RIVER ROAD CORRIDOR*

The River Road Corridor character area is bounded by Thompson Street on the south, River Road and the Niagara River on the west, the City-owned marina on the north, and the former railroad, Ironton, Carruthers, N. Marion, and Oliver Streets on the east. As the largest character area within the BOA, the River Road Corridor is dominated and defined by transportation infrastructure.




*The River Road Corridor is shown above in blue.*

The road corridor between the railroad line and the Niagara River has historically been a commercial and industrial district due to its proximity to both water and rail transport. In the late 1950's the Niagara Thruway (River Road) was completed, ushering in an era of increased reliance on cars and trucks, and a decreased reliance on rail travel. This ultimately left the City with underutilized rail infrastructure.

Land use within the River Road Corridor character area, as seen in Table 5, is dominated by commercial and vacant land uses, which occupy 65 percent of the land area and 53 percent of the assessed value. The 8 industrial parcels within the character area account for 23 percent of the assessed value on only 12 percent of the land.

The southern portion of the character area extends from Thompson Street north to Wheatfield Street, and is characterized by large commercial properties east of the rail line, and small commercial and industrial parcels along the east side of Main Street and River Road. The triangular area at the intersections of River Road, Thompson Street and Main Street is a potential signature location for a prominent gateway to the Downtown Central Business district.

The building stock along Main Street as it merges with River Road is mixed commercial in nature, with structures creating a saw-tooth street frontage as buildings have been removed and replaced over time. Some buildings have maintained their historic relationship to the existing street right-of-way, although the edge of the roadway has moved away from the building faces. This has led to areas of right-of-way that are excessively paved, diminishing the boundary of public and private property. Sidewalks are found intermittently along the east side of the street, with parking lots and driveways limiting continuity. Robinson Street is the only street connection from the east through the railroad corridor, with no sidewalk connectivity along Robinson to North Marion Street. As such pedestrian movement and mobility is limited in this area with improvements and upgrades needed.



*A view of River Road and the railroad corridor.*

The portions of the Character Area north of Wheatfield Street were historically open areas with large, individual industrial operations, such as

Tonawanda Iron, which had a significant operation on the east side of River Road just south of Veteran's Park. As a result, the urban form found along the Main Street portions is no longer present, and a more mixed commercial/industrial suburban-style development pattern has emerged. Land use in this part of the character area are more intense industrial, such as materials recycling, waste water treatment, chemical manufacturing, and others. Parcels in this area are much larger than southern portions of the corridor, and buildings are farther apart.

***Table 5: River Road Corridor Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Unclassified** | 1 | *0.6%* | 0.5 | *0.4%* |
| **Residential** | 71 | *42.3%* | 9.6 | *6.4%* |
| **Vacant** | 30 | *17.9%* | 29.2 | *19.4%* |
| **Commercial** | 54 | *32.1%* | 68.3 | *45.4%* |
| **Recreation & Entertainment** | 1 | *0.6%* | 1.9 | *1.3%* |
| **Community Services** | 8 | *4.8%* | 17.4 | *11.6%* |
| **Industrial** | 1 | *0.6%* | 14.2 | *9.4%* |
| **Conservation & Parks** | 2 | *1.2%* | 9.1 | *6.1%* |
| **Totals** | **168** | ***100%*** | **150.2** | ***100%*** |

*Source: North Tonawanda Real Property Tax Service.*

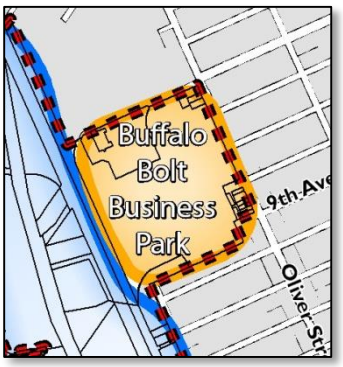
There is a general lack of connectivity between Oliver Street east of the corridor and River Road. The railroad line limits access to Wheatfield Street and Felton Street. The nearly one mile length of River Road between these intersections is subject to increased vehicular speeds which, when combined with the lack of sidewalks and extreme width of the corridor, create an unwelcoming environment for pedestrians.

Zoning for this corridor is a combination of Waterfront, Light Manufacturing and General Manufacturing. All lands west of River Road are zoned Waterfront, areas east of River Road and north of Wheatfield are zoned General Industrial, and lands east of River Road and south of Wheatfield are zoned Light Industrial. While the industrial nature of the uses along the corridor is appropriate, the visual aesthetic along the roadway is in need of aesthetic improvements as it serves as a major gateway to the city.



*View looking south along the rail line that parallels River Road.*

### *BUFFALO BOLT BUSINESS PARK*




*The boundary of the Buffalo Bolt Business Park Character Area is shown in orange.*

The Buffalo Bolt Business Park is the smallest character area which is focused around the 23.7 acre site which was utilized by Buffalo Bolt, Roblin Steel and others for manufacturing and industrial uses. After operations ceased on the site in 1986, the site fell into disrepair and was abandoned. In 1997, the City of North Tonawanda acquired the property, and in 2006 the City signed a consent agreement with the NYS DEC to remediate the property for conditional redevelopment. Approximately 10 acres of surrounding property is also included within the character area based on its inter-relationship to Buffalo Bolt and its current industrial-oriented land use.

The Buffalo Bolt Business Park character area is located north of downtown along Oliver Street's west side from 9th Avenue to East Avenue. The 33 acre area consists of 25 separate parcels, with 73 percent of the area currently classified as vacant, as noted in Table 6. There is a small cluster of commercial properties on the west side of Oliver Street that retain the original urban form and character. Armstrong Pumps currently operates a four acre facility in which it manufactures and ships products for use by commercial and industrial clients.

A concept master plan and set of design standards were created to spur the redevelopment of the Buffalo Bolt Business Park. The master plan includes a mixture of light industrial, manufacturing, office and retail land uses, as well as the extension of 10th Avenue from Oliver Street west to River Road.

Almost all of the character area is zoned General Industrial, except for the small parcels at the corner of Oliver and 9th Avenue which are zoned General Commerce.

***Table 6: Buffalo Bolt Business Park Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Unclassified** | 1 | *4%* | 1.9 | *5.7%* |
| **Residential** | 2 | *8%* | 0.2 | *0.5%* |
| **Vacant** | 13 | *52%* | 24.4 | *73.3%* |
| **Commercial** | 8 | *32%* | 2.8 | *8.5%* |
| **Industrial** | 1 | *4%* | 4.0 | *11.9%* |
| **Totals** | **25** | ***100%*** | **33.3** | ***100%*** |

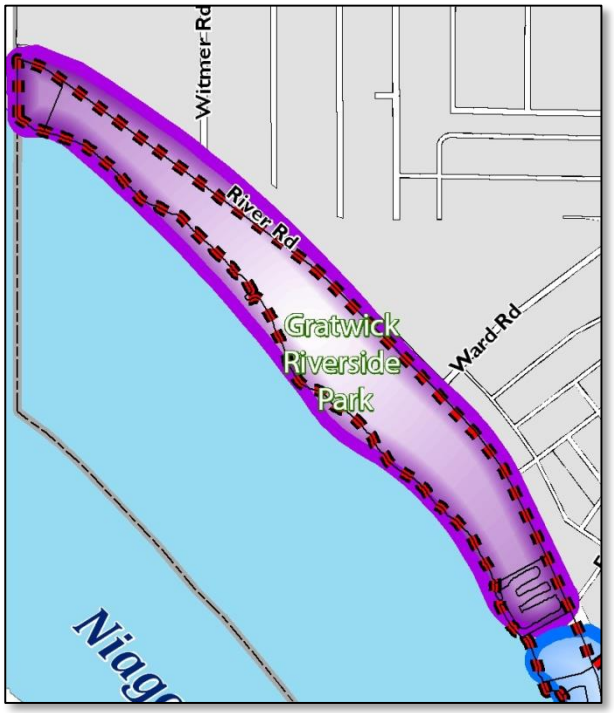
*Source: North Tonawanda Real Property Tax Service.*

As part of remediation efforts on the Buffalo Bolt property, the NYS DEC has limited the 23.7 acre property to commercial and industrial uses. With a potential connection to River Road, these uses provide an opportunity for greater intensity commercial and industrial development, yet limits traffic impacts to the surrounding residential neighborhoods.

The extension of 10th Avenue was completed in 2011 with the construction of an access road and roundabout to service eight newly created parcels from the original 23.7 acre Buffalo Bolt property. As of 2012, five of the eight parcels have been transferred to private interests for redevelopment, with the remaining three under agreement with neighboring Armstrong Pumps to facilitate future expansion.

### *GRATWICK WATERFRONT*

The Gratwick Waterfront character area includes three parcels totaling 58 acres, 91 percent of which is within Gratwick Riverside Park (see Table 7), owned and operated by the City of North Tonawanda. The park is a remediated brownfield, with an environmental easement held by the DEC that precludes uses beyond open space and recreation. The character area also includes a City-owned marina south of Gratwick Park and a private vacant parcel to the north of the park. In total, this character area boasts 5,700 feet (1.1 mi) of shoreline along the Niagara River.




*The extent of the Gratwick Waterfront Character Area is shown in purple.*

The Gratwick Waterfront differs from others within the BOA due to the fact it is not developed. Except for mounded earth forms at the southern end of the Park, there are clear views from River Road to the Niagara River throughout most of the character area.

Unlike portions of River Road to the south, this character area has greater connectivity with the residential neighborhoods to the east, with railroad crossing points at Felton Street, Ward Road, and Witmer Road. However, the existing characteristics of River Road at this location, the high speed of traffic, and the currently under-developed Gratwick Park result in limited pedestrian activity. Additionally, there are no sidewalks along River Road in this character area, nor are there striped crosswalks at the three intersections.

Gratwick Riverside Park has been identified as a major Niagara River corridor destination by the Niagara River Greenway Commission. The City of North Tonawanda recently developed a Master Plan for the future development of Gratwick Riverside Park. The plan, when implemented, will make the park a regional recreation destination for residents and visitors. The park is located within walking distance of a number of residential neighborhoods to the east side of the railroad tracks. Efforts should be made to provide enhanced connectivity to these residential areas to extend the usage of this park as a neighborhood and community destination for children and families.

The City-owned marina south of Gratwick Riverside Park has been identified as having significant redevelopment and rehabilitation opportunity. The City is planning to prepare a feasibility study for the marina to determine how the site can once again become a viable, active water destination.

***Table 7: Gratwick Waterfront Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Vacant** | 1 | *33.3%* | 2.9 | *5.1%* |
| **Recreation** | 1 | *33.3%* | 2.4 | *4.1%* |
| **Conservation** | 1 | *33.3%* | 52.5 | *90.9%* |
| **Totals** | **3** | ***100.0%*** | **57.8** | ***100%*** |

*Source: North Tonawanda Real Property Tax Service.*

# 3.3 INVENTORY AND ANALYSIS

The inventory and analysis component of the Nomination Study is intended to provide a greater understanding of the existing conditions, opportunities, and reuse potentials specific to the City of North Tonawanda BOA study area. The inventory and analysis is intended to lay the framework for specific recommendations for future land use and other implementation projects.

## 3.3.1 Existing Land Use

Understanding existing land use patterns is important when considering potential redevelopment scenarios for the Tonawanda Island BOA. Evaluating this information will assist in the identification of how proposed development can best fit into the existing urban fabric, and will indicate where zoning changes might be required to realize the shared vision for the BOA study area.

***Table 8: Existing Land Use***

| *Property Classification* | *Parcels* | *%* | *Acres* | *%* |
|---|---|---|---|---|
| **Residential** | 95 | *23.6%* | 12.6 | *2.9%* |
| **Vacant** | 75 | *18.6%* | 76.4 | *18.1%* |
| **Commercial** | 169 | *41.9%* | 142.6 | *33.4%* |
| **Recreation & Entertainment** | 23 | *5.7%* | 64.1 | *15.0%* |
| **Community Services** | 4 | *1.0%* | 4.6 | *1.1%* |
| **Industrial** | 22 | *5.5%* | 42.2 | *10.1%* |
| **Public Services** | 9 | *2.2%* | 19.6 | *4.6%* |
| **Conservation & Parks** | 6 | *1.5%* | 62.6 | *14.7%* |
| **Totals** | **403** | ***100%*** | **424.5** | ***100%*** |

*Source: North Tonawanda Real Property Tax Service.*

According to parcel data obtained from the City of North Tonawanda, the Tonawanda Island BOA comprises 446 parcels encompassing approximately 426 acres of land. Lands committed to public road rights-of-way and surface waters are not designated land uses. Within the Tonawanda Island BOA, public road rights-of-way and surface waters account for approximately 120 acres, or almost 22 percent of the entire study area.

The Study Area has 403 parcels representing approximately 425 acres of land (see Table 8 and Map 5). The Study Area's total assessed value is $54.94 million (including structures and improvements), which represents approximately 5 percent of the entire City of North Tonawanda. The following section describes the land uses in the Study Area, organized according to categories defined by the New York State Office of Real Property Services.

The property classifications of greatest environmental concern within the Brownfield Opportunity Area Program are likely to be Commercial, Industrial, and Public Service. These classifications account for land uses such as auto dealers, gas stations, fuel storage and warehousing facilities, manufacturing and production facilities, and landfills and utility substations.

***RESIDENTIAL***

The largest area of residential land uses within the BOA is found in the Wheatfield/Ironton Street area. These properties are mostly multi-family rental properties, with some single-family and owner-occupied units. Numerous residential units are located in and around the central business district, primarily along Oliver Street and Webster Street. The 162-unit senior apartment complex at the corner of Oliver and Goundry makes downtown the largest collection of housing units in the BOA. The on-going conversion of the former Remington Rand manufacturing complex into upscale lofts will add approximately 84 units within immediate proximity to downtown, further bolstering the downtown core

as a growing residential presence within the City. There are several residential projects being considered or discussed in the BOA, including up-scale units along the Little River, on Tonawanda Island, and along the Weatherbest Slip gateway to the Erie Canal.

***There are a number of opportunities for infill and upper story development within the central business district which would increase the number of people living downtown – creating a true 24-hour district.***

There are numerous opportunities for infill and upper story residential development within the downtown core; specific opportunities are discussed in Section 4 of the BOA Nomination Study.



*Multi-family building at the corner of Goundry and Manhattan Streets in the downtown core area.*

### *COMMERCIAL*

The BOA boundary includes 167 parcels classified as commercial properties, with 16 of these classified as apartment buildings. Commercial areas are found primarily in downtown along Webster and Main Streets, which creates the City's traditional urban feel. There are other pockets of commercial land located along Oliver Street and River Road. These areas are characterized by warehouses and multi-use buildings, most of which are between River Road and the CSX rail corridor.

Outside of Webster and Main Streets, the commercial character is rather diverse, and the urban character and form begins to break down with large areas of low-density development, particularly between Main and Oliver Streets north of Goundry Street.

### *INDUSTRIAL*

Twenty-two parcels encompassing over 42 acres are classified as industrial uses within the BOA boundary. The majority of this land is located on Tonawanda Island, with a few individual sites scattered in the downtown area and within the Buffalo Bolt Business Park. All of the parcels are classified generally as manufacturing and processing, which includes high tech manufacturing and light and heavy industrial uses. Predominant activities include chemical and plastics manufacturing, along with warehousing and tool and die businesses. The largest industrial operators within the BOA are International Fiber Corporation, Armstrong Pumps, and Taylor Devices.




*Former Remington Rand building, recently renovated into work-live residential lofts, commercial space and a restaurant.*

### *VACANT*

Vacant lands represent 18 percent, or 76 acres, of the land area within the BOA study area. In addition to these 76, more than 40 acres of land on Tonawanda Island are currently sitting idle or vacant, with only small portions of some of these properties in active use. The amount of space available on Tonawanda Island represents significant redevelopment opportunities for the City to explore as part of the Brownfield Opportunity Area project. Aside from Tonawanda Island, the largest collection of Vacant land is within the Buffalo Bolt Business Park, which contains approximately 30 acres awaiting redevelopment. Numerous Vacant properties are scattered throughout the BOA, providing significant opportunities for small infill development projects.

### *RECREATION AND ENTERTAINMENT*

There are currently 23 parcels classified as Recreation and Entertainment within the BOA. This land use classification includes facilities for assembly, amusement, and entertainment, along with marinas, sports facilities, camping grounds, and parks, and is typically reserved for properties under private ownership.

In the BOA Study Area, nearly all properties within this land use category are water-dependent businesses, such as marinas and marine repair. Recreation and Entertainment parcels are the third largest land use within the BOA, and are critical to the economy in North Tonawanda. Additional information on marine and recreational uses are detailed further in subsequent sections of this Inventory and Analysis.

### *COMMUNITY SERVICE*

The Community Service category includes facilities for education, religious assembly, health services, government buildings and properties, and cultural facilities. There are only four parcels classified as Community Service in the BOA, which total approximately one percent of the Study Area. The properties under this land use classification include the former Fire Training facility on Tonawanda Island, the Columbia Hook and Ladder fire station, the First Methodist Episcopal Church, and the post office at the corner of Goundry and Oliver.

### *PUBLIC SERVICE*

Public Services land uses are predominantly infrastructure and utility-related operations, such as communications, transportation, waste disposal, and energy. Six parcels within the Study Area are classified s Public Service, and include easement and transformer stations owned by Niagara Mohawk Corporation, City of North Tonawanda water and sewer treatment facilities, and Niagara Frontier Transportation Authority corridors.

### *CONSERVATION AND PARKS*

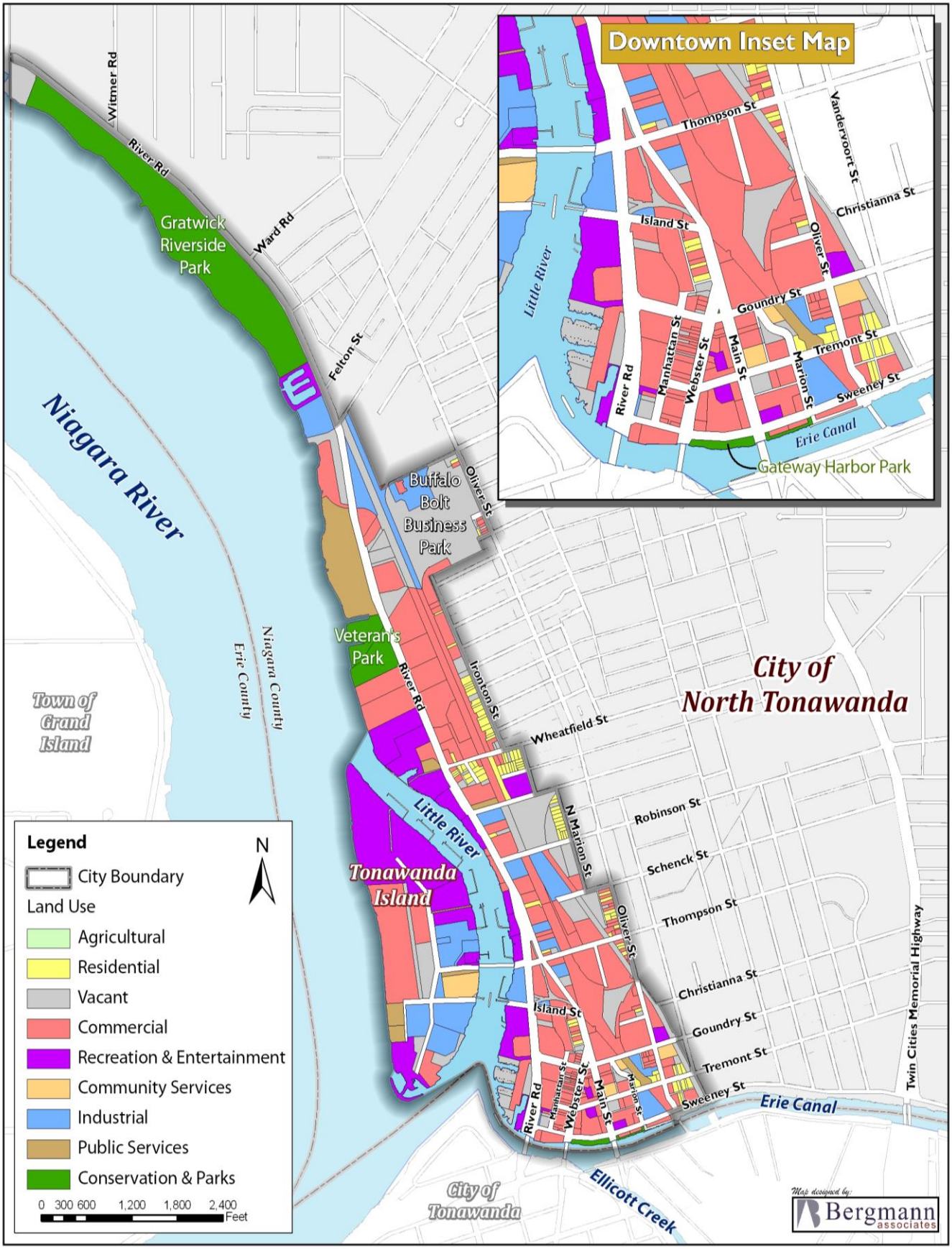
This land use classification includes private and state-owned forest and hunting lands, public parks, and conservation and wild lands, with all state-owned lands along the canal included in this category. The Study Area contains six parcels within this category, the largest and most significant of which include Gratwick Riverside Park located in the northwest portion along the Niagara River. Other Parks within the BOA include Veteran's Park, Gateway Harbor Park, and Charles R. Fleischman Park, a pocket park formed at the intersection of Main, Goundry and Webster Streets. A more complete description of these community assets is included in Section 1.2.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 5**
**Land Use**



## 3.3.2 Zoning Districts

Map 6 depicts the city's zoning districts, with six districts present within the BOA study area. The Waterfront District encompasses all lands west of River Road along the Niagara River, but does not include lands along the Erie Canal. Industrial districts are located on the east side of River Road and within portions of downtown. Commercial districts are located within the downtown core and along Oliver Street. See Table 9 for a complete breakdown of zoning districts within the BOA.

North Tonawanda's zoning code is cumulative in nature, with residential districts having the most restrictions, and commercial and industrial districts being least restrictive. This code and map have evolved over several decades without a comprehensive update. The City's attempts to accommodate the needs of property owners has resulted in a wide variety of districts and a considerable level of spot zoning, where individual parcels are singled-out for a specific zoning designation that is contrary to the surrounding land use pattern.

### *COMPREHENSIVE PLAN'S FUTURE LAND USE PLAN*

During the Comprehensive Plan process, several recommendations were made that would require changes to the existing zoning districts. The largest and most comprehensive of these changes relates to zoning for the waterfront and downtown areas of the city. The Comprehensive Plan's Future Land Use Plan recommends expanding the waterfront mixed-use area to encompass both sides of River Road, and stretch along the Erie Canal to Payne Avenue. These changes would provide a continuous corridor of similar development types and standards throughout the city's waterfront areas.

Among the Comprehensive Plan's recommendations, future land uses within the downtown should focus on mixed-use, with industrial activity taking place north of Thompson Street. This mixed-use district would also include portions of Oliver Street within the BOA Study Area. The recommended changes would create a unified downtown district and provide continuity for future redevelopment projects. These changes would also assist in the formation of a cohesive brand identity and wayfinding structure that creates a unique sense of place within the downtown and waterfront areas.

***Table 9: Existing Zoning Districts in the BOA***

| *Zoning District* | *Acres* | |
|---|---|---|
| | *Sum* | *% BOA* |
| **General Commerce** | 31.6 | *7.4* |
| **General Industrial** | 84.4 | *19.8* |
| **General Residence** | 7.2 | *1.7* |
| **Light Manufacturing** | 85.6 | *20.1* |
| **Neighborhood Business** | 1.3 | *0.3* |
| **Waterfront District** | 214.4 | *50.7* |
| **Total** | **424.5** | ***100%*** |

*Source: City of North Tonawanda Zoning.*

A brief summary of each zoning district within the BOA can be found below.

### *WATERFRONT DISTRICT (WD)*

The Waterfront District comprises 51 percent of the study area acreage and includes all lands west of River Road and all of Tonawanda Island. This district is largely intended to support marine-based and water-dependent activity along the waterfront. Limited opportunities for residential development exist, and only on property without frontage on a water body. Most uses identified in traditional mixed-use developments would not be permitted to have frontage on the water.

The overarching vision for the BOA is to create a destination on Tonawanda Island and to improve the Little River and River Road corridors. This vision

includes the desire to incorporate uses enhanced by a location along the water, such as mixed-use commercial/retail and residential development. Recommendations for specific modifications to the City's zoning code necessary to achieve the vision of the BOA plan are identified in later sections of the BOA study.

### *GENERAL COMMERCE (C-1)*

The General Commerce District covers seven percent of the BOA Study Area, and includes nearly all of the central business district and downtown portions of the city. The C-1 District allows residential uses, small-scale commercial uses, as well as more intense commercial uses such as dry-cleaning plants, bottling plants, warehousing, and trucking terminals. While they are needed within the city and region, additional development of these commercial uses within the downtown core would provide a sharp contrast to the desired urban form and uses in these locations.

### *GENERAL RESIDENCE (R-2)*

The General Residence District covers only two percent of the BOA Study Area, and is limited to one small pocket of land along Wheatfield Street. This district allows for single-family and multi-family developments, including apartment complexes. However, development opportunities within this district are limiting for non-residential uses, which include private clubs, nursery schools, and hospitals.

### *NEIGHBORHOOD BUSINESS (C-2)*

The Neighborhood Business Zoning District includes only one acre of land in the BOA at the intersection of Oliver and Thompson Streets. This district permits single-family, multi-family and apartment residential development along with retail and limited commercial and public services, such as banks, dentist and doctors offices, and government buildings.




*This business along Oliver Street is a good example of what is allowed in the Neighborhood Business zoning district.*

The types of uses currently allowed within this zoning district may be applicable to a greater amount of land area within the BOA, including those areas defined as downtown mixed-use and waterfront mixed-use in the City's Future Land Use Plan.

### *LIGHT MANUFACTURING (M-1)*

The Light Manufacturing District accounts for 20 percent of the BOA study area and is located within the downtown core, along Oliver Street, and east of River Road south of Wheatfield Street. The M-1 District is similar to the General Commercial (C-1) District, yet restricts residential uses and allows for more intense commercial and industrial activity.



*This is an example of the building types currently permitted in the Light Manufacturing district.*

While this zoning district is appropriate for many of the existing industrial and intense commercial activity occurring on the east side of River Road, it is not consistent with the vision for the BOA in the downtown area. Recommended considerations for modifying this zoning district are included later in this study.

### *GENERAL INDUSTRIAL (M-2)*

The General Industrial District is the third largest zoning district within the BOA, covering 20 percent of the land area. Nearly all property on the east side of River Road north of Wheatfield Street is within this district, which permits heavy industry and manufacturing processes such as concrete mixing plants, slag piles, and metal ore refining.

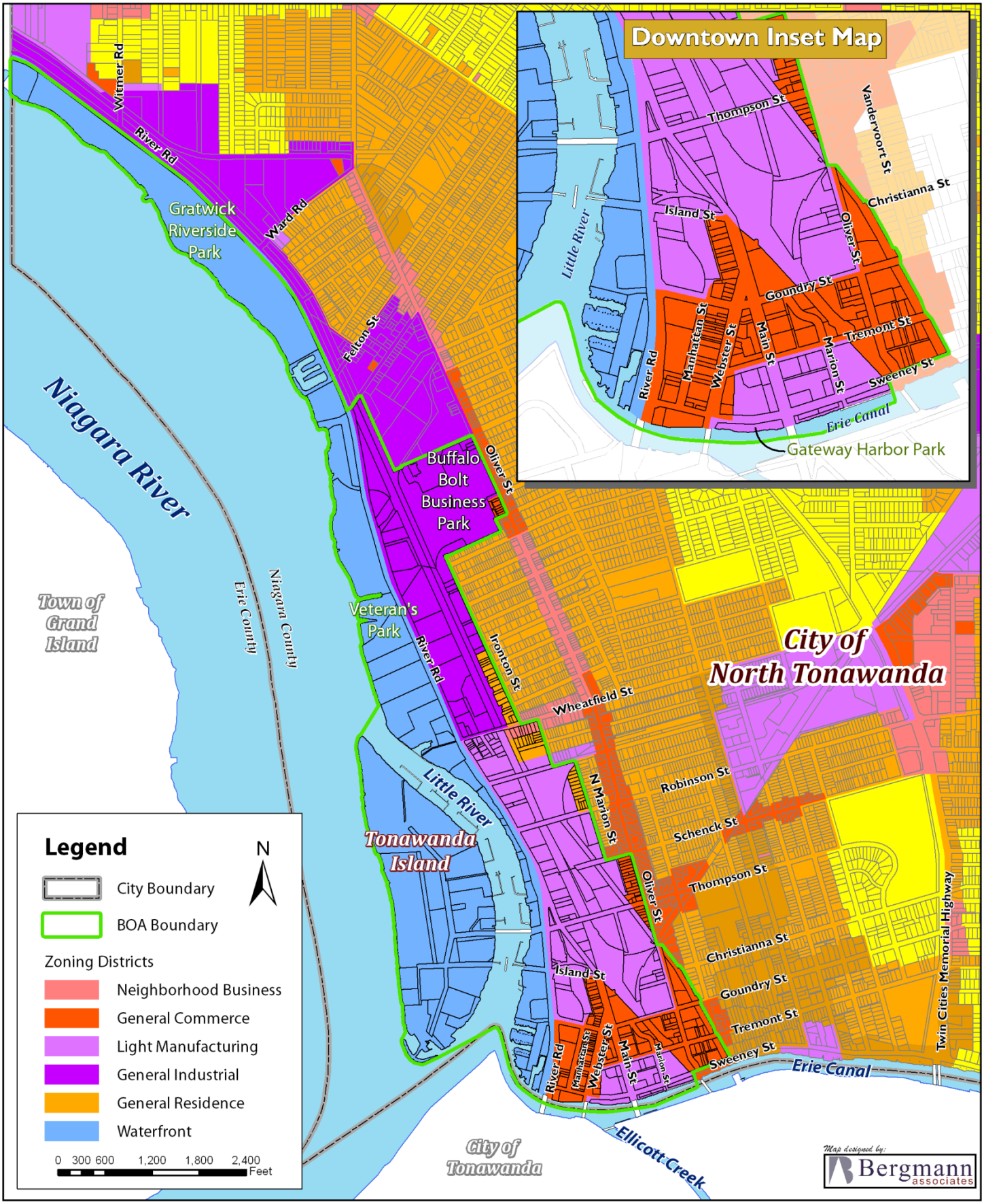
Excluding Buffalo Bolt Business Park, the intensity of uses permitted within this zoning district generally conflict with the desires of the community for the River Road corridor. Recommendations for modifications to this district are identified in subsequent phases of the planning process.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 6**
**Existing Zoning**



## 3.3.3 Development Incentive Programs

The presence of incentive districts or economic development zones can improve the likelihood of redevelopment by offering assistance to potential investors. New York State provides several programs that offer enhanced financing and tax credits to developers of brownfield properties. The State's Tax Increment Financing (TIF) laws are another vehicle through which project financing could occur to spur redevelopment. Additionally, the Lumber City Development Corporation (LCDC) offers low-interest financing for business activities in North Tonawanda for justifiable business uses including, but not limited to, financing of fixed assets, inventory, and working capital. The LCDC offers flexible rates, terms, and conditions on loans of at least $25,000.

### *Tax Credits*

New York State's Brownfield Cleanup Program (BCP) was established in 2003 and amended in 2008. The BCP provides benefits for the cleanup and redevelopment of brownfield sites including liability relief and tax credits. Tax credits are provided in four areas; cleanup, redevelopment, real property taxes and for the purchase of environmental insurance. An additional 2 percent credit is available for redevelopment activities conforming to a NYSDOS approved BOA master plan. The current BCP program sunsets on March 31, 2015.

The establishment of the Brownfield Cleanup Program required the Empire State Development Corporation to designate Environmental Zones (En-Zones), areas where these tax credits would be further enhanced. As of the 2000 Census, North Tonawanda did not meet the statutory criteria as an En-Zone, yet program boundaries and requirements may change in the future.

Owners of commercial properties on the National Register of Historic Places are eligible for a tax credit of up to 20 percent of rehabilitation work from the federal government. Additionally, the New York State Historic Preservation Office offers a 20 percent tax credit on income-producing and residential properties, up to $5 million and $50,000, respectively, as part of the NYS Rehabilitation Tax Credit program.

### *TAX INCREMENT FINANCING*

Tax increment financing (TIF) is a public financing method that is used to support redevelopment, infrastructure, and other community-improvement projects. TIF utilizes projected future gains in property tax revenue to cover principal and interest costs incurred through public borrowing. Although seldom utilized in New York State, a recent push to amend TIF laws was initiated in 2012 to broaden their use for economic development purposes.

### *NEW YORK MAIN STREET PROGRAM*

The LCDC has had significant success utilizing New York Main Street and NYS Community Development Block Grant funding programs to spur investment and renewal in downtown North Tonawanda. New York Main Street funding has helped rehabilitate the beautiful Riviera Theatre, provide assistance to 13 commercial units, and make streetscape enhancements along Webster and Main Streets.

***The Downtown Merchants Association of North Tonawanda is a dues-paying member organization involved with community activities and promotion of the historic downtown. This Association could be a starting point for the establishment of a Business Improvement District.***

In 2009, LCDC was awarded additional Main Street and CDBG funds to assist in the purchase and renovation of a large vacant structure on Webster Street across from the Riviera Theatre. Known as the "Teddy Bear Building," the 19th century, 3-story structure will house a boutique hotel and restaurant to serve the increasing number of visitors to downtown, and highlights the success of LCDC in utilizing State economic development funding.

### *BUSINESS IMPROVEMENT DISTRICT*

A Business Improvement District (BID) is an organization formed to provide enhanced services for the benefit of all district members. BID members pay an additional tax, and proceeds are used for services that benefit from economies of scale, such as advertising, streetscape improvements, security, and maintenance. The City of North Tonawanda does not currently have a formally recognized Business Improvement District. However, the Downtown Merchants Association of North Tonawanda is a dues-paying member organization involved with community activities that promote the historic downtown area, and could be a starting point for the establishment of a Business Improvement District. The benefits of a formal BID include enhanced fund raising capabilities via service fees, the ability to bond for capital projects, and the ability to apply for larger grant opportunities.



*The above image was taken in September 2010 of the rehabilitation and renovation of the former Remington Rand Complex on Sweeney Street.*

**Public – Private Financing Success Story**
**REMINGTON LOFTS**

Construction on the Remington Lofts, a $30 million renovation of the former Remington Rand building on Sweeney Street, began in 2008. Four years in the making, the project converted a long dormant four-story canalside typewriter factory into 81 loft apartments, work studios, a restaurant, fitness facility, conference center and sprawling rooftop atrium.

The 1.8-acre parcel includes an approximately 175,000 square-foot four-story building, and a single-story, 14,000 square-foot brick building that was formerly the Buffalo-Niagara Electric Railway powerhouse. The site has been associated with commercial/industrial use dating back to the 1880s, including lumber storage, shingle manufacturing, the manufacture of carousels and amusement park rides, as well as the manufacture of typewriters. Most recently, the complex was occupied by various commercial tenants including a chemical company, building contractors, and cabinetry makers. The occupancy by the Herschell-Spillman Co. has made the site eligible for Federal and State Historic Tax Credits, valued at up to $7.5 million, a key element in financing the project.

Public funding for the $30 million project came from at least eight different local, state and federal channels. A new agreement between the Governor and the state Legislature in 2009 paved the way for the use of the NYS Brownfield Cleanup Program, which provided tax credits equivalent to $1.8 million. Approximately $1 million from the Restore New York grant program, coupled with matching funds from a community development grant assisted with demolition and reconstruction. The Dormitory Authority of the State of New York and NY Main Street provided $981,000 for site improvements and public space enhancements along the canal and street. The Niagara County Industrial Development Agency put together a 14-year Payment-In-Lieu-Of-Taxes (PILOT) agreement for property tax abatement on the improvements.

This project is a model of public/private financing for the redevelopment of a former brownfield, with public benefits leveraged upon private investment to bring about the revitalization of a major community landmark. As part of on-going implementation of the BOA, LWRP and the City's Comprehensive Plan, the Lumber City Development Corporation will play a major role facilitating and procuring similar funding strategies for projects throughout North Tonawanda.

### 3.3.4 Sites of Environmental Concern

A primary objective of the NYS Brownfield Opportunity Area Program is to address blight in depressed communities that have been impacted by the presence, or perceived presence, of environmentally sensitive sites. The presence of these sites, or brownfields, has notable impacts on a community, including depreciation of property values and the discouragement of investment in surrounding properties.

***The benefits of brownfield redevelopment are tangible. They are realized by the community at-large and individual property owners who benefit from tax credits or other incentive programs.***

Although redevelopment of brownfield properties may be complicated, community-led revitalization plans can facilitate preparation of such sites for "shovel-ready" redevelopment. Active reuse of brownfields recognizes the intrinsic relationship between environmental sustainability and economic prosperity. Brownfield redevelopment benefits both individual property owners and the surrounding community. Brownfield property developers are eligible for tax credits and other financial and technical assistance that makes these redevelopment projects financially feasible. The surrounding community benefits from a reduction in perceived contamination risk and the influx of investment.

Community benefits become extremely tangible as projects move forward – properties are cleaned up and become environmentally sustainable, they are redeveloped to support the local tax base, new development shows signs of progress, and new uses spur additional redevelopment on surrounding lands.

In North Tonawanda, the perception of contamination is very real. Within the BOA, a number of large sites have undergone remediation and a number of significant sites remain with active industrial uses or remnants of active industrial uses and potential contaminants. Of the 403 sites present within the BOA boundary, 61 were identified as potential brownfields based on preliminary database research, as identified on Map 7. Collectively, these sites comprise 17.9 percent of total BOA parcel area.

***METHODOLOGY***

Brownfields are often commercial or industrial properties where mismanagement or improper handling of hazardous chemicals may have jeopardized the environmental integrity and/or public health of the surrounding community. Sites that handle large amounts of hazardous materials are subject to increased regulations from the NYS DEC and EPA due to the increased potential for environmental contamination.

In order to better understand the environmental conditions and impacts within the BOA, a preliminary Environmental Site Assessment (ESA) was conducted for each of the known or potential brownfield sites to gain a better understanding of existing conditions. Facility and site information, maintained at the local, state and the federal level, was reviewed to identify preliminary site conditions. Information was obtained from five main sources, including the following:

- Spills Incident Database (NYS DEC)
- Remedial Site Database (NYS DEC)
- Bulk Storage Database (NYS DEC)
- Envirofacts Database (US EPA)
- Property Assessment Database (North Tonawanda)

Sites listed in any of the five databases often warrant further attention because of historic contamination at the site, or because the nature of the facility has the potential for environmental contamination is greatly increased. A visual site assessment of each site with an environmental history, identified through desktop research, was conducted between December 9 and December 14, 2009. The purpose of the site visits was to identify the presence or likely presence of any hazardous substances or petroleum products on the property that indicate an existing release, possible prior release, or the threat of future release onto the property.

Information gathered during the ESAs and site visits was downloaded to a database designed specifically for the North Tonawanda BOA project. An interactive Site Profile Form was generated for each brownfield site that links to an electronic database. The database will streamline the City's access to property specific information, as well as enable modification of information as conditions within the city change.

Consideration was given to:

1. whether or not environmental contamination has occurred
2. the media impacted (i.e. soil or groundwater)
3. the potential for future environmental contamination to occur (i.e. presence and condition of petroleum or chemical bulk storage).

Community and planning factors relating to redevelopment potential were not taken into consideration during the preliminary assessment. The community will be given the opportunity to identify strategic sites other than those identified for environmental purposes during future public outreach efforts.

### *SITE DESCRIPTIONS*

Potentially contaminated sites require invasive environmental evaluation in the form of a Phase II Environmental Site Assessment (ESA) to determine the presence and extent of contamination. Those sites which are recommended as possible candidates for a Phase II ESA are noted below. Funding to complete the Phase II ESA is available through the NYS BOA program for the City and property owners willing to participate in the assessment process.

### *SITES OF LOW ENVIRONMENTAL CONCERN*

Properties were identified as having low environmental concern if they appear in an environmental database but there is no reason to believe that the property was directly or significantly impacted. For example, if a property was discovered to have a documented spill event, yet no other information is available, the site is not anticipated to be a significant environmental concern in the BOA and is classified as low priority. Four parcels comprising 10.9 acres were classified as low priority in the BOA, the result of spill events associated with the property identified during the environmental database review. However, the actual extent of environmental impairment on these four sites is not known.

Of the four low priority sites in the BOA, two were indirectly impacted by spill events on adjacent property, and two were identified as having direct impacts from on-site spills.

- Two of the properties comprise Veterans Memorial Park, located at the north end of Tonawanda Harbor. Both properties had a history of environmental spills that occurred adjacent to the property, impacting the surface of the Niagara River. The NYS DEC attributed these events to adjacent properties, and the actual

impact to the properties is unclear, though there is no suspected contamination on either property.

- The site located at 18 Dock Street is suspected to be associated with a spill reported in 1988 during which 15 gallons of petroleum was released into the Niagara River. Additionally a similar spill occurred the following year with an unknown volume of petroleum released into the Niagara River. Both spills were addressed and closed per the NYS DEC requirements.

- The property at 20 North Marion Street is associated with a reported spill in 1988 of an unknown substance that impacted area soil. The spill was closed shortly thereafter, indicating the spill was adequately addressed.

***SITES OF MODERATE ENVIRONMENTAL CONCERN***

Properties were identified as being of moderate environmental concern if:

1. they were listed in an environmental database
2. there is unknown prior use but visual evidence of environmental impact (i.e. surface staining, abandoned drums, or evidence of debris or fill)
3. groundwater wells were visible on the property.

Forty-five parcels within the BOA have been classified as being of moderate concern, with some of these sites being identified on multiple databases. These sites comprise a total of 75.6 acres, and are summarized below:

- Thirty-three of the sites are locations of spill events that had impacted soil or groundwater. All spill events for the listed sites have subsequently been closed, indicating they have adequately met NYS DEC cleanup requirements and contamination is most likely not a concern.

- Seventeen of the sites are listed as bulk storage facilities by the NYS DEC, indicating the facility has combined storage exceeding 1,100 gallons. The sites listed as bulk storage facilities primarily store petroleum based products (PBS), while a few also have on-site chemical bulk storage (CBS). Sites with bulk petroleum or chemical storage may warrant additional attention because the threat of environmental contamination is higher due to the volume of material being handled on-site. If storage tanks are not properly maintained, leaks or spills may occur, impacting the soil and possibly groundwater.

- Eight of the parcels are listed as Conditionally Exempt Small Quantity Generators (CESQG). To qualify as a CESQG, a site must generate less than 220 pounds (27.5 gallons) of hazardous waste per month and store no more than 275 gallons of hazardous waste on-site. A CESQG may treat or dispose of the hazardous waste in an on-site facility, or ensure proper off-site disposal. Such facilities are subject to stringent federal requirements to ensure hazardous materials do not impact the surrounding environment on which they are produced, nor provide a threat to public health. A listing as a Small Hazardous Waste Generator does not indicate *actual* hazardous waste production, but provides the necessary certification to undertake these activities on-site. Hazardous wastes are those generated that are dangerous or potentially harmful to the health or environment as identified through EPA sampling and testing methods.

The sites described above all have historic or ongoing commercial or industrial activities that make them more susceptible to contamination. When the extent of potential contamination cannot be determined through visual and historic assessment, it may be necessary to conduct a Phase II ESA to determine

whether or not such activities have impacted the property.

Sites that may be more likely to require additional environmental investigation and possibly require remediation are identified in Table 10. However, it should be noted that further assessment and cleanup of the listed sites will be contingent on owner cooperation. Sites that are currently under public ownership and/or are currently vacant are more likely to move forward with a Phase II ESA, unless there is support and interest by a private property owner.

***Table 10: Summary of Environmental Sites That May Require a Phase II ESA***

| *Address* | *Ownership* | *Environmental Concern* | *Rationale* |
|---|---|---|---|
| **63 Oliver Street** | Private | Unregulated PBS tanks | Bulk storage tanks require a higher level of regulation due to the volume of contaminants. If a site is not in compliance with NYS DEC regulations, the threat for spills is higher. |
| **161 Tremont Street** | Private | Unregulated PBS and CESQG | If a site is not in compliance with NYS DEC regulations, the threat for leaks and spills is higher. Listing as a hazardous waste generator also indicates handling of waste not suitable for disposal in standard landfills. |
| **210 Sweeney Street** | City of North Tonawanda | Visual evidence of soil impacted by hydraulic oil | Visual staining indicates there was a release on the property. A Phase II may be required to determine the extent of contamination and need for remediation. |
| **900 River Road** | Private | Existing monitoring wells identified | Monitoring wells indicate that the presence of groundwater contamination is suspected. The site also has former spill events from which groundwater was impacted by chlorinated solvents. Groundwater provides a mobile medium for contamination, which can then travel offsite creating a plume. |
| **871 River Road** | Private | Unregulated PBS and CBS, chemical drums visible throughout the property | If a site is not in compliance with NYS DEC regulations, the threat for leaks and spills is higher. |
| **830 River Road** | City of North Tonawanda | CBS facility, CESQG | Due to the volume of chemicals and/or hazardous waste that may be handled at the site, there is an elevated potential for environmental contamination. |
| **765 River Road** | Private | CESQG | Listing as a hazardous waste generator also indicates handling of waste not suitable for direct disposal in standard landfills, which may have greater impact on public health or the environment if released. |
| **555 River Road** | Private | PBS facility and historic spill site | The site has a long history of spill events that have impacted area soil and groundwater. Additionally, the site is a petroleum bulk storage facility, indicating the likelihood for future spills to occur. |
| **512 River Road** | Private | PBS facility | The site is currently an active PBS facility and is slated for future residential waterfront development. It's possible that historic use of petroleum products have jeopardized the environmental integrity of the property. |
| **87 Robinson Street** | Private | Unregulated PBS facility | If a site is not in compliance with NYS DEC regulations, the threat for leaks and spills is higher. |
| **51 Robinson Street** | Private | CBS facility, unregulated PBS facility, historic spill site | The volume of chemicals and petroleum handled at the site increase the potential for contamination. Furthermore, the site has spill history that impacted area soil and groundwater. Groundwater increases contaminant mobility, facilitating travel off-site. |
| **90 Taylor Drive** | Private | Visible drums, CESQG | There is visual evidence of on-site storage of materials, possibly hazardous. In addition, the site is a small quantity hazardous waste generator, indicating it may handle materials not suitable for direct disposal. These materials are generally more hazardous to the environment and public health, and have stringent disposal regulations. |

### *SITES OF HIGH ENVIRONMENTAL CONCERN*

Sites of high environmental concern located within the BOA include industrial sites with a known site history that:

1. are a large quantity hazardous waste generator, or
2. are an active petroleum or bulk storage facility not in compliance with regulations, or
3. are an active spill event site, or
4. are listed in the NYS DEC environmental remediation databases.

There are 11 sites within the BOA classified as a high environmental concern. Six of these sites are active spill sites or existing brownfields, and the remaining five sites require a Phase II ESA to identify whether or not contaminants are present. Many of these sites are characterized by rigorous industrial activity that has most likely compromised the environmental integrity of the site.

**Environmental Remediation Programs**

The six active spill sites or existing brownfields are enrolled in existing DEC remediation programs. Enlistment in any of the DEC remediation programs is indicative of existing contamination that must be addressed through Phase II and Phase III ESAs. The current status of each site, as well as plans for site redevelopment, is discussed below.

*Site 1: 101 East Avenue (Former Roblin Steel Site, now Buffalo Bolt Business Park) - Remediation complete*

Buffalo Bolt operated the site from 1918 to 1961, followed by the Roblin Steel Company until 1987. The 23.7 acre former steel processing facility is located approximately 1,000 feet east of the Niagara River, in the northern portion of the study area. The site contained several above ground and underground storage tanks, which were removed as an interim remediation measure in 2000. Contaminants of concern at the site include polychlorinated biphenyls (PCBs), metals, semi-volatile organic compounds, and volatile organic compounds. An environmental deed has been placed on the property which includes an environmental easement, groundwater use restrictions, and a land use restriction. In addition, a soil management plan was completed to guide future development efforts in the event that impacted soil is encountered during redevelopment. An approved operation and maintenance plan for the site's institutional controls and long-term groundwater monitoring is in place. The site was delisted from registry on January 5, 2009, indicating that remediation is complete. Long-term monitoring of the site will be required. The City is currently pursuing commercial and light industrial redevelopment on the property.

*Site 2: 9 River Road (Gratwick Riverside Park) - Remediation complete*

Gratwick Riverside Park is a 53 acre parcel located on the Niagara River. Between 1938 and 1968 the property was used as a municipal landfill until its closure. The City of North Tonawanda reopened the property for use as a public park in 1969. Since that time, the site has been identified to have groundwater contaminated with heavy metals, organics and polychlorinated biphenyls (PCBs) requiring remediation. Engineering controls to the site include, but are not limited to, a soil cap, installation of a slurry wall between the landfill and Niagara River, and installation of a groundwater collection system. A deed restriction was placed on the property to restrict groundwater use and future land uses, limiting redevelopment opportunities. Today, the site is a public park with recreational access to the Niagara River.

*Site 3: 815 River Road - Remediation complete*

The 815 River Road site is a one acre parcel that was formerly owned by a company that leased and maintained school buses. The site contained several underground storage tanks. As an interim

remediation measure, the City removed 14 underground storage tanks and associated petroleum contaminated soils, as well as approximately 7,700 tons of contaminated soil for disposal. A Site Management Plan is awaiting approval and an Environmental Easement has been completed. The easement limits future redevelopment of the site to commercial uses. Future groundwater sampling and annual certification are required to ensure that the site is in compliance with its intended use.

*Site 4: 184 Sweeney Street (Remington Rand Building) - Remediation underway*

The Remington Rand site is located on 1.8 acres in the southern portion of the North Tonawanda BOA study area. The property is bordered by the Erie Canal to the south, an industrial rail line to the east, and commercial properties to the north and west. Historically, industrial and manufacturing processes took place on-site. An application was submitted for incorporation into the DEC Brownfield Cleanup Program to address existing petroleum, chlorinated solvents, semi-volatile organic compounds, metals, and PCB residual contamination. Remedial investigation commenced in April 2009 and the site was redeveloped in 2012 as a mixed-use residential and commercial development.

*Site 5: 55 Schenck Street (Schreck's Scrapyard) - Remediation complete*

The former site of Schreck's Scrapyard is a two acre site that was used as an iron and metal salvage yard. Constituents of concern at the site include metals, cyanide, volatile organic compounds, and PCBs. Approximately 50 to 60 drums were found buried onsite. As part of remediation, 7,000 gallons of contaminated liquids, 24 truckloads of contaminated soil, and 91 tons of hazardous soil were removed from the property. Remediation was completed in 1991 and required ongoing site maintenance and monitoring. The site was purchased in 2008 by Smurfit Stone Container Corporation for tractor trailer storage. The site owner is responsible for ongoing site maintenance and groundwater monitoring.

*Site 6: 76 Robinson Street (Booth Oil Company) - Remediation complete*

The Booth Oil site is located on a 2.5 acre parcel in an industrial and commercial portion of the study area. The site is bisected by industrial railroad tracks, and was formerly used to store and process waste oil. Much of the site was found to be saturated with spilled oil, and a sampling program was consequently initiated and completed in 1986. The soil, groundwater and former catch basins located on the site were found to contain elevated levels of volatile organic compounds, semi-volatile organic compounds, lead, and PCBs. The recommended remediation of the site included excavation and off-site disposal of contaminated materials. Remedial efforts have been completed, though the site requires long-term maintenance and monitoring. An environmental deed has been placed on the Conrail portion of the site, intended to restrict future development to specific uses. A similar deed has not been placed on the portion of property owned by Booth Oil Company. To date, the owner of the Booth Oil Company assumes long-term maintenance and monitoring responsibilities.

**Active Spill Sites**

Two sites are identified as high priority due to listing as active spill event sites with unknown impact or in which groundwater was impacted. These sites remain active if the contamination from the spill has not yet been addressed. The two sites are described in further detail as follows.

*68 Main Street:*

This property appears to be a former garage and has an abandoned well to the south of the building. The well indicates that groundwater monitoring occurred on-site at a point in time. Spill records identify that an unknown substance associated with commercial and industrial activities was reported to be spilled on the property on July 16, 2009. To date, this spill remains active, indicating that the contaminants have not been addressed.

Next steps for this site should be to determine the type and extent of contaminant impact through a Phase II Environmental Site Assessment, and to address contamination with an approved closure by the DEC. If the area of impact cannot be fully remediated, an environmental easement should be considered to restrict reuse potential to commercial or industrial uses. The site is currently identified for Motor Vehicle Service land use and is privately owned. Therefore, further assessment and cleanup will be contingent on owner cooperation.

*105 Main Street:*

A small plaza containing a bank, salon, physical therapy office, paint shop, and vacant office space is at this location. Site visits did not identify any existing hazards, however a spill was reported in September 2006 indicating release of an unknown volume of petroleum that impacted groundwater. To date, the site remains an active spill site indicating that groundwater contamination has not yet been addressed.

Next steps for this site should be to determine the area and extent of impact through a Phase II Environmental Site Assessment. Investigation should focus on petroleum related compounds and identify the extent of the contaminant plume. It may be necessary to implement a groundwater monitoring and sampling program, or to consider controls to contain and mitigate existing contamination or exposure. An environmental easement should be considered to restrict groundwater use and future land uses if determined to be a significant issue.

**Unregistered Storage Tanks**

Two sites were identified as being of high environmental concern due to the presence of registered or unregistered above ground storage tanks, which were identified during site visits.

*85 Main Street:*

The site is currently owned by Mi-Ken Transmission. Site visits revealed two 275 gallon storage tanks on the property. Because the site was not listed in the DEC database, the tanks may not be meeting the State's appropriate operation and maintenance guidelines. As a result, there is greater risk for leaks or spills at this location.

If the site changes ownership or is to be redeveloped, a Phase II may be necessary to identify the extent of impact that past and current uses have had on the property.

*93 East Avenue:*

Niagara County currently owns the site, which has a history of spill events that have subsequently been closed. Site visits indicated that a 500 gallon aboveground storage tank is present on the site, but not in the NYS DEC registry. In addition, a large flammable cabinet was observed. The volume of materials onsite and the risk of ignition create several

environmental hazards that pose a risk to the environment, health, and safety of those in the surrounding area. Visibility was limited during the site visits and therefore it was not clear if additional tanks are being stored on site.

A Phase II Environmental Assessment is warranted to determine whether existing tanks are properly maintained or if improper storage is compromising the surrounding environment.

**Multiple Listings**

One site was identified as high environmental concern due to multiple listings in the databases. The site located at 369 River Road (Valkro, Inc.) is a chemical bulk storage facility that also has visible fuel tanks located throughout the property. In addition, the site is listed as a small hazardous waste generator. Hazardous waste is required to either be treated on-site, off-site, or arranged for off-site disposal. Waste characterized as "hazardous" requires disposal at certified landfills. The only landfill in New York State certified to handle hazardous waste is located in Niagara Falls, NY. Additionally, the site has a spill event history, indicating the likelihood of contamination on the property.

Due to the numerous environmental hazards present on site, a Phase II Environmental Site Assessment should be conducted to confirm whether or not activities resulted in significant contamination.

***SUMMARY***

Many of the 61 sites within the BOA that have been identified as sites of environmental concern warrant further investigation based on the uncertainty regarding historic use and potential contamination.

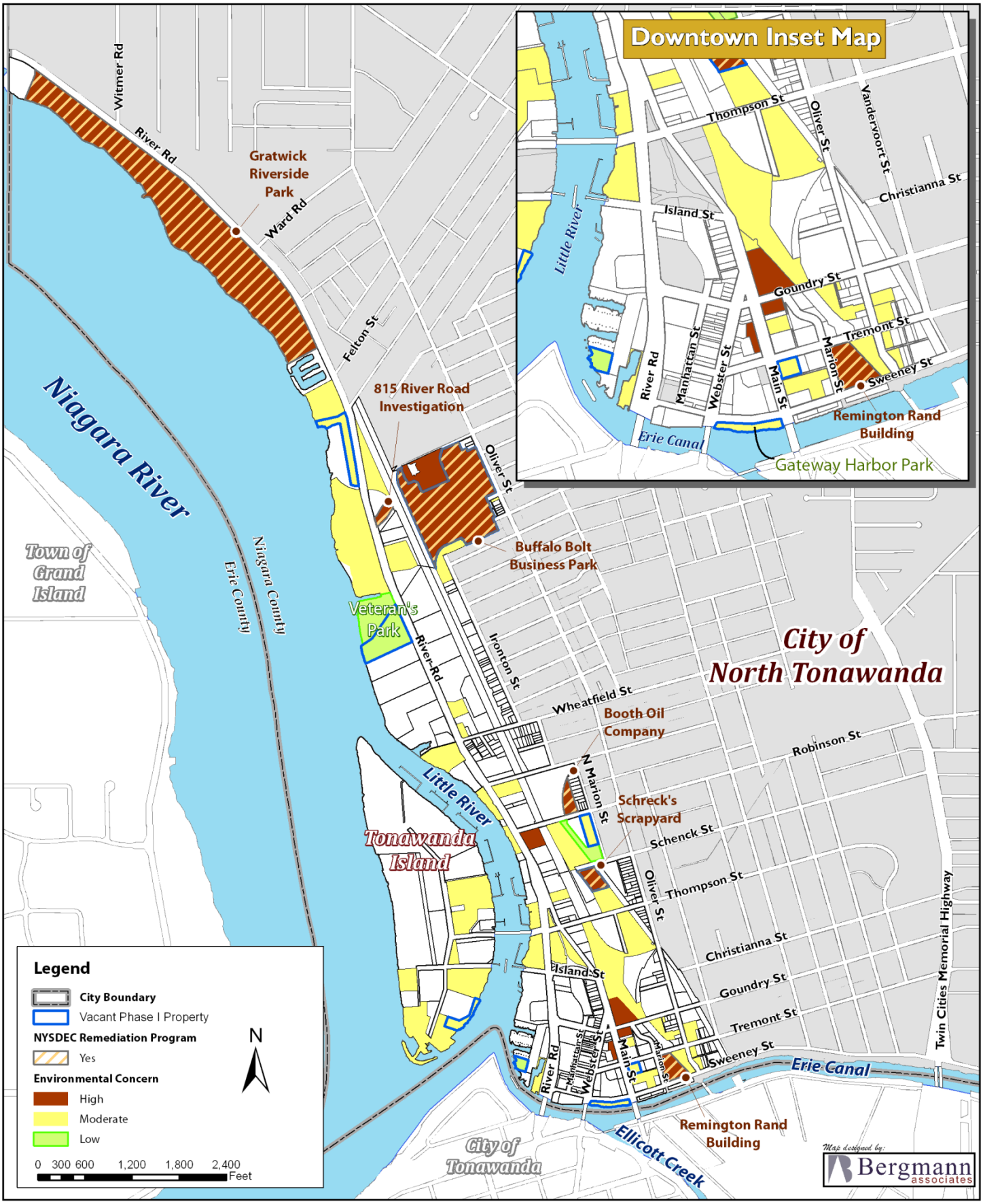
Future investigations as part of the BOA Program should identify whether or not contamination exists onsite through soil testing. Knowledge of the type of contamination present will inform property owners regarding the financial costs and timeframes associated with remediation, as will assist in the identification of targeted incentive programs, tax credits, or funding that might exist to assist with the process.

Information reviewed during this analysis is not comprehensive, and may require amendment as new information is obtained. Further discussion with the Steering Committee and public regarding the historic use of properties within the BOA should continue throughout the remainder of the BOA Nomination Study. Many of the properties within the BOA that were involved in DEC remediation programs have require long-term monitoring and maintenance of engineering controls, but are ready for redevelopment in accordance with any required environmental easements.

The current challenge the City faces involves overcoming the stigma associated with the industrial history and former contamination of brownfield sites in order to pursue redevelopment opportunities. Site specific strategies will need to be formed because of the presence of environmental easements, institutional controls, and deed restrictions that were placed necessarily on some of the contaminated properties. These strategies should be developed for previously remediated site, as well as other catalytic sites identified within the BOA Plan.

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

## Sites of Environmental Concern



### 3.3.5 Vacant and Underutilized Sites

In total, there are approximately 102 parcels that have been identified as vacant or underutilized, totaling 149 acres, or 35 percent of the Study Area. These properties are located throughout the Study Area. Primary concentrations of vacant and underutilized sites are found on Tonawanda Island, at the site of the former Tonawanda Iron Works on River Road, at the Buffalo Bolt Business Park, and along North Main Street. Each of these sites is indicated on Map 8.

#### *VACANT SITES IN THE BOA*

According to data obtained from the New York State Office of Real Property Services, 74 vacant sites are located within the BOA boundary, eight of which are also identified as potential brownfields. Vacant sites are determined by real property classifications through the City's assessor, and include vacant commercial, residential, and industrial lands.

