

# RETHINK WOODHAVEN

## REVITALIZATION PLAN





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## STATEMENT FROM THE MAYOR

“In any generation, there are few instances where remarkable opportunity is met with clear vision and bold leadership. The communities that seize these moments were transformed forever. Rome is facing one of these moments.

For decades, the Woodhaven military housing development sat vacant. 140+ structures across 70 acres fell victim to deterioration, vandalism, and decay. An entire neighborhood of people looked on while their property values plummeted.

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**WE'VE HAD ENOUGH. WE HAVE TAKEN CONTROL OF OUR FUTURE, LIBERATED THE PROPERTY FROM A LABYRINTH OF BUREAUCRACY, AND BEGAN THE PROCESS OF RETHINKING WOODHAVEN AND WRIGHT PARK MANOR.**

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The City responded by investing more than \$2M in acquisition, remediation, and demolition of the unsafe and unfit shells of former homes to pave the way for new investment. With the structures gone, we can finally begin to envision a fresh, lively neighborhood along

the new Mohawk River Trail that will be a nexus of ideas and community spirit.

We are at the cusp of transformation – largely because of the matchless capability of the Air Force Research Laboratory and the constellation of cyber tech firms at Griffiss. Together with one of the nation's only FAA Unmanned Aerial Systems Test Sites, Griffiss Tech Park is a crucible for innovation, national security, and commercialization. We intend to be ready to meet the demands of this new digital workforce.

Together with my project team and the Rome Common Council, **I am pleased to present the Re-Think Woodhaven Revitalization Plan.**”

**Mayor Jacqueline Izzo**





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# PURPOSE + OVERVIEW

## RATIONALE

### WHAT?

**A PLAN FOR PROGRESS.** The Re-Think Woodhaven Revitalization Plan sets the stage to revitalize and redevelop the underutilized Woodhaven site. It provides guidance and outlines specific actions necessary to realize the community's vision for what will become the most diverse, sustainable, and attractive mixed-use neighborhood within the Mohawk Valley – if not in all of Upstate New York.

### HOW?

**REPURPOSE** the 100+ acres of vacant, underutilized property at the Woodhaven site to eliminate blight in this area.

**INFILL** mixed-use development along the Floyd Avenue-MVCC-Griffiss corridor to grow the City's tax base.

**CONNECT** off-road pedestrian trails between downtown, MVCC, Griffiss Business Park, the Erie Canal, Lake Delta, and Rome's schools.

**PRESERVE** the Mohawk River and install more amenities along the Mohawk River Trail.

**ELEVATE** the City's urban appeal.

### WHY?

**ROME IS SPECIAL.** No other community in the region is as uniquely-positioned to capture employment growth in cyber, unmanned systems, and advanced manufacturing industries. No other piece of real estate is more primed for 21<sup>st</sup> century workforce housing than the Woodhaven site.



# VISION

## THE PATH FORWARD

Redeveloping this site is symbolic of Rome's progress and resiliency after the closure of the Griffiss Air Force Base. What was once the air force base is now home to the high-tech and advanced manufacturing companies that are pushing Rome's economy forward. With this redevelopment project, what was once base housing will become housing for Rome's emerging 21<sup>st</sup> century workforce.

The Woodhaven site has significant potential and our vision for its future works ambitiously to capture and leverage this potential, while remaining grounded by local market conditions. We envision a unique community that meets the changing needs of our current residents while also attracting a new generation of residents to Rome. We want to implement a market-supportable real estate program for the Woodhaven site that is modern and technologically-advanced but that still holds true to Rome's roots and celebrates our culture and community.

**“With the blight now gone, you can begin to **ENVISION A FRESH, LIVELY NEIGHBORHOOD** along the new Mohawk River Trail. An exciting place that connects Griffiss, MVCC, and downtown's east side. A globally-connected, modern place with smart-sensored streets; high-speed fiber, UAV-friendly. A place that encourages fitness and interaction with nature. A nexus of ideas, community spirit, and cultural diversity.”**

**Jacqueline Izzo**  
Mayor of Rome

## OUR VISION FOR THE FUTURE

Our vision for the Woodhaven site is for it to no longer be viewed as an eyesore and a burden, but as:



**fresh, new, and modern**



**connected**  
to nearby neighborhoods,  
schools, and employers



**extremely walkable**



**close to nature**



**retail-minded**  
with local and boutique shops



**unique and interesting**



**healthy**

## ALIGNMENT WITH OTHER PLANS + STRATEGIES

The Rethink Woodhaven Revitalization Plan follows from past local and regional planning efforts and aligns with state-wide principles for sustainable development. Here's how this Revitalization Plan supports and is supported by other plans and strategies:

### ONEIDA COUNTY VISION PLAN

The Oneida County Vision Plan focuses on improvements in multiple areas – including alternatives to vehicular transportation, accessibility, and connectivity – that align with the goals of the Woodhaven Revitalization Plan. Since 2014, the Vision Plan has also made concerted efforts to encourage and promote the kind of development recommended at the Woodhaven site by:

- adopting tax incentives (485a) to encourage development of housing options that meet the needs of the emerging workforce
- creating a Uniform Tax Exemption and Agency Benefits Policy to encourage the development of market-rate rental housing

### 2004 COMPREHENSIVE PLAN

Rome's 2004 Comprehensive Plan determined that Rome has few high-quality, mid-market housing options.

This type of housing is particularly important for attracting the young professionals and talented workers who are employed by the high-tech firms that Rome is trying to bring to the area. Without these high-quality housing options, businesses are less willing to relocate to or expand in Rome. Employees of local businesses are also less inclined to live in Rome, as many young professionals prefer rental properties – like townhomes and condominiums – that the existing housing stock in Rome simply does not offer.

Rome needs to attract not only firms, but also their employees and families as residents. To do this, the 2004 Comprehensive Plan noted that housing options in the City must be expanded and upgraded. The Revitalization Plan works toward this goal by providing high-quality townhome and rental options.

### COMPLETE STREETS

The Revitalization Plan supports alternative modes of transportation by implementing a complete streets policy that coincides with the 2011 NYS Complete Streets Act. This policy includes standards for roadway design that consider the safe, convenient access and mobility of users of all ages and abilities, including pedestrians and cyclists. Complete streets design features include sidewalks, crosswalks, bicycle lanes, and traffic-calming measures.

### SMART GROWTH

The Revitalization Plan was developed with, and to meet, the smart growth principles identified in the NYS Smart Growth Public Infrastructure Policy Act. These principles aim to minimize the unnecessary costs of sprawl development by encouraging compact development with a mix of land uses that preserves open space on the site.

# COMMUNITY ENGAGEMENT



# METHODOLOGY

Creating a master plan for the Woodhaven site is important not only for capitalizing on the redevelopment potential of the site but also for offering an opportunity for community healing. In discussing and working towards the master plan, community members are empowered to reclaim this long-disappointing space. Here's what we did to gather input about the future of the Woodhaven site:



x2

public  
meetings



x2

planning  
charrettes



x1

student  
outreach



x3

stakeholder  
outreach

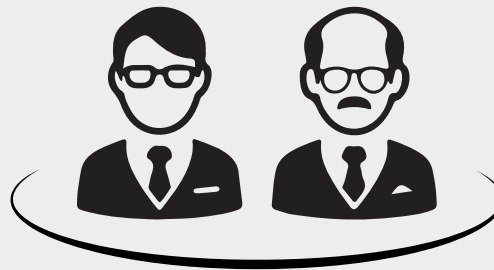


web +  
social media



## GENERAL PUBLIC

Through public meetings and social media, we sought to inform the public about this project and also give nearby neighbors, students at Rome Free Academy, and the community at large opportunities to provide feedback that would meaningfully impact the direction of the project.



## PRIVATE DEVELOPERS

Builders and developers from inside and outside the local market were interviewed to gather information about their first-hand experiences operating in Rome's housing market and insight into its potential.



## LOCAL BUSINESSES

Representatives from Rome Memorial Hospital, Rome City School District, and Mohawk Valley Community College were asked to identify how the increases in population, tax revenue, and demands for service that may result from the Woodhaven redevelopment could affect community needs.

## PUBLIC MEETING #1

Public Meeting #1 introduced participants to the project and allowed people to provide feedback about their vision for the future of Woodhaven site through an interactive charrette. During the charrette, small groups drew what they would like to see at the site on a map. They also discussed questions about their hopes and concerns for the site.



## DATE + LOCATION

## What does the revitalization of Woodhaven mean to you?

# opportunity

# hope

# vitality

## grow the tax base

## progress



## PUBLIC MEETING #2

Public Meeting #2 allowed participants to provide feedback on three conceptual alternatives for the layout and use of the Woodhaven site. The alternatives were developed to demonstrate the vast array of potential spatial configurations possible for the site, and were meant to serve as a means to elicit public discussion about uses and layouts that are best-suited for Woodhaven. This feedback was used to refine and iterate the master plan options, as discussed in the **Master Plan** section.

### Project Website

To reach as many stakeholders as possible, the project team also created a website that allowed people to stay up-to-date on and provide feedback about the Woodhaven revitalization project.

VISIT US AT  
[www.rethinkwoodhaven.com](http://www.rethinkwoodhaven.com)



### DATE + LOCATION

May 23<sup>rd</sup>, 2017  
MVCC Community Room  
Total Attendance: 25-30





# KEY FINDINGS

## From Public Meetings

### LEVERAGE THE LOCATION

The community stressed the importance of leveraging the success of the Griffiss Business and Technology Park by developing uses at Woodhaven that complement Griffiss. Housing, food options, and convenience retail – for example – could encourage Griffiss employees to live in the area or to visit local businesses.

Many comments also noted the Woodhaven site's proximity to the Mohawk River and that the Mohawk River Trail runs through the site. This connection to nature should be preserved and the Mohawk River Trail in particular should be highlighted and celebrated in any future development.

### CREATE PUBLIC AMENITIES

The community showed strong support for amenities that would be open to the public at large including a sports complex, event spaces, a public market, and green space.

### PROVIDE HOUSING OPTIONS

Community members were in favor of providing additional housing, on the condition that it was of the type not currently available in the area. To that end, they favored multi-family housing options – such as townhomes and apartments – as opposed to the single-family housing that dominates Rome's housing market.

The target populations identified for these types of housing were millennials and empty-nesters, who favor high-quality options and can afford mid- to high-level price ranges. These options would help Rome retain current residents whose housing needs are changing, while also attracting new residents, especially those who work at the Griffiss Business and Technology Park. Approximately 70% of Business Park employees do not live in Rome, signaling a large market of young professionals to capture with the modern and high-quality housing options that they prefer.



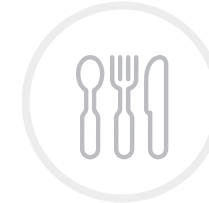
#### APPENDIX

See Appendix A for all the public meeting materials, including presentations and notes.

### What is Rome missing? according to you



new housing  
options



restaurant and  
food options



indoor sports  
complex



community center /  
meeting space

## BUSINESSES + INSTITUTIONAL OUTREACH

Mohawk Valley Edge facilitated a series of interviews with local businesses and institutional stakeholders regarding potential impacts they could face as a result of build-out of the Woodhaven site. Here's what they had to say:

**“ THIS PROJECT ... PAVES THE WAY FOR NEW HOUSING AND RETAIL DEVELOPMENTS THAT WILL POSITIVELY IMPACT THE MOHAWK VALLEY REGIONAL ECONOMY.”**

**Kenneth Tompkins**

Mohawk Valley Region Director,  
Empire State Development



### ROME CITY SCHOOL DISTRICT

Any new housing development will likely impact the City of Rome school district if these new residents are families with school-aged children. However, the estimated impact of new housing is not expected to place an undue burden on the School District, since the city's schools were able to accommodate families in the former Woodhaven neighborhood at a time when the city's population was twice what it is now.



### MVCC – ROME CAMPUS

Housing development at Woodhaven has the potential to directly support MVCC students by providing housing that is geared towards the needs and preferences of college-aged students and young professionals, and that is within walking distance of MVCC's Rome campus. It is also important to ensure that transit connections, like sidewalks and bus routes, are available between the Woodhaven site, MVCC, Griffiss Business and Technology Park, and other nearby destinations.



### GRIFFISS BUSINESS + TECHNOLOGY PARK

Connecting the Woodhaven site to Griffiss Business and Technology Park is important for creating a synergistic effect between these two locations – where employees and residents can take advantage of the businesses and services at each location. It may be possible to connect the Mohawk River Trail to the existing pedestrian trail network at the Griffiss Campus, thereby creating an off-road link between the two locations.

## PRIVATE DEVELOPER OUTREACH

There was a general consensus among developers that the Rome housing market lacks high-end, modern options targeted at the young professionals and medical personnel working at the Business Park, in Rome, or in Utica, those who are looking to downsize, and seniors and empty-nesters.

The developers saw a significant opportunity for senior housing, either in the form of apartments, garden-style multi-family units, or single-family units. They also reiterated a comment received during the public meetings: housing should be provided with public amenities like access to the Mohawk River Trail and open spaces for residents to gather and be active.

### WHAT ROME HAS



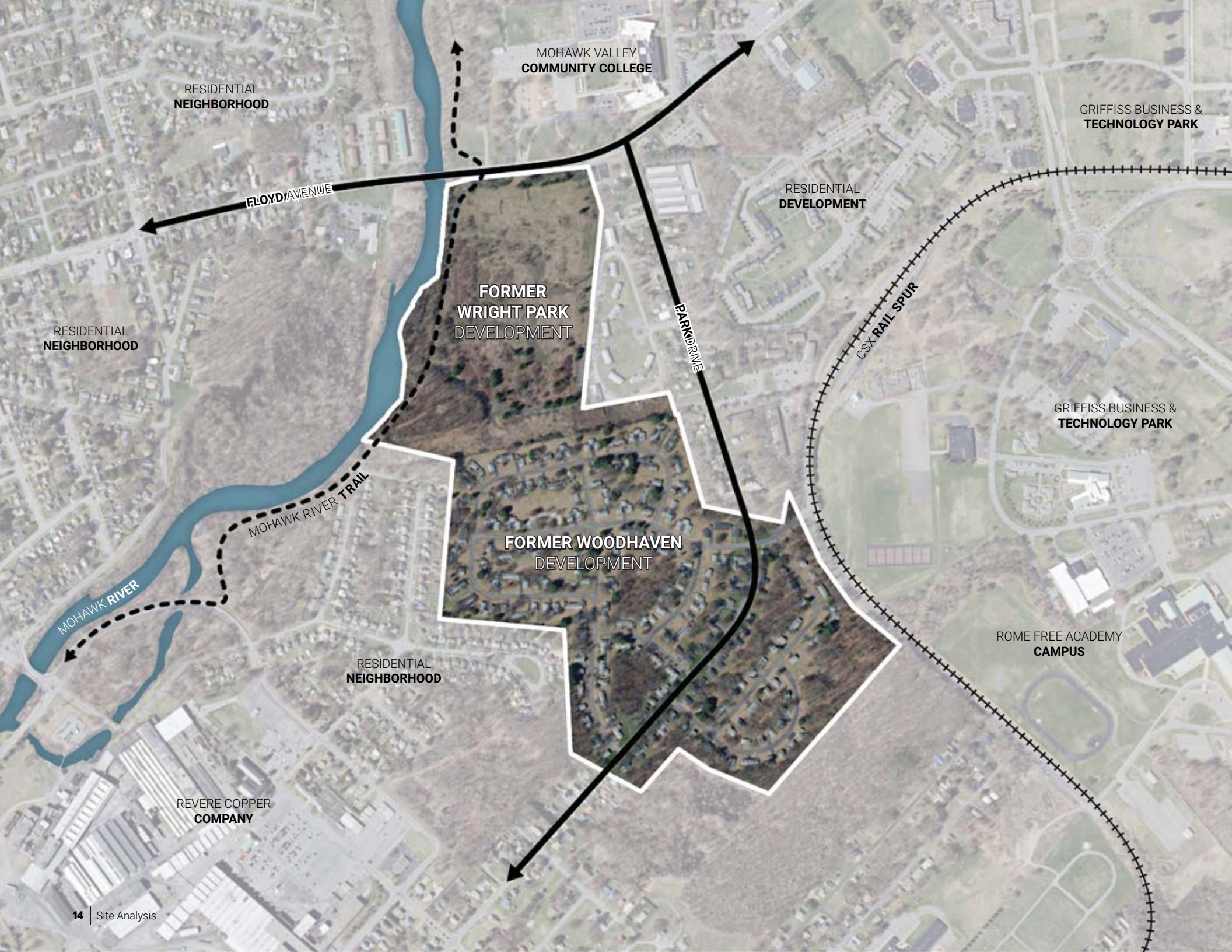
### WHAT ROME NEEDS





# SITE ANALYSIS





RESIDENTIAL  
NEIGHBORHOOD

MOHAWK VALLEY  
COMMUNITY COLLEGE

GRIFFISS BUSINESS &  
TECHNOLOGY PARK

FLOYD AVENUE

RESIDENTIAL  
DEVELOPMENT

FORMER  
WRIGHT PARK  
DEVELOPMENT

PARK DRIVE

CSX RAIL SPUR

RESIDENTIAL  
NEIGHBORHOOD

GRIFFISS BUSINESS &  
TECHNOLOGY PARK

MOHAWK RIVER TRAIL

FORMER WOODHAVEN  
DEVELOPMENT

ROME FREE ACADEMY  
CAMPUS

MOHAWK RIVER

RESIDENTIAL  
NEIGHBORHOOD

REVERE COPPER  
COMPANY



## SITE HISTORY

**BEFORE  
1994**

The site is home to single-family and multi-family dwelling units. Many of its occupants work at the Griffiss Air Force Base.

**1994**

The single-family homes on the Park Drive parcel are vacated.

**1995**

Griffiss Air Force Base closes.

**2004**

The multi-family homes on the Floyd Avenue parcel are vacated and demolished.

**AFTER  
2004**

Several developers attempt to reuse and redevelop the properties but are unsuccessful.

**2015**

The City of Rome acquires the entire site, with the intention of redeveloping it as a mixed-use community.

**2016**

Empire State Development (ESD) awards the City of Rome \$1.5 million in funding to demolish the longtime vacant structures within the Park Drive parcel.

**2017**

The remaining structures at the Woodhaven site are demolished. Asbestos removal is performed.

**2018**

This master plan is created.

**WOODHAVEN SITE**

■ prior to demolition



Walkability  
**79**/100  
**DOWNTOWN**

Walkability  
**56**/100

Walkability  
**26**/100

**GRIFFISS BUSINESS +  
TECHNOLOGY PARK**

**WOODHAVEN  
SITE**

**ROME FREE ACADEMY  
CAMPUS**

BLACK RIVER BOULEVARD

FLOYD AVENUE

MOHAWK RIVER TRAIL

MVCC

CSX RAIL

ROUTE 825

MOHAWK RIVER

EAST DOMINICK STREET

ROUTE 49

ERIE CANALWAY TRAIL

ERIE CANAL



## SURROUNDING CONTEXT

### A CHANCE TO REPAIR THE URBAN FABRIC

The redevelopment site is perfectly situated – almost like a missing puzzle piece – between the edge of the existing neighborhoods of East Rome to the west and the Griffiss Business and Technology Park and Rome Free Academy to the east. To repair the urban fabric and reconnect these areas, the redevelopment plan includes housing as well as other compatible uses, like commercial, recreation, and professional offices, that complement the existing residential land use.

### URBAN AMENITIES BALANCED BY NATURE

The site is also centrally-located, just miles from downtown Rome and within walking distance of the Griffiss Business and Technology Park, MVCC, and Rome Free Academy. Easy access to retail offerings, medical practices, and gas stations is also provided along Floyd Avenue – the corridor that connects downtown Rome to the Business Park. These urban amenities are balanced by proximity to nature, with the Mohawk River and the Mohawk River Trail acting as the western boundary of the site. The site is also just 5 miles south of Delta Lake State Park.

**“FOR SO LONG, GRIFFISS HAS BEEN SEEN AS AN ISLAND. THIS PROJECT IS AN OPPORTUNITY TO INCORPORATE IT INTO AN ECOSYSTEM.”**

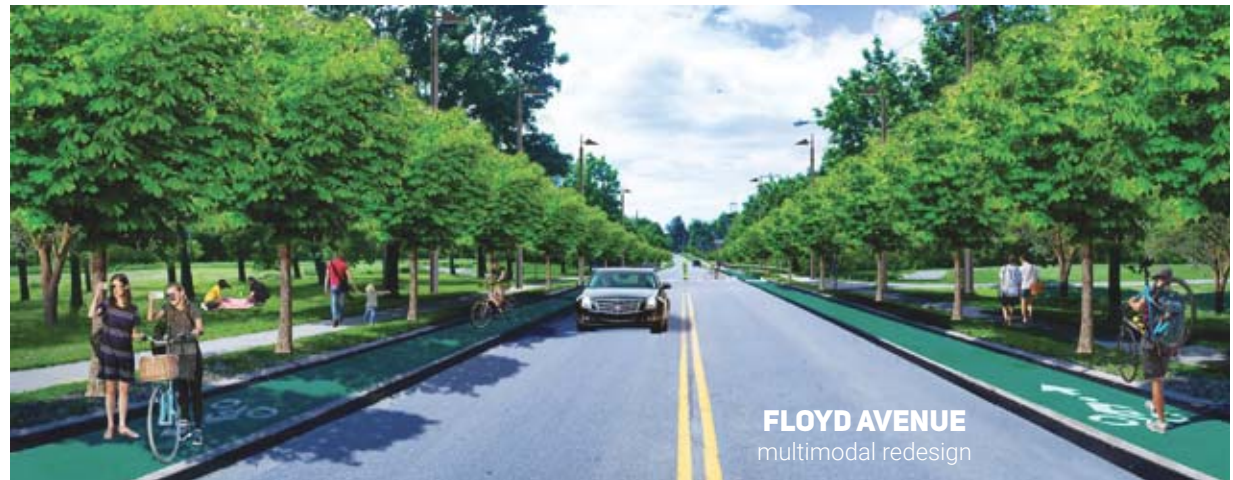
**Jennifer Waters**

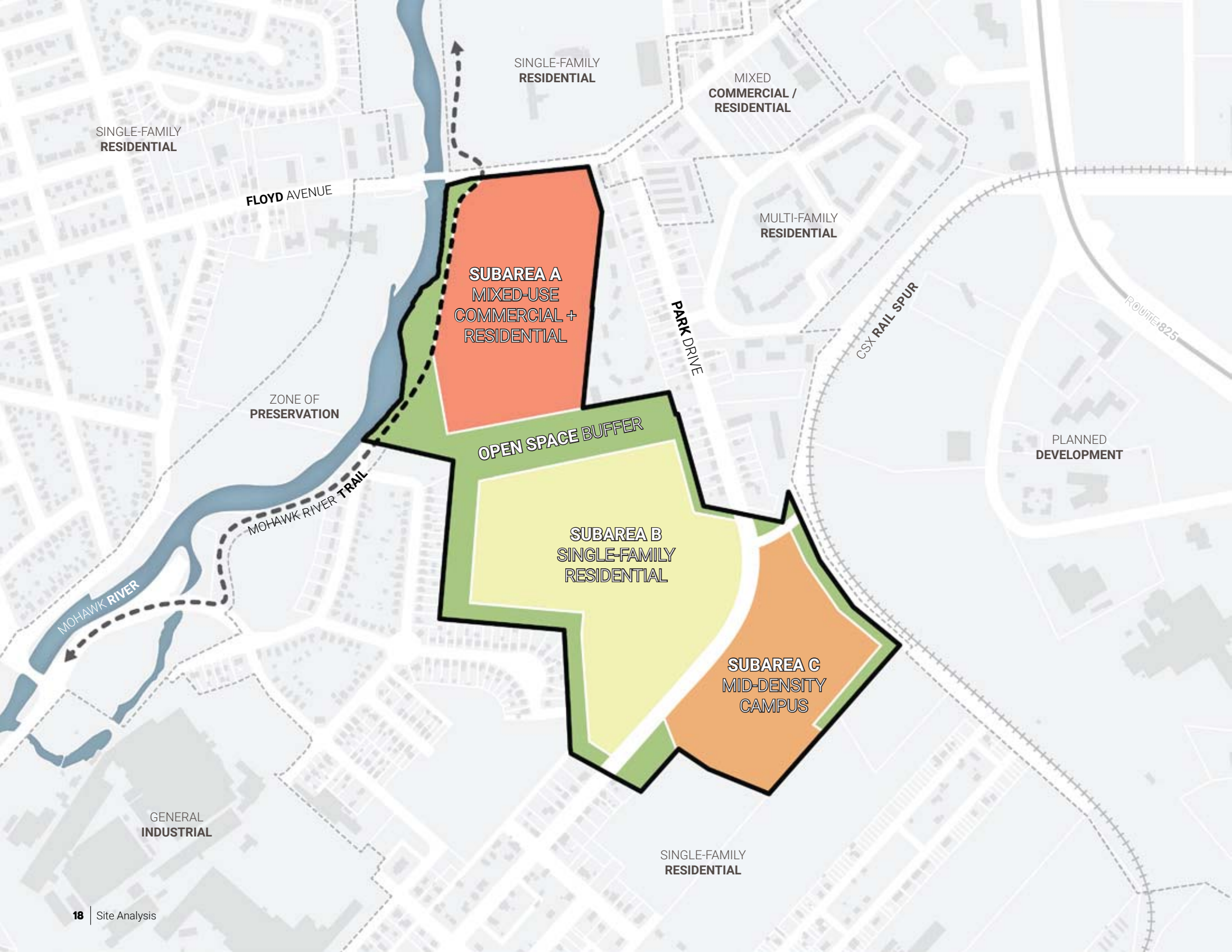
Vice President of Communications,  
Mohawk Valley EDGE

### What is the Floyd Avenue Stitch?

Floyd Avenue is the thread that stitches – or connects – downtown Rome to the Griffiss Business and Technology Park. Presently, however, this corridor – especially near the Woodhaven site and Griffiss – is not conducive to connectivity; a lack of walkability along Floyd Avenue serves to isolate these areas from downtown.

Making Floyd Avenue walkable and bikeable along its entire length (as shown below) will be important to stitching the Woodhaven site back into the city's urban fabric.





# ZONING

As part of this project, a new, form-based zoning code was developed for the Woodhaven Redevelopment District. The district is divided into three subareas and an open space district, each with different regulations and uses as described at right.

The code is structured to harmonize single-family, multi-family, and mixed-use structures and to provide for a variety of uses including residential, retail, and recreation. The code also employs smart growth principles by encouraging trail and sidewalk connections between existing streets and surrounding neighborhoods and by prioritizing the preservation and enhancement of natural resources, trees, and public green spaces along the Mohawk River.

## B

### APPENDIX

See Appendix B for the complete Woodhaven Revitalization District Form-Based Zoning Code.

### **SUBAREA A MIXED-USE COMMERCIAL + RESIDENTIAL**

Buildings should front Floyd Avenue to enhance the sense of a commercial corridor and create a streetwall.

Buildings should also extend along the primary entrance into the Woodhaven community, pulling the streetscape aesthetic into the interior of the site.

Buildings on the western portion of this subarea should interact with the Mohawk River, allowing the public to engage with the river and the trail.

First-floor retail stores and restaurants should have semi-private patios and outdoor spaces to encourage commercial uses to spill outside.

Multi-family housing should have a walkable layout, with pedestrian connections to the Mohawk River.

Allows for recreational uses such as sports fields and open spaces, as well as a possible indoor sports complex.

### **SUBAREA B SINGLE-FAMILY RESIDENTIAL**

Allows for small-lot, single-family houses arranged in a compact layout.

### **SUBAREA C MID-DENSITY CAMPUS**

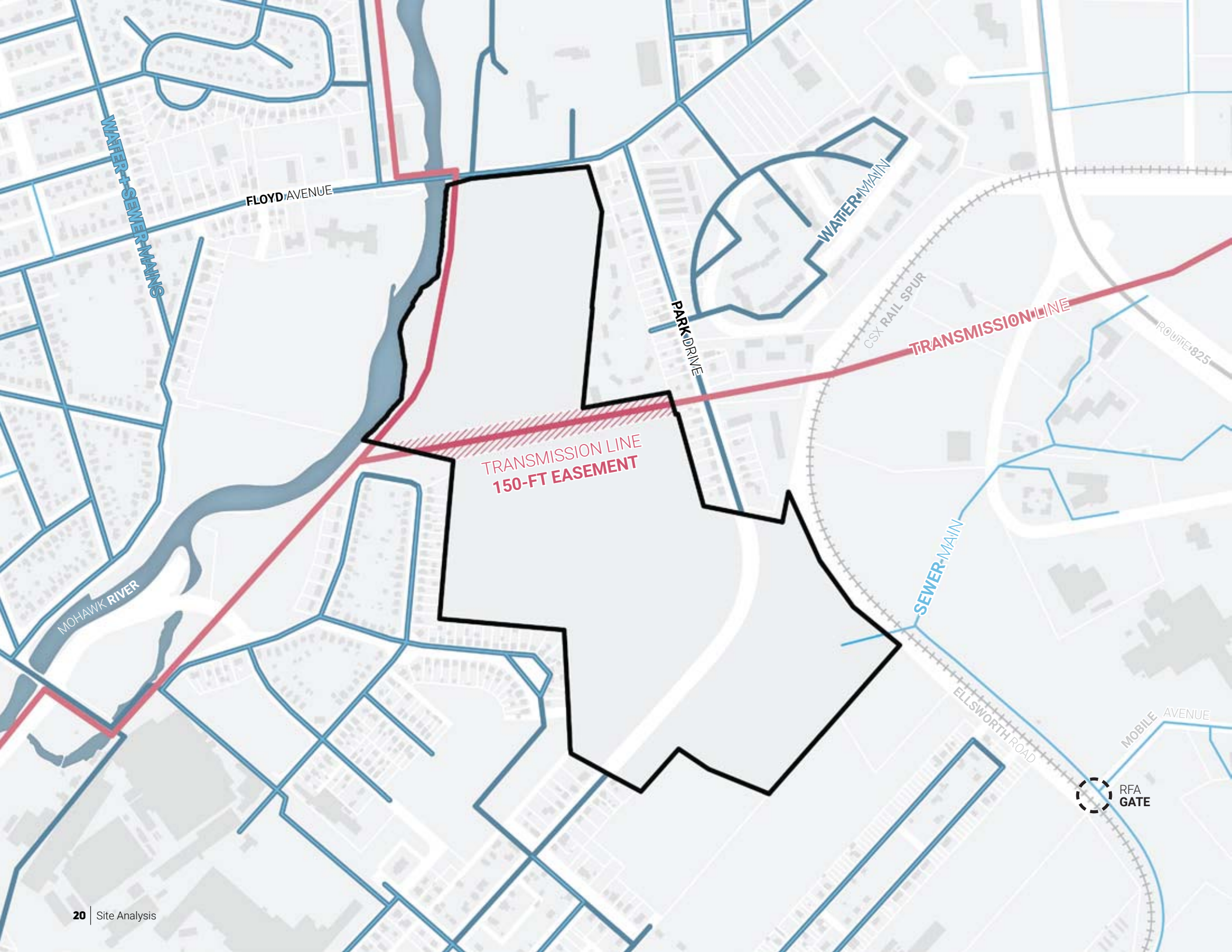
Allows for higher-density residential uses, like townhomes, apartments, and senior living complexes that should be connected via trails.

### **OPEN SPACE BUFFER**

Provides forested, natural spaces to buffer between incompatible uses.

Multi-use trails should connect these spaces to each other and to other destinations within the site.





# INFRASTRUCTURE



## **WATER, GAS, + SEWER**

As a former neighborhood, the Woodhaven site is served by municipal water, sewer, gas, and electric utilities along Floyd Avenue and Park Drive. Though pipes, manholes, and other remnants of the old utility network still exist on the interior of the site, these facilities have not been maintained and are conducive only to the previous arrangement of houses on the site. It is recommended that these facilities be removed and replaced with new tie-ins.



## **POWER LINES**

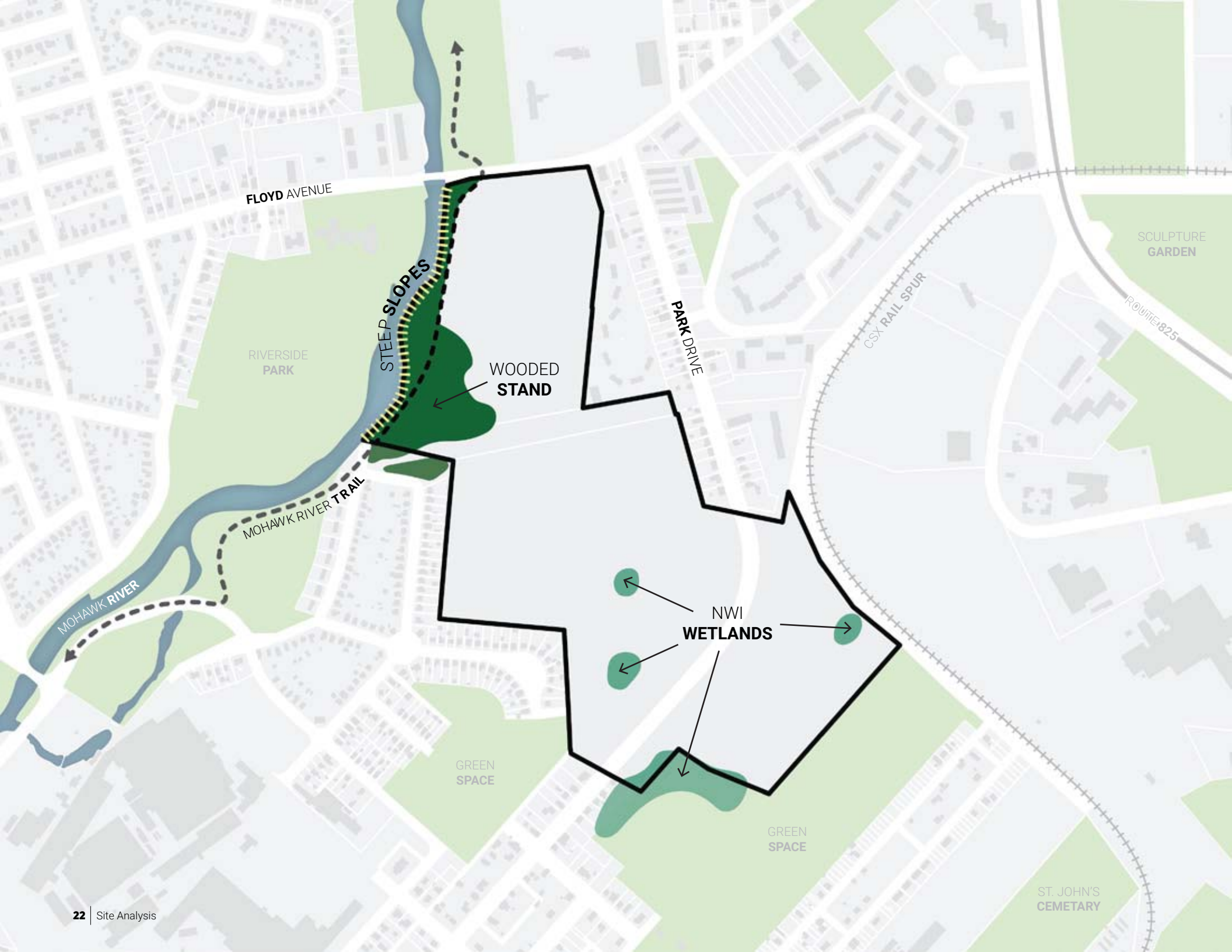
Overhead, electric transmission lines bisect the site, running east to west from Park Drive to the Mohawk River. Within the 150-foot power line easement, development is restricted; only open spaces or parking lots are appropriate for this area. Roads and pedestrian walkways are also allowed to cross the easement, and could be used to link the northern and southern portions of the site.



## **RAILROAD**

A rail spur from the CSX mainline that serves Griffiss Business and Technology Park runs alongside the eastern boundary of the site, creating a barrier to vehicular and pedestrian circulation. An at-grade railroad crossing would be required to connect Ellsworth Road to Mobile Avenue on the RFA campus. It may also be possible to create a pedestrian crossing over the railroad that would provide a more direct route to the Business Park or RFA than is currently possible by following existing sidewalks.