While vacant sites can have negative impacts on a neighborhood or study area, they also provide opportunities for new development. These sites, once confirmed to be free of environmental contamination, provide a clean slate to developers because they typically do not require extensive site preparation, potential demolition of existing structures, or retrofitting of existing buildings. Vacant properties should be viewed as key opportunities for redevelopment in the BOA. Property that is both vacant and occupying high-value locations are given priority in determining strategic sites for redevelopment and infill development within the study area.

Buffalo Bolt Business Park represents the largest contiguous area of vacant land within the Study Area. A redevelopment vision has been generated through a master planning process to create a business and industrial park that would include an extension of 10th Avenue to intersect with River Road. The potential for this business park as an employment generator would likely have positive spillover effects on the commercial and residential portions of the surrounding neighborhood.

Adjacent to Buffalo Bolt Industrial Park along River Road is a cluster of vacant and potential brownfield sites in the vicinity of the 815 River Road property. These lands are currently utilized for the storage of construction materials. Several of these properties are owned by the City, which would aid in the redevelopment process. An opportunity exists for these parcels to be redeveloped in concert with Buffalo Bolt to provide complementary and support uses that may not be appropriate along Oliver Street and within the surrounding residential neighborhood.

A large swath of land exists adjacent to the Booth Oil brownfield property which currently contains an infrequently utilized rail siding. To the north of this parcel is a small City park and playground area. Opportunities for the expansion of this neighborhood park to include useable portions of the vacant property should be investigated.

There are numerous opportunities for infill development on vacant land within the BOA. For instance, a small yet highly visible property is located at the corner of Goundry and Webster Streets. This location would be inviting for a multi-story mixed-use building with quality first-floor office space and market rate upper-story apartments.

#### *UNDERUTILIZED SITES IN THE BOA*

Underutilized sites are also identified based on field and site visits. Like vacant sites, these properties provide increased opportunity for reinvestment in the city. These sites may have existing uses, but those uses may not be considered the highest and best use for a given parcel when considering its strategic location or potential to serve as a catalytic site for redevelopment. Underutilized sites are identified as

part of the planning process when considering opportunities for new project development. Twenty-eight sites have been identified as underutilized within the BOA, four of which are also suspected brownfields.

The largest grouping of contiguous underutilized parcels is on Tonawanda Island. These lands are comprised of the former International Paper site and the Jones Box Company, representing over 40 acres of redevelopment potential along the Niagara River waterfront. These parcels were included as a priority site in the recent Revisioning Brownfields Regional Strategic Approach conducted by Niagara and Erie Counties and the cities of Buffalo, Niagara Falls, Lockport, and North Tonawanda in 2007.

The Revisioning Brownfields report developed a conceptual site plan for Tonawanda Island that included a large public park at its northern tip and mixed-use commercial and townhouse/condominium residential land uses in the island's central portions. A large waterfront pedestrian plaza was planned as a central organizing feature that would be linked with the park to the north via a waterfront promenade. The preliminary vision developed during this project laid the foundation for the potential redevelopment of Tonawanda Island as a mixed-use destination with gathering spaces, waterfront accessibility, and the preservation of scenic quality.

An additional underutilized property located on Tonawanda Island is the former fire training facility near the landing of the Durkee Bridge. This property is largely vacant and sits at a highly prominent location at the entry to Tonawanda Island. Redevelopment opportunities should take advantage of its high visibility from the Durkee Bridge, its current public ownership, and its waterfront location. The redevelopment of this parcel has the potential to be an early implementation project for the City. Therefore, any project in this location should be of a high quality that sets a unique and lasting precedent for future development on the island.

A large grouping of mainland parcels is located along River Road on the site of the former Tonawanda Iron Works. These properties have undergone various degrees of redevelopment, yet they do not fully leverage their location on the water with their proximity to downtown and Tonawanda Island. These parcels represent a significant opportunity for water-dependent and water-enhanced development adjacent to Tonawanda Harbor. The potential for a coordinated mixed-use development that encompasses multiple parcels should be investigated. Such a development should provide frontage along River Road, while providing continuous public access along the waterfront and a connection to Veteran's Park.



*Portions of Main Street north of the intersection with Goundry Street.*

A smaller grouping of underutilized properties can be found between River Road and Main Street north of Island Street. The redevelopment of these parcels was conceptually investigated during the City's Downtown Redevelopment Plan, which recommended mixed-use commercial, retail, and potentially upper story residential. These parcels occupy a highly visible location and gateway entrance into downtown from the north. The redevelopment of this gateway should be consistent

with the findings of the City's Downtown Wayfinding Plan and the LWRP.

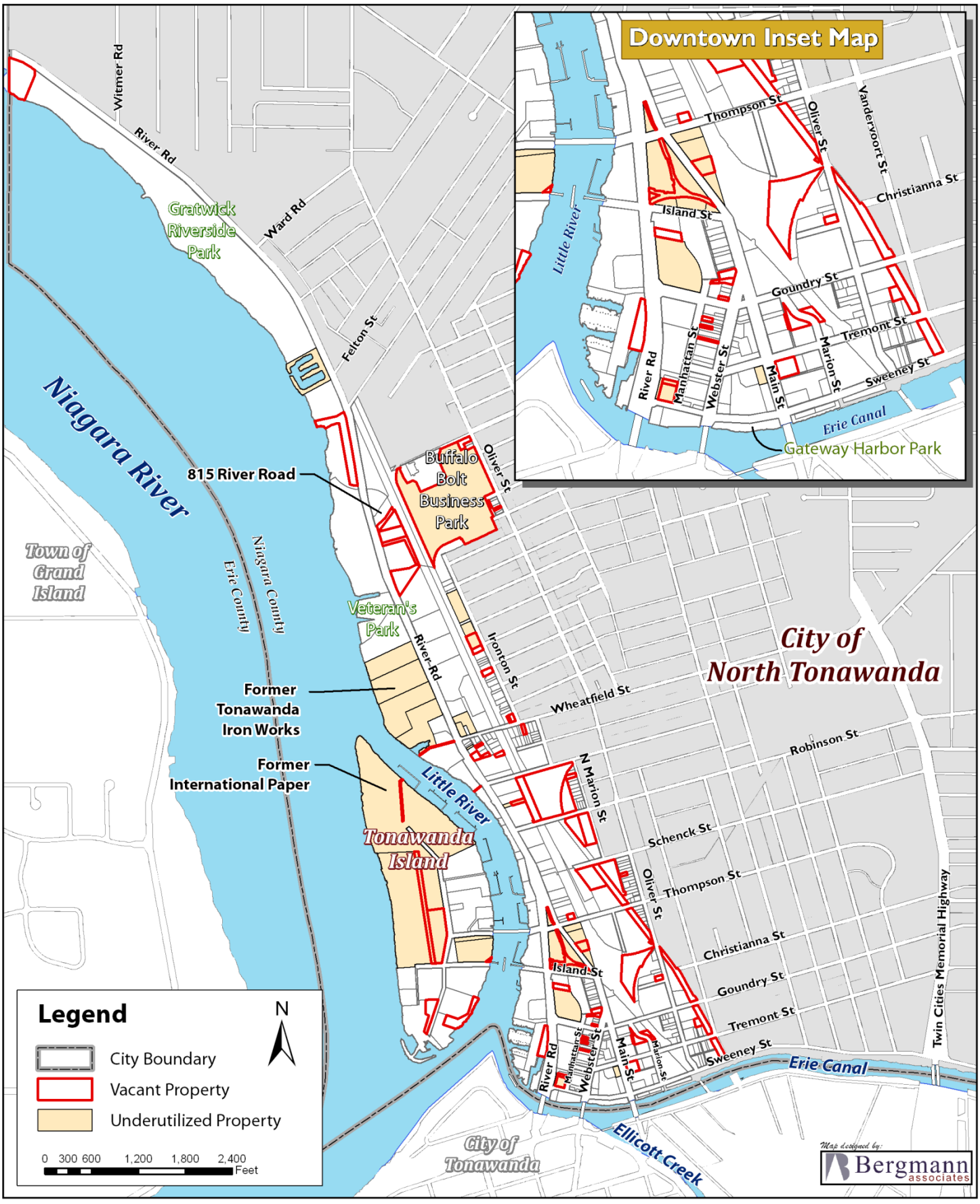
Additional underutilized parcels are found throughout the BOA Study Area. Of particular importance is the current AutoZone property at the corner of River Road and Goundry Street. As of Spring 2010, this property was for sale. This parcel sits at one of the city's most prominent gateways; Goundry Street is the first opportunity for southbound motorist to enter downtown, and is the last exit opportunity for northbound motorists before they leave North Tonawanda. The current visual appeal and use of this property is not worthy of gateway status. Reuse of the existing building should, at a minimum, provide enhanced landscaping, a location for the placement of gateway signage features at the intersection, and better define a buffer between the parking lot and Goundry Street. A complete redevelopment of this site should bring a high quality structure adjacent to the intersection, with a high degree of visual prominence and refined architectural character. Further recommendations for this intersection can be found in the 2010 Downtown Wayfinding Plan.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 8**
**Vacant & Underutilized Sites**



## 3.3.6 Land and Water Ownership

Understanding property ownership and how it relates to future development opportunities along the riverfront and within the BOA is necessary when considering and identifying future projects and land uses. Specific projects may be more easily implemented and directed on lands owned by public entities. However, privately owned properties are equally important. Engaging property owners and working with them throughout the planning process is critical. If private property owners are involved in the process, they are more likely to willingly work toward an agreed upon vision, provide access easements, implement recommended design and site guidelines, sell property to investors interested in redeveloping, or redevelop the property themselves.

***Engaging private property owners in the planning and visioning process is critical to realizing the long-term success and revitalization of the BOA.***

The City can help direct future development on private and publicly held lands through modifications to land use regulations and the development of design standards. Recommendations to land use regulations in the City will be prepared based on the creation of a final phasing and concept plan for the BOA study area.

### *LAND OWNERSHIP*

Approximately 10 percent of the real property parcels within the BOA are under public ownership. A total of seven public entities own 42 parcels within the BOA, as shown in Table 11 and depicted on Map 9. The City of North Tonawanda is the largest public land holder both by number of parcels and total acreage. The City owns several vacant and/or underutilized properties, including the Buffalo Bolt Business Park, lands adjacent to 815 River Road, the former fire training facility on Tonawanda Island, and the marina facility adjacent to Gratwick Riverside Park. Public ownership of these parcels can potentially expedite redevelopment and reinvestment, while providing an enhanced level of public control over final development scenarios.

***Table 11: Ownership by Public Entity***

| Public Entity | Parcels | Total AV | Acres |
|---|---|---|---|
| **City of North Tonawanda** | 29 | 3,224,400 | 106.2 |
| **City of Lockport Water Authority** | 1 | 384,747 | 0.7 |
| **Niagara County** | 2 | 1,386,300 | 6.9 |
| **Niagara County IDA** | 4 | 2,745,000 | 9.7 |
| **Niagara Frontier Transp. Authority** | 3 | 47,000 | 2.2 |
| **State of New York** | 2 | 43,200 | 1.0 |
| **United States Postal Service** | 1 | 383,000 | 0.8 |
| **Totals** | **42** | **$8,213,647** | **127.5** |

*AV= Assessed Value*
*Source: Niagara County Real Property Tax Service*

### *UNDERWATER OWNERSHIP*

As defined in NYS Public Lands Law Article 6, underwater lands are those below the mean high water mark. In North Tonawanda, this includes land below the high water mark in the Niagara River and Erie Canal. The owner of property on adjacent "dry land" is referred to as the upland property owner.

Generally speaking, New York State owns the land under all navigable lakes, streams, and rivers, including the Niagara River, Little River, and Erie Canal. The State does sell, give, transfer and alienate certain parcels of the land beneath these waterbodies

as a means to help upland property owners install wharfs, docks, or piers.

There are two State entities that control lands underwater in North Tonawanda. The NYS Canal Corporation has control of the underwater lands beneath the Erie Canal / Tonawanda Creek. At the Webster Street overpass the jurisdiction changes to the New York State Office of General Services (OGS), following the Canal Corporation's Blue Line that bounds lands under its control.

According to OGS, there are no underwater land grants along the Niagara River or Erie Canal.

***Inactive Swing Bridges***

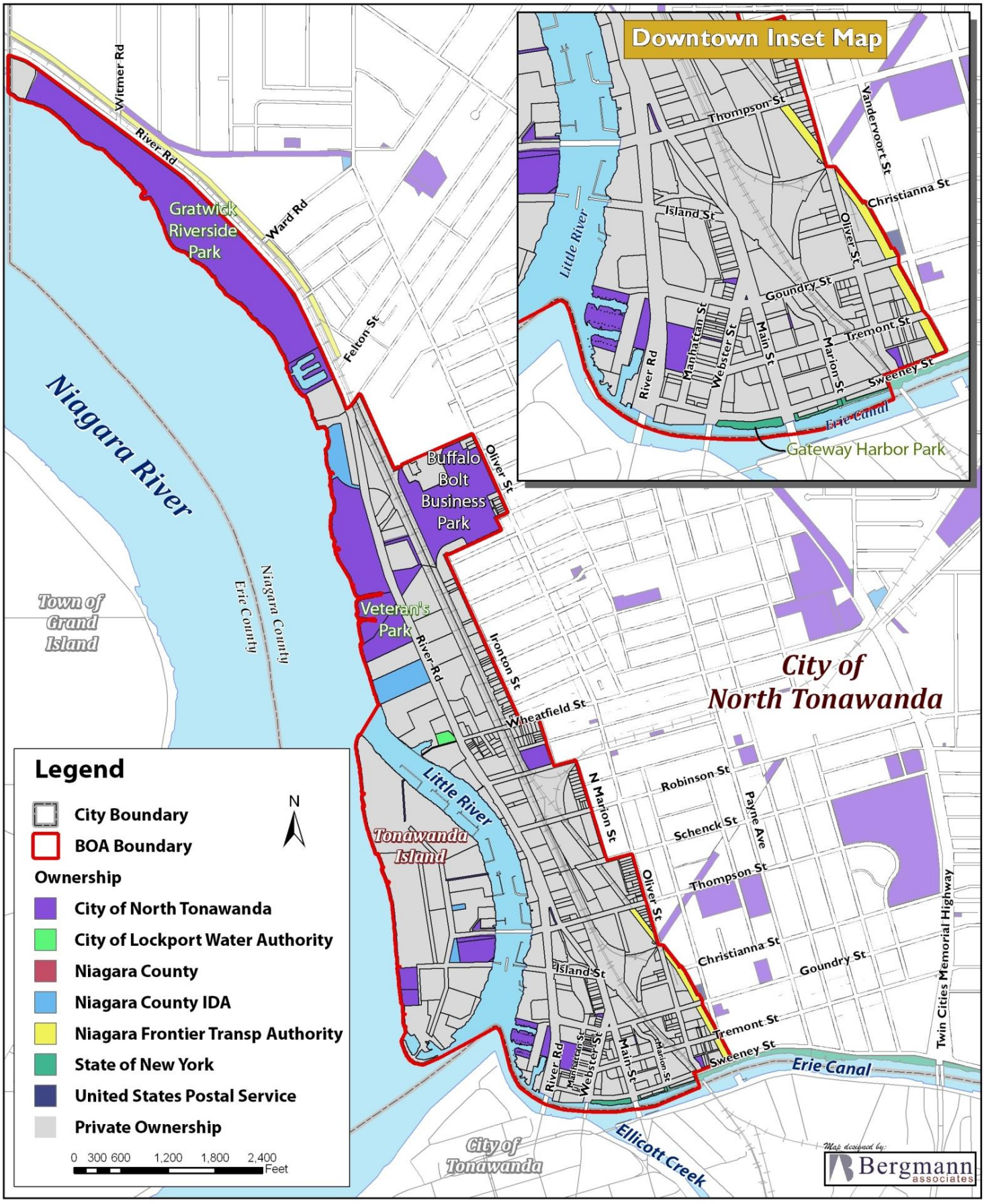
There are two abandoned swing bridges within the Study Area. According to the City's most recent assessment information, control and ownership of the swing bridge within the Little River has been in limbo since 1989. The former owner was a corporation which has since dissolved, with the dilapidated swing bridge assets not passed to a subsequent owner. The City of North Tonawanda has avoided taking ownership due to potential liabilities associated with the failing structure. The second swing bridge located near the mouth of Tonawanda Creek is believed to be under private ownership.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

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## MAP 9
### Land Ownership



## 3.3.7 Parks and Green Infrastructure

Parks and green infrastructure within the North Tonawanda BOA include public parks, trails, sidewalks, street amenities, boater facilities and public access to the waterfront. These recreational and non-motorized transportation resources are an important indicator of quality of life within a community. In North Tonawanda, the location of these resources along the waterfronts provides recreational and entertainment benefits for residents, but should also be used to spur associated economic development potential through a more defined tourism approach.

### *PARK FACILITIES*

There is no shortage of park facilities along the city's waterfront or within the BOA. Rather than focus on creating more park facilities, the City should concentrate efforts on the enhancement and improvement of existing facilities to better meet the needs of users and create a unique experience for visitors. Existing park facilities are indicated on Map 10 and described below.

#### *Gratwick Riverside Park, River Road*

Connected to Veteran's Park via a riverfront trail, the park is home to a picnic pavilion, public boat launch, and an accessible fishing pier will be completed in 2010. The Park was incorporated into the Niagara Greenway Plan as a gateway and primary destination element in the Buffalo-Niagara Region. A master plan for the development of the park was completed in 2009 in an effort to identify a phased approach for creating a regional destination. The master plan includes passive and active recreation areas, along with environmental and habitat enhancements for interpretive and educational components. Several structures are proposed to add functionality, including a performance shell, a multi-story community meeting facility, and smaller shelters for daily rental.



*A conceptual rendering of a future fishing pier at Gratwick Riverside Park.*

The City of North Tonawanda recently attained full ownership of the property from Niagara Mohawk after the completion of remediation. Funding for master plan implementation will be sought from numerous sources, including the Niagara Greenway Commission, which is the recipient of pass-through funding from the New York Power Authority for the implementation of the Niagara Greenway Plan.

#### *Veteran's Park (Fisherman's Park), River Road*

Located along the Niagara River, this City Park offers three pavilions, a playground, public restrooms and World War II monuments to the U.S. Navy Seabees and the U.S. Marines. Anglers enjoy the Park's smaller shelter along the waterfront, where shoreline improvements provide access to deeper water for fishing. The park also includes two former shipping slips which have collected extensive vegetation, silt and debris over time. The dredging of these slips would provide additional fish breeding habitat. Improved landscaping and signage at the park entrance and along River Road would enhance the appearance from the surrounding community, as well as the sense of enclosure when inside the park. Areas of additional landscaping with earthwork could provide small and intimate spaces in contrast to the park's currently open feeling.

***Gateway Harbor Park***

This harbor along the Erie Canal functions as the location for the Canal Fest of the Tonawandas held in July, along with weekly events throughout the summer months. Construction of Gateway Harbor Park was completed in 1999 as one of seven Erie Canal Recreationway Harbors, serving as the present day terminus of the Erie Canal. The North Tonawanda side of the harbor includes docking facilities, power and water, a centralized covered pavilion, and is within walking distance to downtown North Tonawanda. Future projects within Gateway Harbor include additional power and water services, new sanitary pump-out facilities, an extension of docking facilities east of the Main Street bridge, and a harbormaster house with comfort facilities.



*Docking facilities and the waterfront promenade at Gateway Harbor.*

***Heritage Park, Between Lincoln and Oliver Streets***

This simple, passive park begins south of Thompson Street and connects Oliver Street and the BOA boundary to the Herschell Carrousel Museum and Felton Field. The linear park offers benches for residents and visitors, and serves as an example of a rail trail that can be emulated throughout the BOA and adjacent areas to improve pedestrian connectivity.

***Charles R. Fleishman Park***

Charles R. Fleischman Park is formed by the intersections of Main, Webster and Goundry Streets, and is bounded on all sides by roadway. Access to this park is accommodated by crosswalks, and the center of the park includes planting beds and a brick paver walkway that terminates at a flag pole. The surrounding traffic pattern is complicated, with significant areas of pavement and vehicular movements making access to this space difficult. However, this park is located at a primary gateway to downtown; identifying ways to improve the use of the park, access, and its relationship to downtown is considered in subsequent portions of the BOA.

***PUBLIC & PRIVATE ACCESS TO WATERFRONT***

***There are an abundance of park, recreation, entertainment and water-based facilities located within the BOA. Focus should take place on enhancing the utility and appearance of these existing facilities and creating a unique visitor experience.***

Situated along the Niagara River and Little River, the BOA enjoys a significant number of marinas, docking facilities and boat launches. The majority of this infrastructure is located along the Little River channel between the mainland and Tonawanda Island.

There are approximately 14 public and private marina facilities located within the BOA with space for over 700 boats, along with nine public and private launching sites. Private marina facilities within the Little River include the East Pier Marina, Bow and Stern Marina, Smith Boys Marina, the Niagara River Yacht Club, Winfield Marina, and the Island Street Boat Yard. Extensive permanent docking facilities have been constructed within the Little River, taking advantage of this narrow, yet protected natural harbor. The existing Durkee Bridge and the

abandoned swing bridge are existing impediments to navigation, limiting the ability of tall and/or wide boats to traverse the entire channel.

Publicly-owned marina sites include active slips at Gateway Harbor and inactive, yet potentially reusable, slips at the former Niagara Yacht Club on River Road. A public boat launch site is located at Gratwick Riverside Park.



*The existing railroad crossing on Ward Road does not accommodate pedestrians or bicyclists.*

***Pedestrian Crossings and Access***

The primary obstacle to accessing the waterfront for pedestrians and cyclists is the River Road corridor, which is a four-lane highway with significant traffic flows and speed limits between 30 and 40 mph. Crossing River Road can be hazardous due to inferior or absent crosswalks, missing sidewalks, and the lack of pedestrian signalized intersections.

Another obstacle to access is the CSX railroad line which runs parallel and east of River Road, also dividing residential neighborhoods from the waterfront. Only six railroad crossings exist in a roughly three-mile span (See Map 10) north of Goundry Street. Underpasses exist downtown at Sweeney, Tremont, and Goundry, Streets, which allow for uninterrupted pedestrian and vehicle flows in the east-west direction. However, the remainder of the BOA and City must navigate at-grade crossings spaced significantly apart.

For example, there are no crossings between Wheatfield and Felton Streets, a distance of nearly one mile. Between the northern most underpass at Goundry Street and the City boundary with the Town of Wheatfield there are only six opportunities to cross the railroad during a three mile span.



*Crossing River Road on foot or by bicycle can be a daunting and dangerous task.*

The infrequent crossings result in circuitous routes and longer travel times for pedestrians and cyclists to access the trail and waterfront parks, making them isolated and not well integrated into the city.

Some parks, however, have good pedestrian accessibility and connectivity. Gateway Harbor Park has the advantage of being close to downtown and is easily accessible by foot or bike. Heritage Park and Charles Fleishman Park are both centrally located within the BOA and surrounding residential neighborhoods. However, the adjacent transportation infrastructure continues to limit accessibility and use of these facilities.

## *PEDESTRIAN & BICYCLE INFRASTRUCTURE*

There are no official bike lanes in the city, although River Road is designated by the state as Bike Route 5, connecting to the City of Niagara Falls. However, a newly constructed multi-use path connects Gratwick Riverside Park south to Goundry Street along the west side of River Road. This path is mostly contiguous, with some sporadic areas of conflict with entry drives and parking lots. An additional small section of multi-use path begins at Oliver Street along the boundary of the BOA and extends east along the canal to Payne Avenue.

Pedestrians in North Tonawanda and the BOA are served by an extensive sidewalk network which exists on the majority of City streets, though notable exceptions include the east side of River Road and all of Tonawanda Island. Pedestrian access to the waterfront within the BOA project boundary is minimal. Areas of accessibility can be found in the public parks, yet formalized access via piers and places for pedestrians to walk into the water are limited. The following provides a more in depth description of bicycle and pedestrian infrastructure within the BOA.

### *Multi-Use Trail*

A recently constructed multi-use path runs along the west side of River Road, which begins at Gratwick Park and continues south along River Road. The trail is paved with asphalt and covers a width of approximately ten feet. It is separated from River Road by a grass buffer approximately four feet in width. The trail connects a regional bicycle route that runs from the Riverwalk in the City of Buffalo to the City of Niagara Falls, as well as a regional bicycle network that is being developed by the Greater Buffalo-Niagara Regional Transportation Council. In addition, River Road is designated as part of New York State Bicycle Route #5, which runs east-west along the Erie Canal. The trail currently fails to complete these connections, however, because it dead-ends at Goundry Street. The trail also lacks adequate identification and wayfinding signage to place it within the regional context.

The City has expressed interest in continuing the River Road multi-use trail from Goundry Street south under the River Road Bridge and continuing along Sweeney Street to Gateway Harbor Park. Ownership issues currently prevent formalized access, making it worthwhile to explore alternatives such as directing through-travelers to cross River Road and enter the downtown business district along Goundry Street. Additional signage would assist in the continuation of a trail spur south along River Road into the City of Tonawanda.

The River Road multi-use trail is removed from the waterfront, except at Gratwick Riverside Park, although there are views to the waterfront from various points. The ownership of the properties between the trail and water is primarily private and many of the views to the waterfront are obscured by industrial uses. In addition, River Road itself is an obstacle to accessing the multi-use trail. The substantial traffic on River Road can be intimidating

to pedestrians and cyclists, even with the multi-use trail in place.

A long-range plan for the multi-use trail could explore the option of moving the trail to the waterfront, where possible. This would entail negotiations with landowners as well as the possibility of the City acquiring more waterfront parcels. Routing the trail along the waterfront instead of along River Road would allow pedestrians increased views of the Niagara River, and would separate the trail from vehicular traffic on River Road, affording much greater safety and a more pleasant experience.

### *Other Bicycle Routes*

The City lacks formalized bike lanes and shared route signage. There is a great opportunity for a network of bicycle routes as well as designated bike lanes to safely connect various areas of the City with the waterfront parks and existing multi-use trail.

In addition to the River Road multi-use trail, Oliver Street has potential to act as a connector that would create a network of bicycle routes within the City. The street is more than 40 feet wide with two lanes of traffic and parallel parking on both sides, providing sufficient width to accommodate a bike lane. A bicycle lane on Oliver Street could help increase bicycle safety as cyclists travel from residential neighborhoods to the streets that cross the railroad line and lead to the waterfront and multi-use trail. Figure 8 shows the relationship of the existing multi-use trail with a future potential bicycle network.

### *Sidewalks*

Sidewalks in adjacent residential neighborhoods abruptly end at most crossings of the railroad line, including those at Thompson, Robinson, Wheatfield, Felton, Ward and Witmer Streets. Sidewalk access along River Road is provided solely along the east side of the corridor, and is at times sporadic with disconnected areas and a sudden terminus across from Veteran's Park. Sidewalks in the downtown business district core are generally adequate, with the largest concentration found along Oliver, Goundry, Tremont, Sweeney, Main, and Webster Streets.

### *Crossings*

Within the BOA, the intersections of the six streets that cross River Road and the CSX railroad tracks are inadequate for pedestrians and cyclists. In nearly all instances, the pedestrian crossing zone is continuous from the east side of the railroad tracks through the west side of River Road. Throughout the BOA, this segment of the cross-streets is extremely pedestrian and bicyclist unfriendly, and includes Goundry, Thompson, Robinson, Wheatfield, Felton, Ward, and Witmer Streets. Well marked crosswalks and pedestrian crossing signals are much needed at these intersections for pedestrian and cyclist safety. Planted medians and pedestrian refuge islands would further facilitate safety at intersections along River Road, while signaling to motorists that they are entering into a populated area.

Other intersections in the downtown area, such as at Goundry/Webster Streets and Goundry/Main Streets, are less heavily trafficked, yet could benefit from improved crosswalk markings and other attempts to calm traffic speeds as motorists travel through downtown.

## *GREEN INFRASTRUCTURE*

### *Street Trees/Plantings*

Street trees and plantings are an important quality of life element in pedestrian-friendly cities, and a major green infrastructure component. Trees and plantings add seasonal character and variety; help define the structure of streets and parks; provide shade and visual buffering; uptake storm water; and improve air quality by absorbing pollution and releasing oxygen. The City of North Tonawanda has many streets lined with impressive tree canopy. However, within the

BOA street trees are generally absent; this is most notable along streets connecting residential neighborhoods and along River Road.

Street tree representation in the downtown business district is sporadic - streets such as Webster and Tremont are more or less lined with trees, while Manhattan and Main Street have very few. The addition of street trees to the downtown core, especially along River Road, can begin to change the current industrial character of these corridors to a more pedestrian-oriented and aesthetically pleasing environment.

Trees and plantings are a critical component of the City's green infrastructure and can reduce the needs for storm water storage and conveyance through the use of bioretention areas. In addition, the presence of quality mature trees can have discernable positive impacts on real estate prices, while the cooling provided by their shade can reduce energy consumption in adjacent buildings. North Tonawanda should develop an enhanced tree planting strategy to improve the quality of life and redevelopment potential within the BOA.

***Vacant or Open Green Spaces***

There are numerous vacant or underutilized spaces within the BOA study area, many of which are currently available for redevelopment. For instance, Tonawanda Island has significant resources of underutilized land which may hold the potential for mixed use development, including residential units. In addition to these development areas, some underutilized lots can become open and green spaces available for public use. For example, the northern tip of the island is already park-like with open spaces and groves of trees. Portions of this area should be retained post redevelopment for public access, consisting of minimal amenities such as benches, a trail and bike path, and potentially shoreline restoration, habitat creation and environmental remediation activities that provide an attractive enhancement for residents. These open spaces can also double as part of the island's green infrastructure by treating and recharging storm water runoff and cleansing the air with groves of additional trees.

***Thompson, Main, Island Streets Gateway***

The multi-use trail, the Durkee Bridge to Tonawanda Island, River Road and Main Street all converge at a nodal intersection that creates a roughly trapezoidal shape (See Map 11). The property is available and has great potential to function as a primary gateway for downtown, as well as a trail head and information station. Development of this site ether privately or publicly should incorporate safe crossings for pedestrians and cyclists to River Road from or to the multi-use trail and to downtown and Tonawanda Island. The potential to extend a green linkage from this site east along Thompson Street to Pine Woods Park would provide a central corridor from the interior residential neighborhoods to Tonawanda Island and the City's Niagara River waterfront.

### *Vacant Railroad Lines*

North Tonawanda has a number of vacant and abandoned railroad corridors that have the potential to be turned into multi-use trails, further facilitating the creation of a 'green' transportation network. Heritage Park between Lincoln and Oliver streets is a good example of an abandoned railroad right-of-way redeveloped as public open space. The park's terminus at Oliver Street marks a convergence with another abandoned rail line that runs between the Erie Canal and Robinson Street. A trail along this path would extend from Gateway Harbor Park and Sweeney Street north through the terminus of Heritage Park and connect with a vacant, former brownfield (Booth Oil) adjacent to the Sommer Street playground. Future development should investigate the feasibility of redeveloping this vacant land as a public green space.

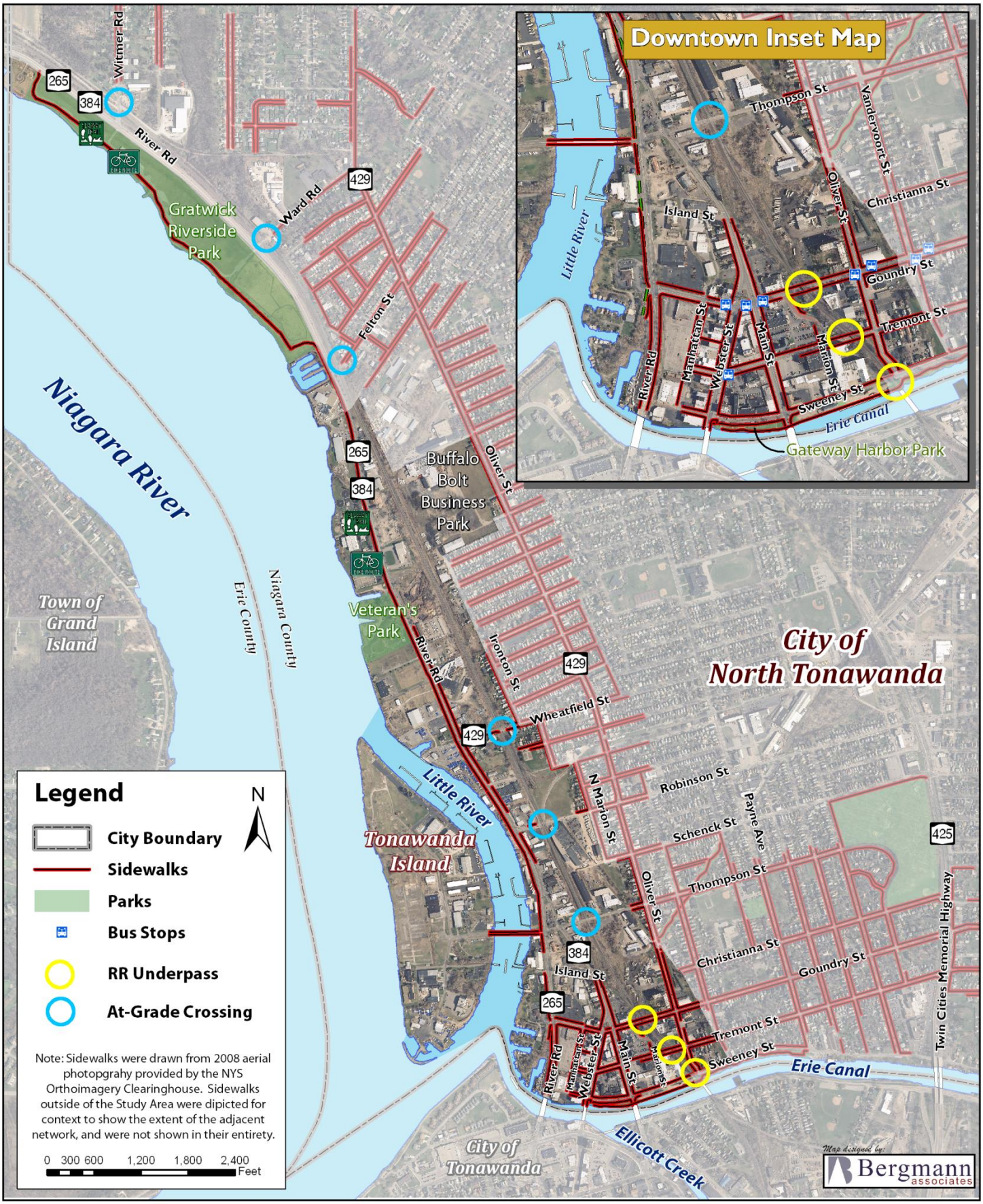
### *SUMMARY OF OPPORTUNITIES*

- Improve intersections for bikes and pedestrians to make stronger connections between residential neighborhoods, the waterfront and the multi-use trail.
- Develop a network of bicycle routes that would connect various areas of the city to the waterfront.
- Provide new and improved sidewalks, planted medians, street trees, well-marked crosswalks and pedestrian traffic signals to enhance pedestrian experience and safety along River Road.
- Utilize Oliver Street as part of a bicycle/pedestrian loop network in conjunction with the River Road multiuse trail and waterfront parks.
- Maintain open space and publicly accessible green spaces on Tonawanda Island with direct access to the waterfront.
- Identify potential vacant railroad infrastructure for use as part of the City's parks, open space and greenway network.
- Redevelop the gateway node at Thompson Street, River Road, and Main Street as a potential privately or publicly owned space to include wayfinding and branding elements.

# North Tonawanda Brownfield Opportunity Area
## Nomination Study

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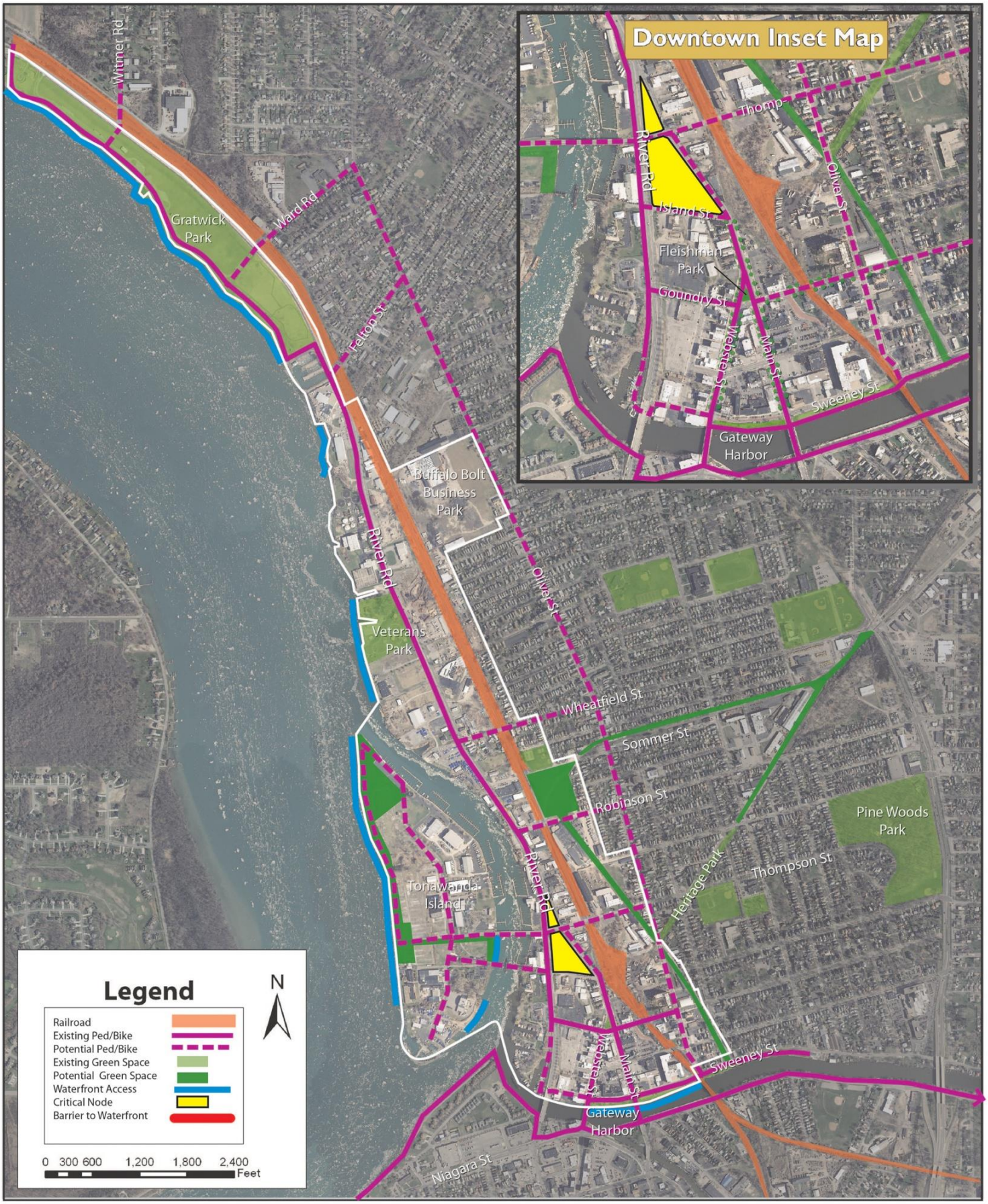
# MAP 10
## Pedestrian Circulation



# I
## Nomination Study

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## Potential Bicycle & Pedestrian System



## 3.3.8 Historic and Cultural Resources

The city's cultural and industrial heritage forms a complementary foundation for tourism development, and plays an important role in solidifying the identity of the North Tonawanda community. Where possible, the cultural and historical resources should be leveraged as part of the City's marketing and promotion. Cultural and historic resources can be seen on Map 12.

### *PROMOTING OUR RESOURCES*

The marketing of existing resources is already happening, with the City actively partnering with Niagara County and local arts and culture groups to prepare marketing and promotional materials that highlight the resources in the Niagara region.

The Arts & Culture Niagara brochure recognizes five historical and cultural destinations in the city, including Carnegie Arts Center, Carrousel Factory Museum, Riviera Theatre, History Museum and Lumber City History Center, and Starry Night Theatre.

***North Tonawanda must build on its historic and cultural resources to foster community pride and attract visitation and investment from both outside and within.***

Other promotional materials produced by individual sites, the City, and Niagara County also highlight these resources. However, creating itineraries and themed tours, hosting more special events, and marketing a multi-faceted experience for visitors could help promote greater visitation to these sites and other destinations. Linking these individual locations, and future developed sites within the BOA, will be an important element of its long-term success. A plan for marketing and promoting both these resources, and the BOA as a whole, to residents, visitors, and investors will be comprehensively identified in subsequent phases of the planning process.

### *HISTORIC DISTRICTS*

The City is designated as a Certified Local Government Program (CLG), which recognizes that the City supports and is committed to preservation activities at the local level. The program strengthens local preservation activities by assisting communities with their preservation goals through the development of an action plan. The CLG program is a nationwide initiative that directly links a community's preservation goals to state and federal preservation programs. Each State Historic Preservation Office (SHPO) administers the program through a variety of services designed to help communities protect, preserve, and celebrate their historic resources. In New York State, the SHPO is within the NYS Office of Parks, Recreation and Historic Preservation.

As part of North Tonawanda's CLG program, an historic district has been designated that includes downtown Manhattan, Webster and Main Streets, extending to the intersection of Main Street and River Road, and including Oliver Street from the Canal to Goundry Street. The City is currently investigating the expansion of the boundary into the historic neighborhoods to the east from Pinewoods Park and Christiana Street south to Sweeney Street.

Historic district walking tours, whether in a brochure or narrated format, can serve as an attraction for visitors interested in history and architecture. Designated districts are often safeguarded by design standards, and tend to be well maintained with a recognizable character associated with their architecture. These neighborhoods can also become a source of local pride and can result in increased

opportunities for investment and enhancement of the public realm.

### *HISTORIC RESOURCES*

There are four National Register sites located within North Tonawanda, one of which is located within the BOA and the others located just outside the project boundaries. There are also a number of additional historic resources of local significance that are not listed on the National Register. Many of these are included within the locally designated historic district.

The following is a brief description of resources within and adjacent to Study Area:

**Riviera Theatre (within the BOA)**

Built in 1926, the Riviera Theatre is one of the last remaining movie palaces in New York State that dates to the silent movie era, and is an excellent example of neighborhood theaters of the early 20th Century. The theater still houses an original Wurlitzer organ, and seats over 1,100 patrons. The Riviera Theatre is the anchor of Webster Street, and provides significant economic and historic benefits to North Tonawanda's downtown character. Regularly scheduled monthly organ concerts are complemented by a full regiment of concerts, movies, and live performances of opera and theater throughout the year.




**Post Office (directly adjacent to the BOA)**

The North Tonawanda post office, located at the corner of Goundry and Oliver Streets, is an excellent example of public building architecture dating from the early 20th Century. Constructed from 1912 to 1914, the building was one of the last Post Offices to be individually designed, with standardization taking place in 1915. The building is architecturally significant, and plays an important role as an anchor of the Oliver Street corridor.

**Allan Herschell Carrousel Museum (adjacent to BOA)**

The Herschell Museum complex is an architecturally and historically significant property constructed between 1910 and 1915. It is believed to be one of two surviving manufacturing complexes which produced carved wooden carousels. This factory museum is a rare surviving link to the late 19th and early 20th century periods in which carousels and amusement parks were an important part of American culture. The museum currently functions as a significant educational and historical destination within the region.




**Carnegie Art Center (outside the BOA)**

Constructed in 1903 with funds provided by industrialist Andrew Carnegie's foundation, the building is a distinctive example of an early 20th century Carnegie Library, and a sophisticated example of civic architecture in the Neoclassical Style. The building ceased to function as a library in 1976, and has since been converted into the Carnegie Art Center operated by the Tonawanda's Council on the



Arts. This building functions as a multi-disciplinary arts space and offers exhibitions of contemporary art, children's arts, dance and theater classes, and professional workshops for artists and organizations. The Art Center is a significant destination within the city for residents and visitors, and is located within a few blocks of both downtown and the Erie Canal.

**Former Railroad Switching Tower (in BOA)**

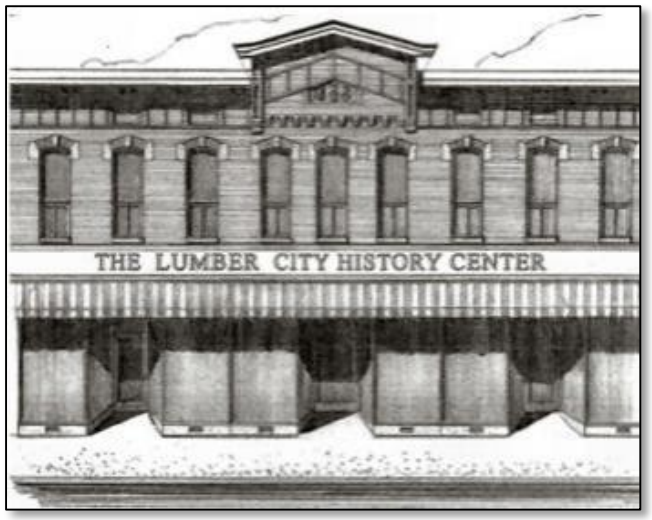
Located on Oliver Street opposite the Linear Park that leads to the Allan Herschell Carrousel Museum, this structure is one of a few remaining switching towers in New York State. Originally constructed to act as a lookout tower for the intersection of two railroads, the structure is now owned and managed by the Niagara Frontier Chapter of the National Railway Historical Society. The Society has plans for restoring the structure to permit interpretive exhibits. The tower is currently boarded up, yet receives regular maintenance from Society members.

***CULTURAL RESOURCES AND FACILITIES***

Many of North Tonawanda's historic resources, with the exception of the post office, also function as primary cultural resources within the city.

**North Tonawanda History Museum**

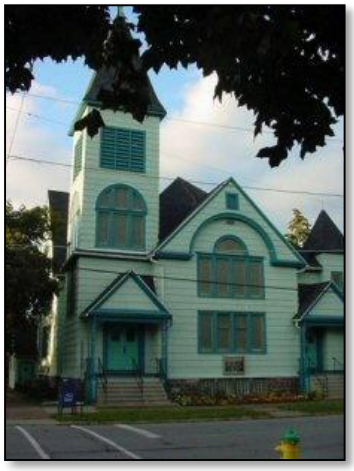
The North Tonawanda History Museum recently closed on its purchase of 54 Webster Street, in the heart of downtown North Tonawanda and in the core of the BOA project boundary. This building will house the Lumber City History Center and a welcome center for visitors, and will be visible and easily accessible from the canal waterfront. This facility is expected to open in 2013. The Lumber City History Center is being developed as part of a resident-led effort to enhance the North Tonawanda History Museum. The history center is planned to provide educational, interpretive, and interactive exhibits on the history of North Tonawanda. Fund raising is ongoing for history center improvements, which will include an event hall and several exhibits that simulate life in historic North Tonawanda.




*Conceptual rendering of future Lumber City History Center on Webster Street.*

**Ghostlight Theater**

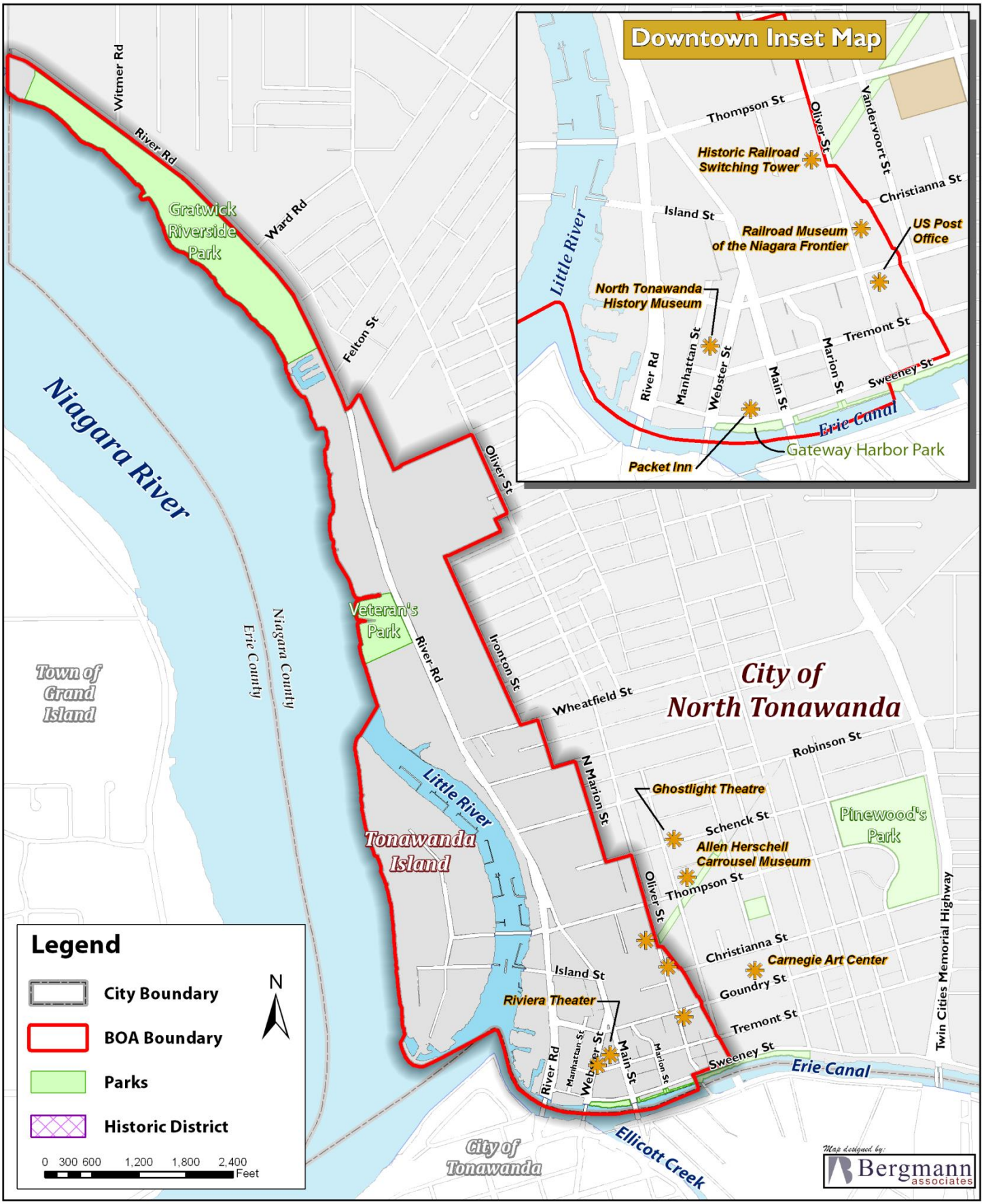
The Ghostlight Theater is host to the Ghostlight Theater Company, which is a celebrated arts and humanities organization founded in 1972. The theater is managed and operated by Starry Night Theater, Inc, a non-profit arts and education organization with the mission of protecting and preserving the Ghostlight Theatre Company and the Ghostlight Theatre. The Ghostlight is host to drama classes and numerous productions of on-stage theater and musicals. The theater is located just outside of the BOA on Schenck Street.



# North Tonawanda Brownfield Opportunity Area
## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 12**
**Historic and Cultural Resources**



## 3.3.9 Transportation Systems

The city's transportation infrastructure has played a significant role in guiding the growth and development of the community. As a former logistical hub for shipping, the historic network of rails, roads and waterways has greatly impacted land use and community accessibility, particularly within the BOA. Turning the challenges posed by current and historic transportation infrastructure into opportunities is a significant goal in community revitalization efforts.

***The BOA study area offers a number of modal options, including pedestrian, bicycle, rail, transit, water, and vehicular.***

***ROADWAYS***

The City maintains a well organized road network, with a traditional grid pattern street system that is compatible with its urban character, as shown on Map 13.

North Tonawanda's road network is owned and maintained at two municipal levels: State and City. State Roads include the Twin Cities Memorial Highway, Main Street and River Road. These State-owned and maintained streets provide primarily north-south connectivity. In most instances, travel into and out of the city follows these State-owned roadways. Access to downtown and the BOA project area primarily comes from River Road, with additional accessibility provided by the Webster Street and Main Street bridges that link downtown North Tonawanda with the Town of Tonawanda across the Erie Canal.

City streets carry all other vehicular traffic, providing arterial, collector and local level roadways that link together neighborhoods, commercial centers, municipal services and the larger transportation context. Oliver Street is the primary north-south City street linking the BOA to the remainder of city neighborhoods.

Within the BOA, River Road is the dominant transportation corridor. Yet, it also physically and visually overpowers its surroundings. The roadway is extremely wide, with a five-lane cross section and full width shoulders. Potential enhancements include landscaping, aesthetic and pedestrian-scaled lighting, and street trees. Improvements should seek to narrow the perceived width of the corridor and promote traffic calming. Enhancements should also be made to the corridor's wayfinding system to improve motorist recognition of destination elements within the BOA and adjacent areas.

***TRAFFIC VOLUME***

Traffic volumes provide an indicator for both safety and economic potential. While larger and faster traffic flows are a potential impediment to pedestrian connectivity and safety, these same factors are considered a positive when siting commercial and retail development. Identifying a balance between safety and visibility is key to making land use recommendations within the BOA.

Traffic volumes along critical segments of roadway within the BOA are provided in Table 12, as obtained from the NYS Department of Transportation. Average Annual Daily Traffic (AADT) is the total volume of vehicle traffic of a highway or road for a year divided by 365 days. These figures are typically estimated through traffic counts conducted over the course of several days and extrapolated.

***Table 12: Traffic Volumes for Select Segments***

| Roadway Segment | AADT |
|---|---|
| River Road from Main to Wheatfield Street | 19,800 |
| River Road at south City/County Line | 17,100 |
| River Road from Goundry to Main | 16,300 |
| River Road north of Wheatfield Street | 15,000 |
| Webster Street Bridge at canal | 6,500 |
| Main Street Bridge at canal | 4,500 |
| Tonawanda Island (Durkee) Bridge | 1,600 |

Source: New York State Department of Transportation.

River Road experiences a high level of traffic, serving as one of the primary entry and exit points between North Tonawanda and communities to the north and south. Specific recommendations for the corridor will be developed in subsequent portions of the BOA study in an effort to both capitalize on the traffic volumes and to balance the vision of the community to make River Road a more aesthetically pleasing and pedestrian safe environment.

***The City should continue to work with the owners of abandoned and former rail infrastructure to identify opportunities for connective public greenspaces and linear trails.***

### *RAIL SERVICE*

Not too long ago, North Tonawanda was a central rail hub for shipping lumber and steel. While the industries that supported this activity have diminished, relocated or closed completely, much of the rail infrastructure remains intact. The active infrastructure travels from south to north along the western side of the city, including much of the BOA study area. Inactive rail infrastructure remains within the BOA, and rail corridors, rights-of-way, easements, and bridges limit connectivity and the assembly of larger parcels for redevelopment.

Areas particularly impacted by rail infrastructure include the lands between Oliver Street and Main Street/River Road north of Goundry Street. The land use pattern in this area is directly tied to the existing infrastructure and the embankment for the railroad. Revitalization strategies for areas such as this will need to be cognizant of limitations imposed and opportunities provided by the proximity of active rail service.

***The City should investigate opportunities to enhance the level of connectivity with surrounding communities via passenger rail and ferry services.***

Active rail service within the BOA is limited to a few commercial and industrial clients which are currently located on the west side of Oliver Street south of Wheatfield Street. Rail service to Tonawanda Island ceased in February 1996 due to an emergency order from the Federal Railroad Administration, which ordered the discontinuation of traffic across the Little River railroad swing bridge due to structural failure. Passenger service within North Tonawanda ceased in 1960, although Amtrak utilizes rails through North Tonawanda for service between Buffalo and Niagara Falls.

A second inactive swing bridge is located within Tonawanda Creek. This bridge has not been utilized for rail traffic since the construction of the River Road bridge and highway corridor in the 1970s. Both the Little River and Tonawanda Creek swing bridges limit water usage and navigability.

### *PUBLIC TRANSPORTATION*

The city and BOA are served by the Niagara Frontier Transportation Authority (NFTA). The NFTA maintains five bus routes in North Tonawanda, as well as the Metrolink Shuttle, providing inter-county access between Niagara and Erie counties and the cities of Buffalo, North Tonawanda and Niagara Falls. The five bus routes enter the city from the south along River Road and Webster Street, and from the north along River Road and Ward Road, traversing State roads, City streets and neighborhoods throughout their scheduled routes. The largest hub of transit activity is located within the BOA boundary along Goundry Street, where service for four of the five routes meet. There are no bus stops along River Road, with bus service utilizing Oliver Street as the primary north-south service corridor. The lack of contiguous sidewalks along River Road combined with a lack of bus service creates a severe mobility limitation for individuals without cars. The City should investigate opportunities to provide access to key destinations along River Road, such as Veteran's Park, Gratwick Riverside Park, and primary employment centers.

The City of Niagara Falls is investigating the development of an on-road, rubber-wheeled trolley that will connect major attractions within the city. A potential partnership should be investigated to provide access between North Tonawanda and Niagara Falls. Such an agreement could begin with major seasonal events such as the Canal Fest of the Tonawandas and events at Gratwick Riverside Park.

### *WATER TRANSPORTATION*

North Tonawanda is endowed with a significant amount of water transportation alternatives, located at the confluence of two significant waterways in the Erie Canal and the Niagara River. The majority of these boating alternatives are through private infrastructure, including marinas, launches, repair facilities, and dockage. Although the majority of the BOA's waterfront is along the Niagara River, most visiting boaters are attracted to the Erie Canal.

Nearly all private commercial boating infrastructure is located in the Little River, which offers protection from the Niagara River and access significant land-based services. The largest collection of public facilities is located on the Erie Canal at Gateway Harbor Park. As the western terminus and a major destination along the Erie Canal, North Tonawanda strives to provide ample services for boaters, both local and transient. Gateway Harbor Park is in close proximity to downtown, providing convenient access to boater and tourist services. There are approximately 10 areas to dock watercraft on either permanent or seasonal infrastructure. The majority of these facilities are located in the Little River channel portion of the Niagara River between the mainland and Tonawanda Island.

While there are several sightseeing and excursion tour boat operators in the Buffalo-Niagara region, none are located in North Tonawanda. Given its prominent waterfront location, this is a significant opportunity that should be considered and explored to further enhance the waterfront identity of the City.

#### *Wayfinding*

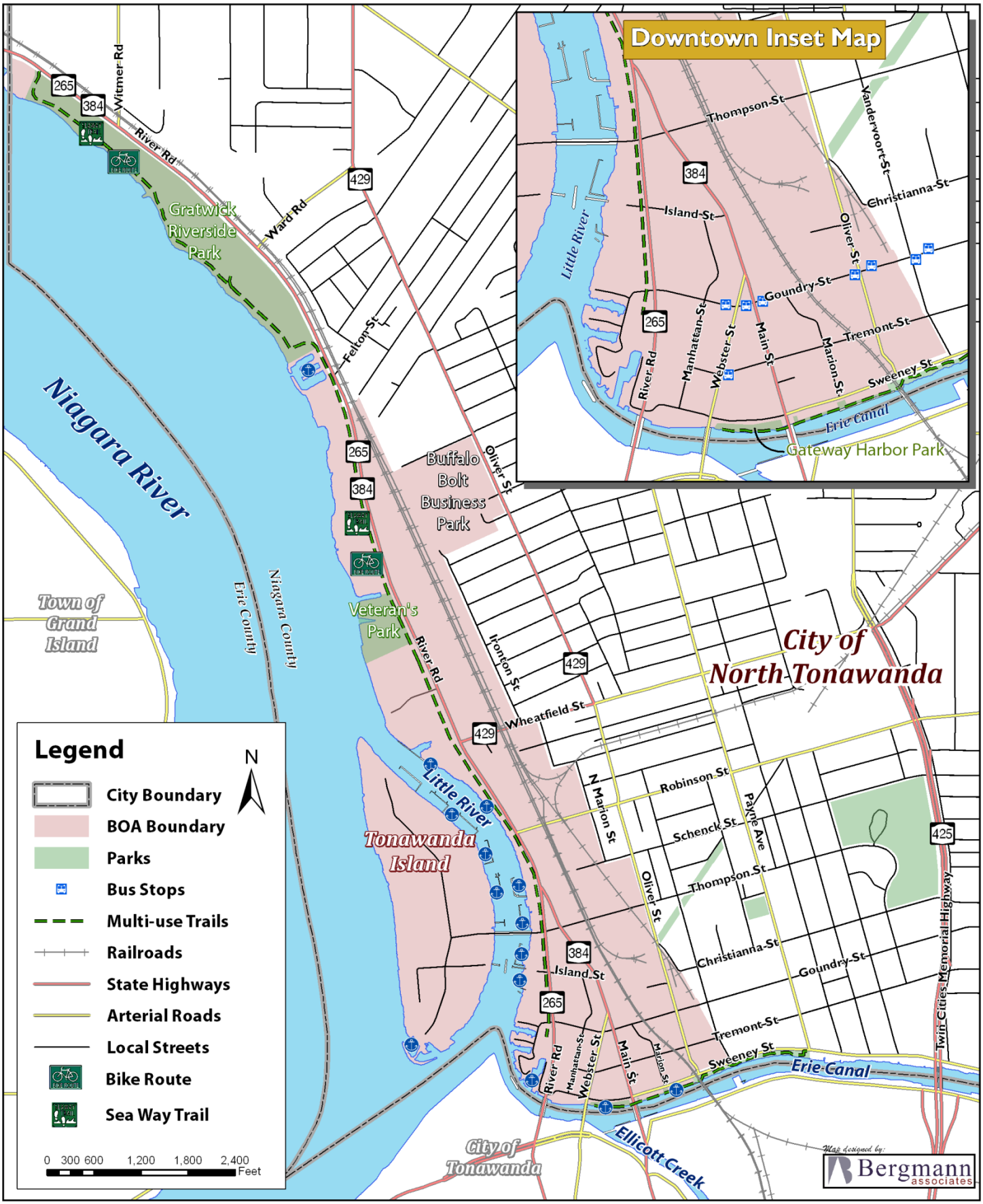
The City is currently undertaking a downtown wayfinding study in conjunction with the BOA. Preliminary recommendations include the development of a series of gateways at critical locations within the City that will orient motorists to key destinations and opportunities. A series of these gateways is proposed along River Road and at primary intersections within downtown. Additional wayfinding components include directional signage, interpretive signage, kiosks, destination markers, and art-infusion zones, where wayfinding and community identity elements are embedded into the landscape with public art, or into the streetscape through symbology.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

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**MAP 13**
**Transportation System**



## 3.3.10 Public Infrastructure

The ability of existing infrastructure to support additional demand is an important aspect to consider during community revitalization efforts. Upgrades to these infrastructure components is time consuming and very expensive. Prior knowledge of service and capacity limitations will help determine development phasing and financing strategies.