FLOYD AVENUE

RIVERSIDE  
PARK

STEEP SLOPES

WOODED  
STAND

PARK DRIVE

CSX RAIL SPUR

SCULPTURE  
GARDEN

ROUTE 825

MOHAWK RIVER TRAIL

MOHAWK RIVER

NW1  
WETLANDS

GREEN  
SPACE

GREEN  
SPACE

ST. JOHN'S  
CEMETARY

# NATURAL ENVIRONMENT

## MOHAWK RIVER + TRAIL

The Woodhaven site enjoys more than 1/4-mile of waterfront along the Mohawk River. The paved, off-road Mohawk River Trail also runs the entire length of this waterfront, providing direct water access on the southern portion of the site and expansive views of the river on the northern portion of the site, where 15-foot slopes separate the trail from the water. Buildings along the northern portion of the river should engage with the trail, and be positioned in such a way to take advantage of waterfront viewsheds and provide for additional overlooks. Along the southern portion of the site, potential exists to create a more formal landing for fishing or to launch kayaks and other non-motor boats.

## TREES

The riparian buffer along the eastern bank of the Mohawk River is comprised of a variety of tree species – including maple, oak, ash, hickory, cherry, poplar, white pine, and hemlock – that give the site a forested feeling and also provide a habitat for songbirds, mammals, amphibians, and other wildlife.

## WETLANDS

The U.S. Fish and Wildlife Service's National Wetlands Inventory (NWI) identified four, small wetland areas in the southern portion of the site. Though these wetlands are not subject to the kinds of regulations that Department of Environmental Conservation (DEC) wetlands would be, the conservation and protection of their ecosystems should be strongly promoted when considering redevelopment.

## SOILS

The Alton-Urban soils that make up the majority of the site are deep, well-drained, and have few or no limitations as a foundation for dwellings, making the Woodhaven site an ideal location for new housing. Further study should be undertaken to confirm that the soil can support the weight loads of new roadways and proposed structures.

## The Value of Nature

The Woodhaven site's close proximity to the Mohawk River and its position along the Mohawk River Trail are significant assets that make the site more livable and more attractive to potential residents and developers.

In fact, views of and access to nature have been shown to:

- increase frequency of exercise
- make people happier and healthier
- increase nearby property values





# MARKET ANALYSIS

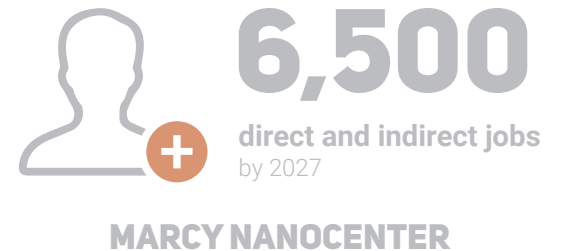
## OVERVIEW

As part of a comprehensive Market Analysis, local and regional economic and demographic trends were studied to identify viable development types and create a market-supportable real estate program for the Woodhaven site. The findings of this analysis were used to inform the various alternatives included in the **Master Plan** section.

### ECONOMIC TRENDS

For many years, Rome has been working to recover from the loss of the manufacturing jobs that were once a staple of our economy. After the 1960s, Rome's economy steadily declined, as jobs were out-sourced to lower-cost markets and local companies struggled to stay at the forefront of their industries. As the manufacturers left, the skilled and educated workforce did too – in search of more favorable employment opportunities elsewhere.

But things are changing now – jobs are coming back to Rome and the regional economy is growing. The Marcy Nanocenter, located just 15 miles southeast of the Woodhaven site, is expected to create about 1,000 direct jobs and 5,500 indirect jobs in the next decade. The Griffiss Business and Technology Park, located less than a mile from the site, has helped Rome recapture



some of the jobs lost to the closure of the Air Force Base, and currently offers some of the highest salaries in the city. Job growth in the cybersecurity, unmanned aerial systems (UAS), advanced manufacturing, and other high-tech sectors proves that Rome is once again on the cutting-edge of technology, and that our economic outlook is bright.



# OVERVIEW

## DEMOGRAPHIC TRENDS

Since the closure of the Griffiss Air Force Base, Rome's population has been slowly and steadily declining. Some of this decline can be attributed to the out-migration of the younger, educated population, many of whom have left the area in search of jobs that better match their skill sets. This exodus has left our workforce less educated than the national average, with only 12% of residents having a bachelor's degree compared to 18% nationwide. This deficiency makes our workforce less able to meet the demands of the new, highly-skilled jobs that are coming to the Marcy Nanocenter and Griffiss Business and Technology Park.

An influx of highly-educated, young workers will likely come to Rome to fill these new positions, giving us a significant opportunity to provide housing that will encourage these workers to live in Rome, rather than to commute from outside the city. Many of these workers will be highly-paid, enabling them to afford more expensive, amenity-rich housing. The Woodhaven site, because of its proximity to the Business Park, is the perfect location for more diversified housing options that cater to and attract this 21<sup>st</sup> century workforce.

The target demographic for the Woodhaven site includes people like...



JENNA

**? Background.** She is a 25-year-old graduate of Hamilton College who now works as a software engineer at Griffiss Business and Technology Park.

**\$ Finances.** She brings home \$100,000 per year, and can afford \$2,000 in monthly rent.

**! Extras.** She wants to live in a place that feels urban but without the high prices of a big city. She also wants to be within walking distance of restaurants, bars, and a happening nightlife scene.



PAUL

**? Background.** He and his wife, Liz, are in their early 70s. They're empty-nesters and are looking to move into a smaller place.

**\$ Finances.** They've been diligent about saving and can afford about \$1,500 in monthly rent.

**! Extras.** They want to live in a place that has a great sense of community, where they can socialize regularly with their neighbors. They also want to be able to stay active, so bicycle trails and access to nature are a must.



# RESIDENTIAL MARKET

## SINGLE-FAMILY HOUSING

In Rome's current housing market, single-family housing is not profitable for developers without some sort of financial incentive. Considering this constraint – as well as the fact that the majority of Rome's housing stock is already single-family – additional single-family housing at the Woodhaven site is not preferable.

Likewise, single-family housing is not particularly attractive to millennials – who prefer urban-style living in higher-density units – nor to young families – who may be looking for cheaper, rental options before purchasing their first home. Empty-nesters are also moving away from single-family homes, and are looking to downsize into smaller units.

Townhouses could be attractive to both of these demographics, as they provide smaller units that still allow for the "single-family" experience. Townhouses, because of their density, are also better able to support nearby retail – about 3 times the amount of retail than could a single-family development on the same plot of land.

If single-family housing must be included at the Woodhaven site, it should be located between the existing single-family neighborhoods on the eastern and western sides of the site (in what was the former Woodhaven housing development) to preserve the residential feel of this area.



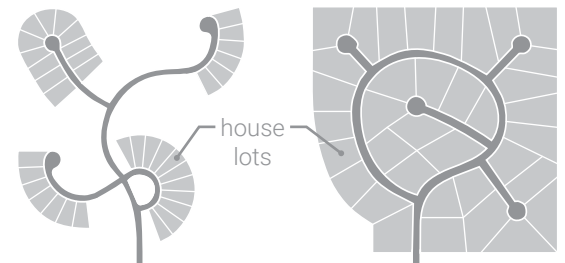
### THE VERDICT

Avoid single-family housing.

If necessary, use compact, single-family housing to bridge the existing single-family neighborhoods adjacent to the site.

### What kind of single-family housing would be acceptable at Woodhaven?

Single-family housing at the Woodhaven site – although not recommended – should follow Smart Growth principles if developed. Smart Growth developments are compact, with small house lots that preserve as much open space as possible.



**Compact Development**

36 house lots

5 acres of open space

**Traditional Development**

36 house lots

0.5 acres of open space

# RESIDENTIAL MARKET

## MULTI-FAMILY HOUSING

Multi-family apartment rental is the most in-demand housing option nationwide. The existing multi-family rental market in Rome is strong, with available units reaching almost full occupancy despite having only the most basic amenities and finishes. What Rome needs is high-end, amenity-rich stock that is attractive to young professionals and millennials. The only high-end offering in Rome – the Delta Apartments – was quickly occupied, demonstrating how this type of residential development is particularly sought-after in the city.

An upscale multi-family or townhouse development with a mix of apartment sizes and high-end, on-site amenities would appeal to both empty-nesters and the high-tech employees working at Griffiss Business and Technology Park. Considering the average salaries of these high-tech jobs, GBTP employees can afford rents of up to \$2,000 per month – which would make higher-end options at the Woodhaven site feasible. However, so as not to price-out others in the local community – including empty-nesters – proposed rents at Woodhaven's upscale apartments should be between \$1,300 per month for 1 to 2 bedroom units and \$1,500 per month for 2 to 3 bedroom units.

Based on demographic and economic conditions, the Woodhaven site could support at least 150 units of upscale apartments targeted at young professionals and millennials, and another 50 townhouses targeted at empty-nesters and young families. These units, particularly the apartments, should be developed in a phased approach to keep pace with job creation in the area.

Apartment housing at the Woodhaven site would help meet the needs of employees at the nearby Business Park and could also support future job creation at the Marcy Nanocenter. The townhouse units would be attractive to empty-nesters who are looking to downsize. The Woodhaven site also has the ability to differentiate itself by leveraging its natural assets and providing complementary recreational and outdoor amenities that would appeal to these demographics. However, multi-family units at the Woodhaven site would probably not be able to support students at the MVCC Rome campus as on-site rents would exceed a typical student's budget for living expenses.



## THE VERDICT

The site can support 150 apartment units and 50 townhouse units.

Rents should range from \$1,300 to \$1,500 per month.

Units should be upscale with unique amenities.

Target demographics should be millennials and empty-nesters.



# RESIDENTIAL MARKET

## SENIOR HOUSING

Rome's population is older than the national average, and also has a larger percentage of empty-nesters and of those aged 65 or older. This large demographic, taken in consideration with high occupancy levels at other senior properties in the Rome area, may appear to show potential for senior housing at the Woodhaven site.

However, this potential must be checked by the financial means of the area's seniors, many of whom appear – at least on paper – unable to afford the high costs of these facilities without either familial or government support. The ancillary services required for senior living facilities – including healthcare, dining, and programming – combined with high property taxes, make senior living expensive, even more so if the units are single-family.

To lower costs, senior housing at the Woodhaven site should be offered in denser, multi-family units. Low-income housing tax credits and other financing incentives should be considered to keep prices in the affordable range.



### THE VERDICT

Senior housing options should be multi-family, not single-family.

It is important to keep costs down so that units remain affordable for area seniors.



### How much does senior housing cost?

The services and amenities often included in assisted senior living facilities – like healthcare, dining, transportation, entertainment, and recreation offerings – make these facilities pricey. In fact, the average annual cost to live in an assisted senior living facility in the U.S. is \$45,000. Assuming that seniors in the Rome area are bringing in (a rather generous) \$53,000 per year, they would still need to put over 80% of their income towards housing costs – while 25% is generally considered the affordable threshold.



average monthly  
rent of senior  
living facilities in  
the Rome area

monthly rent  
that area seniors  
can afford

# COMMERCIAL MARKET

## RETAIL

It is becoming increasingly difficult for brick-and-mortar stores to compete with online retailers, especially in smaller markets like Rome, where the cost and risk required to open a physical store can be quite high. Millennials – especially the higher-paid millennials that are a target demographic for the Woodhaven redevelopment – are increasingly willing to shop online for everything from clothes to furniture. Any new retail at the Woodhaven site should therefore be niche or unique, so as not to compete with online retailers.

Physical retail, however, still has the edge over e-commerce when it comes to food. Online retailers have yet to figure out how to capture the grocery market and certainly cannot compete with experience-oriented establishments like restaurants and bars. Food offerings that are organic, sustainable, locally-produced, or unique in some way are particularly attractive to young people and would distinguish retail at the Woodhaven site from other establishments in Rome. Grill pubs, craft breweries, and wine bars might also be successful at the Woodhaven site, considering its proximity to the Heart of New York Craft Beverage Trail and the culture of craft brewing in Upstate New York. These establishments would also support the nightlife scene at the Woodhaven site, and could create a draw for visitors.

Based on an analysis of retail leakage, it is clear that Rome residents are spending money outside of Rome to purchase necessary goods and services. This situation presents an opportunity to fill retail gaps in the Rome market and to re-route and capture spending in the city. From this analysis, it was determined that the Woodhaven site can support between 27,000 and 37,000 square feet of new retail, assuming that the primary focus of this development is on food establishments and grocers, and that this retail is not programmed to compete with typical mall retail, whose supply is already satiated by the Sangertown Square Mall in nearby New Hartford.

The analysis also showed that much of Rome's existing retail establishments are in lower-end properties in unappealing strip malls, and that average vacancy at these retail properties is quite high – approximately 58%. While demand is not exceeding supply for retail properties in Rome, the overabundance of lower-end properties and their high vacancy rates suggests that the Rome market lacks the higher-end or Class A-type retail that is trending in today's market. Rome's market needs retail that is hip and unique, and that provides the kind of urban shopping experience that millennials crave.



## THE VERDICT

The site can support between 27,000 and 37,000 square feet of retail.

Retail should be primarily food-related. Offerings with the most potential include:

- year-round farmers market
- unique restaurants, bars, pubs, and grills
- convenience retail
- food and grocery that is unique and has a mid- to smaller-footprint, such as Trader Joe's or Aldi

Retail should be unique and niche.

Retail properties should be upscale and integrated into the community, not stand-alone, cookie-cutter foot prints.

# COMMERCIAL MARKET

## HOTEL

Occupancy rates at brand-name hotels in the Rome-Utica region are 65% and rising, and are almost consistent with national averages – which is particularly respectable in a small, Upstate New York market. Room-night demand is also rising, with the highest demand occurring in August and September – a time of year that is normally associated with an up-tick in business clientele and waning leisure travel. In fact, the most popular nights for hotel stays in the Rome-Utica area are Tuesday and Wednesday, when business travelers typically stay at hotels.

These findings suggest sufficient demand to support a new hotel in Rome, especially one that caters to business travelers. An upscale extended-stay hotel would be the most appropriate fit, as these hotels are often favored by business travelers. This type of hotel would also fill a gap in the Rome-Utica market, since there is only one other property in the area that provides the extended-stay experience (Griffiss Park Suites).

Overall, the Rome-Utica market could most likely support 100 new rooms priced on the higher-end at approximately \$120 per night on average. Amenities included should cater to young, business travelers – with conference rooms, shuttles to the Business Park, as well as dining and fitness options.

It should be noted that a new hotel in Rome could not expect to be supported primarily by visitors to the nearby Turning Stone and Vernon Downs casinos, as most of these visitors stay in casino-owned or associated hotel properties. Rome's distance from these properties also precludes it from capturing much of the casino-related hotel demand. A new hotel in Rome should expect – at best – only minimal casino overflow demand on weekends.



### THE VERDICT

An upscale, extended-stay hotel that caters to business travelers would be appropriate for the site.

The Rome market could support up to 100 new hotel rooms.

Average rates should be around \$120 per night.



#### Extended-Stay Hotel Room

More like a studio apartment than a hotel room. Length of stay can vary from a week to a month.



#### Regular Hotel Room

Lacks amenities (like a kitchenette) that would be needed for longer stays. Length of stay is less than a week.

# COMMERCIAL MARKET

## OFFICE

Any office space located at the Woodhaven site would be in direct competition with available space at the Griffiss Business and Technology Park, which provides access to resources and infrastructure that the Woodhaven site could not match. Considering these constraints, no office, research and development (R & D), or industrial space is recommended at the Woodhaven site.

However, the Woodhaven site could support approximately 3,500 square feet of co-working space, since this space would be small enough not to flood the market and would provide a different working environment than the existing spaces available at the Business Park. Co-working space is also particularly good at supporting innovation and would be a draw for entrepreneurs, start-ups, and young professionals – demographics that Rome needs to match our workforce with the demands of our job market.



### THE VERDICT

The site can support 3,500 of co-working space, so long as this space does not directly compete with space at the Business Park.

No office or research and development space is recommended for the site.



### Why co-working works for Woodhaven.

Co-working allows entrepreneurs, freelancers, and other remote workers to work together in the same space on their own independent ventures. These spaces normally just charge a membership fee, and are therefore more affordable than the long-term agreements and sunk costs associated with renting space at the Business Park or purchasing one's own building – especially for cash-strapped companies like start-ups and small businesses.

78%

of co-workers are  
under 40 years-old

52%

of co-workers work for  
small businesses  
or start-ups

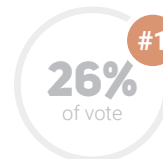
40%

of the workforce,  
by 2020, is expected to consist of  
entrepreneurs, freelancers,  
and other remote workers

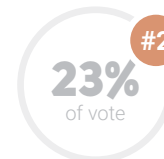
# KEY FINDINGS

The **Market Analysis** found that a variety of programmatic elements at the Woodhaven site can be supported by existing market conditions in the local and regional area. These findings suggest that the Woodhaven site has significant potential to be a live-play-work community, with amenities that support not only residents but employees and visitors as well. Here's a summary of what the site can support:

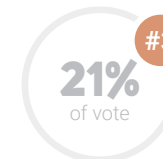
Here's what is most important to the public:



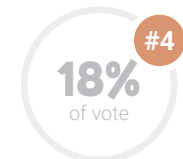
housing



retail, restaurant, or  
light commercial



trails, parks, +  
open space



sports complex



## LIVE

### Multi-family rental options.

1- and 2-bedroom units geared toward millennials

2- and 3-bedroom units geared toward empty-nesters

### Convenience retail amenities.

### Some single-family housing.

3- and 4-bedroom units geared toward empty-nesters



## PLAY

### Trail connections.

### Open space.

**Recreation or community facility.**  
with indoor sports complex

### Niche retail options.

farmers market, craft breweries, restaurants, bars



## WORK

**Co-working space or maker-space.**  
based on subscriber model

**Extended-stay hotel.**  
upscale, targeted at businesspeople



## APPENDIX

See Appendix C for the complete Market Analysis, prepared by the Williams Group.

# MASTER PLAN

# DEVELOPMENT OF MASTER PLAN



## CONCEPTUAL ALTERNATIVES

As part of the community engagement process, the project team developed three preliminary alternatives for the organization and type of development at the Woodhaven site. These alternatives were meant to be conceptual in nature only, more to encourage public discourse than to create rigid plans. The conceptual alternatives were presented to the public for discussion and feedback at Public Workshop #2.

## REFINED OPTIONS

Based on the feedback received from Public Meeting #2 as well as the results of the **Market Analysis** and the stakeholder interviews, the initial conceptual alternatives were refined into three, master plan options. These options were intended to be market-supportable such that each could be feasibly implemented at the site.

## PREFERRED MASTER PLAN

Master Plan Option C, as detailed on **page 42**, was best able to balance public input with market research and was therefore chosen as the preferred plan for the Woodhaven site. This plan was determined to be most representative of local conditions, while also holding true to the community's vision.



## APPENDIX

See Appendix D for an in-depth look at the new community envisioned by the master plan.



# CONCEPTUAL ALTERNATIVES

## CONCEPTUAL ALTERNATIVE #1

**Northern Portion of the Site.** This alternative places the elements supported by the **Market Analysis** – like the extended-stay hotel and mixed-use apartments – just off Floyd Avenue in order to strengthen the commercial nature of this corridor. A phased approach is recommended for the apartment buildings, beginning with those closest to Floyd Avenue and then moving closer to the center of the site. A “village green” is located between the two apartment buildings and aligned toward the river to draw people to the waterfront.

**Central Portion of the Site.** This portion of the site is primarily devoted to housing, with a townhouse development and a mixed-use development separated by another village green.

**Southern Portion of the Site.** The southern portion of the site includes small, cottage-style lots abutting the existing single-family residential neighborhoods to the west. An indoor sports complex is located adjacent to Rome Free Academy’s existing sports fields, and is buffered from the residential development by large, open practice fields.

**Trail Connections.** The site is ringed by a continuous, meandering trail that connects to each part of the development as well as to the Mohawk River Trail.





# CONCEPTUAL ALTERNATIVES

## CONCEPTUAL ALTERNATIVE #2

**Northern Portion of the Site.** This alternative treats the northern portion of the site as a standalone mixed-use development. The extended-stay hotel is positioned to front Floyd Avenue, as a means to encourage commercial development along this corridor. A small community center is located along the primary entrance into the site; its associated sports fields act as a green buffer between the entry road and the parking lots for the mixed-use buildings.

**Central Portion of the Site.** This portion of the site features a linear park in the power line easement. Single-family housing is located adjacent to the existing neighborhoods to the west, and garden-style apartments are located to the east. If supported by market conditions, this alternative recommends a spine of mixed-use or retail buildings as part of later phases of this development.

**Southern Portion of the Site.** This alternative includes a larger percentage of traditional single-family housing lots than recommended in the **Market Analysis**, with most being in the southern portion of the site. These single-family lots were included to retain the residential feel along Park Drive.

**Trail Connections.** This alternative also features an extensive trail network.



# CONCEPTUAL ALTERNATIVES

## CONCEPTUAL ALTERNATIVE #3

**Northern Portion of the Site.** This alternative focuses public- or visitor-oriented uses on the northern portion of the site, with a large community recreation center and an extended-stay hotel fronting Floyd Avenue. No vehicular or pedestrian connections are provided from the northern portion of the site to the central and southern portions as a means of keeping these areas more residential.

**Central Portion of the Site.** This portion of the site includes a large, dense townhouse development separated from the existing residential neighborhoods to the west by an urban forest buffer.

**Southern Portion of the Site.** This alternative is distinct from the others in that it includes a small mixed-use commercial core along Park Drive. South of this development is a large event space, which may include indoor or outdoor accommodations. If market conditions allow, this space could be developed for another use.

**Trail Connections.** This alternative does not include an internal trail network. It does, however, reforest and create a waterfront park to accentuate the existing Mohawk River Trail.





## REFINED OPTIONS

### MASTER PLAN OPTION A

**Northern Portion of the Site.** This plan separates the site into two distinct sections: mixed-use and recreation uses in the northern portion and residential uses in the central and southern portions. The mixed-use buildings proposed along Floyd Avenue could vary in use, but one is intended as an extended-stay hotel. These buildings are separated by a central open space which acts as a focal point for the northern site entrance. Adjacent to this open space is a large community recreation center. Its associated sports fields act as a transition from the existing wooded stand to the proposed recreation building.

**Central Portion of the Site.** This portion of the site is devoted to small-lot, single-family housing in a heavily forested subdivision. A wooded buffer is provided between this development and the surrounding homes.

**Southern Portion of the Site.** The southern portion of the site includes two types of senior housing: an apartment-style assisted living facility and cottage-style independent living homes. A mid-road park (similar to nearby Vogel Park) is proposed for Park Drive.

**Trail Connections.** No trail connections are included in this plan in order to keep the northern and southern portions of the site separate.





## REFINED OPTIONS

### MASTER PLAN OPTION B

**Northern Portion of the Site.** This option locates an extended-stay hotel along Floyd Avenue. The hotel and a few small, commercial buildings front an access road to the river, creating a small commercial corridor interior to the site. Some of the commercial buildings also have outdoor, semi-private patios on the river side. A community recreation center and sports fields are located south of this corridor.

**Central Portion of the Site.** Along the river in the central portion of the site, heavy reforestation is recommended to create an urban forest and to buffer the existing residential neighborhoods to the west. Townhomes are located between this urban forest and Park Drive.

**Southern Portion of the Site.** In this portion of the site, mixed-use commercial buildings are arrayed around the Park Drive mid-road park. Leading up to the park on either side, single-family lots are recommended to continue the residential feel of Park Drive. A reforested space buffers between Rome Free Academy and the interior of the site.

**Trail Connections.** This alternative includes an extensive trail network around the site and through the urban forest area. A riverfront park is also proposed off the Mohawk River Trail near Floyd Avenue.





## REFINED OPTIONS



### MASTER PLAN OPTION C

**Northern Portion of the Site.** This option fronts mixed-use buildings along Floyd Avenue and along the riverfront. Buildings along the river are intended to have first-floor commercial uses that engage with the river through outdoor dining spaces, patios, and overlooks. Townhomes and a community recreation center are located south of the mixed-use buildings.

**Central Portion of the Site.** This portion of the site includes small-lot, single-family housing that is consistent with the surrounding residential neighborhoods. Open or reforested space buffers this development on all sides. No vehicular connection is provided between this and the northern portion of the site, creating a distinction between this residential and that more commercial area.

**Southern Portion of the Site.** The southern portion of the site is devoted to senior housing, with an assisted living facility and associated independent living cottages. In this area, Park Drive is realigned around a mid-road park that serves as a focal point.

**Trail Connections.** An extension of the Mohawk River Trail traverses the open space in the power line easement, connecting the single-family housing development and the recreation center to the river.



# PREFERRED MASTER PLAN

Master Plan Option C was chosen as the preferred master plan because it best balances the desires of the community against existing market conditions, in turn providing the most practical and market-supportable combination of uses for the site.

Here's how different elements of Master Plan Option C align with the desires of the community:

## HOTEL

All the master plan options include an extended-stay hotel, but this option differentiates itself by fronting the hotel closest to the street and creating the most noticeable streetscape.

---

"We need more nice hotel spaces. When people come to town for hockey tournaments, they go to the casino to stay."

"The need for the extended stay hotel is supported by other independent market studies as well as the study associated with this project."

## HOUSING

Although single-family housing was not recommended by the **Market Analysis**, the public supported housing in the central portion of the site that was consistent with the suburban feel of the surrounding neighborhoods.

## SENIOR HOUSING

This option provides different types of senior housing, from assisted and independent living facilities to smaller single-family or low-maintenance options for downsizing seniors.

---

"Seniors are leaving the area because they don't have a choice for downsized living. This project should include housing for seniors."

"This is the perfect location for a 55+ community that is walkable, bikeable, and encourages socialization within the community."

## TRAILS, RIVER + OPEN SPACE

This option provides a good balance between open space and development. It also leverages the river and trail by creating riverfront commercial space and additional trail connections.

---

"I walk my dog on the site everyday. The power lines area should remain all natural."

"There should be a nature preserve along the waterfront."

## SPORTS COMPLEX

Like the others, this option includes a much-desired sports complex.

---

"I love the idea of a sports community center. We need an indoor complex with a track and basketball courts."



# PREFERRED MASTER PLAN

## NORTHERN PORTION OF THE SITE: MIXED-USE CAMPUS

This portion of the site will serve as the face of the newly revitalized Woodhaven site, welcoming people to shop, dine, and stay in Rome's version of an "urban burb" – where the density and activity of an urban area are combined with the open space and affordability of a suburb.

Multi-story, mixed-use buildings will front Floyd Avenue, strengthening the existing commercial corridor and creating an active streetscape where first-floor retail and dining options spill out onto the sidewalk. Higher-end apartment options will be available in these mixed-used buildings, and will be supplemented by townhome options as well. These buildings will be sited to maximize the interplay of humans and nature, which will be further enhanced by a new trail connections and riverfront amenities. Opportunities for organized recreation will also be available at the indoor/outdoor sports complex.

Living options in this portion of the site will be targeted at millennials who want the diverse social, retail, and housing options of living in a big city without the high prices, while the low-maintenance townhome options will be attractive to seniors. Visitor-oriented retail and recreation services in this area will also contribute to the active, urban burb feel.



### APARTMENTS

150, market-rate lofts  
higher-end, with lots of amenities



### RETAIL SPACE

37,000 square feet  
restaurant and convenience retail



### SPORTS COMPLEX

with fitness center +  
indoor/outdoor sports fields





**FLOYD AVENUE ENTRANCE**  
rendering of mixed-use buildings









**RIVERFRONT COMMERCIAL + RECREATION SPACE**  
rendering of commercial buildings and trail amenities





# PREFERRED MASTER PLAN

## CENTRAL PORTION OF THE SITE: SINGLE-FAMILY RESIDENTIAL

The central portion of the site provides small-lot, single-family housing that is consistent with the neighborhoods that surround this portion of the site. These homes are envisioned to be one-level ranch or cottage-style, with modern amenities and low-maintenance landscaping that will be attractive to downsizing seniors and young families. A buffer of open space is provided around this development where trail spurs will connect the neighborhood to the Mohawk River Trail.

Considering the constraints identified in the **Market Analysis** relative to single-family housing, the master plan allows for flexibility in this portion of the site. Depending on market demands, lots in this area could be subdivided or dedicated as open space.



### SINGLE-FAMILY HOMES

50 attached or detached homes  
small-lots, low-maintenance





## SINGLE-FAMILY HOMES

rendering of new residential neighborhood





# PREFERRED MASTER PLAN

## SOUTHERN PORTION OF THE SITE: MID-DENSITY CAMPUS

The southern portion of the site provides residential options at a higher-density than the single-family options in the central portion of the site. The master plan envisions this area as a senior living community that could be open to other residents in addition to seniors. In fact, millennials and seniors often want similar things when it comes to housing – low-maintenance properties with easy access to recreation and retail options in an active and social environment. Potential housing options could be assisted-living apartments as well as independent-living townhomes in a walkable layout.



### SENIOR HOUSING

assisted-living apartments  
independent-living townhomes

## BUFFER AREAS: TRAILS + OPEN SPACES

The master plan leverages the site's proximity to the Mohawk River and its existing wooded stand by creating a network of forested open spaces and trails. These open spaces are intended to act as a "greenbelt," creating a buffer between surrounding neighborhoods and providing areas to walk and bike along the Mohawk River Trail and newly-created trail spurs. The plan also enhances access to and views of the river by creating a viewing platform and a formal access point for kayakers and other non-motorized boats.



### TRAIL CONNECTIONS

new trail spurs throughout site  
improved walkability + bikeability



### NATURAL SPACES

better access to the riverfront  
network of forested open spaces





## OPEN SPACE

rendering of trail through urban forest area









## TRAIL + RIVER ENHANCEMENTS

rendering of improved access to and views of Mohawk River







# IMPLEMENTATION STRATEGY



## OVERVIEW

We don't want the Re-Think Woodhaven Revitalization Plan to sit on the shelf forever – we want to turn this plan into real-life, tangible action now! This **Implementation** section provides the link between the community's vision for the Woodhaven site and the actions necessary to see on-the-ground change as soon as feasibly possible.

These actions serve as concrete steps that the City and its partners can take to work towards the realization of the goals of this plan. The actions fall into three, overarching categories, as described below. Later in this section, the timeframe, responsible parties, and potential funding sources for each action are identified.

**“ WE DON'T WANT  
THIS PLAN TO SIT  
ON THE SHELF!”**



### ADMINISTRATIVE ACTIONS

Administrative actions are required to ensure that the implementation of this plan adheres to all local and state development regulations, including those related to environmental significance and zoning. These actions may also involve undertaking further studies.



### PHYSICAL ACTIONS

Physical actions have the most visible impacts, and affect the spatial layout and design of the future development. Such actions include reorienting roadways, creating trail linkages, supplying utility connections, and installing public art.



### COMMUNITY ACTIONS

Community actions are directed at the community, and are intended to keep the public updated on the status of the project. Other actions, like establishing a photo contest and organizing cleanup days, will encourage the community to engage with the site directly.

# ADMINISTRATIVE ACTIONS

## 01 **ASSESS ENVIRONMENTAL IMPACTS.**

As required by the New York State Environmental Quality Review Act (SEQR), the City must complete an Environmental Assessment Form to identify the potential environmental impacts of adopting the ReThink Woodhaven Revitalization Plan. The Common Council will serve as the Lead Agency for this action, and will determine whether there are significant environmental impacts that need to be addressed as a result of plan adoption. A positive declaration of significance may result in the preparation of an Environmental Impact Statement as well as a public hearing.

## 02 **ADOPT THE PLAN!**

To reaffirm the City's commitment to bettering the Woodhaven site and to officially recognize the preferred master plan as the community's vision for the site, we will formally adopt the ReThink Woodhaven Revitalization Plan as an appendix to our Comprehensive Plan.

## 03 **ADOPT THE FORM-BASED CODE.**

The land uses and development densities included in the preferred master plan are based on the Woodhaven Development District Form-Based Code that was created as part of this project. This new code rezones the site, and must be officially adopted so that the development prescribed in the preferred master plan can proceed in compliance with the City's ordinances.

## 04 **FILE A SUBDIVISION MAP.**

The preferred master plan creates new lots within the existing Woodhaven site parcels. Before the City can officially subdivide, sell, and redevelop these new lots, we must provide the County with a subdivision map that shows the intended layout of the site.

## 05 **MAKE CITY LAND PARKLAND.**

The preferred master plan calls for some existing City-owned land on the site to be maintained as open, park space. The Common Council should adopt a resolution to give this land formal parkland status, so that it can be freely enjoyed by all in our community.

### What is a Form-Based Zoning Code?



#### **Traditional Zoning**

This type of zoning focuses on where different land uses (like residential, commercial, and industrial) are located relative to each other.



#### **Form-Based Zoning**

This type of zoning focuses on the aesthetic appearance of buildings, streets, and open spaces, and provides specific design standards for these elements.

## ADMINISTRATIVE ACTIONS

### 06 PHASE THE DEVELOPMENT.

The City should identify its ideal phasing plan for the redevelopment of the Woodhaven site. As suggested by the **Market Analysis**, complete and immediate build-out of the entire site might overwhelm the local market, leading to leasing and other economic difficulties. Rather than building-out the entire site at once, the City should identify discrete phases in which development should occur – particularly in which single-family residential development should occur – and work with the chosen developer to see this plan through.

### 07 MARKET THE SITE.

To attract developers to and show them the potential of the Woodhaven site, the City should create a marketing strategy for the site. This strategy could include a website and related online presence, as well as sell sheets and other media. This action should precede the development of a Request for Proposals (RFP).

### 08 HOLD A DEVELOPER FORUM.

As part of the City's marketing strategy, a forum could be held to discuss the preferred master plan and solicit letters of interest from potential developers.

### 09 REQUEST PROPOSALS.

The City should distribute a Request for Proposals (RFP) to interested developers as identified through the developer forum. This RFP could also be marketed publicly on the City's website.

### 10 EVALUATE PROPOSALS.

Proposals received through the RFP should be reviewed and evaluated by a committee, and a recommendation for the preferred developer should be submitted to the Common Council.



## PHYSICAL ACTIONS

### 11 CONSIDER TAX INCENTIVES.

If it is determined that tax incentive financing is required for the development to move forward, the City could consider designating the site as a special taxing district, where a portion of future property tax revenues are diverted to help finance the development. Such incentives are useful in areas where redevelopment would not occur otherwise.

### 12 IDENTIFY CATALYST PROJECTS.

To spur interest in the redevelopment and help make the vision for the site more tangible to the public, the City should identify and publicize a series of catalytic projects. These projects could include:

- improving Riverside Park
- making Ellsworth Road a bicycle and pedestrian corridor
- creating a trail connection to RFA

### 13 ASSESS PUBLIC UTILITIES.

The Department of Public Works should be consulted to identify potential water, sewer, gas, and electric connections for development areas within the site, and to determine an engineer's estimate for the costs of new tie-ins.

### 14 CREATE THE SITE ENTRY ROAD.

The preferred master plan envisions the primary entrance to the Woodhaven site along Floyd Avenue, where street-front mixed-use buildings will create an active commercial corridor. To begin to effectuate the plan, the entrance to the site should be relocated to Floyd Avenue from the existing entrance along the more residential Park Drive.

### 15 ASSESS ROAD CONNECTIONS.

One of the intentions of the Woodhaven redevelopment is to repair the urban fabric in the surrounding area – to reconnect neighborhoods that have long been separated by the vacant development. To that end, additional connections to the existing roadway network should be considered, with potential links to Millbrook Road, Mayberry Road, Ellsworth Road, Herkimer Avenue, and Elm Street.

### Taxing + Financing Strategies

No development exists in a vacuum – it requires some kind of funding to get off the ground. While most of this funding will come from private developers, the City can attract developers to the site by offering taxing and financing incentives. The City should work with elected officials to assess options for creating new incentives for multi-family residential developments, and should also research the possibility of creating a Payment Incremental Financing (PIF) District.

Developers themselves can also leverage private grant and financing strategies to offset some of their costs. In addition to local and state grant opportunities, developers can take advantage of the financial incentives associated with capital investments in a federal Opportunity Zone (of which the Woodhaven site is designated).

## PHYSICAL ACTIONS

### 16 **ASSESS ELLSWORTH CONNECTION.**

The gate at Mobile Avenue that prevents vehicular traffic from accessing Rome Free Academy from Ellsworth Road limits connectivity to locations east of the site and forces traffic to Floyd Avenue. The Rome City School District should be consulted to determine the feasibility of removing this gate and allowing vehicular traffic to access the RFA campus from Ellsworth Road.

### 17 **CREATE A TRAIL CONNECTION.**

The preferred master plan recommends an eastward extension of the Mohawk River Trail connecting to Ellsworth Road beneath the power line easement. This trail could be fairly easily constructed, and would symbolize progress at the site even in the early stages of development.