### *SANITARY SEWER AND WATER SUPPLY*

Nearly the entire BOA is serviced with public sewer and water service, with the exception of the northern part of the BOA along River Road at Gratwick Riverside Park. Large utility mains are located on the east side of the railroad along Riverview Avenue and service adjacent residential areas. However, service has not been extended west of River Road.

### *WATER AND WASTE WATER TREATMENT CAPACITY*

The water treatment facility is located on Tonawanda Island and draws its water from the Niagara River. This plant has a capacity of 12 million gallons per day (MGD), yet the average draw in 2008 was 3.6 MGD and the maximum draw was 5.3 MGD. Based on this data, the facility has significant remaining capacity for potable water treatment.

The City's existing waste water treatment plant is located along the Niagara River on River Road. This plant has a purported capacity of 14 MGD. Based upon the water supply figures, the waste water treatment plant should also have significant available capacity for treating waste.

## 3.3.11 Natural Resources

The natural characteristics of a community have a critical impact on overall land use patterns and on the choice between conservation and development alternatives. In some cases, these natural characteristics are limitations that will create impracticalities to development because of associated costs of land preparation, improvements, or construction. In other cases, critical and unique areas would be forever lost if development were to proceed unencumbered. In these instances, efforts must be made to protect valuable natural resources which still exist. Development can also highlight or enhance the utilization of natural resources, resulting in the best design alternative for the community and environment.

***The natural characteristics of a community can have an important impact on overall development patterns and land use decisions. Effort should be made to protect the valuable natural resources which still exist.***

Like historic and cultural resources, natural resources can serve as a basis for education and interpretation, attracting both locals and visitors to the study area. As the BOA is further developed, opportunities for protection, education, and interpretation of unique resources will be thoroughly explored. Future improvements within Gratwick Riverside Park, for example, will include a large environmental education component that provides self-guided interpretive tours of the Niagara River Watefront, locally-enhanced habitat, and the remediation of the site as a former brownfield.

Natural resource characteristics, as shown on Map 14, are considered in order to gain a better understanding of existing conditions within the BOA boundary and to identify parcels that may be better suited as development sites or as natural or improved open space.

### *WATERBODIES*

There are several types of waterbodies within the BOA study area, including, streams, creeks, canals and rivers, with each type contributing to the environmental and/or economic health of the community.

#### Watersheds

A watershed is defined as the area of land that drains into a particular water body. The City of North Tonawanda drains into a primary watershed that contains one distinct sub-watershed. The Niagara River (Tonawanda Channel) watershed receives direct and channeled run-off from the northwestern portions of the city and the BOA. The river is also the final outfall for the Tonawanda Creek sub-watershed, which gathers run-off from lands to the south and east, as well as the drainage from Bull Creek. The result is a high concentration level of potential pollutants within the Niagara River, which is an important recreational resource and fishery in the Niagara Region.

#### Erie Canal and Tonawanda Creek

The combined Erie Canal and Tonawanda Creek form the City's southeast boundary. The Canal flows from east to west into the Niagara River, and is a major navigable waterway connecting North Tonawanda with Lockport, Brockport, Rochester and beyond. The Erie Canal functions as both a transport route, a visitor/tourist destination, and a heritage and cultural resource. The many facets and opportunities presented by the Erie Canal should continue to be leveraged for economic development and quality of life improvements.



*The Erie Canal at Gateway Harbor.*

The recent construction of the Gateway Harbor Park at the confluence of the Canal and Ellicott Creek provides dock space for recreational boaters traveling along the canal, and is a direct link between the downtown core and the Erie Canal waterfront. Due to their status as a navigable Water of the United States, the combined Erie Canal and Tonawanda Creek are under the jurisdiction of the Army Corps of Engineers and the United States Coast Guard, in addition to the NYS Canal Corporation.

***Classification as a navigable waterway may provide potential funding for needed channel improvements, such as dredging. Waterside projects within navigable waterways require review and approval by the Army Corps of Engineers and the Coast Guard, which may extend development timelines.***

**Niagara and Little Rivers**

The Niagara River is a major river in the northeastern United States, connecting Lake Erie and Lake Ontario, with the spectacular Niagara Falls in between. The Niagara River flows generally north past the City of North Tonawanda, meandering around Grand Island in what is called the Tonawanda Channel on its east side. The river is a prime navigable waterway connecting the city with points west and east via Lake Erie, the Upper Great Lakes, and the St. Lawrence Seaway. The Welland Canal, accessible via the Welland River to the west in Ontario, Canada, provides a navigable route around Niagara Falls.

Tonawanda Island is located within the Niagara River, with the Little River serving as North Tonawanda's port for small commercial and local/transient recreational watercraft. The Little River channel flows between Tonawanda Island and the mainland, providing a safe harbor for watercraft during times of storm and wind.

Due to their status as a Navigable Water of the United States, the Niagara River and the Little Niagara River fall under the jurisdiction of the Army Corps of Engineers and the United States Coast Guard, in addition to the NYS Office of General Services.

***WATER QUALITY***

The New York State Department of Environmental Conservation (DEC) has implemented several programs to monitor the waters of the state, assess the quality of these waters, conduct research to better define the nature of pollutants, sources and impacts on water quality, and develop management strategies to enhance and protect these waters.

The DEC Division of Water is responsible for the routine monitoring of trends in water quality, and identification of water quality problems. This monitoring effort is coordinated through the several active programs that provide varied findings across the spectrum of water resources. Several assessment and reporting programs are utilized to evaluate monitoring results and report on water quality.

Water quality monitoring and reporting done on both the Niagara River and Tonawanda Creek have found that these water bodies are impaired. This impairment has been well documented through numerous reports, which indicate that the presence of PCBs prevents the consumption of fish from these waters due to the ability for these contaminant to become concentrated within the animals. The water quality impairments to the Niagara River have been determined based upon historic and persistent modifications to habitat. Meanwhile the PCB levels within Tonawanda Creek have been identified as resulting from toxic spills or polluted sediments.

While the NYSDEC declares these water bodies to be impaired for fish consumption, the myriad of other recreational and economic opportunities remain viable options, including power boating, swimming, canoeing, kayaking and sport fishing.

### *FLOOD HAZARD AREAS*

According to mapping developed by the Federal Emergency Management Agency (FEMA), floodplains in the city are located along the Niagara River and the Erie Canal. Several low-lying areas along the eastern banks of the river and northern banks of the canal are located within the 100 year floodplain, the boundaries of which were last updated in 2010.

As seen in Map 13, approximately 40 acres of real property are within the 100 year floodplain, or about nine percent of the BOA project area. Areas most significantly impacted by the 100 year floodplain include the Weatherbest Slip area, eastern shores of Tonawanda Island, and the narrow portions of land between Sweeney Street and the Erie Canal. In addition, all of Tonawanda Island is within the 500-year flood hazard zone, which indicates a 0.2 percent chance of flooding each year.

Development within these designated areas will need to be in accordance with the City's Flood Hazard Area ordinance, which requires additional permitting and approval processes, and enhanced construction methods to ensure the health, safety and welfare of individuals and property within these zones. Additional insurance coverage may also be required by private lenders and the federal government.

### *WETLANDS*

The NYSDEC regulates wetlands that are 12.4 acres (5 hectares) in size or greater. While there has been discussion of lowering the threshold for NYSDEC jurisdiction, no formal policy change has been adopted. Due to the amount of wetlands within the city, the administration should remain attentive to potential changes to NYSDEC jurisdictional determination thresholds for freshwater wetlands.

***While the Niagara River has been determined to be impaired for fish consumption, recreational opportunities remain important and viable options – including power boating, swimming, canoeing, kayaking, and sport fishing.***

Currently, none of the City's identified NYS DEC jurisdictional wetland resources are located within the BOA study area.

The City's 2009 Comprehensive Plan offers a fuller description of wetlands found throughout the city. The federal government claims jurisdiction over any wetland resource that is connected to a Navigable Water of the United States. According to available National Wetlands Inventory (NWI) mapping, there is one small wetland area located adjacent to Veteran's Park within the southern former shipping slip. Improvements to areas designated as NWI wetlands require extensive permitting and approvals by the Army Corp of Engineers to ensure the continued protection of these resources.

### *STEEP SLOPES*

North Tonawanda is situated in the northwestern extents of the Lower Great Lakes Plain, an area of highly productive agricultural land south of the Canadian escarpment, and north of the Appalachian Mountains. The regional landscape that includes North Tonawanda is characterized by gently rolling terrain generally sloping to the west towards the Niagara River. The terrain on which North Tonawanda is situated is extremely flat, with changes in elevation of only 20 to 30 feet across the city.

The banks of the Niagara River and the Erie Canal offer the most significant elevation change, with some slopes approaching 10 to 15 feet. These areas, however, are mostly present in limited areas where no development potential exists, and is therefore not considered a limitation within the BOA. Throughout the Study Area, slopes can generally be categorized as flat, in the 0 to 5 percent range.

### *SOIL CHARACTERISTICS*

According to the Niagara County Soil and Water Conservation District, there are 14 mapped soils units present within the City of North Tonawanda, of which three are primarily located within the BOA boundary. The following is a brief description of the primary mapped soil units found within the BOA:

**Ca=Canandaigua silt loam**

This soil is very deep and very poorly drained. Slopes range from 0 to 2 percent. The parent material consists of silty and clayey glaciolacustrine deposits. Depth to the top of a seasonal high water table is 0 inches. Annual ponding is frequent and available water capacity is high. These area non-hydric soils, which means they do not typically result in the formation of wetlands. This soil category occupies a large majority of the BOA. While no inherent limitations are present for typical construction activities, larger structures requiring significant foundations will need to provide site specific investigations regarding soil conditions.

**RaA = Raynham silt loam**

This soil is very deep and somewhat poorly drained. Slopes range from 0 to 2 percent. The parent material consists of glaciolacustrine, eolian, or old alluvial deposits, comprised mainly of silt and very fine sand. Depth to the top of a seasonal high water table ranges from 6 to 18 inches. Available water capacity is high, and these area non-hydric soils, which means they do not typically result in the formation of wetlands. Development limitations are similar to Canandaigua silt loam.

**Ua = Unsurveyed area**

Soil data not provided these areas, which primarily occur in areas of the urban core of North Tonawanda. It is unclear why the classification for these soils is not Urban Land (Ur); yet the presence of distinct soil types within this area is unlikely due to the great levels of historic development that has take place in these areas.

The poor drainage and shallow water table of the soils found within the BOA complicates development activities, but is not overly limiting. It is not anticipated that soil conditions will restrict development, other than potentially impacting excavation for basements and other subgrade structures.

### *SURFACE GEOLOGY*

An analysis of surface geology was conducted for the BOA because the type and location of underlying geologic materials can have important implications for development. Areas heavy in clay, for example, can prohibit some types of development due to engineering, compaction and permeability properties. Using data provided by the New York State Museum, it was determined that the study area is entirely

comprised of lacustrine silt and clay. While this does not necessarily prohibit development, lacustrine materials increase potential land instability due to their high water storage capacity.

### *GROUNDWATER*

In terms of groundwater, it is important to understand the location and type of aquifers that underlie North Tonawanda. Generally, two types of aquifers exist – confined and unconfined aquifers. Confined aquifers are those groundwater storage areas sandwiched between two layers of impermeable materials (e.g., clay) and impede the flow of water into and out of the aquifer. Unconfined aquifers do not possess an upper confining layer and are instead bounded by the water table. These types of aquifers, especially those located near the surface, are particularly vulnerable to contamination.[1]

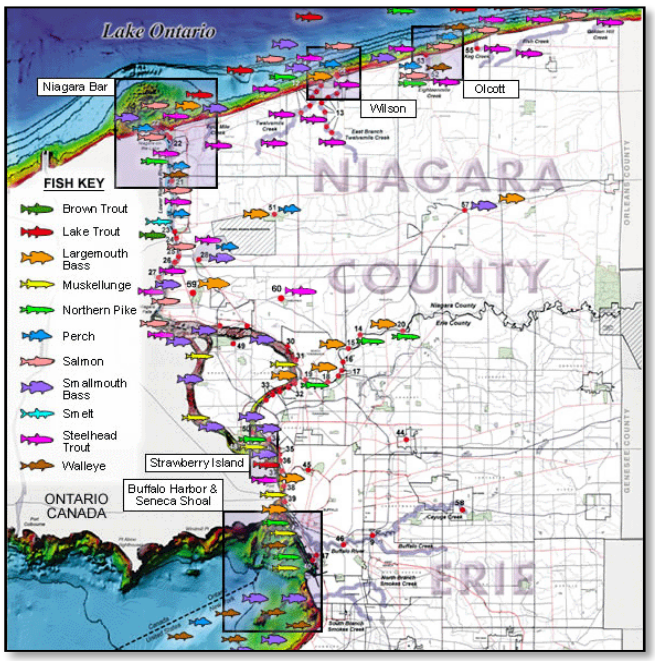
Based on an analysis of data provided by the NYSDEC, there are no aquifers in the BOA study area. The Niagara River serves as the primary potable water source for the City of North Tonawanda and surrounding communities.

### *FISH AND WILDLIFE HABITATS*

Since the North Tonawanda BOA is located within a heavily urbanized area, it lacks significant habitat for wildlife. Based on an analysis of land cover data, less than one percent of the study area comprises forested lands, less than two percent grass or shrub lands, and less than two percent wetland.

Given the limited amount of potential habitat, as well as the BOA's urban location, it is likely that only common species of urban wildlife (e.g., raccoons, opossums, crows) inhabit the study area.

The Niagara River provides cold water habitat for trout, bass, sturgeon, musky, walleye, pike and other species, and is a valuable fishery resource for future tourism-related business opportunities within the BOA study area. A well-known fishery is located at the former marina facility south of Gratwick Riverside Park. This location is a prime bass breeding area and is well-liked by local anglers. Future redevelopment efforts associated with this marina should consider this fishery and its ability to attract anglers from throughout the Niagara region.




*Map of potential fisheries within the Niagara River.*

The remediation of Gratwick Riverside Park introduced several revetment, or piles of stone, structures into the Niagara River. These revetments are serving a dual purpose as fish attraction structures. A new accessible fishing pier will be constructed in 2010 on top of one of these revetments to provide proper access for anglers. The accessible pier is the first of many improvements resulting from the recently completed Park Master Plan. Additional environmental and habitat improvements recommended in the master plan include improved wetland areas along the shoreline, and the installation of old field habitat to promote the use of this site by birds. Environmental education stations are proposed to provide interpretive and self-guided visits to learn more about the Niagara River ecosystem.

Veteran's Park (formerly Fisherman's Park) is the former site of industrial shipping slips that have been dredged into the shoreline, and is another fishing

[1] *Groundwater Primer*, Purdue University College of Engineering,, 1997 (http://cobweb.ecn.purdue.edu/~epados/ground/src/confined2.htm)

destination within North Tonawanda. These slips offer easy access to water for fisherman. The City has been coordinating with the DEC on the dredging of these slips to clear out debris and provide deeper, cooler water to attract fish.

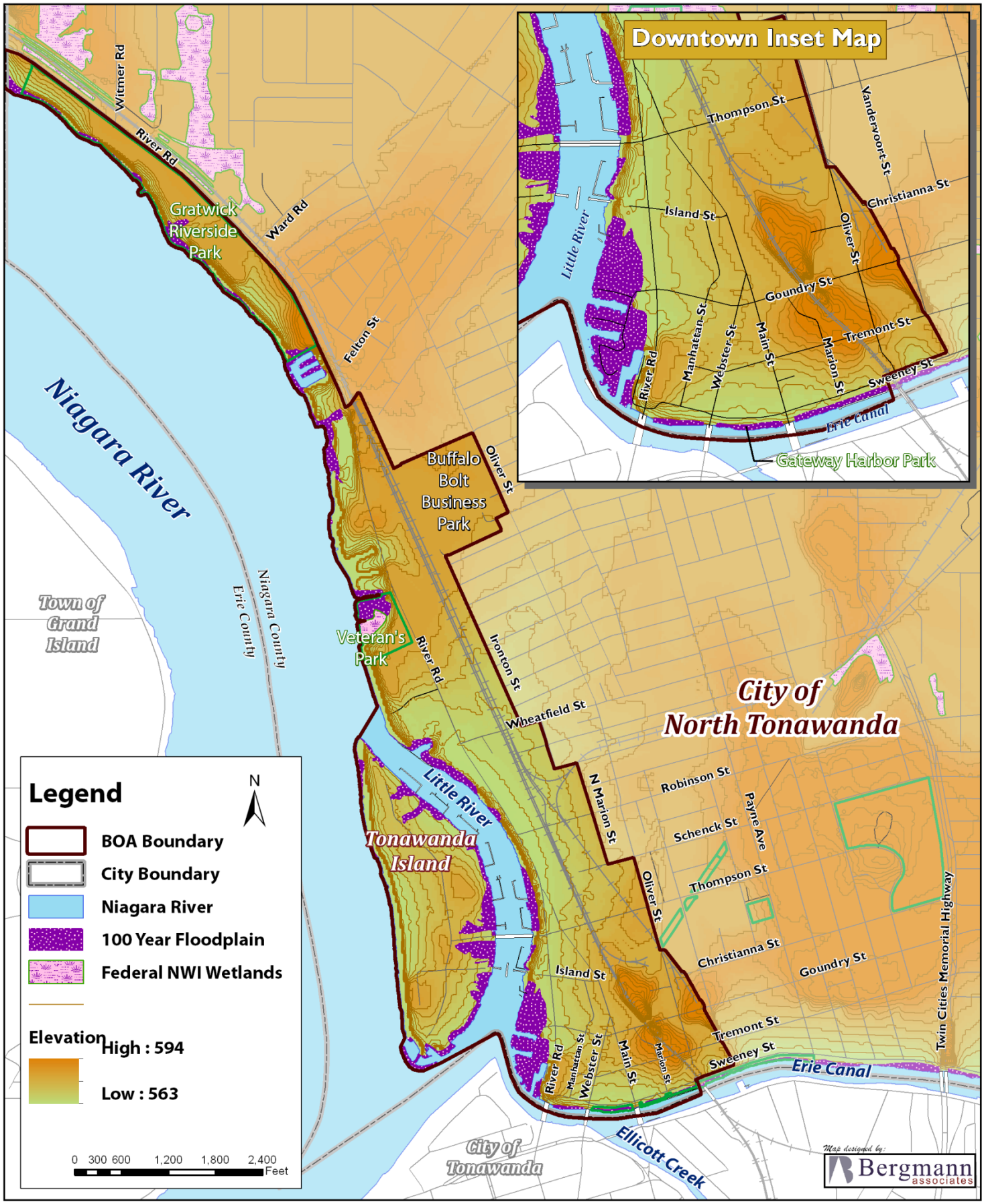
In October 2008, the NYS DEC Natural Heritage Program issued an environmental assessment for the City of North Tonawanda, and indicated a handful of rare or state-listed animals, plants, and natural communities. Of greatest importance in this listing is the identification of the Niagara River as a Waterfowl Winter Concentration Area. While the area of greatest potential for waterfowl attraction is south of North Tonawanda, activities such as dredging, filling, and bulkheading are a threat to the habitat. Further threats include discharges from combined sewer overflows and industrial sites. Development projects along the Niagara River and on Tonawanda Island need to be cognizant of these threats.

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

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**MAP 14**
**Natural Features**

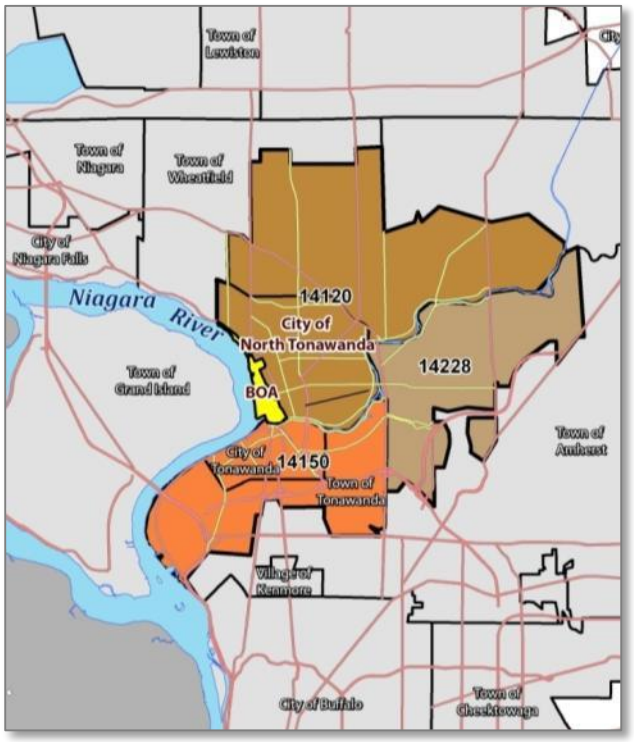


# 3.4 ECONOMIC AND MARKET TRENDS ANALYSIS

The development of an Economic and Market Trends Analysis ensures that market-based recommendations for the study area are considered in conjunction with physical and spatial recommendations. When the market analysis is considered in tandem with existing physical conditions, realistic redevelopment sites, a multi-phased land use plan, and timeframes for redevelopment scenarios can be identified. Understanding the development scenarios that will lead to the greatest long-term investment and benefit for the community is directly tied to understanding the local markets, both regionally, citywide, and within the BOA.

As part of the Economic and Market Trends Analysis for the BOA, regional demographic, economic and market trends and projections were analyzed to determine how these factors may influence and impact the local economy and redevelopment of the BOA. To understand the local factors which would impact local reuse and redevelopment, a "trade area" was defined consisting of three zip codes (14150, 14120, and 14228). This area, shown in Map 14, incorporates the BOA study area, as well as portions of surrounding communities.

***Figure 1: BOA Trade Area Zip Codes***




The following summary highlights the key information associated with market conditions relative to residential, retail, commercial, and industrial development opportunities. The full Economic and Market Trends Analysis is included in Appendix B.

## 3.4.1 General Economic Outlook

The general economic outlook for the region was analyzed using data from Niagara County and western New York to determine what factors may impact the ability of the North Tonawanda BOA to capitalize on various redevelopment scenarios. The general economic outlook compared the Trade Area to upstate New York, the State and the Nation in terms of job growth, regional industry demands and economic base. This information helped provide background information and a context for the market analysis. It was important to acknowledge that the Trade Area does not act in a bubble and is impacted by the region in which it sits.

The economic base of Niagara County is heavily weighted towards government, health care, retail trade and manufacturing, with approximately 58 percent of the region's jobs attributed to these four sectors. There will be no growth in the County's employment opportunities over the next five years, with total jobs declining by 200, a decrease of 0.25 percent. As a comparison, the Upstate region has projected growth of 4 percent, the State projects 6 percent growth and the United States projects 9 percent growth.

The unemployment rate in Niagara County was particularly high in 2009, and ranks 7th out of 62 counties in New York State in terms of high unemployment levels. The highest unemployment rate is in the *mining industry* with over 50 percent unemployment as a percentage of the total jobs in this category. The industry with the highest number of unemployed residents is the *manufacturing industry*, with over 2,000 residents unemployed.

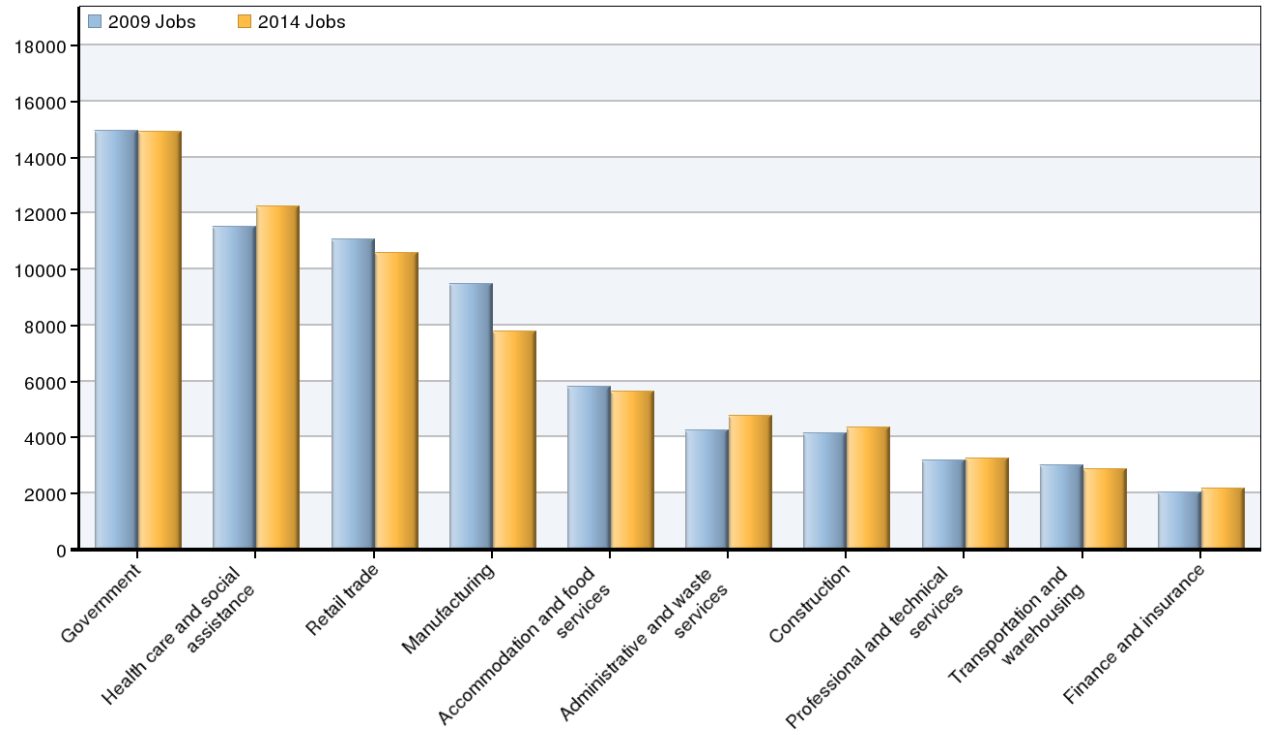
The industry with the lowest unemployment rate is the *utilities industry* with only 1.37 percent unemployment, or 11 unemployed persons. Other industries with low unemployment rates include *health care and social assistance* (4.24 percent), *educational services* (3.53 percent) and *agriculture* (2.51 percent).

The *health care industries and associated fields* not only have low unemployment rates but are also expected to grow at one of the quickest rates in the next few years, adding almost 747 jobs in the next five years (6.5 percent increase). The *Administrative and waste services* sector is also expected to gain over 500 jobs in the next five years. The *manufacturing industry* is expected to continue to decline over the next five years, losing over 1,500 jobs or a decrease of 17 percent. Top employment sectors by industry in Niagara County are shown in Figure 1.

### 3.4.2 Demographic Overview

The existing conditions demographic report identified trends of the North Tonawanda BOA Trade Area and how the trends relate to other parts of the State and Nation. This demographic analysis helps identify unique characteristics of the area which may be important as part of identified redevelopment scenarios. The demographic indicators analyzed include population, household income, age distribution, racial composition, typical occupations and other features which impact the retail, employment and residential needs. The findings will help to identify a direction for the redevelopment plan which will be compatible with the current population and/or meet the needs of potential future residents.

***Figure 2: Top Employment Sectors by Industry, Niagara County***



The population of the Trade Area is decreasing slowly, approximately 0.33 percent annually through 2014. In comparison, the State's population is expected to decline by approximately 0.10 percent annually and the national population is projected to grow by .91 percent annually between 2009 and 2014. The median household income is expected to increase at a rate of just over 1.5 percent annually through 2014 or a total of 8.2 percent by 2014, slower than both the State and the Nation.

The age distribution in the Trade Area is relatively similar to the rest of the State. The location quotient graph for age shows that there are proportionally more people aged 70-80 years old living in the Trade Area as compared to the State average and less people aged 35-39 years old.

### 3.4.3 Residential Analysis

The Residential Analysis looked at existing housing stock, current residential unit status, prices of renting and other factors which play a role in the residential market. This provided information on residential development potential in the area market and on the types of residential development needed or over-represented in the area.

There are over 45,000 housing units in the Trade Area, 64 percent owner-occupied, about 30 percent renter-occupied, the rest are vacant (6.3 percent). Homeownership is expected to increase slightly in the next five years. In the City of North Tonawanda, 6 percent of residential units are vacant, a lower percentage than exists in the City of Buffalo or the City of Niagara Falls, 21.8 percent and 19.9 percent respectively.

Most of the residential units are single family detached structures (67.3 percent), with the next most common being a 2 family house (10.4 percent). Compared to upstate New York, the Trade Area has a higher proportion of single family detached houses and a slightly lower proportion of two family houses. The value of owner-occupied homes increased dramatically between 2000 and 2009, jumping from $86,000 to almost $150,000 in 2009. However, the projected increase between 2009 and 2014 is a more steady increase of $30,000. This is a similar trend for upstate New York, the State and the Nation. The average monthly mortgage for residents who own their home is approximately $1,051 a month. The average monthly rent in the Trade Area is $480, which is slightly higher than the Upstate average of $433 a month.

***A high percentage of homeowners pay no mortgage, signaling that many homeowners have lived in their home long enough to pay off their mortgage or have inherited the home.***

***EXISTING HOUSING STOCK***

Existing housing stock in the Trade Area is expected to stay relatively stable with some slight increases in owners and decrease in renters. Key findings associated with housing in the Trade Area are:

- Approximately 65 percent of available housing will be occupied by owners in 2014 and 27 percent occupied by renters.
- There is a projected increase in the number of vacant units between 2009 and 2014.
- In contrast to the increase in vacant units, a projected increase of around 200 new units is anticipated in the next five years.
- Of the residential units in the Trade Area, over 70 percent were built prior to 1969, with the median year the structure was built being 1957.

The City of North Tonawanda has a significantly higher percentage of owner occupied units as compared to the City of Buffalo and the City of Niagara Falls. Overall, the City of North Tonawanda and the BOA are doing well in terms of maintaining a low percentage of vacant units and a pattern of strong homeownership, as compared to Buffalo and Niagara Falls. A summary of residential status for the Trade Area is shown in Table 13.

***The Western New York housing market experienced significantly less severe impacts of the housing crisis than other parts of the country and housing prices have remained relatively stable.***

The *Niagara Communities Comprehensive Plan 2030* report, provides a breakdown of the vacancy rates in Niagara County. The report shows that the highest levels of vacancy rates in the City of North Tonawanda exist within the BOA area, closer to the waterfront, although these rates are not has high as in the City of Niagara Falls or some communities located along Lake Ontario.

The Trade Area has a higher percentage of single family detached structures as compared to upstate NY and the United States. The Trade Area also has more residential structures with 5-9 units than the rest of upstate NY or the US. Additionally, there are substantially fewer mobile home units as a percentage of all units in the Trade Area as compared to Upstate and the rest of the United States.

### *CURRENT RESIDENTIAL VALUE*

Owner occupied units in the Trade Area have been generally increasing in value.

- In 2000, the median home value of owner occupied units in the Trade Area was just $86,000 but that value increased substantially by 2009.
- In 2009, a majority of the houses (82 percent) were valued between $100,000 and $250,000. Housing values are projected to remain stable through 2014.

The median and average value of owner occupied housing units in the Trade Area is slightly lower than those in upstate NY and substantially lower than owner occupied units in the United States. Compared to other regional cities, the City of North Tonawanda and the BOA are more expensive for owning and renting, with higher median mortgage and rent payments. Compared to upstate NY and the US, rent and mortgage payments are lower in the Trade Area.

Approximately 30 percent of the residents living within the Trade Area rent their homes. Generally, residents living in renter-occupied housing units are paying between $350 and $600 per month, with very few paying over $1,500.

***Table 13: Trade Area Residential Unit Status***

| | *2000* | | *2009* | | *2014* | |
|---|---|---|---|---|---|---|
| **Total Housing Units** | 45,575 | | 47,119 | | 47,318 | |
| | *Number* | *Percent* | *Number* | *Percent* | *Number* | *Percent* |
| **Owner Occupied** | 30,379 | 66.7% | 30,039 | 63.8% | 30,961 | 65.4% |
| **Renter Occupied** | 13,221 | 29.0% | 14,089 | 29.9% | 12,706 | 26.9% |
| **Vacant** | 1,975 | 4.3% | 2,991 | 6.3% | 3,651 | 7.7% |

***RESIDENTIAL MARKET OUTLOOK***

As the country continues to rebuild after the crash of the housing market, many areas have seen a decline in real estate values, a tightening of the credit market and many more homeowners have been pressured to sell quickly.

Some of the primary trends in multi-housing projects in the Buffalo area include some large scale senior housing developments, including a 164-unit facility in the Town of Tonawanda, and student housing projects including a 140-unit project in Cheektowaga. Many of the student housing projects are occurring close to colleges and universities in the area, including Buffalo State, Canisius, Medaille and the State University at Buffalo. There are also some unique projects occurring in the City of Buffalo including the renovation of older buildings into loft style apartments and condominiums.

A unique residential project in the City of North Tonawanda is the reuse of the Remington Rand building, which was redeveloped as a mixed-use residential and commercial complex. The project is located on the waterfront within the BOA area and within walking distance to downtown. This project includes 81 units of live-work space for rent ranging from $1,000 - $3,500 a month and offers city residents amenities such as a yoga studio, restaurant and hair salon.

## 3.4.4 Retail Market Analysis

A Retail Market Analysis was prepared to examine current retail sales and demand within the Trade Area. The goal of this process was to identify the unique characteristics or niche markets that the area may have which can be developed or built upon. In addition to identifying niche markets for further development, the retail market analysis can pinpoint retail services which are missing from the region, resulting in residents going elsewhere to purchase goods and services. The retail market analysis also outlines consumer spending habits within the region, identifies retail demand and household characteristics. The market analysis found existing underserved sectors that could be targeted for location in the Trade Area.

Consumer spending patterns in the trade area also say a lot about the current market and what potential exists for additional services and retail amenities. The consumer spending index identified that households in the Trade Area spend proportionately more of their income on health care and utilities as compared to the national average and relatively less on other goods such as apparel. As unavoidable expenses such as health care and utilities continue to go up, Trade Area residents may have less money to spend on discretionary items such as travel and entertainment. The local residents are spending close to the national average on some luxury items, such as vacation homes and food away from home.

***SALES LEAKAGE***

The demand for goods and services that is not being met locally is referred to as *sales leakage*. The leakage occurs because consumers make purchases at establishments located outside the defined Trade Area. For example, there were approximately $15 million of retail sales in the *Clothing Store* category in the Trade Area. However, Trade Area residents spent approximately $49 million on these types of goods. Therefore, residents spent about $33 million outside of the Trade Area on *Clothing*, and this $33 million is considered sales leakage.

Sales leakages can be viewed as a potential opportunity for unmet demand in a Trade Area to be recaptured by new local businesses. Sectors experiencing leakage in the BOA Trade Area include:

- Motor Vehicle & Parts Dealers
- Furniture & Home Furnishings Stores
- Health & Personal Care Stores

- Gasoline Stations
- Clothing Stores
- Food Services and Drinking Place
- Sporting Goods Stores
- General Merchandise Stores

It is important to note that just because an industry sector is exhibiting leakage within a particular trade area does not automatically indicate that it will be a good fit for that trade area. Many other factors should be examined when determining whether a retail category should locate in a given place. The retail potential for additional stores within the Trade Area is analyzed later in this report and identifies which industries have enough retail leakage to potentially support additional retail outlets.

***Sectors with a positive retail gap or sales leakage can be good markets to pursue because residents are currently going outside of the Trade Area to make purchases. A new business in the Trade Area could potentially capture those residents. Alternatively, an industry with a surplus could provide a niche market upon which the area could build.***

### *SALES SURPLUS*

Conversely, if the supply of goods sold exceeds trade area demand, we assume that non-residents are coming into the trade area to spend money, creating a *sales surplus*. There are two likely reasons a sales surplus condition would exist. First, a cluster of competing businesses offering a similar good or product may be located within the trade area, creating a specialty cluster that draws in spending by households from outside the trade area. Secondly, a sales surplus may indicate a saturated retail market, where supply exceeds demand.

Industries that have a large sales surplus compared to their total sales within the BOA include:

- Office Supplies, Stationary, and Gift Stores
- Used Merchandise Stores

### *RETAIL USE FEASIBILITY STUDY*

A retail use feasibility analysis identifies which of the industries with sales leakages have enough customers to potentially warrant opening a brand new site. This type of analysis helps to identify target businesses which will be successful. This analysis assumes 25 percent of residents who are currently going elsewhere to shop will instead stay within the BOA and spend their money locally if new stores or businesses existed. This recapture rate depends largely on the current existing amenities, commuting patterns and residents' affinity towards certain stores or brands and may be higher or lower than what is assumed in this analysis.

Most of the industries are experiencing very large retail gaps, making it possible for additional businesses to open within the Trade Area. The number of retail establishments, by type, that could be supported locally in the Trade Area are identified in Appendix B.

Highlights of these opportunities within the BOA include:

- Twenty-eight (28) full service restaurants
- Ten (10) clothing stores
- Two (2) shoe stores
- One (1) book store
- Four (4) health and personal care stores
- Three (3) gas stations
- Three (3) home furnishing stores

The methodology and additional information associated with identifying retail gaps in the Trade Area are included in the full Market Analysis in Appendix B. Capitalizing on the existing sales leakage would allow the local municipalities to recapture some of the currently leaking retail sales, creating additional sales tax revenue, jobs and investment in the community. Further investigation into the current needs of residents, and potentially visitors, will be imperative to determine what, if any, of the retail sectors should be sought after and attracted to locate within the North Tonawanda BOA.

### *CONSUMER SPENDING PATTERNS*

To evaluate the spending patterns of residents within the Trade Area, a current estimate of consumer expenditures for goods and services was prepared. This particular analysis looks at the spending of Trade Area residents but does not indicate where these expenditures were made or whether they were made in or out of the Trade Area. The analysis presents the purchasing power of the households within the Trade Area.

***Residents in the Trade Area are spending close to the national average on a few luxury items, such as vacation homes, food away from home, entertainment and travel.***

Overall, the total expenditures for households in the Trade Area are significantly less than the national average. This indicates that Trade Area households are spending less than the national average on almost every consumer item with few exceptions. Categories where residents within the Trade Area are spending above the national average are mostly on items considered necessity, as opposed to luxury items. For example, residents are spending higher than average on natural gas, fuel oil, and care for the elderly and handicapped.



*Auto Zone occupies a high profile site near the gateway to the City and is currently being advertised For Lease.*

### *RETAIL MARKET SPACE AVAILABILITY*

The North Tonawanda BOA Trade Area has been included in local retail market studies and is identified as part of the Boulevard Mall submarket. Overall, the Western NY Retail Real Estate Market changed by less than 1 percent per year over the last five years. The Retail Real Estate Market has mirrored national trends including low levels of new development. The Boulevard Mall submarket has over 5 million square feet of total retail space and almost 500,000 square feet of available inventory. There has been an increase in vacancy rates in the Boulevard Mall submarket.

### 3.4.5 Office and Industrial Market Analysis

The office and industrial market analysis compares existing conditions and available space to projected trends in employment growth in the Trade Area to better understand the market and identify any possible opportunities for development.

***REGIONAL ECONOMIC GROWTH***

An analysis of the growth/decline in the various industrial sectors can provide information about where there may be a market for additional industrial or office space. It also can give a good indication of whether jobs are coming to the area or if the area is experiencing a decline in job opportunities.

Overall there will be an increase in the number of jobs available in the next five years. It is projected that there will be 1,105 new jobs created, or a 2 percent increase in job opportunities for residents of the Trade Area. The largest employer in the Trade Area is the *Administrative and Waste Services* sector, followed by *Manufacturing* and *Retail Trade*.

The industry sector experiencing the most growth in the next five years is the *Administrative and Waste Services* sector. This sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. The administrative and management activities performed by establishments in this sector are typically on a contract or fee basis. Overall, the sectors experiencing the most growth can be defined as typical office utilizing industries.

- There will be a strong increase in the *Finance and Insurance* sector, the *Management of Companies and Enterprises* sector, and the *Health Care and Social Assistance* sector.
- Office space utilizing industries should be capable of supporting infill development and the adaptive reuse of existing buildings within downtown North Tonawanda.
- A typical industrial space utilizing industry that is expected to gain jobs in the next five years includes the *Transportation and Warehousing* industry.
- Typical industrial space utilizing industry that is expected to experience a steep decline in the coming years is the *Manufacturing* sector with a projected 14 percent (1,060) of the jobs lost over the next five years. Even with this steep decline, *Manufacturing* will remain the second largest employer in the Trade Area.
- There will also be a loss of jobs in the following sectors: *Professional and technical services; Wholesale Trade; Other services, except public administration; Information and Utilities.*

***OFFICE SPACE AVAILABILITY***

In 2007, there was development of over 1,100,000 square feet of new office space in Western New York and an additional 804,248 square feet in 2008. This space is being absorbed at a steady level and there continues to be strong demand.

According to locally developed office space documents, the North Tonawanda BOA is considered part of the Suburban North region of the Buffalo market. The Suburban North market showed the strongest increase in office space availability, with an increase of 473,048 total square feet added in the past year. The City of Buffalo central business district saw an increase of 128,000 square feet and an upgrade in some Class B space. The Suburban South market saw an increase of 30,000 and the upgrade of some Class C space and the Suburban East market saw an increase of only 120,000 square feet.

### *INDUSTRIAL SPACE AVAILABILITY*

The Western New York industrial market has been performing better than national trends indicate. During the past year industrial vacancy decreased from 9.7 percent to 9.5 percent which is equal to a reduction of almost 60,000 square feet of industrial space being utilized or removed from the market. While this is a positive trend, it is important to note that the current vacancy rate is higher than other major regional cities including Toronto and Cleveland (5.8 percent and 8.2 percent, respectively).

The Suburban North market experienced an increase of 151,000 square feet of flex and manufacturing space in the last year. There is a total of almost 650,000 square feet of available industrial space, but there was a decrease in vacancy rate in the manufacturing and warehousing space over the past year. The Suburban North region has had three consecutive years of high absorption rates.

An important event in the past year with respect to available industrial space was the addition of 360,000 square feet of manufacturing space which was created as part of the Niagara Frontier Transportation Authority's Terminal "A" building expansion project. This additional space may impact the attractiveness of industrial space in the North Tonawanda BOA and within the Trade Area.

# 3.5 TOURISM MARKET ANALYSIS

The City of North Tonawanda recognizes the need to capitalize on the tourism market and potentials afforded by their strategic location. With its long history of a manufacturing and industrial community, it will be necessary to diversify the economy to ensure long term sustainability and employment opportunities for residents.

There has been a good amount of research done on the tourism industry in Niagara County and the ever increasing number of visitors coming to experience Niagara Falls each year. The Niagara Tourism Convention Corporation reports estimate that approximately 6 million people visit Niagara Falls each year and this number is reported to be growing.

***There is a clear opportunity for North Tonawanda to capture some of the visitors already traveling to Niagara Falls through special events, services, and offering unique attractions and a distinctive experience.***

## 3.5.1 Existing Tourism Resources

The City of North Tonawanda has been working steadily to increase visitation to the Gateway Harbor district (Webster Street/historic downtown) and the BOA in order to boost the local economy and drive more spending in the area. During the summer months there is a lot activity along the waterfront including concerts, boats docked along with canal and an increasing number of regional tourists looking to spend time in the Gateway Harbor district and enjoy their boat.

To spur additional economic activity and increase spending at local businesses, the City needs to provide visitors with overnight options and resources to entice them to stay longer in the area. The effort to increase the number of days and nights spent in the city has been difficult due to the lack of hotel rooms in the city. The lack of a hotel makes it virtually impossible to capture overnight spending from visitors to the Buffalo-Niagara region, one of the most heavily traveled tourist destinations in United States.

A quick internet search, similar to one a potential visitor might conduct, of hotel rooms in the City of North Tonawanda show that there are no hotels within the downtown but that there is a wide variety of options in the surrounding towns, offering various amenities and price points. Even outside of direct proximity to the Falls, surrounding towns have hotel options for visitors looking to spend time in the Buffalo-Niagara region. For example, Niagara Falls Boulevard is cluttered with hotels in the Town of Amherst (southeast of the Trade Area) and Niagara Falls (north of the Trade Area).

The City of North Tonawanda is developing opportunities and resources for visitors, including regular festivals, concerts and events throughout the summer. The City is also actively working to revitalize the Gateway Harbor district to appeal to and accommodate a growing number of tourists. The revitalization of the Gateway Harbor district has been successful but full realization of the economic activity has been diminished by the lack of overnight stay options. The City reports that there are between 4,000 and 8,000 visitors to the concerts, and many boats docked at City docks throughout the summer months. It has been difficult for the City to identify ways to attract visitors during the winter months, since the waterfront is the primary attraction.

Although the City has been successful in generating tourism activity and regional entertainment during the summer months, it has been difficult to make it a year-round tourist destination. The seasonal nature of tourism in upstate New York is something that many communities struggle with, and it is oftentimes necessary to find alternative attractions for the winter months.

The City has attractions other than the Canal and waterfront that they can market, including the Riviera Theater which offers a wide variety of performances that appeal to families and young adults, the Herschell Carrousel Factory Museum, Carnegie Art Center, and the Ghostlight Theater. These alternative attractions do not generate enough activity to warrant a new large hotel, but in combination with regional attractions they could bring more people into the area throughout the year.

### 3.5.2 Regional Tourism Activity

The tourism industry has slowly become a more prominent source of employment for people throughout the United States, due to the increase in tourism activity in recent history. The increases in leisure time, wages and access to affordable transportation have made the tourism industry expand to employ approximately 4 percent of the private sector workforce. While the tourism industry is expanding, it is important to compare it to other large national industry sectors, such as health care, which accounts for approximately 13 percent of employment.

For Upstate New York, tourism has been identified as a possible supplement to economies that are facing a loss of employment in the manufacturing sector. The transition of employment from a manufacturing base to a tourism base can be difficult due to the seasonal nature of tourism businesses and the typically low wage jobs associated with the tourism industry. A balance of traditional economic development and the development of the tourism economy will provide the City with the best chance for a diversified economy.

The growth of employment within the New York State tourism industry has been slower than the growth of the same industry for the nation. This industry base has become more important over the past decade for the County with an increase in tourism-based businesses and a decline in the manufacturing industry.

Niagara Falls is one of the most well known tourist destinations in the nation, and people come from all over to visit the Falls and experience the local culture and tourist resources that exist on both the United States and Canadian sides of the Falls. There has been a recent push to develop more attractions on the US side to compete with the shopping, casinos and museums available on the Canadian side which has been acquiring more and more of the market share over the years. Niagara County has also been actively developing tourist attractions, such as the Niagara County Wine Trail, which runs by the City of North Tonawanda, the redevelopment and branding of the Erie Canal Heritage Corridor, and Old Fort Niagara.

The City of North Tonawanda is located in an advantageous spot that is central to the City of Buffalo, SUNY Buffalo campus, Niagara Falls, and the Erie Canal. There are three city docks located in the City of North Tonawanda making it a natural docking location for people traveling the Great Lakes, the Erie Canal or general boating on the Niagara River.

The Niagara County Comprehensive Economic Development Strategy reports that approximately 12 million people visit Niagara Falls each year (studies suggest that 6 million visit the United States side). If the City, which is only 10 miles from the Falls, is able to capture 0.5 percent of the US visitors they could have an additional 30,000 people coming to the city each year.

### 3.5.3 Local Trends in Tourism Related Industries

The BOA Trade Area (Map 14), which includes zip codes in Erie County, has shown a slight increase in tourism related industry jobs over the past 5 years, including a 6 percent increase in the *Arts, Entertainment, and Recreation* industry and a 3 percent increase in the *Accommodation and Food Services* industry since 2005. However, within the *Arts, Entertainment and Recreation* industry, most of the jobs are in the *Fitness and Recreation Sport Center* industry, which is not a typical tourism related industry.

Looking closer at the *Accommodation and Food Services* industry sector, it is clear that most of those jobs are made up from the *Food Services and Drinking Places* sector, which makes up 6.07 percent of all jobs within the Trade Area. The *Accommodation* industry sector makes up just a very small percentage of the Trade Area's total employment.

Within the *Food Services and Drinking Places* sector, it is the limited-service eating places that have the highest percentage of employment and that number continues to grow. Limited- service eating places are defined as: establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery. These establishments are usually lower priced than full-service and attract a different type of client. The limited-service establishments will appeal to visitors coming by boat who may be looking for something quick to eat within the area and who may not want to spend much time indoors.

### 3.5.4 Economic Development through Tourism

The *Niagara Communities Comprehensive Plan 2030* discusses the County's desire to increase tourism throughout the county, not just directly around the Falls. This push to connect resources will be vital to assisting the City and BOA in capturing some of the tourists. One of the goals identified in the plan was to "improve tourism and tourism-based business opportunities throughout the County."

In order to accomplish this, the plan identified a recommendation to "support efforts to create physical linkages and link business information between Niagara County's communities that will help extend the stay of tourists, and thus spread economic wealth throughout the County". There is a concerted effort to increase tourism in Niagara County and the City of North Tonawanda is not able to capitalize on this effort due to its lack of hotel space.

### 3.5.5 Economic Impact of Tourism

In order to demonstrate the impact of a hotel project on the Trade Area, an economic impact analysis on a hypothetical 40 room hotel was prepared. The analysis assumes that the 40 room hotel is charging $115.00 a night and has a 60 percent average room occupancy rate per year. Table 14 depicts the calculated annual sales of the hypothetical hotel.

**Table 14: Annual Sales of Hotel Development**

| *Hypothetical Hotel Development* | |
|---|---|
| **Number of Hotel Rooms** | 40 |
| **Occupancy** | 60% |
| **Occupied hotel rooms** | 24 |
| **Cost per night** | $115 |
| **Annual Sales** | $1,007,400 |

The economic impact of a particular project is a sum of the direct and indirect impacts. The direct impacts are those directly related to the project or site in question (additional sales at the hotel). The indirect impacts are those which occur as the dollars from direct impacts cycle through the economy.

***The economic impact of a 40 room hotel development would mean an additional $1,390,212 in sales, 21 new jobs and an additional $479,000 in new wages for the BOA Trade Area.***

For example, the spending by the hotel company at local businesses generates new sales and need for employees. The new employees receive wages and in turn spend a portion of those dollars in the local economy for daily needs, housing and other expenses and a proportion of those dollars are again re-spent in the local economy. As those dollars continue to circulate, additional jobs and business activity are created. This effect is captured in the indirect impacts and is known as the multiplier effect.

**Table 15: Economic Impact of Hotel Development**

| | *Direct* | *Indirect* | *Total* |
|---|---|---|---|
| **Sales** | $1,007,400 | $382,812 | $1,390,212 |
| **Jobs** | 16 | 5 | 21 |
| **Wages** | $330,345 | $148,655 | $479,000 |

In addition to the impact of the hotel itself, having visitors in the area overnight will increase spending at the local gas stations, retail stores, grocery and convenience stores, and local attractions. As this money is spent, it too will circulate throughout the economy generating additional jobs and business activity.

### 3.5.6 Summary of Tourism Market Opportunities

The City must be creative, build on its local heritage and promote its unique assets when working to build the local tourism economy.

Since the city lacks a supply of hotel rooms, potential does lie in the development of a small hotel to begin to capitalize on tourists to the region who may be visiting Niagara Falls, the Niagara Gorge and other heritage and cultural amenities in the region. Any hotel would need to have some type of unique aspect in order to capture visitors to the city who otherwise have many other options in the region.

One way the hotel could be unique is to market to boaters as being accessible by boat, no car required. If possible, the hotel could have its own dock and marina as well as run shuttles to the other public docks in the city, or could be within walking distance of all the public docks. Marketing campaigns will be necessary to make sure that all those traveling to the region by boat are aware of the unique facility and all the amenities available. Since this hotel demand is seasonal, it may be necessary to combine the development with apartments and mixed-uses. By having a variety of uses, it is feasible that the project will not only attract more attention, but will also be financially successful.

If the City hopes to increase overnight stays and attract boaters from a further distance, meeting the needs of boaters will be important. For example, the City may want to consider attracting a small convenience store that the boaters could use to buy supplies. The LDCD is working on building a hotel within the Gateway Harbor/Webster Street area, which could be marketed to boaters who are traveling the Erie Canal. The City could work with local retailers to offer incentives to those visiting to come to the area by offering discounted tickets to shows at the Riviera when combined with a local restaurant.

# 3.6 SUMMARY ANALYSIS OF THE BOA

The Summary Analysis of the North Tonawanda BOA looks at trends and opportunities impacting redevelopment, recommendations for revitalization of the BOA and how they relate to the overarching vision and guiding principles. Strategic redevelopment sites are also identified.

## 3.6.1 Trends and Opportunities Impacting Revitalization

While the North Tonawanda BOA has several strengths upon which to build a strong and prosperous future, it must also manage and address planning obstacles resulting from past events. The City is fortunate to have significant opportunities to capitalize upon and, when combined with its strengths, places North Tonawanda in a position to be a regional destination for visitation, investment, living, and working.

### *SUMMARY OF LOCAL AND REGIONAL DEMOGRAPHIC AND MARKET TRENDS*

Revitalization efforts within the North Tonawanda BOA must be grounded by realistic and achievable recommendations based upon demographic and market trends. The following is a brief overview of demographic and market trends within the BOA, City and region.

**Population & Income Trends**

- Slow, persistent decline in population is anticipated to continue through 2014 at a pace three times that of New York State, and counter to national population growth.
- The City is experiencing an increase in its senior population, creating opportunities for age-in-place housing, amenities and programming that caters to this age group.
- The number of school-aged youth in the City has been gradually declining.
- Median household incomes are anticipated to grow at rates slower than the State and nation, struggling to keep up with inflation.
- Trade Area residents are consuming luxury items and services at near national levels, while also spending more on necessities such as energy and dependent care services.
- Discretionary spending on items such as clothing, entertainment and food is below the national average.

**Employment Trends**

- Trade Area jobs are anticipated to increase two percent through 2014.
- Job growth is expected within the service sector, primarily in administrative, office support, finance, management and insurance.
- Historic mainstays of employment such as manufacturing, information and utilities will continue to decline, continuing the trends of the last two decades.

**Housing Trends**

- Housing continues to be affordable even though median values have increased 74 percent since 2000, and are projected to increase 20 percent from 2009 to 2014.
- Home ownership rates are high.
- Vacancy rates are low.
- A significant number of homeowners do not carry a mortgage.
- Less than 17 percent of households spend 35 percent or more of household income on housing costs, compared to 20 percent for the Buffalo-Niagara region and 28 percent nationally.

**Development Trends**

- Office space continues to expand in Buffalo's northern suburbs, and absorption is steady.
- Industrial vacancy rates remain higher than those found in Cleveland or Toronto.
- The market for small, flexible light industrial and office space continues to grow.

**Tourism Trends**

- The City attracts an estimated 4,000 to 8,000 visitors during summer and fall events.
- An estimated eight million people visit Niagara Falls annually.
- City does not currently offer year-round tourism opportunities or amenities, such as a hotel.

### *FUTURE ECONOMIC AND MARKET TRENDS*

**Key Opportunities for the Future:**

- ***Mixed use developments with diverse housing options.***
- ***Smaller, more flexible office and industrial space.***
- ***Four-season, family-oriented attractions and programs.***

The future economy of North Tonawanda will not be driven by a single industry, but will grow and prosper through the provision of a safe, convenient, affordable and high quality atmosphere for a diverse range of residents and businesses. The existing supply of housing, services, employment and resources must be fully leveraged to adapt to changing factors, such as the age and income of the local population. Regional and national factors such as energy prices, the national economy, and large generational shifts should also be considered in the development of an economic strategy for the next 10 to 15 years.

**Diverse Housing Options**

Locally, regionally, and nationally, the shift of the baby-boomer generation into retirement is having a large impact upon demand for housing, social and recreational services, and consumer goods. A particular area impacted by this changing demographic group has been an increase in demand for luxury condominiums and high-end townhomes, as many of these empty-nest families seek a home with reduced maintenance needs. In many instances, this housing is located adjacent to or in association with homeowners associations which may provide social and recreational services, but may also include medical and transportation alternatives. Within the BOA, Tonawanda Island may be an appropriate location for this type of housing within a larger mixed use development.

A future economic trend associated with housing is the need for greater energy efficiency in new and existing homes. Western New Yorkers pay more for energy than the national average, which may be attributable to the cold winters experienced in the region. The increase in retirees and fixed-income senior households will increase the demand for weatherization assistance and energy efficient new construction practices.

**Flexible Office & Industrial Space**

In the business sector, demand is increasing for smaller, more flexible spaces that can meet the changing demands of growing companies. The expense of relocation and outfitting space can become a major deterrent to start-ups and small businesses. Therefore, opportunities exist to provide incubator and flexible industrial/office space.

While large scale manufacturing should not be a primary focus for development within the BOA, data for Niagara County suggests employment growth through 2020 in machine shops, clay product and refractory manufacturing, architectural and structural metals, and plastics and rubber manufacturing. Although these industries are experiencing growth, the City should be open to attracting any type of small industry to fill existing vacant space rather than focusing limited resources on one particular sector.

**Family-Oriented Tourism**

North Tonawanda is located in the middle of the Buffalo-Niagara Region, an area that receives an estimated eight million visitors annually. However, the City has struggled to consistently attract year-round visitation, in part due to a lack of programming and attractions during the months of November thru May. Although there are several historic and culturally oriented destinations within downtown, improved coordination is necessary to increase public visitation and awareness. National and regional trends indicate the desire for families with young and school-aged children to have easy, year-round access to family-oriented destinations. This remains another opportunity the City can capitalize upon.

Based upon an analysis of the BOA's retail and tourism markets, there is an underserved demand for full service restaurants and a lack of overnight accommodations within the City. The Erie Canal, Downtown, and the Niagara River are all resources potentially attractive to restaurateurs, and the development of these businesses within the BOA will contribute to a high quality experience for both residents and visitors.

By expanding the ability to attract visitors throughout the year, support services such as hotels, inns, and restaurants will gradually fill associated demand. When concentrated in a well-defined location, these services and activities may also attract an increased permanent population. Together, a modest tourism economy and a stable population base can create a mutually supportive economic environment.

***PUBLIC INVESTMENT OPPORTUNITIES***

There are three critical areas in which North Tonawanda can make investments to improve the likelihood of successful implementation efforts moving forward: physical improvements; people and organizations; and regulatory change. These areas represent the factors impacting investment and development decisions over which North Tonawanda can have significant control. Other factors, such as regional/national politics and economic conditions also impact the ability of the City to implement the BOA recommendations, yet these factors cannot be controlled at the local level.

The following represents an overview of the investments in infrastructure, regional capacity, and regulatory change needed to successfully implement the BOA.

**Infrastructure**

Infrastructure is the framework upon which all future investments are made. In North Tonawanda's BOA, the ability of existing infrastructure to support future development varies.

Direct investments in upgrading or improving roadways can improve a community's chances for luring large, traffic intense developments such as industrial or mixed use commercial projects. The ability of the public sector to shoulder the burden of these investments limits private developer risk, and also indicates that the community is a willing participant and supporter.