### 18 **IMPLEMENT WAYFINDING.**

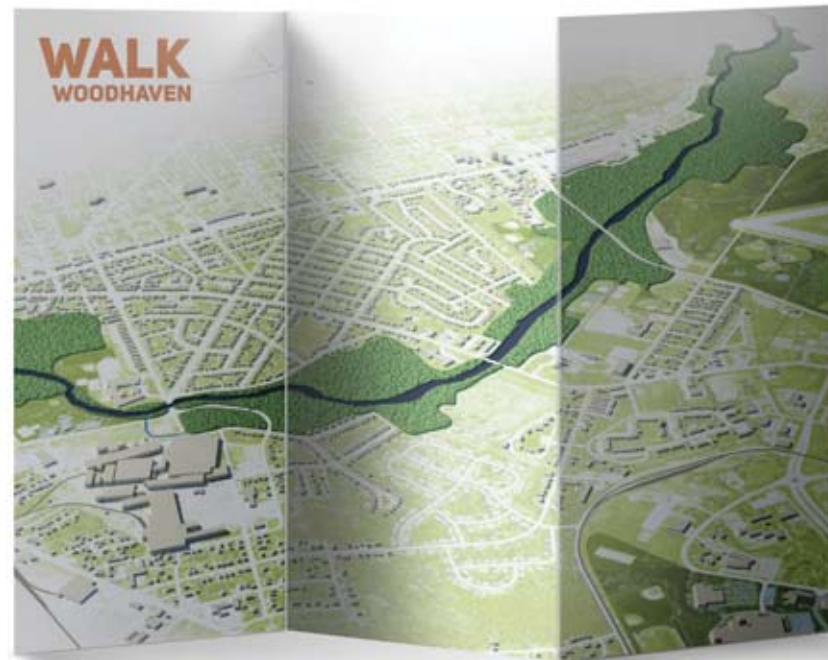
The Woodhaven redevelopment should implement road, trail, and destination signage that is consistent with the City of Rome's Wayfinding Strategy. It might also be possible to collaborate with Mohawk Valley Edge to create a trail map that promotes the Woodhaven site's network of trails and its connections to other trails in the area.

### 19 **CREATE THE PARK DRIVE PARK.**

The Park Drive Park, as recommended in the preferred master plan, will be a unique, identifying feature for the Woodhaven redevelopment. This park can be constructed prior to other development, and will serve to cultivate the refreshed reputation of the site.

### 20 **IMPLEMENT PUBLIC ART.**

As private projects at the site are developed, a complementary public arts program should be established to install artworks throughout the site. These pieces will act as placemaking features, and could also create synergies with the International Sculpture Garden at nearby Griffiss Business and Technology Park.





## COMMUNITY ACTIONS

### 21 GIVE THE SITE A NAME.

Is it Woodhaven? Is it Wright Manor? Woodhaven-Wright Manor? We need to give this site a name so that people can better understand and connect with the project. An identifiable name that encapsulates the community's vision for the site will also further the placemaking efforts included in the master plan.

### 22 ENGAGE ON SOCIAL MEDIA.

It is important to keep the community up-to-date on the status of redevelopment and to spread positive messages about the project through the City's various social media platforms. These platforms allow community members to access information and provide feedback in an easy and convenient manner.

### 23 ORGANIZE COMMUNITY EVENTS.

We want to reclaim the Woodhaven site in a new and more positive way. No longer should it be thought of as a place to avoid, but rather as a place to enjoy all the things that we love about Rome. Organizing community events – like bike rides, fitness classes, or cleanup days – could be one way to help the public become more comfortable with and encourage them to “take back” the site.

### 24 START A PHOTO CONTEST.

For the past few decades, the community has seen the Woodhaven site as an eyesore. The master plan works to create a new image of the site – one where people actually want to live, work, and visit. A photo contest could engage the community in cultivating this new image – both literally and figuratively. Such a contest could help the public see the site through new eyes, and create a sense of excitement over its future.

### 25 USE #311 REPORTING.

As redevelopment begins at the Woodhaven site, it will be important for the City to make sure that the site and any construction equipment is secure. The non-emergency reporting #311 hotline and mobile app should be used to allow citizens to report possible issues so that the City can respond in a timely manner.


**CHECK THE CITY  
OUT ON INSTAGRAM**

**@cityofromeny**



# IMPLEMENTATION TABLE

## ADMINISTRATIVE ACTIONS

ACTION + DESCRIPTION	TIMEFRAME	RESPONSIBLE PARTIES	FUNDING SOURCES
<b>Assess Environmental Impacts.</b> Complete the SEQR EAF to determine environmental significance of adopting the plan.	6 months to 1 year	Common Council	City
<b>Adopt the Plan.</b> Officially adopt the ReThink Woodhaven Revitalization Plan as an appendix to the City's Comprehensive Plan.   <b>HIGH PRIORITY ACTION</b>	as soon as possible	Common Council	City
<b>Adopt the Form-Based Code.</b> Rezone the site according to the Woodhaven Development District Form-Based Code.	as soon as possible	Common Council, Zoning Board of Appeals	City
<b>File a Subdivision Map.</b> Submit a subdivision map to the County showing the new lot lines for the site.	6 months to 1 year	Zoning Board of Appeals, Oneida County Department of Planning	City
<b>Make City Land Parkland.</b> Give formal parkland status to City-owned land on the site that the plan identifies as open space.	6 months to 1 year	Common Council	City


# IMPLEMENTATION TABLE

## ADMINISTRATIVE ACTIONS


ACTION + DESCRIPTION	TIMEFRAME	RESPONSIBLE PARTIES	FUNDING SOURCES
<b>Phase the Development.</b> Create a phasing plan to incrementally build-out the site.	1 year to 2 years	Department of Community and Economic Development	City
<b>Market the Site.</b> Create a marketing strategy to promote the Woodhaven redevelopment site to developers.	as soon as possible	Department of Community and Economic Development, Mohawk Valley EDGE	City, Mohawk Valley EDGE
<b>Hold a Developer Forum.</b> Spur interest in the site by holding a forum for developers.	1 year to 2 years	Department of Community and Economic Development	City
<b>Request Proposals.</b> Distribute a RFP to interested developers.  <b>HIGH PRIORITY ACTION</b>	1 year to 2 years	Department of Community and Economic Development	City
<b>Evaluate Proposals.</b> Review proposals and choose preferred developer.	1 year to 2 years	Evaluation Committee, Common Council	City
<b>Consider Tax Incentives.</b> Research tax incentive district financing for the site.	1 year to 2 years	Department of Community and Economic Development	City



# IMPLEMENTATION TABLE


PHYSICAL ACTIONS	ACTION + DESCRIPTION	TIMEFRAME	RESPONSIBLE PARTIES	FUNDING SOURCES
	<b>Identify Catalyst Projects.</b> Outline major projects that the City can complete to progress redevelopment at the site.   <b>HIGH PRIORITY ACTION</b>	6 months to 1 year	Department of Community and Economic Development	City
	<b>Assess Public Utilities.</b> Identify the most feasible connections to existing utilities and estimate costs for new tie-ins.	1 year to 2 years	Department of Public Works	City, National Grid Urban Center/Commercial District Revitalization Grant Program
	<b>Create the Site Entry Road.</b> Relocate the primary site entrance to Floyd Avenue from Park Drive.	1 year to 2 years	Department of Public Works	City, National Grid Urban Center/Commercial District Revitalization Grant Program
	<b>Assess Road Conditions.</b> Consider additional connections to existing roads in neighborhoods adjacent to the site.	1 year to 2 years	Department of Public Works	City
	<b>Assess Ellsworth Connection.</b> Determine feasibility of a vehicular and pedestrian connection between Ellsworth and Mobile.	1 year to 2 years	Department of Public Works, Rome City School District	City

# IMPLEMENTATION TABLE

PHYSICAL ACTIONS	ACTION + DESCRIPTION	TIMEFRAME	RESPONSIBLE PARTIES	FUNDING SOURCES
	<b>Create a Trail Connection.</b> Construct an eastward extension of the Mohawk River Trail as a linkage to Ellsworth Road.   <b>HIGH PRIORITY ACTION</b>	1 year to 2 years	Department of Parks & Recreation, Department of Public Works	City, Federal Recreational Trails Program
	<b>Implement Wayfinding.</b> Follow the City's Wayfinding Strategy for signage at the site. Work with EDGE to create a map for trails at the site and in the surrounding area.	3+ years	Department of Public Works, Mohawk Valley EDGE	City, Mohawk Valley EDGE
	<b>Create the Park Drive Park.</b> Realign Park Drive to allow for a circular park in the center of the road.	3+ years	Department of Parks & Recreation, Department of Public Works	City, Environmental Protection Fund Grant Program for Parks, Preservation, and Heritage
	<b>Implement Public Art.</b> Develop a site-wide public arts program to encourage the installation of art pieces in step with private development.	3+ years	Department of Public Works, Sculpture Space, local artists	City, NYS Council on the Arts, Sculpture Space

# IMPLEMENTATION TABLE

## COMMUNITY ACTIONS

ACTION + DESCRIPTION	TIMEFRAME	RESPONSIBLE PARTIES	FUNDING SOURCES
<b>Give the Site a Name.</b> Come up with and publicize an identifiable name for the redevelopment site.   <b>HIGH PRIORITY ACTION</b>	as soon as possible	Department of Community and Economic Development, Mayor's Office	City
<b>Engage on Social Media.</b> Provide regular and engaging updates about the project through the City's social media platforms.	ongoing	Department of Community and Economic Development	City, Mohawk Valley EDGE, Market New York Program
<b>Organize Community Events.</b> Create and hold frequent community events (bike ride, fitness classes, cleanup days) at the site.	6 months to 1 year	Department of Community and Economic Development, Positively Rome	City, Positively Rome
<b>Start a Photo Contest.</b> Promote a city-wide, social media-based contest to see who can take the best picture of the site.	6 months to 1 year	Department of Community and Economic Development, partner with local photographers	City
<b>Use #311 Reporting.</b> Allow citizens to use the #311 system to report issues at the site, and follow-up on these reports.	ongoing	Department of Public Works	City







# **APPENDIX A**

## **COMMUNITY ENGAGEMENT MATERIALS**



# C.T. MALE ASSOCIATES

Engineering, Surveying, Architecture & Landscape Architecture, D.P.C.

50 Century Hill Drive, Latham, NY 12110  
518.786.7400 FAX 518.786.7299 www.ctmale.com



## Public Meeting 1 Question & Answer Exercise Summary

On February 9, 2017 the project team hosted two public meetings seeking input on the Revitalization of Woodhaven / Riverwalk project. Two exercises were completed with the public during those meetings: Question & Answer (Q&A), and Mapping. The two public meetings were divided into two groups for the Q&A exercise, four groups in total. Below is the compilation of the groups responses received during the Question & Answer Exercises.

### 1. What does the revitalization of Woodhaven mean to you in one word?

Money  
Aesthetics  
Change  
Future  
Green  
Growth  
Hope (3)  
Housing  
Important  
Income  
Life  
New construction  
Opportunity (4)  
Optimism  
Possibility  
Progress (5)  
Rebirth  
Refreshing  
Revitalization Floyd Ave  
Safety  
Second chance  
Small/tiny homes  
Tax base (2)  
Tax revenue  
Vibrate  
Vitality (2)

# C.T. MALE ASSOCIATES

Meeting Date February 9, 2017  
Rethink Woodhaven  
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## **2 What existing resources should be leveraged in the revitalization of Woodhaven?**

Access

Adjacent college facilities

Airport (3)

Arts and community center theater

Business – generate employees

Business and tech park employees

Business park

Central location – Highway, airport

Central location within city

Close to Thruway/lake

Cycling!!!

Delta lake (2)

Drones

Entertainment

Erie canal (2)

Fort Stanwick

GBTP

Golfers

Green space public parks (3)

Griffiss

High school (2)

History (2)

Hospital

Hotels

Infrastructure

Mohawk River (3)

Mohawk River Trail (2)

Moose valley

MRT

MVCC (4)

Nano center

Oneida airport

Proximity to a city schools

Regional center

RFA (2)

School

Sculpture/art walk / trails (2)

Shopping centers

Ski resort

## C.T. MALE ASSOCIATES

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Snowmobile trails – no linkage

Softball/baseball golf

Talent base

Tech park (2)

Tourism

Trail (3)

Train

Turning stone

VA clinic



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## **3 What is Rome missing?**

Accessible property

Activities

Activities for teens

Adequate housing

Better hygiene/maintenance

Better image of school system how it is perceived

Better infrastructure

Better Roads

Business Incentives

Campus like business Park

Charming downtown

Choices in shopping

College and youth activities and places - hang out space

Commercial airline

Commercial airlines at Griffiss

Community centers / meeting space (2)

Conference center

Convention center /space (2)

Designated business District – sprawl

Destination attractions

Entertainment walking distance services

Festivals/events

Greater connection / persons Base Rome

Hangouts activities for special needs - better accessibility

Happy people

Help with restoring older homes

Housing geared to young

Housing inventory

Hydroelectric water tubing

Indoor sports center – outdoor too / Indoor sports complex (2)

Indoor sports, such as soccer disc golf

Jobs (2)

Local destination bedroom community

Lower taxes

More doctors

More national brands

More tax base

Need more young people to stay

New housing 50 to 200,000

Outdoor entertainment venue

# C.T. MALE ASSOCIATES

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Public drinking fountain  
Public transportation (other than the buses)  
Reduced taxes  
Responsibility for property maintenance  
Restaurant / Food (2)  
Retail  
Self contained developments  
Senior living/center  
Sensors at stop lights  
Shopping centers  
Sidewalks  
Signage program  
Special needs/VA housing  
Sports complex (ice)  
Sports Pavilion  
Student housing  
Transportation improvements  
Turn key housing older - less maintenance  
Turn key housing young people  
Turn key living  
Uber (2)  
Upscale rentals  
Variety of restaurants  
Waterpark/marina  
Whole Foods  
Youth

# C.T. MALE ASSOCIATES

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## **4 When you travel to other locations and see successful revitalization or waterfront projects that are appealing to you, what is it that you see as successful? What do you like? What community what is it?**

Access (traffic flow) interconnectivity

Aesthetic Landscaping

Alex Bay New York restaurants at fractions

Alexandria Louisiana maintained housing

Baldwinsville New York docking amphitheater events activity economical

Battery Park

Boulder - pedestrian mall

Buffalo canal development mixed use

Buffalo New York – connections to water

Burlington – on interrupted waterfront

Charlottesville South Carolina history retail diversity

Charlottesville VA - enclosed nice neighborhood with cross streets pedestrian mall

Chattanooga Tennessee parks entertainment pedestrian access retail recreation

Clifton Park - Sports Fields – Center

Connection of business – school - hospital

Denver - walking park – green

Easton Pennsylvania Central Square near college architecture

Franklin Tennessee - Streetscape and events

Ft Myers eat, drink, arts all in downtown

Greenville North Carolina integrated plan mix redevelopment keep character

Greenville South Carolina health oriented modern capitalize river

Ithaca common space

Jones beach live entertainment

Little Falls – homey, history

Lockport integration with canal history

Miami - Baltimore – continuing -architecture – lights – aesthetics

Mixed use

Museum, underground utilities

New Paltz – public art – common

Oswego – connections to business/act from water

Pawtucket Rhode Island arts District

Pawtucket Rhode Island factory arts District and incubator bedroom community  
previous sister city

Pittsburgh Pennsylvania walkable boat access sports

Pittsford New York - restaurants and shops

Portland Maine retail at waterfront restaurant bike friendly

Promenade



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Public art – New Paltz

Retail – restaurants

Rome– New Hartford renewable energy

RV park

Saint Augustine Florida leverage history

San Antonio Texas - Riverwalk restaurant, boats, hotels

San Antonio waterfront as "front yard" for business and public

Small shops

Syracuse – old mills into apartments

Toronto – districts – brewery - reuse of material – history – art

Troy New York

Up port New York retail (Jeff Station)

Village feel – peddlers village New Hope Pennsylvania

Walkable with balance

Waterfront housing

Williamsburg Massachusetts - identity/theme

# C.T. MALE ASSOCIATES

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## **5 What is the City of Rome missing economically? (i.e. business types, basic services, etc.)**

Access to commerce impacted by bridge taxes  
Attractions for young adults /millennials  
Be very mindful of big box development - standards- parking  
Bring people from Utica (something Utica doesn't have)  
Business  
Charming village feel please keep it classy  
City too sprawled out  
Coffee shops  
Commercial airlines  
Craft shops  
Critical mass - don't pull from downtown  
Destination  
Discounts  
Downtown hotels  
Equestrian center  
Exciting – but makes sense  
Family amenities  
Fiber optic access, high-speed  
Four season attraction  
Historical  
Increase population (employees at Griffiss)  
Indoor water park  
Infill development in downtown  
Large recreational draw sports rock climbing  
Leverage Griffiss workers  
Marketing (2)  
Marketing brands  
Mix use to stimulate pedestrian traffic  
Modern probably transportation  
More trails  
Motocross  
National brands  
New Orleans St, Charles trolley corridor  
No box stores!!!  
No retail NO Price Chopper  
Not once a year  
Not used car dealers  
Outlet mall  
Parking

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Pediatric hospital

Polo equestrian

Public transportation not buses

Quality shopping district

Residential/housing

Shop in Rome

Sidewalk day on Main Street

Something new to Rome

Something that will last

Sports teams

Stainable tax base

Strong commercial corridor

Target group of users

Transportation canal to fort/downtown

Urgent care

Variety of restaurants

Venues, events such as concerts, farmers market, antique week, flea market

Visitor shops



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## **6 What do you see as recreational or community needs for the City of Rome**

Access difficult  
Add to the bike trail  
Agri-tourism  
Better bike access also in winter  
Cafe with live music and forestry  
Community center  
Connecting the snowmobile trails  
Drive-in movie  
Electric bikes  
Enough parks but not enough amenities within the parks  
Equestrian center  
Expansion of trail - Connect to Griffiss  
Fairgrounds  
Indoor sportsplex and outdoor (2)  
Expand DeLutis Field  
Marketing places and events – social media  
Modern parks  
More trails  
More turf fields  
Outdoor performance space  
Parks are a great  
Places of refuge on trail/pavilion  
Senior activities  
Splash park  
Sports Center/facility (2)  
Teen activities, commerce  
Teen space, recreation center  
Updating – bowling  
We are a rural small town - don't use it then turn your backs  
Youth center or activities



## Public Meeting 1 Mapping Exercise Summary

On February 9, 2017 the project team hosted two public meetings seeking input on the Revitalization of Woodhaven / Riverwalk project. Two exercises were completed with the public during those meetings: Question & Answer (Q&A), and Mapping. The two public meetings were divided into eight groups. The members of the public were given markers and pens and drew and wrote what they would like to see on the site. A summary of each group's map is as follows:

### MAP #1

The vision developed at the first table was clearly included two program elements: housing and parks, trails and pedestrian amenities. Predominantly public open space, the group desired a vast public open space with trails and pedestrian amenities on the water. The group identified areas across the site for housing that addressed current market demands.

### MAP #2

Table 2 divided the project site evenly into quarters. 25% of the site was envisioned as being dedicated to housing, 25% to Parks and trails, 25% to a recreational center or sports complex and 25% to supporting services in the form of retail, restaurants or bars.

### MAP #3

Map #3 places a large importance on recreation. 35% of the site is dedicated to sports and recreation. This group envisioned a sports complex with indoor and outdoor amenities for all season use. Housing, although present, represented the smallest percentage of the site. The remainder of the site was split evenly between parks, trails and open space and retail/restaurant/pub uses.

### MAP #4

The sports complex component was an important element with group #4. This group dedicated half of the project site to recreational or sports activities/ facilities such as an indoor/outdoor water park, climbing walls, sports fields, and an equestrian center to name a few. Housing was also provided prominence dedicating area to various housing types. The remainder of the site was dedicated to mixed use light commercial to compliment the housing and sports related uses on site.

### MAP #5

Map #5 again placed a large importance on housing with 50% of the site being dedicated to this use. Members of the public at this table envisioned providing a balanced mix of housing for seniors, veterans, low-income families and high end row houses. Due to the site's proximity to Mohawk Valley Community College the table thought student amenities, retail

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and even a commercial market space would help support the site and should occupy 25% of property. Trails and green space made up the rest of the site.

## MAP #6

Similar to other groups, housing was a prominent element to this group's site. Senior, Retiree, veteran and young professional were housing types that were mentioned as desired for this location. About one-quarter of the site was reserved for Trails, recreation and open space and retail. With a desire to create a regional draw and provide recreation services to the local community a portion of the site was recommended to house a recreational center.

## MAP #7

This table split the site into 4 main uses and divided them across the site. 25% of the site was dedicated to Housing, 25% of the site was imagined as trails and open space, 25% of the site was recommended for retail and commercial, and the remaining 25% was left for an indoor sports field complex. The housing component, once again, was envisioned as multi-faceted. The desire of this table was to provide for accommodations for young professionals, seniors and people looking for assisted living opportunities.

## MAP #8

The final map also saw the site evenly divided into 4 uses. Housing and trails/ open space receiving 25% of the land allocation. A mix of retail and commercial also received 25%, while an indoor outdoor drone facility received the remaining 25% of the land allocation. The members of the public felt this was a complimentary use considering the proximity of the site to the State invested unmanned aircraft testing corridor running 50 miles west from the Griffiss International Airport.



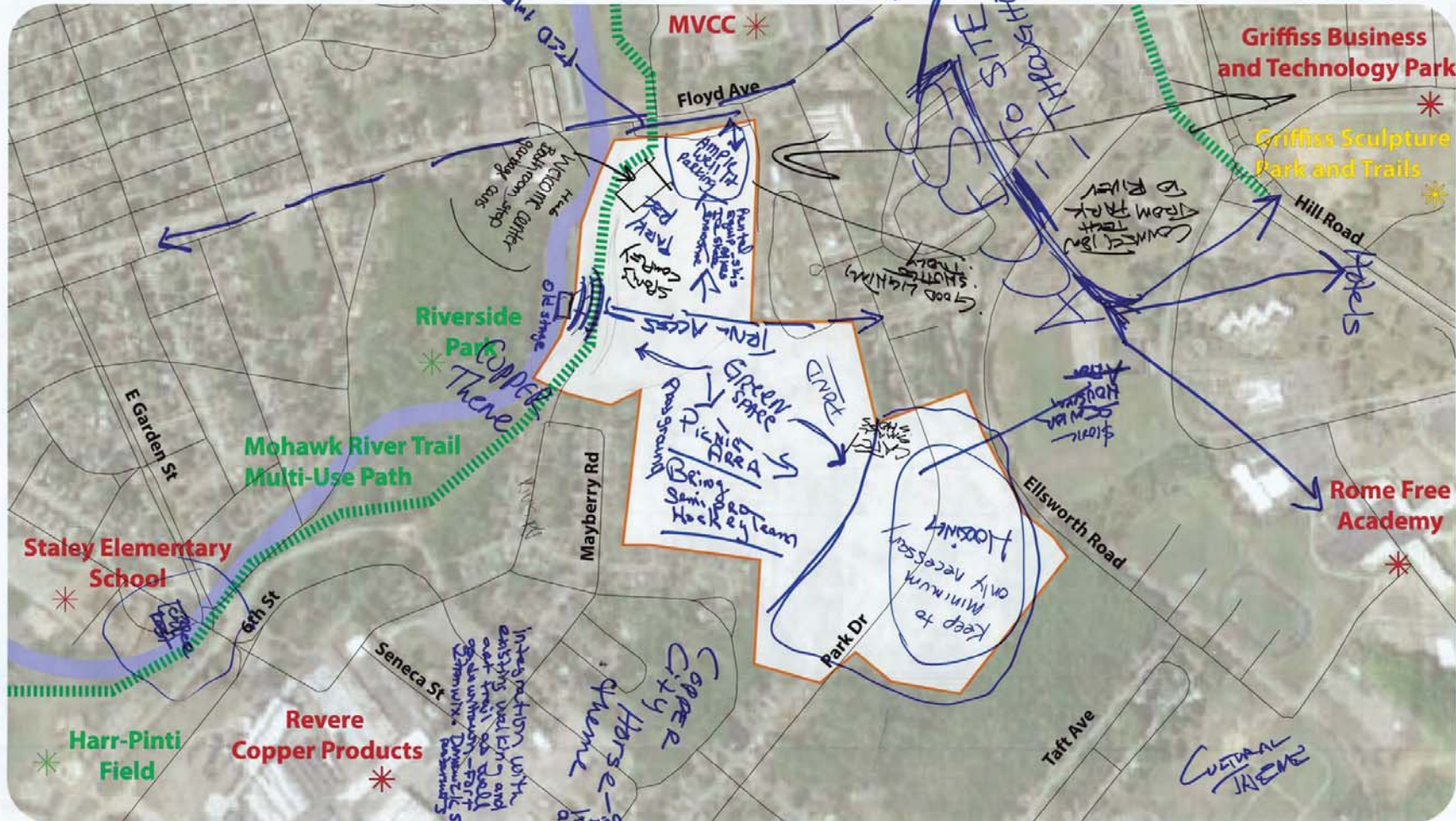
# Rethink



# Woodhaven

NO BUSINESSES ON S. 112  
BY SMALL BUSINESSES DON'T STICK AROUND

\* MAKE IT ALL A PARK  
ON THE PARK  
BUSINESSES





ROME NY  
the copper city

Gold

Need call

en

COOK  
MINTING

HIGH END  
MOROCAN

LAST  
MIXED  
PANNED

APPROXIMATE - MID RANGE  
\$130-175

DOWNSIZE FOR OVER 1000  
community

Office Business



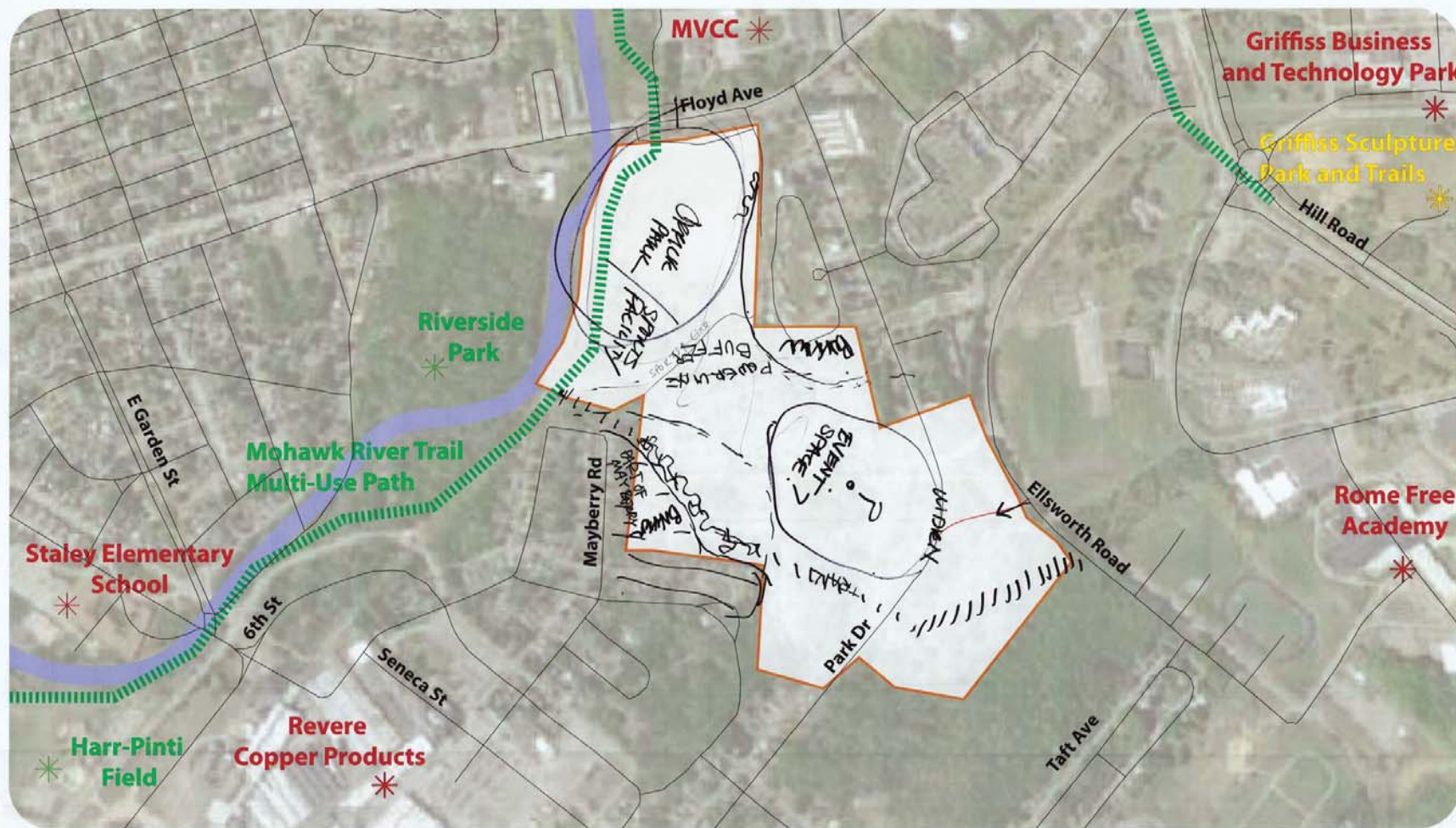


Metrick Rd  
Hodges Blvd  
Apartments

# Rethink



# Woodhaven



[www.rethinkwoodhaven.com](http://www.rethinkwoodhaven.com)

[email:rethinkwoodhaven@ctmale.com](mailto:rethinkwoodhaven@ctmale.com)

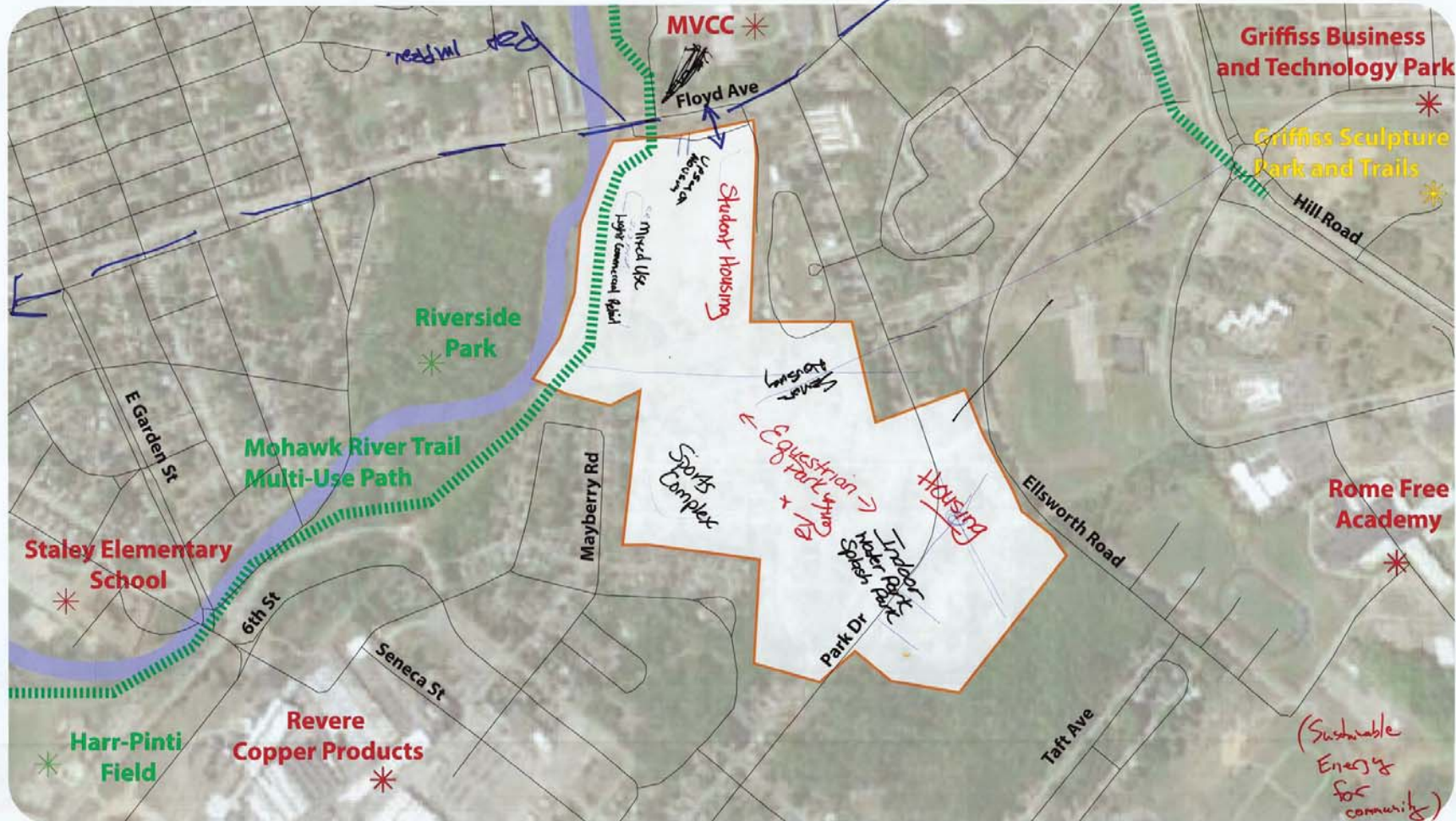
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Planning • Consulting • Construction



# Rethink



# Woodhaven



[www.rethinkwoodhaven.com](http://www.rethinkwoodhaven.com)

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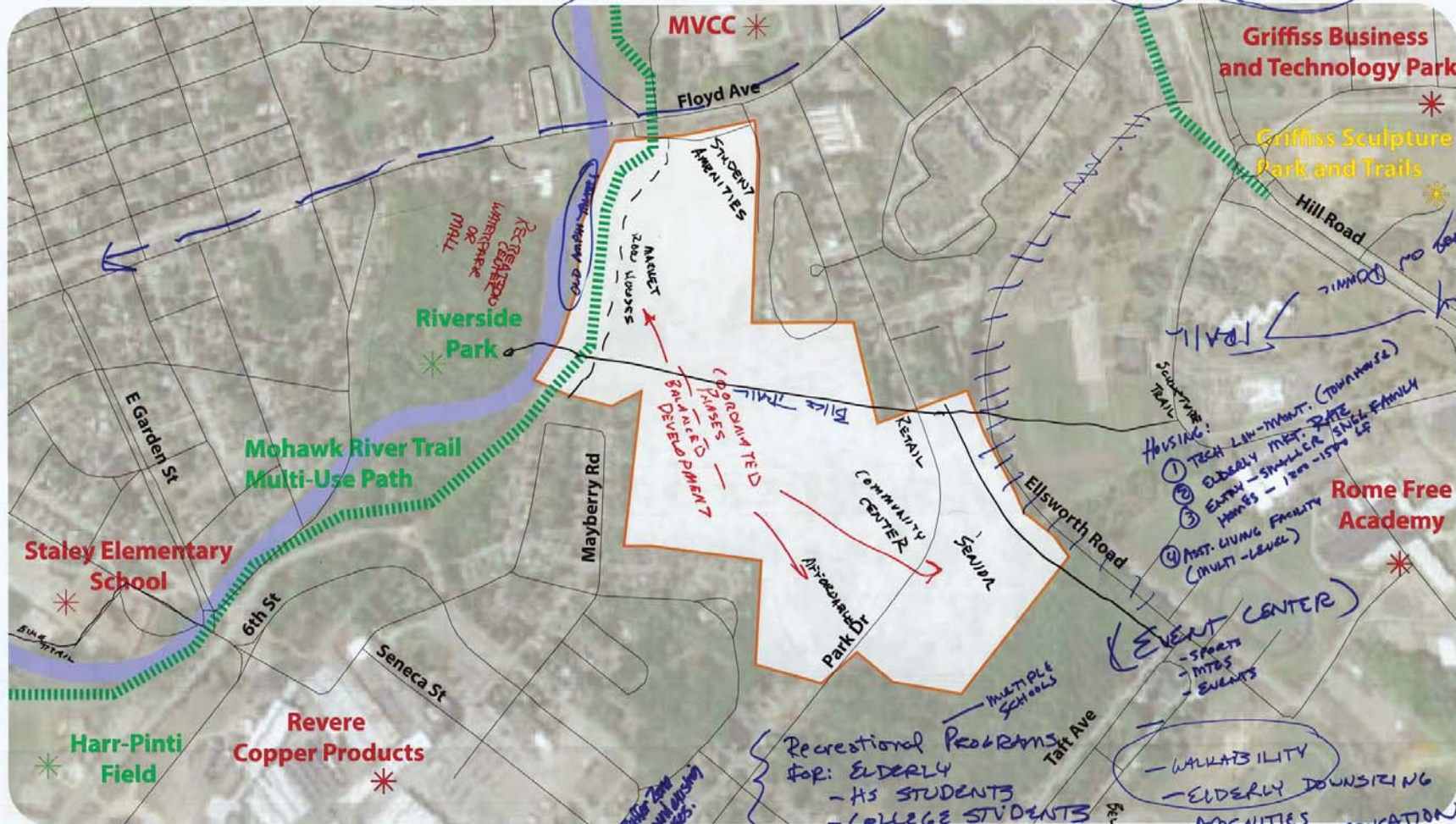
C.T. MALE ASSOCIATES  
Sustainable Community Development