*Durkee Bridge and Tonawanda Island*

In North Tonawanda's BOA, significant investments in roadways on Tonawanda Island are necessary to support existing and future development. The Durkee Bridge deck is nearing the end of its lifespan, and Michigan Avenue and Detroit Street are in need of resurfacing and/or reconstruction. Major roadway projects are important opportunities for the

improvement of pedestrian and bicycle mobility, especially in areas intended to be utilized for mixed commercial and residential uses. In the process of making improvements to the bridge and roadways on Tonawanda Island, pedestrian and streetscape considerations should also be addressed, including lighting, street trees, and sidewalks.

*River Road*

River Road is the primary roadway corridor within the BOA Study Area, and while its surfacing is in good condition, the roadway is oversized on many segments. As part of future infrastructure investments, River Road should be investigated for a 'road diet', pedestrian accessibility and safety improvements, and streetscape enhancements. This corridor is a critical gateway to the City and the BOA, creating important first impressions upon visitors while distributing traffic throughout Study Area. In addition to investments to 'right-size' the corridor, targeted wayfinding improvements at strategic locations and gateways will also improve the corridor's ability to funnel people towards important destinations, such as Tonawanda Island and downtown.

*Waterfronts*

North Tonawanda is a waterfront community, with the City's economic prowess throughout the 19th and early 20th centuries predicated on its access to water. The transition of North Tonawanda's waterfronts to largely supporting the tourism and recreation industries has lead to significant investments in infrastructure for recreational craft, including docks, launches, small-boat marinas, and other facilities, including Gateway Harbor and the public infrastructure along the Erie Canal adjacent to downtown.

While the private sector accounts for the majority of waterfront infrastructure investments, the City has significant opportunities to spur economic activity via waterfront infrastructure investments. Additional dockage along the Erie Canal in Gateway Harbor would further enhance the City's potential to attract canal travelers and visitors from the Great Lakes. Improvements to comfort and convenience facilities along the canal for boaters, such as sanitary pump-outs, electrical and water service, high-speed internet connectivity, restrooms and showers, laundry facilities, information services, and transportation rentals would attract avid boaters. The City should consider the feasibility of privatizing the management and/or ownership of some of these services to improve the economic benefits spurred by public and private spending.

*Little River & Tonawanda Harbor*

In addition to new infrastructure investments, the City should seek new methods for leveraging existing infrastructure. Tonawanda Harbor along the Niagara River north of Tonawanda Island is a deep water harbor with near shore access and moorings for large vessels. The former harbor for Tonawanda Iron and Steel, this infrastructure is unused, threatening its long term functionality. Adjacent landside property is largely vacant and ready for a major water-dependent user to leverage the northern-most deep water harbor south of Niagara Falls.

*Rail*

North Tonawanda was once a major crossroads for rail in Western New York at the interface with the Erie Canal. A major CSX line connecting Buffalo, Niagara Falls and Toronto carries regular traffic through the City, though few sidings are in use, and much of the infrastructure is abandoned or falling into disrepair. The City should seek to coordinate with track and right-of-way owners to return abandoned rail corridors to productive use as trails, or to be re-subdivided into adjacent lots to improve redevelopment opportunities. Where practical, the City should also seek to protect rail infrastructure for historical, cultural, and recreational purposes, as railroads have authored significant chapters of the City's history.

*Utilities*

Often overlooked and buried underground, utilities carry the necessary energy, information and resources to and from businesses and properties, enhancing their economic utility and development potential. The availability and capacity of this infrastructure is critical for large-scale industrial, mixed use and residential developments. Gratwick Riverside Park lacks sufficient access to sanitary, water, electric and telecommunications infrastructure. Without utility service, the park will struggle to achieve its vision as a regional destination within the Niagara River corridor. Providing basic utility service to Gratwick Riverside Park should be a high priority to continue the park's development and the ability to leverage Niagara River Greenway funding resources.

The current capacity of sanitary sewer and electricity to Tonawanda Island is potentially insufficient to meet the demands of future development. The adequacy of infrastructure available on the island and a plan for meeting the needs of future development should also be a high priority to improve the attractiveness of Tonawanda Island for redevelopment.

**Local and Regional Capacity**

The City's Lumber City Development Corporation (LCDC) provides all of the City's economic development coordination capacity, including interfacing with businesses, investors, developers, and regional agencies. The City should consider expanding the staffing capacity of this organization to facilitate implementation efforts. Significant planning projects have take place within the City over the past seven years, and North Tonawanda is now poised to shift significant resources and efforts from planning to implementation. The coordination with entities such as the Niagara County Industrial Development Agency, Empire State Development Corporation, and the Office of Community Renewal should continue to be spearheaded within the LCDC organization. Additional efforts should include coordination with the economic development and regional promotions agencies for the cities of Niagara Falls and Buffalo to leverage North Tonawanda's geographic location in the region.

**Regulatory Change**

With the necessary physical infrastructure, people and organizations in place, the final component of a successful revitalization strategy is creating a strong, effective and supportive regulatory framework. The City of North Tonawanda must update and revamp its zoning code to be a flexible and agile document that can meet the needs of the City and private development in a continuously changing environment.

*Zoning Code*

Significant portions of the City's Zoning Code date to the 1950's, with most relevant changes taking place in 1989 resulting from the adoption of the City's Local Waterfront Revitalization Plan. The Zoning Code must be updated to reflect current best practices regarding land use controls for downtown and waterfront environments. Additional regulations pertaining to mixed use districts and planned development districts should be developed to improve the ability of private investors to provide the City and its residents with well conceived projects, many of which will be complex infill or redevelopment projects.

The creation of a Design Overlay District will also serve to guide property owners and potential developers on the City's vision for a given location prior to expenditure of design or engineering monies. The Design Overlay District will create guidelines for site design, streetscape design, and architectural design to help streamline the approval process and shorten the timeline from application to approval.

## 3.6.2 Strategic Sites for Investment

A significant number of parcels within the North Tonawanda BOA have been categorized as having strategic importance for redevelopment or enhancement (Map 15). The following section provides an overview of redevelopment and enhancement opportunities within the BOA.

A further description of recommendations and reuse potential for each of these sites can be found in Section 4.0. Table 16 provides an overview of all strategic sites by Character Area.

When evaluating individual sites within the North Tonawanda BOA it is clear that although some sites provide notable opportunities for significant new development, there are also sites with existing buildings and facilities whose enhancement could serve to further revitalization efforts on surrounding properties. Thus, strategic sites within the North Tonawanda BOA have been divided into two categories, 1) strategic redevelopment sites and 2) strategic enhancement sites. Each of these are further summarized below.

***REDEVELOPMENT SITES***

Strategic redevelopment sites include those parcels that have been determined to be of critical importance to the overall redevelopment of the BOA based on their environmental status, vacancy, or current underutilized status.

Redevelopment sites were identified and categorized into short-term (0-5 years), mid-term (5-10 years), and long-term development sites (10+ years) based on a series of planning level criteria, community input, and their potential to serve as a catalyst for additional redevelopment.

Specific criteria considered in determining strategic redevelopment sites and their phasing include:

- Environmental status;
- Location;
- Ownership;
- Current use or vacancy;
- Redevelopment defined as a community priority as part of this or past planning processes; or,
- site has been determined to be catalytic in nature, with the ability to spur redevelopment in adjacent areas.

Additional information on sites included within each of the redevelopment phases is included below. Maps referencing the build-out scenario for the BOA to be completed and inserted here.

**Short-Term Redevelopment Sites (0-7 years)**

These sites have been identified as critical initiatives that upon completion have the potential to initiate extensive investment and activity in surrounding neighborhoods. Many of these sites occupy a prominent or important location along the waterfront, have high quality views, or are adjacent to a primary community gateway.

The redevelopment potential of these sites should promote a positive atmosphere and send a clear signal to the region that North Tonawanda is a viable location for investment and visitation. Many of the sites identified in this group are readily available either under public-ownership or private-ownership currently for sale or lease. The ability to acquire and redevelop sites in a shortened timeframe is important to achieving a successful return on investment and quick implementation. Several sites have been previously identified as community priorities through past planning processes. The near-term redevelopment of these properties will leverage previous investments while seeking to implement established community objectives.

The following is a summary of Short Term Redevelopment sites in the North Tonawanda BOA (figure to be referenced):

- Gratwick Riverside Park;
- Buffalo Bolt Business Park;
- Former Jones Box Company (Tonawanda Island);

- Shores Restaurant and Marina (Tonawanda Island);
- Former Fire Training Facility (Tonawanda Island);
- AutoZone Property;
- North Main Street Properties;
- Remington Rand Property; and
- Weatherbest Slip.

**Mid-Term Redevelopment Sites (7-15 Years)**

Redevelopment sites categorized as mid-term priorities represent the second phase of investment and represent projects that would likely not achieve their fullest potential without the aid of previous investments to set the stage for revitalization. Upon review of all strategic sites within the BOA, these properties addressed several selection criteria. However, in most instances, the property's ownership, availability for development, or location precluded them from categorization as a shorter-term site. The importance of these sites, however, should not be understated. The redevelopment of these properties is necessary to continue revitalization efforts and support the success of existing investments.

The following is a summary of key properties categorized as a Mid-Term Redevelopment Sites:

- Former International Paper Site (Tonawanda Island);
- Island Street;
- River Road;
- Booth Oil Site;
- Oliver Street at Thompson Street;
- AutoParts Property; and
- North Main Street.

**Long-Term Redevelopment Sites (15 + Years)**

Many of the sites identified as long-term redevelopment sites occupy important locations within the BOA. However, ownership issues, market demand, and the surrounding development pattern likely preclude the near-term redevelopment of these properties to their highest and best use. A significant proportion of the long-term sites are infill projects within the downtown core. It is anticipated that the significant investments required for these properties will follow the property enhancement investments recommended for adjacent areas.

The following lists the key sites identified as Long-Term Redevelopment Sites:

- Former Tonawanda Iron Works Site;
- Ironton Street Industrial;
- East Pier and Bow & Stern Marinas;
- Duluth Alley;
- Webster/Tremont Intersection; and
- Marion/Goundry Street.

***ENHANCEMENT SITES***

Strategic enhancement sites are those parcels of land that have existing buildings or businesses but would benefit from reinvestment. Enhancements might mean a change in the building use to something more suitable for a given location, façade improvements, site improvements, or the preservation of a historically significant structure. The properties identified as key strategic enhancement sites have been noted because they are important buildings or sites within the BOA study area

Recommended enhancement sites, as depicted on Map 15, are located along the following corridors:

- Webster Street;
- River Road;
- Oliver Street; and
- Main Street.

While some properties may be suffering from higher degrees of disinvestment, others may benefit from only modest investments to improve both their function and appearance within the community.

**Table 16: Strategic Redevelopment & Enhancement Sites, by Character Area**

| Strategic Site | *Gratwick Riverfront* | *River Road Corridor* | *Buffalo Bolt Business Park* | *Tonawanda Island & Little River* | *Downtown Central Business* |
|---|---|---|---|---|---|
| **Gratwick Riverside Park** | *1* | | | | |
| **Buffalo Bolt Business Park** | | | *1* | | |
| **Tonawanda Island – Former Jones Box Company** | | | | *1* | |
| **Tonawanda Island – Shores Restaurant and Marina** | | | | *1* | |
| **Tonawanda Island – Former Fire Training Facility** | | | | *1* | |
| **AutoZone Property** | | | | | *1* |
| **North Main Street Properties** | | | | | *1* |
| **Remington Rand Property** | | | | | *1* |
| **Weatherbest Slip** | | | | *1* | |
| **Tonawanda Island – Former International Paper Site A** | | | | *2* | |
| **Island Street** | | | | | *2* |
| **River Road** | | *2* | | | |
| **Booth Oil Site** | | *2* | | | |
| **Oliver Street at Thompson Street** | | | | | *2* |
| **AutoParts Property** | | | | | *2* |
| **North Main Street** | | | | | *2* |
| **Tonawanda Island – Former International Paper Site B** | | | | *3* | |
| **Former Tonawanda Iron Works Site** | | *3* | | | |
| **Ironton Street Industrial** | | *3* | | | |
| **East Pier and Bow & Stern Marinas** | | | | *3* | |
| **Duluth Alley** | | | | | *3* |
| **Webster/Tremont Intersection** | | | | | *3* |
| **Marion/Goundry Street** | | | | | *3* |
| **Webster Street** | | | | | *E* |
| **River Road** | | *E* | | *E* | |
| **Oliver Street** | | | | | *E* |
| **Tremont Street** | | | | | *E* |

*1 = Near-Term Priority, 2 = Mid-Term Priority, 3 = Long-Term Priority, E = Enhancement Site*

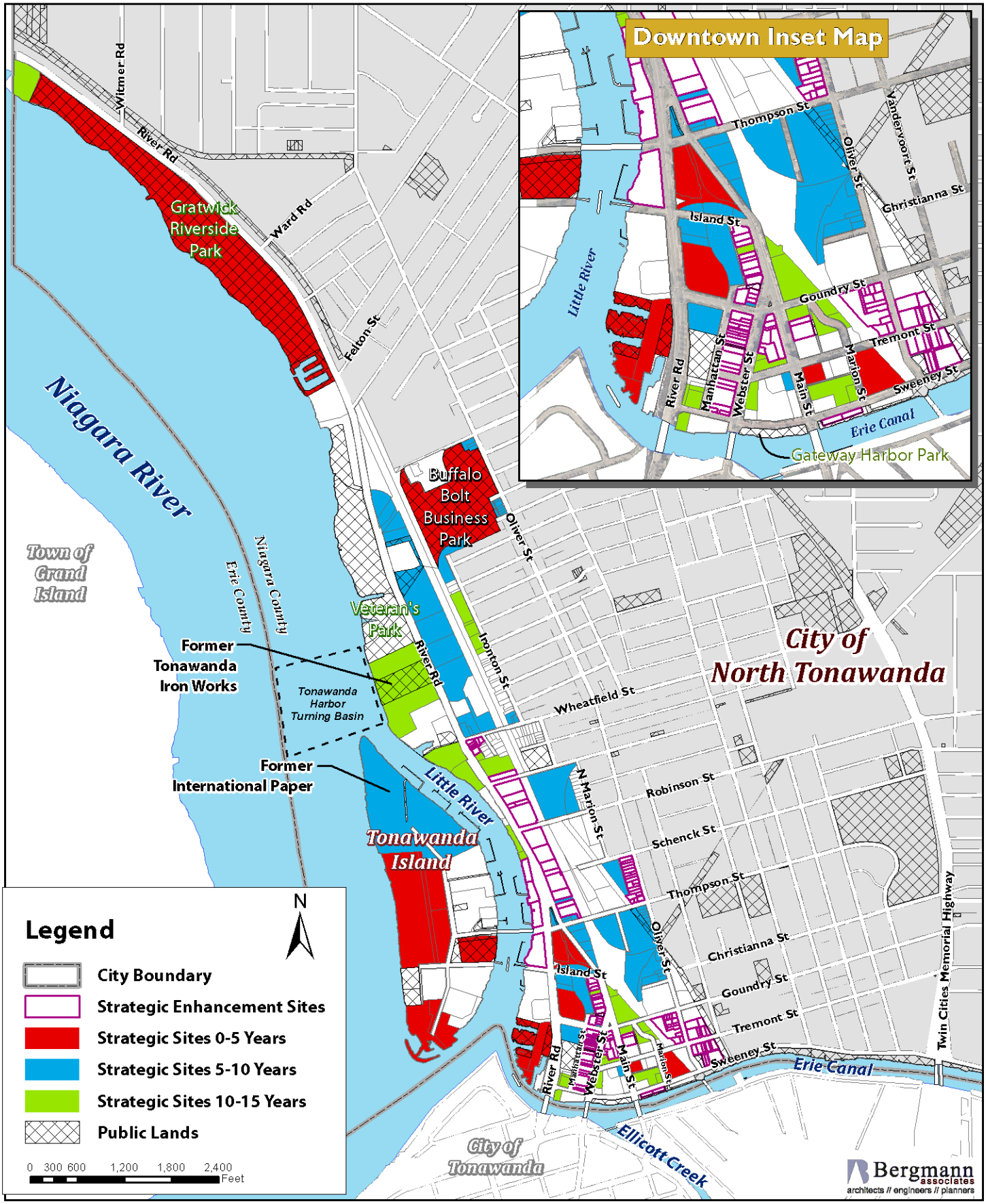
# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 15**

**Strategic Sites**



# *Section 4: BOA Master Plan*

## 4.1 OVERVIEW

The BOA Master Plan represents the culmination of the Nomination Study process and includes recommendations made after numerous meetings with the City, project stakeholders, public agencies, business and property owners, and residents of North Tonawanda. The Master Plan is divided into three sections: Recommended Capital Projects; Land Use and Zoning Recommendations; and Development and Revitalization Principles.

The Capital Projects recommended in Section 4.2 are development and investment initiatives to be implemented in a phased approach over the course of the next 5 to 20 years. The Land Use and Zoning Recommendations made in Section 4.3 highlight the regulatory changes necessary to achieve the vision of the Master Plan. Finally, the Development and Revitalization Principles discussed in Section 4.4 represent recommended policies and non-capital actions the City should implement as a framework for future revitalization within the BOA Study Area. An overview of the funding for BOA implementation is also included in Sections 4.2 and 4.5; however, this topic will be covered in greater detail upon the advancement of the North Tonawanda BOA to Step 3 Implementation of the NYSDOS BOA Program.

## 4.2 CAPITAL PROJECTS

The Master Plan for the North Tonawanda BOA includes a series of 31 recommended capital projects to be accomplished over the next 20 years. Recommended projects range from the creation of pocket parks and streetscape enhancements to large, complex development projects involving the construction of mixed-use buildings and structured parking. Maps 16 through 20 depict the phased build-out of the BOA Study Area as envisioned in the Master Plan.

Each of the recommendations made within the Master Plan relate to the Development and Revitalization Principles outlined in Sections 1.4 and 4.4 of the Nomination Study. These principles inform and direct the decision making process by providing a broad outline of design considerations to be utilized during redevelopment initiatives.

The phasing of recommendations, to be described in further detail in Section 4.2.2, provides an orderly sequence of events that build upon existing and initial infrastructure investments critical to supporting future development. Together, the development principles, Master Plan and phasing approach provide a refined, yet flexible set of recommendations and guidance for the continued revitalization of North Tonawanda's Brownfield Opportunity Area.

### 4.2.1 Development Projects

The BOA Master Plan makes specific recommendations regarding the implementation of several projects, including public waterfront access, the improvement of public spaces, the development of mixed-use nodes, and the enhancement of the River Road corridor. The following is a brief overview BOA Master Plan recommendations, which have been grouped into three categories: private development; public realm improvements; and infrastructure investments.

***PRIVATE DEVELOPMENT***

Private development will be responsible for the majority of capital improvements and investments within the Master Plan. The greatest density of private development occurs on Tonawanda Island and within the downtown core. Development recommendations in these locations seek to increase the downtown and waterfront population by significantly increasing housing stock availability across a broad range of potential residents. Large mixed-use developments are proposed that will be driven by the private sector, yet will capitalize upon initial public investments in infrastructure such as the waterfront promenade and Tonawanda Island Boulevard.

Commercial and industrial development interests are focused on River Road and the Buffalo Bolt Business Park, with these recommendations seeking to increase the City's employment base. These investments are also envisioned to leverage previous public investments made in the Buffalo Bolt Business Park, and future investments in River Road. The BOA Master Plan encourages the City to promote a heightened standard of design and implementation for all private development projects. A detailed description of private development recommendations by phase is included in Sections 4.2.2 through 4.2.4.

***PUBLIC REALM IMPROVEMENTS***

Public realm improvements are responsible for providing an improved quality of life for residents and visitors. Recommended projects include the construction of a promenade and multiple waterfront plazas to provide continuous public access along the Niagara River and Little River shorelines on Tonawanda Island and the west side of River Road. The redevelopment of portions of the Weatherbest Slip properties greatly improves public access to the waterfront at the confluence of the Erie Canal and Niagara Rivers. The continued redevelopment of Gratwick Riverside Park will provide a City-wide and regional destination for water-dependent and water-enhance recreation. In addition, numerous small parks and open spaces are proposed that provide connectivity with the existing open space network, and leverage abandoned rail infrastructure. A detailed description of public realm recommendations by phase is included in Sections 4.2.2 through 4.2.4.

***INFRASTRUCTURE INVESTMENTS***

The redevelopment of the North Tonawanda BOA as will require a range of infrastructure improvements, including upgrades and enhancements to existing roadway infrastructure in critical areas such as Tonawanda Island, River Road, and Oliver Street. The timing of these improvements should also coincide with proposed gateway enhancements to provide a kick-start to revitalization efforts on adjoining properties and build community momentum. New infrastructure investments should be focused on the Buffalo Bolt Business Park, Gratwick Riverside Park, and Tonawanda Island. These roadway investments will be required to spur future private development and implement recommendations previously made for these sites. A detailed description of infrastructure investment recommendations by phase is included in Sections 4.2.2 through 4.2.4.

## Implementation Phasing Plan

*Phase One - 0 to 7 Years*

1. Gratwick Riverside Park & Marina Improvements
2. Buffalo Bolt Business Park Redevelopment
3. North Island Residential and Park Development
4. Taylor Drive and Island Boulevard Construction
5. Tonawanda Island Promenade
6. Phase One Hotel and Restaurant
7. Office Mixed-Use
8. Retail / Restaurant Mixed-Use and Little River Promenade
9. Hotel and Restaurant
10. Downtown Structured Parking
11. Oliver Street Enhancements
12. New Pocket Park
13. Gateway Memorial Park

*Phase Two - 7 to 15 Years*

14. Gratwick Riverside Park Redevelopment Phase Two
15. Tonawanda Island Internal Roads, Central Park, Mixed-Use Buildings and Phase Two Townhouses
16. River Road Reconstruction
17. Industrial Infill, Redevelopment, and Access Management
18. Mixed-Use Redevelopment
19. Interpretive Rail Park and Museum
20. Thompson Street Improvements
21. Weatherbest Slip Redevelopment
22. Downtown Mixed-Use Infill Development
23. Main Street Pedestrian Enhancements

*Phase Three- 15 to 20 Years*

24. Gratwick Riverside Park Redevelopment Phase Three
25. Residential Condominiums
26. Mixed-Use with Structured Parking
27. Hotel Phase Two
28. Townhomes and Oliver Street of Shoppes
29. Enhanced Oliver Street Gateway
30. Mixed-Use Housing and Municipal Parking Lot
31. Manhattan Street Mixed-Use and Parking Structure

Map designed by: Bergmann associates

CITY OF NORTH TONAWANDA

CITY OF TONAWANDA

Erie Canal

Little River

Niagara River

Oliver St

Payne Ave

Vanderwoort St

Main St

Webb St

River Rd

Ironton St

River Road

Island Boulevard

Pearl St

Pelton St

West Rd

Durkee Bridge

Robert Moses Bridge

Thompson St

Sheridan St

Manhattan St

Grand St

Chamberlain St

Courtney St

Strawbridge St

## North Tonawanda Brownfield Opportunity Area

### Nomination Study

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**MAP 16**

**PHASING PLAN**

Map designed by: Bergmann associates

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

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**MAP 17**

**Overall Masterplan**

### 4.2.2 Strategic Sites and Development Recommendations

Each of the Strategic Redevelopment and Enhancement Sites outlined in Section 3.6.3 and Table 16 have been included within the BOA Master Plan as a development recommendation. The recommendations made within the Master Plan will necessitate significant levels of public and private investment to achieve, require a phased approach to leverage previous investments and gather momentum for the on-going revitalization of North Tonawanda.

A 20-year implementation horizon is envisioned and presented on the overall phasing diagram on Map 16. This is a long-term master plan that balances a unique vision for North Tonawanda with market and economic realities. Not all projects may transpire exactly as proposed, but the master plan provides a framework for thoughtful and careful planning. Flexibility in the phasing and implementation of the master plan should be anticipated and expected.

Map 17 identifies the Overall BOA Master Plan, which is subdivided into three phases:

- Phase I projects represent critical and catalytic investments that lay the groundwork for future projects, and should establish a benchmark for quality to be achieved or eclipsed by subsequent efforts (see Map 18).
- Phase II projects are anticipated to build upon the momentum gathered in Phase I. These projects are expected to occur in years seven through 15, and should promote early signature projects enhancing the identity of the BOA Study Area (see Map 19).
- Phase III projects represent the culmination of 15 years of implementation through public and private investment. These projects are intended to maximize available density and development potential, while capitalizing upon North Tonawanda's renewed identity as a premiere waterfront community in Western New York (see Map 20).

***PHASE I: 0-7 YEARS***

Much of the groundwork for Phase I projects were previously completed through the efforts of the City, including the Master Plans for Gratwick Riverside Park and Buffalo Bolt Business Park. Thirteen projects are recommended to take place over the course of the first seven years of implementation. Map 18 depicts Phase I recommendations, including the following projects:

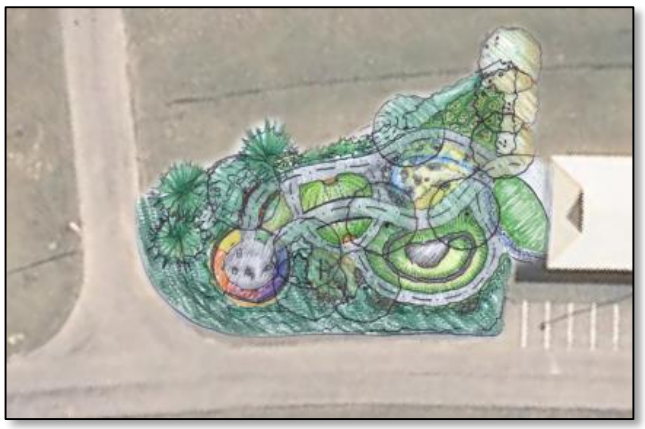
1. Gratwick Riverside Park Redevelopment Phase 1
2. Buffalo Bolt Business Park Redevelopment
3. North Island Residential & Park Development
4. Taylor Drive & Island Boulevard Reconstruction
5. Tonawanda Island Promenade
6. Hotel Phase 1 & Restaurant
7. Office Mixed-Use
8. Retail/Restaurant & Little River Promenade
9. Boatel, Restaurant & Public Access
10. Downtown Structured Parking
11. Oliver Street Enhancements
12. New Pocket Park
13. Gateway Park

**1. Gratwick Riverside Park Redevelopment Phase 1**

*Public Realm Improvement*
*Public Cost: $500,000 to $1 million*
*Funding Sources: NYS LWRP, NYS EPF, NYS EFC, Niagara River Greenway*

The Gratwick Riverside Park Master Plan was completed in 2009 and the first implementation action was the construction of an Accessible Fishing Pier in 2010 funded by Niagara River Greenway Commission. Additional Phase I improvements call for continued enhancements to increase the family-friendly atmosphere and recreational offerings within the park.

The continuation of Phase I improvements will require funding sources in addition to that available via the Niagara Greenway Commission. The City should investigate an application for a grant through the NYS Environmental Protection Fund's Parks Program and Local Waterfront Revitalization Program, which would support projects such as the design and construction of restrooms and kitchen facilities at the existing shelter, or the construction of a children's natural playground. Additional funding will need to be sought for the design and installation of a sanitary force main to service the renovated pavilion, with potential funding available from the NYS Environmental Facilities Corporation.



*A conceptual rendering of the Phase I children's natural play area at Gratwick Riverside Park.*

**2. Buffalo Bolt Business Park Redevelopment**

*Private Development*
*Public Cost: $2+ million (this public investment is complete, no further public investment is expected)*
*Funding Sources: various*

The Buffalo Bolt Business Park Master Plan proposes 156,000 square feet of industrial, manufacturing, professional office and retail space within the Business Park's 24-acre boundary. Additional commercial/retail and services would be located along Oliver Street to service new employees and support the surrounding residences. It is anticipated that at full build-out, the Business Park could support approximately 400 employees and provide a significant boost to the neighborhood and local economies.

The development of the Business Park's roadway and utility infrastructure will be completed in 2011, and the City has experienced early success in marketing the approximately eight shovel-ready sites. The continued marketing of remaining parcels should be targeted to ensure that future businesses are creating jobs and providing needed development mix within the park.

In addition, streetscape improvements along Oliver Street should be completed to finalize the development of a high-quality business park, including the provision of enhanced lighting, paving materials, and landscaping. The City should also coordinate with the Niagara Frontier Transit Authority on the development of a bus-stop within the park or along Oliver Street to improve the range of transportation alternatives for future park employees.

The City will utilize BOA Step 3 funding to create marketing materials and enforce the brand identity of the business park.

**3. North Island Residential & Park Development**

*Private Development / Public Realm Improvement*

The privately-owned northern tip of Tonawanda Island provides a significant opportunity for public access and open space that is coordinated with private residential development. The Master Plan recommends small clusters of townhomes and condominiums set within a naturalized setting. The perimeter of the island should remain open to public access and enjoyment, including a focal point located at the northern-most point. The development should include direct access to private docks located in the Little River, with slips potentially included in the sale of residential units.

The next step of the redevelopment process will include further coordination with property owners on their intentions to develop the property. An agreed upon framework for development should include the ability to perform a Phase II Environmental Site Assessment to ascertain environmental conditions, which would permit the City and property owner to seek funding and support for remediation activities from the NYS DEC Brownfield Cleanup Program.

As part of the BOA Step 3 Application, the City has requested funding to generate recommendations for the assembly and redevelopment of privately-held property within the BOA. The lands along the northern portions of Tonawanda Island should be included in this study to consider all feasible options that will lead to the successful implementation of the BOA Master Plan for this area. This property may also be considered as part of a series of financial analyses and pro-formas to be completed during BOA Step 3 Implementation activities, further bolstering the potential for redevelopment.

**4. Taylor Drive & Island Boulevard Construction**

*Infrastructure Investment*
*Public Cost: up to $5 million*
*Funding Sources: US DOT STP, US DOT TIGER, NYS DOT TEP, US DOT Congestion Mitigation and Air Quality (CMAQ)*

The roadway infrastructure on Tonawanda Island requires significant reinvestment prior to recommended private development activity. Michigan Street and Detroit Street are proposed to be redeveloped as Island Boulevard. The new tree-lined, two-lane roadway is anticipated to be funded by a combination of private money with state and federal subsidies. The project should include a central landscaped median and potentially a focal point gateway and new Taylor Drive roundabout.

As part of the BOA Step 3 Application, the City intends to undertake advanced planning and conceptual design alternatives for targeted areas within the BOA. As well, Step 3 activities include pedestrian access feasibility studies for the Durkee Bridge and a potential new pedestrian bridge. The scope of these efforts should be coalesced to include alternatives for the redevelopment of Taylor Drive and Island Boulevard. These roadways must provide pedestrian-safe environments that add to a unique sense of place on the island.

**5. Tonawanda Island Promenade**

*Public Realm Improvement*
*Public Cost: up to $1 million*
*Funding Sources: NYS Parks EPF, NYS LWRP, NYS Parks Recreational Trails,*

The provision of public access to the Niagara River waterfront should be of paramount importance during the initial implementation phase of the BOA Master Plan. The proposed promenade extends along the western shoreline, and should seek to connect the northern and southern tips of the island. Several enlarged gathering spaces or plazas provide the interface between private development and the public waterfront. These public realm improvements should be required as part of the redevelopment of Tonawanda Island, provided via a public/private partnership or other agreement (see Figure 3).

The development and implementation of this promenade will require several public and private sources of funding. The Niagara River Greenway Commission is a stable and flexible source of funding that can be utilized for public projects. In addition, NYS EPF funding via the NYS Parks Office and the NYS DOS Local Waterfront Revitalization Program can also be utilized to acquire property and develop public improvements.

As part of BOA Step 3 Implementation activities, the City should investigate the ability for public funding to be utilized for these improvements, and begin coordination with private entities should these lands be required to be under public control. The City should also investigate the potential to have portions of Tonawanda Island infrastructure designated or included as part of the Great Lakes Seaway Trail, which would provide access to additional marketing and tourism resources.



*The Battery Park Promenade in New York City offers an example of how to create a unique waterfront experience in a narrow corridor.*




***Figure 3**: The Tonawanda Island Promenade (5) extends along the Niagara River shoreline and links proposed residential and commercial mixed-use developments, as seen in the above Phase I drawing. Phase I residential development (3) and hotel (6) are also proposed for Tonawanda Island.*

**6. Residential Mixed Use Phase 1**

*Private Development*

*Public Cost: $2 to $6 million (incentives, tax credits)*

*Funding Sources: NYS DEC BCP, NYS ESDC*

Further bolstering the formation of a critical mass of residents on Tonawanda Island, the Master Plan recommends the development of for-sale and for-rent housing units in multi-story structures along the waterfront on Tonawanda Island that can take advantage of the breath-taking views up and down the Niagara River. In the initial phase, this development is envisioned to provide high-end housing in a 4-plus story structure with the opportunity for expansion in future phases (see Figure 4).

This initial phase of development would include portions of the Tonawanda Island Promenade, including a large centralized waterfront plaza at the center of the project under public control. Ground floor tenant space should be reserved for commercial uses, such as niche retail, restaurant and personal services such health and fitness. Phase I would utilize surface parking lots on the inland side of the island, with some covered surface parking possible to support above market rate housing. Future phases of this development would include the construction of multistory structured parking in place of surface parking, and additional uses including a full-service hotel.

The development process for this privately-held property will be similar to that for the North Island Residential (3), and will require significant coordination amongst public and private interests to determine the appropriate roles and responsibilities for each party. As part of BOA Step 3 Implementation activities, the City should include this project within the land assemblage, design alternatives and business pro-forma tasks as described in their 2010 Application for Project Advancement. In addition, the City should seek authorization from property owners to complete a Phase II Environmental Site Assessment (ESA) to determine if the site includes potential environmental contamination. Any remediation efforts should be coordinated to receive tax incentives through the NYSDEC Brownfield Cleanup Program.



***Figure 4:*** *An enlarged public promenade is flanked by multi-story mixed use development that takes advantage of high-quality river views.*

**7. Office Mixed-Use**

*Private Development*

The Master Plan depicts a mixed-use office and retail structure located at the southwest corner of the new roundabout on Island Boulevard. This three-story building would include first floor retail and upper-story Class A office space that would bolster the daytime population on Tonawanda Island. The development of this project will require coordination between the City and private landowners and should be included in BOA Step 3 Implementation activities, including land assembly alternatives and schematic design alternatives. In addition, Step 3 Implementation activities should include City assistance in the identification of potential developers and tenants

**8. Mixed Use & Little River Promenade**

*Private Development / Public Realm Improvement*

The former Fire Training Facility located at the gateway to Tonawanda Island is a City-owned high priority redevelopment site. A proposed three-story structure is intended to have frontage along the Little River, Taylor Drive and Island Boulevard while providing internalize parking hidden from view. Proposed uses include upper-story residential, marine-centered retail, services and restaurants. The waterfront is proposed to include a new public access promenade that connects with Island Street (see Figure 5). In addition, the feasibility of transient and private boat dockage along the Little River should be investigated to bolster the economic viability of the mixed-use project. Due to extensive historic fill on the site, the City should complete a geotechnical assessment of the property and a Phase 2 ESA to determine the potential buildable area.

As part of the development process, the City should consider development incentives, including real property, to induce private development to fund the Little River Promenade improvements.



***Figure 5:*** *The former Fire Training Facility is proposed to be redeveloped as a multi-story retail, restaurant and office building (8), as seen at left in the rendering above. The building would front on both Taylor Drive and the Little River along a new pedestrian promenade that offers outdoor dining and public space*

**9. Hotel, Restaurant & Public Access**

*Private Development / Public Realm Improvement*
*Public Cost: Possible assistance with public access*
*Funding Sources: Private, USFWS Boater Infrastructure Grant Program (BIG), Niagara River Greenway*

The southern tip of Tonawanda Island boasts spectacular views upstream along the Niagara River towards the south Grand Island Bridges. This location also functions as the gateway to the Erie Canal and offers maritime infrastructure for the docking and launching of boats. The views, location, and infrastructure make this a good location for accommodations and services catering to the boating community. The redevelopment of the southern tip of Tonawanda Island should provide high-end services and quality architecture that establishes a refined and appealing identity for the City and its waterfront (see Figure 6).

As part of its Step 3 BOA, the City should prepare potential development scenarios complete with an investment proforma to dtermine development costs and return potential for a successful water-oriented hotel venture. In addition, the City should also investigate waterside and landside infrastructure improvements, such as utilities, docks, and comfort facilities. Significant coordination with the existing property owners will be required to ascertain current intentions for reinvestment or redevelopment of the property. The City should also seek an enhanced understanding about existing ownership/leasehold agreements between the owner and third parties for existing boat slips and dock space, and determine if these agreements will impact any subsequent sale or redevelopment of the property.

This location should also be capable of supporting a myriad of needs required by the boating public, including transient dockage, repairs, sanitary pump outs, and lift service.



***Figure 6**: The proposed hotel and restaurant proposed for the southern tip of Tonawanda Island (9) would provide boaters and visitors with much needed services, and would function as a gateway feature into the community for those arriving by water.*

**10. Downtown Structured Parking**

*Infrastructure Investment*
*Public Cost: $15 to $20 million*
*Funding Sources: Private, Public Bond, NYS ESDC, TIF and/or PIF*

As a prelude to future investments in downtown, the construction of structured parking will permit a significant increase in density while removing large surface parking lots. This project is located adjacent to the redeveloped Remington Lofts, which contains live-work residential units, office and retail space, and a restaurant. The proximity of a parking garage to this development will be critical to the success of on-going investments taking place in the neighborhood.

As part of the implementation process, the City will need to begin discussions with adjacent property owners about the potential purchase or lease of property to building the parking structure. Of particular interest to the City is the potential for surface parking lots on Tremont Street to meet the requirements for a parking structure. A minimum footprint for a parking structure is approximately 150 feet by 120 feet; two existing surface lots along Tremont Street would meet this minimum standard. Surface parking lots typically accommodate 120 spaces per acre, while structured parking can accommodate approximately 100 spaces per acre per floor. The current surface parking lots along Tremont Street can each accommodate approximately 55 vehicles. A comparable three-story parking structure would be able to accommodate 120 vehicles at an average cost of approximately $20,000 - $25,000 per space to construct, for a total of approximately $25,000,000. Further analysis on potential cost and revenue alternatives should be considered as part of a formal feasibility study.

During negotiations, the City should consider the opportunity for shared-use arrangements to provide parking availability throughout the week, yet retain revenue generation capabilities. Parking stalls within the structure could also be set aside as part of an incentive zoning package for nearby properties.

A future parking structure along Tremont Street should contain first floor tenant space for retail or service businesses. In addition to improving the street presence for the structure, the mixed-use first floor will provide additional revenues to help offset annual maintenance and financing costs.






*A parking structure with first floor retail space promotes street activity and masks the appearance of the structure within the neighborhood. Vertical and horizontal mixed use parking structures are becoming more commonplace, with many including retail, office and residential units.*

**11. Oliver Street Enhancements**

*Infrastructure Investment*
*Public Cost: $400,000 to $750,000*
*Funding Sources: NYS DEC Community Forestry; NYS EFC Green Innovations; Niagara River Greenway Commission, TIF and/or PIF*

Oliver Street functions as a neighborhood commercial services hub on the west side of the City. The street's excessive width provides ample opportunity for streetscape and mobility improvements, including the potential for a dedicated bike lane that extends north to Felton and Wards Streets and connects to the River Road multi-use path. Streetscape improvements should focus on curb bump-outs to reduce pedestrian travel distances and additional street-trees to enhance the aesthetic quality of this important neighborhood corridor.

Enhancements along Oliver Street should also include improvements to the tree canopy and the utilization of green infrastructure techniques to management storm water runoff. Urban forestry and green infrastructure funding is available through the NYS DEC Urban and Community Forestry Cost Share Grants, and the NYS EFC Green Innovations Grant Program. Niagara River Greenway Commission funding may also be eligible for use on infrastructure projects that would improve the water quality of the Erie Canal and the Niagara River.



*The narrowing of a roadway is an excellent opportunity to provide green infrastructure improvements to enhance the function and aesthetics of the neighborhood.*

**12. New Pocket Park**

*Public Realm Improvement*
*Public Cost: $200,000*
*Funding Sources: NYS Parks EPF, Niagara River Greenway, TIF and/or PIF*

The development of a neighborhood scale pocket park in this location should focus on providing unique recreational elements not found in adjacent parks, such as a 'dog-park' or other themed program. Funding for the design and development of parks can be found through the NYS Environmental Protection Fund Parks Program, which can be utilized for the planning, design, construction and acquisition of land for parks. In addition, Niagara River Greenway funding has been successfully utilized at Gratwick Riverside Park, and is also available for improvements at this location.

**13. Gateway Park**

*Public Realm Improvement*
*Public Cost: $200,000 - $500,000*
*Funding Sources: NYS Parks EPF, NYS LWRP, NYS DOT TEP, TIF and/or PIF*

The intersection of Thompson Street, Main Street, and River Road creates a large triangular shaped parcel perfectly suited to become a primary gateway element that welcomes visitors to Downtown North Tonawanda. As the opportunity arises, the City should acquire this land to create a large gateway open space that will also provide travelers with wayfinding cues as they approach Downtown. The park should include high-quality landscaping, directional and gateway signage, and public art to denote entry into the core of the City.

Similar to the pocket park (12), funding opportunities for this project include the NYS Environmental Protection Fund Parks Program and the Niagara River Greenway Commission standing committees. Funding for this project would also be available through the NYS DOS Local Waterfront Revitalization Program. The proposed reconstruction and improvements along River Road would also provide an opportunity and funding mechanism for the development of this park. During the planning and design phase of improvements to River Road, the City should seek to require a portion of project funding be set aside for pedestrian and public art improvements at this location.

The City should also seek funding through the State Transportation Enhancements Program. This program provides expanded funding for pedestrian and aesthetic improvements in connection with state and federally funded highway and bridge projects.

1. Gratwick Park Redevelopment Phase 1
2. Buffalo Bolt Redevelopment
3. North Island Residential & Park Development
4. Taylor Drive & Island Boulevard Construction
5. Tonawanda Island Promenade
6. Phase One Hotel & Restaurant
7. Office Mixed Use
8. Retail / Restaurant Mixed Use & Little River Promenade
9. Hotel and Restaurant
10. Downtown Structured Parking
11. Oliver Street Enhancements
12. New Pocket Park
13. Gateway Memorial Park

Map designed by: Bergmann associates

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 18**
**Overall Masterplan**
**PHASE 1**

### 4.3.4 Phase II: 7-15 years

After approximately seven years, initial investments in the BOA should be well underway, and the City will be poised to leverage this infrastructure and activity moving forward to Phase II. Map 19 depicts the ten development projects within Phase II of the BOA Master Plan.

**14. Gratwick Marina Redevelopment**

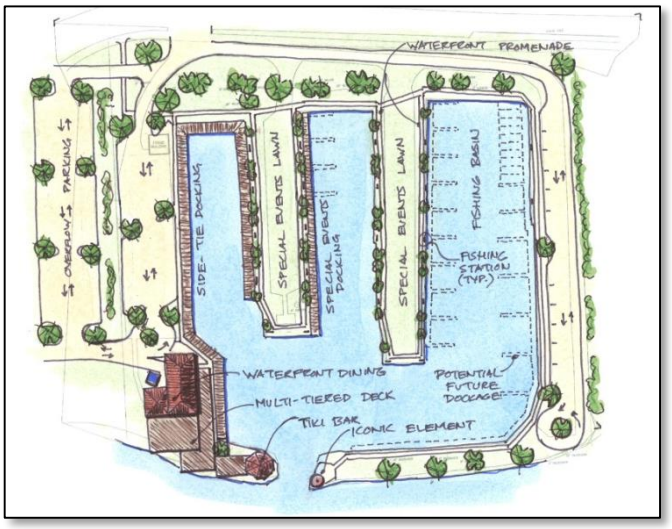
*Private Development / Public Realm Improvement*
*Public Cost: $5 million*
*Funding Sources: NYS Parks EPF, Niagara River Greenway, USFWS Boater Infrastructure Grants (BIG), NYS LWRP, TIF and/or PIF*

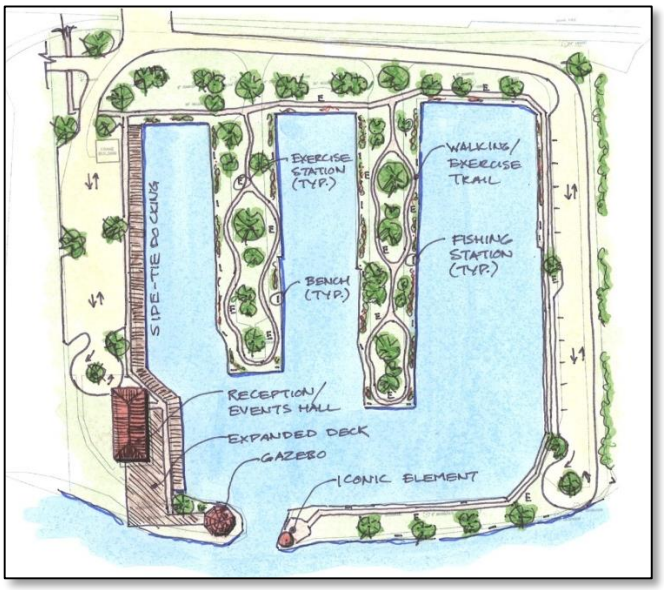
The redevelopment of the inactive marina adjacent to Gratwick Riverside Park is to include public open space and a restaurant or banquet facility. The marina is to continue servicing transient boats, while retaining a portion of the marina as a fishery. Marina grounds will be redeveloped as open space during Phase I, with the addition of a focal element at the entrance to the basin and dockage improvements taking place in Phase II.

The City was recently awarded $300,000 in Niagara River Greenway funding to undertake a series of improvements recommended by a Marina Redevelopment Feasibility Study. These improvements include:

- Rewiring electrical service to docks;
- Dock Reconstruction;
- Shoreline stabilization;
- Marina dredging and soils disposal;
- Boater welcoming signage and lighthouse reconstruction;
- Development of boater services at the reconstructed boathouse; and
- Public access trails to a new picnic point.

The redevelopment of the marina continues the implementation of the Gratwick Riverside Park Master Plan and advances the revitalization principles established in Section 1.4 of the Brownfield Opportunity Area Nomination Study.




*The above conceptual plans were developed as part of the Marina Redevelopment Feasibility Study conducted by Applied Technology and Management in 2010.*

### 15. Tonawanda Island Internal Roads, Central Park, Mixed-Use Buildings & Phase II Townhomes

*Private Development / Public Realm Improvement / Infrastructure Investment*
*Public Cost: $2 to $4 million (incentives)*
*Funding Sources: NYS DEC Brownfield Clean Up Program, NYS ESDC, LCDC, NCIDA, TIF*

The continued revitalization of Tonawanda Island includes additional mixed-use buildings with upper-story residences. Surface parking lots will be required as an interim land use prior to full-build out and the addition of structured parking in Phase III. The townhomes along the northern tip will reach full build-out at this stage, yet waterfront development is to be completed in future years (see Figure 7). As part of Step 3 Implementation Services, the City should seek to include these areas within land assemblage strategies to facilitate future redevelopment by the private sector.



*The mixed-use neighborhood created on Tonawanda Island would be pedestrian in scale, with building heights of approximately 4 stories, and architecture with high levels of first floor transparency.*

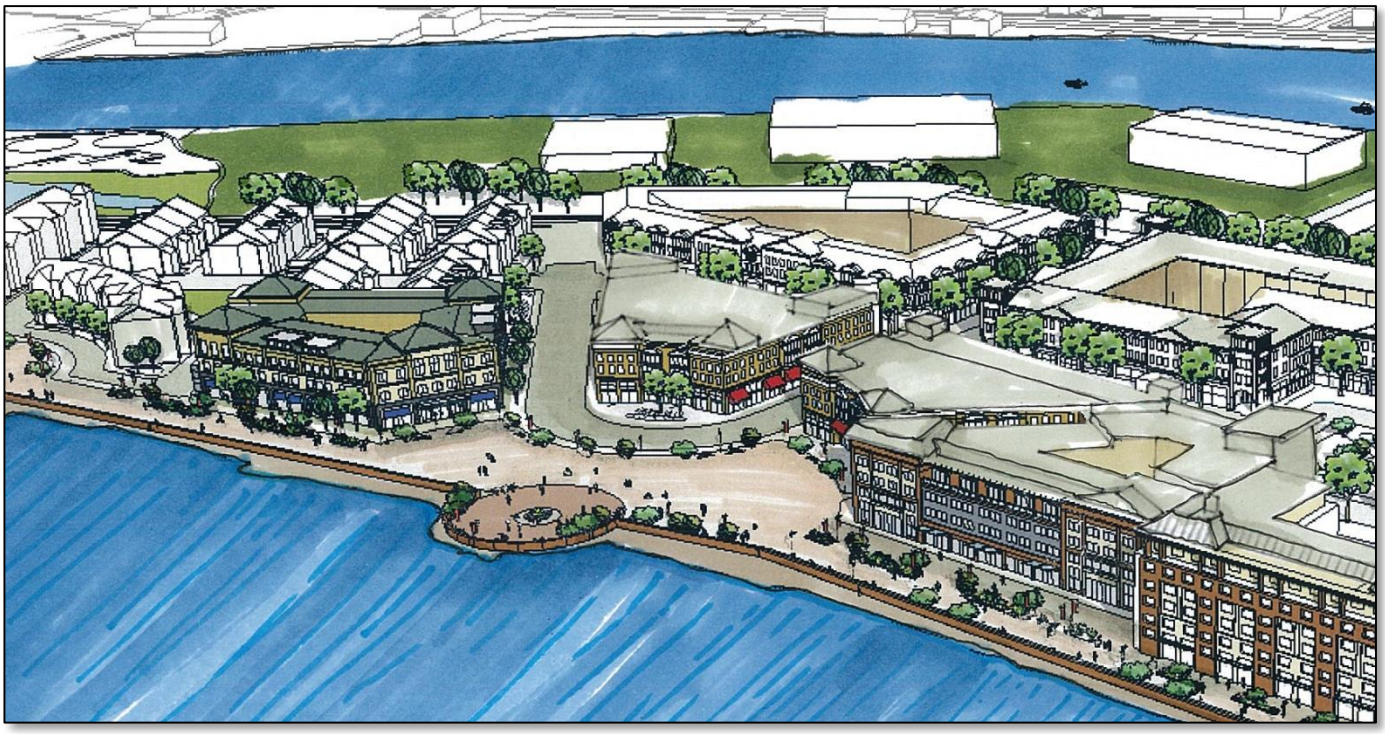


***Figure 7:*** *Mixed-use development on Tonawanda Island, with a central focus on leveraging the Niagara River Promenade.*

**16. River Road Reconstruction**

*Infrastructure Reinvestment*
*Public Cost: $5 - $8 million*
*Potential Funding: US DOT TIGER, US DOT STP, NYS DOT TEP, TIF*

As part of the BOA Step 3 Implementation Strategy, an engineering and design study is proposed to investigate pedestrian safety, motorist safety and aesthetic improvements. It is currently suggested that any future transformation of River Road should include a narrower cross section and the addition of regularly spaced shade trees, and possibly a central median. The areas north of Wheatfield Street and south of Thompson potentially present a good opportunity for narrowing based upon traffic volumes and should be evaluated in a future study. The most important component of the redevelopment of this corridor is the improvement of pedestrian connectivity between adjacent neighborhoods and the waterfront.

Potential funding sources for this project include the USDOT Transportation Investments Generating Economic Recovery (TIGER) program, and the Surface Transportation Program (STP). Funding for the STP is controlled by the Greater Buffalo-Niagara Regional Transportation Council, and this agency should be consulted during the Step 3 Implementation Strategy to ensure continued support from the state and federal level. A similar project was conducted in Monroe County, NY for the reconstruction of former I-590, which was converted into a locally-controlled street to improve both function, safety and aesthetics within the community. See Figure 8 for potential improvements at corridor intersections.



*Seabreeze Drive was significantly reduced in roadway cross section, and included sidewalks, a multiuse trail, and a central median.*



***Figure 8**: View of River Road with proposed enhanced crosswalks, street trees, and a central median where possible to reduce the overall scale and impact of the roadway corridor.*

### 17. Industrial Infill Redevelopment & Access

*Private Development*

Existing industrial and recycling land uses along River Road are envisioned to transition to low-intensity industrial and manufacturing activity in a business park environment. The development of an internalized loop-road has the potential to reduce the number of curb-cuts along the roadway and improve corridor safety, while also increasing the buffer distance between industrial uses and the corridor, as seen in Figure 9.

### 18. Mixed-Use Redevelopment

*Private Development*

The area bounded by Main Street, River Road, and Island Street is recommended to undergo redevelopment that provides a positive influence on the northern extent of downtown North Tonawanda. This location serves as a gateway to both downtown and Tonawanda Island, and is envisioned to be transformed into a mixed-use node with office and/or retail space on the ground floor, with upper-story residential units (See Figure 10).




***Figure 9:*** *Industrial development along River Road should be transitioned over time to low-impact businesses that will have a positive influence on the City's primary northern gateway corridor.*



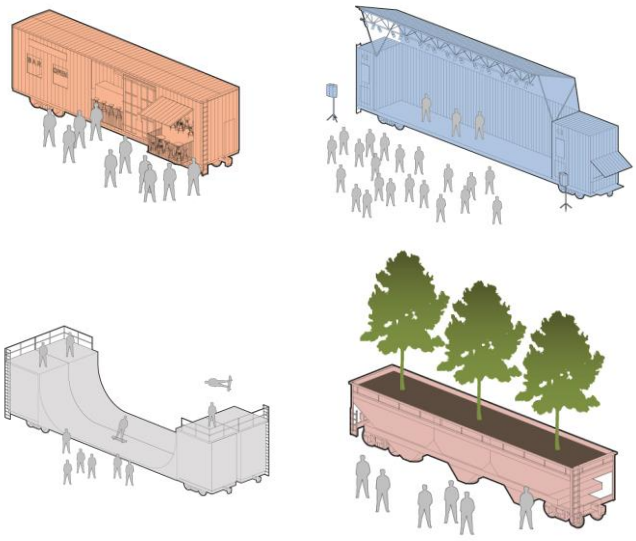

***Figure 10****: Development at the Island Street, Main Street and River Road triangle should act as a welcoming gateway to both downtown and Tonawanda Island*

**19. Rail Park and Interpretive Center**

*Public Realm Improvement*
*Public Cost: $500,000*
*Potential Funding: Private, NYS Parks EPF, Niagara River Greenway*

The concept for this new recreational space includes the development of a flexible system of educational, recreational, interpretive and performance spaces located on converted rolling stock. Repurposed former rail cars take on new roles as play equipment, performance spaces, interpretive exhibits, retail and dining space and artist galleries. A new Rail Museum and Interpretive Center would relocate the Railroad Museum of the Niagara Frontier on Oliver Street, and include new exhibit space. This unique destination would celebrate the importance of rail development in the City's history, while serving to draw visitors from throughout the region (Figure 11).

This distinctive attraction would further the City's goal of providing family-oriented activities, and could also be targeted to those traveling to Niagara Falls. Rail Park admission revenue could be used to off-set museum and interpretive center operations costs, while corporate donations and advertising opportunities could also assist in funding exhibits.



*Rail cars of all shapes and sizes could be repurposed to include performance space, retail or vending operations, educational, interpretive, recreation or landscaping environments.*



***Figure 11:*** *The Rail Park concept would be unique to North Tonawanda and would further the City's identity as a historic, yet innovative community.*

**20. Thompson Street Improvements**

*Infrastructure Investment*
*Public Cost: $150,000*
*Funding Sources: US Federal Railroad Administration, Congestion Mitigation and Air Quality (CMAQ), NYS DOT STP, NYS DOT Transportation Enhancements Projects (TEP)*

Thompson Street functions as the primary gateway corridor to Tonawanda Island from the east. This roadway segment requires significant pedestrian and aesthetic enhancements to improve connectivity and safety between Oliver Street and Main Street. Improvements should include sidewalks, landscape plantings, and enhanced crossing aids for pedestrians, as seen in Figure 12.

**21. Weatherbest Slip Redevelopment**

*Public Realm Improvement*
*Public Cost: $1 million*
*Funding Sources: NYS Parks EPF, NYS LWRP, NYS Parks Recreational Trails*

The future of this area in envisioned to include public access to the waterfront, open space, and public amenities such as a community building and waterfront plaza. A proposed trail connection underneath the River Road Bridge to the canal and Sweeney Street should be investigated for feasibility. Such a trail connection would link Gratwick Riverside Park and Gateway Harbor Park with a continuous multi-use trail. The remainder of the area should continue to be accessible by boat and car, although the facility should not include significant parking accommodations. The primary use of this area should be for passive recreation and the enjoyment of the Erie Canal waterfront.




***Figure 12****: The above depicts a simulation of improvements at the railroad crossing at Ward Road, which is similar to Thompson Street. A series of these improvements should be made to all six at-grade crossings between downtown and the City boundary.*

**22. Downtown Mixed-Use Infill Development**

*Private Development*

*Funding Sources: NY Main Street, NYS ESDC*

Infill development projects in the portions of downtown North Tonawanda east of Webster Street will build upon successful investments in both the Remington Lofts project and the proposed parking structure. Previous investments provide the momentum for additional infill development that seek to increase the 24-hour population in the downtown core via new mixed-use residential projects that maximize the density of these currently underutilized portions of the City.




*The above picture depicts a curb extension which allows for the inflow of storm water runoff.*

**23. Main Street Pedestrian Enhancements**

*Public Realm Improvement*

*Public Cost: $250,000 to $400,000*

*Funding Source: NYS Environmental Facilities Corporation Green Innovations Grant Program*

Main Street recently underwent a major reconstruction, with the inclusion of new curbing, tree lawn, lighting and street trees. Additional recommended improvements to Main Street include the provision of curb bump-outs at primary intersections, wayfinding and interpretive signage, benches, and public art. The roadway remains extremely wide for the limited amount of traffic received. The narrowing of the pavement surface would provide space for green infrastructure and storm water management techniques such as bio retention areas and rain gardens. This infrastructure would improve the function and aesthetics of the corridor, and provide it with a unique identity separate from Webster Street.

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Map designed by: Bergmann Associates

1. Gratwick Park Redevelopment Phase 2
2. Tonawanda Island Internal Roads, Central Park, Mixed-Use Buildings & Phase 2 Townhouses
3. River Road Reconstruction
4. Industrial Infill & Redevelopment & Access Management
5. Mixed Use Redevelopment
6. Interpretive Train Park & Museum
7. Oliver Street Park
8. Weatherbest Redevelopment
9. Downtown Mixed-Use Infill Development
10. Main Street Reconstruction

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 19**
**Overall Masterplan**
**PHASE 2**

### 4.4.4 Phase III: 15 + years

Phase III development projects are likely not feasible without the previous investments and momentum generated by Phases I and II. A total of eight projects are included in the final phase of the BOA Master Plan, as depicted on Map 20. Map 16 provides an illustration of all three phases and 31 recommended projects in an overall Implementation Phasing Plan.

**24. Gratwick Riverside Park Phase 3**

*Public Realm Improvement*
*Public Cost: $5-$8 million*
*Funding Source: Niagara River Greenway, NYS Parks EPF, NYS LWRP*

The continued redevelopment of Gratwick Riverside Park includes the relocation of the primary loop road away from the waterfront and the development of the waterfront promenade. Future phases of the Park's development also include the construction of the Gratwick Community Room and band shelter to provide a formalized venue for events and activities.

**25. Residential Condominiums**

*Private Development*

Future development of high-value waterfront housing should be concentrated on Tonawanda Island and the Little River. Additionally, the redevelopment of existing marina and waterside sites should maintain, where appropriate, ground floor uses that are water-enhanced, open to the public and include the provision for public access with the development of a waterside trail system.

**26. Mixed-Use with Structured Parking**

*Private Development*

The completion of residential development on Tonawanda Island includes several infill projects on temporary parking lots constructed during previous phases. The structures are envisioned to be three to four stories, with lower-level parking and upper story residences.

**27. Hotel**

*Private Development*

The final phase of hospitality services development on Tonawanda Island includes an expansion of the Phase 1 hotel and residential mixed use structure, and provides for the addition of a second, separate structure. Together, these two buildings define the waterfront plaza and provide a high quality public realm along the Niagara River. This development project will be the capstone investment on Tonawanda Island, and will leverage all previous public and private investments.



*The condominium development shown above is attached to the Hampton Inn in Saratoga Springs, New York.*

**28. Townhomes and Oliver Street of Shoppes**

*Private Development*

The development of townhomes and enhanced commercial/retail services at the intersection of Oliver and Thompson Streets provides a strong anchor to the northeast corner of the Downtown Central Business District Character Area. Townhomes are proposed internal to the site, while mixed-use, multistory development flanks the street frontage and strengthens the urban form of the intersection. The redevelopment of this intersection is a central feature of the revitalization strategy for Oliver Street, and was included in the City's Downtown Redevelopment Plan (Figure 13).