# Rethink

ROME  
the copper city

# Woodhaven



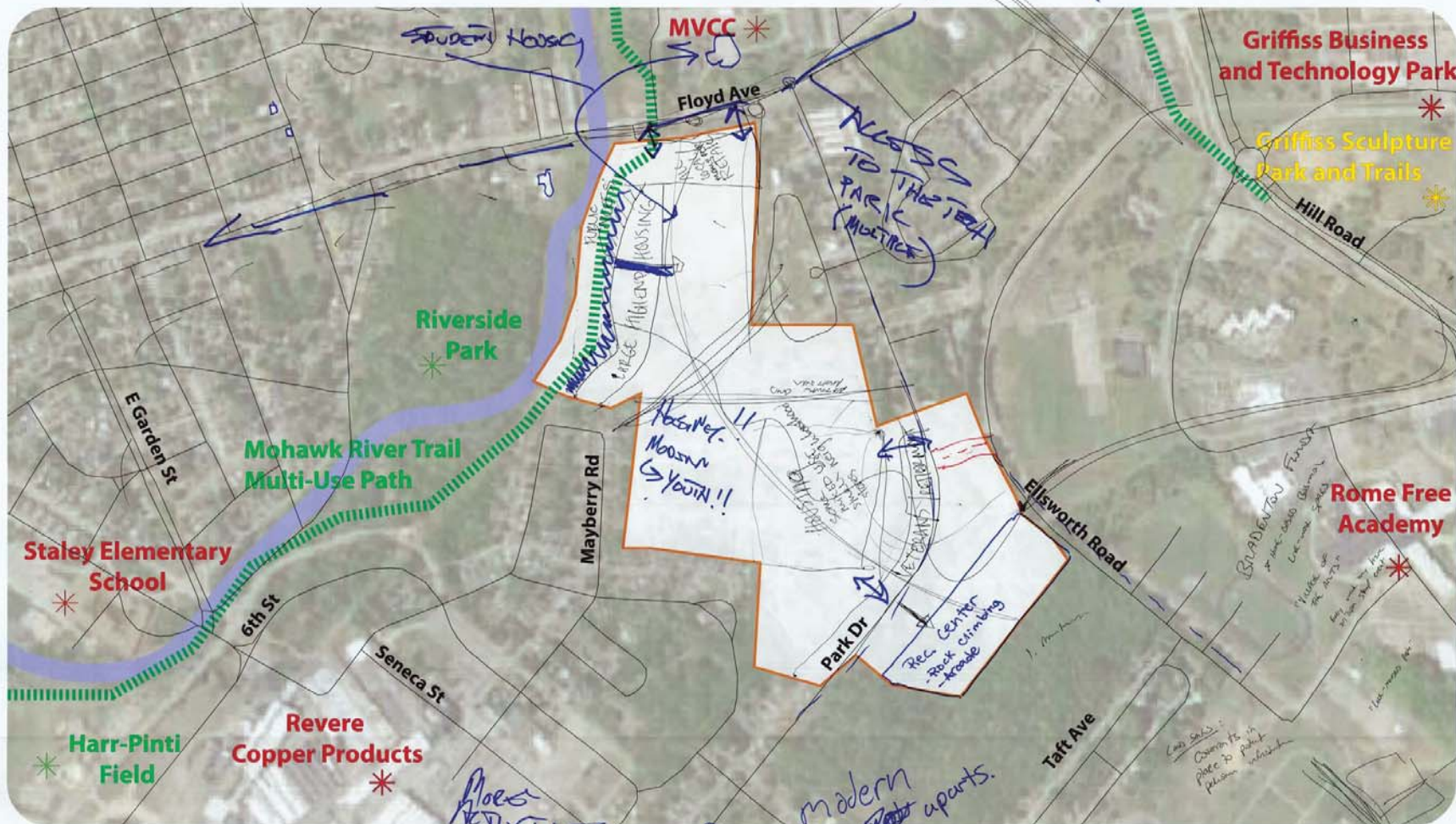
www.rethinkwoodhaven.com

email:rethinkwoodhaven@ctmale.com

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# Woodhaven

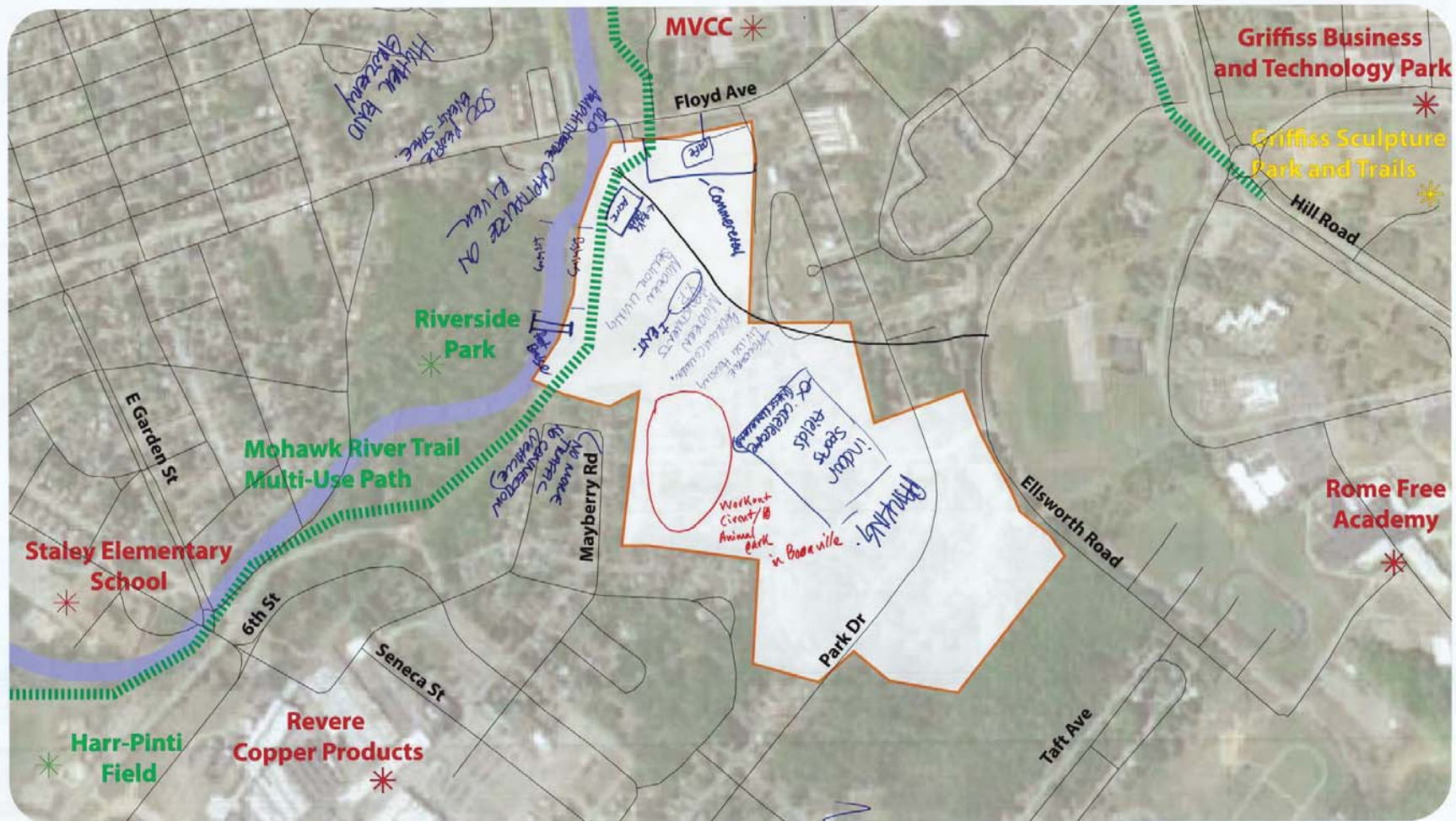




# Rethink



# Woodhaven



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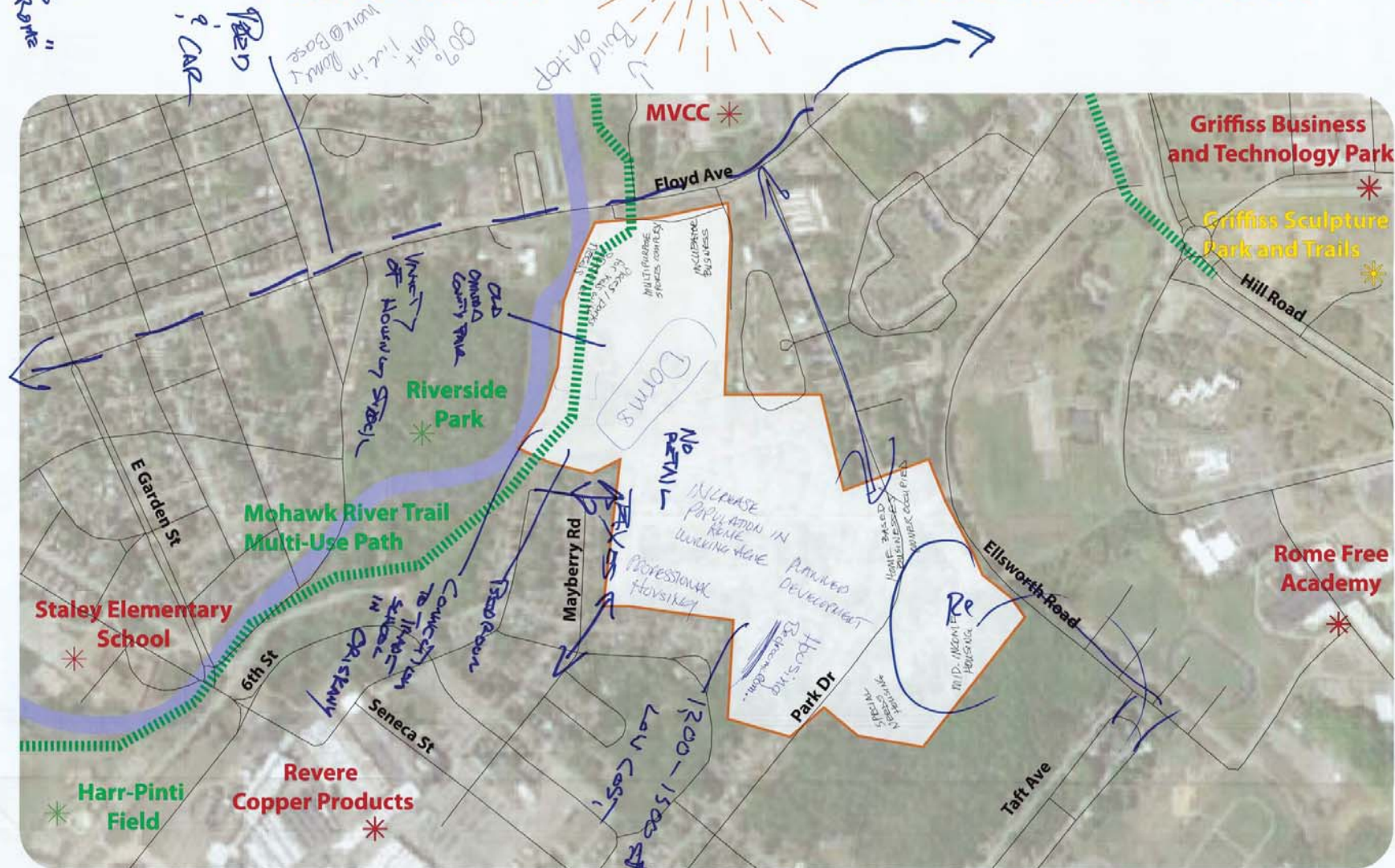


# Rethink NY ROME

the copper city

*the copper city*

# Woodhaven



NO DATA ON BUSINESSES IN RANGE

[www.rethinkwoodhaven.com](http://www.rethinkwoodhaven.com)

email:rethinkwoodhaven@ctmale.com

# PUBLIC INPUT MEETING #2



City of Rome – RETHINK WOODHAVEN



## Agenda:

- Overview of Inventory & Analysis (Chapter on website)
  - Environmental Features Map
  - Land Use Map
  - Zoning
  - Site Analysis
- Summary of Public Input and Meeting #1
  - Meeting #1
  - Web-based Input
- Overview of Market Analysis & Developer Input
- Concept Review
  - Option 1
  - Option 2
  - Option 3
  - Public Comment








# Inventory & Analysis Overview

## Environmental Features

### LEGEND

-  Project Site
-  DEC Wetlands
-  NWI Wetlands
-  Mohawk River
-  Oneida County Tax Parcels (2014)

### Soil Types (USDA)

-  33A: Alton-Urban land complex, 0 to 3 percent slopes
-  350A: Alton gravelly loam, 0 to 3 percent slopes
-  4: Wakeville silt loam, occasionally flooded
-  7: Wayland soils complex, 0 to 3 percent slopes, frequently flooded
-  W: Water

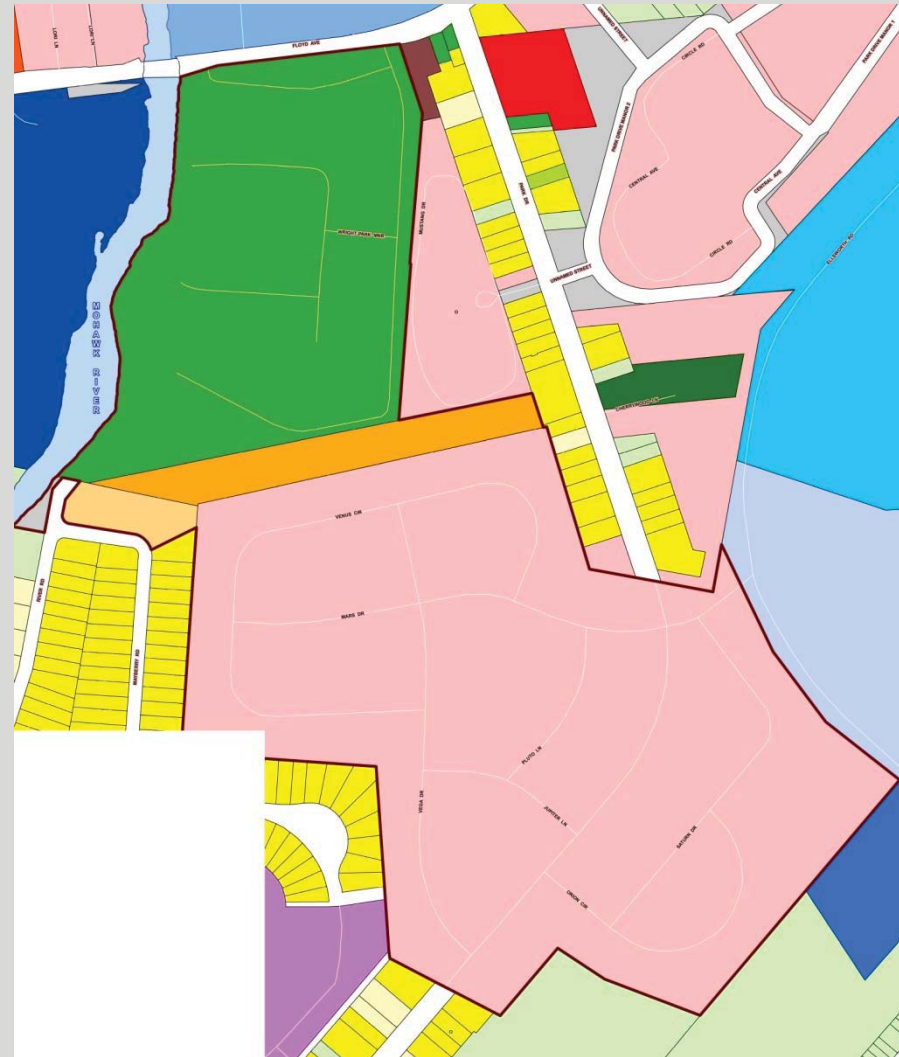
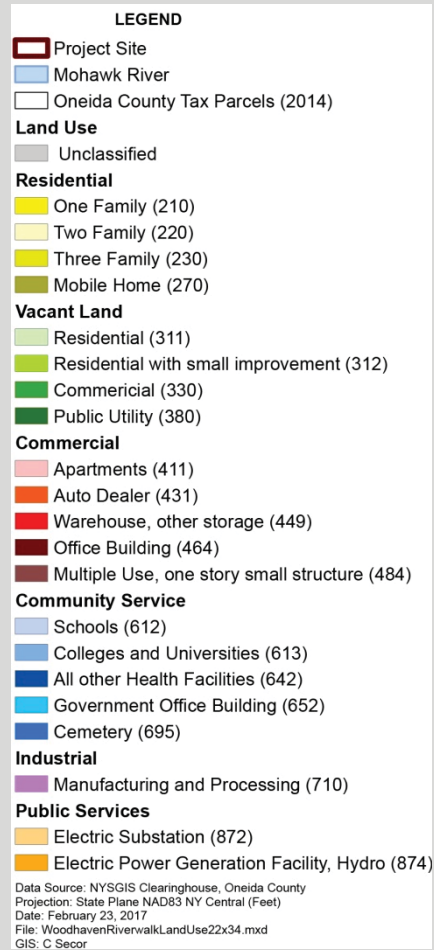
Data Source: NYSGIS Clearinghouse, Oneida County, USDA, NWI, DEC  
Projection: State Plane NAD83 NY Central (Feet)  
Date: February 23, 2017  
File: WoodhavenRiverwalkEnvFeatures22x34.mxd  
GIS: C Secor



City of Rome — RETHINK WOODHAVEN

# Inventory & Analysis Overview

## Existing Land Use

















City of Rome — RETHINK WOODHAVEN



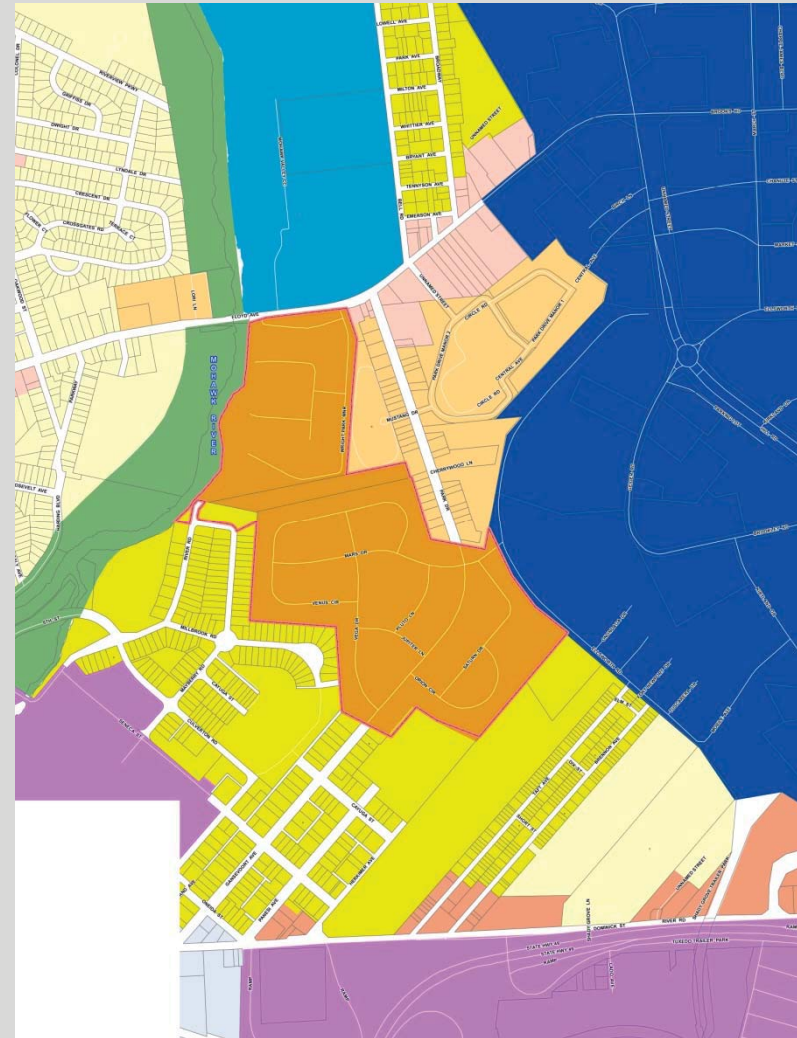
# Inventory & Analysis Overview

## Proposed & Existing Zoning

### LEGEND

-  Project Site
-  Oneida County Tax Parcels (2014)
- Proposed & Existing Zoning**
-  C-1 Local Commercial
-  C-2 General Commercial
-  GB Griffiss Base
-  I Institutional Campus
-  I-G General Industrial
-  NA Natural Areas
-  NR Neighborhood Redevelopment
-  R-1 Single-Family Residential
-  R-1 Single-Family Residential
-  R-2 Single-Family Residential
-  R-3 Multi-Family Residential
-  W Waterfront

Data Source: NYSGIS Clearinghouse, City of Rome  
Projection: State Plane NAD83 NY Central (Feet)  
Date: February 23, 2017  
File: WoodhavenRiverwalkZoning22x34.mxd  
GIS: C Secor



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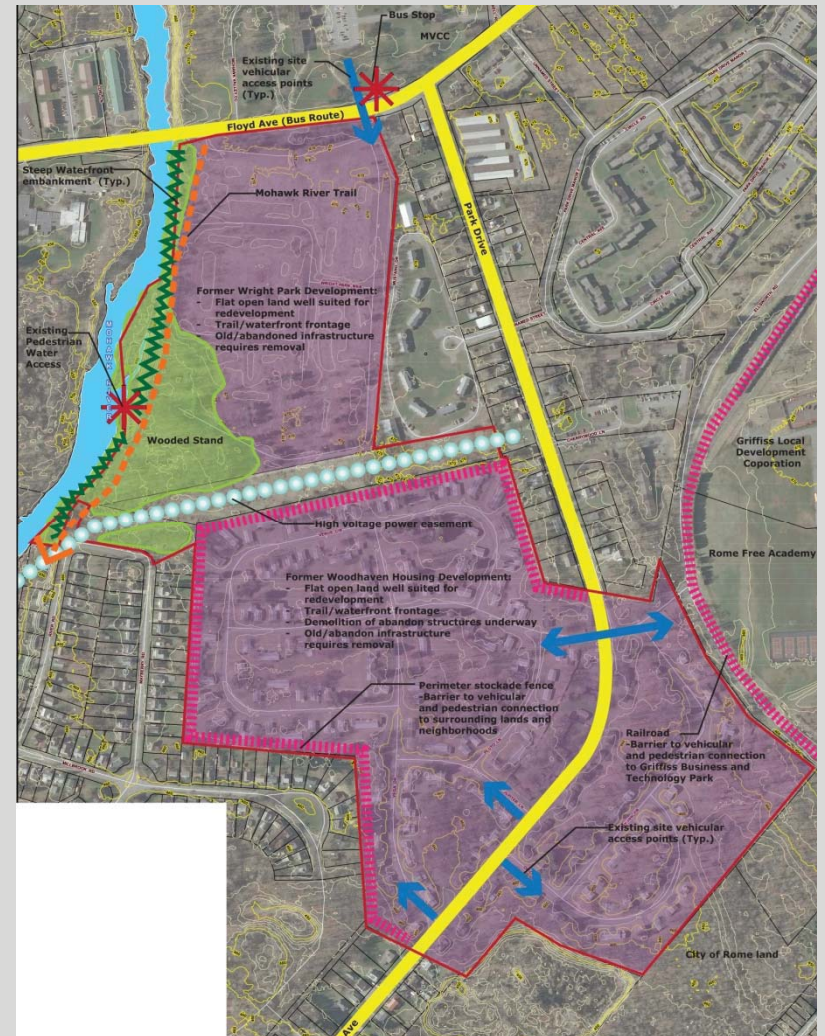
# Inventory & Analysis Overview

## Site Analysis

### LEGEND

-  **Property Boundary**
-  **Tax Parcels (2014)**
-  **Major Roads**
-  **Power Easement**
-  **Existing Site Access**
-  **Wooded Stand**
-  **Previously Developed Land**
-  **Mohawk River Trail**
-  **Steep Slopes**
-  **Points of Interest**
-  **Barriers to Development**

Data Source: NYSGIS Clearinghouse, Oneida County  
Projection: State Plane NAD83 NY Central (Feet)  
Date: March 02, 2017  
File: WoodhavenRiverwalkSiteAnalysis22x34.mxd  
GIS: C Secor, Drafter: R Berry

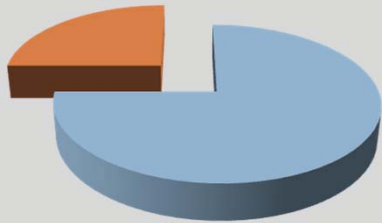


## City of Rome — RETHINK WOODHAVEN

# Meeting #1 Summary

## Group Comments from 2/9/2017

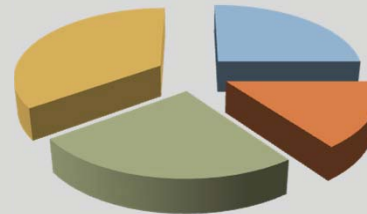
**Group #1**



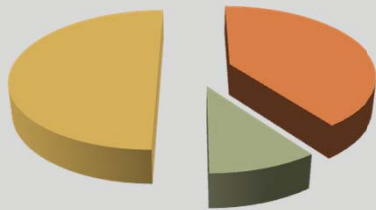
**Group #2**



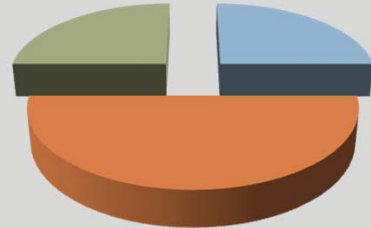
**Group #3**



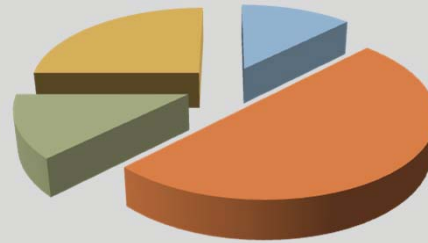
**Group #4**



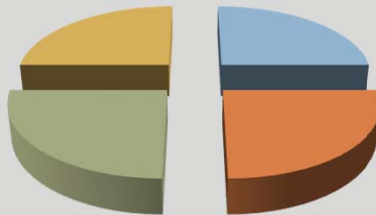
**Group #5**



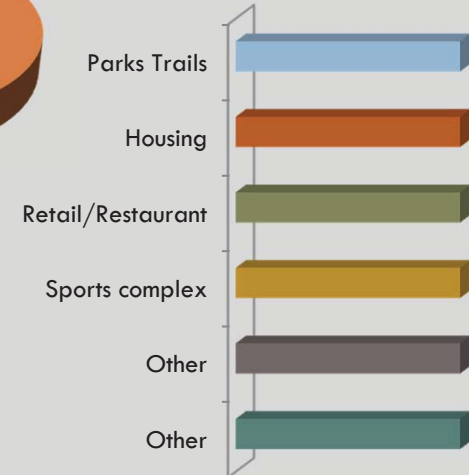
**Group #6**



**Group #7**



**Group 8**

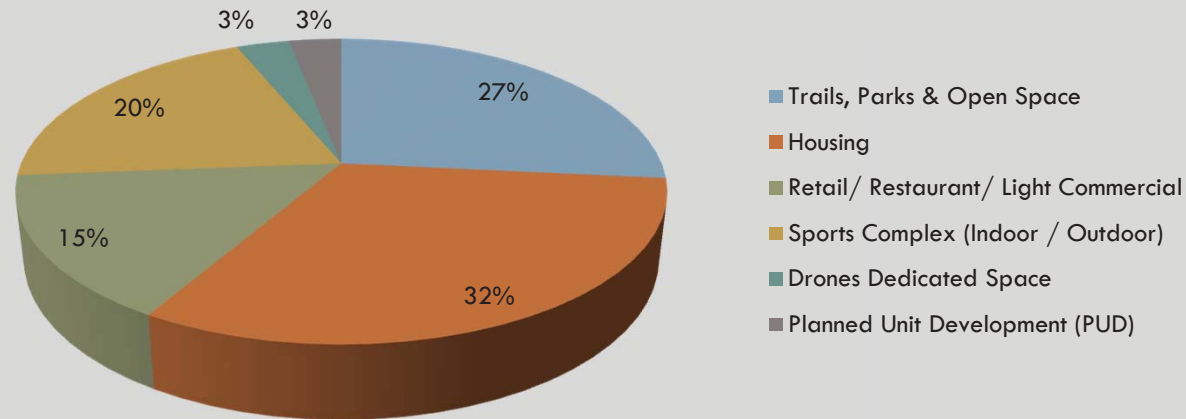


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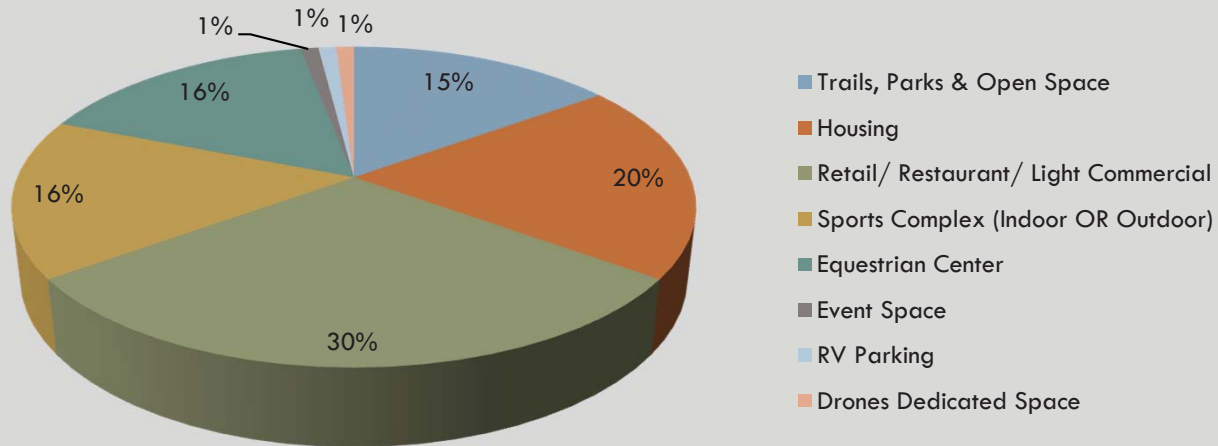


# Meeting #1 Summary

## Average of Public Meeting (2/9/2017) Input



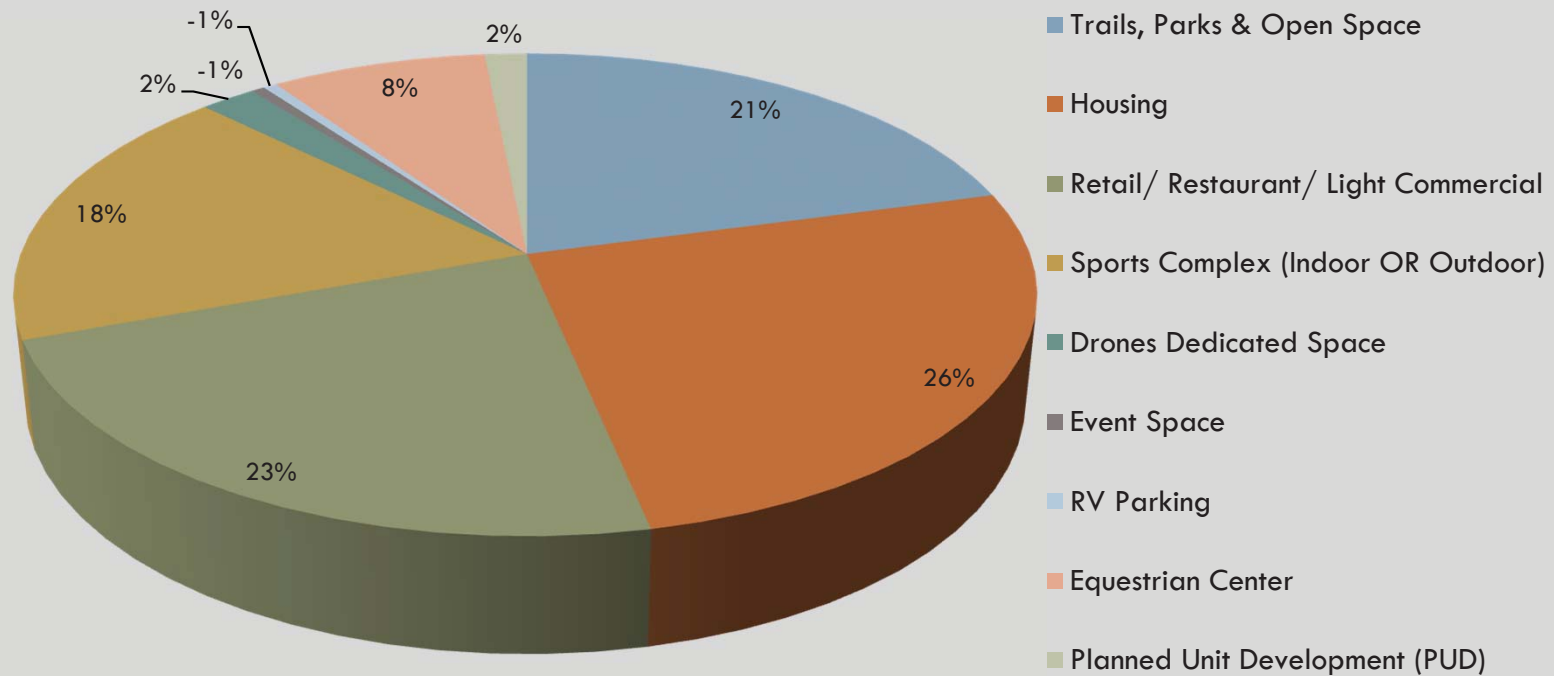
## Web-based Public Comment



City of Rome — RETHINK WOODHAVEN

# Meeting #1 Summary

**Average Percent Combined  
(Public Meeting + Web-based)**



City of Rome – RETHINK WOODHAVEN

## Market Analysis Findings (The Williams Group)

### Live:

- Multi-family rental (1 & 2 BR, geared toward Millennials)
- Multi-family (2 & 3 BR, geared toward Empty Nesters)
- Retail amenities
- Some Single-Family Housing (3 & 4 BR, geared toward Empty Nesters)

### Work:

- Co-working Space (1 based on subscribers)
- Maker Space
- Hotel (Upscale extended stay for business people)

### Play:

- Events
- Trails (Connections to Millennial Housing is essential)
- Sports/Great Lawn
- Shuttle/Connections

### Other:

- Farmers Market and Local Crafts (Move to a more year round market)





# Concept Plans

## OPTION 1

- Waterfront park with event area and playground
- Village Green Concept with mixed use in phased development
- Multi-family and Single-Family Homes
- Large area near RFA for sports complex or other event type use



City of Rome — RETHINK WOODHAVEN



# Concept Plans

## OPTION 2

- Extend Commercial Corridor on Floyd
- Waterfront and linear park with community garden, trails, pavilion and plaza
- Apartment Housing and Single- Family Homes



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# Concept Plans

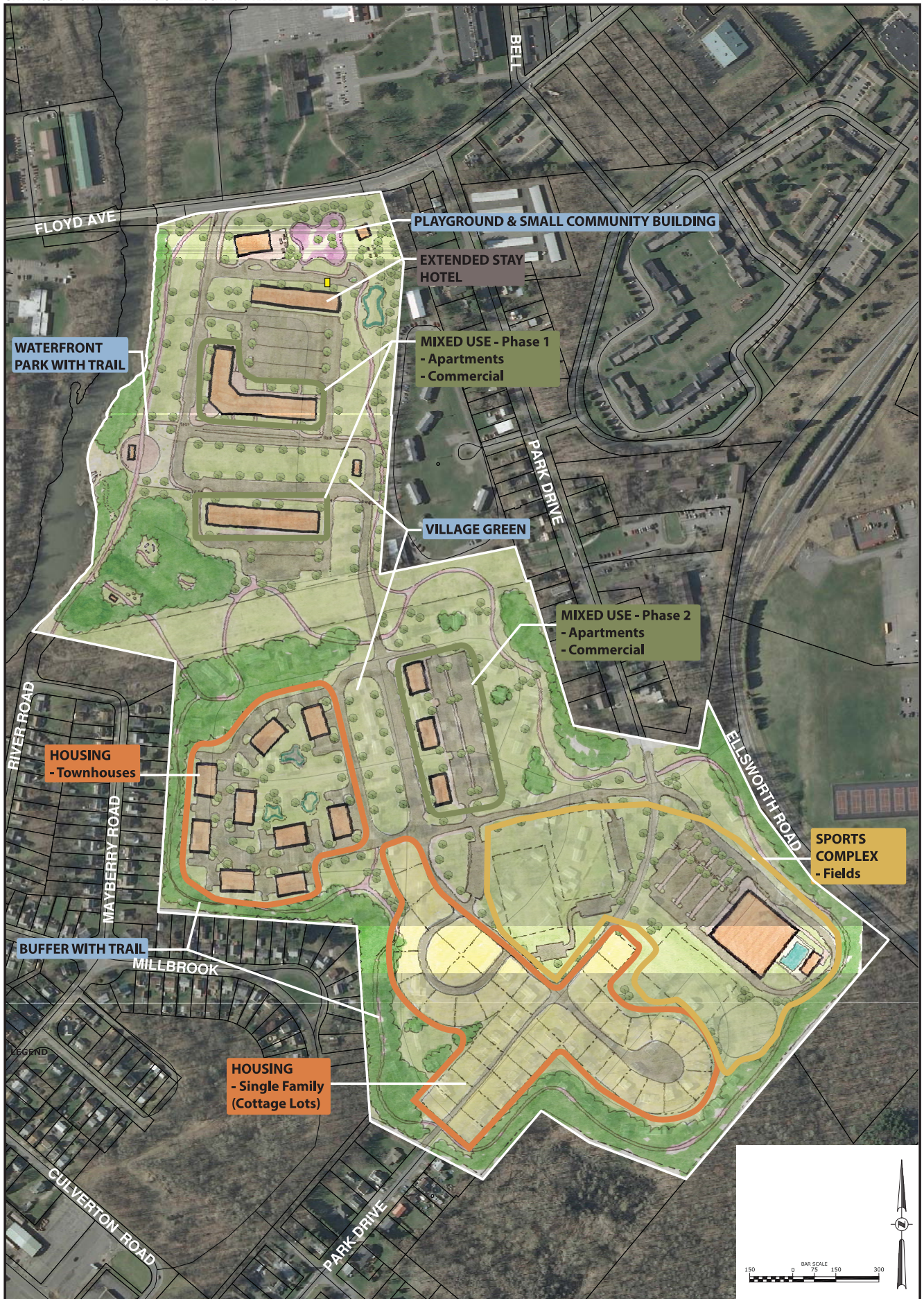
## OPTION 3

- Hotel
- Large Scale Rec / Community Center
- Retail along Park Drive with apartments
- Indoor / Outdoor Event Space near RFA
- Townhouse development at core



City of Rome — RETHINK WOODHAVEN









## RETHINK WOODHAVEN OPTION 2







City of Rome  
Oneida County, NY

## RETHINK WOODHAVEN OPTION 3

**C.T. MALE ASSOCIATES**  
Engineering, Surveying, Architecture & Landscape Architecture, D.P.C.  
50 CENTURY HILL DRIVE, LATHAM, NY 12110  
518.786.7400 • FAX 518.786.7299  
UPDATED: 2017-05-23



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C.T. MALE ASSOCIATES





## Public Meeting 2 Comment Period

On May 23, 2017 the project team hosted a public meetings seeking input on the Revitalization of Woodhaven / Riverwalk project and the Concept Alternatives. Following a presentation of the project status and concepts, the audience was asked for input on these concept alternatives. The paraphrased comments compiled from this meeting are below:

1. Where on Floyd Avenue is the project location?
2. I live there and I don't want anything there.
3. I have to pick up garbage on the trail all the time.
4. I walk my dog on site every day, north of the power lines the area should remain all natural.
5. "Build something and I'll do my best to take it down."
6. There should be a nature preserve along Waterfront
7. There is grant money for wayfinding signage and trash receptacles for the trails
8. 70% of the people working at the Tech Park don't live in Rome. We want to capture the Griffiss employees.
9. "I'm a hockey mom. We have a three million dollar arena nearby but everyone in town for tournaments goes to the casino to stay. We need more nice hotel spaces.
10. Railroad tracks are a problem; no other exits from school lot – kids and parents use it and parents want safer and better flows for visitors and events.
11. People want to buy homes in the mid-range.
12. The need for the extended stay hotel is supported by other independent market studies as well as the study associated with this project.
13. People squat on site now.
14. Love idea of sports/community center. Need indoor complex. Track / basketball / baseball.

## C.T. MALE ASSOCIATES

*Meeting Date May 23, 2017  
Rethink Woodhaven  
Page - 2*

15. This is the perfect location for a 55+ community; walking / biking / viewing / socialization with in a community. Road network is perfect; get to Utica/Syracuse quick.
16. Don't want to mow the lawn or even shovel but don't need to have a golf course community either. Prefer low maintenance housing.
17. Have to grow tax base. Need more quality housing to do that.
18. Marik Road is an example project of how people will come if you build it.
19. We are a "bedroom community", young people commute now and like it.
20. Section of the apartment buildings could be for 55+ only.
21. Shared driveway are preferable.
22. Study reference indicated that the Northeast faces critical shortage of 55+ housing; Auburn, New York has an example housing complex.
23. Prescott Village or Keeshall (sp) Village as an example. Mixing millennials and 55+ would be nice.
24. Seniors are leaving the area because they don't have a choice for downsized living, not because they want to leave. The project should include housing for seniors in a senior living atmosphere where there are social opportunities and people can age with friends.
25. I live on the fence line and the sooner something happens the better – it needs to get better.
26. Kent Amphitheater was located on site in past.
27. I like the recreation center in south, near RFA. The ice rink could be moved to the recreation center.
28. Old Stage Coach Stop nearby. It was located where the Stubbing Post is now.
29. We want underground utilities if removed.
30. Albert Witch has a Louis Holenbeck book with historical information.

# C.T. MALE ASSOCIATES

*Meeting Date May 23, 2017*

*Rethink Woodhaven*

*Page - 3*



# **APPENDIX B**

## **FORM BASED CODE**

**Article 9.2**

# **Woodhaven Development District**

**Form-Based Code**

**DRAFT**



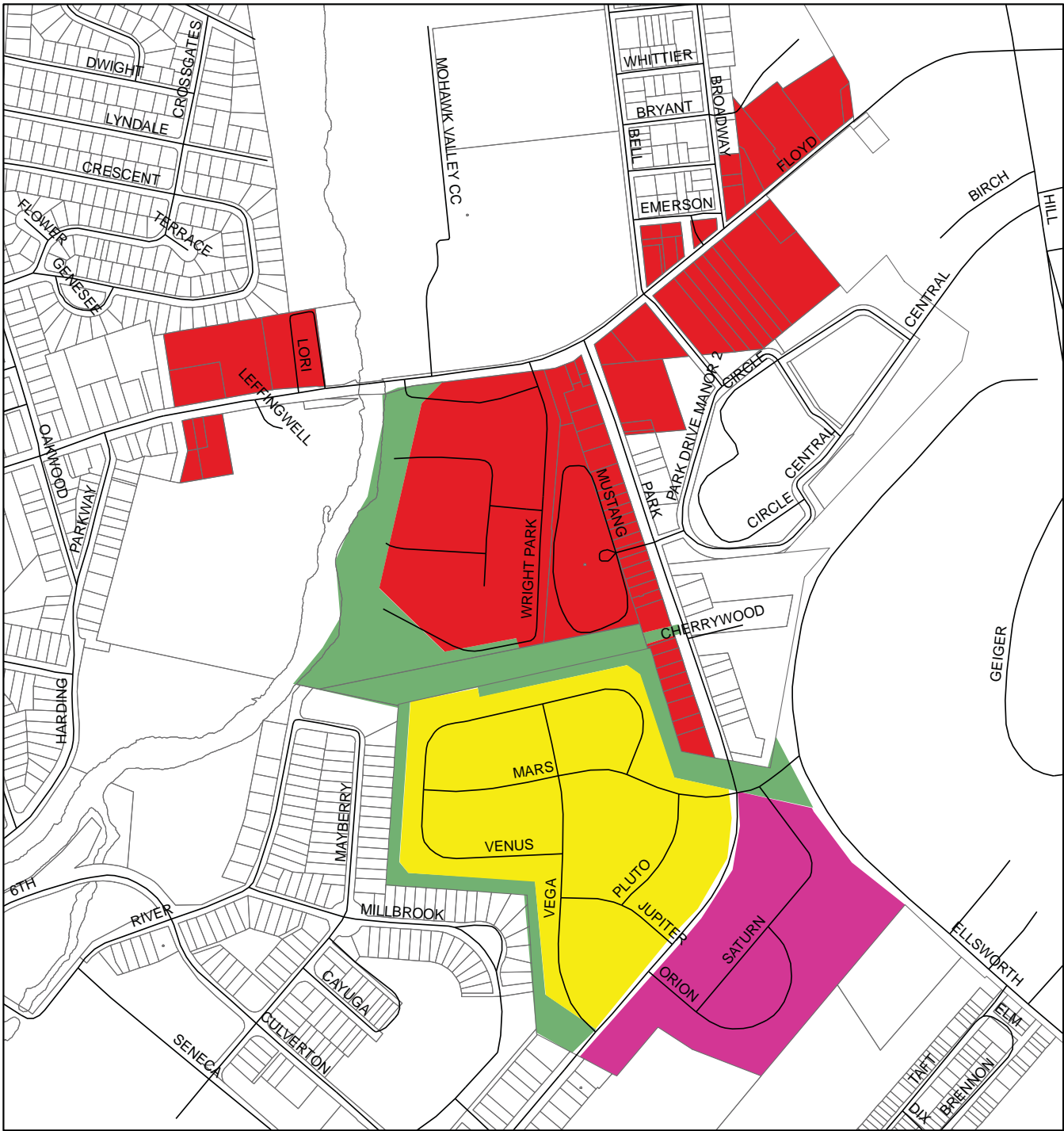
City of Rome, New York

**February 16, 2018**

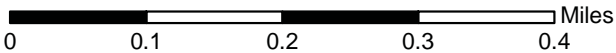




# Woodhaven Redevelopment District Boundary and Subareas



- Subarea\_A
- Subarea\_B
- Subarea\_C
- Open Space



This information has been compiled for planning purposes and is based on the applicable scale. Accordingly, the locations of the various district lines and the areas encompassed within the identified districts are not exact and are subject to interpretation. Please be advised that the City of Rome Zoning Board of Appeals has the sole authority to interpret the depictions on this map and any questions relating to the same should initially be directed to the City of Rome Code Enforcement Officer. Any person who undertakes any action based on this Map without the assistance of the City of Rome Code Enforcement Officer and/or the Rome Zoning Board of Appeals does so at his/her own risk. The City of Rome shall not be liable for any misuse or misrepresentation of this information. The City of Rome makes no claim as to the completeness of the data contained hereon. The information contained herein may not be reproduced or transmitted for commercial purposes or for any other purpose without the express approval of the City of Rome.

For exact district boundaries see Setion 80, Article 23.4 Map Exhibits

## DESIGN OBJECTIVES

The Woodhaven Redevelopment District seeks to realize the community's vision for the most dynamic, sustainable and attractive mixed-use neighborhood in Upstate New York with a high standard for design and a practicable phased redevelopment strategy. Design objectives strive to provide a sustainable mixed-use revitalization plan to advance Smart Growth principles and include:

- Mix land uses
- Compact building designs
- Create a range of housing opportunities and choices
- Create an accessible and multi-generational, walk-able community
- Foster distinct, attractive communities with a strong sense of place
- Preserve open space, natural beauty, and critical environmental areas
- Engage the waterfront of the Mohawk River
- Strengthen and direct development toward existing communities
- Provide a variety of multimodal transportation choices



# §Article 9.2 Woodhaven Redevelopment District

## A. INTRODUCTION

This Section provides regulatory standards governing land use and building form within the Woodhaven Redevelopment District. The form-based code is a reflection of the community's vision for Woodhaven and implements the intent of the Woodhaven Revitalization Plan.

The form-based code is intended for adoption as part of the City of Rome Zoning Ordinance. Upon adoption, it will supersede and replace existing Zoning provisions regarding zoning districts, allowable land uses, permit requirements, and site development standards.

### 1. Purpose & Intent

The purpose of the Woodhaven Redevelopment District is to create a dynamic, sustainable and attractive mixed-use neighborhood with a focus on recreation. The Woodhaven Redevelopment District will harmonize single-family, two-family, multiple-unit, and mixed-use structures to attract a broad spectrum of families, professionals, retirees, and students. In the context of a multiple-use, intermodal Greenbelt concept, this District will connect to existing municipal streets, sidewalk, and trails in the surrounding neighborhoods and prioritize the preservation and enhancement of natural resources, urban trees, and public greenspaces along the Mohawk River area to maximize the environmental, financial, and social benefits. The redevelopment of this area will also serve to prioritize and enhance the physical connection to the Rome Free Academy High School, and the Griffiss Business and Technology Park.

### 2. Applicability

The provisions in this section shall apply to all development of property within the Woodhaven Redevelopment District.

### 3. Conflicting Provisions

In the event that this Section conflicts with any other provision of the Rome Zoning Code or the attached Appendices, the provision of this Section shall supersede, except that where this Section is silent, the Rome Zoning Code or the attached Appendices shall apply.

## B. SUBAREAS ESTABLISHED

The Woodhaven Redevelopment District is hereby divided into subareas as shown here which is hereby made part of this ordinance.

- SUBAREA A - MIXED-USE COMMERCIAL AND RESIDENTIAL
- SUBAREA B - SINGLE-FAMILY RESIDENTIAL
- SUBAREA C - MID-DENSITY CAMPUS
- SUBAREA - BUFFER/OPEN SPACE

The subareas have been organized based upon the Woodhaven Revitalization Plan preferred Master Plan.

## C. USE REGULATIONS<sup>1</sup>

Uses permitted within the Woodhaven Redevelopment District Subareas are those listed in Sub-section F

## D. REGULATIONS APPLICABLE TO ALL

The following standards apply to all sites and buildings in all Subareas unless expressly stated otherwise.

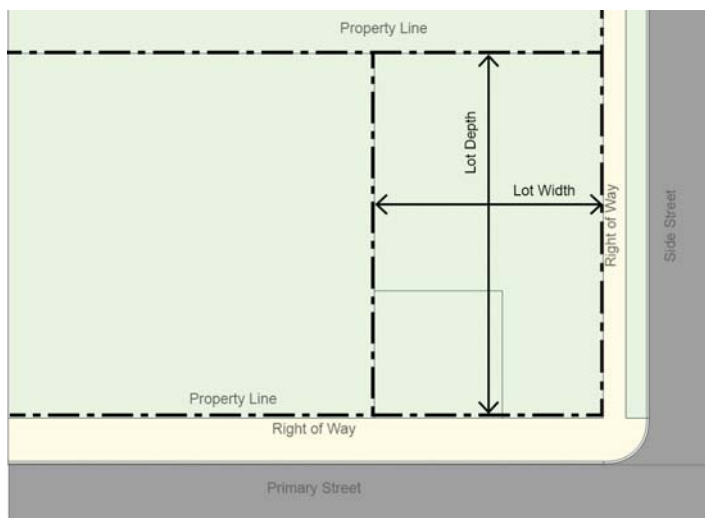
Applications must conform to the provisions set forth in the Rome Zoning Code, including but not limited to Articles 11 through 15 (Uses, Development Standards, Off-Street Parking and Loading, Landscape, and Signs), and any additional provisions noted in this Section.

---

<sup>1</sup> As defined in the Rome Zoning Code



## 1. Site Requirements

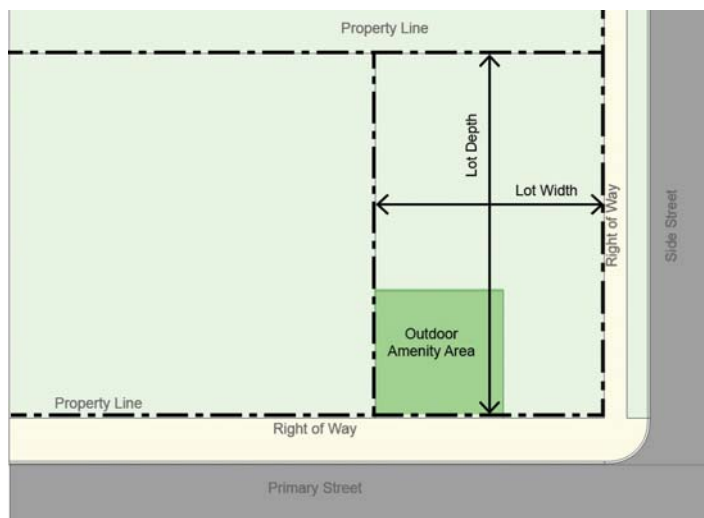


### A. Lot Width

The distance between side lot lines measured at right angles to the lot depth at a point from the front lot line equal to the front yard specified for the district.

### B. Lot Depth

The mean horizontal distance between the front and rear lot lines, measured in the general direction of the side lot lines.



### C. Outdoor Amenity Space

Where required, as noted within each Subarea, outdoor amenity areas must be provided on the site and must be available as unenclosed, improved active or passive space for use by the occupants of the development. It may be provided in one contiguous open area or multiple areas on the site.

#### i. Size and Type

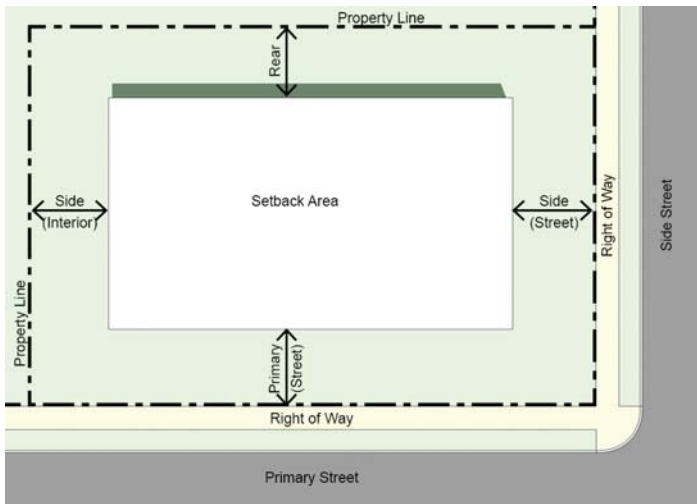
Each must be at least 100 square feet in size and may include:

- Playgrounds and athletic court
- Splash pad
- Trail, path (minimum 10 feet wide)
- Garden, sitting area
- Rooftop deck
- Pavilion, gazebo, greenhouse
- Outdoor dining

#### ii. Other Requirements

- Outdoor amenity areas can include bike racks, kiosks, benches, sculptures, and fountains.
- Outdoor amenity areas cannot be used for parking except for emergency access
- Outdoor amenity areas must be designed to be permanent.

## 2. Building Placement



### A. Building Setbacks

Building setbacks apply to all structures, refer to sub-section F. Regulations Pertaining to Subareas.

#### *Measurement of setbacks*

Primary and Secondary street setbacks are measured from the property line. Side, rear, and interior setbacks are measured from the property line (or edge of right-of-way where there is an alley).



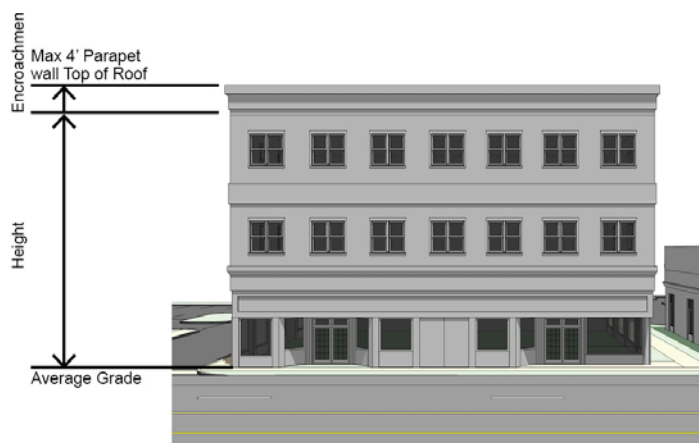
### B. Build-to Zone

One of the most important defining elements of the public realm is the street wall. The street wall is made up of building facades that are placed within the build-to zone to create a continuous building fabric. The build-to-zone is the area between the minimum and maximum front setbacks. Portions of a building must be placed within this zone along a prescribed percentage of the lot width.

To determine compliance with the build-to zone requirements, the total width of the building portion located within the build-to zone is divided by the width of the lot.

Build-to zone standards are prescribed in sub-section F *Regulations Pertaining to Subareas*.

### 3. Building Height



#### A. Measurement

Building height is regulated in feet and is measured from the average grade of the frontage facing a Primary Street to the mean height level between the eaves and ridge of a gable, hip, mansard, or gambrel roof or to the highest point of roof surface of a flat roof, not including allowed encroachments.

#### B. Height Encroachments

All buildings must be constructed within the maximum building height, with the exception of height encroachments allowed within each Subarea. Allowed encroachments are specified in sub-section *F Regulations Pertaining to Subareas*.

### 4. Facade Requirements



#### A. Transparency

Transparency is the minimum percent of street-facing facade that must be comprised of transparent windows. The ground story is measured between 2 and 12 feet above the sidewalk. This requirement applies to Primary and Secondary streets only. Opaque elements of a window (such as panes, frosted or tinted areas, and opaque portions of window signs) cannot be used to meet the transparency requirement.

#### B. Building Materials

Permitted building materials are prescribed within each Subarea, as specified in sub-section *E Regulations Pertaining to Subareas*.

#### C. Pedestrian Access

All buildings must provide a street-facing entrance operable to residents or customers at all times. There must be a connection between all main building entrances and the closest sidewalk (or street if there is no sidewalk).



5. Setback Encroachments

All buildings and structures must be located behind the required setback except for the encroachments allowed below.

A. Awnings



Description	Standards
An ornamental roof-like protective cover over a door, entrance, window or outdoor service area that projects from the face of a structure and is constructed of durable materials.	<div><div>(A)</div>Depth (max)5'</div>
	<div><div>(B)</div>Clear height above sidewalk (min)7'</div>
General Provisions	Right-of-Way Permit
Awnings shall be continuous above openings below. Breaks in awnings shall coincide with breaks in facade openings below.	All applicants proposing encroachments into the public right-of-way must obtain a right-of-way permit from the Department of Public Works.
Canvas and fabric awnings must be made of durable fabric.	
High-gloss or plasticized fabrics are prohibited.	
Awnings should be made of a traditional material (canvas-like), design and color. Traditional colors include black, dark green, navy, and maroon. Vertical stripes are an appropriate option.	
Internally illuminated or backlit awnings are prohibited.	
Awnings must be self-supporting. No support poles may encroach onto the right-of-way.	

B. Balconies



**Description**

A balcony is an exterior platform that projects from or into the façade of a building and is surrounded by a railing, handrail, or parapet.

Standards		
Ⓐ	Projecting depth (max)	6'
Ⓑ	Clear height above sidewalk (min)	9'

**General Provisions**

Balconies may not be fully enclosed.

Balconies must match the architectural design of the building, using similar details and materials.

**Right-of-Way Permit**

All applicants proposing encroachments into the public right-of-way must obtain a right-of-way permit from the Department of Public Works.

*Inappropriate (fully enclosed balcony)*



## 6. Screening

*Appropriate Screening*



*Inappropriate*



### A. Screening

#### *i. Service Areas*

Trash collection, recycling, compaction, and other similar service areas must be located to the side or rear of buildings and must be screened from view from adjacent properties and from a public right-of-way (not including alleys).

Service areas that are not integrated into a building must be screened on at least three sides by a wall at least six feet high and on the 4th side by a solid gate at least six feet high.

#### *ii. Roof Mounted Equipment*

Roof mounted equipment must be screened from ground level view from adjacent property and adjacent public rights-of-way.

#### *iii. Wall Mounted Equipment*

Wall mounted equipment must be screened by landscaping or an opaque screen and is not allowed on any surface that directly faces a front or side yard lot line.

#### *iv. Ground Mounted Equipment*

Ground mounted equipment must be screened from view by landscaping or a fence or wall that is equal to or greater than the height of the equipment.

### B. Fences and Walls

#### *i. Height*

Fences and walls required pursuant to this Subsection may be no higher than 8 feet.

#### *ii. Materials*

- Walls and fences must be constructed of high quality materials, such as decorative blocks, brick, stone, split-faced block, or other materials consistent with the associated building.
- Exposed standard concrete walls are prohibited.
- Barbed wire, concertina, and chain-link fences are prohibited.



## 7. Lighting Regulations

### *Appropriate Lighting*



### *Inappropriate Lighting*



### **A. Lighting**

#### *i. Prohibited Sources/fixtures*

- Cobra-head style fixtures having dished or drop lenses or refractors.
- Temporary search lights and other high intensity, narrow beam lights.
- Amber hue lighting, such as high pressure sodium fixtures and equivalent performance are not permitted.

#### *ii. Building Lighting*

- Building mounted lighting must be complementary to the architectural style of the building and surroundings.
- Building lighting may not be installed at a height exceeding 15 feet above grade.
- Exterior building light fixtures must be full cutoff.

#### *iii. Site Lighting*

- Site lighting fixtures must be complementary to the architectural style of the building and surroundings.
- Site lighting fixtures must be full cutoff. Light trespass into adjacent non-commercial areas shall not exceed 0.1 foot candles in intensity.
- Fixtures within pedestrian areas, along sidewalks and walkways may be no higher than 8 feet.
- Fixtures within parking lots may be no higher than 20 feet.

## E. REGULATIONS PERTAINING TO SUBAREAS

The following regulations shall apply to property within each corresponding Subarea.

### SUBAREA A - MIXED USE COMMERCIAL AND RESIDENTIAL

The northern area is defined by +30-acre parcel fronting Floyd Avenue and the Mohawk River (north of the electrical transmission right-of-way), and includes the Floyd Avenue commercial corridor from just west of the Mohawk River bridge stretching to Griffiss Business and Technology Park; where the plan prescribes mixed-uses including commercial, residential, and recreation. The multi-story buildings on the 30 acre parcel should front on Floyd Avenue, extending the existing commercial corridor and paying close attention to the streetscape aesthetic. Proposed buildings should extend along the Woodhaven entrance drive as much as practical to pull the streetscape aesthetic interior to the site. The western building should, ideally, interact with the Mohawk River, engaging the public riverfront and trail. Commercial activities should be encouraged to spill outside the building by providing semi-private patios and outdoor spaces that maximize the interplay of humans and nature. Pedestrian connections and outdoor amenities are vital components of any site plan proposed for the northern section.

The multi-family housing in this area should be laid out with a walkable concept including pedestrian connections to the Mohawk River Trail and the proposed commercial uses.



## SUBAREA B - SINGLE-FAMILY RESIDENTIAL



The central area, between the overhead electrical transmission lines and the realigned Park Drive, provides for flexibility to potential developers. This subarea provides a balance between the community's desire for single-family housing with the desire for natural or open space areas and trails. This subarea allows for flexibility to subdivide or sell acreage as the market demands. The style of this development within this subarea should include small lots consistent with lot sizes in the adjacent neighborhoods. Sidewalks and trail spurs must be included to enhance pedestrian and bicycle connectivity and accessibility for the mobility impaired.



## **SUBAREA C - MID-DENSITY CAMPUS**

The southern area, southeast of Park Drive, is comprised of moderate density residential allowing for townhomes and apartments. This area could be proposed as a senior living community or be open to a broad spectrum of residents. Uses could include low maintenance properties, access to sidewalks and trails, safe and well-lit open spaces, and accessibility to minor conveniences (i.e. coffee shop, small retail). Sidewalks and trails should connect within and to the adjacent neighborhoods.

## SUBAREA BUFFER AND OPEN SPACE

The buffer and open space areas shall be owned and controlled by the City of Rome. This subarea should include augmenting the urban canopy and preserving the continuity of natural areas. Further this subarea should provide circulation for non-motorized users and act as a "Greenbelt".



## F. WOODHAVEN SUBAREAS PERMITTED USE MATRIX

TABLE F	A	B	C
Adult Entertainment Business			
See Sec. 12.3(a)			
Agricultural Implement Sales			
Agriculture			
Airport			
See Sec. 12.3(b)			
Amusement Facility - Indoor	X	X	X
Amusement Facility - Outdoor	X	X	X
Animal Boarding			
See Sec. 12.3(c)			
Animal Hospital	X		X
See Sec. 12.3(c)			
Animal Kennel: Commercial			
See Sec. 12.3(c)			
Animal Shelter			
See Sec. 12.3(c)			
Art Gallery	X		X
Arts Studio	X		X
Bank/Financial Institution	X		
Bed and Breakfast			
See Sec. 12.3(d)			
Billboard			
See Sec. 12.3(e)			
Boat Launch			
Boat and Marine Sales - No body work or collision repair			
Boat and Marine Rental			
Boat and Marine Repair and Service			
Body Modification Establishment			
Broadcasting Facility - With Antenna			
Broadcasting Facility - No Antenna			
Brew Pub	X		

TABLE F	A	B	C
Campground			
See Sec. 12.3(f)			
Car Wash			
See Sec. 12.3(g)			
Cemetery			
Community Center	X		X
Community Garden		X	
See Sec. 12.3(h)			
Contractor Office - No Equipment Storage			
Contractor Office - With Equipment Storage			
Conservation Area			
Convention Center	X		
Cultural Facility	X		X
Day Care Center	X		X
See Sec. 12.3(i)			
Day Care Home			X
See Sec. 12.3(i)			
Drive-Through Facility			
See Sec. 12.3(j)			
Drug Treatment Clinic			
Drug/Alcohol Treatment Facility, Residential			
Dwelling, Accessory Dwelling Unit		X	X
See Sec. 12.3(k)			
Dwelling, Caretakers Unit			X
Dwelling, Above the Ground Floor	X	X	X
Dwelling, Attached Single-Family	X	X	X
Dwelling, Detached Single-Family		X	X
Dwelling, Two-Family	?	?	?
Dwelling, Multi-Family	X		X
Farmstand	X		
Freight Terminal			
Funeral Home - Without Crematorium			
Funeral Home - With Crematorium			

TABLE F	A	B	C
Gas Station			
See Sec. 12.3(l)			
Golf Course/Driving Range			
Government Office	X		X
Group Home			X
See Sec. 12.3(m)			
Healthcare Facility			X
Heavy Retail, Rental, & Service			
Hotel	X		X
Industrial Design	X		X
Industrial, Artisan	X		X
Industrial, General			
See Sec. 12.3(n)			
Live Entertainment	X		
Manufactured Home Park			
See Sec. 12.3(o)			
Marina and Dock			
Medical/Dental Clinic	X		X
Medical Marijuana Dispensary			
Micro-Brewery/Distillery/Winery	X		
Neighborhood Non-Residential Reuse			
See Sec. 12.3(p)			
Nursery/Greenhouse - Retail			
Office	X		X
Outdoor Dining	X		
See Sec. 12.3(q)			
Outdoor Storage			
See Sec. 12.3(r)			
Park	X	X	X
Parking Lot (Principal)			
See Sec. 12.3(s)			
Parking Structure (Principal)			
See Sec. 12.3(s)			
Passenger Terminal			
Personal Service	X		



TABLE F	A	B	C
Places of Worship			
Private Clubs or Lodge			
See Sec. 12.3(l)			
Public Safety Facility			
Public Works Facility			
Reception Facility	X		
See Sec. 12.3(u)			
Recreational Vehicle Park			
See Sec. 12.3(f)			
Research & Development	X		X
Residential Care Facility			X
See Sec. 12.3(v)			
Restaurant	X		
Retail Goods Establishment	X		
Salvage Yard			
See Sec. 12.3(r)			
School - Primary or Secondary			
School - College or University			
School - Trade or Vocational			
Self-Storage			
Solar Array			
See Sec. 12.3(w)			
Specialized Food Production	X		
Stable			
Tavern	X		
Utilities			
Vehicle Dealership			
See Sec. 12.3(x)			
Vehicle Operation Facility			
Vehicle Rental Agency			
Vehicle Repair – Major			
See Sec. 12.3(y)			

TABLE F	A	B	C
Vehicle Repair – Minor			
See Sec. 12.3(y)			
Vehicle Parts & Accessories Sales			
Warehouse			
Wholesale			
Wind Energy System			
See Sec. 12.3(z)			
Wireless Telecommunications			
See Sec. 12.3(aa)			
<b>Temporary Uses</b>			
Farmer's Market	X	X	X
See Sec. 12.4(a)			
Temporary Camping (Private Property)			
See Sec. 12.4(b)			
Temporary Contractor's Office			
See Sec. 12.4(c)			
Temporary Mobile Food Sales	X	X	X
See Sec. 12.4(d)			
Temporary Outdoor Entertainment	X	X	X
See Sec. 12.4(e)			
Temporary Outdoor Sales			
See Sec. 12.4(f)			

## G. SUBAREA STANDARDS MATRIX

Standards	Subarea A	Subarea B
Lot Dimensions		
Area (min.)	Detached single-family: none allowed Attached single-family: none allowed MF: 5,000 sf + 1,000sf/du	Detached single-family: 4,000 sf Attached single-family: 2,500 sf Two-family: none allowed
	No minimum lot area for commercial and mixed use	
Width (min)	none	none
Outdoor Amenity Area		
Lots under 5,000 sf	not required	not required
Lots over 5,000 sf	20%	10%
Landscaping		
Site Landscaping	As required by Rome Zoning Code Article 15	
Setbacks		
Floyd Ave/ Park Drive/ Primary Street (min/max)	0'	20' or Equivalent to Building Height, whichever is greater / 20' or Equivalent to Building Height, whichever is greater
Secondary or Internal Street (min/max)	10'/20'	15' Min. for Detached, 20' Min. for Attached
Side (min/max)	5'/10' for Interior Lot Lines	5'/10'
Rear (min/max)	20' min	5' min
Mohawk River (min from Open Space Subarea)	50'	n/a
Required Façade within Build-to Zone		
Front	75%	75%
Side Street	50%	50%
Building Height (feet)		
Max	50'	35'
Min	25'	16'
Permitted Height Encroachments (max feet)		
Spire, cupolas, flagpoles	5'	5'
Chimney, flue, vent stack	5'	5'
Elevator/stairway access to roof	12'	12'
Parapet Wall	4'	6'
Mechanical Equipment	6'	6'
Skylights	9'	9'
Transparency		
Ground story, street facing	75%	60%
Ground story, river facing	60%	n/a
Upper story street facing	60%	50%
Residential (ground floor)	50%	50%
Restricted Materials		
Stucco (cementitious finish)	Prohibited	Prohibited
Wood clapboard or shingles (cedar shake/shingle is allowed)	Prohibited	Allowed
Vinyl (Vinyl siding shall meet the standards of the vinyl siding institute (VSI) and be a min. thickness of .048")	Allowed	Allowed
EIFS	Prohibited	Prohibited
Metal (accent only is allowed)	Prohibited	Prohibited
Pedestrian Access Required		
Entrance facing street	Yes	Yes
Entrance facing waterfront	Yes	n/a

## H. APPLICATION REVIEW

### 1. Applicability

Development applications on parcels within the Waterfront District must comply with the approval requirements of this subsection.

### 2. Environmental Review

Development applications on parcels within the Waterfront District are subject to review under SEQR, in accordance with Rome Zoning Code Article 6, Environmental Review.

### 3. Pre-application Conference

Prior to submission of a development application, the applicant is encouraged to schedule a pre-application conference with the Planning Department to discuss application procedures, standards, and regulations of this subsection.

A request for a pre-application conference by a potential applicant must be accompanied by preliminary project plans in hard copy format no smaller than 11 x 17. The request must also include a cover letter describing the project, including the parcel number(s) and address of the proposed site, the proposed land uses, the square footage(s), height(s) and character of the proposed development.

### 4. Application Requirements

For proposals subject to compliance with requirements set forth in the Waterfront District, an application for approval must be submitted in accordance with the site plan checklist requirements prescribed by Rome Code Zoning Code Section 19.4, Application for Site Plan Approval.

### 5. Completeness Review

The Planning Department will review the submitted materials for completeness and, within 10 business days, either accept the application as complete or request further information from the applicant.

### 6. Administrative Review

Upon acceptance of a complete application, the Planning Department will, within 30 days, review the application for consistency with the requirements of this Section and forward

the application to the appropriate City Departments and, if necessary, local agencies (ex. county 239 review) for review and recommendation.