**29. Enhanced Oliver Street Gateway**

*Public Realm Improvement*

*Public Cost:$250,000 to $650,000*

*Funding Sources: NYS Parks EPF, NYS DOT TEP*

As part of the phased redevelopment of the Oliver Street corridor, a major gateway opportunity is present at the current terminus of the Heritage Park trail. The unique, mid-block gateway feature may include a raised table trail crossing, enhanced paving materials, aesthetic lighting, street trees, and potentially a public art structure that spans the corridor. In addition, the historic railroad switching tower sits directly adjacent to this area and should be utilized as part of the gateway. Public funding may be attainable via the NYS Parks EPF Historic Preservation program to restore the switching tower, which could leverage other funding sources to make gateway improvements feasible (Figure 13).




***Figure 13:*** *The Oliver Street mixed-use development and gateway would provide a focal point and destination within the corridor.*

**30. Mixed-Use Housing and Municipal Parking Lot**

*Private Development / Infrastructure Investment*
*Funding Source: NY Main Street*

The area bounded by River Road, Backer Alley, Goundry Street, and Island Street is proposed to undergo a major transformation from industrial uses to a mixed residential/commercial node, complete with centralized parking. The redevelopment of this block relocates surface parking from Manhattan Street, and bolsters the urban form of both Island Street and Goundry Street through mixed-use, multistory frontage development. Proposed uses include business services, office, retail, and upper story residential.

**31. Manhattan Street Mixed-Use & Parking Structure**

*Private Development*
*Public Cost: $15 to $20 million*
*Funding Sources: NYS ESDC, Public Bond, TIF*

The culminating development project of the BOA revitalization strategy is the construction of a large, multistory parking structure and accessory mixed-use buildings along Manhattan Street. A direct connection from this development to Webster Street is envisioned, linking the City's historic core with an abundant supply of parking. Attached to the parking structure would be larger-tenant retail space and top-floor condominiums with views of the Niagara River. This development project would define Goundry Street as the primary gateway to downtown from River Road, and would strengthen the sense of arrival into the City from the south. Funding sources for this project will likely include significant private investment, though public monies will likely be required to make the parking structure feasibly. There is the potential to partially fund the parking structure through the presale of residential condominiums and long-term leasing arrangements with nearby anchor tenants and/or first floor retail tenants within the parking structure.

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1. Gratwick Park Redevelopment Phase 3
2. Residential Condominium
3. High Density Residential
4. Mixed Use with Structured Parking
5. Hotel Phase 2
6. Town Homes & Oliver Street of Shops
7. Enhanced Oliver Street Gateway
8. Mixed-Use Housing & Municipal Parking Lot
9. Manhattan Street Mixed-Use & Parking Structure

Map prepared by: Bergmann associates

# North Tonawanda Brownfield Opportunity Area

## Nomination Study

*This effort was made possible with the guidance and financial assistance provided by the NYS Department of State Brownfield Opportunity Area Program.*

**MAP 20**
**Overall Masterplan**
**PHASE 3**

# 4.3 DEVELOPMENT RECOMMENDATIONS

As presented in Section 1.4 of the BOA Plan, the future of the study area is guided by a series of 10 principles to inform and direct decision-making and future investments. Each principle is supported by recommendations drawn from public input, the steering committee, project stakeholders, and City staff. The successful revitalization of the BOA will, in large part, be based upon the ability of the City, investors, and project stakeholders to consider these principles as part of future development and investment. The recommendations developed to support these principles include policy and non-capital initiatives, as well as capital projects and regulatory changes. Non-capital projects are intended to support economic development and the required investments that are pre-cursors to the recommended capital projects discussed further in Section 4.4.

The following section provides a brief summary of the 10 principles against which all future projects and initiatives within the BOA study area should be considered as part of the decision-making process. Specific recommendations supporting each of the guiding principles are summarized in Tables 17-24, which includes the entity responsible for leading the initiative and a proposed timeline for completion.

The City should strive to address short-term and on-going initiatives over the course of the next 5 years. Mid- and long-term timeframes will continue to evolve as progress is made in the BOA study area.

A summary of the priority, short-term recommendations for the BOA study area are summarized in the following checklists:

### Short-Term **Capital Project Recommendations**

- ❑ Provide continuous public access along the western Niagara River shoreline on Tonawanda Island via the construction of a waterfront promenade.
- ❑ Incorporate interpretive signage and historical information into a comprehensive wayfinding program.

### Short-Term **Regulatory Modifications**

- ❑ Change zoning classifications and districts along the waterfront to permit a variety of water dependent and water enhanced uses.
- ❑ Create design guidelines for new waterfront development to improve public access and the quality of the public realm.
- ❑ Update the City's zoning code to promote mixed use development in the downtown, including a greater diversity of residential development. Consider incorporating design standards to create a consistent aesthetic.
- ❑ Implement façade design guidelines to ensure new investment enhances existing building character and retains historic integrity.
- ❑ Update the City's Waterfront Zoning District and Downtown Districts to promote the land uses and design aesthetics identified in the BOA Plan.
- ❑ Ensure that live-work alternatives are permitted and promoted within the BOA, including home-based businesses and live-work units.
- ❑ Require public access paths, trail, overlooks and/or promenades along all future waterfront development projects on Tonawanda Island.

## Short-Term **Policy / Planning Recommendations**

- ❑ Study alternatives for land assembly to facilitate redevelopment projects on Tonawanda Island.
- ❑ Develop a program to incentivize the development of upper story real estate into residential units in the downtown, especially along Webster Street.
- ❑ Conduct an analysis and assessment of housing needs to be developed over next 10-15 years.
- ❑ Identify additional year-round events, facilities and programs in the downtown that focus on family-oriented and kid-friendly activities.
- ❑ Prepare a corridor study for River Road to address negative impacts associated with current design and configuration.
- ❑ Identify an attractive marketing brand for the City that can be used comprehensively in marketing, advertising and promotional campaigns.
- ❑ Investigate the feasibility of narrowing River Road north of Wheatfield Street to create a parkway setting.
- ❑ Study the feasibility of providing pedestrian access to Tonawanda Island with by improving Durkee Bridge or creating a new pedestrian-only bridge across the Little River.
- ❑ Identify sites eligible for site assessment funding through the BOA program and submit requests for funding.
- ❑ Coordinate with local and regional economic development agencies to identify opportunities for establishing a local tax incentive program to spur redevelopment on previously contaminated sites.
- ❑ Assemble a BOA Working Group composed of local leaders, property owners, business leaders and City staff to spearhead implementation efforts.
- ❑ Complete a Generic Environmental Impact Statement for the full build-out of the BOA Master Plan to streamline the approvals process for potential investors and property owners.
- ❑ Complete financial feasibility assessments for catalytic projects on strategic sites within the BOA, to include pro formas and developer request for proposals.
- ❑ Identify one to three short-term projects to be completed and announce kick-off as part of Mayor's State of the City address to showcase forward progress for the City.
- ❑ Coordinate the inclusion of North Tonawanda in promotional materials for the Buffalo-Niagara region.
- ❑ Coordinate with Niagara County Tourism to identify unique day trips to North Tonawanda and other ways to capitalize on attracting visitors from Niagara Falls.

## SUMMARY OF BOA PRINCIPLES

### *1: Make The Waterfront A Destination*

North Tonawanda's waterfronts and adjacent upland areas must provide well-defined locations for people to visit and experience.

### *2: Offer A Dynamic Urban Experience*

Development trends have shifted, and more families and businesses desire to be close to goods, services and a dynamic setting that offers a range of activities within a walkable setting.

### *3: Promote Diversity In Land Use*

The BOA study area includes a range of land uses, including industrial, commercial and residential. This diversity is required to create a 24-hour city that supports the local tax base, provides jobs, responds to visitors needs, fosters small business and provides options for residential living.

### *4: Identify New Uses For Infrastructure*

The City's industrial heritage has left it with infrastructure investments in utilities and transportation corridors that are oversized and underutilized. North Tonawanda should identify opportunities to utilize the excess capacity to leverage redevelopment.

### *5: Celebrate Our History And Culture*

North Tonawanda's history and culture must remain an important part of the community identity and be incorporated into future marketing and branding strategies to attract residents, visitors, and investors.

### *6: Design For People, Not Just Cars*

The River Road corridor and surrounding lands have been largely designed to cater to the automobile and railroad, with few areas safe or attractive to pedestrians outside of the downtown core. The City recognizes the value of supporting pedestrian circulation within the public realm and considering pedestrian access as of equal importance to the movement of cars and trucks.

### *7: Advance Environmental Clean-Up*

The perceptions associated with brownfields are directly tied to the notion that many of the sites may be contaminated and as a result, underutilized. Remediation and enhancement of key brownfield sites in the BOA study area will improve overall community health, increase property values, foster economic development opportunities, and instill a sense of pride.

### *8: Work Collectively And Cooperatively (Public and Private)*

Coordination amongst public and private entities is integral to the successful implementation of BOA recommendations. The City should spearhead the creation of broad partnerships and collaborative agreements among a wide range of parties, including state agencies, regional organizations, local property owners, local business owners, prospective investors and residents.

### *9: Identify Projects That Build Momentum*

The revitalization and redevelopment of the BOA will be a long process requiring close coordination of public and private stakeholders. Small projects should be completed quickly to show progress and maintain momentum.

### *10: Define And Market A Unique Identity*

The branding and marketing strategy for the BOA must overcome negative perceptions associated with study area and portray the opportunities and potentials of the City, the BOA, and specific sites in a desirable perspective.

*Table 17*

| | Principle and Recommendations | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **1** | **Make the waterfront a destination.** | | | |
| A. | Provide continuous public access along the western Niagara River shoreline on Tonawanda Island via the construction of a waterfront promenade. | Capital Project | Private | Short-Term |
| B. | Continue to implement the recommendations of the Gratwick Riverside Park Master Plan. | Capital Project | City | On-Going |
| C. | Change zoning classifications and districts along the waterfront to permit a variety of water dependent and water enhanced uses. | Regulatory Change | City | Short-Term |
| D. | Create design guidelines for new waterfront development to improve public access and the quality of the public realm. | Regulatory Change | City | Short-Term |
| E. | Investigate the provision of tourism passenger boat service out of Tonawanda Harbor. | Policy / Action | City / Private | Medium-Term |
| F. | Require public access paths, trail, overlooks and/or promenades along all future waterfront development projects on Tonawanda Island. | Regulatory Change | City / Private | Short-Term |
| G. | Require any new development on the west side of River Road to provide public access to the water or to incorporate some element of public improvement. | Regulatory Change | City / Private | On-Going |
| H. | Study alternatives for land assembly to facilitate redevelopment projects on Tonawanda Island. | Policy / Action | City | Short-Term |
| I. | Ensure consistency with the City's 2010 Local Waterfront Revitalization Program. | Policy / Action | City / Private | On-Going |

*Table 18*

| | Principle and Recommendations | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **2** | **Offer a dynamic urban experience.** | | | |
| A. | Develop a program to incentivize the development of upper story real estate into residential units in the downtown, especially along Webster Street. | Policy / Action | City | Short-Term |
| B. | Provide boater comfort and convenience services at the interface between downtown and the canal to promote visitor exploration. | Capital Project | City | Medium-Term |
| C. | Implement design improvements and aesthetic enhancements to River Road, within the proximity of the downtown core, to promote walkability by fostering a safe and welcoming environment. | Capital Project | City | Medium-Term |
| D. | Update the City's zoning code to promote mixed use in the downtown, including a greater diversity of residential development. Consider incorporating design standards to create a consistent aesthetic. | Regulatory Change | City | Short-Term |
| E. | Increase the number of people living in the Downtown Central Business subarea by 50 percent over the next 10 years by developing more residential units. | Policy / Action | City | Long-Term |
| F. | Implement façade design guidelines to ensure new investment enhances existing building character and retains the historic integrity. | Regulatory Change | City | Short-Term |
| G. | Conduct an analysis and assessment of housing needs within the City to identify attractive and marketable housing types to be developed over the next 10-15 years, and opportunities for demolition, land assembly and rehabilitation. | Policy / Action | City | Short-Term |
| H. | Identify additional year-round events, facilities and programs in the downtown that focus on family-oriented and kid-friendly activities. | Policy / Action | City | Short-Term |

*Table 19*

| | Principle and Recommendations | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **3** | **Promote diversity in land use.** | | | |
| A. | Update the City's Waterfront Zoning District and Downtown Districts to promote the land uses and design aesthetics identified in the BOA Plan. | Regulatory Change | City | Short-Term |
| B. | Target Tonawanda Island, the Little River waterfront, and downtown as primary mixed use nodes. | Regulatory Change | City / Private | On-Going |
| C. | Ensure that live/work alternatives are permitted and promoted within the BOA, including home-based businesses and live/work units. | Regulatory Change | City | Short-Term |
| **4** | **Identify new uses for infrastructure.** | | | |
| A. | Create aesthetically pleasing and welcoming gateways at primary intersections consistent with the City's Downtown Wayfinding Plan. | Capital Project | City | Medium-Term |
| B. | Identify potential areas for a 'Rail Park' that creatively utilize existing rails and rolling stock as interpretive, educational, and recreational pieces. | Capital Project | City / Private | Medium-Term |
| C. | Investigate alternative sources of energy to heat and cool buildings. Potential sources may include the Niagara River and the waste water treatment plant. | Policy / Action | Varies | Long-Term |
| D. | Utilize abandoned railroad and street rights-of-way for trails, improved pedestrian connectivity, and expanded recreational amenities. | Capital Project | City | On-Going |
| E. | Prepare a corridor study for River Road to address negative impacts associated with its current configuration and design. | Policy / Action | City | Short-Term |

*Table 20*

| | Principle and Recommendations | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **5** | **Celebrate our history and culture.** | | | |
| A. | Identify an attractive marketing brand for the City that can be used comprehensively in marketing, advertising and promotional campaigns. | Policy / Action | City/ Tourism Agencies | Short-Term |
| B. | Ensure programs and special events are coordinated among existing organizations and facilities, including Lumber City History Museum, the Railroad Museum of the Niagara Frontier, the Herschell Carrousel Factory Museum. | Policy / Action | City / Tourism Agencies / Local Organizations | On-Going |
| C. | Kick-off a public art campaign that focuses on historical events, activities and people important to the history of North Tonawanda, and incorporate art pieces into streetscapes and public gathering areas. | Policy / Action | City / Art Organizations | Medium-Term |
| D. | Capitalize on the Canal as an important historic, cultural and recreational asset. Market the resource to visitors and potential investors as a strategic business development opportunity. | Policy / Action | City / NYS Canal Corporation / Local Businesses | On-Going |
| E. | Incorporate interpretive signage and historical information into a comprehensive wayfinding program. Create kiosks and interpretive stations along pedestrian walkways, trails and in public gathering spaces. | Capital Project | City | Short-Term |
| F. | Continue to identify historic buildings and structures and assist with their preservation and protection. | Policy / Action | City / Preservation Organizations | On-Going |
| G. | Develop historic design guidelines for the downtown core to ensure existing historic fabric is preserved and protected. | Regulatory Change | City | Medium-Term |
| H. | Conduct Phase IA and Phase IB archeological resource assessments to improve the understanding of important archeological resources worthy of preservation and protection during BOA redevelopment activities. | Policy / Action | City / Property Owners | Medium-Term |
| I. | Consider enhancing the City's logo with a more contemporary design that appeals to both the community's history and future. | Policy / Action | City | Medium-Term |

*Table 21*

| Principle and Recommendations | | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **6** | **Design for people, not just cars.** | | | |
| A. | Investigate the feasibility of narrowing River Road north of Wheatfield Street and South of Main Street and creating a parkway setting. | Policy / Action | City / County | Short-Term |
| B. | Install pedestrian improvements at all intersections, including cross walks, lighting, and sidewalks. | Capital Project | City | On-Going |
| C. | Study the feasibility of providing pedestrian access to Tonawanda Island either by improving Durkee Bridge or creating a new, pedestrian only bridge across the Little River. | Policy / Action | City | Short-Term |
| D. | Implement trail enhancements to the existing River Road trail system to make the trail safer and more user-friendly. Recommendations for enhancements, as identified in the LWRP, include creating a stronger buffer between the trail and River Road and installing pedestrian amenities. | Capital Project | City | On-Going |
| E. | Coordinate with the City of Niagara Falls to identify opportunities for expanding their existing trolley system into the City of North Tonawanda. | Policy / Action | City / Niagara Falls | Medium-Term |
| F. | Provide alternative transportation options for visitors, such as human-powered-vehicle rentals, for use by boaters and visitors upon docking at Gateway Harbor Park. | Policy / Action | City / Private | Medium-Term |
| G. | Create engaging urban spaces and locations for public gathering to create a welcoming and interested street presence. | Capital Project | City / Private | On-Going |

*Table 22*

| | Principle and Recommendations | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **7** | **Advance environmental cleanup.** | | | |
| A. | Identify sites eligible for Site Assessment funding through the BOA Program and submit requests for funding. | Policy / Action | City / BOA Partners | Short-Term |
| B. | Coordinate with local and regional economic development agencies to identify opportunities for creating a local tax incentive structure to spur redevelopment on previously contaminated properties. | Regulatory Change | City / Economic Development Agencies / County | Short-Term |
| **8** | **Work collectively and cooperatively.** | | | |
| A. | Develop a promotional campaign with area media outlets that rewards noteworthy community investments with limited-time free advertising and media recognition. | Policy / Action | City / Media / Investors | On-Going |
| B. | Seek grant and philanthropic funding to strengthen the local Merchants Association. | Policy / Action | City / Merchants Association | On-Going |
| C. | Consider the opportunities associated with the formation of a Business Improvement District. | Policy / Action | City / Local Businesses | Medium-Term |
| D. | Continue to update and improve the BOA webpage, linked from the City's website, to showcase BOA projects and implementation success. | Policy / Action | City | On-Going |

*Table 23*

| Principle and Recommendations | | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **9** | **Identify projects that build momentum.** | | | |
| A. | Assemble a BOA Working Group composed of local leaders, property owners, City staff, and business leaders to spearhead implementation efforts. | Policy / Action | City / Local Volunteers | Short-Term |
| B. | Complete a Generic Environmental Impact Statement for the full build-out of the BOA Master Plan to streamline the approval process for potential investors and property owners. | Policy / Action | City | Short-Term |
| C. | Complete financial feasibility assessments for catalytic projects on strategic sites within the BOA, to include pro-formas, and sample developer requests for proposals. | Policy / Action | City | Short-Term |
| D. | Identify one to three projects to be completed and announce as part of the Mayor's State of the City address to showcase forward progress for City. | Policy / Action | City | Short-Term |

*Table 24*

| Principle and Recommendations | | Type | Responsible Agency | Time Frame |
|---|---|---|---|---|
| **10** | **Define and market a unique identity.** | | | |
| A. | Promote the historical identity of the City's lumber, industrial and manufacturing past, yet continue to market the community as place of innovation and technology. | Policy / Action | City / Tourism Organizations | On-Going |
| B. | Coordinate the inclusion of North Tonawanda in promotional materials for the Buffalo-Niagara Region. | Policy / Action | City / Tourism Organizations | Short-Term |
| C. | Coordinate with Niagara County Tourism to identify unique day-trip experiences within the City that could be promoted to Niagara Falls visitors. | Policy / Action | City / Tourism Organizations | Short-Term |
| D. | Complete and deploy a virtual model of the BOA Study Area upon full build-out of the Master Plan, to be utilized for marketing, planning, development and policy decisions regarding investment and redevelopment within the Study Area. | Policy / Action | City | Medium-Term |
| E. | Build North Tonawanda's new identity as a family- and kid-friendly destination. | Policy / Action | City / Tourism Organizations / Local Businesses | On-Going |

# 4.4 LAND USE AND ZONING RECOMMENDATIONS

A diversity of future land uses in the North Tonawanda BOA, as outlined in the master plan, will be required to leverage location and market advantages. The City's location at the confluence of the Erie Canal and Niagara River is a key driver of economic development. This unique strength should be reflected in the future land use pattern and supported by the regulatory environment.

As the BOA grows and prospers, it will become easier to attract mixed-use style development that fosters the desired connections between the downtown core and waterfronts. Building upon the existing urban form of the City, the BOA is envisioned to redevelop with a range of complementary land uses.

A wide range of land uses currently exist within the BOA. It is expected that existing land use patterns will be refined over time, and a new arrangement will promote the City's vision to strengthen the vitality and sustainability of its waterfronts and downtown core.

An analysis of existing conditions and market realities indicates the North Tonawanda BOA has the potential to support a wide range of uses. The following is a summary of future land uses as envisioned throughout the Study Area:

**Commercial and Retail Uses**

- Mixed-use
- Water-dependent commercial (marinas, etc.)
- Water-enhanced commercial (restaurants, etc.)
- Neighborhood-scale commercial
- Hospitality services (hotels, etc.)

**Residential Uses**

- Townhouses and condominiums
- Apartments

**Business and Industrial Uses**

- Professional office
- Business park
- Research and development facilities
- Flexible industrial space
- High-tech industrial
- Manufacturing

**Public Services Uses**

- Parking, structured and surface
- Recreation facilities, passive and active
- Parks, trails, and open space
- Cultural attractions
- Visitor services

The City will work with private developers to ensure each Character Area defined in the BOA (refer to Map 4) complements the development and uses planned and developed in other Character Areas. The land use patterns proposed for each Character Area seek to promote a redevelopment scenario tailored to the area's strengths, resources and existing infrastructure.

The following section provides a breakdown of suitable uses by Character Area and required zoning changes to implement the vision for the BOA.

### 4.4.1 Downtown Central Business District

***LAND USE***

The Downtown Central Business District is envisioned to be the vibrant hub of activity within North Tonawanda. The promotion and encouragement of new residential units within the downtown core will build upon the momentum created by the Remington Lofts project and provide much needed 24-hour activity and foot traffic. A mix of owner-occupied and rental units will provide a range of alternatives to meet the varied demands of the changing housing market within the region.

Development in this Character Area will be largely infill projects that complement and strengthen the existing historic context of downtown. The redevelopment of vacant lots, surface parking areas and smaller, underutilized structures should be accomplished by keeping the new structure's form, massing, scale and architectural character complementary to existing development within the downtown core.

There is significant potential for upper-story conversions and rehabilitations in numerous buildings within the downtown core. However, establishing the critical mass of residents and workers needed to create a vibrant, 24-hour district will require new construction on currently vacant or underutilized properties. New structures should strive to provide first-floor commercial/retail space with upper-story residential or office space.

To achieve the vision for this character area, new structures should range from 2-4 stories in height, and structured parking should be considered in replacement of large surface parking lots, when warranted. Along Webster and Main Streets, a build-to line should be established no greater than ten feet from the right-of-way, and side setbacks as close to zero as possible to maintain a strong street presence that is focused on the pedestrian experience.

Development adjacent to the Erie Canal should include water-enhanced uses that take advantage of a location on or near the waterfront, including restaurants and marine-related services and retail. The development and creation of more residential units adjacent to the waterfront should also be continued, as these uses support urban vitality and activity.

The following land uses are considered appropriate for the Downtown Central Business District Character Area.

- Mixed-use
- Water-enhanced mixed-use
- Neighborhood-scale commercial
- Professional office
- Hospitality services
- Townhouses and condominiums
- Apartments
- Structured parking
- Parks, trails, and open space
- Cultural attractions
- Visitor services

***ZONING***

The Downtown core of North Tonawanda is currently composed of two zoning districts: Light Manufacturing, and General Commercial. It is proposed that a new Downtown Mixed-Use zoning district be established encompassing all of the Downtown Central Business District Character Area. This new district should promote the vertical mixing of uses within structures. While many of the uses currently permitted within the existing zoning districts will be carried over into the new Mixed-Use District, several uses will be added and numerous uses prohibited, promoting

the atmosphere and urban form envisioned for the downtown core.

In particular, heavy manufacturing, materials and chemicals processing, and distribution uses should be prohibited. In addition, new billboards should be prohibited in the Downtown Central Business Character Area, and the City should investigate the creation of legal mechanisms to phase out and remove existing billboards over time. Multifamily and townhouse residential uses should be permitted throughout the district, though the construction of single-family structures should be discouraged.

The district should be bounded on the west by River Road, on the north by Thompson Street, on the south by the Erie Canal, and on the east by Oliver Street and the abandoned railroad corridor.

### 4.4.2 Tonawanda Island and Little River

***LAND USE***

Tonawanda Island and the Little River waterfront represent the City's maritime core and should continue to leverage their unique assets. Although a significant amount of industrial land use is present within this Character Area, an expansion of these uses is not recommended. Future development should include water-dependent and water-enhanced uses such as commercial, retail, accommodations, office, restaurant, residential and open space.

New development on Tonawanda Island should be pedestrian-scaled, with an urban density and built-form that promotes walkability. The architectural character of new construction on the island is envisioned to be contemporary interpretations of classic forms. However, modern and more eclectic structures may also be warranted such that they complement the unique character and identity of the island as a premiere waterfront destination in Niagara County and Western New York.

Building heights should range from 2-5 stories to retain North Tonawanda's small-city character while permitting a density that promotes activity and vitality.

Additionally, hospitality and boater services should be a primary focus for Tonawanda Island. The island is envisioned as a major destination within the City and region, and should offer accommodations, dining and other services to meet the needs of visitors and residents, alike. Existing marinas, boat dockage, and launching facilities should continue to be supported, while new development should include water-enhanced commercial uses such as bars, restaurants and marine-related retail.

Higher density multi-family housing along the northern and western shorelines will create a permanent population on the island. All residential development should provide for significant public access and amenities along the shoreline to preclude the privatization of one of North Tonawanda's greatest assets.

The following land uses are considered appropriate for the Tonawanda Island and Little River Character Area.

- Mixed-use
- Retail
- Office
- Hospitality services
- Townhouses and condominiums
- Apartments
- Structured parking
- Passive recreation facilities
- Parks, trails, and open space
- Cultural attractions
- Visitor services

***ZONING***

The entire Tonawanda Island and Little River Character Area is currently zoned Waterfront. This district only permits water-dependent maritime, industry and utility uses to be located along the shoreline, with complementary commercial uses required on an inland location. It is proposed that the name of this district be changed to Waterfront Mixed-Use, and that supporting language be developed to encourage the vertical and horizontal mixing of uses throughout the island in a manner consistent with the City's revised 2011 Local Waterfront Revitalization Plan.

The most significant changes to the regulations for this district include the elimination of limitations on the location of particular land uses. Also, the improved district language should prohibit the development of new manufacturing or industrial properties on Tonawanda Island, unless these uses represent minimal or ancillary improvements to existing active uses.

### 4.4.3 River Road Corridor

***LAND USE***

River Road plays a dual role in North Tonawanda as both a major gateway corridor that links the city to its waterfront, as well as a primary corridor for commercial/industrial access that connects to Niagara Falls. The redevelopment of this corridor should improve the quality of development, while also improving connectivity between the neighborhoods and waterfront. In addition, enhancements to the streetscape should seek to support pedestrian crossings and walkability, while retaining River Road's status as a significant commercial corridor.

Future land uses along the corridor and adjoining areas should promote public access and pedestrian connectivity, while serving as primary employment generators within the City. Land owners of existing active structures along River Road and Main Street should be encouraged to reinvest in the building exterior and improve the overall level of appearance of the property.

Land uses west of River Road along the Niagara River waterfront should be water-dependent and water-enhanced, including boater services and mixed-use developments that leverage the deep-water harbor. Waterside uses along the Niagara River should focus on attracting pedestrians, foot-traffic and economic activity through the provision of high quality outdoor congregation spaces. Land uses east of River Road should include high-tech research and development, office, light/clean industry, and general commercial. A higher standard of quality for both site design and architecture should be required of future development throughout the corridor.

Where appropriate, infill residential development along the waterfront and adjacent to the residential neighborhoods should consider multi-family and senior housing. The following land uses are considered appropriate for the River Road Corridor Character Area.

- Mixed-use
- Water-dependent
- Water-enhanced
- Multi-family residential
- Professional office
- Light Industrial and manufacturing
- High-tech research and development facilities
- Recreation facilities, passive and active
- Parks, trails, and open space
- Cultural attractions
- Visitor services

***ZONING***

The River Road Corridor Character Area is largely zoned Waterfront and Industrial, with small pockets of Neighborhood Business and General Residence zones along the eastern boundary with

the neighborhoods. It is proposed that nearly all parcels west of the active CSX railroad line be rezoned to an improved Waterfront Mixed-Use district as described for Tonawanda Island. Lands in this area should be redeveloped overtime with active commercial or industrial uses.

The new district should prohibit the expansion or introduction of new materials storage or recycling uses, as these uses should be more appropriately located further inland. The zoning boundaries for the remainder of the Character Area are proposed to remain. Minor modifications to district language for the Light Manufacturing and General Industrial zones should provide for enhanced buffer requirements between these districts and adjacent residential properties.

A small Neighborhood Business district zone is proposed to include properties fronting Wheatfield Street west of the railroad tracks, to include all parcels bounded by Wheatfield Street, River Road, the CSX railroad tracks, and the Sommer Street right-of-way extension. This area is envisioned to provide a strong connection across the railroad tracks by permitting an enlarged area for mixed-use development that can provide support services for the adjacent neighborhood. The smaller scale of development in this mixed-use node will also break up the scale of development along the corridor.

### 4.4.4 Buffalo Bolt Business Park

***LAND USE***

The Buffalo Bolt Business Park is envisioned to focus on light industrial, manufacturing, professional office and retail land uses. The Business Park is intended to serve as an employment center with a small element of neighborhood service. Pedestrian-friendly transitions between the Business Park and adjacent residential areas will be incorporated as future development occurs. The surrounding properties along Oliver Street are appropriate for neighborhood-scale commercial and retail establishments that can service employees within the Business Park and surrounding neighborhoods.

The following land uses are considered appropriate for the Buffalo Bolt Business Park Character Area.

- Neighborhood-scale commercial
- Flexible industrial space
- Business park
- Professional office
- High-tech industrial
- Research and development facilities
- Light Industrial and manufacturing

***ZONING***

There are no proposed changes to the existing zoning district boundaries or designation for the Buffalo Bolt Business Park to implement the BOA Master Plan. However, a significant number of uses currently permitted in the General Industrial zone are not appropriate for the Business Park, including: auto-wrecking and dismantling; junk-yards and scrap metal yards; dumps and slag piles; concrete mixing plants; coal yards; and the processing or treatment of bituminous products. The above uses are not complementary to the intended business park atmosphere as identified in past planning efforts and the BOA Nomination Study.

### 4.4.5 Gratwick Waterfront

***LAND USE***

The Gratwick Waterfront includes the existing Gratwick Riverside Park and the adjacent inactive marina facility. Future land uses within this area should continue to foster the development of Gratwick Riverside Park as a regional open space, recreation destination, and gateway within the Niagara River Greenway. The 2010 Marina

Feasibility Study recommends that the adjacent marina be redeveloped with water-enhanced commercial uses such as a restaurant and/or banquet facility. This type of use would be complementary and beneficial to the adjacent open space and recreational uses at Gratwick Riverside Park. The continued implementation of the Gratwick Park Master Plan includes the development of several structures to provide meeting space and revenue generation opportunities for the City.

The following land uses are considered appropriate for the Gratwick Waterfront Character Area.

- Water-dependent
- Water-enhanced
- Recreation facilities, passive and active
- Parks, trails, and open space
- Cultural attractions
- Visitor services

***ZONING***

There are no proposed changes to the existing zoning for the Gratwick Waterfront to implement the BOA Master Plan.

## 4.4.6 Interim Land Uses

The redevelopment of the BOA will not happen overnight. The large-scale redevelopment envisioned for the BOA Study Area and identified in Section 4.4 will occur progressively over the course of the next 20-plus years. Gradually, higher value land uses within each of the Character Areas will replace existing uses as property becomes available for redevelopment. It is anticipated that several existing land uses not recommended for expansion will continue within the BOA for the foreseeable future. However, upon future redevelopment, these parcels should be transitioned to the proposed uses as stated within the Nomination Study.

In addition to the redevelopment of exiting underperforming properties, there are likely numerous instances where the most appropriate and economically viable use of a property may not be achieved through initial reuse or redevelopment. For example, the significant development recommended for Tonawanda Island will take place in phases over many years. The temporary or short-term utilization of land for support services, such as parking, may be appropriate as an interim use prior to the development of structured parking to permit an increase in development density.

The redevelopment and revitalization of the BOA will also require an appropriate phasing program and strategic approach to capital investments. Initial investments made within the study area must act to improve the economic climate and expected financial return for subsequent investments. For example, the redevelopment of Tonawanda Island will require numerous smaller strategic investments in adjacent properties or infrastructure that sets the stage for larger influxes of capital.

A private developer is not expected to make a significant investment on Tonawanda Island only to be surrounded by existing uses and development that diminishes the appeal and success of their efforts. Therefore, the investment and redevelopment of properties along the gateway approach at the intersection of Thompson Street and River Road, or the redevelopment of the former Fire Training Facility, should precede significant development on the island.

Future redevelopment efforts will build upon the foundation and framework of success created by these initial critical investments. Furthermore, the current economic climate within the City and region cannot support or absorb growth beyond a handful of development efforts in any given year. However, as the revitalization effort gains traction and momentum, interest will grow in and spur the continued implementation of the BOA Master Plan.

# 4.5 FUNDING

Funding for BOA Master Plan initiatives will come from a host of public and private resources. Timing and levels of investment will be predicated on numerous issues beyond the control of City staff, including the disposition of State and Federal budgets and the regional and national economic outlook. In addition, the availability of financing and the costs of investment will also dictate the extent and timing with of private sector involvement. The City will be required to marshal a consistent level of public dollars in the beginning stages of implementation in an effort to reduce private sector risk and lure investment.

Therefore, the City should seek to identify 'low-hanging fruit' - projects that can be accomplished in the short-term with limited funding and providing maximum impact. The identification and implementation of a few highly visible quick-wins – such as the redevelopment of the Tonawanda Island Fire Training Facility site - will signal commitment, activity, and momentum that should translate into continued public and private investment. Funding for these lower cost, high impact projects can come from more traditional sources, such as the New York State Environmental Protection Fund, New York Main Street Program, and Community Development Block Grants.

Many projects discussed will require additional investigations for financial feasibility and design alternatives. Spending for these pre-development initiatives will be dependent upon public financing and grants. These monies serve to reduce upfront risk and investment by private developers. Grant funding sources are constantly changing, with available monies becoming increasingly competitive as the State and Federal governments continue to decrease spending. The City should maximize their competitive position by leveraging the planning process and community commitment outlined in the BOA Nomination Study.

The following is a brief overview of key funding programs in existence as of 2011, and important factors for consideration during the application process.

## 4.5.1 New York State Environmental Protection Fund

The NYS Environmental Protection Fund (EPF) was created in 1996 as part of a statewide bonding initiative. This fund is utilized by two primary grant programs: the Local Waterfront Revitalization Program (LWRP); and the Parks, Recreation and Historic Preservation Program (OPRHP).

The NYSDOS administers LWRP funding, which can be utilized for waterfront improvement projects in conjunction with an approved LWRP document. The update to North Tonawanda's LWRP should place the City in a strong position to compete for these funds. Funds can be utilized to finalize the design and construction of infrastructure and shoreline improvements and other capital projects. Funding availability announcements are typically made in July of each year, with applications due in September.

North Tonawanda BOA capital projects, as depicted on Map 15, that should be competitive for this funding program include: shoreline improvements at Gratwick Riverside Park (Projects 1 and 24); Gratwick Marina improvements (Project 14); construction of the Tonawanda Island Promenade (Projects 5, 15, 27); and development of the Little River Promenade (Project 8).

The Office of Parks, Recreation and Historic Preservation (OPRHP) administers a separate EPF grant program focusing on the acquisition, preservation and construction of park and historic preservation projects. This funding program supports the purchase of property and easements, the

construction of public parks, and the preservation of historic resources and structures.

Several projects within the BOA should be a good fit for this funding program, including: Gratwick Riverside Park (Projects 1, 24); the new Pocket Park (Project 12); the new Gateway Park (Project 13); the Rail Park (Project 19); Weatherbest Slip Redevelopment (Project 21); and the Oliver Street Gateway (Project 29). NYS Parks EPF program funds are typically announced in May of each year, with applications due in September.

Funding programs associated with the EPF are extremely flexible. Applicants can utilize other local, state, federal and in-kind funds towards their dollar for dollar match, and must be capable of funding the entire project prior to requesting reimbursement.

### 4.5.2 New York Main Street Program

The New York Main Street (Main Street) Program is funded by the NYS Housing Trust Fund and administered by the Office of Community Renewal. The Main Street Program mainly supports investment in private property. The Lumber City Development Corporation has had great success is utilizing Main Street funding for façade renovations, tenant space improvements, signage, and wayfinding improvements. The LCDC should continue to seek funding for building renovation, rehabilitation and streetscape improvements via the Main Street program.

To meet the stringent requirements related to housing affordability, most successful projects will be those that concentrate on subsidized residential rehabilitations and infill development. The BOA recommends this type of development along Oliver Street, Main Street, and Webster Street (Map 15 – Projects 11, 22, 23, 28, & 30). These corridors would also be able to leverage the streetscape component of the funding program and are located within the downtown core. Funding opportunities through this program are typically announced each January, with applications due in April.

Main Street funding is also flexible, yet requires proof of committed investment by other state, federal or private sources. Similar to EPF programs, Main Street is also a reimbursement program, with varying levels of match dependent upon project type.

### 4.5.3 NYS Community Development Block Grant Program

The New York State Community Development Block Grant Program (CDBG) is also funded by the NYS Housing Trust Fund and administered by the Office of Community Renewal. The CDBG program provides funding for accessible and affordable housing, drinking water and wastewater projects, and needed public facilities. CDBG funding is available via two funding programs: Annual Competitive; and Open Round Economic Development.

#### *ANNUAL COMPETITIVE*

The Annual Competitive Round of CDBG funding can be utilized for housing rehabilitation (affordable), public facilities and public infrastructure (water/sewer only). The City should seek to access CDBG funding for infrastructure improvements on Tonawanda Island as part of the island's redevelopment strategy. During the reconstruction of Taylor Drive and Island Boulevard (Project 4), water and sanitary sewer lines should be replaced and upgraded within the public right-of-way as necessary to permit the future influx of population and capacity demand. Additionally, during any future reconstruction of River Road (Project 16), the City should also seek funding to improve and extend public water and sewer service along the corridor to the City Boundary. Annual Competitive Round funding does not require matching funds from the applicant.

***OPEN ROUND ECONOMIC DEVELOPMENT***

The Open Economic Development Round of CDBG funding can provide financial assistance directly to businesses which will result in the creation or retention of jobs. Additionally, these funds can be utilized to construct publicly owned infrastructure necessary to support the creation or expansion of a business. Similar to the Annual Competitive Round of funding, North Tonawanda should seek CDBG funding to improve infrastructure on Tonawanda Island and along River Road to facilitate private development and investment. Large water and sewer users in these locations (Projects 2, 3, 16, & 17) will likely require lengthy or expensive connections to service mainlines. The required matching funds for Open Round Economic Development Round funding varies by project type from 10 percent to 60 percent.

## 4.5.4 Other Funding Sources

Several other grant, funding and financing programs will likely be required to facilitate additional implementation projects.

- Environmental clean-up efforts are supported through the New York State Brownfield Cleanup Program which provides tax incentives.
- The US EPA's Brownfields Program provides direct funding for brownfields assessment, cleanup, revolving loans, and environmental job training. In addition to direct brownfields funding, EPA also provides technical information on brownfields financing matters.
- Transportation funding for projects associated with road reconstruction or trail development are typically available via the formalized Transportation Improvement Program process coordinated by the Greater Buffalo Niagara Regional Transportation Council or the US DOT.
- Economic development assistance is also available through the New York Empire State Development Corporation, which provides funding for municipalities and direct to the private sector through its Urban and Community Development Program, and most recently through the currently unfunded Restore New York Communities Initiative. In the past, the Buffalo-Niagara Region has fared well in competition for these funds.
- The State of New York has a Tax Increment Financing law which enables municipalities and private entities to borrow capital for significant investments and allocate the proceeds from resultant increases in property tax revenues to cover debt service. However, this law is seldom utilized in New York due to the current inability to include school tax revenues, which contribute the largest source of property taxes in most New York communities. In 2012, the State Legislature began investigating changes to this law, allowing for the inclusion of school district taxes. In North Tonawanda, approximately 50 percent of 2011-2012 combined County/City/School property taxes are generated by the City School District. The inclusion of school property taxes within a Tax Increment Financing scheme would drastically increase the opportunities to utilize this tool for economic development within the BOA.

As part of the BOA Step 3 Implementation Strategy, a refined understanding of the funding mechanism to implement key catalytic projects will be developed to spur further private investment and revitalization within the City of North Tonawanda. Continued success will require a consistent and up to date understanding of potential funding resources currently available today and those developed in the future.

# 4.6 NEXT STEPS

Upon acceptance of the North Tonawanda BOA Draft Nomination Study by the Department of State, the City can begin the third step of the BOA program to undertake implementation activities. The efforts outlined within this Implementation Strategy include those actions to be included in the final phase of the BOA process.

In its 2010 Application for Project Advancement, North Tonawanda is proposing 11 tasks as part of the implementation process that can be funded via the BOA Program. These tasks include the following:

1) Archeological Resource Analysis
2) Phase 2 Environmental Site Assessments
3) Zoning Code Updates
4) Generic Environmental Impact Statement
5) River Road Transportation Plan
6) Pedestrian Bridge Feasibility Analysis
7) Housing Needs and Market Analysis
8) Virtual BOA Marketing Program
9) Land Assemblage Recommendations
10) Market Pro Formas
11) Developer Request for Proposals
12) Project Financing and Packaging
13) Final BOA Plan

All of these tasks are intended to perform many of the pre-development efforts required prior to the involvement of the private sector. These tasks set the stage by removing common hurdles and disincentives to development of former industrial and urbanized areas.

Step 3 components begin with a focus on uncovering environmentally or culturally significant issues through the completion of an Archeological Resource Analysis and Environmental Site Assessments for targeted redevelopment properties. Efforts to streamline and minimize the regulatory and approval process include updates to the municipal zoning code, and the completion of a Generic Environmental Impact Statement for the entire BOA Study Area at full build-out. Additional studies for infrastructure improvements include investigations into River Road improvements, and the feasibility of a new pedestrian bridge to connect the mainland and island. Marketing, financing and project packaging tasks will assist in identifying the most viable and ready Phase I projects to kick-off the involvement of the private sector. Finally, the completed BOA Plan will be assembled which includes all the information from Steps 2 and 3 in a cohesive package for approval by NYS DOS, culminating over four years of planning to prepare the Study Area for revitalization.

As part of a series of next steps, the City should begin to organize select staff and stakeholders to undertake critical decision making regarding implementation projects. For example, a standing committee should be established that will take the lead on the revision of the City's zoning code. .

The City must continuously analyze the recommendations made within the BOA Master Plan and revise priorities for individual sites as conditions change. This will require regular staff involvement and oversight of the Plan's implementation. As part of this process, the City should highlight a handful of projects at the outset of each year to undertake and effectuate in a calculated manner.

Additionally, the City should utilize the Nomination Study in marketing and public relations efforts with residents, area investors, and other City, federal, and state agencies. Such an effort will help carry momentum forward into implementation projects, and may also provide additional opportunities for financial, technical, and public support.

Finally, after a period of approximately seven years, the City should revisit the BOA Master Plan and assess its recommendations for continued relevance. The most effective planning documents are those that evolve to meet the needs of the present while retaining a core vision and achievement objectives.

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# *Appendices*

## Appendix A: Community Participation Materials

## Appendix B: Economic and Market Trends Analysis

## Appendix C: Brownfield Site Profiles

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# APPENDIX A: COMMUNITY INVOLVEMENT MATERIALS

Appendix A includes a number of materials associated with community involvement and participation in association with the City of North Tonawanda BOA. Included in Appendix A are the following documents:

- Steering Committee Materials
- Public Meeting Materials
- Stakeholder Meeting Materials

# NT BOA AND LWRP FINAL STEERING COMMITTEE MEMBERS

| | |
|---|---|
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# TONAWANDA ISLAND BROWNFIELD OPPORTUNITY AREA

## STEERING COMMITTEE MEETING MINUTES • May 7, 2009

**Meeting Attendees:**

- Jim Sullivan, LCDC
- Chuck Bell, LCDC
- Andy Raus, Bergmann Associates
- Kimberly Baptiste, Bergmann Associates
- Joyce Santiago, Tonawanda Chamber of Commerce
- Joe Fonzi, NT Environmental Commission
- Amy Fisk, Niagara County Department of Economic Development

1. **Project Team Introductions**
   Andy Raus introduced the consultant team and discussed team members roles and responsibilities. Steering Committee members introduced themselves and their affiliations.

2. **Project Overview**
   Kimberly Baptiste reviewed the DOS Work Plan and key scope components associated with development of the draft nomination Study. Kimberly provided a brief overview of the Brownfield Opportunity Area (BOA) program. The timeline of the project was also discussed with an overall project schedule of approximately 16 months. The majority of work is expected to be completed in 11-12 months with remaining time associated with draft document distribution, comment periods, and the development of the final study.

   The availability of background information was discussed. Bergmann Associates was provided a copy of the County-wide brownfield study completed in 2007, as well as historical images of the site. Sanborn maps and other historical information are available at City Hall.

3. **Community Participation Plan**
   A proposed approach to community outreach was presented by Bergmann Associates which included eight steering committee meetings, four public meetings, and stakeholder meetings. Bergmann Associates suggested that a public workshop and stakeholder meetings be held early in the process to inform the public about the project and to gather initial feedback regarding the study area to assist in the development of a project vision statement, goals, and objectives.

   The next steering committee meeting date was set for July 9th, 2009 at 3:30 PM. Steering Committee meetings will be held at 3:30 PM on the 2nd Thursday of each month that a meeting is scheduled (please see project timeline for steering committee meeting months).

After the North Tonawanda Local Waterfront Revitalization Program (LWRP) project begins – tentatively in August 2009 – there may be opportunity to combine steering committee and public meetings for the two projects.

**4. Identification of BOA Boundaries**

The recommended boundaries of the BOA were discussed. As originally envisioned, the BOA study area was limited to Tonawanda Island. It was determined that there was a need to expand the study area because of the overall concept that the project should address neighborhood/community revitalization in concert with brownfield redevelopment. It was recognized that there is a clear relationship between existing brownfield sites and surrounding areas and they are mutually important in identifying a plan for redevelopment. The study area boundaries were expanded to include all land south of the Buffalo Bolt site, west of Ironton Street and Oliver Street, and north of Sweeney Street. The proposed boundaries include Tonawanda Island, River Road, and neighborhoods and development areas studied in the Downtown Redevelopment Plan and Comprehensive Plans. It is expected recommendations from these studies will be carried through to this study to ensure consistency between planning documents and to ensure planning efforts do not overlap.

Bergmann Associates will develop a revised study area map that identifies the new boundaries and identifies the total land area of the study area.

**5. Visioning Exercise**

Meeting attendees were asked to identify their vision and goals for the study area, as well as opportunities and constraints.

- High end condos on Tonawanda Island.
- Public access all around island.
- Mixed uses on island, including parkland and public access.
- Infrastructure will be an issue.
- River Road more of a boulevard to slow traffic down.
- River Road needs to be greener.
- Need a stronger relationship to the water from River Road and other properties inland.
- Current use of waterfront is awful. Strange uses on waterfront. The worst businesses are on the best land.
- Many waterfront parcels are extremely underutilized.
- Need more streetscape elements.
- Need an enhanced entrance to downtown.
- Better signage and signage standards.
- Trail along River Road needs to be upgraded.
- Public access all along waterfront needs to be improved.
- Need better mass transit.
- Considerations for green infrastructure – bioswales, etc.

**6. Next Steps**

Next steps in the process were discussed as summarized below:

- The first field visits by the consultant team would be undertaken within the next 3-6 weeks. The consultant team will coordinate with the client as appropriate.
- Second Steering Committee date set for July 9th at 3:30 PM at the LCDC office.
- Public workshop and stakeholder meetings tentatively scheduled for August 2009. These meetings will be discussed in greater detail at the July Steering Committee meeting.
- Bergmann Associates will provide an updated boundary map ASAP.
- Bergmann Associates will draft the Community Participation Plan and distribute to the Steering Committee for review and comment.

# TONAWANDA ISLAND BROWNFIELD OPPORTUNITY AREA
## STEERING COMMITTEE MEETING MINUTES ● July 9, 2009

**Meeting Attendees:**

- Jim Sullivan, LCDC
- Chuck Bell, LCDC
- Bill Davignon, Waterfront Commission
- Amy Fisk, Niagara County Department of Economic Development
- Joe Fonzi, NT Environmental Commission
- Dale Marshall, City Engineer
- Andy Raus, Bergmann Associates
- Kimberly Baptiste, Bergmann Associates

**1. Project Overview**

Kimberly Baptiste gave a quick overview of the project and provided hard copies of materials distributed at the first steering committee to new committee members.

**2. Review of BOA Boundaries**

The BOA boundaries, as identified at the first committee meeting, were discussed. Boundary maps were distributed to committee members for review and confirmation. It was suggested that the boundary line extend to the canalfront and the map will be updated to reflect this change. Justification for the boundary was shared with new committee members that did not participate in the original boundary discussion.

**3. Community Participation Plan**

Final versions of the Community Participation Plan were distributed to committee members. Two public participation efforts were discussed: Public Visioning Workshop and Stakeholder Meetings.

- It was determined that the Public Visioning Workshop should be held after Labor Day to improve participation. DeGraff Community Center was identified as the preferred location for the meeting. Chuck Bell to follow-up with the facility to see if it is available for a Public Workshop on September 17th or 24th at 7:00 PM. The presentation for this meeting was discussed and the importance of tying together all past, current, and future efforts was stressed.

- The format and number of stakeholder meetings were discussed. It was suggested that the stakeholder meetings be held after the public workshop in order to get a better feel for that appropriate meeting topics may be. It was also suggested that public workshop attendees have the opportunity to sign-up to be involved in a stakeholder meeting at the workshop.

**4. Next Steps**

Next steps in the process were discussed as summarized below:

- Bergmann to make minor changes to boundary map.
- Bergmann to begin the Community Overview and Project Overview portions of the Nomination Study.
- Bergmann to coordinate with City regarding the Public Visioning Workshop.

- Bergmann to develop presentation for Public Visioning Workshop. Draft presentation to be shared with City and Steering Committee prior to public meeting for review and comment.

# CITY OF NORTH TONAWANDA BOA AND LWRP

## SCOPING MEETING MINUTES • September 3, 2009

**Meeting Participations:**

- Amy DeGaetano, NYS DOS, LWRP Manager
- Julie Sweet, NYS DOS, BOA Manager
- Chuck Bell, LCDC
- Kimberly Baptiste, Bergmann Associates

**1. Project Team Introductions**

Conference call participants introduced themselves and discussed the current status of project contracts between the NYS DOS and City of North Tonawanda.

Julie Sweet suggested the Greg Sutton (NYS DEC) be included on future calls and that the City and Bergmann Associates should follow-up with Greg to discuss status of project, scoping meeting outcomes, and next meeting dates.

**2. Review of Work Plans**

Amy DeGaetano reviewed the Work Plan associated with the development of an LWRP Amendment for the City of North Tonawanda. Key points associated with her review are bulleted below:

- All LWRP (and BOA) documents should identify source of funds and program. This should be included in any newspaper articles, presentations, or publications. Exact wording is identified in the Work Plan.

- The City is required to attend training, though a training schedule has not yet been released. The City will be notified when schedule is available. If not training is held before the project is complete, the City will not be required to attend.

- Draft products must be submitted to DOS before payment requests.

- Written meeting summaries should be forwarded to DOS. Amy requested a final list of steering committee members be provided to her. Chuck will finalize list and forward to Amy, Julie, and Bergmann Associates.

- Bergmann raised question about the formatting of both the LWRP and BOA documents. DOS noted they like to keep documents as consistent as possible. Final document does need to be provided in a Word format. A certain amount of standardization is needed as part of the process, but graphics and images are encouraged.

- *Discussion of boundary*. Copy of map showing proposed BOA and LWRP boundaries was emailed during conference call to all participants.

- Timeline of community participation was discussed. Two committee meetings have been held in association with the BOA. Copies of the meeting minutes were forwarded to DOS. DOS should get copied on all information related to both projects to ensure Julie and Amy are kept abreast of progress for both projects.

- Scope of actual project was reviewed. Amy and Julie available throughout process. Would like to see drafts as they are produced. DOS should be included as partner throughout planning process.

- *Harbor Management Plan:* The HMP can be integrated or a stand-alone project. Chuck asked if DOS had a preference. Up to the NT but generally communities like to integrate.

- *Policies:* Original LWRP for City has 44 policies. Because this is an amendment to a LWRP, city can stick with 44 or switch to updated 13 policy version. This can be decided at a later time.

- *Land and Water Uses:* We should go through existing LWRP and cross off projects that have been accomplished. A new list of projects should then be created.

- *Implementation:* Need to include actual draft amendments to zoning, etc. Look at old consistency law and identify necessary updates. This must also be submitted with LWRP Amendment. More detail on the HMP implementation can be discussed as project progresses.

- *Actions:* This is a boilerplate section that will be provided by Amy.

- *Local Consultation*: Document and describe process and public input.

- *SEQR:* Done after draft is complete. Typically a Negative Declaration for a LWRP. Julie noted many communities complete a Generic EIS as part of the BOA.

- *Reporting:* Semi-annual reports required in December and June. Amy and Julie can assist Chuck in completing these. DOS also needs copies of the signed contracts between the City of North Tonawanda and Bergmann Associates. Chuck to provide to DOS.

- Julie briefly touched on BOA Work Plan but per previous discussions it was determined everyone was comfortable with requirements and immediate next steps.

**3. Next Steps**

- DOS asked Chuck whether there were any major updates associated with the study area:

    - No movement on island properties, though 22-acre parcel has been listed with a realtor
    - City did not apply for RESTORE this last round
    - Did apply for a downtown project (boutique hotel) with Upstate Funds – this site is in the BOA study area
    - Zoning update project they wanted to do may be on hold due to budget issues

- The following next steps will be undertaken by Bergmann Associates:

    - Update BOA timeline and send to DOS
    - Prepare LWRP project timeline and send to DOS
    - Send electronic version of Comprehensive Plan to DOS
    - Share presentation for Visioning Workshop with DOS
    - Send meeting minutes to Greg Sutton

# TONAWANDA ISLAND BOA AND LWRP

## STEERING COMMITTEE MEETING MINUTES • November 12, 2009

**Meeting Attendees:**

- Jim Sullivan, LCDC
- Chuck Bell, LCDC
- Kevin O'Connor
- Dale Marshall
- Jim Mroz
- Beverly Loxterman
- Chuck Proefrock
- Julie Sweet, NYS Department of State
- Gregory Sutton, NYS Department of Environmental Conservation
- Andy Raus, Bergmann Associates
- Kimberly Baptiste, Bergmann Associates
- Amy DeGaetano, NYS Department of State (conference call)
- Rachel Selskey, Camoin Associates (conference call)

**4. Introductions**

A quick overview of the status of the BOA and LWRP projects were provided by Bergmann Associates. A number of questions about the projects were answered related to schedules, progress, deliverables, and overlap between the BOA and LWRP.

Bergmann Associates will provide relevant background information on the projects to new committee members.

The BOA boundary was discussed. Committee members agreed that it made sense to expand the boundary to include Gratwick Park and extend to the City limits. An updated map of the study area shall be forwarded to committee members.

**5. Stakeholder Meetings**

Bergmann Associates presented preliminary ideas for stakeholder meeting topics. It was determined that the six stakeholder meeting topics would include:

- Small business owners
- Parks and recreation users
- Water-dependent businesses
- Residential / quality-of-life
- Governmental agencies
- Large business and property owners

Meeting attendees offered suggestions for people who may be well-suited to participate in each of the identified groups. A draft list of potential attendees was prepared. The lists will be refined by Bergmann and LCDC and sent out to committee members for additional consideration before invitations are formally sent out. It is anticipated that the meetings will be held the week of December 14th or in early January.

**6. Preliminary Market Analysis**

The existing conditions component of the Marketing Analysis for the BOA was distributed for committee members to review. Highlights from the report were presented during the meeting. Questions about data and sources were directed to Rachel Selsky of Camoin Associates.

**7. Brownfield, Abandoned, and Vacant Sites**

Bergmann Associates presented a map and write-up of potential brownfield, abandoned, and vacant sites within the study area. The map showed all sites identified during preliminary site research to have the potential for some level of contamination. An accompanying narrative outlined the process that will be undertaken in association with identifying brownfields and environmental concerns, including desktop research, curbside assessments, the creation of a GIS database, and the identification of strategic sites that can serve as catalysts for redevelopment.

**8. Next Steps**

Next steps in the process were discussed as summarized below:

- Curbside assessments of potential brownfield sites to be completed in December 2009.
- General field visits to be completed in December 2009.
- Community setting and project overview for BOA to be completed.
- Background information for LWRP to be obtained.
- Project website drafted and available for review. Coordination with City to get it posted is currently underway. (http://gis.bergmannpc.com/NorthTonawanda/)
- Stakeholder meetings to be coordinated for completion in December or January.
- Steering Committee #4 scheduled for January 14, 2010.

# CITY OF NORTH TONAWANDA BOA AND LWRP

## STEERING COMMITTEE MEETING MINUTES• January 14, 2010

**Meeting Attendees:**

- Jim Sullivan, LCDC
- Chuck Bell, LCDC
- Bill Davignon, Waterfront Commission
- Amy Fisk, Niagara County Department of Economic Development
- Joe Fonzi, Environmental Commission
- Beverly Loxterman, Waterfront Commission
- Dale Marshall, City Engineer
- Kevin O'Connor, Waterfront Commission
- Chuck Proefrock, Waterfront Commission
- Joyce Santiago, Chamber of Commerce
- Andy Raus, Bergmann Associates
- Kimberly Baptiste, Bergmann Associates
- Gary Flisnik, Bergmann Associates
- Julie Sweet, NYS Department of State (conference call)
- Amy DeGaetano, NYS Department of State (conference call)

**9. Introductions**

Meeting began at 3:30 PM with the introduction of a new Bergmann team member, Gary Flisnik (lead environmental engineer). The steering committee introduced themselves and identified what agency or organization they represent.

**10. Existing Conditions Overview**

Bergmann Associates provided a brief overview of existing conditions related to both the BOA and LWRP study areas. The various inventory and analysis topics that will ultimately be covered in the BOA and LWRP plans were identified.

**11. Brownfield Opportunity Area (BOA)**

Gary Flisnik presented an overview of the environmental data collection and preliminary assessments completed for properties within the BOA, including a breakdown of environmental ranking by property. The GIS database and site data sheets were also discussed. The environmental assessment is one tool and set of criteria that will be used to help determine strategic sites within the study area.

Kimberly Baptiste reviewed the proposed Character Areas, or subareas, within the BOA. These are intended to thematically delineate different areas of the BOA based on existing conditions and anticipated future projects and types of development. The steering committee agreed with the five character areas that had been proposed – Gratwick Park Riverfront, Buffalo Bolt Industrial Park, River Road Corridor, Central Business District, and Tonawanda Island / Little River. As discussed, these character areas may

be modified as the planning process moves forward, but will serve as a framework for the organization of the draft Nomination Study.

**12. Local Waterfront Revitalization Program (LWRP)**

Modifications to the existing State Coastal Boundary were recommended by Bergmann Associates. It was suggested that the modifications to the study area at the downtown core get expanded to include all of the CBD as defined in the Downtown Redevelopment Plan, as well as the current BOA boundary. This would include extending the boundary east on Thompson Street to Oliver and south on Oliver to Sweeney Street. The steering committee and DOS agreed that this seemed like a logical change. All were in agreement with extending the boundary to the municipal boundary on the east side of the City. Bergmann will modify the study area map and corresponding narrative to address points made during this discussion.

Bergmann Associates presented a summary of proposed projects from the 1988 plan, followed by a visioning / brainstorming session of new projects. A number of projects were identified by committee members for the various LWRP sub-areas which include: Niagara River Corridor, Tonawanda Island, Central Business District, Barge Canal West and Barge Canal East. These projects were documented by Bergmann Associates and will be incorporated into a draft of Section 4 of the LWRP. Committee members were asked to continue to think about projects and to contact Kimberly with any additional ideas.

Bergmann handed out copies of the LWRP Coastal Policies (44 versus 13) and asked the committee to review the policies and start to think about whether the LWRP Update should retain the original 44 format or convert to the updated 13 policy format. Policies will be discussed in greater detail at the next meeting.

**13. Next Steps**

Next steps in the process were identified and are summarized below:

- Stakeholder meetings will be held on January 20, 2010 at 5:30 PM and 7:30 PM at City Hall. Steering committee members are not required to attend, but may attend if interested.
- Next committee meeting will be held on Thursday, March 11, 2010. Draft deliverables for both the BOA and LWRP will be distributed prior to the meeting for committee member review.
- The 2nd public meeting will be scheduled for April 2010. Potential unique venues, within the BOA or LWRP study area, should be identified that could be appealing and serve as a draw for the general public.