Upon receipt of department and agency comments, the Planning Department must make an initial determination of compliance with the requirements of this Section and any applicable requirements of the City's Zoning Code, and prepare a written staff report.

### 7. Administrative Approval

Applications that comply with all standards of this Section and fall within the thresholds listed below may be processed and approved by the Planning Director or designee.

#### Administrative Approval Thresholds

##### Multi-Family Residential Uses

1. New multi-family up to 4 units or multi-family conversions up to 4 units.
2. Expansion of existing structures by less than 30% or more of current square footage.

##### Non-Residential Uses

1. Non-residential or mixed-use development of less than 4,000 square feet.
2. Expansion of less than 30% of the current gross square footage.

##### Parking Lots, Parking Structures, Loading and Stacking Area

1. Any new parking lot or parking structure with less than 20 spaces.
2. Expansion of a parking lot, parking structure, loading or stacking areas by less than 30% of total area. Changes to parking lots, parking structures, loading or stacking areas may require Planning Board Approval at the discretion of the Planning Director.

Applications that exceed the thresholds listed above are subject to Planning Board Approval.



## 8. Planning Board Approval

The Planning Board may approve applications that do not comply with the standards of the Waterfront District, if the proposal is substantially consistent with the criteria in this subsection.

The Planning Board may request comments from the public to make a determination to approve, approve subject to conditions, or disapprove the application.

### *i. Planning Board Approval Criteria*

The criteria herein must be used by the Planning Board in reviewing applications subject to Site Plan review, including all buildings, structures, signs, and other site features:

- The purpose, intent, and Design Objectives of the Waterfront District are met.
- The proposal is compatible with the surrounding properties.
- The proposal minimizes impacts of noise, light, debris, and other undesirable effects upon abutting properties and the abutting District or Subarea as a whole.
- Loading and refuse areas are adequately screened such that they are not visible from adjacent rights-of-way and abutting properties.
- Ingress, egress, internal circulation, off-street parking, loading/service areas are designed to promote safety, convenience, and provide a high quality pedestrian environment.
- Signage is designed to provide compatibility with building form, shape and color.

### *ii. Exceptions*

This Section does not authorize the Planning Board to approve the following in the Waterfront District:

- Electronic message boards
- A use prohibited by this Section



# **APPENDIX C**

## **MARKET ANALYSIS**



# Rome Woodhaven DRAFT

## Site Development Options Testing Matrix

Theme	Casino attraction	Entertainment	Local Sports	Authentic Destination	Business and Education	Downtown repopulation	Water and Tourism	Cultural and Education	Office with a new twist	Services and Support	
Criteria	1. Family Resort Casino Inc. hotel and amenities	2. Year Round major sports/entertainment Destination Center	3. City Sports Park (outdoor venue)	4. Year round mixed use Farmers market and craft destination retail center including local micro brewery	5. R&D Park--linked to SUNY	6. Mixed-Use Housing Development--affordable housing and amenities plus retail	7. Eco Tourism and canal tourism center--Inc. boaters services, retail, event plaza	8. Education and cultural zone (Comm. College linked to industry)--including CC expansion with departments catering to business clusters plus waterfront history museum	9. Office/ retail mixed use development--live work lofts	10. Health Care offices/clinic/ senior center	Ranking Criteria ( 5 best, 1 least attainable)
<b>Economic</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	
Waterfront Development Opportunities	3	3	3	5	2	2	5	2	2	1	linked to waterfront and related activities
Real Estate Market Support	2	4	0	4	2	5	2	3	2	1	needs market support to score well
Job Creation	5	4	1	5	5	2	3	4	3	3	more jobs permanent the better
Site size and configuration compatible with market supportable real estate	2	5	1	5	5	3	5	4	5	3	market linked to site
BOA issues	2	4	5	4	3	1	5	4	2	1	more clean up required for residential related uses
Ability to create critical mass to support future development	4	4	1	4	5	3	4	4	3	2	permanent people on site year round
Positive Downtown Impact from development	3	4	1	5	4	3	4	4	3	2	off site impact
<b>Subtotal</b>	<b>3.0</b>	<b>4.0</b>	<b>1.7</b>	<b>4.6</b>	<b>3.7</b>	<b>2.7</b>	<b>4.0</b>	<b>3.6</b>	<b>2.9</b>	<b>1.9</b>	
Comments on economic	More analysis required to fully understand demand; comparable show primarily supported by local visitors, not a tourism destination	Has ability to create a major destination for fun and play oriented to families all year round and support more events	low impact, nice park--will have limited impact to due short seasons and limited major events	links to local industry, supports jobs growth from existing assets, tourism and destination attraction, supports boating traffic as a reason to stop	best for jobs, intrinsic on link between education and attracting a major high growth, high pay sector	re-populates downtown with more people to use services but must be linked to fed. housing for affordable units and somewhat privatizes the waterfront	oriented to the canal and tourism -bring in spending dollars from all over the north east--but seasonal bent unless able to include a winter attraction	region has low educational attainment and skills in demand in growth industries--this could help support long term business attraction	office is over supplied but housing work loft may have a way to support local ally based industry with incentives	young low income population --new services not in demand at this time	
<b>Physical</b>											
Vehicle access	1	2	5	4	4	4	4	4	3	4	significant traffic or traffic all at once could be difficult to accommodate
Interstate access	5	5	1	5	5	3	3	5	3	3	
Connection to transit	1	2	1	1	1	1	1	1	1	1	Unknown at this time whether transit could be accommodated to reduce congestion
Pedestrian connections	1	3	2	3	2	3	3	3	3	1	Ability to make pedestrian connection with downtown scores higher
maritime connections	4	2	1	5	2	2	5	2	3	1	use links to maritime elements scores best
Land Area to Facilitate Off-street parking	1	2	5	4	4	3	3	4	4	2	limited parking needs scores higher
Site size and configuration fits use	1	4	5	5	4	4	5	4	4	3	optimal sizing fits sites
<b>Subtotal</b>	<b>1.8</b>	<b>2.5</b>	<b>2.5</b>	<b>3.4</b>	<b>2.8</b>	<b>2.5</b>	<b>3.0</b>	<b>2.9</b>	<b>2.6</b>	<b>1.9</b>	

comments on physical	traffic impacts could be significant; critical mass needed may not fit on site	strong contender by no maritime links	no reasons to be located near interstate	has opportunity to spark local business, attract tourists and strong links to maritime	if, if this happens, best in the new jobs and may spark more downtown office growth	waterfront privatization is an issue	good for waterfront but demand but take significant time to develop	needs commitment form educational players	office market weak and privatization of waterfront is an issue	no real reason for being in this location	
<b>Planning</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	
Integration into City and link to downtown	1	3	3	5	4	3	5	4	3	2	blending
Neighborhood concerns	1	4	3	5	5	3	5	5	3	3	activity and crime prevention
Connection/ Potential open space/green areas	1	3	5	4	2	2	4	1	2	1	connections to parks and water
Image ability/asset to City/aesthetics	3	3	3	5	3	3	4	3	3	1	sets right image and tone
Proximity to Downtown uses	3	3	1	3	3	3	3	3	3	3	
Visibility	5	5	1	3	2	2	3	2	2	2	gateway enhancement
Synergy with adjacent properties & uses	1	5	3	4	4	3	4	4	4	2	1
Enhance tourism & visitor experience	2	4	1	5	2	2	5	2	2	1	gateway and waterfront
Land availability	1	3	5	5	4	4	5	3	3	2	right sized
Architectural heritage	1	2	2	5	2	1	5	2	3	1	preserves any sig. buildings
<b>Subtotal</b>	<b>1.9</b>	<b>3.5</b>	<b>2.7</b>	<b>4.4</b>	<b>3.1</b>	<b>2.6</b>	<b>4.3</b>	<b>2.9</b>	<b>2.6</b>	<b>1.7</b>	
comments on planning	While this use appears to be tourism oriented, over 70% of visitor to Turning Stone are local plus there are major negative impacts related to crime and addiction in an already struggling area	this is a high impact, complementary service use that could enhance tourism and quality of life	low impact, low cost, with some benefits	jobs, tourism, culture and authentic	jobs but may not need this site to be successful	while populates the area, it may not be the highest and best use	Tourism and major link to maritime is key asset	educational support is needed but not necessarily on this site	fits with concept of downtown core but does not need to be on this site	low population and impacts to traffic and no need to be located here	
<b>Total Ranking</b>	<b>2.2</b>	<b>3.3</b>	<b>2.3</b>	<b>4.1</b>	<b>3.2</b>	<b>2.6</b>	<b>3.8</b>	<b>3.1</b>	<b>2.7</b>	<b>1.8</b>	
	1. Family Resort Casino Inc. hotel and amenities	2. Year Round major sports/entertainment Destination Center	3. City Sports Park (outdoor venue)	4. Year round mixed use Farmers market and craft destination retail center	5. R&D Park--linked to SUNY	6. Mixed-Use Housing Development--affordable housing and amenities plus retail	7. Eco Tourism and canal tourism center--Inc. boaters services, retail, event plaza	8. Education and cultural zone (Comm. College linked to industry)--including CC expansion with departments catering to business clusters plus waterfront history museum	9. Office/ retail mixed use development--live work lofts	10. Health Care offices/clinic/ senior center	5 = highest 1 = lowest

# Final Report

THE WILLIAMS GROUP REAL ESTATE ADVISORS, LLC

For

City of Rome, NY

Department of Community & Economic  
Development

And CT Male Associates, Latham, NY

July 31, 2017



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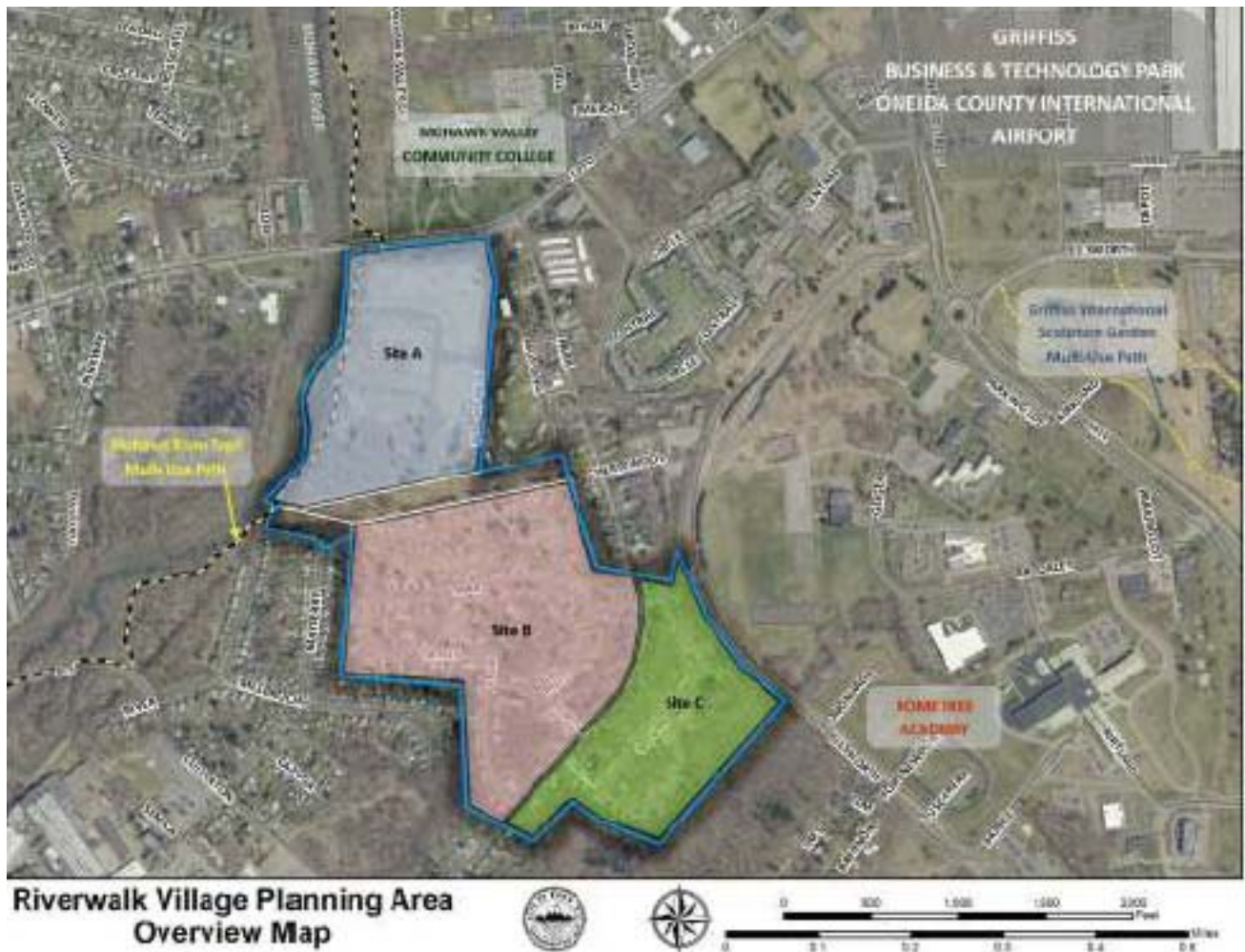
### **APPENDIX**

- Interviews
- List of Figures
- Caveat and Limiting Conditions
- Testing Matrix (separate attachment)

## Executive Summary

### Understanding of the Situation

The City of Rome is seeking a Master Plan and Generic Environmental Impact Statement ("GEIS") for the revitalization and redevelopment of the former Woodhaven and Wright Park Manor sites ("Woodhaven Site") in the City of Rome located in upstate New York. The project area sits in context to the Griffiss Business & Technology Park ("GBTP") as well as East Rome. According to the Riverwalk Village Planning Area Map, there are three sites labeled A, B and C. Site A was a former public housing complex that now includes the Mohawk River Trail. All structures on Site A have been demolished. Sites B and C contain 140 structures that have been vacant for two decades and all structures are recommended for demolition. The Woodhaven Site or the Subject site, totals approximately 110 acres.



### Goals and Objectives:

The overall strategy is to develop an implementation plan to revitalize the Woodhaven Site into a sustainable and attractive mixed-use development. The goal of the market analysis is to assist with the plan by developing a market supportable real estate program that includes sustainable mixed-use and advances smart growth principles including mix of land uses, range of housing opportunities, and is cost effective while encouraging community and stakeholder collaboration. The goal for the plan program is to create unique real estate opportunities, and attract a 21<sup>st</sup> Century work force while leveraging natural, cultural and historic resources specifically the Mohawk River Trail, Rome's urban forest and the historic Downtown Rome.

To assist with the objectives, the economics, demographics and real estate markets



were analyzed to identify a range of market supportable real estate options/opportunities to meet the objectives for the Woodhaven-Riverwalk Revitalization Site.

### **Approach:**

The economic, demographic and market analysis was developed to provide a report that identifies supply and demand, financial viability and social economic impact of development alternatives and to develop a program that has complimentary market support.

### **Overview of Market Findings:**

#### ***Economic Findings:***

Overall the regional economy of Utica-Rome is growing, but lags behind the State of New York and the United States. According to the New York State Department of Labor, eight of the thirteen metro areas in the State of New York added private sector jobs over the last year (February 2016 to February 2017) at a faster pace than Utica-Rome. While growth is slow, it is a much brighter outlook for the region. The Mohawk Valley saw post war economic climate peak in the 1960's but it was followed by a steady decline with the exodus of manufacturing jobs, which were the staple of the economy. Fast forward to 2015, Mohawk Valley received a \$50Million set aside for regional projects to be determined with the objective to provide economic boost by building real estate, or educating the workforce to attract future employers with the targets being STEM, agribusiness and tourism.

The most significant recent addition to the local and regional economy of the Valley is the Marcy Nanocenter. While some recent job additions have not come to fruition, in the long term, it is expected that almost 5,000 jobs will be created in this industry.

Outside of the local casinos, the other major employment center of interest is the Griffis Business and Technology Park ("GBTP") which recaptured 4,500 jobs from the Griffis Base closure but still has significant growth opportunities, both in terms of actual space and job creation options, which could one day include the possible opening of the airport to commercial traffic.

The Woodhaven Site has close physical proximity and strong synergies with the GBTP. There are many engineering and tech job opportunities at GBTP but the inventory of housing to match the workforce is missing. Many of the highest salaried jobs are located here.

As such, there is an opportunity for new development at the Woodhaven Site to provide housing support to GBTP as well as some of the eventual new workers to Marcy. There are also some small and mid-sized commercial opportunities such as Makerspace and Co-working space that could leverage the jobs created at multiple locations by supporting innovation and incubation of industry.

Agribusiness combined with tourism is also something that the Woodhaven Site needs to consider. NYS has established the craft beer and beverages trails to promote tourism and local crafts. This commercial/economic potential can be converted to a real estate use that could be potentially complimentary to other program uses for the Woodhaven plan.

While the local Casinos are more regional in draw, they can provide tourism economic impact to Rome in a positive way. While hotels are generally supported by businesses, the casino overflow may support additional room demand. Retail and services that are positive for local residents also find support for additional square footage from visitors.

**Demographic Findings:** Overall, the demographics of the City of Rome as well as the region indicate a population that is on a slight decline but with household income that is approximately the same as the US averages. Again, where there is major disparity and limitations on economic development that are noticeable in terms of education with the local and regional population coming up short in terms of bachelor and higher degrees. While recent history and the decline in manufacturing may have signaled young and educated populations to leave the area, the Marcy and GBTP workforce hubs need the educated individuals. **The highly needed professional degrees demanded by most new technology jobs may require an influx of more educated people to the area if the job market grows in areas such as advanced manufacturing, tech-centers, tech-logistics, government unmanned aircraft system ("UAS") and flight systems.**

Once again, the opportunity appears to be in the development of housing and amenities that would be attractive to this educated workforce that may be living outside

of Rome where there may be interesting housing stock with urban and hip amenities.

Retail demographics for development is the analysis of the households, incomes and the overall amount of retail that is supported based on various driving distances from the Woodhaven site. Based on an estimated capture of spending income, this specialized demographic analysis provided support for additional retail at the Woodhaven site of up to 37,000 SF. This analysis does not suggest the type of retail, just the inventory.

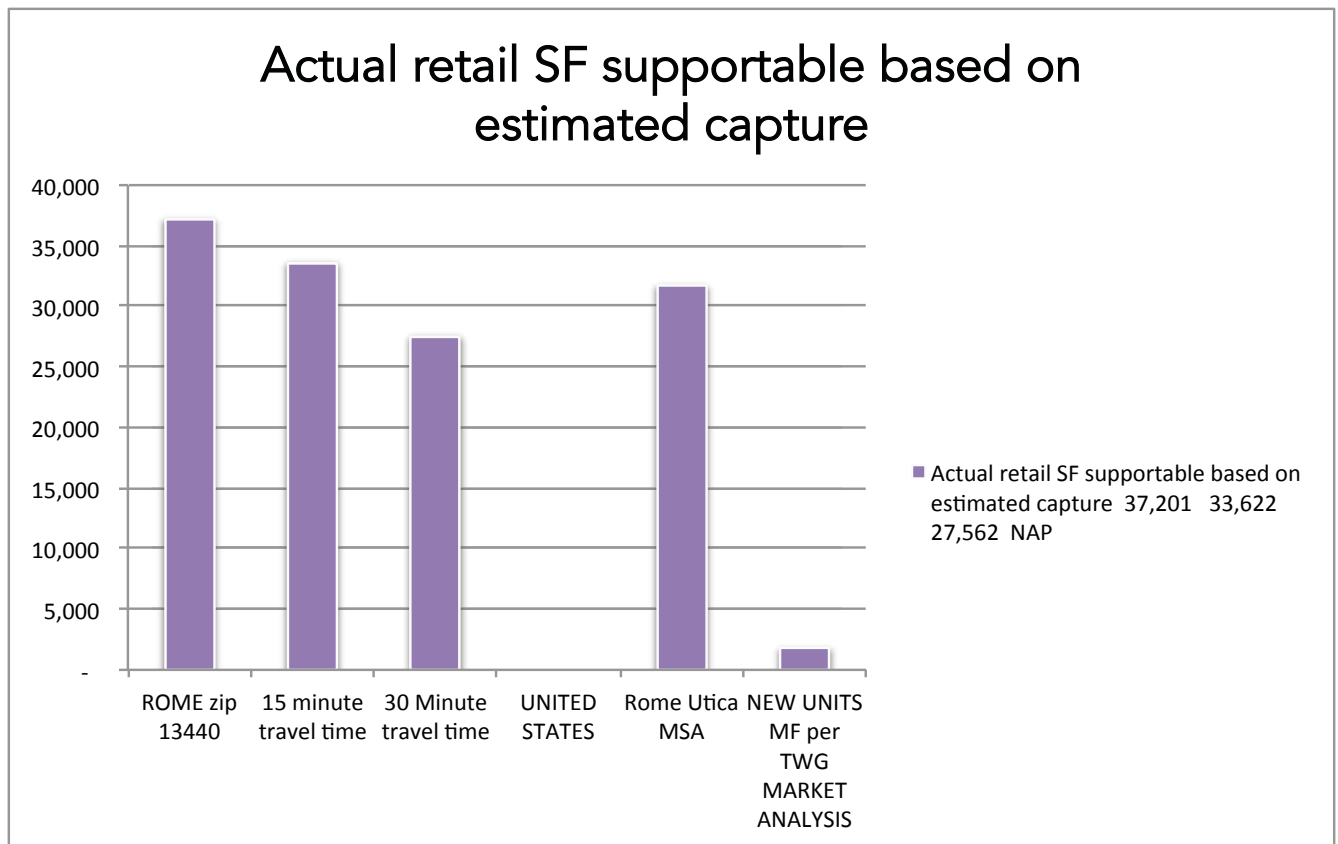


Figure 1: Retail demographics, with data provided by Nielsen Claritas

**Real Estate Findings:** In terms of real estate, the market data analysis suggests potential for additional product that includes the multi-family housing stock. This real estate category has the most real estate market data support of all real estate uses and is uniquely positioned to support economic development by adding inventory to support regional job creation.

**Multi-family:** There are two major sectors to residential, multi-family rental apartments



and single family/townhomes. Overall, the multi-family apartment rental is the most in demand nationwide and appeals to a demographic that Rome needs to attract, young college graduates and Millennials. Empty nesters are also a demand generator of the same products. The existing supply is very low on new, amenity rich, multi-family units. Demographics support new build. Meeting the needs of jobs created at Marcy and GBTP also supports new build out. In terms of existing supply, most of the existing supply is single family residential, and while older in stock, it is not the supply that is appropriate for a more commercial location, as Woodhaven, and will require significant infrastructure without the density to create economic development or support of significant retail. Therefore, the findings support at least 150 units of upscale amenity rich apartments, primarily based on demographic (population) and workforce capture and affordability, phased over time and another 50 clustered townhouses that would appeal primarily to the empty nesters and young families.

However, there is an issue that may be slowing housing and other development in Rome, and that is the higher property tax rate compared to neighboring towns. As such, many new multi-family developments are being built outside of the City line. In 2015, it was voted to freeze rates, with outside city mill rates at 13.37 per \$1,000 and inside rates at 20.07<sup>1</sup>, which de-incentivizes new development in downtown. Clearly, as part of a new plan, some type of additional incentive structure matched to new and desired real estate should be considered. It should be recognized that there are some as of right incentives in place including the STAR program for existing homeowners (partial exemption from school taxes) and a senior's exemption under stated Real Property Law Section 425. There are also partial exemptions for 5 years and 10 years respectively for construction in a ESD or an Empire Zone under section 485 P and E. It was unclear if Woodhaven would benefit from these last 2 exemptions. However new MF housing may be eligible for sec 485-l exemptions, which are similar to STAR, but include school, city and county taxes.

Single Family Housing: Single family housing is highest in terms of existing inventory. The product requires the most land and yields the least number of households per acre. As such, in terms of meeting the demand of empty nesters and older households that are downsizing, the townhouse model is more favorable in terms of creating density and economic development while still meeting the desirability for a "single family" unit. Patio homes are a consideration for the older population as they offer one-level living,

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<sup>1</sup> [Ocgov.net/real property](http://Ocgov.net/real%20property)

but do not yield the density of the townhouse.

**Senior Housing:** Senior housing is a broad category that includes independent housing, assisted housing, and continual care. In terms of independent and semi-independent housing, this market was considered. However, the affordability of the product and the demographics for the Rome submarket are not in synch. Most Rome demographics over 65 years do not match the cost structure of this housing (especially the single family model) and the high property taxes adds to creating a very high cost structure. Therefore, if the plan includes independent or semi-independent over 65 housing, it should be dense, as in a multi-family product to lower costs. Government financing assistance including low income housing tax credits, and lower cost government financing may be a means to include senior housing as part of the plan.

**Hospitality:** Based on the trends in the market and local ADR and occupancy rates, a new upscale extended stay hotel in close proximity to GBTP would be in demand in the range of 100 keys and with plenty of amenities including conferencing, pool, restaurant, fitness and access to trails and shuttles to GBTP.

**Retail space:** Retail real estate is interesting in terms of market support. Based on the demographic data, an estimated 27,000 to 37,000 SF of retail is supportable based on spending income. With an additional analysis of spending leakage, results suggested that there are certain unique categories that could be considered if programmed not to compete head on with the typical mall retail. An indoor/outdoor all season, large-scale farmers' market with specialty food and restaurants would be the most highly recommended. Convenience retail is needed to support the residential but also needed to create an active 24-hour environment , which is crucial. Given Rome's proximity to the Beer Trail and even wine trails, there could be a linkage between local pubs, grills and the State support of this unique and regional industry here in Rome. Nightlife, restaurant and pubs on site are essential ingredients to support the residents, and create a draw for visitors.

**Commercial space:** Office and R&D has some market support but clearly would be in direct competition to available space at GBTP where there is already significant R&D and office clustering. Therefore, no office or R&D is recommended for the Woodhaven site, except for Makerspace (linked to the local high school and community colleges) and Co-working space, as an office attraction for skilled workers and as a multi-family amenity. This space is in the range of 3,500 square feet each.

**Other:** In addition to the market-supported real estate, it is recommended that event generating uses be a supplement, such as a year round farmer's market. According to the city website, at this time, only a weekly farmers market is in use. A year-round permanent farmers market would be suggested as a way of generating visitation, and the market would appeal to the same residential audience that is being suggested for the Woodhaven site.

Other uses may also be complimentary such a trails, parks, and active recreational uses. While these uses are not part of a real estate analysis, they are amenities and complimentary to housing, retail amenities and commercial and can create an attraction on their own and will add value to the abutting real estate.

**Conclusion:** To compliment the discourse related to real estate supported by market and economics, two (2) distinct deliverables (see Appendix) were developed to aid the planning process. First, a summary program for the Woodhaven site arrayed by Live-Work-Play to distinguish between the residential market supported elements, the commercial real estate elements and the recreational amenities. The second matrix deliverable is an Options Testing Matrix which scores and ranks various themed programs by planning criteria, market criteria and other essential such as transportation, for example. This matrix was used to assist with the development of a short list of real estate program uses based on input from the public and stakeholders. The results strongly supported smart-growth market supportable uses and yielded low scores for other uses such as single-family housing, large-scale sports facilities and other considerations.

**Comparables for Development:** Finally, development comparables were analyzed for success stories and considerations. The comparables were geographically all located on the East Coast from near Boston, Massachusetts in the north to Williamsburg, Virginia in the south. The overall findings were that the most successful developments combined smart growth principles and include a mix of housing with density to support on-site retail while having amenities and quality of fit and finishes to support a targeted workforce, and fill a gap in existing housing inventory. Most also include a park and trails and some commercial space depending on market demand.







## 1. Understanding of the Situation

The City of Rome is seeking a Master Plan and Generic Environmental Impact Statement (“GEIS”) for the revitalization and redevelopment of the former Woodhaven and Wright Park Manor sites (“Woodhaven Site”) in the City of Rome, located in upstate New York. The project area sits in context to the Griffiss Business & Technology Park (“GBTP”) as well as East Rome. According to the Riverwalk Village Planning Area Map, there are three sites labeled A, B and C. Site A was a former public housing complex that now includes the Mohawk River Trail. All structures on Site A have been demolished. Sites B and C contain 140 structures that have been vacant for two decades and all structures are recommended for demolition. The Woodhaven Site or the Subject site, totals approximately 110 acres.

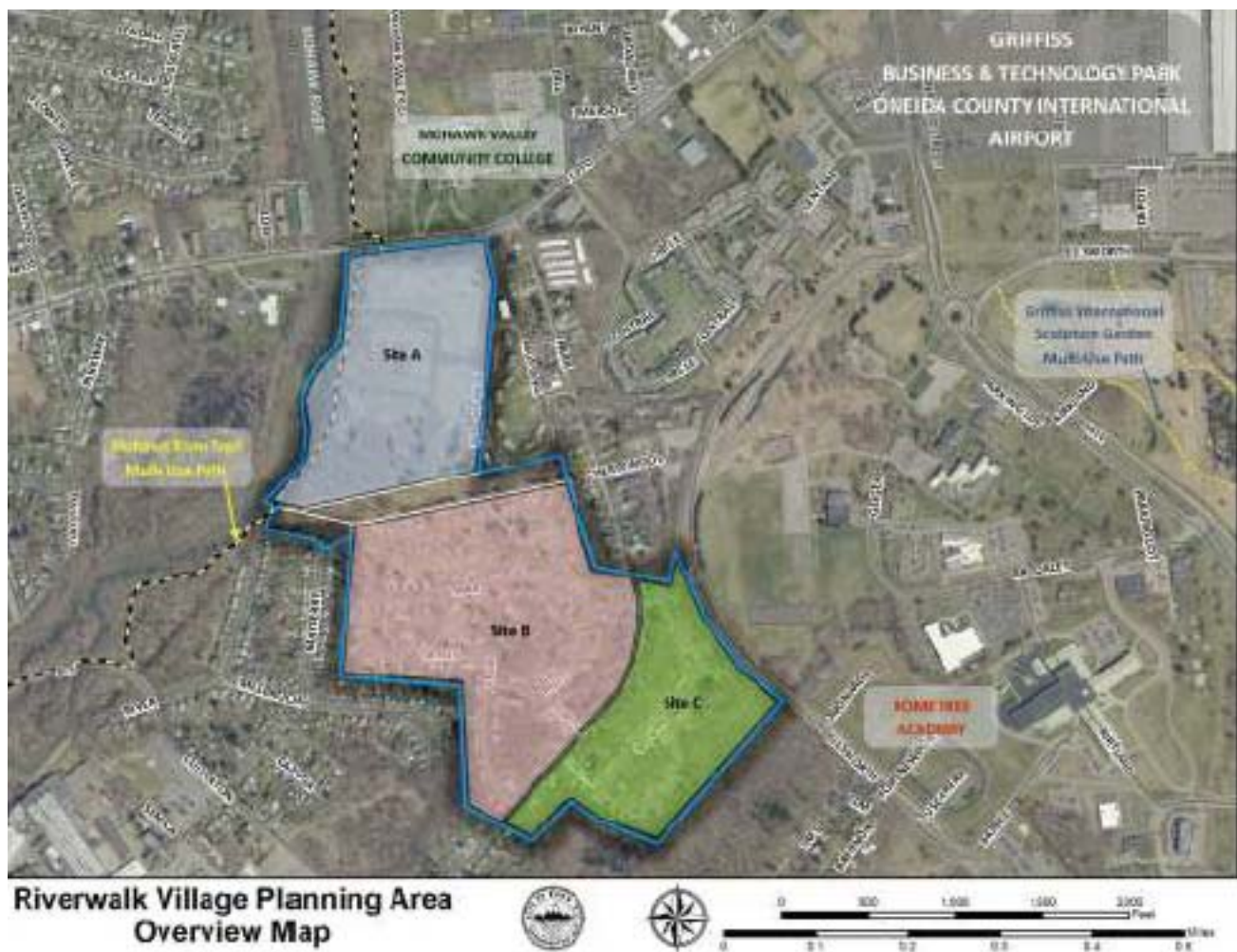


Figure 2: Planning Area—provided by City of Rome



## 2. Goals and Objectives

The overall strategy is to generate an implementation plan to revitalize the Woodhaven Site into a sustainable and attractive mixed-use development for this neighborhood, Woodhaven, in Rome, New York.

The goals include the elimination of blight and the development of a plan that offers sustainable mixed use revitalization that advances smart growth principles including a mix of land uses, a range of housing opportunities, is walkable, a strong sense of place, transportation choices, open space and is cost effective while encouraging community and stakeholder collaboration. The goal is for the development plan to align with regional strategies and create unique real estate and attract a 21<sup>st</sup> century work force while leveraging natural, cultural and historic resources - specifically the Mohawk River Trail, Rome's urban forest and the historic Downtown Rome.

To assist with the objectives, the economics, demographics and real estate markets were analyzed to identify a range of market supportable real estate options/opportunities that would complement the City of Rome's goals for the Woodhaven Site. Also issues were identified that need to be addressed and mitigated in order to support positive economic and real estate development. To that end, a top-down market analysis was performed that analyzes economics and real estate from the large market area then drills down to the sub-market where development is expected to occur.

The Williams Group Real Estate Advisors ("TWG"), as part of a team with C.T. Male, was asked to expand upon the data and information already assembled in the Downtown Rome & Erie Boulevard Brownfield Opportunity Area projects, so we have read and only as we deemed appropriate either updated or extracted data and findings found in the following reports prepared by Camoin Associates:

- *Real Estate Market Analysis: Erie Boulevard Brownfield Opportunity Area & the City of Rome*, November 2016
- *Understanding the Impacts in Rome of the Marcy Nanocenter Project*, September 2016
- *Medical Office Building Market Feasibility Analysis* Memorandum, November 11, 2016
- *Rome Turney Site – Financial Pro Forma Analysis* Memorandum, November 2016
- *Rod Mill Site – Financial Pro Forma Analysis*, Memorandum, November 2016
- *Strategic Site Financial Feasibility*, Undated

There were additional documents provided by the City of Rome regarding the Downtown Rome & Erie Boulevard Brownfield Opportunity Area, but they were deemed too old to be considered in our analysis.

Scope and Approach: The deliverable of the economic and market analysis is to provide a report that identifies supply and demand, economic viability and social economic impact of development alternatives.

### 3. Economics for Development

#### State of New York

The overall economy of the State of New York is strong. Private sector jobs have increased to their highest level while unemployment is at its lowest. The New York Department of Labor stated that in February 2017, private sector jobs in the State climbed to a record high level of 8,035,600. Over one million private sector jobs (seasonally adjusted) have steadily been added since the end of the recession in the latter part of 2009.

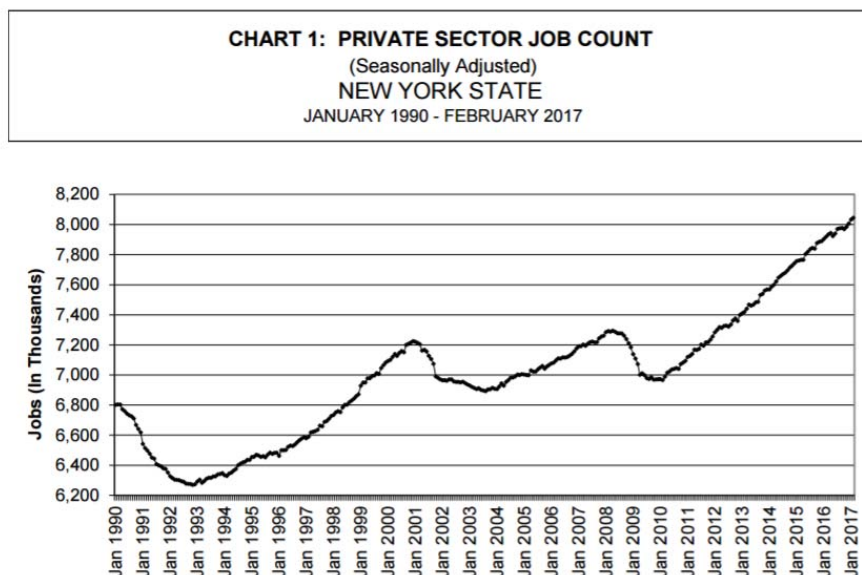


Figure 3: Private Sector Jobs Count, New York State

Source: NY Department of Labor; <https://www.labor.ny.gov/stats/pressreleases/overview.pdf>

An overview of the State of New York shows the percent change in Total Nonfarm and Private Sector Jobs by Area from February 2016 to February 2017<sup>2</sup>. The Utica-Rome Metro area, which includes the counties of Oneida and Herkimer, saw a change of 0.7% for Nonfarm (Private Sector and Government) Jobs, growing at a rate that is slower than the State of New York of 1.4% and the United States of 1.7%. Similarly, Utica-Rome showed a 1.1 % increase over the same time frame for just Private Sector Jobs, growing at a rate that is also slower than the State

<sup>2</sup> labor.ny.gov, Labor Statistics for the Mohawk Valley Region



of New York of 1.6% and the United States of 1.8%.

**Change in Total Nonfarm and Private Sector Jobs  
February 2016 – February 2017**

	Change in Total Nonfarm Jobs: (private sector + government)		Change in Private Sector Jobs:	
	Net	%	Net	%
<b>United States</b>	+2,352,000	+1.7%	+2,144,000	+1.8%
<b>New York State</b>	+130,900	+1.4%	+121,100	+1.6%
Albany-Schenectady-Troy	+7,200	+1.6%	+5,800	+1.6%
Binghamton	+500	+0.5%	+300	+0.4%
Buffalo-Niagara Falls	+7,000	+1.3%	+5,400	+1.2%
Dutchess-Putnam	-200	-0.1%	-200	-0.2%
Elmira	-600	-1.6%	-600	-2.0%
Glens Falls	+1,500	+2.9%	+900	+2.1%
Ithaca	+1,600	+2.5%	+1,700	+3.1%
Kingston	+600	+1.0%	+500	+1.1%
Nassau-Suffolk	+30,800	+2.4%	+27,100	+2.5%
New York City	+63,600	+1.5%	+62,000	+1.7%
Orange-Rockland-Westchester	+7,900	+1.1%	+6,500	+1.1%
Rochester	-1,400	-0.3%	-1,200	-0.3%
Syracuse	+3,700	+1.2%	+3,000	+1.2%
Utica-Rome	+900	+0.7%	+1,000	+1.1%
Watertown-Fort Drum	+700	+1.7%	+800	+2.8%
Non-metro Counties	+2,600	+0.5%	+3,400	+0.9%

Figure 4: Change in Total Nonfarm and Privates Sectors Jobs New York State

Source: New York Department of Labor; <https://labor.ny.gov/stats/pressreleases/pruistat.shtm>

An analysis of the Change in the Number of Nonfarm Jobs by Industry for the State of New York indicates that Education and Health Services jobs are the largest segment at 2,018,000 as of February 2017; followed by Trade, Transportation and Utilities at 1,549,000, and then Government at 1,458,000. Education and Health Services as well as Professional and Business Services have shown the highest growth at over 3 percent between February 2016 to February 2017. On the other hand, Manufacturing has shown the largest loss averaging 2.7% for the same time frame.

According to the New York State Department of Labor, eight of the thirteen metro areas in the State of New York added private sector jobs over the last year (February 2016 to February 2017)

at a faster pace than Utica-Rome.

**Table 2. Number of Nonfarm Jobs By Industry  
New York State  
(In Thousands, Not Seasonally Adjusted)**

Industry	February 2017	February 2016 ( R )	Change to February 2017 from:	
			February 2016	
			Net	%
Total Nonfarm	9,353.9	9,223.0	130.9	1.4%
Total Private	7,895.3	7,774.2	121.1	1.6%
Goods Producing	783.8	795.0	-11.2	-1.4%
Natural Resources & Mining	4.5	4.5	0.0	0.0%
Construction	341.1	340.3	0.8	0.2%
Manufacturing	438.2	450.2	-12.0	-2.7%
Durable Goods	252.6	263.3	-10.7	-4.1%
Non-Durable Goods	185.6	186.9	-1.3	-0.7%
Service-Providing	8,570.1	8,428.0	142.1	1.7%
Trade, Transportation, and Utilities	1,549.2	1,544.5	4.7	0.3%
Wholesale Trade	337.6	337.8	-0.2	-0.1%
Retail Trade	923.8	921.6	2.2	0.2%
Transportation, Warehousing, and Utilities	287.8	285.1	2.7	0.9%
Information	266.6	261.8	4.8	1.8%
Financial Activities	707.4	706.6	0.8	0.1%
Professional and Business Services	1,299.5	1,257.4	42.1	3.3%
Education and Health Services	2,017.6	1,950.9	66.7	3.4%
Leisure and Hospitality	866.6	857.7	8.9	1.0%
Other Services	404.6	400.3	4.3	1.1%
Government	1,458.6	1,448.8	9.8	0.7%

Note: Data are subject to revision. R=Revised. Net and % changes based on rounded data.  
Source: New York State Department of Labor, Division of Research and Statistics, 518-457-3800.

*Figure 5: Number of Nonfarm Jobs by Industry, New York State*

Source: New York Department of Labor; <https://www.labor.ny.gov/stats/pressreleases/prtbjd.pdf>

Additionally, New York State's unemployment rate fell to 4.4% as of February 2017, the lowest it has been since 1976. If the City of New York is separated from the rest of the State, the unemployment rate of New York City is 4.3% and the remainder of New York State is 4.6%, both below the United States' unemployment rate of 4.7% as of February 2017.

Unemployment Rates (%)*			
	February 2017*	January 2017	February 2016
United States	4.7	4.8	4.9
New York State	4.4	4.6	4.9
New York City	4.3	4.5	5.3
NYS, outside NYC	4.6	4.6	4.5

\*Data are preliminary and subject to change, based on standard procedures outlined by the U.S. Bureau of Labor Statistics.

Figure 6: Unemployment Rates for New York State compared to the United States

Source: New York State Department of Labor; <https://labor.ny.gov/stats/pressreleases/pruistat.shtm>

## Mohawk Valley Region

The City of Rome is located in the Mohawk Valley; an area situated along the Erie Canal between Albany and Syracuse, and is comprised of six counties, including Fulton, Herkimer, Montgomery, Oneida, Otsego and Schoharie. Historically this region has successfully adapted with changing industry trends. Early manufacturing of textiles and leather gave way to defense manufacturing during World War I and II. Post war, manufacturing continued in radar, defense and consumer electronics, aerospace and machine tools. But after its climax in the 1960s, the Mohawk Valley saw a steady decline with the exodus of manufacturing jobs being outsourced or moving to lower-cost markets, and companies that dwindled as they could not stay at the forefront of their industries. As the manufacturers left, so did skilled and educated labor in search of more favorable employment opportunities, leaving the Mohawk Valley and specifically Rome. Some examples of loss include<sup>3</sup>:

- The Griffiss Air Force Base located in Rome was closed in 1995, losing 4,500 jobs.
- Lockheed Martin (formerly GE Aerospace) closed its location in Utica

The Mohawk Valley, as well as other regions in upstate New York, joined “The Rust Belt” given the evident decline in their economies and shrinking population with increase in urban decay, blight, contaminated land and abandoned industrial buildings. Fortunately, in 2015, the State of New York implemented the Upstate Revitalization Initiative (URI). Mohawk Valley obtained a \$50 Million set aside with objectives to boost the economy in the fastest manner, whether it be in building real estate or educating a work force, to attract future employers. However, the

<sup>3</sup> Source: *Sparkling Transformation Mohawk Valley REDC Upstate Revitalization Investment Prospectus*



exact fund distribution has yet to be determined. The targeted industries include STEM intensive industries, Agribusiness and Tourism.<sup>4</sup>

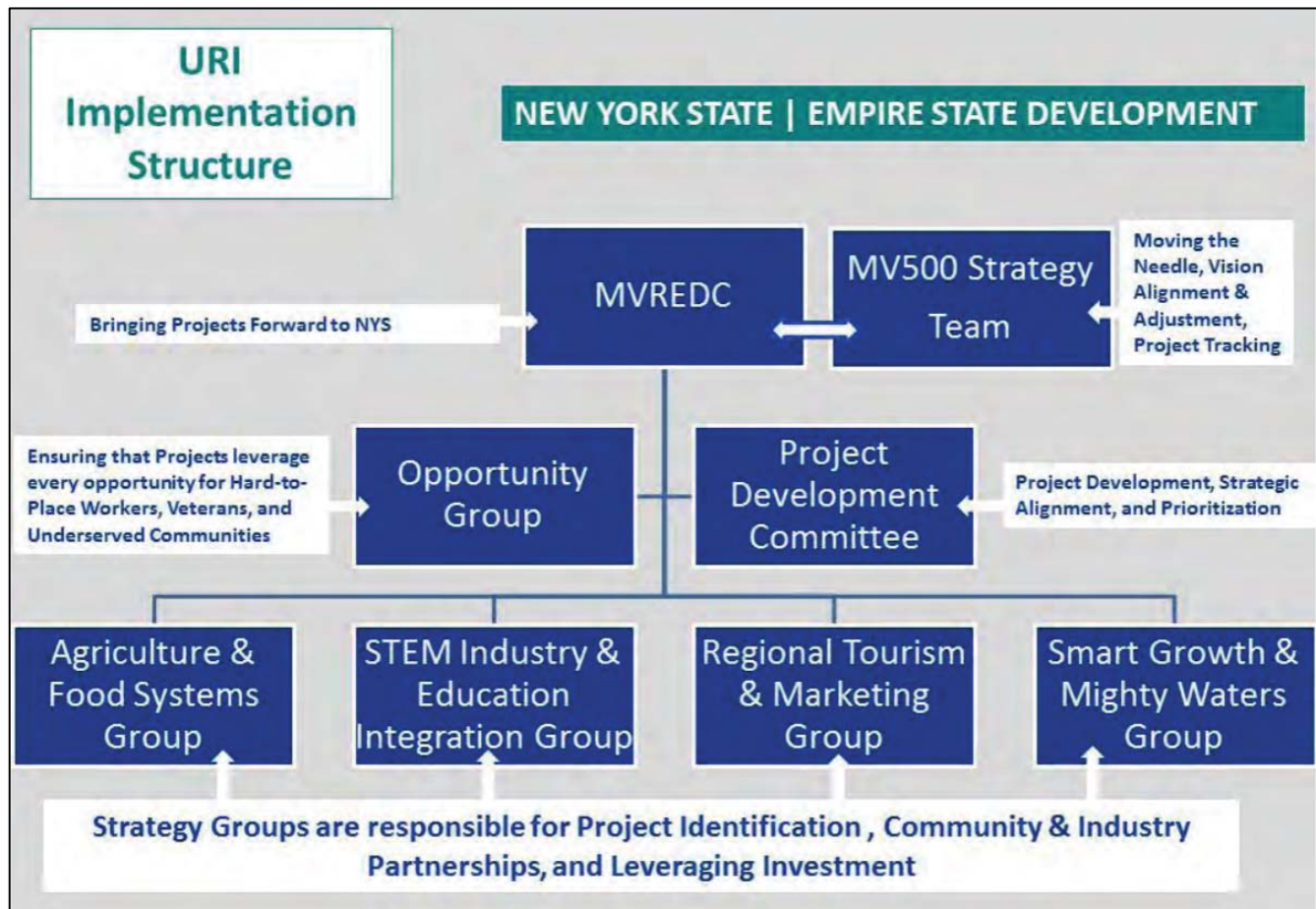


Figure 7: Organizational and responsibility structure for Community Partnerships and Investment in NYS  
Source: Sparking Transformation Mohawk Valley REDC Upstate Revitalization Investment Prospectus;  
[https://www.ny.gov/sites/ny.gov/files/atoms/files/MVREDC\\_URI\\_FinalPlan.pdf](https://www.ny.gov/sites/ny.gov/files/atoms/files/MVREDC_URI_FinalPlan.pdf), p. 155

Other state-funded initiatives are also in place, so the opportunity for reinvigorating the economy of the Mohawk Valley does have support and backing.

### **STEM: Marcy Nanocenter**

The 450-acre Marcy Nanocenter site is the most significant STEM project in the Mohawk Valley

<sup>4</sup> Ibid

Region and in proximity to the City of Rome. The Nanocenter site, located approximately 15 miles southeast from the Woodhaven Site, is planned for three semiconductor facilities and is estimated to eventually add 4,000 to 5,000 direct jobs. In December 2016, AG ("AG"), an Austrian semiconductor fabrication company, decided to pull out of their commitment to build and occupy the center, but the infrastructure improvements continue so the site will be shovel ready. With its readiness and incentives funding available, the Nanocenter site will be an attractive alternative for technology firms searching for a place to build.<sup>5</sup> Adjacent is the Computer Chip Commercialization Center (Quad-C), which is expected to open May 2017. GE plans to start production in 2017 with a focus on advanced electronics packaging. An addition of 500 jobs in the next five years and 350 more by year ten is anticipated.<sup>6</sup> Danfoss Silicon Power has recently announced that it will be establishing a presence at Quad-C, in partnership with General Electric.<sup>7</sup>

### **AGRIBUSINESS AND AGRITOURISM:**

An initiative of New York State is to promote visitor spending in the Mohawk Valley Region by encouraging visitors to experience craft beers from the agricultural ingredients to the sampling of the product, as one aspect of its Agribusiness, and in this case, what's termed as Agritourism.<sup>8</sup> Specifically Brew Central, the marketing campaign, is to increase awareness of craft brews in the Mohawk Valley Region as well as hard cider, spirits and wine.<sup>9</sup> Although this is not a stated focus of the City of Rome, one micro-brewery, Copper City Brewery, opened at 1111 Oneida Street in Rome in the Fall 2016<sup>10</sup>, is already located on the New York Beer Trail<sup>11</sup> and could be a starting place to increase tourism to the area, alongside other breweries in Utica. The Adirondack Craft Beverage Trail is primarily focused on micro-breweries located up and down along the Hudson River to the east of Rome<sup>12</sup> and the Finger Lakes Beer Trail is to the west.<sup>13</sup> A linkage between these two established trails could include breweries located in Rome and Utica as a way to increase visitation to the area. These types of establishments are also of interest to the Millennial demographic group.

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<sup>5</sup> Source: Mohawk Valley Edge 2016 Annual Report and Marcy Nanocenter Website (<http://marcynanocenter.com/>)

<sup>6</sup> Source: Observer-Dispatch, *Quad-C Getting Close to Completion*, March 8, 2017

<sup>7</sup> Source: Solar Industry, *Danfoss To Set Up Power Module Shop in N.Y., Partner with GE*, March 28, 2017

<sup>8</sup> Source: *Sparkling Transformation* Mohawk Valley REDC Upstate Revitalization Investment Prospectus, pp. 77-80

<sup>9</sup> Ibid

<sup>10</sup> Source: Rome Sentinel, *Craft Brewers set to Open Shop in Rome*, March 28, 2016

<sup>11</sup> Source: The New York State Beer Trail (<http://newyorkcraftbeer.com>)

<sup>12</sup> Source: The Adirondack Craft Beverage Trail and Map, <http://adkcrafbbev.com/>

<sup>13</sup> Source: The Finger Lakes Beer Trail, <http://fingerlakesbeertrail.com/content/>

## **TOURISM:**

Rome is located in the foothills of the Adirondacks, in Oneida County. Oneida County Tourism does a thorough job at advertising the visitation and destination opportunities for the region. In the winter, snowmobiling and trails are very popular recreational activities in the area whereas activities such as outdoor hiking and hunting are four-season sports. There are also a number of nearby trails including at the Delta Lake State Park and the Erie Canalway Trail which will be connected by the Mohawk River Trail now entering Phase II of III.

The Erie Canal has significant destination potential but has yet to fully reach its tourism and visitation possibilities due to the overall length of the canal itself and in many cases, either the lack of access or the hindrance of obsolete industry or blighted structures near the canal. In some way or form, the estimated 300-mile Erie Canalway Trail (plans for the State to complete the full trail were announced recently) extends from Albany to the southeast to Buffalo to the west, generally following the Erie Canal.<sup>14</sup> This trail is less than 1.5 miles from Woodhaven Site and offers a potential unique amenity to local residents and businesses. Currently, the full potential of outdoors offering, trails and natural assets is not being fully exploited for tourism in Rome. Also along the canal is Fort Stanwix, a national register historic place, which was built in 1758 and is located in Rome. It recently posted an annual visitation of 86,000 visitors providing \$6.4 Million in local economic benefit.<sup>15</sup>

## **Casino Tourism**

Much effort appears to be focused on gaming as a major destination in the Mohawk Valley Region, and specifically, the Utica-Rome vicinity. It is reported in 2006, from a number of sources, including High Beam Research (Dec 2006), that local casinos attracted 4.5 million visitors, most of who come from the surrounding areas, typically within a 75 miles drive time<sup>16</sup>. Two major casino attractions are located in Vernon, NY and are in close proximity to Rome: 1) Turning Stone Casino and Resort ("Turning Stone") (15 miles southwest of the Woodhaven Site) and 2) Vernon Downs Casino Hotel which also includes Vernon Downs Harness Racing ("Vernon Downs") (16 miles southwest of the Woodhaven Site). According to Union Gaming Analysis (June 2014), Turning Stone provided 6,100 local jobs and has approximately 23% of

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<sup>14</sup> Source: New York State Canal Corporation (<http://www.canals.ny.gov/trails/about.html>)

<sup>15</sup> [www.nps.gov/fost/index.htm](http://www.nps.gov/fost/index.htm)

<sup>16</sup> Union Gaming Analytics, Final Report, June 2014 and Gaming Market Assessment, June 6, 2014, [www.gaming.ny.gov](http://www.gaming.ny.gov)



the gaming market within two hours. It is the dominant player with revenues of \$280M and is the leading local visitor attraction. Turning Stone is primarily slots and tables. Vernon Downs market share is slipping and is somewhere between 2% and 5% and provides primarily racing venues. Compared to Turning Stone, it is struggling with revenues around \$44Million in 2013<sup>17</sup>. In April 2017, Vernon Downs, which is operating at a loss of \$150,000 per month announced it is not opening its race track venue as the track is not profitable and the resort is hoping the State of New York will offer some relief, although that has not yet been the case.<sup>18</sup>

Both Turning Stone and Vernon Downs are regional market casinos and gaming destinations with almost all of the visitors from within a two-hour drive time. Visitors to these destinations typically stay at the accompanying hotels at the respective properties and local Vernon market, but in some cases visitors will stay in Rome when there are no rooms available in the Vernon hospitality market (termed “overflow demand”).

It has also been reported that the casinos have had financially better years but they are working on creating more of an attraction and a family destination with the addition of potential outlet malls and recreational activities as described in the next section. Nevertheless, while the tourism and casinos offer economic opportunities which may positively impact Rome and the region, it is expected that any type of proposed hospitality venue at the Woodhaven Site would only gain minimal occupancy overflow, as most activity and rooms stays will be at the casino hotel properties. A new hotel product at Woodhaven needs to support occupancy primarily based on business traveler usage, especially during weekdays and possibly casino overflow on the weekends.

### **Turning Stone Resort & Casino**

The most significant tourism hospitality venue in proximity to the City of Rome is the Turning Stone Resort & Casino located in Vernon, NY. The 125,000 square foot casino is adjacent to the 285-room Tower Hotel and offers amenities such as outdoor and indoor golf and tennis, nightly entertainment, etc. A \$20 million renovation is currently underway at the casino and hotel. Nearing completion, an estimated \$12 million is being spent to upgrade the casino including six new casual fast-food restaurants in the Food Hall. Another \$8 million will be spent to renovate all 285 rooms at the Tower. The renovations are underway and not expected to be completed until 2018.

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<sup>17</sup> IBID

<sup>18</sup> Source: Blood Horse, *Harness Track Vernon Downs Feeling Pinch from Casinos*, April 13, 2017

Additionally, there is another plan for a \$400 million, 60-store retail indoor outlet mall being developed at the property. The outlets would include unique labels to the area, that have only been found in major urban centers such as New York and Los Angeles as well as entertainment such as a six-screen movie theatre and luxury bowling alley.<sup>19</sup> Partnering with the Oneida Indian Nation is the Gordon Group, the owners of the Turning Stone Resort & Casino, who are claimed to have delayed the construction from 2014 due partly to softness in the retail market. But as of August 2016, per the Observer-Dispatch, the Gordon Group was still pursuing the project and hoped to break ground by Spring 2017. The development is reported to add an estimated 1,100 retail jobs and 500 to 600 construction jobs.<sup>20</sup> Given the growing market share of Amazon and online shopping, the prospect for a large-scale retail may be at risk unless the retail is primarily focused on visitor entertainment. To date, there is no indication that construction of the outlets has begun.

The economic overview of casinos, and their associated hotels, is to enhance the understanding of visitation and hospitality market drivers in Rome. Generally, there are two hotel demand drivers, tourism and business. As such, the subsequent analysis of the hotel real estate market at the Woodhaven Site will focus primarily on business as a demand driver with minimal expected potential overflow for casino and tourism. Given the distance to the casinos at 16 miles, it is unlikely, except during a major event or seasonal overflow, that an analysis could rely on any significant occupancy from casinos to support a hotel. Therefore, the major analysis for hospitality will consider businesses occupancy and Rome-specific tourism demand.

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<sup>19</sup> Source: *Sparkling Transformation* Mohawk Valley REDC Upstate Revitalization Investment Prospectus p. 98 [https://www.ny.gov/sites/ny.gov/files/atoms/files/MVREDC\\_URI\\_FinalPlan.pdf](https://www.ny.gov/sites/ny.gov/files/atoms/files/MVREDC_URI_FinalPlan.pdf)

<sup>20</sup> Source: Oneida-Dispatch, *Turning Stone Outlets Still Envisioned*, August 23, 2016



Figure 8: Turning Stone Casino, Verona, NY

### **Rome and the Griffiss Business and Technology Park ("GBTP")**

The impetus for change in the City of Rome is centered around the adaptation of Griffiss Air Force Base into the Griffiss Business and Technology Park ("GBTP"). The speculation for an improved and vibrant economy in Rome has been based on the creation of jobs through new STEM employers and the expansion of its existing businesses. Within a few years of opening in 1995, GBTP has recaptured the 4,500 employees it lost from the Base closure but the expectation is that the GBTP has ample room to grow significantly more.<sup>21</sup>

GBTP is located less than one mile east of the Woodhaven Site, on the eastern side of Rome. GBTP is comprised of 3,500 acres that includes the Griffiss International Airport (also designated the Oneida County Airport), which offers customs at its newly constructed international terminal building. Although not open to commercial passengers, GBTP is unique in that it is easily accessed by air, highway, rail and canal to major trade destinations within the US and Canada. State Routes 825, 365, 46 and 49 connect GBTP to three interchanges on the

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<sup>21</sup> Source: [archive.defense.gov/brac/docs/oeabro02.pdf](http://archive.defense.gov/brac/docs/oeabro02.pdf) and [www.syracuse.com/news/index...drum\\_griffis\\_air\\_force\\_b.html](http://www.syracuse.com/news/index...drum_griffis_air_force_b.html)



New York Thruway, Interstate 90. Currently the final stretch of Route 825 nearing GBTP is being expanded into a four-lane highway to improve accessibility.<sup>22</sup>

GBTP is divided into seven development districts:<sup>23</sup>

1. Park Center: Location of the Air Force Research Laboratory, the largest employer at GBTP with approximately 1,200 employees, and other private sector companies (180 acres)
2. Technology Heights: High-tech industry and tenant space (100 acres)
3. Enterprise Way: Industry and Distribution with rail infrastructure (400 acres)
4. Campus Green: Conference, educational and training spaces (142 acres)
5. Skyline Summit: Executive Office Park (126 acres)
6. Mohawk Glen: 9-hole public golf course, health center and recreational facilities
7. Aviation Gateway: Griffiss International Airport including a 2.23-mile runway, 560,000 square yards' ramp space, landing systems, weather sensors, air traffic control center, and space for new hangars and warehouses and international terminal (1,656 acres)

Within GBTP, incentives are offered for relocation and expansion, including Empire Zone tax incentives, zoned sites for immediate development, small business development assistance and private/public sector cooperation.

As of December 2016, 79 businesses occupied GBTP, employing 5,784 workers.<sup>24</sup> Currently, GBTP has 401 acres available within seven distinct land parcels, ranging from 6 to 210 acres. Additionally, a total of 340,000 square feet are available within three existing commercial buildings, yet these properties are not located on the GBTP property.<sup>25</sup>

Based on conversations with representatives from the Griffiss Local Development Corp ("GLDC"), the park is unique relative to other business parks in the area as it offers amenities

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<sup>22</sup> Source: Rome Sentinel, *Work begins on \$8.85M expansion of Route 825 on Griffiss Park*, Sept. 17, 2016

<sup>23</sup> Source: Griffiss Business and Technology Park website (<http://www.griffissbusinesspark.com/>)

<sup>24</sup> Source: Mohawk Valley Edge, 2016 Annual Report, p. 6

<sup>25</sup> Source: Griffiss Business and Technology Park website (<http://www.griffissbusinesspark.com/>)

such as the pedestrian trail, beautiful sculptures, 9-hole golf course and overall care of the facility and grounds to make it feel more like a Google campus and be an attractive alternative to high-tech users.

Employment at GBTP has grown, but at a slower rate than expected. This data was confirmed by the GLDC as they indicated that business leads have been slow and companies relocating from outside of Rome have not committed to GBTP for a number of years. For example, in 2016, even though Kris Tech Wire chose to move into a new 45,000 sf facility at GBTP, they were originally located about one mile away in Rome, so no new net employment was gained in the City of Rome. Committed new projects for 2017 include new construction of a Stewart's Shops convenience store on 2 to 3 acres of the 25-acre site of Building 240 once the infrastructure is put in place with an interior access road. Building 240 was recently demolished and is located across from the Hampton Inn and adjacent to Mohawk Valley Community College ("MVCC"). State Route 825, which is the last stretch of two lanes, will be transformed into a 4-lane roadway as it is for the rest of its route, creating better access to GBTP. It is currently under construction. But the market is slow to draw commercial interest to GBTP. Many technology employers allow telecommuting so it may be unnecessary for companies to purchase, lease or develop a bricks and mortar space. GBTP is offering small suites for startup companies to rent space on flexible basis to allow businesses to get established and hopefully decide to move into larger spaces in the center. Of the six suites offered last July, five are currently occupied.<sup>26</sup>

GBTP's Griffiss International Airport was one of six national sites selected by the government to test unmanned aircraft systems ("UAS") under the direction of Northeast UAS Airspace Integration Research Alliance ("NUAIR"). On July 13, 2016, the U.S. Senate reauthorized the UAS test site designation for three more years. GBTP is capitalizing on this distinction by training students at MVCC to gain a degree in UAS technology and support the workforce needed. Griffiss has also installed a "Test Bed" range instrumentation system to support the development of a Sense and Avoid system. This capability enables Griffiss to have a competitive advantage over the other test sites, with hopes to ensure its continued designation.<sup>27</sup> The Deputy Commissioner of the airport was unable to provide detailed information on further status or future of the UAS or other airport-related initiatives given the proprietary nature of that information. However, he did state that the facilities relating to the

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<sup>26</sup> Source: Frank Acruri, Senior Vice President, Mohawk Edge; and Griffiss Land Development Corp, 2016 GLDC Year in Review (<http://www.callmohawkvalleyhome.org/documents/1477.pdf>)

<sup>27</sup> Source: Mohawk Valley Edge, 2016 Annual Report, p. 7

air systems were fully occupied.<sup>28</sup>

## Number of Employees at Griffiss Business and Technology Park

Year	Number of Employees
2016	5,784
2015	5,700
2014	5,720
2013	5,800
2012	6,200
2011	5,800
2010	5,500

Figure 9: Number of Employees at GBTP 2010-2016

Source: Griffith Land Development Corp Annual Reports for the years 2010-2016

Many of the businesses located at GBTP offer some of the highest salaries in Rome. For example, Airforce Laboratories which is the largest tenant at GBTP issued a Fiscal Year 2015 Economic Impact Analysis Report. In the report, it was stated that Airforce Laboratories employed 1,219 total personnel (Appropriated Fund Military, Appropriated Fund Civilians, and On-Site Contractors) who averaged an annual payroll of \$114,500 per person.<sup>29</sup> Similarly, many of the technology-related positions of employees at GBTP have high paying salaries so, in turn, have a higher probability of being able to afford more expensive housing. Perusing internet sites such as indeed.com for job listings in Rome yielded ample listings for computer and technical positions offering strong salaries. Capturing some of these higher paid workers with targeted housing and amenities is one of the real estate market goals for Woodhaven.

## 5. Demographics for Development

Overall, there are two main goals for the demographic analysis:

1. To determine the demographic snapshot of Rome, NY and how demographics affect

<sup>28</sup> Source: Chad Lawrence, Deputy Commissioner, Oneida County Airport

<sup>29</sup> Source: Airforce Laboratories, FY 2015, Information Directorate Economic Impact Analysis



development; and

2. To analyze the demographics of the larger market to the Rome sub-market and determine how demographics affect development, including the pool of available labor to support local business.

The analysis of Rome demographics was based on three geographic areas surrounding the Woodhaven Site. They include Rome's zip code and both a 15-minute and 30-minute drive time analysis area as pictured in Figures 10 through 12:<sup>30</sup>

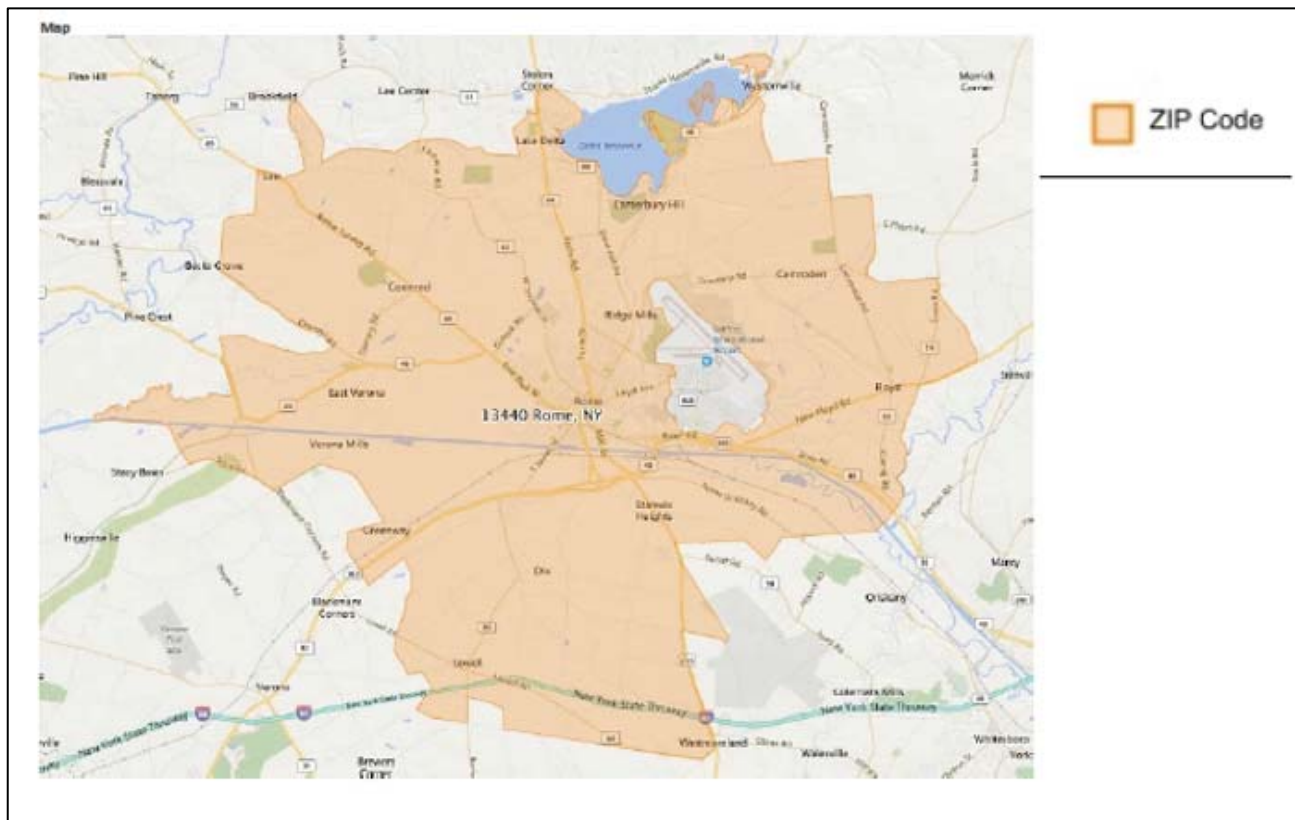


Figure 10: Map of Demographic Analysis Rome Zip Code

Source: Claritas, March 2017

<sup>30</sup> Nielsen/Clarita's 2017, Area Map for zip code, 15-minute and 30-minute radii used in demographic data download (February 2017)

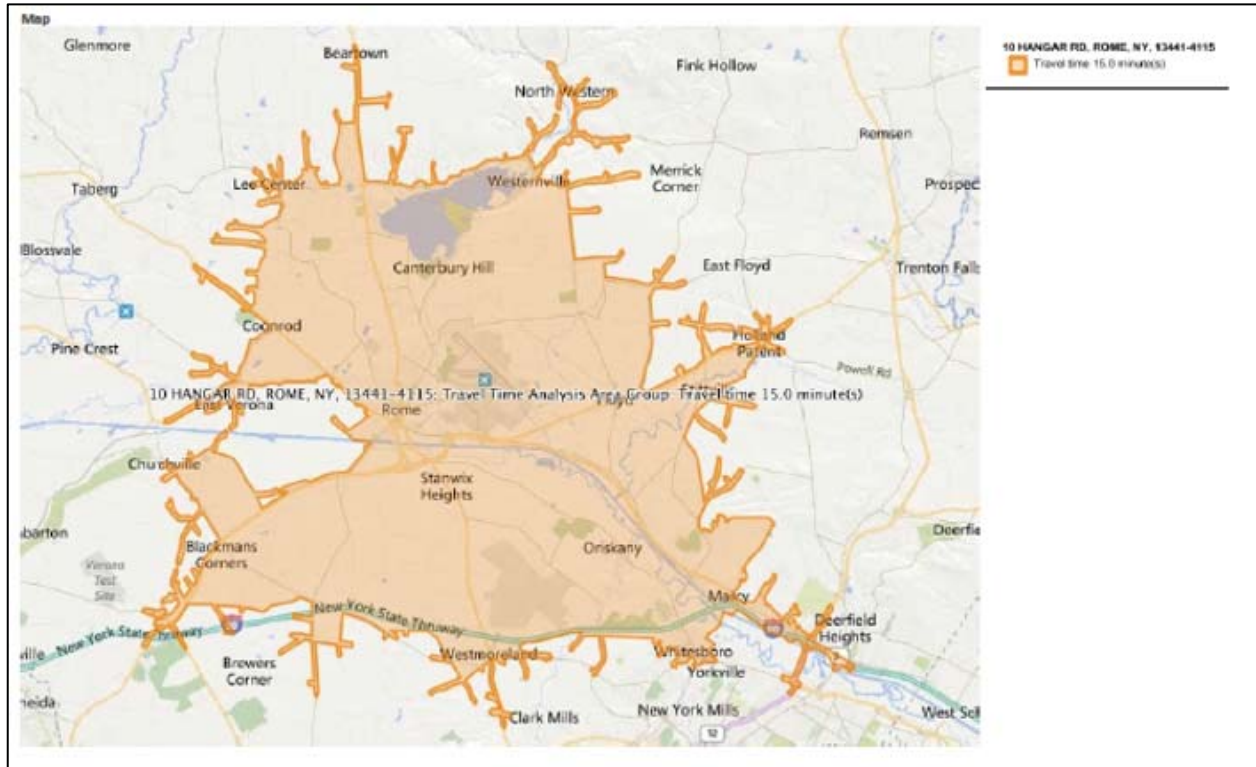


Figure 11: Demographic Analysis Map, 15-minute Drive Time

Source: Claritas, March 2017

## Rome 30-Minute Drive Time Analysis Area

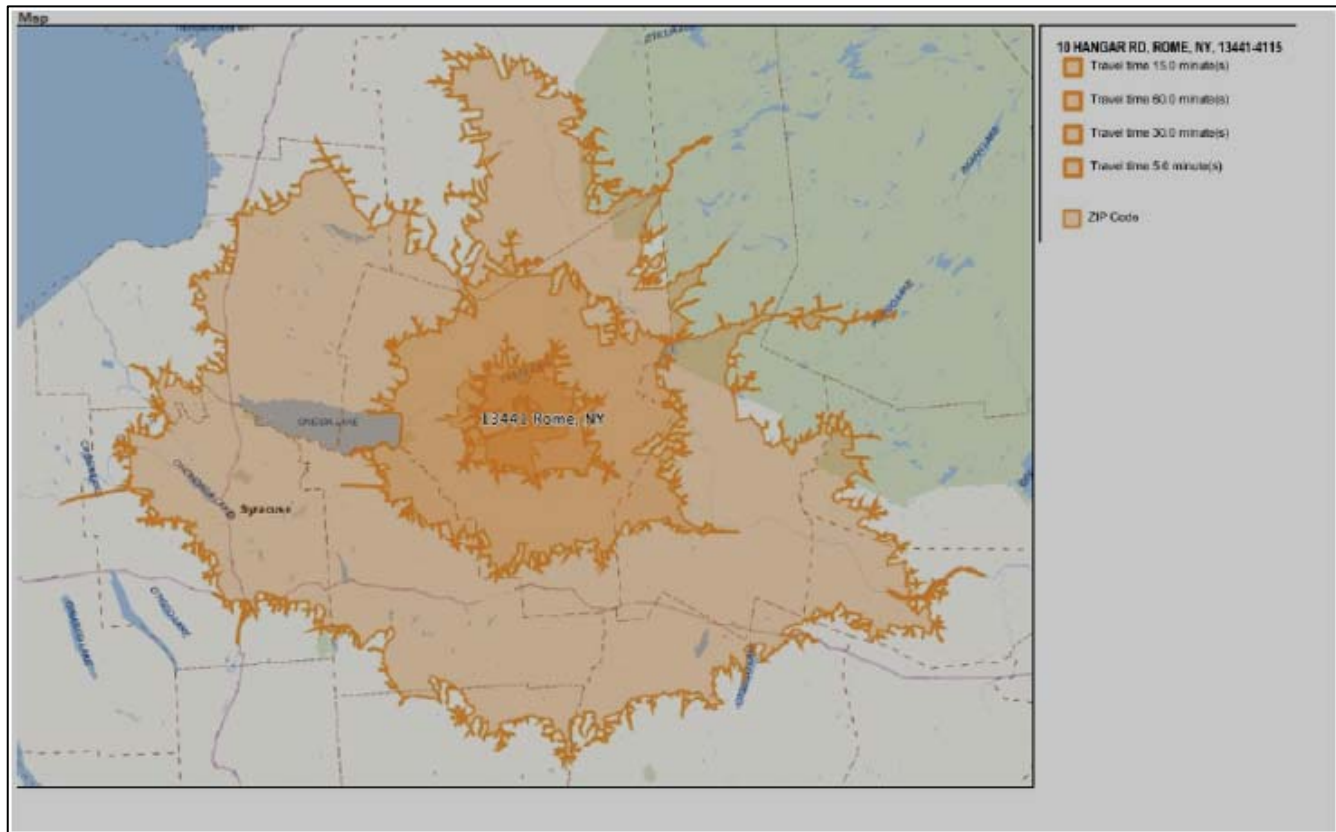


Figure 12: Demographic Analysis Map 60, 30, 15 and 5-Minute Drive Times

Source: Claritas, March 2017

## General Demographic Analysis

An analysis was performed of the population, demographics, education, employment and housing information presented by Claritas *Pop-Facts Demographics Report* dated March 17, 2017, located within three market areas surrounding the Woodhaven Site: 1) the Rome zip code as well as 2) a 15-minute, and 3) 30-minute drive time market area around the Woodhaven Site. Within Rome (zip 13440), the population is just over 42,000 in 2017. The average age is 41 years old and family size is 2.3 persons. However, as one travels out of Rome, the area is relatively rural, with the exception of Utica, so Rome and Utica population is significant in the population of the 15-minute and 30-minute travel time distances. In all cases the population has declined over the past five years with the greatest declines of -1.8 %, -1.9% and -1.6% in Rome, the 15-minute drive time ring, and the 30-minute drive ring, respectively. In all cases,



the population of Rome and its surroundings is expected to continue to decline until 2022, but at a reduced rate of between 0.3% and 0.4%. Conversely, the United States is expected to grow at 3.3% from 2017 to 2022.