# CITY OF NORTH TONAWANDA BOA AND LWRP

## STEERING COMMITTEE MEETING #5 • March 11, 2010

**Meeting Attendees**

- Jim Sullivan, LCDC
- Chuck Bell, LCDC
- Robert Curtis, Community Representative
- Bill Davignon, Waterfront Commission
- Amy Fisk, Niagara County Department of Economic Development
- Joe Fonzi, Environmental Commission
- Beverly Loxterman, Waterfront Commission
- Dale Marshall, City Engineer
- Jim Mroz, Waterfront Commission
- Kevin O'Connor, Waterfront Commission
- Joyce Santiago, Chamber of Commerce
- Andy Raus, Bergmann Associates
- Kimberly Baptiste, Bergmann Associates
- Rachel Selsky, Camoin Associates
- Carmen Lorentz, Camoin Associates
- Julie Sweet, NYS Department of State (conference call)
- Amy DeGaetano, NYS Department of State (conference call)

**Meeting Summary**

Meeting commenced at 3:35 PM.

1. ***Local Waterfront Revitalization Program***

Elements of the Local Waterfront Revitalization Program were discussed, beginning with a brief presentation and overview of the boundary and existing conditions findings by Bergmann Associates. Comments were taken from committee members and the DOS and will be incorporated into an updated draft of the document.

An updated version of the LWRP Proposed Projects map was presented, based on comments generated at the previous Steering Committee meeting. Minor modifications to the map were noted. The map will be updated and redistributed to the Steering Committee and DOS. The map will serve as the basis for the development of Sections 3 and 4 of the LWRP.

Bergmann Associates noted that the DOS has requested that all LWRP Updates utilize the 13 Policy format that has been established since the original LWRP was prepared. This will result in a slightly different format to the Policy section between the existing LWRP (44 policies) and the LWRP Update (13

policies), though the overarching premise of the policies remains consistent. There were no objections from the Steering Committee with regards to moving forward with this revision.

***2. Brownfield Opportunity Area Program***

Camoin Associates presented a summary of the Market and Economic Trends Analysis for the BOA, including a Tourism Analysis. The Steering Committee provided comments and asked questions which were discussed at the meeting. The project team noted that this effort was only the first layer of a more detailed economic analysis of the study area. As specific catalyst sites and projects are identified, site specific cost-benefit analyses will be completed to better understand the economic impacts of specific redevelopment scenarios.

Bergmann Associates presented a draft vision statement and guiding principles for the BOA. Committee members were asked to review this in greater detail and provide any comments or suggestions back to Bergmann Associates.

***3. Next Steps***

The next Steering Committee meeting will be held on May 13, 2010 at 3:30 PM in the LCDC conference room. Prior to this meeting Bergmann Associates will be distributing a draft of the Brownfield Opportunity Area Inventory and Preliminary Analysis for review by the Steering Committee.

The next joint public meeting will be held the week of May 18, 2010. Specific day, time, and location TBD with information forwarded to the Steering Committee and DOS as it becomes available. This meeting will be an interactive workshop format to assist in furthering the design vision for the BOA and LWRP.

# CITY OF NORTH TONAWANDA BOA AND LWRP

## STEERING COMMITTEE MEETING #6 • May 13, 2010

### MEETING AGENDA

1. **Introductions**

2. **Local Waterfront Revitalization Program**
   - Status Update

3. **Brownfield Opportunity Area Program**
   - Overview of Existing Conditions
   - Existing Conditions Q&A
   - Green Infrastructure Analysis
   - Strategic Sites Exercise

4. **Public Workshop**
   - May 20, 2010 at Carnegie Art Center

5. **Next Steps**

*Local Waterfront Revitalization Program*

- Complete Section 3 (Policies)
- Complete Section 4 (Proposed Land Uses and Projects)

*Brownfield Opportunity Area*

- Modify existing conditions text
- Draft land use and project recommendations narrative

### MEETING NOTES

# CITY OF NORTH TONAWANDA BOA AND LWRP

## STEERING COMMITTEE MEETING #7 • July 8, 2010

### MEETING ATTENDEES

- Kimberly Baptiste, Bergmann Associates
- Chuck Bell, Lumber City Development Corporation
- Amy Fisk, Niagara County Department of Economic Development
- Joe Fonzi, NT Environmental Commission
- Beverly Loxterman, Waterfront Commission
- Joyce Santiago, Tonawanda Chamber of Commerce
- Julie Sweet, NYS Department of State (conference call)
- Amy DeGaetano, NYS Department of State (conference call)

### MEETING SUMMARY

1. **Public Workshop Overview**
   Kimberly distributed copies of the Meeting Summary from the Public Workshop held on May 20th. Public comments from the meeting were discussed. It was determined by the Steering Committee that the Weatherbest Slip area should be changed from a 10-15 year strategic site to a 0-5 year strategic site, consistent with public comments. Bergmann Associates will modify the map as requested.

2. **Brownfield Opportunity Area Program**
   Kimberly discussed next steps in the BOA process will include a more detailed economic analysis of specific land uses on specific sites, as well as a series of phased site plans showing build-out of the BOA study area. Initial focus will be on 0-5 year strategic sites.

   The Steering Committee confirmed preferred land uses for 0-5 year strategic sites, as indicated below:

   - Gratwick Park – active and passive parkland, open space
   - Marina – marina, water dependent
   - Buffalo Bolt – light industrial
   - Tonawanda Island – mixed use, hotel, retail, high density housing, restaurants, and water dependent uses
   - Metzger properties – greenspace, comfort amenities
   - AutoZone – small scale commercial, retail, office
   - Weatherbest – public access, open space

**3. Local Waterfront Revitalization Program**

Section 4 (Proposed Projects) narrative was distributed for review and comment. The text was accompanied by an updated map and matrix showing how each project relates to the Policy section of the document. Hard copies of all materials were left with Chuck Bell for distribution to committee members. Next steps include the development of graphics and renderings for the Proposed Projects section of the document.

Section 3 (Policy) narratives were distributed for committee review and comment. A worksheet with a selection of key policy related statements was distributed for discussion purposes. The following summarizes key discussion points from the steering committee and Department of State:

- Policy 1. Ensure developers can spend more than two percent of their total project costs on public access projects, if so desired.
- Policy 2. Recommend completion of design standards for the historic district. *Note: This could be funded through the LWRP or BOA programs. This should be a recommendation in Section 5 of the LWRP.*
- Policy 3. Ensure language reflects boathouses along the Canal and Niagara River. Policy statements should add strength to local inspections and focus on maintenance and beautification of existing. The City would like to see a policy that restricts new boathouses on both the Canal and the River, noting boathouses are very different than marinas. Need to reference Canal Corporation document restricting new boathouses on Canal. *Note: In Section 5 of the LWRP be sure to address any necessary changes to existing zoning that would be required to eliminate new boathouse development.*
- Policy 4. No further discussion.
- Policy 5. Like concept of reduced paved vehicular parking where appropriate. Do not appear to be opportunities for land banking parking. *Note: Zoning recommendations for parking should be specified in Section 5.*
- Policy 6. No further discussion.
- Policy 7. No further discussion.
- Policy 8. Would like to see outdoor storage, junk yards, etc. prohibited in the waterfront area. Should be a reference to boats and boathouses releasing raw sewage into waterways – specifically reference standards and laws (DEC, EPA, etc.). *Note: Existing zoning should be reviewed for all allowable uses within LWRP boundary.*
- Policy 9. No changes discussed.
- Policy 10. Ensure we don't preclude water-enhanced uses, though water-dependent uses should still be first and foremost.
- Policy 11. Should leave door open for future passenger service opportunities on Niagara River.
- Policy 12. No further discussion.
- Policy 13. Ensure solar power is addressed.

Amy D. requested a copy of the current Local Consistency Review Law for the City. She will review to see if any updates are required.

**4. Next Meetings**

The next Steering Committee will be on September 9, 2010 at 3:30 PM.

The next public outreach will be a Design Workshop. Specific date to be determined during the week of September 13th (Tuesday, Wednesday, or Thursday).

**5. Next Steps**

Next steps for both projects were identified as below:

*Local Waterfront Revitalization Program*

- Incorporate comments on Sections 3 and 4 (by Sept)
- Complete Section 5-7 (by Sept)
- Prepare and deliver full draft plan (Oct/Nov)

*Brownfield Opportunity Area*

- Design, future land use, and build-outs (by Sept)
- Prepare and deliver full draft plan (Oct/Nov)

# CITY OF NORTH TONAWANDA BOA AND LWRP

## STEERING COMMITTEE MEETING #8 • October 5, 2010

### MEETING ATTENDEES

- Andy Raus, Bergmann Associates
- Chuck Bell, Lumber City Development Corporation
- Amy Fisk, Niagara County Department of Economic Development
- Joe Fonzi, NT Environmental Commission
- Beverly Loxterman, Waterfront Commission
- Joyce Santiago, Tonawanda Chamber of Commerce
- Julie Sweet, NYS Department of State (conference call)
- Amy DeGaetano, NYS Department of State (conference call)

### MEETING SUMMARY

**1. Local Waterfront Revitalization Program**

Andy distributed Sections 5, 6 and 7of the LWRP document for review by the Steering Committee. The focus of the meeting discussion was on priority public & private projects within the LWRP boundary. Renderings and/or simulations for improvements were shown via PowerPoint, and the following comments were made regarding these concepts:

*Twin Cities Memorial Highway Underpass Trailhead*

- Add benches along water
- Use a wayfinding sign consistent with wayfinding study recommendations.
- Show plan view describing connection to Payne Avenue walking path, Degraff Hospital, and Service Drive.

*Botanical Gardens Improvements*

- Trail may not be accepted by public with the appearance of going along the river.
- Expand the image to show trail going out the road.
- Add rowing crew facilities at the structure.

*Mayors Park Improvements*

- No kitchen at the existing bathrooms; two kitchens exist at the pavilions on site.
- Describe habitat restoration to be landside and waterside/littoral zone enhancements for fishery, etc.

*General Comments on LWRP document and projects*

- Better integrate wayfinding plan recommendations (physical and narrative) into the document.
- Discuss partnership or coordination opportunities with City of Tonawanda.

- LWRP will require "adoption ready" zoning language for LWRP areas

**2. Brownfield Opportunity Area Program**

Andy distributed Section 3.6 of the BOA document for review by the Steering Committee. The focus of the meeting discussion was on strategic sites and priority non-capital projects within the BOA boundary. Andy also provided an overview of the BOA Advancement Application recently forwarded to DOS for acceptance. The advancement application requested funding for 11 key implementation efforts related to the BOA. Renderings and/or simulations for improvements were shown via PowerPoint, and the following comments were made regarding these concepts:

- In presentation, Tremont Street is mentioned as a streetscape enhancement area. We believe it should be Main Street.
- Add wooden bollard system to the Wardell Boat Yard photo simulation to separate the trail from the driveway.
- There is an existing Rail Museum within the City. Consider enhancing the existing.
- Add recommendation to BOA for wind power law/regulations
- Consider additional opportunities to market the Buffalo Bolt site.
- Alternative Energy Discussion – eliminate WWTP as an energy source.
- Update BOA graphic showing the actual fishing pier alignment in Gratwick Park

**3. Next Steps**

*Local Waterfront Revitalization Program*

- Incorporate comments on Sections 5-7 (Nov)
- Prepare and deliver full draft plan (Nov/Dec)

*Brownfield Opportunity Area*

- Incorporate build out comments (Nov)
- Prepare and deliver full draft plan (Nov/Dec)

# CITY OF NORTH TONAWANDA LWRP and BOA

## STEERING COMMITTEE MEETING #9 • January 13, 2011

### Remaining Tasks and Project Schedule

| LWRP TASKS | COMPLETION |
|---|---|
| Task 18: Techniques for Local Implementation *(Finalize)* | February 2011 |
| Task 19: HMP Implementation Techniques *(Finalize)* | February 2011 |
| Task 21: Local Commitment and Consultation *(Finalize)* | February 2011 |
| Task 22: Compliance with SEQRA | February 2011 |
| Task 23: Draft LWRP Amendment | February 2011 |
| - Submittal of Preliminary Draft to DCR | February 25, 2011 |
| - Comments / Acceptance of Preliminary Draft | May 2011 |
| - 60-Day Review by State, federal, and local agencies | June / July 2011 |
| Task 24: Public Information Meeting | July 2011 |
| Task 25: Final LWRP Amendment / Schedule of Adoption | August 2011 |

| BOA TASKS | COMPLETION |
|---|---|
| Profiles of Sites for Marketing Purposes | February/March 2011 |
| Land Use Implementation Techniques | February 2011 |
| Implementation Projects | February 2011 |
| Compliance with SEQRA | |
| - Environmental Assessment Form | February 2011 |
| - Lead Agency | March 2011 |
| - Determine Significance | March 2011 |
| - Scoping Session (as needed) | April 2011 |
| - Final Scope of Issues (as needed) | May 2011 |
| Draft Nomination Study Submittal to DOS | February 25, 2011 |
| Draft Nomination Study Submittal (30-day review) for agency review | March 25, 2011 |
| Consultation on Comments | April 2011 |
| Final Nomination Study | May 2011 |

# CITY OF NORTH TONAWANDA LWRP and BOA

## PUBLIC WORKSHOP #1 • September 17, 2009

City of North Tonawanda Local Waterfront Revitalization Program 9/17/2009

# City of North Tonawanda

***Local Waterfront Revitalization Program***
***and***
***Brownfield Opportunity Area Program***



**PUBLIC VISIONING SESSION**
**SEPTEMBER 17, 2009**

*Funding for these projects is provided by the New York State Department of State Environmental Protection Fund and Brownfield Opportunity Area Program.*

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## Tonight's Agenda

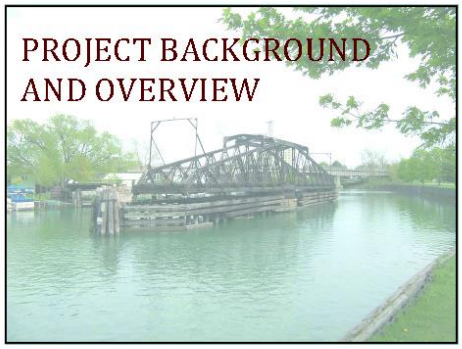
- Welcome and Introductions
- Meeting Purpose
- Project Background and Overview
  - Local Waterfront Revitalization Program (LWRP)
  - Brownfield Opportunity Area Program (BOA)
- Visioning Exercise
  - LWRP and BOA Breakout Groups (30 minutes each)
- Next Steps

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## Meeting Purpose

- To familiarize the community with current planning efforts and identify how they build upon recently completed efforts
- To inform the community about the LWRP and BOA programs
- To get feedback from the community regarding issues and opportunities associated with both study areas

## PROJECT BACKGROUND AND OVERVIEW



| Planning Efforts | Implementation/Actions |
|---|---|
| Downtown Redevelopment Plan, 2006 | Buffalo Bolt Redevelopment |
| Comprehensive Plan, 2007-2008 | |
| Gratwick Park Master Plan, 2008 | Phase I Access Pier |
| Wayfinding Study, 2009 | Gateway Harbor Signage |
| Local Waterfront Revitalization Program, 2009 - 2010 | Waterfront Projects (TBD) |
| Brownfield Opportunity Area Program, 2009 - 2010 | Revitalization Projects (TBD) |

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## Why these projects? Why now?

- Culmination of a number of planning initiatives undertaken in the City
- Part of the implementation of previous plan recommendations
- Provide greater level of detail related to recommendations in past plans
- Will result in expanded opportunities for implementation of projects

Public Visioning Workshop 1

City of North Tonawanda Local Waterfront Revitalization Program

9/17/2009




## Project Schedule - BOA

| | |
|---|---|
| May 2009 | Project Kick-Off |
| September 2009 | Public Visioning Meeting |
| October 2009 | Stakeholder Meetings |
| October 2009 | Vision ,Goals, & Objectives |
| December 2009 | Existing Conditions & Brownfield Analysis |
| December 2009 | Economic Market Analysis |
| February 2010 | Priority Sites and Projects |
| February 2010 | Land Use Recommendations |
| February 2010 | Design Workshop |
| April 2010 | Implementation Projects |
| July 2010 | Draft Nomination Study |
| July 2010 | Public Meeting |
| September 2010 | Final Nomination Study |
| October 2010 | Public Hearing |

## Project Schedule - LWRP

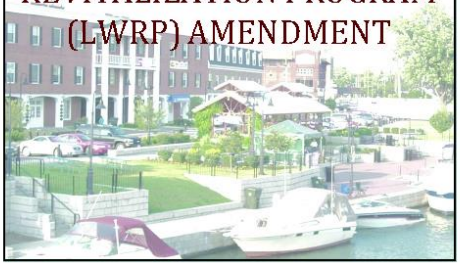
| | |
|---|---|
| May 2009 | Project Kick-Off |
| September 2009 | Public Visioning Meeting |
| October 2009 | Stakeholder Meetings |
| October 2009 | Identification of Issues & Objectives |
| December 2009 | Inventory and Analysis |
| December 2009 | Harbor Management Plan Resources |
| February 2010 | LWRP Policies |
| February 2010 | Preliminary Recommendations |
| February 2010 | Design Workshop |
| May 2010 | Implementation and Techniques |
| July 2010 | Draft LWRP |
| July 2010 | Public Meeting on Draft LWRP |
| September 2010 | Final LWRP |
| October 2010 | Public Hearing for Adoption |

Bergmann

## Community Involvement

- Steering Committee Meetings
  - ✓ Total of 8-10 meetings during planning process
- Public Meetings, Workshops, and Hearings
  - ✓ Total of 4 meetings during planning process
  - ✓ Tentatively February 2010, July 2010 and October 2010
- Additional Outreach
  - ✓ Stakeholder meetings
  - ✓ Website

## THE LOCAL WATERFRONT REVITALIZATION PROGRAM (LWRP) AMENDMENT



Bergmann

## What is a LWRP?

- A land and water use plan prepared by the local community, as well as a strategy for implementation.
- Establishes consensus on future of waterfront lands.
- Provides organization structure, local laws, and specific projects to implement the plan.
- It is a planning process today, but results in tangible implementation funding and projects.

Public Visioning Workshop 2

City of North Tonawanda Local Waterfront Revitalization Program 9/17/2009

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## NT LWRP Amendment Overview

- The City completed a LWRP that was adopted in 1988
- 1988 Plan identified a series of proposed projects for land and water uses
- Current effort will update previous plan to help the City become the recognized western gateway of the Erie Canal

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## Implemented Projects

- Bike path connection to Erie County Riverwalk in Tonawanda
- Improvements to Fisherman's Park (restrooms, sanitary sewer, parking, ADA)
- Creation of downtown lumber museum – The North Tonawanda History Museum
- Mayor's Park improvements
- Minor enhancements at Botanical Gardens

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## What are the benefits of a LWRP?

- Process identifies specific projects to:
  - ✓ Stimulate new economic activity
  - ✓ Redevelop historic and/or abandoned structures
  - ✓ Improve waterfront recreation
  - ✓ Restore and protects natural resources



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## What are the benefits of a LWRP?

- Increases North Tonawanda's ability to attract appropriate development.
- Increases opportunities to obtain public and private funding for projects.
- Basis for coordinating State and federal actions consistent with state-approved plan.
- Consistency requirement ensures all levels of government work together for betterment of the City.




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## What is a brownfield?

*"abandoned, idled, or underutilized properties where expansion or redevelopment is complicated by real or perceived environmental contamination"*

Public Visioning Workshop 3

City of North Tonawanda Local Waterfront Revitalization Program 9/17/2009

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## What is a brownfield?

- Former industrial properties
- Gas stations
- Waste disposal areas
- Auto dealerships and repair shops
- Locations of chemical spills
- Laundromats





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## What can a brownfield become?

- **Almost anything!**
- Industrial / Business Park
- Parks and Open Space
- Residential
- Commercial
- Municipal



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## What is the BOA Program?

- Administered and managed through NYS Department of State
- Provides financial and technical assistance to complete area-wide planning approaches to brownfield redevelopment and revitalization
- *Focuses on community revitalization and economic development as it relates to associated brownfields and other vacant or underutilized sites*

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## The 3 Step Process

Phase 1: Pre-Nomination Study

Intended for communities that need to complete additional preliminary research about brownfield sites in their community.

*Phase 2: Nomination Study*

*In-depth description and analysis of existing conditions, above and beyond brownfield sites. Typically includes a market and economic analysis and identifies opportunities and reuse potentials for BOA properties.*

Phase 3: Implementation Strategy

Detailed strategies for achieving the vision of the BOA. Potential to complete Site Assessments, as determined necessary.

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## What is the outcome of the BOA process?

- A community-based plan for the revitalization of Tonawanda Island, the River Road corridor, downtown, and surrounding impacted areas
- The identification of specific, desirable future land uses in the study area
- A vision for the study area to help guide future economic development efforts
- Relationships and collaboration between local, state, and federal agencies, and the private sect

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## What are benefits of the BOA Program?

- New business growth resulting in expanded job opportunities and increased tax base
- Establishes investment opportunities
- Sustainable development – utilizes existing infrastructure
- Expanded recreation and open space assets – creating green linkages
- Improved quality-of-life for residents
- Tax credit benefits for eligible brownfield properties

Public Visioning Workshop 4

City of North Tonawanda Local Waterfront Revitalization Program

9/17/2009

# VISIONING EXERCISE



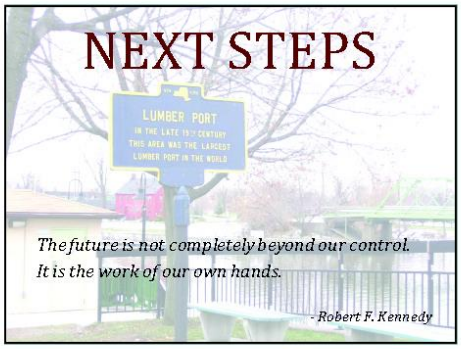
## Break-Out Groups

- **Purpose:** To have focused discussions on each of the individual projects. Identify issues and opportunities.
- **Groups:** All attendees with a "1" on their agenda should start in BOA group. All attendees with a "2" should start in LWRP group.
- **Format:** Each discussion will be 30 minutes and then groups will switch.

# BREAK

Please enjoy a 10 Minute Break before our Break-Out Group sessions

# NEXT STEPS




*The future is not completely beyond our control. It is the work of our own hands.*

*- Robert F. Kennedy*

## Next Steps for the Project Team - BOA

- Draft Vision, Goals, Objectives
- Brownfield Site Analysis
- Economic and Market Trends Analysis
- Identification of Priority Sites
- Stakeholder Meetings (November)

## Next Steps for the Project Team - LWRP

- Inventory and Analysis of Study Area
- Harbor Management Plan Resources, Issues, and Objectives
- Stakeholder Meetings (November)

Public Visioning Workshop 5

City of North Tonawanda Local Waterfront Revitalization Program 9/17/2009

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## Next Steps for the Community

- Sign-up tonight to be involved in focus group meetings (November 2009)!
- Continue to check project website for project-related information, draft documents, and information on upcoming meetings/dates
- Participate in design workshop to determine preferred development scenarios (February 2010)

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## What can you do?

- Stay involved.
- Spread the word.
- Ask questions.
- Share your knowledge.

*Never doubt that a small group of committed citizens can change the world; indeed it is the only thing that ever has.*

*-Margaret Mead*

Public Visioning Workshop 6

# CITY OF NORTH TONAWANDA LWRP and BOA

## PUBLIC WORKSHOP #2 • May 20, 2010

City of North Tonawanda Local Waterfront Revitalization Program 5/20/2010

# City of North Tonawanda

***Local Waterfront Revitalization Program***
***and***
***Brownfield Opportunity Area Program***



**PUBLIC WORKSHOP**
**MAY 20, 2010**

*Funding for these projects is provided by the New York State Department of State Environmental Protection Fund and Brownfield Opportunity Area Program.*

## Tonight's Agenda

- Project Overview
- Summary of Existing Conditions
- Break-Out Group Summary
- Break-Out Group #1 Session
- BREAK / REFRESHMENTS
- Break-Out Group #2 Session
- Next Steps

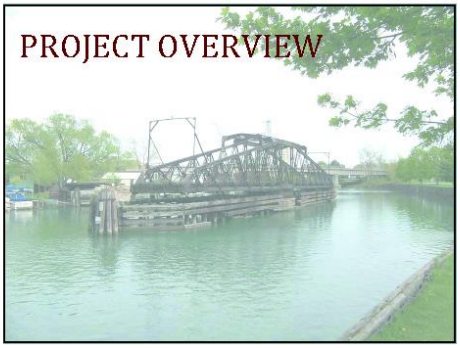
## Planning Efforts / Implementation/Actions

| Planning Efforts | Implementation/Actions |
|---|---|
| Downtown Redevelopment Plan, 2006 | Buffalo Bolt Redevelopment |
| Comprehensive Plan, 2007-2008 | |
| Gratwick Park Master Plan, 2008 | Phase I Access Pier |
| Wayfinding Study, 2009 | Gateway Harbor Signage |
| Local Waterfront Revitalization Program, 2009 - 2010 | Waterfront Projects (TBD) |
| Brownfield Opportunity Area Program, 2009 - 2010 | Revitalization Projects (TBD) |

## Why these projects? Why now?

- Culmination of a number of planning initiatives
- Implementation of previous plan recommendations
- Provide greater level of detail related to recommendations in past plans
- Will result in expanded opportunities for implementation of projects

## PROJECT OVERVIEW



## Community Involvement

- Steering Committee Meetings
  - ✓ 8-10 meetings
- Public Meetings, Workshops, & Hearings
  - ✓ 4 meetings
  - ✓ September 2009, May 2010, August 2010 and November 2010
- Additional Outreach
  - ✓ Stakeholder meetings



City of North Tonawanda Local Waterfront Revitalization Program 5/20/2010

## What is a LWRP?



- **A land and water use plan**
- **A strategy for implementation**
- Establishes consensus on future use of waterfront lands
- Provides updates to local laws and specific projects to implement the plan

## NT LWRP Amendment Overview

- Existing LWRP adopted in 1988
- Current effort will update previous plan to help the City become the recognized western gateway of the Erie Canal



## Implemented Projects

- **Bike path** connection to Erie County Riverwalk in Tonawanda
- Improvements to **Fisherman's Park** (restrooms, sanitary sewer, parking, ADA)
- Creation of **downtown lumber museum** – The North Tonawanda History Museum
- **Mayor's Park** improvements
- Minor enhancements at **Botanical Gardens**

## What are the benefits of a LWRP?

- Process identifies specific projects to:
  - ✓ Stimulate new economic activity
  - ✓ Redevelop historic and/or abandoned structures
  - ✓ Improve waterfront recreation
  - ✓ Restore and protects natural resources



## What are the benefits of a LWRP?

- Increases North Tonawanda's ability to attract appropriate development.
- Increases opportunities to obtain public and private funding for projects.
- Basis for coordinating State and federal actions consistent with state-approved plan.
- Consistency requirement ensures all levels of government work together for betterment of the City.

## What is the BOA Program?

- Administered and managed through NYS Department of State
- Provides financial and technical assistance to complete area-wide planning approaches to brownfield redevelopment and revitalization
- *Focuses on community revitalization and economic development as it relates to associated brownfields and other vacant or underutilized sites*

Public Workshop #2 2

City of North Tonawanda Local Waterfront Revitalization Program 5/20/2010

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## The 3 Step Process

Phase 1: Pre-Nomination Study

Intended for communities that need to complete additional preliminary research about brownfield sites in their community.

*Phase 2: Nomination Study*

*In-depth description and analysis of existing conditions, above and beyond brownfield sites. Typically includes a market and economic analysis and identifies opportunities and reuse potentials for BOA properties.*

Phase 3: Implementation Strategy

Detailed strategies for achieving the vision of the BOA. Potential to complete Site Assessments, as determined necessary.

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## What are the outcomes of the BOA process?

- A community-based plan for revitalization
- Identification of specific, desirable future land uses
- A vision to help guide future development efforts
- Relationship-building and collaboration

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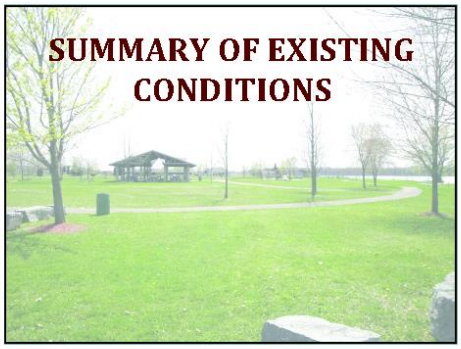
## What are benefits of the BOA Program?

- New business growth
- Expanded job opportunities
- Increased tax base
- Investment opportunities
- Sustainable development
- Expanded open space assets
- Improved quality-of-life
- Tax credit benefits for eligible brownfield properties





## SUMMARY OF EXISTING CONDITIONS



## BOA Summary

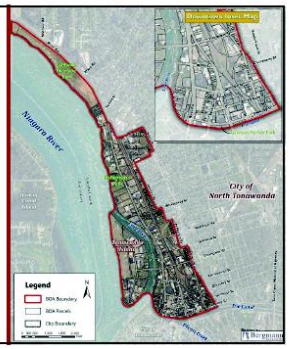
Bounded by:
N – Northern City limits
S – Erie Canal
E – Varies
W – Niagara River

426 acres.

448 individual parcels.

15,000 feet of Niagara River frontage.

3,500 feet of Erie Canal frontage.




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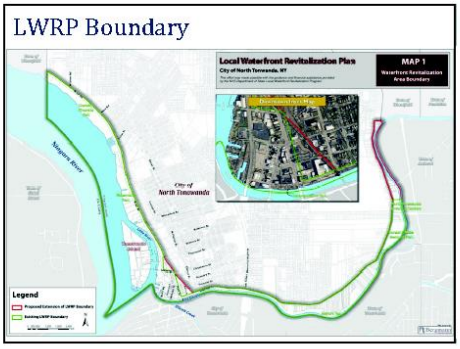
## Inventory & Analysis

- BOA Boundary
- Regional Setting
- Land Use
- Zoning
- Brownfield, Vacant, and Underutilized Sites
- Strategic Sites
- Ownership
- Parks and Open Space
- Building Inventory
- Historic Sites
- Transportation Systems
- Infrastructure
- Natural Resources
- Economic and Market Trends Analysis

Public Workshop #2 3

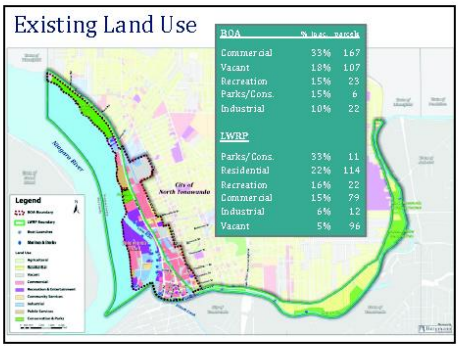
City of North Tonawanda Local Waterfront Revitalization Program

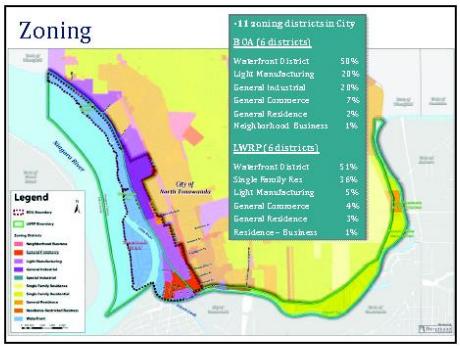
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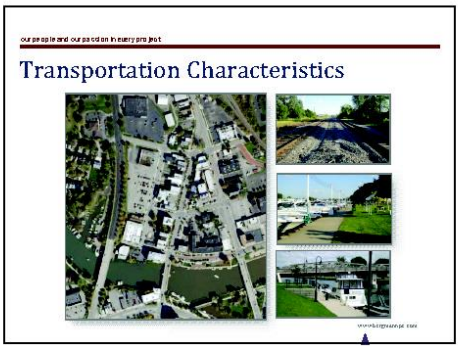








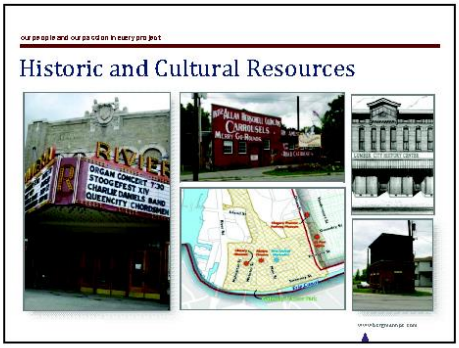



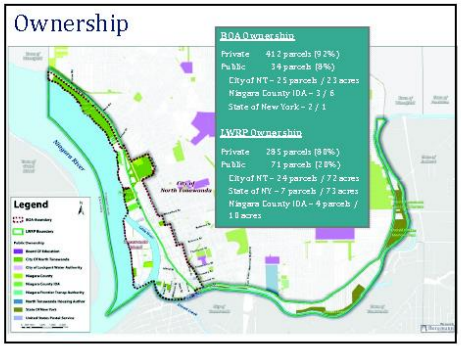






City of North Tonawanda Local Waterfront Revitalization Program

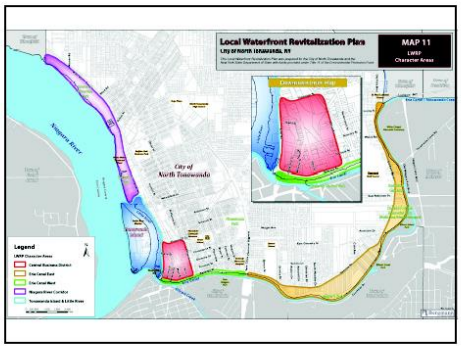
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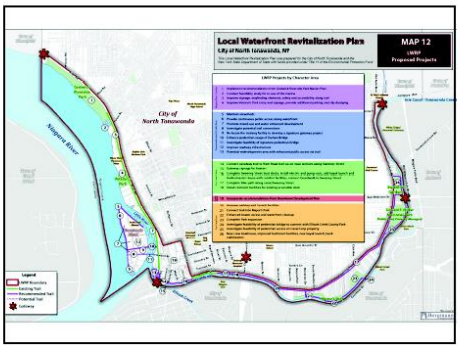


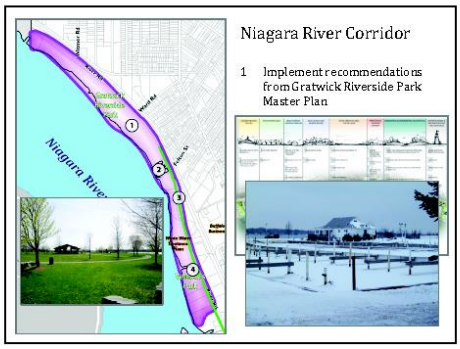







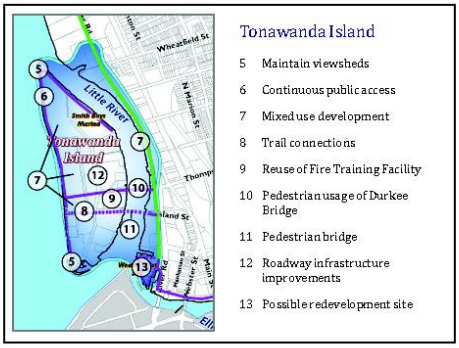


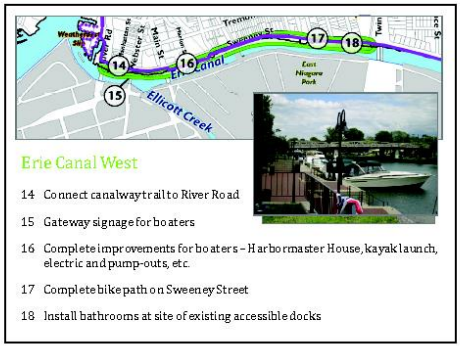



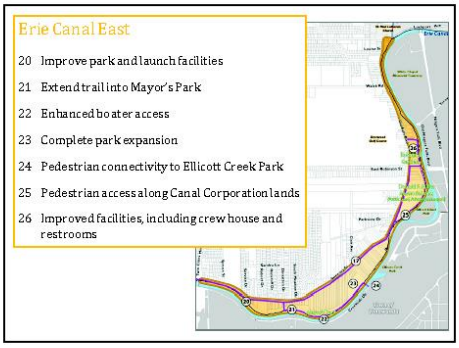




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City of North Tonawanda Local Waterfront Revitalization Program 5/20/2010

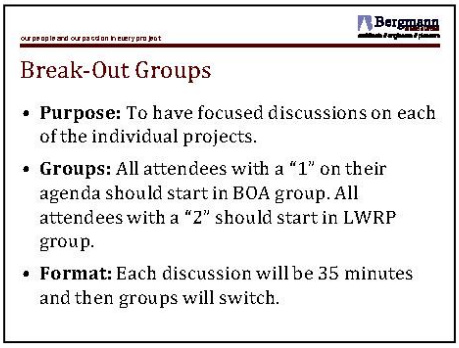









Public Workshop #2 6

# CITY OF NORTH TONAWANDA LWRP and BOA

## PUBLIC DESIGN WORKSHOP • October 27, 2010

City of North Tonawanda Local Waterfront Revitalization Boundary 10/27/2010

**City of North Tonawanda**
**BROWNFIELD OPPORTUNITY AREA *and***
**LOCAL WATERFRONT REVITALIZATION PROGRAM**



**PUBLIC DESIGN WORKSHOP**
OCTOBER 27, 2010

## TONIGHT'S AGENDA

| | |
|---|---|
| • Welcome & Project Overview | 6:00 – 6:10 |
| • Meeting Goals and Objectives | 6:10 – 6:15 |
| • Design Primer | 6:15 – 6:35 |
| • Pencil to Paper Design Session #1 | 6:35 – 7:20 |
| • BREAK | 7:25 – 7:35 |
| • Pencil to Paper Design Session #2 | 7:35 – 8:20 |
| • Design Session Review & Next Steps | 8:20 – 8:30 |

## WHY THESE PROJECTS? WHY NOW?

- Culmination of a number of planning initiatives
- Implementation of previous plan recommendations
- Provide greater level of detail related to recommendations in past plans
- Will result in expanded opportunities for implementation of projects

| Planning Efforts | Implementation |
|---|---|
| Downtown Redevelopment Plan, 2006 | Buffalo Bolt Redevelopment |
| Comprehensive Plan, 2007-2008 | |
| Gratwick Park Master Plan, 2008 | Phase I Access Pier |
| Wayfinding Study, 2009 | Gateway Harbor Signage |
| Local Waterfront Revitalization Program, 2009 - 2010 | Waterfront Projects (TBD) |
| Brownfield Opportunity Area Program, 2009 - 2010 | Revitalization Projects (TBD) |

## WHAT IS AN LWRP?

- **NYS DOS funded program**
- **A land and water use plan**
- **A strategy for implementation**
- Establishes consensus on future use of waterfront lands
- Provides updates to local laws and specific projects to implement the plan
- Provides roadmap for future coastal projects





## COMPLETED LWRP PROJECTS

- **Bike path** connection to Erie County Riverwalk in Tonawanda
- Improvements to **Veteran's Park**
- Creation of the North Tonawanda History Museum
- **Mayor's Park** improvements
- Minor enhancements at **Botanical Gardens**





Public Design Workshop 1

City of North Tonawanda Local Waterfront Revitalization Boundary

10/27/2010

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## BENEFITS OF AN LWRP

- Increases North Tonawanda's ability to attract appropriate development.
- Increases opportunities to obtain public and private funding for projects.
- Basis for coordinating State and federal actions consistent with state-approved plan.
- Consistency requirement ensures all levels of government work together for betterment of the City.





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## PROPOSED LWRP PROJECTS





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## WHAT IS THE BOA PROGRAM?

- Administered and managed through NYS DOS
- Financial and technical assistance for area-wide revitalization strategies
- Focuses on community revitalization and economic development associated with brownfields and other vacant or underutilized sites



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## THE 3-STEP BOA PROCESS

Phase 1: Pre-Nomination Study

Intended for communities that need to complete additional preliminary research about brownfield sites in their community.

*Phase 2: Nomination Study*

*In-depth description and analysis of existing conditions, above and beyond brownfield sites. Typically includes a market and economic analysis and identifies opportunities and reuse potentials for BOA properties.*

Phase 3: Implementation Strategy (application submitted Sept 2010)

Detailed strategies for achieving the vision of the BOA. Potential to complete Site Assessments, as determined necessary.

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## BENEFITS OF THE BOA PROGRAM

- New business growth
- Expanded job opportunities
- Increased tax base
- Investment opportunities
- Sustainable development
- Expanded open space assets
- Improved quality-of-life
- Tax credit benefits for eligible brownfield properties



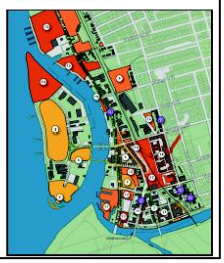


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## PROPOSED BOA STRATEGIC SITES



Public Design Workshop

2

City of North Tonawanda Local Waterfront Revitalization Boundary

10/27/2010

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## COMMUNITY INVOLVEMENT

- Steering Committee Meetings
  - ✓ 8-10 meetings (8 through Oct 2010)
- Public Meetings, Workshops, & Hearings
  - ✓ 4 meetings
  - ✓ September 2009, May 2010, October 2010 and January 2011
- Additional Outreach
  - ✓ Stakeholder meetings



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## MEETING GOALS AND OBJECTIVES

- Get community feedback on design and land use issues impacting the future of the downtown and waterfront
- Define how the community would like to see the following improved upon:
  - ✓ Downtown
  - ✓ Niagara Riverfront
  - ✓ Erie Canal
  - ✓ Parks
  - ✓ Waterfront Access
  - ✓ Tonawanda Island
  - ✓ Gateways
  - ✓ Commercial Corridors
  - ✓ Industrial Development
  - ✓ River Road

## Design Education

Virtual Tour of Three Communities

Waterfront Considerations



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## PORTSMOUTH, NEW HAMPSHIRE



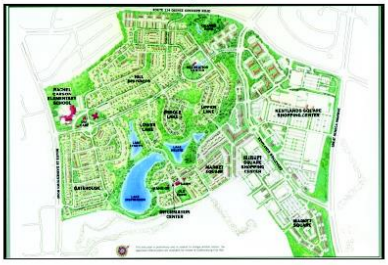
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## WEST CHESTER, PENNSYLVANIA



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## KENTLANDS, MARYLAND



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City of North Tonawanda Local Waterfront Revitalization Boundary

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## What Makes a "Great Place"?

1. Attractive and Integrated Public Spaces
2. Mixing of Uses – Backbone of Vibrancy
3. Residents and Visitors in Walking Distance

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## What are Public Spaces?



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## SIDEWALKS: The Nexus of Public & Private Space



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## INTERSECTIONS: Defining Urban Form



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## PARKS: Places to Rest and Play



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## CROSSWALKS: Making it Safe to Explore



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City of North Tonawanda Local Waterfront Revitalization Boundary

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OUTDOOR SEATING: Keeping People Downtown



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TRANSIT STOPS: Improving Access and Activity



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THE SQUARE: A Focal Point of Urban Form



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GREENSPACE: Privacy and Character



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ORGANIZATION: Give Retail the First Floor



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UPPER STORIES: Provide Visibility to Upper Levels

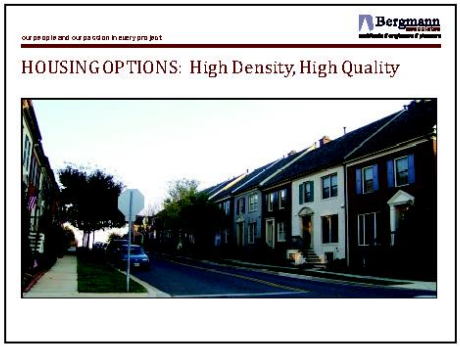


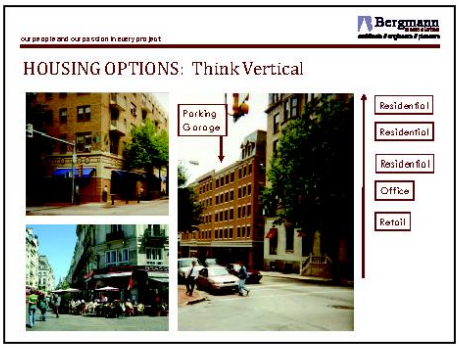

Public Design Workshop 5

City of North Tonawanda Local Waterfront Revitalization Boundary

10/27/2010



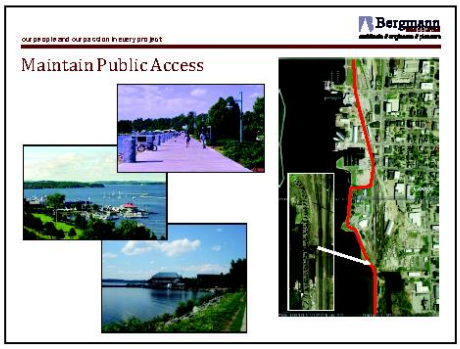










Public Design Workshop 6

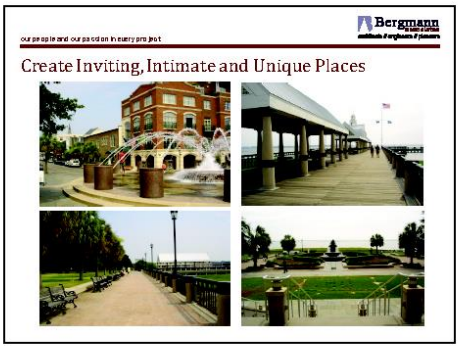
City of North Tonawanda Local Waterfront Revitalization Boundary

10/27/2010





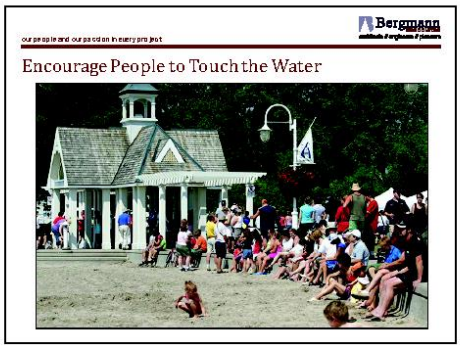











Public Design Workshop 7

City of North Tonawanda Local Waterfront Revitalization Boundary

10/27/2010

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Create Inviting Connections from Downtown to Water



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Keep the Waterfront Visible



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Program Spaces for Special Events



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## PENCIL TO PAPER DESIGN SESSION

- THREE TABLES
  - Brownfield Opportunity Area
  - Local Waterfront Revitalization Plan
  - Open Space, Parks & Green Infrastructure
- Spend 45 minutes, and then switch topic areas
- Regroup at 8:20

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# BREAK

PLEASE RETURN TO YOUR TABLE IN 10 MINUTES.

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## NEXT STEPS

- Refine ideas and input from tonight's meeting
- Refine Actions and Recommendations
- Prepare Draft Nomination Study & Draft LWRP
- Final Public Meeting tentatively set for Feb 2011
- Adoption in February/March 2011

Public Design Workshop 8

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# APPENDIX B: MARKET & ECONOMIC TRENDS ANALYSIS

Appendix B provides a complete copy of the Market and Trends Analysis that was summarized in Section 3.4, and utilized throughout Sections 3.6 and 4 to make market-based recommendations for the City of North Tonawanda BOA revitalization strategy.

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# Market and Economic Trends Analysis for the North Tonawanda Brownfield Opportunity Area

**City of North Tonawanda, Niagara County, New York**
**2009**

## Executive Summary

Camoin Associates was engaged to do an economic and market analysis for the proposed North Tonawanda Brownfield Opportunity Area (BOA). The following existing conditions analysis includes a general economic outlook report for the region as well as demographics, real estate, retail, office and industrial use trends. For most of the study (all reports except the General Economic Outlook), the "Trade Area" was defined as three zip codes surrounding the North Tonawanda BOA (Zip Codes: 14120, 14228, 14150), which provided a wide-range view of what is occurring in the general area. With input from the client, Camoin Associates chose to use the zip codes rather than Niagara County due to the impact of the City of Niagara Falls on the county-wide data, which might skew the information and paint an unrealistic picture of the North Tonawanda BOA. Specific trends were also identified on a more local basis.

This report includes an existing conditions analysis of the Trade Area as well as an analysis of possible redevelopment opportunities. Camoin Associates utilized data analysis, additional research and interviews with locals to determine what possibilities exist for the BOA and how they will be most successful. The intent of this market analysis report is to provide a market-based perspective on the BOA and identify opportunities that can be studied further as part of a redevelopment plan.

### General Economic Outlook

The general economic outlook for the region was analyzed using data from Niagara County and western New York to determine what factors may impact the ability of the North Tonawanda BOA to capitalize on various redevelopment scenarios. The general economic outlook compared the Trade Area to upstate New York, the State and the Nation in terms of job growth, regional industry demands and economic base. This information helped provide background information and a context for the market analysis. It was important to acknowledge that the Trade Area does not act in a bubble and is impacted by the region in which it sits.

The economic base of Niagara County is heavily weighted towards government, health care, retail trade and manufacturing, with approximately 58% of the region's jobs attributed to these four sectors. There will be no growth in the County's employment opportunities over the next five years, with total jobs declining by 200, a decrease of 0.25%. As a comparison, the Upstate region has projected growth of 4%, the State projects 6% growth and the United States projects 9% growth.

The unemployment rate in Niagara County is particularly high in 2009, and ranks 7$^{th}$ out of 62 counties for the high level of unemployment. The highest unemployment rate is in the *mining industry* with over 50% unemployment as

a percentage of the total jobs in this category. The industry with the highest number of unemployed residents is the *manufacturing industry*, with over 2,000 residents unemployed.

The industry with the lowest unemployment rate is the *utilities industry* with only 1.37% unemployment, or 11 unemployed persons. Other industries with low unemployment rates include *health care and social assistance* (4.24%), *educational services* (3.53%) and *agriculture* (2.51%).

The *health care industries and associated fields* not only have low unemployment rates but are also expected to grow at one of the quickest rates in the next few years, adding almost 747 jobs in the next five years (6.5% increase). The *Administrative and waste services* sector is also expected to gain over 500 jobs in the next five years. The *manufacturing industry* is expected to continue to decline over the next five years, losing over 1,500 jobs or a decrease of 17%.

Demographics

The existing conditions demographic report identified trends of the North Tonawanda BOA Trade Area and how the trends relate to other parts of the State and Nation. This demographic analysis helps identify unique characteristics of the area which may be important as part of the redevelopment scenario. The demographic indicators analyzed include population, household income, age distribution, racial composition, typical occupations and other features which impact the retail, employment and residential needs. The findings of this existing conditions report will help to identify a direction for the redevelopment plan which will be compatible with the current population and/or meet the needs of potential future residents.

The population of the Trade Area is decreasing slowly, approximately 0.33% annually through 2014. In comparison, the State's population is expected to decline by approximately 0.10% annually and the national population is projected to grow by .91% annually between 2009 and 2014. The median household income is expected to increase at a rate of just over 1.5% annually through 2014 or a total of 8.2% by 2014, slower than both the State and the Nation.

The age distribution in the Trade Area is relatively similar to the rest of the State. The location quotient graph for age shows that there are proportionally more people aged 70-80 years old living in the Trade Area as compared to the State average and less people aged 35-39 years old.

Residential Analysis

The residential analysis looked at existing housing stock, current residential unit status, prices of renting and other factors which play a role in the residential market. This provided information on residential development potential in the area market and on the types of residential development needed or over-represented in the area.

There are over 45,000 housing units in the Trade Area, 64% owner-occupied, about 30% renter-occupied, the rest are vacant (6.3%). Homeownership is expected to increase slightly in the next five years. In the City of North

Tonawanda, 6% of residential units are vacant, a lower percentage than exists in the City of Buffalo or the City of Niagara Falls, 21.8% and 19.9% respectively.

Most of the residential units are single family detached structures (67.3%), with the next most common being a 2 family house (10.4%). Compared to upstate New York, the Trade Area has a higher proportion of single family detached houses and a slightly lower proportion of two family houses.

The value of owner-occupied homes increased dramatically between 2000 and 2009, jumping from $86,000 to almost $150,000 in 2009. However, the projected increase between 2009 and 2014 is a more steady increase of $30,000. This is a similar trend for upstate New York, the State and the Nation. The average monthly mortgage for residents who own their home is approximately $1,051 a month. The average monthly rent in the Trade Area is $480, which is slightly higher than the Upstate average of $433 a month.

Retail Market Analysis

The market analysis looked at consumer spending habits within the region, identified retail demand and household spending characteristics and highlighted business opportunities or niche markets which are not being met by the current market. The market analysis found existing underserved sectors that could be targeted for location at the site.

The market analysis shows that there is consumer spending "leaking" out of the Trade Area to other regions. This is money that is being spent by local residents on goods outside of the trade area and therefore represents "lost" business revenue and County/City sales tax and property tax revenue. The sectors with the largest retail gap include motor vehicle and parts dealers, clothing and clothing accessories stores, general merchandise stores and furniture and home furnishings stores.

By looking at how much revenue an average-sized store earns in the State by retail sector, we identified which sectors would be able to support one or more additional stores in the Trade Area based solely on the retail "leakage". The sectors identified include many of the ones experiencing leakage, including sporting goods stores, health and personal care stores, and food services and drinking places.

Consumer spending patterns in the trade area also say a lot about the current market and what potential exists for additional services and retail amenities. The consumer spending index identified that households in the Trade Area spend proportionately more of their income on health care and utilities as compared to the national average and relatively less on other goods such as apparel. As unavoidable expenses such as health care and utilities continue to go up, Trade Area residents may have less money to spend on discretionary items such as travel and entertainment. The local residents are spending close to the national average on some luxury items, such as vacation homes and food away from home.

Office and Industrial Real Estate Analysis

An analysis of projected growth of industrial and office utilizing industries was completed to determine how that growth/decline relates to existing available space to identify possibly unmet demand.

The growth of industrial site-utilizing sectors is slow and in some cases negative. The Trade Area manufacturing industry is expected to decline by approximately 14% or 1,060 jobs in the next five years. There is expected to be a 3% increase in transportation and warehousing in the Trade Area in the coming years, creating a possible opportunity for future development. There is currently a total of 648,595 square feet of available inventory in the north Buffalo submarket. The absorption in this region is relatively strong and has been strong for three years.

There is projected to be slow growth (4%) in the office space-utilizing industries. There is 750,000 square feet of available office space in the north Buffalo submarket, ranging from Class A office space to flex space. The office space vacancy rate is approximately 10%, showing a slight increase over last year. The prices quoted for office space in this region ranges between $10 to $23 per square foot, depending on the type of space.

Tourism Analysis

The City of North Tonawanda was also interested in understanding the existing tourism market as part of its BOA effort. As with the other market analyses, Camoin Associates utilized data analysis, interviews, and review of existing research to determine if the City has an opportunity to capitalize on the existing tourism industry occurring within the region. There has been a good amount of research done on the tourism industry in Niagara County and the ever increasing number of visitors coming to experience Niagara Falls each year. Reports estimate that approximately 6 million people visit Niagara Falls each year and this number is reported to be growing.

Unlike surrounding communities, the City of North Tonawanda does not currently have a hotel available for overnight stays and has been unable to fully realize the economic impact of tourism on their local economy. Without a hotel, they have been relying primarily, and successfully, on attracting day visitors to the canal with events, concerts and festivals. The City reports that there are between 4,000 and 8,000 visitors to the concerts, and many boats docked at City docks throughout the summer months. It has been more difficult for the City to identify ways to attract visitors during the winter months, as the waterfront is the primary attraction.

There has been some growth in tourism related industries, such as *Accommodations and Food Services*, with a 6% job increase since 2005. The largest growth in tourism related industries has come from an increase of 213 jobs in the *limited-services eating places* industry.

Findings and Recommendations

The following recommendations were developed from interviews, data analysis and additional research and represent some possibilities for the redevelopment of the BOA.

Retail:

- Continue to redevelop and revitalize Gateway Harbor by providing services and amenities for visitors and residents alike. Smaller stores that will fit the "downtown" character of Webster Street will be most successful.
- Limited demand or space for a large big-box store within the BOA.

Residential:

- Large percentage of existing housing stock is single-family homes, and with new development occurring in neighboring towns and lack of space, there was found to be limited demand for additional single family homes within the BOA.
- Work to redevelop the upper floors along Webster Street into residential apartments.
- There is a high percentage of elderly residents within the BOA, consider senior housing with waterfront views, amenities and walkability.

Office and Commercial:

- New office space development is occurring nearby, and with the slow growth in office-utilizing jobs, there is unlikely to be demand for any new large Class A office space development within the BOA.
- Work with the entrepreneurs from the Remington Rand project to offer office space above retail stores in the Gateway Harbor district. Capitalize on the advances in technology that allow employers to locate anywhere and be in touch with their clients.

Industrial:

- Very slow growth in industrial-space utilizing industries.
- Development of the Buffalo Bolt site should include flexible industrial space and offer incentives where possible to attract businesses to the area.
- Limited demand for additional industrial development, other than the Buffalo Bolt site, at this time.

Tourism:

- The City of North Tonawanda is in a prime location to capitalize on tourism activities coming from Niagara Falls.
- Lack of hotel space is a major deterrent to tourism and is making it difficult for the City to realize the full economic potential of tourism.
- Building a hotel with unique amenities and offerings will be key to bringing in the economic activity associated with overnight visitors.
- Work to develop winter month activities to continue to attract visitors throughout the year.

# GENERAL ECONOMIC OUTLOOK

## Introduction

Camoin Associates was retained to compile a general economic outlook as context to understand the local markets at play in the City of North Tonawanda and more specifically within the BOA. In order to identify the larger factors impacting the local area and to properly analyze the general economic outlook Niagara County is used as the trade area to capture the major issues and opportunities for the area.

For public and private sector employment data, Camoin Associates relied on Economic Modeling Systems, Inc. (EMSI) (www.economicmodeling.com). EMSI combines covered employment data from the Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with data from the Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA) and augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data combined with past trends in each industry, industry growth rates in national projections (Bureau of Labor Statistics), and projections and data from the New York State Department of Labor.

The data includes all employment covered by unemployment insurance – only the self-employed, student workers, unpaid family workers, and some agricultural workers are excluded. Unlike the decennial Census, QCEW measures jobs by place of *work*, not place of *residence*, so it is a strong measure of economic activity taking place in a particular region.

Some of the data analyzed in this report are broken down into industry sectors, organized using the North American Industrial Classification System (NAICS). The analysis was performed primarily at the 2-digit NAICS code level, which is the highest aggregated level available. A listing of the 2-digit NAICS codes used for this analysis can be found below.

| AICS Code | Description |
|---|---|
| 11 | Agriculture, forestry, fishing and hunting |
| 21 | Mining |
| 22 | Utilities |
| 23 | Construction |
| 31-33 | Manufacturing |
| 42 | Wholesale trade |
| 44-45 | Retail trade |
| 48-49 | Transportation and warehousing |
| 51 | Information |
| 52 | Finance and insurance |
| 53 | Real estate and rental and leasing |
| 54 | Professional and technical services |
| 55 | Management of companies and enterprises |
| 56 | Administrative and waste services |
| 61 | Educational services |
| 62 | Health care and social assistance |
| 71 | Arts, entertainment, and recreation |
| 72 | Accommodation and food services |
| 90 | Government |

*Source: EMSI Complete Employment - Spring 2008 Release v. 2*

## Unemployment

The table below shows total current jobs and unemployment numbers in Niagara County for the month of April 2009, using the two-digit federal NAICS system of classifying occupations. The unemployment rate is shown as a percentage of total jobs in that category for Niagara County, New York State, and the U.S as a whole.

Unemployment is especially high in the following industries:

- Mining
- Manufacturing
- Construction
- Administrative and waste services

Unemployment is relatively low in the following industries:

- Health care and social assistance
- Educational services
- Agriculture, forestry, fishing and hunting
- Utilities

**Niagara County Unemployment**

| | | | | % of Total Jobs | | |
|---|---|---|---|---|---|---|
| **NAICS Code** | **Description** | **2009 Jobs** | **April Unemp** | **Niagara County** | **State** | **National** |
| 21 | Mining | 34 | 18 | 52.32% | 15.82% | 10.83% |
| 31-33 | Manufacturing | 9,474 | 2,212 | 23.35% | 13.63% | 16.74% |
| 23 | Construction | 4,137 | 954 | 23.06% | 14.90% | 16.49% |
| 56 | Administrative and waste services | 4,251 | 873 | 20.55% | 10.33% | 11.07% |
| 72 | Accommodation and food services | 5,811 | 1,146 | 19.72% | 9.83% | 7.82% |
| 51 | Information | 687 | 109 | 15.87% | 6.28% | 7.56% |
| 48-49 | Transportation and warehousing | 2,999 | 456 | 15.20% | 10.48% | 7.77% |
| 44-45 | Retail trade | 11,078 | 1,557 | 14.06% | 8.10% | 8.61% |
| 42 | Wholesale trade | 1,843 | 245 | 13.30% | 7.17% | 8.07% |
| 54 | Professional and technical services | 3,195 | 398 | 12.47% | 5.28% | 5.15% |
| 52 | Finance and insurance | 2,048 | 247 | 12.06% | 4.94% | 4.20% |
| 71 | Arts, entertainment, and recreation | 1,683 | 180 | 10.69% | 5.47% | 5.04% |
| 81 | Other services, except public administration | 4,389 | 315 | 7.17% | 4.11% | 4.46% |
| 90 | Government | 14,968 | 1,012 | 6.76% | 3.31% | 2.01% |
| 53 | Real estate and rental and leasing | 1,863 | 96 | 5.13% | 2.76% | 2.37% |
| 55 | Management of companies and enterprises | 994 | 50 | 5.05% | 2.10% | 2.86% |
| 62 | Health care and social assistance | 11,517 | 488 | 4.24% | 2.65% | 3.14% |
| 61 | Educational services | 2,045 | 72 | 3.53% | 3.16% | 3.37% |
| 11 | Agriculture, forestry, fishing and hunting | 1,372 | 34 | 2.51% | 1.83% | 4.50% |
| 22 | Utilities | 800 | 11 | 1.37% | 0.93% | 3.05% |
| | **Total** | **85,186** | **11,395** | **13.4%** | **6.65%** | **6.76%** |

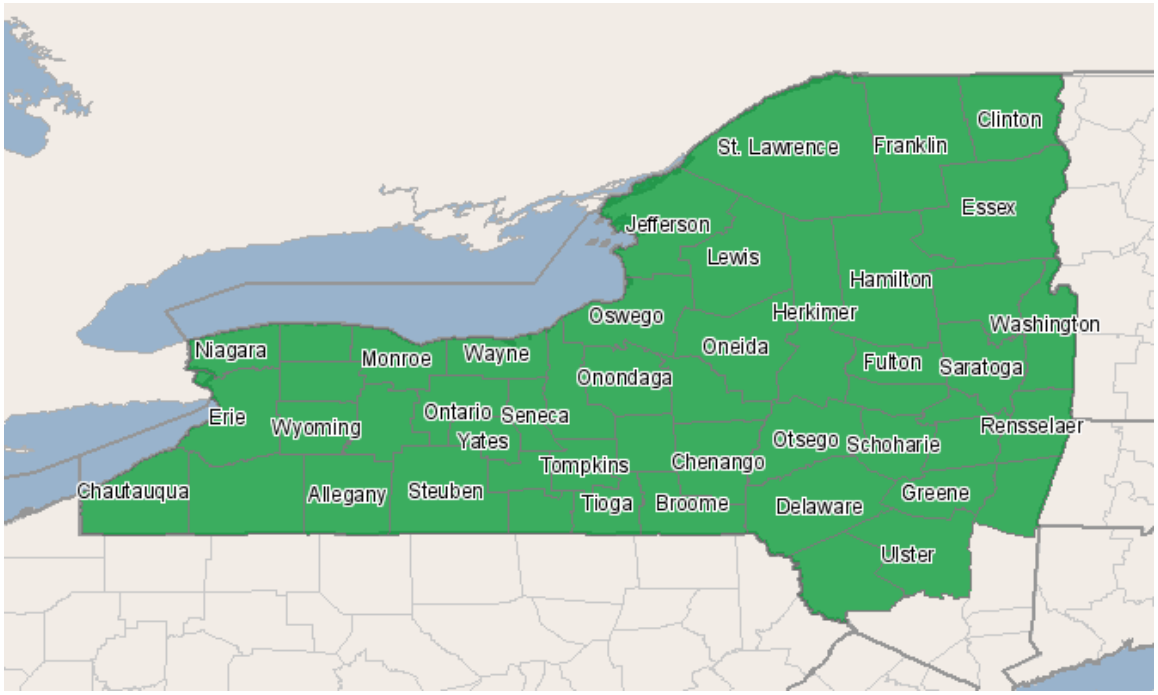
*Note: Industries with fewer than ten unemployed workers are not shown.

*Source: EMSI Complete Employment - 2nd Quarter 2009 v. 2*

The 2009 Comprehensive Economic Development Strategy (CEDS) completed for Niagara County stated that Niagara County is in a tie for 7th highest unemployment rate in 2008 when compared to all other New York State counties. The decline in heavy industry, which was originally attracted to the area because of the low cost of hydro power through the Niagara Power Project, has resulted in high unemployment rates in the manufacturing sector. In addition, the CEDS reports that people leaving to find new jobs, lowers the measurable effect of the loss of jobs on the unemployment rate. In other words, the unemployment rate is measured by numbers claiming unemployment benefits. When residents lose work and are forced to move out of the region they are no longer counted as being unemployed for Niagara County. The impact of loss of job opportunities has been immense on the region, and the 13% unemployment rate is only one way to show this information.

**Employment Growth**

The table on the following page shows the projected change in total private sector employment in the trade area, Upstate New York, New York State and the U.S. for the period 2009-2014. The 'Upstate New York' region is shown on the map below and includes all of New York State counties except: Bronx, Dutchess, Kings, New York, Orange, Putnam, Queens, Richmond, Rockland, Suffolk and Westchester. The data for upstate New York is separated to reduce the impact of the New York City metro area on the resulting information. The conditions of the NYC region are drastically different than Upstate and Western NY, so excluding the NYC data creates a more realistic and useful comparison.



The following table compares employment growth in four regions: Niagara County, Upstate NY, New York State and the United States. This allows for an analysis of the current state of employment growth within Niagara County and clearly identifies any issues which may be unique to the County in terms of job opportunities and growth expectations.

| Employment Growth Summary | | | | | |
|---|---|---|---|---|---|
| **Description** | **2009 Jobs** | **2014 Jobs** | **Change** | **% Change** | **EPW** |
| Niagara County Total | 80,798 | 80,599 | (199) | (0%) | $41,459 |
| Upstate Total | 3,323,326 | 3,444,094 | 120,768 | 4% | $45,291 |
| New York State Total | 10,197,823 | 10,785,479 | 587,656 | 6% | $66,721 |
| National Total | 164,738,962 | 179,686,037 | 14,947,075 | 9% | $50,847 |

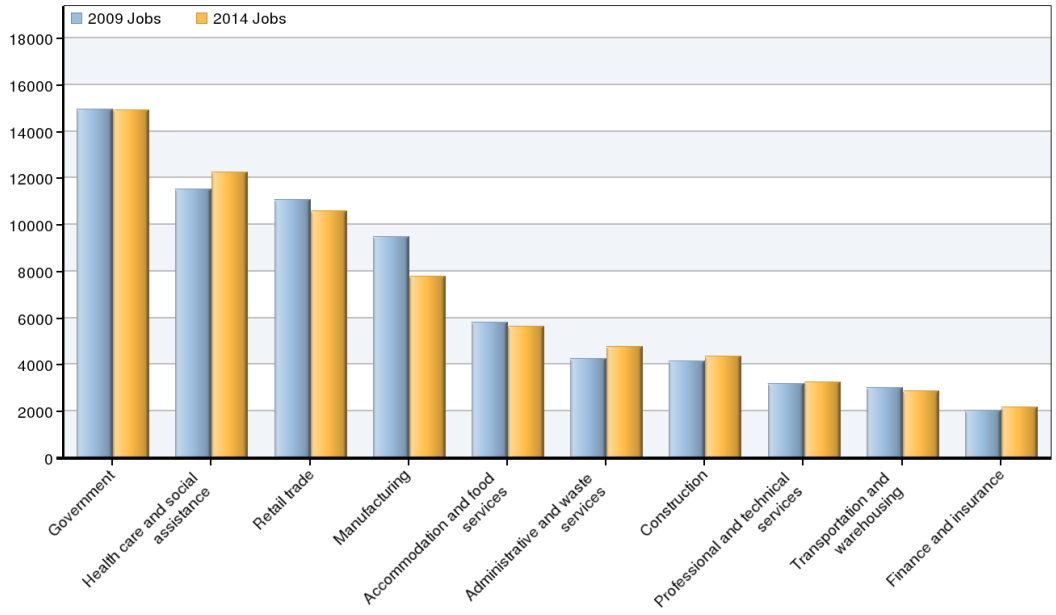
*Source: EMSI Complete Employment - 2nd Quarter 2009 v. 2*

Employment in Niagara County is projected to be stable over the next 5 years with approximately 80,000 total jobs, and a loss of 200 jobs. Upstate New York is growing slower than the State and the Nation as a whole, as indicated in the above graph and table. The average "earnings per worker" is significantly lower in Niagara County than the State Total, which is skewed by New York City wages, but it is also lower than the National Total.

## Employment by Industry

The graph and table below show projected employment changes by industry, average annual earnings per worker (EPW) and % change for each two-digit NAICS Code industry in 2009. As is common throughout New York State, *government* is the industry with the highest levels of employment, and is expected to remain stable. The *health care and social assistance industr*y is expected to add about 1,000 jobs in the next five years, with many of the other industries projecting losses. The *manufacturing industry* is going to take a large hit, with a projected 17% loss in employment. *Education* is expected to increase jobs, along with the *Administrative and waste services industry*, and *Utilities*.

***Top Employment Sectors by Industry – Niagara County***



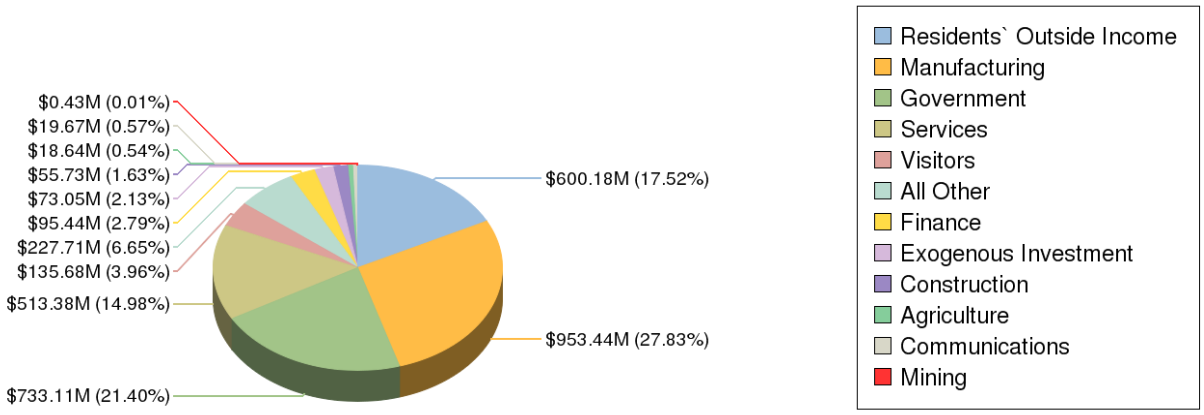

| Niagara County Employment Changes by Industry | | | | |
|---|---|---|---|---|
| **NAICS Code** | **Description** | **2009 Jobs** | **2014 Jobs** | **% Change** |
| 90 | Government | 14,968 | 14,928 | -0.27% |
| 62 | Health care and social assistance | 11,517 | 12,264 | 6.49% |
| 44-45 | Retail trade | 11,078 | 10,583 | -4.47% |
| 31-33 | Manufacturing | 9,474 | 7,783 | -17.85% |
| 72 | Accommodation and food services | 5,811 | 5,636 | -3.01% |
| 56 | Administrative and waste services | 4,251 | 4,775 | 12.33% |
| 23 | Construction | 4,137 | 4,366 | 5.54% |
| 54 | Professional and technical services | 3,195 | 3,262 | 2.10% |
| 48-49 | Transportation and warehousing | 2,999 | 2,887 | -3.73% |
| 52 | Finance and insurance | 2,048 | 2,182 | 6.54% |
| 61 | Educational services | 2,045 | 2,301 | 12.52% |
| 53 | Real estate and rental and leasing | 1,863 | 2,062 | 10.68% |
| 42 | Wholesale trade | 1,843 | 1,895 | 2.82% |
| 71 | Arts, entertainment, and recreation | 1,683 | 1,799 | 6.89% |
| 11 | Agriculture, forestry, fishing and hunting | 1,372 | 1,311 | -4.45% |
| 55 | Management of companies and enterprises | 994 | 992 | -0.20% |
| 22 | Utilities | 800 | 910 | 13.75% |
| 51 | Information | 687 | 628 | -8.59% |
| 21 | Mining | 34 | 38 | 11.76% |
| | **Total** | **80,798** | **80,599** | **-0.25%** |

Note: Highlighted industries are experiencing positive growth

*Source: EMSI Complete Employment - 2nd Quarter 2009 v. 2*

## Economic Base

Another way of portraying the regional economy is by determining what sectors and industries are responsible for bringing income to the region. Industries generally do this by exporting products and services to non-regional purchasers. This approach attempts to show which groups of industries really drive a region's economy; that is, which sectors bring the most dollars into a region, rather than circulating dollars that are already present.




Economic base sectors are groupings of broadly related industries with no claims made about their inter-dependence. In contrast, NAICS sectors are grouped by similar products and production processes and clusters assume a much tighter supply chain and/or labor market inter-dependence. Economic base sectors are created for convenience to describe a broad type of activity that brings money into a region, for example, "Manufacturing," or "Visitors." The following chart and table show how much of the region's earnings can be attributed to the activities of regional establishments in each sector. Note that the size of each of these sectors depends more on each one's export orientation than on each one's total employment.

2009 Economic Base - % of Niagara County's Earnings Attributed to Each Sector

| Niagara County - Economic Base | | | | | |
|---|---|---|---|---|---|
| Sector | Jobs | Earnings(K) | Jobs % | Earnings % | EPW(K) |
| Residents` Outside Income | 21,129 | $600,178 | 25% | 18% | $28 |
| Manufacturing | 17,977 | $953,436 | 21% | 28% | $53 |
| Government | 14,733 | $733,112 | 17% | 21% | $50 |
| Services | 13,934 | $513,381 | 16% | 15% | $37 |
| Visitors | 5,241 | $135,678 | 6% | 4% | $26 |
| All Other | 4,535 | $227,715 | 5% | 7% | $50 |
| Finance | 2,841 | $95,441 | 3% | 3% | $34 |
| Exogenous Investment | 1,977 | $73,052 | 2% | 2% | $37 |
| Construction | 1,393 | $55,735 | 2% | 2% | $40 |
| Agriculture | 847 | $18,639 | 1% | 1% | $22 |
| Communications | 566 | $19,675 | 1% | 1% | $35 |
| Mining | 12 | $431 | 0% | 0% | $35 |

*Source: EMSI Complete Employment - 2nd Quarter 2009 v2*

Residents' outside income, manufacturing and government make up the three largest income generating sectors in the trade area. The "Residents Outside Income" sector includes various sources of income from outside the region, which residents in turn spend in the regional economy. Examples of outside income include outside earnings (e.g., income of residents who commute or telecommute to an employer outside the region), capital or property income (investment dividends, royalties, rents), and transfer payments (unemployment benefits, welfare, Social Security payments, etc.). This sector accounts for 25% of the jobs and 18% of the earnings in Niagara County. This high percentage most likely illustrates that Niagara County residents are traveling outside of the County for their work, possibly to Buffalo which is in Erie County.

The manufacturing industry has historically been a major part of the Niagara County economy, with over 27% of the County's earnings attributed to this sector. A primary driver of manufacturing in Niagara County is the low-cost of hydro power; the County's Empower Program and New York Power Authority low-cost power programs provide some of the cheapest electricity in the nation. Companies of all sizes can utilize these programs for access low-cost electricity. The Niagara Power Project is the largest electricity producer in New York State and the third largest hydroelectric power plant in the U.S. In addition to low-cost power, existing infrastructure, history and availability of fresh water also make the County prime for manufacturing. It is also important to note that employees of the manufacturing industry have the highest earnings per worker.

Note that this graph and table includes ripple effects: the 17% of jobs that government supports are more than the jobs on the payroll of government entities. This is because government workers take their pay home from their work place and buy food, clothes, housing, entertainment, etc., which supports jobs in the industries that provide those goods and services. Those jobs are thus included in the government sector of the region's economic base because government is "responsible" for those jobs through its jobs multiplier.

The visitors sector attempts to quantify the jobs and earnings attributable to visitors in the region, which include both tourism-related visitors but also commuters and visitors that use the services provided in a more urban area. Niagara County also gets a good portion of jobs and earnings from Visitors. Niagara Falls, Niagara Falls Conference Center and the Seneca Niagara Casino & Hotel all attract tourists to the area, who spend money and create additional jobs and earnings for the County. Exogenous Investments represent investments in regional businesses coming from outside the region and constitute a very small percentage of the economic base in the trade area.

### Best Industries to Meet Niagara County Requirements[2]

The table below shows the purchasing needs of existing regional industries at the most detailed level available (6-digit NAICS code level), along with how much of those needs are satisfied inside and outside the region. The difference between these is the "import gap." For example, all regional industries (which includes private households) need to purchase $208 million in services supplied by 'Offices of physicians, except mental health', (the "$ Required" column), but are currently only purchasing $104.2 million from that regional service industry (the "$ Satisfied in Region" column), then the 'Office of physicians, except mental health' import gap is $104.3 million (the "Difference" column). Residents going elsewhere for services and companies purchasing from outside of the region can decrease the strength of the local economy. Importing goods and services means that residents' hard earned money is being spent outside of the region rather than recirculating within the local economy.

The ten regional industries with the largest import gaps are shown in the table below. These are the main industries that maybe should be developed or brought to the region to reduce the region's overall import dependence, because they represent industries that are relatively undersupplied in the region. All of the industries listed below are present in the Niagara County trade area, but there is room to expand current operations or target additional companies.

**Best Industries To Meet Regional Requirements**

| NAICS Code | Description | $ Required (K) | $ Satisfied in Region (K) | Difference (K) | In Region |
|---|---|---|---|---|---|
| 522110 | Commercial banking | $142,483 | $5,286 | $137,197 | yes |
| 621111 | Offices of physicians, except mental health | $208,584 | $104,249 | $104,336 | yes |
| 551114 | Managing offices | $146,949 | $44,144 | $102,804 | yes |
| 325412 | Pharmaceutical preparation manufacturing | $79,197 | $0 | $79,197 | yes |
| 524126 | Direct property and casualty insurers | $83,147 | $5,388 | $77,759 | yes |
| 541110 | Offices of lawyers | $93,392 | $20,350 | $73,042 | yes |
| 541710 | Physical, engineering and biological research | $68,820 | $1,991 | $66,829 | yes |
| 611310 | Colleges, universities, and professional schools | $71,394 | $5,745 | $65,649 | yes |

[2] The "Best Industries to Meet Regional Requirements" analysis is based on EMSI's input-output model which uses the national input-output matrix provided by the federal Bureau of Economic Analysis. This is combined with the national Total Gross Output, the regional Total Gross Output, the land area of the subject region, regional dividends, interest, rent and transfers data and regional in/out commuter patterns in order to calculate regional requirements, imports and exports. After using matrix algebra to calculate the regional multiplier, the resulting matrix is multiplied by the sales vector and converted back to jobs or earnings. Specifically, this data comes from the U.S. Department of Commerce, Bureau of Economic Analysis, and Industry Economic Accounts: Benchmark & Annual Input-Output (I-O) Accounts.

Additional information regarding sales leakages and surpluses can be found in the Market Analysis section, where specific industries and sectors are identified as having potential for success in the North Tonawanda BOA Trade Area market.

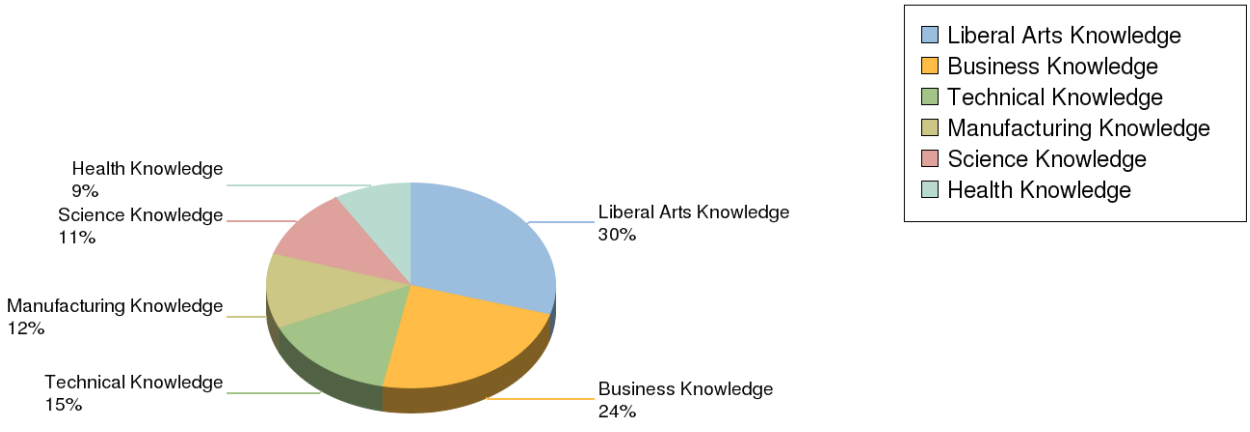
**Education Level and Knowledge Base**

The following outlines the levels of education of the residents in Niagara County as compared to the State and Nation. Niagara County has a lower percentage of residents aged 25 and above that have some college education or postgraduate education. This could indicate that those with higher levels of education are leaving the area to get better jobs, an idea discussed in the 2009 CEDS.

| Education Levels | | | |
|---|---|---|---|
| | Niagara County % of 25+ Cohort | State % of 25+ Cohort | Nation % of 25+ Cohort |
| 2009 Population with Some College Education | 50.65% | 55.58% | 55.13% |
| 2009 Population with a Postgraduate Education | 7.99% | 13.38% | 9.74% |

*Source: EMSI Complete Employment - 2nd Quarter 2009 v2*

The following pie chart provides a clear illustration of the current knowledge base in Niagara County. 30% of residents have Liberal Arts knowledge following by 24% with Business knowledge. It is important to note that only 9% of residents have Health knowledge. Health Care is a projected growth industry for the Trade Area and region, and so it may be necessary to increase training opportunities in order to capitalize on this industry growth.

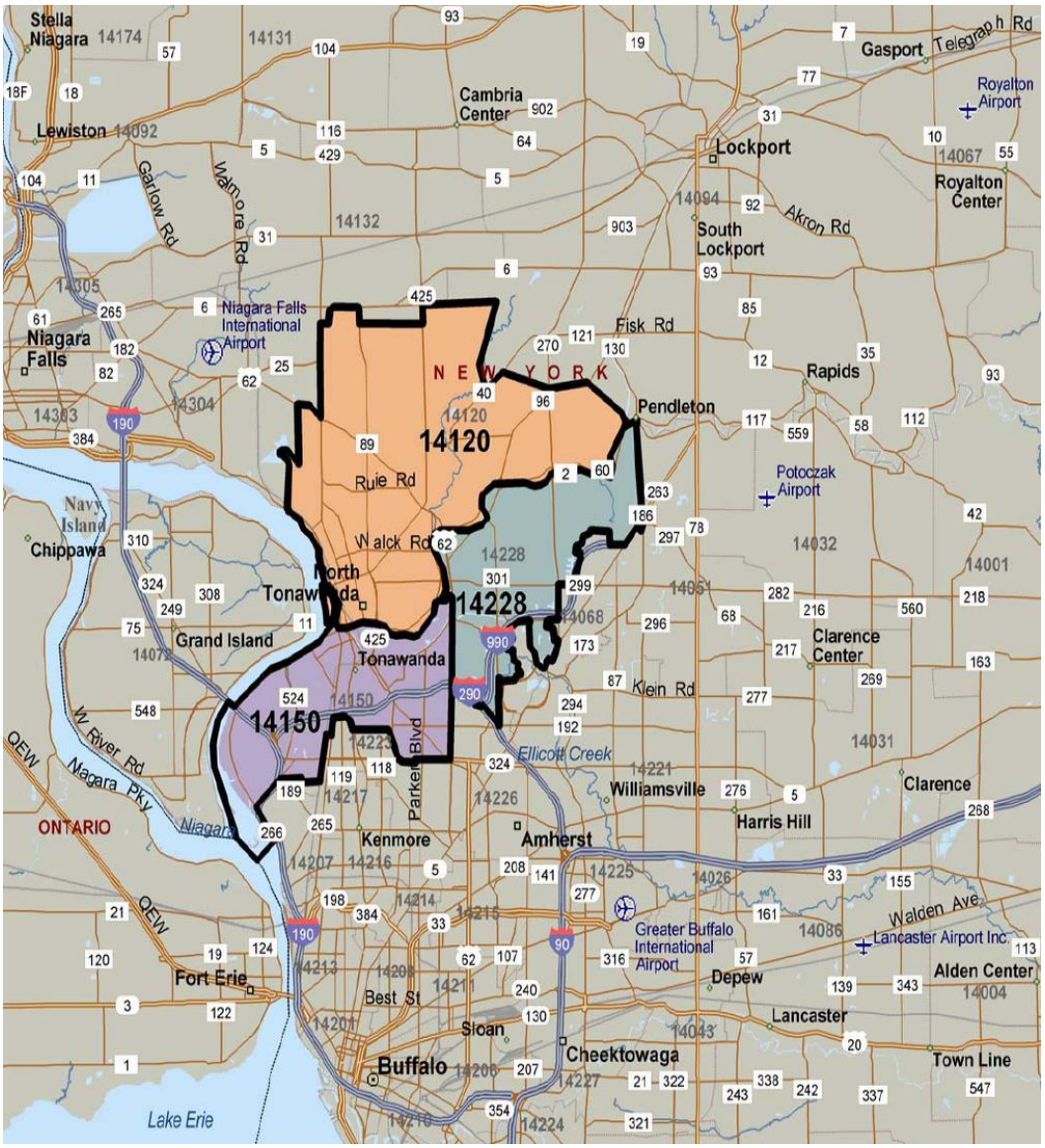



*Source: EMSI Complete Employment - 2nd Quarter 2009 v. 2*

# DEMOGRAPHIC ANALYSIS

## Introduction

As part of the Market Trend Analysis for the Brownfield Opportunity Area (BOA) Pre-Nomination Study completed for the City of North Tonawanda, Camoin Associates analyzed regional demographic, economic and market trends and projections to illustrate how these factors may impact the local economy and redevelopment of the BOA. To study the local factors which would impact local reuse and redevelopment, three zip codes were deemed the "Trade Area" (14150, 14120, and 14228) and analyzed. Using this Trade Area allowed us to analyze the current trends within the region. Below is a map of the Trade Area, the BOA is located within zip code 14120.



The demographic data in this report were purchased from ESRI Business Analyst Online (ESRI) and Economic Modeling Specialists, Inc. (EMSI). ESRI's base data is the 2000 Census and it uses proprietary statistical models and updated data from the U.S. Census Bureau, the U.S. Postal Service and various other sources to project current statistics and future trends.

EMSI data are compiled from several sources, including the U.S. Census Bureau and U.S. Departments of Health and Labor using specialized proprietary processes and models to estimate current statistics and predict future trends.

## Basic Demographic Existing Conditions and Trends

The data show that total population in the Trade Area has been decreasing steadily since 2000 and will continue to decrease over the next five years at a slightly quicker pace. Other demographic indicators which are decreasing include the number of households, families and renter occupied housing units. The only indicator which is seeing an increase in the next five years is the number of owner occupied housing units.

| Basic Demographic Indicators | | | | | |
|---|---|---|---|---|---|
| | 2000 | 2009 | 2013 | 2000-2009 % Change | 2009-2014 % Change |
| Population | 106,009 | 105,199 | 103,450 | -0.76% | -1.66% |
| Households | 43,600 | 44,128 | 43,667 | 1.21% | -1.04% |
| Families | 28,654 | 28,394 | 27,838 | -0.91% | -1.96% |
| Owner Occupied Housing Units | 30,379 | 30,039 | 30,961 | -1.12% | 3.07% |
| Renter Occupied Housing Units | 13,221 | 14,089 | 12,706 | 6.57% | -9.82% |
| Median Age | 39.1 | 41.4 | 41.9 | – | – |

*Source: ESRI Forecasts for 2009 and 2014*

The Niagara County Comprehensive Economic Development Strategy (CEDS) which was completed in 2009, states that the County-wide population is also decreasing slowly. Niagara County's population has been declining for over 40 years from a peak of 242,269 in 1960. There was a slight increase noted between 2007 and 2008, but other than that the population had declined by 9.2% since 1960. The slight increase could indicate that that trend is starting to reverse.

The table below shows median household income in 2009 and 2014 for the Trade Area, Upstate NY and the United States. The Trade Area median income is growing more quickly as compared to Upstate and the rest of the United States.

| Median Household Income | | | |
|---|---|---|---|
| | 2009 | 2014 | % Change |
| Study Area | $54,353 | $58,817 | 8.2% |
| Upstate | $51,013 | $54,588 | 7.0% |
| USA | $54,719 | $56,938 | 4.1% |

*Source: ESRI Forecasts for 2009 and 2014*

The following table compares the Trade Area to upstate New York and the United States in terms of the annual growth rate of various demographic indicators. All indicators for the Trade Area are expected to grow at a rate below that of upstate NY and the USA, except the median household income indicator, which shows the Trade Area's income growing almost double the percentage points of the USA.

| Projected Annual Change 2009-2014 | | | |
|---|---|---|---|
| | Trade Area | Upstate NY | USA |
| Population | -0.33% | -0.10% | 0.91% |
| Households | -0.21% | 0.01% | 0.94% |
| Families | -0.39% | -0.15% | 0.74% |
| Owner HHs | 0.61% | 0.86% | 1.19% |
| Median Household Income | 1.59% | 1.36% | 0.80% |

*Source: ESRI Forecasts for 2009 and 2014*

**Household Income Distribution**

The table and graph below show the projected change in household income distribution in the Trade Area between 2000, 2009 and 2014. The household income distribution within the Trade Area is projected to stay relatively stable over the next five years with some slight increases in the number of households making over $50,000 a year. This increase is likely a normal increase which happens over time, but it is important to note that the increase is less dramatic than in previous periods as a reflection of the current unique economic times (note larger changes occurring between 2000 and 2009).

| Trade Area Households by Income | | | |
|---|---|---|---|
| | 2000 | 2009 | 2014 |
| < $15,000 | 14.4% | 9.6% | 9.3% |
| $15,000 - $24,999 | 13.6% | 9.9% | 8.7% |
| $25,000 - $34,999 | 13.2% | 11.0% | 9.1% |
| $35,000 - $49,999 | 18.8% | 15.1% | 15.0% |
| $50,000 - $74,999 | 21.0% | 23.2% | 24.8% |
| $75,000 - $99,999 | 11.3% | 17.1% | 17.8% |
| $100,000 - $149,999 | 6.1% | 10.4% | 10.8% |
| $150,000 - $199,999 | 1.0% | 2.5% | 3.0% |
| $200,000+ | 0.5% | 1.2% | 1.5% |

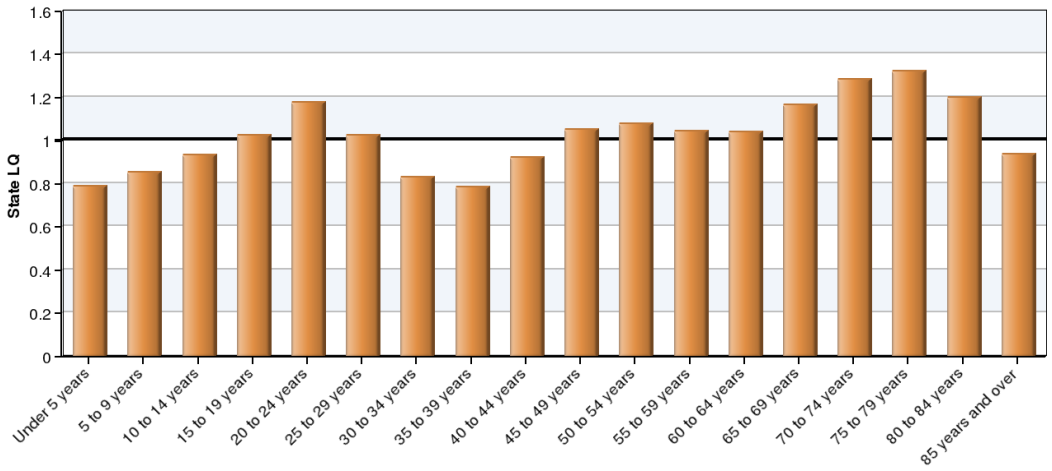
*Source: ESRI Forecasts for 2009 and 2014*

**Age Distribution**

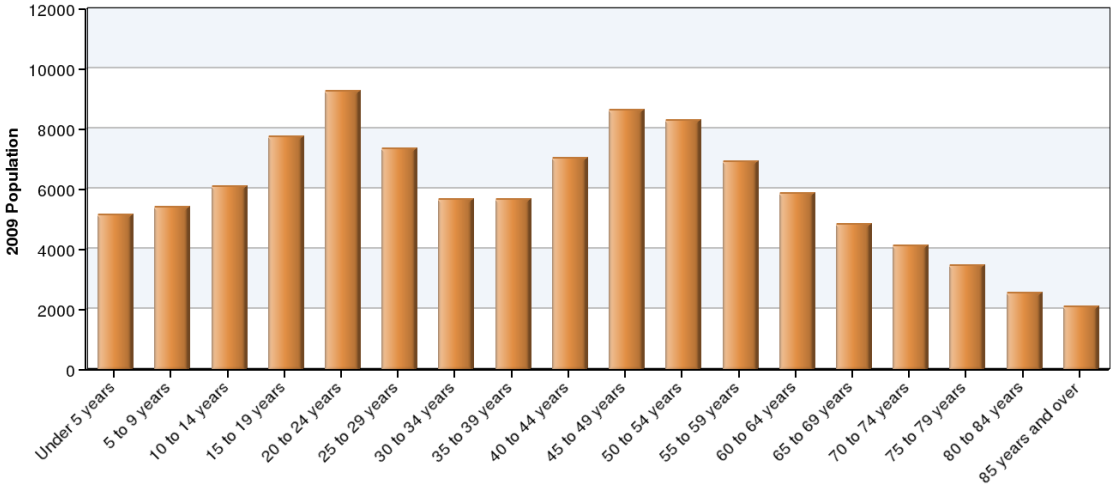
The bar graph below shows the results of a Location Quotient (LQ) analysis of age groups in the Trade Area compared to the statewide population. The LQ analysis compares the percentage of the Trade Area's population in each age group to the percentage of the statewide population in each age group. The black line represents the

statewide distribution; the orange bars show how closely the percentage of each age group in the Trade Area resembles the statewide distribution. It is considered to be statistically significant if the LQ is above 1.2 or below .8.

For example, there is a significantly larger portion of the Trade Area population in age groups 70-80. Conversely, there is a significantly lower percentage of the Trade Area's population in the age groups 30-40 years old than statewide. In general, this graph shows that the Trade Area's age distribution is similar to the State in most age groups.

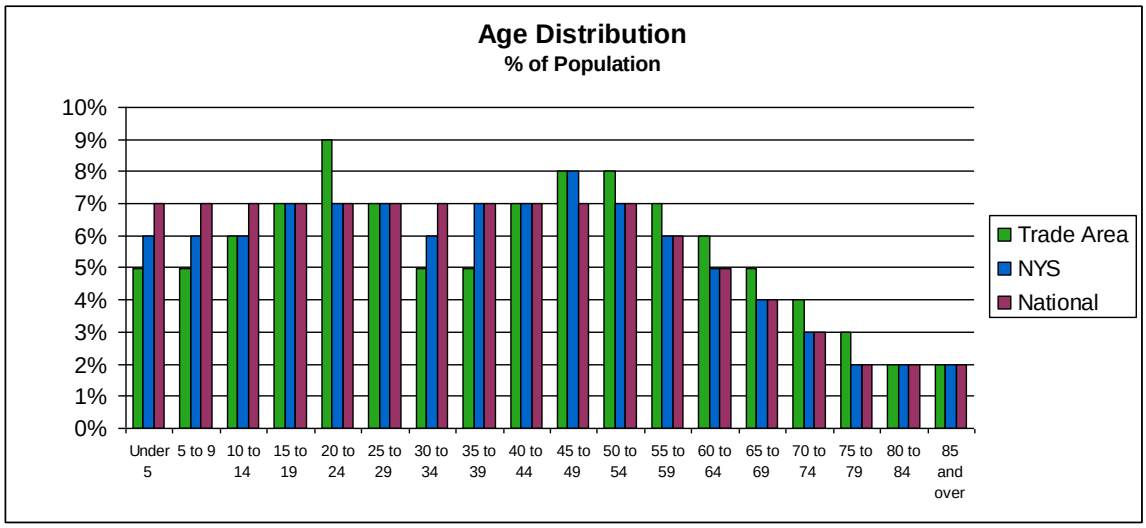



The graph below shows the current age distribution in the Trade Area for 2009. The largest age groups in the following order are 20-24; 45-49; and 50-54.




The following bar graph shows the percentage of the population in the different age groups as a percentage of the whole population. The nation is relatively stable with about 7% of the population in each age group until 55 when it starts to decline, but the State and Trade Area percentages show more of a variety. The Trade Area shows a high percentage of individuals in the 20-24 age range and fewer in the 30-40 age range. The shape of this bar graph is

similar to communities around the country with a spike near the age of the baby boomers (45-60) and another spike near the age of the baby boomers' children (20-30).




## Racial Composition

The Trade Area is primarily composed of residents who identify themselves as White alone. Following Caucasian, the next two largest racial groups include those who identify themselves as Black alone and Asian alone. Over the next five years this racial composition will remain stable, with a slight increase in those identified as two or more races and an increase in those from Hispanic origin.

| Trade Area Racial Composition | | | | |
|---|---|---|---|---|
| | 2009 | | 2014 | |
| **Race and Ethnicity** | **Number** | **Percent** | **Number** | **Percent** |
| White Alone | 97,398 | 92.6% | 94,297 | 91.2% |
| Black Alone | 2,860 | 2.7% | 3,424 | 3.3% |
| American Indian Alone | 382 | 0.4% | 401 | 0.4% |
| Asian Alone | 2,865 | 2.7% | 3,356 | 3.2% |
| Pacific Islander Alone | 26 | 0.0% | 28 | 0.0% |
| Some Other Race Alone | 437 | 0.4% | 497 | 0.5% |
| Two or More Races | 1,231 | 1.2% | 1,447 | 1.4% |
| Hispanic Origin (Any Race) | 1,705 | 1.6% | 1,935 | 1.9% |

*Source: ESRI Forecasts for 2009 and 2014*

## Employment

The following chart shows that the most common occupations for residents living in the City of North Tonawanda BOA Trade Area. The occupation with the most number of employees is the *Office and Administrative Support*

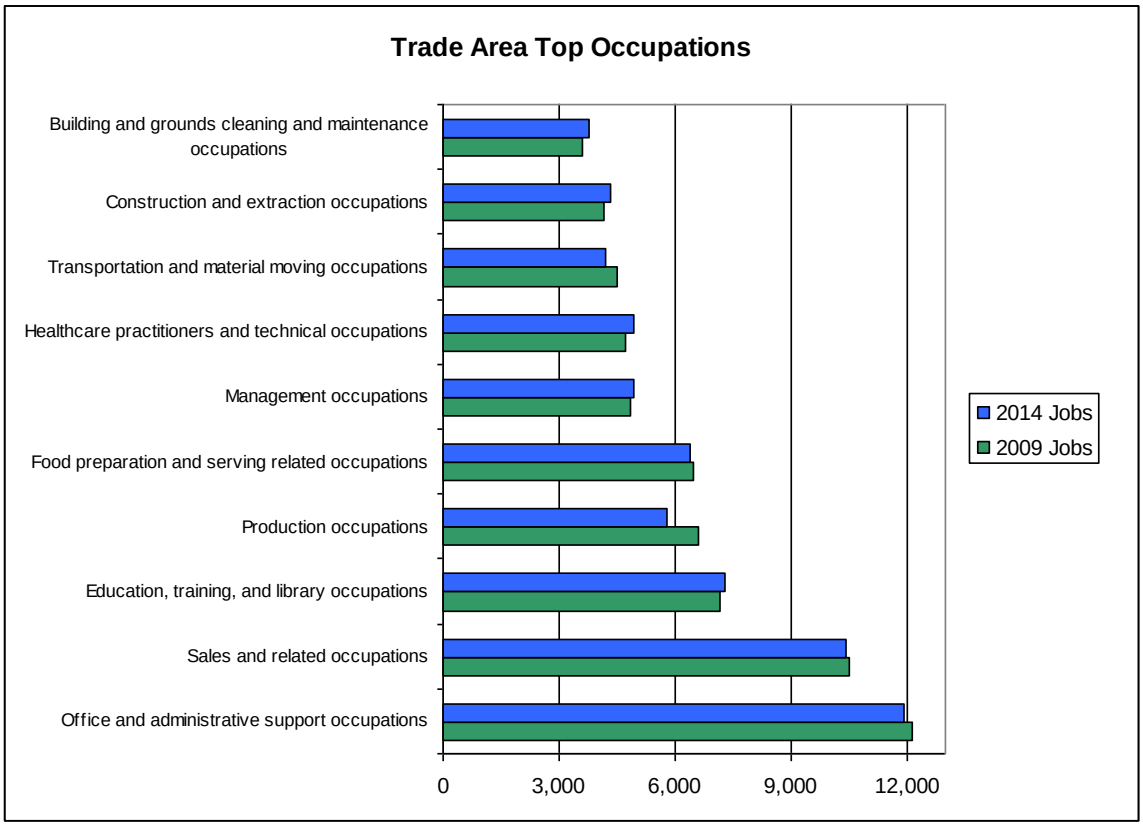
*Occupations* sector. The second most common occupation is the *Sales and Related Occupation* and the third is employment in the *Education, Training and Library Occupation.*

Employment in the *Production Occupation* is expected to decline by 12% over the next 5 years, or lose 816 workers. Also expected to decline in the next few years:

- *Transportation and Material Moving Occupations*.

The fastest growing occupations are projected to be in *Healthcare Practitioners and Technical Occupations* field. Also growing are:

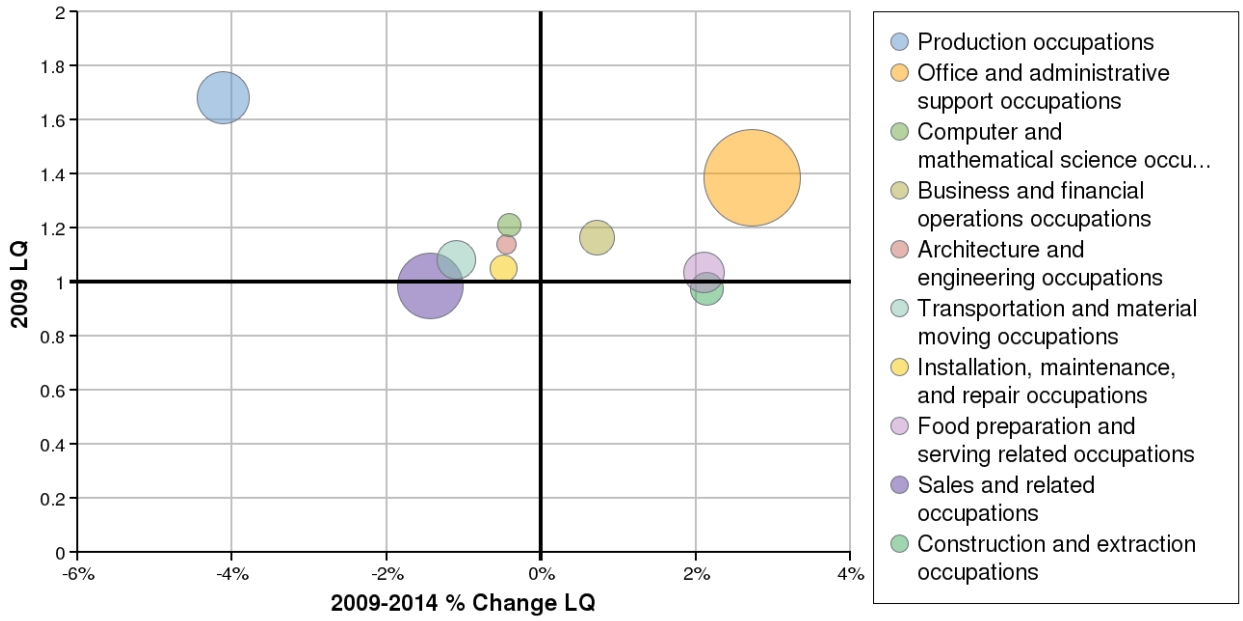
- Building and Grounds Cleaning and Maintenance Occupations
- Construction and Extraction Occupations
- Management Occupations
- Education, Training and Library Occupations.




The following graph illustrates the location quotient (LQ) of the top occupations in the Trade Area. This graph complements the bar graph above because it provides a comparison of the Trade Area occupations to the National average employment in those occupations. LQ is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the Nation. It can reveal what makes a particular region unique in comparison to the national average.

This graph is read by looking at the size and location of the various bubbles; LQ's higher than 1.2 or lower than .8 are considered statistically significant. Bubbles in the top right quadrant have a high LQ that is growing. For example, the Trade Area has a relatively high concentration of *Office and Administrative Support Occupation* workers compared to the nation and that concentration is anticipated to strengthen through 2014. On the other hand, the Trade Area also has a proportionally high number of people working in *Production Occupation*, but over the next 5 years the LQ is expected to decrease substantially. The size of the bubble relates to the number of people in each occupation, therefore this graph also depicts the high number of people working in *Sales and Related Occupations*.

LQ analysis is one tool used to identify potential opportunities or targeted occupations for further investigation, and can be used to identify particular occupations or clusters which are particularly strong in an area. This LQ analysis indicated most occupations in the Trade Area had an LQ between 0.8 and 1.2, and therefore employment concentration was not significantly different than the concentration for the Nation. However, there is a large and growing concentration of employees in Office and Administrative Support Occupations which could present an opportunity for the City as it shifts away from production industries and towards more professional service industries.




*Bubble size represents 2009 jobs in each occupation.

# RESIDENTIAL ANALYSIS

## Introduction

The residential market analysis compares existing conditions and projected trends in residential development in the Trade Area to the demographic data collected in the previous section. This information will help to identify potential development types that will serve currently unmet needs in the BOA as well as form a preliminary assessment of the feasibility and marketability of those development types.

The housing and rental data below were purchased from ESRI Business Analyst Online (ESRI). ESRI's base data is the 2000 Census and its uses proprietary statistical models and updated data from the U.S. Census Bureau, the U.S. Postal Service and various other sources to estimate current statistics and project future trends. Data retrieved from ESRI was defined by the North Tonawanda BOA Trade Area (Zip Codes: 14120, 14228, and 14150).

### Existing Housing Stock

The table below outlines the occupancy status of housing units in the Trade Area. The existing housing stock is expected to stay relatively stable with some slight increases in owners and decrease in renters. Approximately 65% of available housing will be occupied by the owners in 2014 and 27% occupied by renters. There is a projected increase in the number of vacant units between 2009 and 2014. In contrast to the increase in vacant units, there is projected to be an increase of around 200 new units in the next five years.

| Trade Area Residential Unit Status | | | | | | |
|---|---|---|---|---|---|---|
| | 2000 | | 2009 | | 2014 | |
| Total Housing Units | 45,575 | | 47,119 | | 47,318 | |
| Status | | | | | | |
| | 2000 | | 2009 | | 2014 | |
| | Number | Percent | Number | Percent | Number | Percent |
| Owner Occupied | 30,379 | 66.7% | 30,039 | 63.8% | 30,961 | 65.4% |
| Renter Occupied | 13,221 | 29.0% | 14,089 | 29.9% | 12,706 | 26.9% |
| Vacant | 1,975 | 4.3% | 2,991 | 6.3% | 3,651 | 7.7% |

*Source: ESRI Forecasts for 2009 and 2014*

Of the residential units in the Trade Area, over 70% were built prior to 1969, with the median year the structure was built being 1957. This shows that the current housing stock is quite old and most likely in need of repair and updates. Many younger people and families are looking for homes that have some of the newer features which will make attracting them to the City of North Tonawanda and the BOA Trade Area more difficult due to the age of the current housing stock.

The table below compares other regional cities to the City of North Tonawanda to showcase similarities and differences in terms of housing. The City of North Tonawanda has a significantly higher percentage of owner occupied units as compared to the City of Buffalo and the City of Niagara Falls. Overall, the City of North Tonawanda and the BOA area is doing well in terms of maintaining a low percentage of vacant units and a pattern of strong homeownership as compared to Buffalo and Niagara Falls.

| 2009 Residential Unit Occupancy Status | | | | | | |
|---|---|---|---|---|---|---|
| | City of North Tonawanda | | City of Buffalo | | City of Niagara Falls | |
| | Number | Percent | Number | Percent | Number | Percent |
| Owner Occupied | 18,519 | 67.9% | 49,819 | 34.2% | 12,941 | 46.0% |
| Renter Occupied | 7,095 | 26.0% | 64,102 | 44.0% | 9,587 | 34.1% |
| Vacant | 1,646 | 6.0% | 31,825 | 21.8% | 5,598 | 19.9% |

*Source: ESRI Forecast 2009 and 2014*

The report compiled by Clough Harbor and Associates entitled *Niagara Communities Comprehensive Plan 2030,* provides a breakdown of the vacancy rates in Niagara County. The map that they prepared shows that the highest levels of vacancy rates in the City of North Tonawanda exist within the BOA area, closer to the waterfront, although these rates are not has high as in the City of Niagara Falls or some communities located along Lake Ontario.

To compare the existing housing stock in the Trade Area to that of upstate New York[3] and the United States, the table below breaks out the structure type of all occupied residential buildings. The Trade Area has a higher percentage of single family detached structures as compared to upstate NY and the United States. The Trade Area also has more residential structures with 5-9 units than the rest of upstate NY or the US. Additionally, there are substantially fewer mobile home units as a percentage of all units in the Trade Area as compared to Upstate and the rest of the United States.

| Occupied Housing by Units in Structure | | | | | | |
|---|---|---|---|---|---|---|
| | Trade Area | | Upstate NY | | USA | |
| | Number | Percent | Number | Percent | Number | Percent |
| 1, Detached | 29,366 | 67.3% | 1,535,856 | 62.9% | 64,787,510 | 61.4% |
| 1, Attached | 1,084 | 2.5% | 65,431 | 2.7% | 5,907,804 | 5.6% |
| 2 | 4,532 | 10.4% | 272,114 | 11.1% | 4,466,529 | 4.2% |
| 3 to 4 | 3,257 | 7.5% | 149,747 | 6.1% | 4,905,354 | 4.7% |
| 5 to 9 | 2,749 | 6.3% | 108,412 | 4.4% | 4,820,542 | 4.6% |
| 10 to 19 | 1,154 | 2.6% | 55,682 | 2.3% | 4,116,925 | 3.9% |
| 20 to 49 | 349 | 0.8% | 36,201 | 1.5% | 3,457,019 | 3.3% |
| 50 or More | 957 | 2.2% | 62,576 | 2.6% | 5,523,703 | 5.2% |
| Mobile Home | 154 | 0.4% | 155,115 | 6.4% | 7,384,276 | 7.0% |
| Other | 7 | 0.0% | 608 | 0.0% | 110,439 | 0.1% |

*Source: ESRI Forecast 2009 and 2014*

[3] The 'Upstate New York' region does not include the following New York counties: Bronx, Dutchess, Kings, Nassau, New York, Orange, Putnam, Queens, Richmond, Rockland, Suffolk or Westchester, reducing the impact that the NYC metro area has and allowing educated comparisons.

## Current Residential Value

Owner occupied units in the Trade Area have been generally increasing in value. In 2000, the median home value of owner occupied units in the Trade Area was just $86,000 but that value increased substantially by 2009. The table below shows the projected increase in housing value by 2014. As of 2009, a majority of the houses (82%) were valued between $100,000 and $250,000 and this is projected to remain stable through 2014.

| Trade Area Owner Occupied Unit Value | | |
|---|---|---|
| | 2009 | 2014 |
| Median Value | $147,171 | $177,561 |
| Average Value | $158,351 | $191,743 |

*Source: ESRI Forecasts 2009 and 2014*

The median and average value of owner occupied housing units in the Trade Area is slightly lower than those in upstate NY and substantially lower than owner occupied units in the United States.

| Owner Occupied Unit Value Comparison | | | |
|---|---|---|---|
| | Trade Area | Upstate NY | USA |
| Median Value | $147,171 | $148,037 | $162,279 |
| Average Value | $158,351 | $174,878 | $229,998 |

*Source: ESRI Forecasts 2009 and 2014*

Compared to other regional cities, the City of North Tonawanda and the BOA are more expensive for owning and renting, with higher median mortgage payments and rent payments. Compared to the rest of upstate NY and the US, rent and mortgage payments are lower in the Trade Area.

| Median Monthly Payment Comparison | | | | | |
|---|---|---|---|---|---|
| | City of North Tonawanda | City of Buffalo | City of Niagara Falls | Upstate NY | USA |
| Median Monthly Mortgage Payment | $953 | $824 | $821 | $1,013 | $1,088 |
| Median Monthly Rent Payment | $476 | $364 | $342 | $433 | $519 |

*Source: ESRI Forecasts 2009 and 2014*

The following table shows a breakdown of the monthly mortgage costs for owner occupied housing units. The highest percentage of homeowners pay no mortgage, signaling that many homeowners have lived in their home long enough to pay off their mortgage, or have inherited the home. After the group paying no mortgage, the second highest percentage of homeowners pays between $1,000 and $1,249 each month.

| Monthly Mortgage Payments for Owner Occupied Housing Units in the Trade Area | | |
|---|---|---|
| | Number | Percent |
| $200 - $299 | 25 | 0.1% |
| $300 - $399 | 125 | 0.5% |
| $400 - $499 | 444 | 1.6% |
| $500 - $599 | 813 | 3.0% |
| $600 - $699 | 1,277 | 4.6% |
| $700 - $799 | 1,820 | 6.6% |
| $800 - $899 | 2,007 | 7.3% |
| $900 - $999 | 2,472 | 9.0% |
| $1000 - $1249 | 4,905 | 17.8% |
| $1250 - $1499 | 2,186 | 7.9% |
| $1500 - $1999 | 1,464 | 5.3% |
| $2000 - $2499 | 307 | 1.1% |
| $2500 - $2999 | 53 | 0.2% |
| $3000+ | 35 | 0.1% |
| With No Mortgage | 9,581 | 34.8% |

*Source: ESRI Forecasts 2009 and 2014*

Approximately 30% of the residents living within the Trade Area rent their homes, and the table below outlines the monthly rent cost. Generally, residents living in renter-occupied housing units are paying between $350 and $600 per month, with very few paying over $1,500.

| Monthly Rent Payments for Renter Occupied Housing Units in the Trade Area | | |
|---|---|---|
| | Number | Percent |
| < $100 | 112 | 0.9% |
| $100 - $149 | 328 | 2.5% |
| $150 - $199 | 368 | 2.8% |
| $200 - $249 | 360 | 2.7% |
| $250 - $299 | 560 | 4.3% |
| $300 - $349 | 1,018 | 7.7% |
| $350 - $399 | 1,386 | 10.5% |
| $400 - $449 | 1,456 | 11.1% |
| $450 - $499 | 1,425 | 10.8% |
| $500 - $549 | 1,356 | 10.3% |
| $550 - $599 | 1,486 | 11.3% |
| $600 - $649 | 1,200 | 9.1% |
| $650 - $699 | 868 | 6.6% |
| $700 - $749 | 490 | 3.7% |
| $750 - $799 | 64 | 0.5% |
| $800 - $899 | 127 | 1.0% |
| $900 - $999 | 16 | 0.1% |
| $1000 - $1249 | 42 | 0.3% |
| $1250 - $1499 | 38 | 0.3% |
| $1500 - $1999 | 54 | 0.4% |
| $2000 + | 50 | 0.4% |

*Source: ESRI Forecasts 2009 and 2014*

**Residential Market Outlook**

In addition to utilizing ESRI data, Camoin Associates also gathered information from a CB Richard Ellis report that highlights market trends for the Buffalo Multi-Housing (apartment) market[4]. This data included information on the Suburban market, which includes the City of North Tonawanda and the North Tonawanda BOA Trade Area.

As the country continues to rebuild after the crash of the housing market, many markets have seen a decline in real estate values, a tightening of the credit market and many more homeowners have been pressured to sell quickly. The Western NY housing market experienced significantly less sever impacts of the housing crisis than other parts of the country and housing prices have remained relatively stable. The following is information regarding multi-family transactions occurring in Niagara County in the past year.

| Niagara County Sales Transactions | | | |
|---|---|---|---|
| Area | # of Properties | # of Units | Average Price Per Unit |
| City of North Tonawanda | 26 | 164 | $34,215 |
| City of Niagara Falls | 26 | 148 | $15,803 |
| West Niagara County | 13 | 176 | $35,869 |
| Lockport & all Others | 32 | 293 | $26,957 |

*Source: CB Richard Ellis MarketView Buffalo Multi-housing Annual 2008/2009 Report*

Some of the primary trends in multi-housing projects in the Buffalo area include some large scale senior housing developments, including a 164 unit facility in the Town of Tonawanda, and student housing projects including a 140 student project in Cheektowaga. Many of the student housing projects are occurring close to the many colleges and universities in the area, including Buffalo State, Canisius, Medaille and the State University at Buffalo. There are also some unique projects occurring in the City of Buffalo including the renovation of older buildings into loft like apartments and condominiums.

A unique residential project occurring in the City of North Tonawanda is the reuse of the Remington Rand building, which is being redeveloped as a mixed-use residential and commercial complex. The project will be located on the waterfront within the BOA area and within walking distance to downtown. This project will include 81 units of live-work space for rent ranging from $1,000 - $3,500 a month and will offer City residents amenities such as a yoga studio, restaurant and hair salon.

[4] CB Richard Ellis. Market View Buffalo Office. Annual 2008/2009

# RETAIL MARKET ANALYSIS

## Introduction

A retail market analysis is used to examine current retail sales and demand within a particular region. The goal of this process is to identify the unique characteristics or niche markets that the area may have which can be developed or built upon. In addition to identifying niche markets for further development, the retail market analysis can pinpoint retail services which are missing from the region, resulting in residents going elsewhere to purchase goods and services. The retail market analysis also outlines consumer spending habits within the region, identifies retail demand and household characteristics. The following is an analysis of the North Tonawanda BOA Trade Area (Zip Codes: 14120, 14228, and 14150) retail market characteristics.

### Retail Leakage/Surplus Analysis

The table below shows existing retail sales ("Supply") in the trade area and retail potential ("Demand") broken down by industry. Where Demand exceeds Supply, a retail gap results, which identifies a potential opportunity for retail growth.

| Industry Group | Retail Potential (Demand) | Retail Sales (Supply) | Retail Gap | Number of Businesses |
|---|---|---|---|---|
| **Motor Vehicle & Parts Dealers (NAICS 441)** | **$214,603,656** | **$91,388,350** | **$123,215,306** | **66** |
| Automobile Dealers (NAICS 4411) | $183,263,942 | $74,846,849 | $108,417,093 | 22 |
| Other Motor Vehicle Dealers (NAICS 4412) | $17,439,892 | $7,594,712 | $9,845,180 | 14 |
| Auto Parts, Accessories, and Tire Stores (NAICS 4413) | $13,899,822 | $8,946,789 | $4,953,033 | 30 |
| | | | | |
| **Furniture & Home Furnishings Stores (NAICS 442)** | **$30,827,255** | **$15,230,831** | **$15,596,424** | **30** |
| Furniture Stores (NAICS 4421) | $16,990,852 | $8,484,371 | $8,506,481 | 10 |
| Home Furnishings Stores (NAICS 4422) | $13,836,403 | $6,746,460 | $7,089,943 | 20 |
| | | | | |
| **Electronics & Appliance Stores (NAICS 443/NAICS 4431)** | **$33,134,347** | **$34,746,482** | **($1,612,135)** | **52** |
| | | | | |
| **Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)** | **$38,301,717** | **$51,473,869** | **($13,172,152)** | **57** |
| Building Material and Supplies Dealers (NAICS 4441) | $34,147,786 | $49,127,501 | ($14,979,715) | 46 |
| Lawn and Garden Equipment and Supplies Stores (NAICS 4442) | $4,153,931 | $2,346,368 | $1,807,563 | 11 |
| | | | | |
| **Food & Beverage Stores (NAICS 445)** | **$187,878,923** | **$227,390,243** | **($39,511,320)** | **51** |
| Grocery Stores (NAICS 4451) | $167,959,830 | $215,770,976 | ($47,811,146) | 29 |
| Specialty Food Stores (NAICS 4452) | $7,378,956 | $6,350,310 | $1,028,646 | 13 |
| Beer, Wine, and Liquor Stores (NAICS 4453) | $12,540,137 | $5,268,957 | $7,271,180 | 9 |
| | | | | |
| **Health & Personal Care Stores (NAICS 446/NAICS 4461)** | **$42,367,025** | **$25,930,711** | **$16,436,314** | **49** |
| | | | | |
| **Gasoline Stations (NAICS 447/NAICS 4471)** | **$137,581,013** | **$79,550,921** | **$58,030,092** | **25** |
| | | | | |
| **Clothing and Clothing Accessories Stores (NAICS 448)** | **$49,128,523** | **$15,145,506** | **$33,983,017** | **40** |
| Clothing Stores (NAICS 4481) | $38,903,540 | $11,082,039 | $27,821,501 | 23 |
| Shoe Stores (NAICS 4482) | $4,936,726 | $1,034,416 | $3,902,310 | 6 |
| Jewelry, Luggage, and Leather Goods Stores (NAICS 4483) | $5,288,257 | $3,029,051 | $2,259,206 | 11 |
| | | | | |
| **Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)** | **$12,821,651** | **$8,161,955** | **$4,659,696** | **45** |
| Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511) | $7,322,627 | $6,419,025 | $903,602 | 38 |
| Book, Periodical, and Music Stores (NAICS 4512) | $5,499,024 | $1,742,930 | $3,756,094 | 7 |
| | | | | |
| **General Merchandise Stores (NAICS 452)** | **$100,638,988** | **$47,877,376** | **$52,761,612** | **18** |
| Department Stores Excluding Leased Depts. (NAICS 4521) | $35,168,648 | $22,594,734 | $12,573,914 | 6 |
| Other General Merchandise Stores (NAICS 4529) | $65,470,340 | $25,282,642 | $40,187,698 | 12 |
| | | | | |
| **Miscellaneous Store Retailers (NAICS 453)** | **$21,606,651** | **$19,593,356** | **$2,013,295** | **75** |
| Florists (NAICS 4531) | $2,404,976 | $5,790,300 | ($3,385,324) | 12 |
| Office Supplies, Stationery, and Gift Stores (NAICS 4532) | $3,625,590 | $5,974,327 | ($2,348,737) | 25 |
| Used Merchandise Stores (NAICS 4533) | $677,044 | $269,241 | $407,803 | 8 |
| Other Miscellaneous Store Retailers (NAICS 4539) | $14,899,041 | $7,559,488 | $7,339,553 | 30 |
| | | | | |
| **Food Services & Drinking Places (NAICS 722)** | **$163,711,325** | **$111,711,435** | **$51,999,890** | **225** |
| Full-Service Restaurants (NAICS 7221) | $103,079,603 | $44,073,877 | $59,005,726 | 132 |
| Limited-Service Eating Places (NAICS 7222) | $41,923,142 | $53,410,886 | ($11,487,744) | 54 |
| Special Food Services (NAICS 7223) | $9,186,676 | $10,932,342 | ($1,745,666) | 12 |

**Sales Leakage**

The demand for goods and services that is not being met locally is referred to as *sales leakage,* shown in the table above as a positive retail gap. The leakage occurs because consumers make purchases at establishments located outside the defined trade area. For example, there were approximately $15 million of retail sales in the *Clothing Store* category in the Trade Area. However, Trade Area residents spent approximately $49 million on these types of goods. Therefore, residents spent about $33 million outside of the Trade Area on *Clothing,* and this $33 million is considered leakage.

Sales leakages are normally viewed as a potential opportunity for unmet demand in a Trade Area to be recaptured by new local businesses. Sectors experiencing leakage include: *Motor Vehicle & Parts Dealers, Furniture & Home Furnishings Stores, Health & Personal Care Stores, Gasoline Stations, Clothing Stores, Sporting Goods Stores* and *General Merchandise Stores.* It is important to note that just because an industry sector is exhibiting leakage within a particular trade area does not automatically indicate that it will be a good fit for that trade area, and many other factors should be examined when determining whether a retail category should locate. The retail potential for additional stores within the Trade Area is analyzed later in this report and identifies which industries have enough retail leakage to potentially support additional retail outlets.

**Sales Surplus**

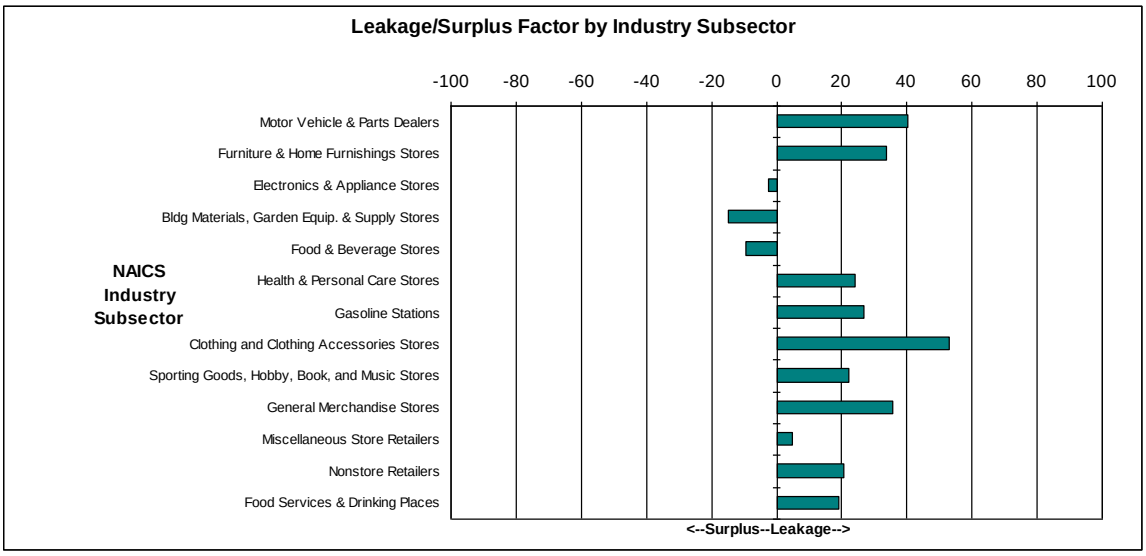
Conversely, if the supply of goods sold exceeds trade area demand, we assume that non-residents are coming into the trade area to spend money, creating a *sales surplus*. A sales surplus is shown as a negative retail gap in the table titled *Trade Area Retail Surplus and Leakage*. There are two likely reasons a sales surplus condition would exist. First, a cluster of competing businesses offering a similar good or product may be located within the trade area, creating a specialty cluster that draws in spending by households from outside the trade area. Secondly, a sales surplus may indicate a saturated retail market, where supply exceeds demand.

Industries that have a large sales surplus compared to their total sales include (a surplus factor of over -20 where -100 is total surplus):

- Office Supplies, Stationary, and Gift Stores
- Used Merchandise Stores

Sectors with leakage (positive retail gap) can be good markets to pursue in that residents are currently going outside of the Trade Area to make purchases, so a new business could capture those residents. Alternatively, an industry with a surplus could provide a niche market that the area could build on.

The chart below illustrates the leakage/surplus factor for a sampling of the industry groups. A higher (positive) leakage factor indicates higher expenditure being made outside of the Trade Area.




*Source: ESRI*

The high levels of sales leakage could be due to the high number of larger outlet type malls in the surrounding communities. Residents have many options available nearby, including large factory outlets in Niagara Falls, Walden Galleria Mall in Buffalo, and many larger national stores located along Niagara Falls Boulevard.

**Retail Use Feasibility Study**

While the charts and tables in the previous section identify a number of industry sectors which are experiencing leakage, that does not mean that brand new businesses locating in the area would inherently be successful. By performing a retail use feasibility analysis, the following section identifies which of the industries with leakage have enough customers to potentially warrant opening a brand new site. This type of analysis helps to identify target businesses which will be successful. This analysis assumes 25% of residents who are currently going elsewhere to shop will instead stay within the BOA and spend their money locally if new stores or businesses existed. This recapture rate depends largely on the current existing amenities, commuting patterns and residents' affinity towards certain stores or brands and may be higher or lower than what is assumed in this analysis. The table below identifies the industries which are experiencing sales leakage in the Trade Area.

Using ESRI data of total retail sales and the total number of businesses in each industry group, Camoin Associates was able to identify the average sales per business for each industry group in the United States. Using the Retail Gap for the industries experiencing leakage and dividing the average sales per business in that industry, Camoin Associates was able to identify retail opportunities for the Trade Area.

| |
|---|
| **Industry Group**: Organized by NAICS code. *Industry Groups* (3 digit NAICS codes) are subsets of *Industry Subsectors* (4 digit NAICS codes). |
| **National Ave Sales**: Equals average sale per store of indicated type in USA |
| **Retail Gap**: Equals sales leakage in Malone Study Area for industry group. |
| **25% Recapture Rate**: Equals 25% of the Retail Gap |
| **# of Potential Businesses**: Dividend of 25% Recapture Rate divided by National Ave Sales. |

| Retail Opportunities | | | | |
|---|---|---|---|---|
| **Industry Group** | **National Avg. Sales** | **Trade Area Retail Gap** | **25% Recapture Rate** | **Retail Potential*** |
| | | | | |
| Motor Vehicle & Parts Dealers (NAICS 441) | $2,925,386 | $123,215,306 | $30,803,827 | 10.53 |
| Automobile Dealers (NAICS 4411) | $5,312,249 | $108,417,093 | $27,104,273 | 5.1 |
| Other Motor Vehicle Dealers (NAICS 4412) | $1,227,169 | $9,845,180 | $2,461,295 | 2.01 |
| Auto Parts, Accessories, and Tire Stores (NAICS 4413) | $525,070 | $4,953,033 | $1,238,258 | 2.36 |
| | | | | |
| Furniture & Home Furnishings Stores (NAICS 442) | $833,640 | $15,596,424 | $3,899,106 | 4.68 |
| Furniture Stores (NAICS 4421) | $1,143,612 | $8,506,481 | $2,126,620 | 1.86 |
| Home Furnishings Stores (NAICS 4422) | $595,504 | $7,089,943 | $1,772,486 | 2.98 |
| | | | | |
| Lawn and Garden Equipment and Supplies Stores (NAICS 4442) | $280,412 | $1,807,563 | $451,891 | 1.61 |
| | | | | |
| Specialty Food Stores (NAICS 4452) | $328,354 | $1,028,646 | $257,162 | 0.78 |
| Beer, Wine, and Liquor Stores (NAICS 4453) | $672,987 | $7,271,180 | $1,817,795 | 2.7 |
| | | | | |
| Health & Personal Care Stores (NAICS 446/NAICS 4461) | $877,006 | $16,436,314 | $4,109,079 | 4.69 |
| | | | | |
| Gasoline Stations (NAICS 447/NAICS 4471) | $4,032,667 | $58,030,092 | $14,507,523 | 3.6 |
| | | | | |
| Clothing and Clothing Accessories Stores (NAICS 448) | $542,667 | $33,983,017 | $8,495,754 | 15.66 |
| Clothing Stores (NAICS 4481) | $632,946 | $27,821,501 | $6,955,375 | 10.99 |
| Shoe Stores (NAICS 4482) | $414,769 | $3,902,310 | $975,578 | 2.35 |
| Jewelry, Luggage, and Leather Goods Stores (NAICS 4483) | $333,652 | $2,259,206 | $564,802 | 1.69 |
| | | | | |
| Sporting Goods, Hobby, Book, and Music Stores (NAICS 451) | $321,303 | $4,659,696 | $1,164,924 | 3.63 |
| Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511) | $219,322 | $903,602 | $225,901 | 1.03 |
| Book, Periodical, and Music Stores (NAICS 4512) | $681,063 | $3,756,094 | $939,024 | 1.38 |
| | | | | |
| General Merchandise Stores (NAICS 452) | $5,038,999 | $52,761,612 | $13,190,403 | 2.62 |
| Department Stores Excluding Leased Depts. (NAICS 4521) | $6,029,915 | $12,573,914 | $3,143,479 | 0.52 |
| Other General Merchandise Stores (NAICS 4529) | $4,388,121 | $40,187,698 | $10,046,925 | 2.29 |
| | | | | |
| Miscellaneous Store Retailers (NAICS 453) | $190,583 | $2,013,295 | $503,324 | 2.64 |
| Used Merchandise Stores (NAICS 4533) | $81,304 | $407,803 | $101,951 | 1.25 |
| Other Miscellaneous Store Retailers (NAICS 4539) | $238,067 | $7,339,553 | $1,834,888 | 7.71 |
| | | | | |
| Food Services & Drinking Places (NAICS 722) | $665,427 | $51,999,890 | $12,999,973 | 19.54 |
| Full-Service Restaurants (NAICS 7221) | $522,129 | $59,005,726 | $14,751,432 | 28.25 |
| Drinking Places - Alcoholic Beverages (NAICS 7224) | $460,990 | $6,227,574 | $1,556,894 | 3.38 |

* Number of establishments

Most of the industries are experiencing very large retail gaps, making it possible for additional businesses to open within the Trade Area. The column titled *Retail Potential* shows the number of businesses that could open when taking into account the total sales leakage and the average sales per store in that particular industry. Capitalizing on the existing sales leakage would allow the local municipalities to recapture some of the currently leaking retail sales, creating additional sales tax revenue, jobs and investment in the community. Further investigation into the current needs of residents will be imperative to determine what, if any, of the retail sectors should be attracted to locate within the North Tonawanda BOA.

**Consumer Spending Patterns**

To evaluate the spending patterns of residents within the Trade Area, Camoin Associates obtained the current estimates of consumer expenditures for goods and services. This particular analysis looks at the spending done by residents of the Trade Area but does not indicated where these expenditures were made, whether they were made in or out of the Trade Area. The analysis presents the purchasing power of the households within the Trade Area.

The table below shows the average annual spending per household on a particular good or service, the Trade Area total spending on that good, and the spending potential index (SPI). The SPI represents household expenditures on a product or service relative to a national average of 100. SPI's with values greater than 100 indicate that households spend relatively more on average on that particular good than the average U.S. household.

The total expenditures for households in the Trade Area are significantly less than the national average, with an SPI of 88; households are spending less than the national average on almost every consumer item with the exception of a handful of items. Categories where residents within the Trade Area are spending above the national average are mostly on items considered necessity, as opposed to a luxury. For example, residents are spending higher than average on natural gas, fuel oil, and care for the elderly and handicapped. Residents in the Trade Area are spending close to the national average on a few luxury items, such as vacation homes, food away from home, entertainment and travel.

| Trade Area Spending Potential Index | | | |
|---|---|---|---|
| | Average Spent | Total | SPI |
| Care for Elderly and Handicapped | $60 | $2,634,412 | 118 |
| Fuel Oil | $119 | $5,245,522 | 107 |
| Natural Gas | $710 | $31,317,916 | 105 |
| Property Taxes | $90 | $3,991,694 | 98 |
| Health Care | $3,553 | $156,791,183 | 94 |
| Education | $1,167 | $51,494,500 | 93 |
| Owned Vacation Homes | $334 | $14,744,377 | 91 |
| Food At Home | $4,101 | $180,950,795 | 90 |
| Food Away From Home | $2,981 | $131,550,598 | 90 |
| Personal Care Products & Services | $641 | $28,281,473 | 90 |
| Electricity | $1,492 | $65,840,637 | 90 |
| Entertainment and Recreation | $2,892 | $127,637,398 | 89 |
| Travel | $1,634 | $72,122,520 | 88 |
| Housing | $17,815 | $786,149,602 | 88 |
| Child Care | $387 | $17,064,325 | 88 |
| Transportation | $9,029 | $398,440,724 | 87 |
| Rent | $2,659 | $117,348,501 | 82 |
| Household Furnishings and Equipment | $1,669 | $73,662,477 | 77 |
| Apparel and Services | $1,558 | $68,749,739 | 62 |
| Total Expenditures | $59,747 | $2,636,526,301 | 88 |

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.

*Source: ESRI Forecasts for 2009 and 2014, Camoin Associates*

## Retail Market Space Availability

The following information comes from a CB Richard Ellis report on the retail market in the Buffalo area[5]. The North Tonawanda BOA is included in this report and is identified as part of the "Boulevard Mall" submarket.

Overall, the Western NY Retail Real Estate Market changed by less than 1% per year over the last five years. The Retail Real Estate Market has mirrored national trends including low levels of new development. The Boulevard Mall submarket has over 5 million square feet of total retail space and almost 500,000 square feet of available inventory. There has been an increase in vacancy rates in the Boulevard Mall submarket. The table below shows that although there was an increase in vacancy in the Boulevard Mall, it was very slight (0.88%).

| Retail Market Statistics | | | | | | |
|---|---|---|---|---|---|---|
| Submarket | Total Inventory SF | Change in Supply SF | Available Inventory SF | Vacancy Rate | Change in Vacancy % | Net Absorption SF |
| City of Buffalo | 2,302,646 | 18,300 | 545,887 | 23.71% | -5.69% | 164,572 |
| Boulevard Mall | 5,261,069 | 0 | 498,078 | 9.47% | 0.88% | -46,332 |
| Eastern Hills Mall | 4,060,091 | 0 | 213,793 | 5.27% | 0.06% | -2,190 |
| Galleria Mall | 5,171,581 | 50,000 | 673,111 | 13.02% | 1.40% | -27,791 |
| McKinley Mall | 4,948,677 | 0 | 523,097 | 10.57% | -1.59% | 78,513 |
| Niagara | 4,128,259 | 0 | 812,869 | 19.69% | 0.29% | -11,948 |

*Source: CB Richard Ellis MarketView Buffalo Retail Annual 2008/2009 Report*

## Market Segmentation Analysis

In addition to basic demographic and retail data analysis, another useful tool in determining the characteristics of a particular trade area is market segmentation, which is defined as the classification of consumers according to demographic, socioeconomic, housing, and lifestyle characteristics. It is based on the concept that people with similar demographic characteristics, purchasing habits, and media preferences naturally gravitate toward each other and into the communities in which they live. Using socioeconomic indicators such as income, employment, age, housing type, and other factors, ESRI Business Analyst separates a population within a defined geography into one or more predefined classifications, or segments. ESRI has 65 predefined segments, and will identify the predominate segments within a community. This is useful to gain a general feel for the spending habits, tastes, and cultural preferences of a community.

It is important to understand that the classifications and labels for defined market segments are generalizations. The descriptions of each segment are based on comparisons with the U.S. as a whole, and reflect the propensity of households within that segment to exhibit certain demographic, lifestyle, and consumer characteristics relative to the overall population. Nevertheless, market segmentation analysis can provide a useful perspective in understanding existing and potential customers residing within a defined area. A summary and brief description of the major "Community Tapestry" segments within the study area is included below.

[5] CB Richard Ellis. Market View Buffalo Retail. Annual 2008/2009

The table below shows the five largest Tapestry segments as identified by ESRI in the Trade Area followed by a brief description of each segment.

| Tapestry Segmentation | | |
|---|---|---|
| | % of Trade Area Population | % of US Population |
| Rustbelt Retirees | 26.80% | 2.10% |
| Cozy and Comfortable | 15.00% | 2.80% |
| Rustbelt Traditions | 13.40% | 2.80% |
| Great Expectations | 9.00% | 1.70% |
| Green Acres | 6.90% | 3.20% |

*Source: ESRI*

**Rustbelt Retirees (26.80%):** These neighborhoods can be found in older, industrial cities. Households are mainly occupied by married couples with no children and singles that live alone. The median age is 43.8 years. Although many residents are still working, labor force participation is below average. More than 40 percent of the households receive Social Security benefits. Most residents live in owned, single-family homes, with a median value of $118,500. Unlike many retirees, these residents are not inclined to move. They are proud of their homes and gardens and participate in community activities. Some are members of veterans' clubs. Leisure activities include playing bingo, gambling in Atlantic City, going to the horse races, working crossword puzzles, and playing golf.

**Cozy and Comfortable (15.00%**): Residents of this market segment are settled, married, and still working. Many couples are still living in the pre-1970s single-family homes in which they raised their children. Households are located primarily in suburban areas of the Midwest, Northeast, and South. The median age is 41 years, and the median home value is $164,000. Home improvement and remodeling are important to Cozy and Comfortable residents. Although some work is contracted out, homeowners take an active part in many projects, especially painting and lawn care. Television is important to this group; many households have four or more sets.

**Rustbelt Traditions (13.40%)**: This segment describes many communities across the United States, and has the sixth largest population of all the Community Tapestry segments. It is characterized by primarily white neighborhoods with a mix of married-couple families, single-parent families and singles living alone. Most households work in a white collar job with a median income around $50,000. Most people own their homes and have been living in the same area for a long period of time. Many watch their diet and exercise for health. Residents are careful with their money and enjoy watching television for entertainment, especially sports programs. For leisure they enjoy bowling, hunting, country music and attending ice hockey games.

**Great Expectations (9.00%):** This market segment is dominated by young singles and young married-couple families with a median age of 33.2 years. Median household income is approximately $37,000 and net worth for this segment is low compared to U.S. values. Many of these markets are found in the Midwest and South and residents typically are just starting their career and not yet focused on retirement investing or able to travel

extensively. Primary employers of this market include manufacturing, retail and the service industry. Residents in this market segment enjoy a young and active lifestyle including going out to dinner, night clubs and movies.

**Green Acres (6.90%):** This market is primarily comprised of married couples, with or without children. This market segment is not ethnically diverse, with 93% of the residents identifying themselves as White. More than half of the Green Acre residents over the age of 25 hold a degree or have attended college and their median household income is approximately $64,000. The primary sources of occupation include manufacturing, construction, health care and retail trade industry sectors. Many of these neighborhoods are found in the Midwest and South, but they are located throughout the country as well. Residents in this market segment prefer to do home repairs themselves and other do-it-yourself activities.

A chart summarizing the "Community Tapestry" segments is shown below. The charts show from top to bottom.

- Tapestry Segment and classification number (this number is an ESRI reference number and is only for identification purposes),
- Life Mode Group,
- Urbanization Group,
- Family,
- Median Age,
- Occupation type,
- Schooling,
- Household Type,
- Race,
- Activities commonly associates with each segment.

| 29 Rustbelt Retirees | 18 Cozy and Comfortable | 32 Rustbelt Traditions | 48 Great Expectations | 17 Green Acres |
|---|---|---|---|---|
|  |  |  |  |  |
| L5 *Senior Styles* | L2 *Upscale Avenues* | L10 *Traditional Living* | L7 *High Hopes* | L2 *Upscale Avenues* |
| U8 *Suburban Periphery II* | U8 *Suburban Periphery II* | U5 *Urban Outskirts I* | U5 *Urban Outskirts I* | U10 *Rural I* |
| MC w/No Kids; Singles | Married-Couple Families | Mixed | Mixed | Married-Couple Families |
| 45.2 | 42.0 | 36.5 | 33.2 | 40.7 |
| Middle | Upper Middle | Middle | Lower Middle | Upper Middle |
| Prof/Mgmt/Skilled/Srvc | Prof/Mgmt | Skilled/Prof/Mgmt/Srvc | Prof/Mgmt/Skilled/Srvc | Prof/Mgmt/Skilled |
| HS Grad; Some College | Some College | HS Grad; Some College | HS Grad; Some College | Some College |
| Single Family | Single Family | Single Family | Single Family; Multiunits | Single Family |
| White | White | White | White | White |
| Play bingo | Dine out often at family restaurants | Buy children's and baby products | Do painting, drawing | Do gardening, woodworking |
| Own annuities | Have personal line of credit | Use credit union | Have 2nd mortgage (equity loan) | Have home equity credit line |
| Belong to fraternal orders, unions, etc. | Shop at Kohl's | Do painting, drawing | Listen to classical music on radio | Attend country music shows |
| Watch news shows on TV | Listen to sporting events on radio | Watch cable TV | Read baby magazines | Watch auto racing on TV |
| Own/Lease Pontiac | Own/Lease minivan | Own/Lease domestic vehicle | Own motorcycle | Drive 20,000+ miles annually |

# OFFICE AND INDUSTRIAL MARKET ANALYSIS

## Introduction

The office and industrial market analysis compares existing conditions and available space to projected trends in employment growth in the Trade Area to better understand the market and identify any possible opportunities for development. The occupation information analyzed below was purchased from Economic Modeling Systems, Inc. The geographic area for which these data were analyzed is the North Tonawanda BOA Trade Area (Zip Codes 14120, 14228, and 14150).

Camoin Associates also obtained commercial real estate market reports produced by CB Richard Ellis to better understand the current market. These reports are focused primarily on the Buffalo market, but have information that is suited to the North Tonawanda BOA project as well.

### Regional Economic Growth

An analysis of the growth/decline in the various industrial sectors can provide information about where there may be a market for additional industrial or office space. It also can give a good indication of whether jobs are coming to the area due to positive economic development momentum, or if the area is experiencing a decline in job opportunities.

The table on the following page shows that overall there will be an increase in the number of jobs available in the next five years. It is projected that there will be 1,105 new jobs created, or a 2% increase in job opportunities for residents of the Trade Area. The largest employer in the Trade Area is the *Administrative and Waste Services* sector, followed by *Manufacturing* and *Retail Trade*.

The industry sector experiencing the most growth in the next five years is the *Administrative and Waste Services* sector. This sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. The administrative and management activities performed by establishments in this sector are typically on a contract or fee basis. Overall, the sectors which are experiencing the most growth can be defined as typical office utilizing industries. For example, there will be a strong increase in the *Finance and Insurance* sector, the *Management of Companies and Enterprises* sector, and the *Health Care and Social Assistance* sector.

A typical industrial space utilizing industry that is expected to gain jobs in the next five years includes the *Transportation and Warehousing* industry. Typical industrial space utilizing industry that is expected to experience a steep decline in the coming years is the *Manufacturing* sector with a projected 14% (1,060) of the jobs lost over the next five years. Even with this steep decline, *Manufacturing* will remain the second largest employer in the Trade Area. There will also be a loss of jobs in the following sectors:

- Professional and technical services
- Wholesale Trade
- Other services, except public administration
- Information
- Utilities

| BOA Trade Area Industry Growth Breakdown | | | | | | |
|---|---|---|---|---|---|---|
| NAICS Code | Description | 2009 Jobs | 2014 Jobs | Change | % Change | Current EPW |
| 56 | Administrative and waste services | 7,883 | 8,779 | 896 | 11% | $31,513 |
| 31-33 | Manufacturing | 7,784 | 6,724 | (1,060) | (14%) | $60,546 |
| 44-45 | Retail trade | 6,645 | 6,651 | 6 | 0% | $20,410 |
| 54 | Professional and technical services | 4,954 | 4,895 | (59) | (1%) | $48,819 |
| 90 | Government | 4,442 | 4,487 | 45 | 1% | $45,094 |
| 62 | Health care and social assistance | 4,362 | 4,643 | 281 | 6% | $31,893 |
| 72 | Accommodation and food services | 4,008 | 4,180 | 172 | 4% | $13,270 |
| 52 | Finance and insurance | 3,811 | 4,101 | 290 | 8% | $53,050 |
| 23 | Construction | 3,417 | 3,641 | 224 | 7% | $40,052 |
| 48-49 | Transportation and warehousing | 2,998 | 3,075 | 77 | 3% | $40,001 |
| 42 | Wholesale trade | 2,820 | 2,759 | (61) | (2%) | $50,143 |
| 55 | Management of companies and enterprises | 2,557 | 2,761 | 204 | 8% | $62,354 |
| 81 | Other services, except public administration | 2,402 | 2,400 | (2) | (0%) | $19,495 |
| 53 | Real estate and rental and leasing | 1,426 | 1,580 | 154 | 11% | $21,319 |
| 51 | Information | 1,116 | 995 | (121) | (11%) | $48,648 |
| 71 | Arts, entertainment, and recreation | 774 | 825 | 51 | 7% | $11,065 |
| 61 | Educational services | 318 | 340 | 22 | 7% | $22,468 |
| 22 | Utilities | 154 | 138 | (16) | (10%) | $86,048 |
| 11 | Agriculture, forestry, fishing and hunting | 27 | 27 | 0 | 0% | $19,243 |
| 21 | Mining | 17 | 19 | 2 | 12% | $54,396 |
| | | 61,915 | 63,020 | 1,105 | 2% | $38,950 |

Source: EMSI Complete Employment - 2nd Quarter 2009 v2

Also important to note is the projected decline in many of the highest paying industries. For example, there will be a decline in *Utilities* industry jobs which pays $86,000 per worker and a decline in the *Manufacturing* industry which pays $60,000 per worker. Some of the fastest growing industries are paying only $21,000 or $31,000. This type of shift in the workforce will impact the spending capability and demands of the residents. It will also shift the population make-up as residents who were making more money may need to move out of the area in order to get a new job.

**Regional Growth in Office Utilizing Industries**

Employment projections shown in the table below show that overall there will be growth in a majority of the industries which typically utilize office space. Some of the industries will be growing quickly, including *real estate and rental and leasing* and *administrative and waste services.* Overall these sectors will grow 4% over the next five years, and add almost 2,000 jobs to the Trade Area.

| Office Space Utilizing Industry Growth | | | | | | |
|---|---|---|---|---|---|---|
| NAICS Code | Description | 2009 Jobs | 2014 Jobs | Change | % Change | Current EPW |
| 56 | Administrative and waste services | 7,883 | 8,779 | 896 | 11% | $31,513 |
| 54 | Professional and technical services | 4,954 | 4,895 | (59) | (1%) | $48,819 |
| 90 | Government | 4,442 | 4,487 | 45 | 1% | $45,094 |
| 62 | Health care and social assistance | 4,362 | 4,643 | 281 | 6% | $31,893 |
| 72 | Accommodation and food services | 4,008 | 4,180 | 172 | 4% | $13,270 |
| 52 | Finance and insurance | 3,811 | 4,101 | 290 | 8% | $53,050 |
| 55 | Management of companies and enterprises | 2,557 | 2,761 | 204 | 8% | $62,354 |
| 81 | Other services, except public administration | 2,402 | 2,400 | (2) | (0%) | $19,495 |
| 53 | Real estate and rental and leasing | 1,426 | 1,580 | 154 | 11% | $21,319 |
| 51 | Information | 1,116 | 995 | (121) | (11%) | $48,648 |
| | | 36,961 | 38,821 | 1,860 | 4% | $38,950 |

Source: EMSI Complete Employment - 2nd Quarter 2009 v2

For comparative purposes, the table below shows the projected Trade Area growth rate for industries that typically utilize office space alongside the projected growth rates of the same industries in Western NY[6] and New York State. The Trade Area growth is slower than NYS, but similar to Western NY growth projections. It is important to note that the Trade Area earnings per worker is significantly lower than Western NY and New York State (note that the NYS data includes NYC which can skew the data dramatically due to high paying professionals living in NYC).

| Growth in Office Utilizing Industries- Comparison Chart | | | | | |
|---|---|---|---|---|---|
| | 2009 | 2014 | Change | % Change | EPW |
| Trade Area | 36,961 | 38,821 | 1,860 | 4% | $38,950 |
| Western NY | 849,945 | 885,957 | 36,013 | 4% | $43,035 |
| New York State | 7,079,005 | 7,569,803 | 490,797 | 7% | $71,648 |

Source: EMSI Complete Employment - 2nd Quarter 2009 v2

### *LOCAL SPACE AVAILABILITY- OFFICE AND INDUSTRIAL*

The following information comes from the CB Richard Ellis report which provides information on the regional vacancy, absorption and rent rates for the Buffalo area[7]. These reports include information regarding the region in which the North Tonawanda BOA is located and the Trade Area.

[6] Western New York is defined as the following counties: Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Livingston, Monroe, Niagara, Ontario, Orleans, Wayne and Wyoming.

[7] CB Richard Ellis. Market View Buffalo Industrial and Buffalo Office. Annual 2008/2009.

Office Market

In 2007, there was development of over 1,100,000 square feet of new office space in Western New York and an additional 804,248 square feet in 2008. This space is being absorbed at a steady level and there continues to be strong demand. When the 2008/2009 CB Richard Ellis report was written, there was an additional 991,451 square feet of new office space under construction or planned to be available during 2009/2010. The report makes a point to note that there was over 1.4 million square feet of office space planned to be built in 2009, but only 800,000 square feet was completed. This is most likely related to the economic climate of recent years.

The CB Richard Ellis reports on the Suburban North region of the Buffalo market which includes the North Tonawanda BOA. The Suburban North market showed the strongest increase in office space availability, with an increase of 473,048 total square feet added in the past year. The City of Buffalo central business district saw an increase of 128,000 square feet and an upgrade in some Class B space. The Suburban South market saw an increase of 30,000 and the upgrade of some Class C space and the Suburban East market saw an increase of only 120,000 square feet. The table below shows the current office space market for the Suburban North region.

| Office Market Statistics - Suburban North Region | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total Inventory SF | Change in Supply SF | Available Inventory SF | Vacancy Rate% | Change in Vacancy % | Net Absorption SF | Quoted Lease Rate $ |
| Class A | 2,105,307 | 154,672 | 262,451 | 12.47% | 3.10% | 74,938 | $19-$23 |
| Class B | 2,850,139 | 214,376 | 178,325 | 6.26% | -3.05% | 281,235 | $15-$18 |
| Class C | 424,498 | 0 | N/A | N/A | N/A | N/A | N/A |
| Flex Office | 2,704,233 | 104,000 | 309,659 | 11.45% | 3.04% | 12,941 | $10-$14 |

*Source: CB Richard Ellis MarketView Buffalo Office Annual 2008/2009 Report*

Another important statistic is the number of square feet available in the various submarkets. The Suburban North region has over 700,000 square feet of available inventory, the third largest supply in the Buffalo region behind the City Central Business District which has over 770,000 square feet available and the Suburban East market which has over 780,000 square feet available. The highest vacancy rate is occurring in the Suburban South market (21% for Class A, 11% for Class B and 18% for Flex Office space).

The quoted lease rate for the Suburban North market is the same as the quoted lease rates for the City Central Business district, which is slightly higher than the other submarkets in the Buffalo market.

Industrial Market

The Western New York market has been bucking the trend when it comes to industrial vacancy. During the past year industrial vacancy decreased from 9.7% to 9.5% which is equal to a reduction of almost 60,000 square feet of industrial space being utilized or removed from the market. While this is a positive trend, it is important to note that this vacancy rate is higher than other regional cities including Toronto and Cleveland (5.8% and 8.2% respectively).

The Suburban North market experienced an increase of 151,000 square feet of flex and manufacturing space in the last year. There is a total of almost 650,000 square feet of available industrial space, but it is important to note that there was a decrease in vacancy rate in the manufacturing and warehousing space over the past year. The Suburban North region has had three consecutive years of high absorption rates.

| Industrial Market Statistics - Suburban North Region | | | | | | |
|---|---|---|---|---|---|---|
| | Total Inventory SF | Change in Supply SF | Available Inventory SF | Vacancy Rate% | Change in Vacancy % | Net Absorption SF |
| Flex | 2,921,149 | 104,000 | 345,418 | 12.10% | 4.10% | -25,238 |
| Manufacturing | 10,382,915 | 51,000 | 125,690 | 1.20% | -1.50% | 202,500 |
| Warehousing | 5,298,411 | 0 | 177,487 | 3.3 | -3.00% | 159,323 |

*Source: CB Richard Ellis MarketView Buffalo Industrial Annual 2008/2009 Report*

An important event in the past year with respect to available industrial space was the addition of 360,000 square feet of manufacturing space which was created as part of the Niagara Frontier Transportation Authority's Terminal "A" building expansion project. This additional space may impact the attractiveness of industrial space in the North Tonawanda BOA and within the Trade Area.

# TOURISM MARKET ANALYSIS

## Introduction

As part of the its BOA effort, the City of North Tonawanda is interested in understanding the current tourism market and indentifying potential areas for growth. The following tourism market analysis will review existing tourism related businesses, the potential for growth in the tourism industry in the City and the projected growth in tourism related jobs. The analysis will include a combination of data pulled for the Trade Area (defined as Zip Codes: 14120, 14228, and 14150) and Niagara County. This information will help to identify if there is potential for tourism related development (hotel, restaurants, entertainment, etc.) to meet demand, and/or what efforts are necessary to generate additional demand.

The industry data below were purchased from EMSI. Information was also pulled from other research done on this topic, including the 2004 report *Tourism's Role in the Upstate New York Economy* written by Richard Dietz, the *Niagara Communities Comprehensive Plan 2030, Downtown Lockport Strategic Development & Marketing Plan* and interviews with local economic development professionals and residents.

### Existing Tourism Resources

The City of North Tonawanda has been working steadily to increase visitation to the Gateway Harbor district (Webster Street/historic downtown) and the City in general, including the BOA, in order to boost the local economy and drive more spending in the area. During the summer months there is reported to be a lot activity along the waterfront including concerts, boats docked along with canal and an increasing number of regional tourists looking to spend time in the Gateway Harbor district and enjoy their boat. For additional economic activity, and in order to increase spending at local businesses, the City would like to provide visitors with overnight options and resources for them to stay longer in the area. The effort to increase the number of days and nights spent in the City has been difficult due to the nonexistence of hotel rooms in the City. The lack of hotel rooms and tourism related services has been a disadvantage for the City of North Tonawanda and is making it virtually impossible to capture overnight spending from visitors to the Buffalo-Niagara region, one of the most heavily traveled tourist destinations in United States.

A quick internet search, similar to one a potential visitor might conduct, of hotel rooms in the City of North Tonawanda show that there are no hotels within the downtown but that there is a wide variety of options in the surrounding towns, offering various amenities and price points. Even outside of direct proximity to the Falls, surrounding towns have hotel options for visitors looking to spend time in the Buffalo-Niagara region. For example, Niagara Falls Boulevard is cluttered with hotels in the Town of Amherst (southeast of the Trade Area) and Niagara Falls (north of the Trade Area). The hotels in Amherst are close to the University at Buffalo campus, meeting the demand of parents and visitors to the campus and attracting people who are visiting the Falls but looking for a different experience than staying right in the City of Niagara Falls.

The City of North Tonawanda is doing what it can to develop opportunities and resources for visitors, including regular festivals, concerts and events throughout the summer as well as working to revitalize the Gateway Harbor district to appeal to and accommodate tourists. The revitalization of the Gateway Harbor district has been successful but full realization of the economic activity has been impossible without overnight stay options.

Although the City has been successful in generating tourism activity and regional entertainment during the summer months, it has been difficult to make it a year-round tourist destination. The seasonal nature of tourism in upstate New York is something that many communities struggle with, and it is oftentimes necessary to find alternative attractions for the winter months. The City does have attractions other than the Canal and waterfront that they can market, including the Riviera Theater which offers a wide variety of performances that appeal to families and young adults, the Herschell Carrousel Factory Museum, Carnegie Art Center, and the Ghostlight Theater. These alternative attractions do not themselves generate enough activity to warrant a new large hotel, but in combination with regional attractions they could bring more people into the area throughout the year.

**Trends in Tourism Related Industries**

The BOA Trade Area, which includes zip codes in Erie County, has shown a slight increase in tourism related industry jobs over the past 5 years. The table below shows that there has been a 6% increase in the *Arts, entertainment, and recreation* industry since 2005, but it only makes up 1.27% of the total jobs for the Trade Area. There has also been a 3% increase in the *Accommodation and food services* industry since 2005, and it makes up 6.53% of the total jobs for the Trade Area.

Growth in Tourism Related Industries

| NAICS Code | Description | 2005 Jobs | 2010 Jobs | % Change | Current EPW | % of all jobs |
|---|---|---|---|---|---|---|
| 71 | Arts, entertainment, and recreation | 746 | 788 | 6% | $11,065 | 1.27% |
| 711 | Performing arts and spectator sports | 334 | 314 | (6%) | $7,985 | 0.51% |
| 7111 | Performing arts companies | 65 | 76 | 17% | $14,045 | |
| 712 | Museums, historical sites, zoos, and parks | 19 | 32 | 68% | $9,346 | 0.05% |
| 713 | Amusements, gambling, and recreation | 393 | 442 | 12% | $13,350 | 0.71% |
| 7132 | Gambling industries | 19 | 17 | (11%) | $18,876 | |
| 7139 | Other amusement and recreation industries | 374 | 425 | 14% | $13,158 | |
| 71391 | Golf courses and country clubs | 46 | 54 | 17% | $17,140 | |
| 71393 | Marinas | 36 | 36 | 0% | $19,061 | |
| 71394 | Fitness and recreational sports centers | 169 | 184 | 9% | $12,940 | |
| 71395 | Bowling centers | 59 | 44 | (25%) | $10,866 | |
| 71399 | All other amusement and recreation industries | 65 | 107 | 65% | $10,489 | |
| 72 | Accommodation and food services | 3,939 | 4,060 | 3% | $13,270 | 6.53% |
| 721 | Accommodation | 290 | 286 | (1%) | $21,211 | 0.46% |
| 7211 | Traveler accommodation | 272 | 269 | (1%) | $21,245 | |
| 72111 | Hotels and motels, except casino hotels | 254 | 254 | 0% | $21,186 | |
| 72112 | Casino hotels | 18 | 16 | (11%) | $22,269 | |
| 7212 | RV parks and recreational camps | 13 | 14 | 8% | $18,605 | |
| 722 | Food services and drinking places | 3,650 | 3,773 | 3% | $12,657 | 6.07% |
| 7221 | Full-service restaurants | 1,471 | 1,415 | (4%) | $14,030 | |
| 7222 | Limited-service eating places | 1,890 | 2,103 | 11% | $11,507 | |
| 7223 | Special food services | 188 | 176 | (6%) | $15,743 | |
| 7224 | Drinking places, alcoholic beverages | 101 | 79 | (22%) | $10,720 | |

Source: ESRI & Camoin Associates

Within the *Arts, recreation and recreation* industry, most of the jobs are in the *Fitness and recreation sport center* industry, which is not a typical tourism related industry.

Looking closer at the *Accommodation and food services* industry sector, it is clear that most of those jobs are made up from the *Food services and drinking places* sector, which makes up 6.07% of all jobs within the Trade Area. The *Accommodation* industry sector makes up just a very small percentage of the Trade Area's total employment.

Within the *Food services and drinking places* sector, it is the limited-service eating places that have the highest percentage of employment within that sector and that number has been growing. Limited- service eating places are defined as: establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery. These establishments are usually lower priced than full-service and attract a different type of client. The limited-service establishments will appeal to visitors coming by boat who may be looking for something quick to eat within the area and who may not want to spend much time indoors.

**Regional Tourism Activity**

The tourism industry has slowly become a more prominent source of employment for people throughout the United States, due to the increase in tourism activity in recent history. The increases in leisure time, wages and access to affordable transportation have made the tourism industry expand to employ approximately 4% of the private sector workforce. While the tourism industry is expanding, it is important to compare it to other large national industry sectors, such as health care, which accounts for approximately 13% of employment.

For upstate New York, tourism has been identified as a possible supplement to economies that are facing a loss of employment in the manufacturing sector. The transition of employment from a manufacturing base to a tourism base can be difficult due to the seasonal nature of tourism businesses and the typically low wage jobs associated with the tourism industry. A balance of traditional economic development and the development of the tourism economy will provide the City with the best chance for a diversified economy.

The growth of employment within the New York State tourism industry has been slower than the growth of the same industry for the nation. However, the tourism industry in Niagara County has been steadily increasing at a rate faster than that of the increase in total employment. This industry base has become more important over the past decade for the County with an increase in tourism-based businesses and a decline in the manufacturing industry. Niagara Falls is one of the most well known tourist destinations in the nation, and people come from all over to visit the Falls and experience the local culture and tourist resources that exist on both the United States and Canadian sides of the Falls. There has been a recent push to develop more attractions on the US side to compete with the shopping, casinos and museums available on the Canadian side which has been acquiring more and more of the market share over the years. Niagara County has also been actively developing tourist attractions, such as the Niagara County Wine Trail, which runs by the City of North Tonawanda, the redevelopment and branding of the Erie Canal Heritage Corridor, and Old Fort Niagara.

Finally, the City of North Tonawanda is located in an advantageous spot that is central to the City of Buffalo, the SUNY Buffalo campus, Niagara Falls, and the Erie Canal. There are three city docks located in the City of North Tonawanda making it a natural docking location for people traveling the Great Lakes, the Erie Canal or general boating on the Niagara River.

The Niagara County Comprehensive Economic Development Strategy reports that approximately 12 million people visit Niagara Falls each year (studies suggest that 6 million visit the United States side). If the City, which is only 10 miles from the Falls, is able to capture 0.5% of the US visitors they could have an additional 30,000 people coming to the City each year.

**Economic Development through Tourism**

The *Niagara Communities Comprehensive Plan 2030* discusses the County's desire to increase tourism throughout the county, not just directly around the Falls. This push to connect resources will be vital to assisting the City and BOA in capturing some of the tourists. One of the goals identified in the plan was to "improve tourism and tourism-based business opportunities throughout the County". In order to accomplish this, the plan identified a recommendation to "support efforts to create physical linkages and link business information between Niagara County's communities that will help extend the stay of tourists, and thus spread economic wealth throughout the County". There is a concerted effort to increase tourism in Niagara County and although the City of North Tonawanda has experienced growth in food service related industries, a lack of hotel space is impairing its ability to capitalize on regional tourism expansion.

**Economic Impact of Tourism**

In order to demonstrate the impact of a hotel project on the Trade Area, Camoin Associates has prepared an economic impact analysis on a hypothetical 40 room hotel. The analysis assumes that the 40 room hotel is charging $115.00 a night and has a 60% average room occupancy rate per year. The following table calculates the annual sales of the hypothetical hotel.

| Hypothetical Hotel Development | |
|---|---|
| Number of Hotel Rooms | 40 |
| Occupancy | 60% |
| Occupied hotel rooms | 24 |
| Cost per night | $115 |
| Annual Sales | $1,007,400 |

The economic impact of a particular project is a sum of the direct and indirect impacts. The direct impacts are those directly related to the project or site in question (additional sales at the hotel). The indirect impacts are those which occur as the dollars from direct impacts cycle through the economy. For example, the spending by the hotel company at local businesses generates new sales and need for employees. The new employees receive wages and in turn spend a portion of those dollars in the local economy for daily needs, housing and other expenses and a proportion of those dollars are again re-spent in the local economy. As those dollars continue to circulate,

additional jobs and business activity are created. This effect is captured in the indirect impacts and is known as the multiplier effect.

| Economic Impact of Hypothetical Hotel Development | | | |
|---|---|---|---|
| | Direct | Indirect | Total |
| Sales | $1,007,400 | $382,812 | $1,390,212 |
| Jobs | 16 | 5 | 21 |
| Wages | $330,345 | $148,655 | $479,000 |

The economic impact of a 40 room hotel development would mean an additional $1,390,212 sales, 21 new jobs and an additional $479,000 in new wages for the Trade Area. In addition to the impact of the hotel itself, having visitors in the area overnight will increase spending at the local gas stations, retail stores, grocery and convenience stores, and local attractions. As this money is spent, it too will circulate throughout the economy generating additional jobs and business activity.

# Redevelopment Recommendations and Market Outlook

## Introduction

As part of the market analysis process, Camoin Associates conducted phone interviews with local economic development officials, real estate agents and developers and others who have insight into the local economy and market trends. These interviews are typically the most enlightening part of the analysis, since they provide more information than can be gathered from data analysis or statistical interpretation. The interview participants were identified by the City has being knowledgeable and Camoin Associates contacted them in February of 2010. In addition to the interviews about local matters, information from the various focus groups held by Bergmann Associates was also analyzed for similar themes and information which informed the market analysis recommendations and redevelopment scenarios. The following people were interviewed:

- Tom Barrett – Kissling Interests, LLC
- Chuck Bell – Lumber City Development Corporation
- John Duere – Positive Marketing
- Robert Kissel – Uniland Development
- Greg Sehr – President of Upstate Consultants, LLC
- Jim Sullivan – Lumber City Development Corporation

The following is a summary of the interviews conducted, followed by the redevelopment recommendations and market analysis findings.

### Strengths/Opportunities

During phone interviews and additional research, it was obvious that there are multiple strengths associated with the City of North Tonawanda. These strengths should be built upon and marketed to better capture new residents, new businesses and new spending. When asked to name the "number one" strength of the City of North Tonawanda was, respondents clearly identified the City's location. The City's location in western New York and surrounded on two sides by water, the Erie Canal to the south and the Niagara River to the west, provides numerous opportunities that the City can take advantage of and build on. Many of the interviewees mentioned the beautiful views available from Tonawanda Island and the enormous potential for a different kind of development on the Island than what currently exists. Tonawanda Island was identified as a unique resource for the City and its use/reuse should be carefully reviewed to ensure long term sustainability and successful redevelopment.

The Brownfield Opportunity Area is located directly on the water and therefore could capitalize on that asset. Local economic development officials are working on branding the Webster Street district as the "Gateway Harbor" to describe the downtown's location on the water and all the amenities that accompany the waterfront. The Gateway Harbor district branding and marketing effort will help capture boaters and others who may be unaware of what the City of North Tonawanda has to offer. Local officials have been working hard on this and have begun a way-finding program that includes new signs at the waterfront listing services, businesses and restaurants available within the district.

In addition to its location on the waterfront, the City's close proximity to the Canadian market is also a strength which presents an opportunity to attract Canadians to the area for vacation or day trips. Determining what Canadians are looking for and identifying the best way to attract them to the area will be key to capitalizing on this market. Local economic development officials have mentioned that a portion of the boaters during the summer are coming from Canada, showing a key target market for future campaigns.

Interviewees also mentioned the strength of the "downtown" feel of the City and the more historic areas. For example, the Riviera Theater and the Webster Street district have a "Main Street USA" feel that many people are looking for in older cities. While acknowledging that there is still some revitalization to occur, the fact that the City has an intact building stock of this style will better position them to promote reuse of existing structures for possible commercial and residential use. Maintenance and upkeep of these buildings will be key to the revitalization of the City of North Tonawanda and the surrounding areas. The Riviera Theater itself is a strength and the long history of putting on shows is something unique to the City. The Riviera Theater has been able to get larger acts and bigger names in recent years, helping bring regional crowds into downtown.

The City has been successful at hosting weekly concerts during the summer that bring in 4,000-8,000 visitors. The influx of activity on the nights when there are outdoor concerts has a great impact on the local merchants. The strength of these shows will help continue to bring new people to the area. The regional and local shows also will boost awareness of the recent trends of revitalization in the Webster Street area and will make everyone aware of what resources are available.

Another opportunity for the City is the exciting new development of a light industrial site into new loft style apartments known as Remington Rand. This development builds on two strengths of the community: the Webster Street downtown area and the waterfront. This construction project is likely to spawn additional development in the area and encourage others to begin similar projects. The Remington Rand project will offer a new product to residents of North Tonawanda ("live-work" lofts) and will bring "new blood" and enthusiasm for the area, accelerating the City's revitalization efforts and assisting in achieving local economic development goals. The developers and others familiar with the project have stated that they believe there is a market for this type of mixed-use, live-work space where residents can combine their office and home expenses and do their work from their loft apartment in the City.

Finally, improving the City's relationship with the neighboring Town and City of Tonawanda is an opportunity to revitalize both communities. The close proximity and shared use of the Erie Canal waterfront creates a chance to partner on projects to attract people to the area and share in the benefits. For example, partnering on events that would bring people to the waterfront could be an option, as would partnering on other water dependent to benefit both of the communities.

**Weaknesses/Threats**

In contrast to the strengths identified during the interviews and research, respondents noted weaknesses that could hinder redevelopment for the City. One of the most commonly identified weaknesses was the existing building

infrastructure located along the waterfront. The primary concern was that the current uses were not the "highest and best uses" possible for this prime location and that they may affect property value and diminish redevelopment potential.

A hindrance to the City of North Tonawanda's revitalization efforts includes its close proximity to other areas that have consumer amenities that many residents of the City are looking for and a lack of critical retail mass. For example, the interviewees mentioned that Niagara Falls Boulevard and Tonawanda are both built up with more of the chain stores, which many consumers are looking for. This pulls retail sales out of the community as they flow to other, more convenient, malls. The City will struggle to overcome this weakness and will need to identify other ways to lure shoppers to the downtown.

Cities all across the state and nation are struggling with getting shoppers back to their downtown. The keys will be the marketing the types of stores available and the ease of access. Improvements can be made to the buildings and streetscape that will encourage additional improvements and bolster the attractiveness at the site. The City and economic development departments are working on bringing stores and people back to the downtown by improving the streetscape, offering façade grants and general aesthetic improvements to the downtown shopping area. These improvements will go a long way to attracting retailers and their customers.

The City of North Tonawanda is also facing a challenge similar to many upstate New York communities, namely the declining population and the recent experiences of losing major employers. The City, with its perfect location on two bodies of water, developed as a mainly industrial community with blue collar roots. As these manufacturing and industrial employers and jobs move away, the community is faced with an economically depressed environment where it is difficult to attract new businesses and/or residents. The end of the manufacturing era for the City has left an inventory of building stock which is not of the quality that many people are looking for, making it unattractive for new companies or businesses to locate in the City, when they could locate in surrounding areas at a newer facility.

The older industrial buildings from the earlier manufacturing era have also left potential environmental concerns which make redevelopment of the sites unpredictable. The Brownfield Opportunity Area program will help reduce this unpredictability and hopefully improve the likelihood of reuse and redevelopment. The blue collar past of North Tonawanda has created an image issue for the City, one that has been hard for them to dispel.

The people interviewed noted that that City and the local services do not appeal to Presidents and CEOs of companies who typically make locational decisions. Due to the advances in technology, many businesses can locate anywhere they want, making the communities that offer outdoor recreation, good schools and other amenities more likely to attract new companies. The quality of schools came up as an issue, and during the interviews, people mentioned that improving on the schools will assist in the City's goals to encourage revitalization. Finally, the high tax rate has been a barrier to development for the City of North Tonawanda.

The City of North Tonawanda has done an excellent job with programming festivals, events and other reasons for people to come to the City during the summer, but it is during the winter that the draw is just not there. This lack of

activity is not only difficult for the city merchants, but it also makes it difficult to attract a hotel and other tourism services because of the seasonal nature of the events.

**Recommendations and Market Analysis Findings**

Informed by the data collected during the previous "existing conditions" sections, market analysis experience, additional research and conversations with various economic development officials, real estate agents and others with insight into the market, Camoin Associates developed a list of potential redevelopment options for the City of North Tonawanda BOA. These options will all require additional research into the financial feasibility and community acceptance of the individual projects, but the options listed below will meet unmet demands and appear to be realistic in the current marketplace.

Retail:

As seen in the existing conditions report and from further conversations with local residents, there is a market for additional retail in the City of North Tonawanda. The existing conditions report showed the high level of retail sales leakage occurring in the study area, illustrating the number of residents going outside of the area to purchase goods and services. The existing conditions report showed leakage in almost every retail category, and after further conversations regarding the retail market we learned that the surrounding towns and corridors, like Niagara Falls Boulevard, have many of the larger national chains that residents are frequenting. For example the Fashion Outlet Mall and Summit Mall in Niagara Falls have a wide variety of stores, Galleria Mall in Buffalo and Route 324 in Tonawanda are also quite built up. Since these areas are not very far from the downtown or BOA, it is easy for residents to shop at these stores, making it unnecessary and unlikely that these larger stores will also locate within the BOA. Along these same lines, there is already a Super Wal-Mart planned for Niagara Falls Boulevard within City of North Tonawanda limits, so additional big box development is unlikely at this time.

The City of North Tonawanda should focus on the reuse and reinvestment of smaller boutiques to add to the character of Webster Street. The City has developed a wide variety of events to bring people to the waterfront during the summer and the Webster Street area is positioned perfectly to capitalize on these tourists. During the summer months, it was reported that boats are docked four deep along the Canal in the Gateway Harbor district. The City can help the local stores by making sure they are well advertised near the docks and along the waterfront and by marketing to boaters and tourists all that the City has to offer. The boaters are mostly regional, so if they see that Webster Street is revitalizing it is easy for them to come back time and time again throughout the seasons and years. In addition to the summer visitors, the Riviera Theater has also been bringing more and more people to the area throughout the year, giving more opportunities for the restaurants and stores to capture customers who are in the area. Stores that will appeal to visitors from out of town and are reasonably priced will be successful.

The sales leakage analysis showed that there is a large percentage of sales at full-service restaurants going out of the area. A full-service restaurant could meet the needs of local residents who are looking for a different kind of restaurant than is currently available. Something moderately priced would do well to capture families and visitors to the area.

During the interviews, it was clear that a shared vision of the Gateway Harbor area included the ability to provide an afternoon or full day of activities for regional visitors. It was a goal that visitors would see the Gateway Harbor as a destination with activities for the whole family, a diversity of offerings and smaller stores with unique items. The tourists who may know about a local restaurant that they want to go to should find that they are coming to the area for lunch, but then end up spending a longer time because of the wide variety of stores that appeal to everyone. The branding of the area and marketing campaigns will help the City get past their current image issues.

Residential:

The completion of the Remington Rand project will be a huge boost to the local real estate market and will introduce a new type of housing unit to an area currently dominated by single family homes. The Remington Rand project will charge higher rents than is typical for the area and the revitalization efforts of the Gateway Harbor district may create demand for more moderately priced units in the downtown area.

Residential use is an allowable second floor use of the existing zoning code for the Gateway Harbor district. The renovation of vacant second floors within the downtown will help further the goals of revitalization and will help create a more active and viable community which will attract more residents and businesses.

The current number of single family homes within the City of North Tonawanda makes it unnecessary and probably unrealistic for more single family homes to be built within the BOA. In addition, there is a large population of elderly persons within the City who are currently living in their single family homes and who may decide to "downsize" in the coming years. This s demographic trend may create the demand for assisted living, senior housing, or "retirement communities". During the interviews it was determined that some high rise and low rise senior living facilities already do exist within the City and a recent 164 unit project was just built in the Town of Tonawanda, but linking the facilities to the water and views may provide an additional amenity that the other facilities are lacking. As demonstrated in the General Economic Outlook report, health care services will be a major growth industry in the coming years, and having senior care facilities and other health services will help the City to capture this growth of well paying, stable jobs.

Due to its unique location and spectacular views, Tonawanda Island was identified during the interviews as being a possible location for mid-to high-end condos. The market analysis and further discussion with locals has shown that this would need to be done in conjunction with some overall improvements to the island, shielding of the current adjacent industrial uses and a clear understanding of what the market will allow. The City of North Tonawanda currently has the highest average rents and mortgage payments of comparable western New York cities, and with the location and possible amenities offered, the condos could demand higher prices to make the project work. With the current national housing market, it would be necessary to plan this type of project out in phases and possibly even combine condos with rental properties and/or hotel rooms.

Office and Commercial:

The existing conditions report found that there was a significant amount of slack office space available in the area. This was confirmed during the interviews, along with the fact that many companies are looking for better quality

office space than is available within the BOA. However, Class A office space is already being built in surrounding communities, and the projected slow growth of office jobs in the area would make it unlikely that there will be much of a demand for additional large office space in North Tonawanda.

Although there is limited market for a brand new large office complex within the BOA, a more practical option would be working to renovate existing vacant second floor space into offices for smaller companies looking to locate in a more active downtown location. With the development of the Remington Rand live/work space nearby, there is the possibility that there will be an influx in small businesses and entrepreneurs in the area. As the economy begins to improve, it is likely many companies will be more interested in a second floor office in the Gateway Harbor district, with its lower rent demand and more vibrant atmosphere than a brand new office park. Focus should be placed on capitalizing on advances in technology which allow employers/ employees to locate anywhere and be in touch with their clients.

Industrial:

The existing conditions report indicates that industrial space-utilizing industries will grow slowly in the coming years. While the City of North Tonawanda has seen a decline in manufacturing and industry in recent years, there remains a strong base of smaller manufacturing and machine shops within the City. The decline of manufacturing has left a few remnants for the City, including some environmental concerns and a few vacant buildings along the waterfront.

The City and Lumber City Development Corporation (LCDC) have been working to clean up and remove any environmental concerns, including the remediation and redevelopment of the former Buffalo Bolt site in the north part of the BOA. This area will be capable of supporting the specifications of large and small companies seeking to locate in the area, and is also served by an active railroad spur. The LCDC should keep in mind that successful industrial development will likely include flex space with the ability to change with the times and ease of transportation access. Although the LCDC is working to attract new companies to the area, industrial development within the BOA should be limited to the Buffalo Bolt site; the remainder of the BOA should be marketed as a tourism-focused mixed use and waterfront destination.

Tourism:

The City of North Tonawanda has not taken advantage of the tourism potential which exists in the Buffalo-Niagara region. With its long history of a manufacturing and industrial community, it will be necessary to diversify the economy to ensure long term sustainability and employment opportunities for residents. Since the City lacks a supply of hotel rooms, potential does lie in the development of a small hotel to begin to capitalize on tourists to the region who may be visiting Niagara Falls, the Niagara Gorge and other heritage and cultural amenities in the region. Any hotel would need to have some type of unique aspect in order to capture visitors to the City who otherwise have many other options in the region.

One way the hotel could be unique is by marketing to the existing supply of boaters coming to the area as being accessible by boat, no car required. If possible, the hotel could have its own dock and marina as well as run shuttles

to the other public docks in the City or could be within walking distance of all the public docks. Marketing and advertising campaigns will be necessary to make sure that all those traveling within the region are aware of the unique facility and all the amenities available within the City of North Tonawanda.
Since the hotel demand is seasonal, it may be necessary to start out small at first to begin to build the demand for hotel space, or even combine the development with apartments and mixed-uses. By having a variety of uses, it is feasible that the project will not only attract more attention, but will also be financially successful.

If the City hopes to increase overnight stays within the City and attract boaters from a further distance, meeting the needs of boaters will be important. For example, the City may want to consider attracting a small convenience store that the boaters could use to buy supplies. The LDCD is working on building a hotel within the Gateway Harbor/Webster Street area, which could be marketed to boaters who are traveling the Erie Canal. The City could work with local retailers to offer incentives to those visiting to come to the area by offering discounted tickets to shows at the Riviera when combined with a local restaurant. The City will need to be created and build on local heritage and assets when working to build the local tourism economy.

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# APPENDIX C: BROWNFIELD SITE PROFILES

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