There is limited diversity in race, religion, housing and education, but overall the population is largely white (85% to 88%) with the highest concentration being of Italian decent (17%) in all areas. Further from Rome, there is a slight increase in the number of Asians, possibly signifying a possible influx of STEM workers as the goal to create more technical employment with the Marcy Nanocenter has been a focus of the area. However, the median income per household is highest for the population within the 15-minute driving time of Rome at just over \$55,000 but only slightly higher than the United States Median Household Income of \$53,000. The number of empty nesters versus Millennials in each demographic ring is relatively consistent. For example, in the City of Rome, 14% of the population is between the ages of 55 and 64 whereas 13% of the population is between the ages of 25 to 35.

Unemployment is lowest in Rome (3.6%), and is rather consistent at approximately 4.5% in the outer markets, which closely matches the United States rate at 4.6%. About 60% of the jobs are classified as White Collar throughout all demographics. However, what is most striking about the population are the educational levels. While over 12% to 14% of adult Americans have a bachelor's degree, increasing by a point the further the demographic ring is from Rome, it is well below the national average of 18%. Master's degree holders were rather consistently at 8% in the three market areas around Rome, compared to over 12% for the United States as a whole. **Also, the highly needed professional degrees demanded by newest technology jobs may require an influx of more educated people to the area if the job market grows in areas such as advanced manufacturing, tech- centers, tech-logistics, government UAS and flight systems.** As such, GBTP has already made great strides in training students at MVCC the needed technological skills required. However, it does appear that the younger population generally has been leaving the area for jobs that are more plentiful elsewhere, and thus there is a declining local population, which is not in sync with the growing national population.

Most housing is older housing stock, with the average year built at 1955 and is consistent amongst all of the three driving radius distances. Just over 66% of the population live in owner-occupied housing compared to 70% in the United States. Renter households account for approximately 35% of the households, rather consistently among the three demographic market areas. In order to stabilize a neighborhood, ownership of housing tends to make people more committed to a neighborhood and interested in maintaining neighborhoods and

limiting the spread of blight. Based on published demographics, a monthly housing affordability rent ranges from approximately \$1,200 to almost \$1,400 per month per household within all three demographic regions.

ROME DEMOGRAPHICS	ROME zip 13440	15 minute travel time	30 Minute travel time	USA
Household income based on 30% monthly income as affordable rent				
Median HHI	\$ 53,077	\$ 55,353	\$ 49,896	\$ 53,000
monthly affordable rent	\$ 1,327	\$ 1,384	\$ 1,247	\$ 1,325

Figure 13: Rome Demographics and Housing Monthly Affordability

Source: Nielsen/Claritas, *Pop-Facts Demographics*, March 17, 2017

In summary, the key issue is retaining and retooling the existing educated population and as new technology-related jobs are created, to attract a more educated population to the area, which converts to the ability to support new commercial and upscale multifamily real estate development to diversify the offerings.

## Business Demographics for Development

An analysis of business facts presented in the Claritas *Pop-Facts Demographics Report* dated March 17, 2017 indicates that much of the workforce works in office administration (12.8% in Rome versus 14% within the 30-mile driving radii), which is generally low wage employment. Other larger workforce categories are found in the following classifications: Sales (10%), Management (8%), Health Practitioner/Technician (7%) and Education and Library (6.6%), which generally require a more educated worker. Sales drops to 9% when considering the 30-minute driving distance, whereas Education and Library increases to 7% for the same area. The other larger employment categories remain fairly consistent throughout the entire demographic area. Other trends to note is Construction is very low in Rome at 3.3% but climbs to 4.0% in the 30-mile driving distance, all of which is below the United States of 5.3%. Healthcare Support is well below that of the US (7.7%) as it fluctuates from 2.4% in Rome zip code to 3.0% in the 30-minute driving radii. Ironically that trend is counter to the Healthcare Practitioner/Technician

category which is more prevalent in the Rome market (consistent at 7.0%) versus the United States at 5.6%.

In the Rome market, it is noted that on average only 1.3% of the population work as an Engineer/Architect and for Computer and Math. Between 2.7% in Rome and 2.0% in the 30-mile radii. To support technology-related companies, which include disciplines of math, computers, finance, engineering and related, it will most likely be necessary to educate the existing workforce population and/or attract a skilled workforce.

One of the important factors considered by businesses looking to expand or to relocate is the analysis of clusters of similar or supporting businesses in a city or region. The Rome market indicates that there are many employees in a large variety of sectors. However, there are a few dominant sectors. The most dominant is Office Administration and Sales, which is generally support services to businesses. Healthcare, which is strong for Rome, is also an important sector that serves the local population and is also an asset in terms of essential services



ROME DEMOGRAPHICS		ROME zip 13440	15 minute travel time	30 Minute travel time	USA
Population	2017 Population	42,053	57,802	62,769	308,745,000
	Growth 17 to 2021	-0.3%	-0.4%	-0.4%	3.30%
	past 5 year growth	-1.8%	-1.90%	-0.2%	NAV
	Population findings	Population in and around Rome is NOT growing			
Households Race		17,522	22,331	26,710	128,643,000
	white alone	88%	87%	85%	71%
	AA	6%	7%	6%	12%
	Asian	1%	1%	4%	2%
	some other race or multiple races	4%	1%	5%	2%
	Hispanic (included in previous)	6%	6%	6%	13%
	Race Findings	30 miles drive time, may signify more tech STEM workers; most Asians are Chinese and Indian			
	Ancestry (major groups)				NAP
Language	Irish	9%	9%	9%	
	Italian	17%	17%	15%	
	German	15%	9%	9%	
	English	6%	6%	6%	
	Polish	5%	6%	6%	
	US	15%	14%	14%	
	All others	33%	39%	41%	
	Ancestry findings	Ancestry similar throughout			
	Speak English at home	83%	92%	89%	
	Speak Spanish at home	4%	4%	3%	
Language findings		Father from center of Rome, most families use English at home			
Household income		ROME zip 13440	15 minute travel time	30 Minute travel time	USA
Age	median age	41.4	41	41.2	37
	average age	41	41	41	38
	Millennial 25 to 35	13%	12%	12%	14%
	Empty nesters 55 to 74	28%	25%	24%	21%
	Total Millennial and Empty nester	41%	37%	36%	35%
	Capture Units				
	Age findings	Average age is older and more empty nesters than USA as a whole; not enough Millennial for the workforce demand			

ROME DEMOGRAPHICS	ROME zip 13440	15 minute travel time	30 Minute travel time	USA
<b>Household income</b>	based on 30% monthly income as affordable rent			
Median HHI	\$ 53,077	\$ 55,353	\$ 49,896	\$ 53,000
monthly affordable rent	\$ 1,327	\$ 1,384	\$ 1,247	\$ 1,458
<b>HHI findings</b>	supportable rents higher than existign inventory			
<b>Education</b>				
High school dip. Or equivalent	34%	36%	33%	27%
Bachelor degree	12%	13%	14%	18%
Masters, professional or higher	8%	8%	9%	12%
<b>Education findings</b>	Farther away from CBD is more highly educated			
<b>Family and own children</b>				
Married couples own children	24%	25%	26%	
Female head of household owned children and head of household no own children	23%	17%	21%	
Family size	2.3	2.3	2.4	2.5
<b>head of household findings</b>	Family size slightly smaller in CBD			
<b>Number of vehicles per HHI</b>	1.6	1.6	1.6	1.8
<b>Poverty</b>				
families above poverty line	89%	91%	88%	90%
2016 families with children below poverty line	10%	7%	10%	10%
<b>Poverty findings</b>	Poverty levels consistant with US averages			

Figure 14: Demographic Snapshot for zip, 15 and 30-mile drive time around the Site.<sup>31</sup>

Source: Nielsen Claritas, March 2017

<sup>31</sup>The Williams Group Real Estate Advisors using Nielson/Clarita's demographics data 2017 *Demographic Snapshot*, (Rome, March 2017)

ROME DEMOGRAPHICS	ROME zip 13440	15 minute trave time	30 Minute travel time	USA
Employment ( by occupation)				
architect/engineer	1.3%	1.3%	1.2%	1.8%
arts and sports	1.8%	1.8%	1.6%	1.9%
building ground maintenance	3.5%	3.3%	4.0%	4.0%
business	5.0%	5.0%	4.5%	4.7%
community and social services	2.4%	2.4%	2.6%	1.7%
computer and math	2.7%	2.7%	2.0%	2.5%
construction	2.4%	3.3%	4.0%	5.3%
education and library	6.6%	6.8%	7.0%	6.1%
farming and related	0.6%	0.7%	0.5%	0.7%
food prep.	5.5%	5.3%	6.0%	5.6%
heath practitioner/tech	7.0%	7.0%	7.0%	5.6%
healthcare support	2.4%	2.6%	3.0%	7.7%
maintenance and repair	4.2%	4.4%	3.4%	3.3%
legal	1.2%	1.0%	0.9%	1.2%
life physical social science	0.5%	0.5%	0.6%	0.9%
management	8.0%	8.2%	8.0%	9.7%
office admin	12.8%	12.8%	14.0%	14.0%
production	5.7%	5.6%	7.0%	6.0%
Police	4.4%	4.5%	3.6%	4.0%
sales	10.1%	10.2%	9.0%	11.0%
personal services	4.8%	4.4%	4.5%	3.5%
transportation	5.6%	5.8%	5.7%	6.0%
unemployment rate	5.7%	5.7%	5.7%	4.6%
<b>Employment findings</b> <p>Unemployment is higher than US average. Higher number of lower end maintenance and repair jobs</p>				
occupation classification				
blue collar	19%	19%	19%	NAP
white collar	60%	60%	59%	
Transportation to work				NAP
drove alone	83%	84%	82%	
public transportation	1%	1%	0%	
other (includes walk, bike and car	0%	0.1%	0%	
Transportation findings (average travel time 25 min)	Very low usage of public transportation.			

Figure 15: Business Demographics in the Rome Zip, 15 and 30 minutes' drive time<sup>32</sup>

<sup>32</sup>Ibid



## **Retail Demographics**

Another way to analyze demographics is to analyze the data used to estimate the amount of retail and services that are supportable by a particular demographic around a site that is being tested for development. TWG analyzed the demographics around the Woodhaven Site to include the Rome zip code, a 15-minute driving time and a 30-minute drive time. The Rome zip code would represent the 13440 zip (population of 42,000 people) generally within the downtown area. These would include retail customers that could easily get to any retail downtown or at the Woodhaven Site and would be target Customers. It would estimate a local customer and the 15 minute and 30 minute miles are the larger submarket in an area where driving is the norm.

In terms of retail demographics, the amount of retail spending dollars available per family is based on the basic demographic income data. The analyses can be utilized to estimate the amount of retail supportable by a given demographic based on their viable spending income.

From the following chart, the demographics of the households were arrayed. Over 6% of the population near the Woodhaven Site was of Hispanic origin. Most of the population was of Italian ancestry (different than ethnic origin) and made below national average incomes. Between 33% and 41% of people are of other or mixed ancestry. Most people spoke English at home, but more used English the farther away from the site. Approximately 4% of people were probably new to the area and of Hispanic origin and spoke Spanish at home.

Most people had a high school education. However, generally those with Bachelor degrees and higher were below national averages. This is a concern as most posted jobs as GBTP and at the Marcy Nanocenter require at least a bachelor degrees and preferable in STEM.

Qualitative issues such as ethnic background, educational levels and income assist with determining the retail program that would be best suited for the potential customers. TWG calculated the effective buying income (income after taxes) then calculated the estimated income available for retail spending, which is approximately 50% of effective buying income. Based on these calculations, TWG estimated the total available income for retail spending within the various drive times. Then an average sale per square foot is utilized to determine the total retail supportable. Based on some conservative capture, the walking population (based on the assumption of 150 new units or households on the Woodhaven Site) could support only 1,800 sf of retail, as the number of households is limited. If a 4% capture from the 15-minute drive were obtained, then over 37,000 square feet of targeted retail could be supported. This retail would have to be destination and programmed to be attractive and

designed to meet the incomes of the target audience. The retail could include food, restaurants, services, markets and other programs to be discussed more fully in the real estate market analysis.

Based on the various drive time and the Rome-Utica MSA, analysis and estimate of capture was performed. A range of retail supportable was fairly consistent with the range from 27,000 sf supportable to 37,200 sf. The goal of the analysis is to determine based on some conservative capture, the amount of retail that may be supportable and appropriate as part of a larger mixed use development. However, the income capture will also be coupled with a supply/demand Gap analysis as well as a retail real estate analysis.

RETAIL DEMOGRAPHICS							NEW UNITS MF per	
source; Nielsen Clarita's Dec 2016	ROME zip 13440	15 minute travel time	30 Minute travel time	UNITED STATES	Rome Utica MSA		TWG MARKET	ANALYSIS
Pop facts								
Population	42,053	57,802	62,769	330,000,000	316,000			
Prime retail population 35 to 54	10,513	14,451	15,692	82,500,000	74,450			
Households	17522	22331	26710		131,667			150
growth 2016 to 2021	-0.3%	-0.4%	-0.4%		-0.20%			0
average HH size	2.4	2.6	2.4		2.3			2.4
median HHI	\$ 53,077	\$ 55,353	\$ 49,896	\$ 51,900.00	\$ 35,000			\$ 60,000
Effective Buying Income rate(EBI)	0.80	0.80	0.81	0.81	0.81			0.81
EBI per household	\$ 42,462	\$ 44,282	\$ 40,466	\$ 42,039	\$ 28,350			\$ 48,600
Total Effective Buying Income	\$ 744,015,694	\$ 988,870,274	\$ 1,080,846,281	\$ -	\$ 3,732,750,000			\$ 7,290,000
Retail buying rate	50%	51%	51%	0.51	0.51			0.51
Total Retail Buying Income	\$ 372,007,847	\$ 504,323,840	\$ 551,231,604	\$ -	\$ 1,903,702,500			\$ 3,717,900
retail buying income per HH	\$ 21,231	\$ 22,584	\$ 20,637	NAP	\$ 14,459			\$ 24,786
Estimated sales per square foot (PSF)	\$ 300	\$ 300	\$ 300	300	300			300
Retail Supportable SF	1,240,026	1,681,079	1,837,439	-	6,345,675			12,393
<b>Capture rate</b>	3%	2%	1.5%	NAP	0.5%			15%
source; Nielsen Clarita's Dec 2016							NEW UNITS MF per	
Pop facts	ROME zip 13440	15 minute travel time	30 Minute travel time	UNITED STATES	Rome Utica MSA		TWG MARKET	ANALYSIS
<b>Actual retail SF supportable based on estimated capture</b>	<b>37,201</b>	<b>33,622</b>	<b>27,562</b>	<b>NAP</b>	<b>31,728</b>			<b>1,859</b>

Figure 16: Rome Retail Demographics Analysis, source Data, Nielsen Clarita's 2017

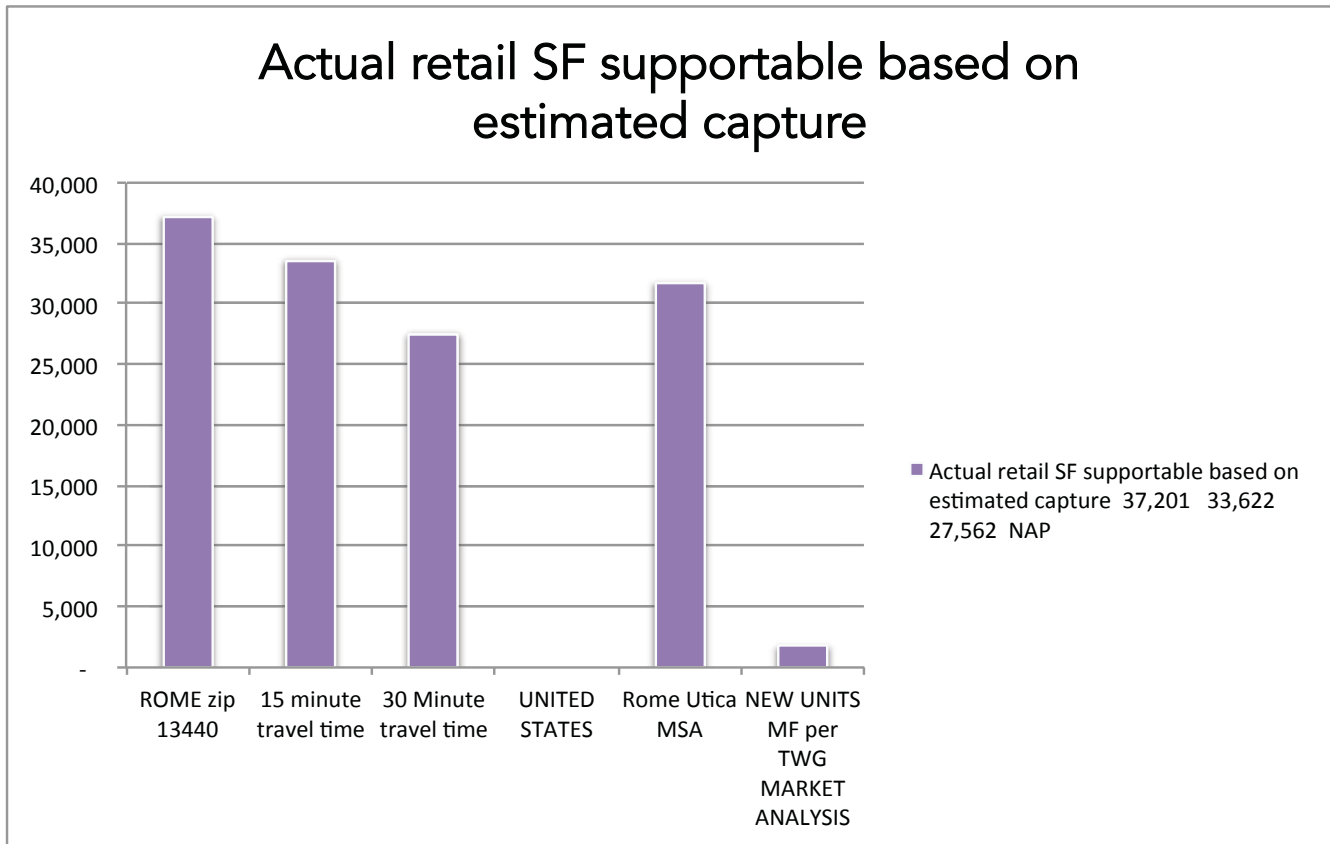


Figure 17: Retail demographics and Square Footage Supportable <sup>33</sup>

<sup>33</sup>Ibid



## 6. Real Estate Market Analysis for Development

### A. Multi-Family Real Estate

The City of Rome offers numerous multifamily apartment properties and almost all of the properties were built prior to 1980 with the most basic amenities and finishes. Even so, these apartments operate at almost full occupancy.

Multifamily Supply and Proposed Projects													
Larger Rome Apartment Comp	Address	Distance from Site	Year Built	# Units	Stories	Efficiency	Unit Type (Quantity/SF)				Base Unit Rent (\$)		
							1 Bed	2 Bed	3 Bed	Studio	1 Bed	2 Bed	3 Bed
Miller Town Homes	1901-1909 N. George St.	2.3 miles NW	Older	48	2		12/576sf	36/1,062sf			\$800-\$1,200		0%
Springbrook Apartments	23 WoodCreek Dr.	3 miles NW	1988	194	3		728sf	904sf	1,036sf		\$675	\$775	\$875
Foxwood Townhouses	8236 Beilby Rd.	Independent economy	1971	32	2			#/## sf			\$1,000-\$1,200		0%
Georgian Arms	119 N. George St.	3.6 miles SW	1985	81	17		81/625sf						0% Fitness Center
Madison Plaza	100 N. Madison St.	3.7 miles SW	1974	127	7	29/433sf	48/522sf	50/796sf					0% Low income apts.
Park Drive Manor II	430 Park Drive Manor	Lower chain	Older	102	2						\$493	\$591	\$683
The Delta Apartments	7813 Merrick Rd.	2.5 miles NW	2015-2016	32	2			32/1,163 sf				\$1,450	n/a
Windsor Mews	417 N. Levitt St.	4.5 miles W	1970	200	3		#/595-630sf	#/735-765sf					0% Playgroud, patio or balcony;
Rose Garden	113 Rose Ln.	0.5 miles NW	1961	106	2		#/500 sf	#/565-590sf			\$595	\$620	2% Rent Assisted Apts. Section 8
Valentine Apartments	152 Turin St.	1 mile W	1977	99	7		99/625sf						3% Plus \$50/mo for garage
Countryside Apartments	7108 Rome Oriskany Rd.	5 miles S	1953	24	2	16	5	3					0% Targeted to senior citizens and
959 Floyd Avenue Apartments I and II	959 Floyd Ave.	0.1 miles NW	1968	46	2								0% people with medical issues
Colonial Apartments	203-205 St. Peters Ave.	1.5 miles SW	1965	183	7	11/500sf	168/650sf	4/760sf					0%
Canal Village	407 West St.	3 miles SW	Older	33	2								0% Low income apts.
				<b>Total Units</b>	<b>1,307</b>								

Source: Apartments.com, ApartmentFinder.com, Credio.com, hotpads.com

Figure 18: Existing Multifamily Supply in Rome (# denotes actual number not available)

Source: Apartments.com, Apartmentfinder.com, Credio.com, hotpads.com, Buck Construction

Examples of typical apartment complexes in Rome follow, both of which are managed by CRM Rentals.<sup>34</sup>

- Park Drive Manor II is a 102-unit garden style development; amenities include a playground and either a patio or balcony. This property is located at 430 Park Drive Manor in Rome, which is situated between the Woodhaven Site and Griffiss siness and Technology Park ("GBTP"), less than 0.5 miles east of the Site and near MVCC. Monthly rents range from \$493 for 1-bedroom to \$591 for 2-bedrooms and \$683 for 3-bedrooms. This complex offers Section 8 rents, appears to be older but did upgrade with new carpeting.
- Springbrook Apartments is located at 23 Wood Creek Drive in Rome, 3 miles northwest

<sup>34</sup> Apartments.com, Apartmentfinder.com, CRM Management website (<http://www.crmrentalmgmt.com/>)

of the Site and is a 194-unit development with low-rise townhouse style. Rents range from \$675/month for a 1-bedroom (728 sf), \$775/month for a 2-bedroom (904 sf) and \$875 month for a 3-bedroom (1,036 sf) apartment. The property has amenities including air conditioning, fitness center community room and a pool. The complex was renovated in 2012 with newly installed carpeting and new kitchens and bathrooms, although with builder grade materials and white appliances, and appears to be in good condition. Short term furnished rentals for as little as 3 months are available and are advertised for corporate travelers.

Recognizing that a void existed in the Rome market for higher end apartments, Buck Construction developed The Delta Apartments, a new, ground up, luxury apartment complex at 7801 Merrick Road in Rome, adjacent to the Springbrook Apartments and approximately 2.5 miles northwest of the Woodhaven Site. Talking with the developer, he explained how he decided to build luxury apartments in Rome because there was no high-end product available, as he confirmed is still the case. The developer built in a phased approach to sample the market's acceptance of the luxury product. The first two 8-unit buildings were completed in 2015. The developer is now just finishing two more 8-unit buildings and they will be ready for occupancy June 1, 2017 (one unit is already preleased as of mid-March). At that time, the Delta complex will have 48 total units, all 2-bed, 2-bath, comprised of 1,098 square feet and rent for \$1,450/month. Amenities include a detached dedicated garage with storage space, granite countertops and stainless steel appliances in the kitchens, hardwood floors, high end finishes, sound proof walls and in-unit laundry facilities. There is no clubhouse, fitness room or pool amenities. When asked about the possible construction of these common area amenities, the developer mentioned it would not be cost effective until he had built and leased 64 units.<sup>35</sup>

Although the units have been quickly absorbed by GBTP professionals, doctors and professionals working in Utica area, and downsizing seniors (divorced, empty nesters or tenants who live in Florida for part of the year), the developer feels that he is nearing the end of absorption for these types of units and may have been too ambitious to have constructed 48 units. He had originally intended to build 64 apartment units, but he is going to be turning his attention to building smaller patio homes instead ranging at the \$170,000 to \$200,000 price point. He expects to absorb between 5 to 10 patio houses in a year.<sup>36</sup>

One complaint noted by a local developer is the higher tax rate of development in Rome

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<sup>35</sup> Steven Buck, Buck Construction

<sup>36</sup> Ibid

versus neighboring towns<sup>37</sup>. This may be a reason that more multifamily properties are being proposed and developed in neighboring communities to Rome, where the commute to GBTP is still convenient. Even so there are some new multifamily projects conceptualized, proposed or under construction in Rome.

Proposed Multifamily Construction in Rome											
Larger Rome Apartment Comp	Address	Distance from Site	Year Built	# Units	Stories	1 Bed	2 Bed	Studio	1 Bed	2 Bed	Vacancy % Amenities
The Delta Apartments	7813 Merrick Rd.	2.5 miles NW	6/1/17	16	2	16/1,163 sf				\$1,450	1 unit preleased Enclosed garage, granite counters, stainless steel appliances
Rome Turney Redevelopment Scenario 1*	Downtown Rome BOA Study Area	4.5 miles SW	Concept	115-120	4	800	1,000		\$1,120	\$1,400	5,500 sf ground floor retail, commercial such as a café, coffee shop, retail shop; apt. high end finishes such as stainless steel appliances, granite countertops; potential live/work or loft units
Rome Turney Redevelopment Scenario 2*	Downtown Rome BOA Study Area	4.5 miles SW	Concept	80-90	4	800	1,000		\$1,120	\$1,400	4,500 sf ground floor retail, commercial such as a café, coffee shop, retail shop; apt. high end finishes such as stainless steel appliances, granite countertops; potential live/work or loft units
George Street Parking Garage	George Street	3-4 miles SW	Possible Apt Reuse	n/a		NAV	NAV				
Dewitt Clinton School	423 Ann St.	3.9 miles SW	Under Consideration	60		NAV	NAV		est. \$700	est. \$850	Being considered by non-profit developer, DePaul Community Services which has a purchase offer; New Construction; 30 units with support services for elderly, medically frail or mental illness
Old City Hall	207 N. James St.	3.3 miles SW	Fall 2017	8					\$ 1,000	\$ 2,000	Under Construction, YES Development, high end finishes; loft apts; commercial first floor

Source: Camoin Associates, Strategic Site Financial Feasibility, Nov 2016\*; Observer-Dispatch " Projects" 2/16/17; Camoin Associates," Real Estate Market Analysis: Erie Boulevard Brownfield Opportunity Area & the City of Rome, NY", Nov 2016

Figure 19: Proposed Multifamily Construction in Rome

Source: Camoin Associates, Strategic Site Financial Feasibility, Nov 2016\*; Observer-Dispatch " Projects" 2/16/17; Camoin Associates," Real Estate Market Analysis: Erie Boulevard Brownfield Opportunity Area & the City of Rome, NY", Nov 2016; Rome Sentinel, *City Exploring Former School for Housing Units*, February 17, 2017; Steve Buck, Buck Construction; Observer-Dispatch, *Rome's Old City Hall Gets Another Reprieve*, March 24, 2017

Camoin Associates recently completed a Strategic Site Financial Feasibility study dated November 2016 in which they considered the adaptive reuse of the Turney building (Downtown Rome BOA) in Rome. In the study, they identified two potential feasible redevelopment uses of the Turney building, in which both scenarios included a portion of market rent apartments. Although the Downtown Rome BOA is still in the remediation phase and is estimated to take longer to be shovel ready as compared to the Woodhaven Site, it is a mixed-use project that is expected to attract and capture the same target demographic market of higher-income Millennials as the Woodhaven Site. The City of Rome should exercise care

<sup>37</sup> Justin Gualtieri, Rome Building Contractors Incorporated

not to duplicate the same demographics when considering proposed development projects at either the Rome Turney Building, the Woodhaven Site or other Rome locations.

Little information can be found describing the George Street Parking Garage reuse project but it is noted that multifamily units are one use under consideration.<sup>38</sup> In another proposed project, sixty apartment units are expected to be constructed at the Dewitt Clinton School to be occupied specifically by a mixed demographic including tenants that require special services,<sup>39</sup> reflecting a different demographic target than proposed at the Woodhaven Site.

## Proposed Multifamily Construction in the Utica/Marcy Area

Although limited additional new luxury multifamily construction is proposed in Rome, it is noteworthy to understand the proposed projects being considered and even currently under construction in the Marcy-Utica area as many of these facilities would also target the Millennials and employees of GBTP, and is within commuting distance to Rome.

Larger Rome Apartment Comp	Address	Distance from Site	Year Built	# Units	Stories	1 Bed Size	1 Bed qty/SF	2 bed qty/SF	3 Bed QTY/SF	1 Bed Rent	2 BedRent	Notes	Amenities
Canal View Apartments	9009-9016 Horatio Ave., Marcy	10 miles SE	2017	39	1		39/1,400sf			\$	1,500	In lease up phase	Garage, Washer Dryer hookup, no granite countertops but stainless steel appliances, attached garage Clubhouse, BBQ/Grill Area, Pet
Deerfield Place	1 Patriot Circle, Utica	15.2 miles SE	2017	156	2	#/1,108-1,168	#/1,393-1,765sf	#/1,843sf		\$1,140-\$1,290	\$1,740-\$1,940	In lease up phase	Play Area, Pool, Fitness Center
Roosevelt Residences	11 sites; Corn Hill neighborhood	16.0 miles SE	Under bid 2016	50									Affordable housing project
Lofts at Globe Mill	811-827 Court St., Utica	15.0 miles SE	Spring/Summer 2018	131	4	50/375sf-600sf	81/1,000sf-1,300sf						Historic Building Redevelopment, Mixed Use, Mixed Income Loft Apts., 36,000 sf commercial; under contract to close April 2017
118 Liberty Street	118 Liberty St., Utica	15.0 miles SE		58									Retail; office and commercial space; apts on upper floors
Doyle Hardware	330 Main St, Utica	15.0 miles SE		48	4	#/450-600-700sf	#/800-1,100 sf			\$800-\$1,350	\$1,450-1,550		Purchase; in planning stages
Lewis Custom Townhouses	6200 Mallory Road, Marcy	18.0 miles SE		162	2								Townhouse Style Apartments
				<b>Total Units</b>	<b>644</b>								

Source: KCG Construction, Hueber-Breuer Construction; Observer-Dispatch "New Housing Development Slow Going in Suburbs" 6/1/16; Observer-Dispatch "Projects" 2/16/17

Figure 20: Proposed Multifamily Construction in Utica-Marcy Market Area

Source: KCG Construction; Hueber-Breuer Construction; Observer-Dispatch, *New Housing Development Slow Going in Suburbs*, June 1, 2016; Observer-Dispatch, *Projects*, February 16, 2017; Apartments.com; Rome Sentinel, *Regional council seeking \$25M for projects for 6-County Area*, Oct 15, 2016; Utica Municipal Housing Authority, *Utica MHA Seeks Bids for Roosevelt Residences Project*, July 18, 2016, Observer-Dispatch, *West Utica's Globe Mills Site Could Become Housing*, June 9, 2016, Lofts at Global Mills website (<http://www.kcgdevelopment.com/portfolio/lofts-at-globe-mill/>); Deerfield Place website (<http://www.deerfieldplaceutica.com/0>)

A total of 644 multifamily units are proposed or under construction in the Utica-Marcy area. In 2017, nearly 400 units have been added to the Utica-Marcy upscale multifamily supply. The Canal View Apartments in Marcy offer 39 2-bedroom units with attached garage commanding

<sup>38</sup> Observer Dispatch, *Projects*, February 16, 2017

<sup>39</sup> Rome Sentinel, *City Exploring Former School for Housing Units*, February 17, 2017



\$1,500/month in rent. Similarly, the 156-unit Deerfield Place in North Utica offer both townhouse and apartment living with amenities such as a clubhouse, pool, and fitness center, also commanding a \$1,290/month for a one-bedroom apartment.

Most of the proposed multifamily is slated for downtown Utica and are redevelopments of existing historical manufacturing buildings. The purchase of the Lofts at Global Mill is expected to close by mid-April 2017 with the immediate construction of 131 high-end multifamily units to be available by Summer 2018.<sup>40</sup> Hueber-Breuer Construction is about to begin the renovation of the Doyle Hardware building to include 48 multifamily units with high end finishes and estimated rents to be as high as \$1,350/month for one bedroom and \$1,550/month for two bedroom units.<sup>41</sup>

Discussions around another 270 multifamily units are being publicized, yet these proposed projects are still in the planning and feasibility phases. Of these units, the proposed 50-unit Roosevelt Residences will be targeted affordable housing, thereby attracting a different demographic than the Woodhaven Site.<sup>42</sup>

## **Multifamily Housing Analyses**

Existing multifamily rentals in the Rome market demonstrates a strong rental market while indicating that there is a lack of housing targeted to the young tech professionals or Millennials looking for apartments with high end finishes, preferably with an exciting community feel. Phrases like “geeky cool” are used to attract renters to new loft-like units at much higher rental rates in other up and coming areas and could be the just as effective at the Woodhaven Site.

An upscale multifamily offering of mixed apartment sizes of studio, one-bedroom and two-bedroom apartments as well as townhouses with exceptional amenities and unique product offerings, would be most appealing to high-tech employees at GBTP, Millennials and higher-paid younger professionals (including doctors, lawyers, etc.), younger couples, divorcees, snow birds and empty nesters. The only high-end product that exists in Rome is the 32-unit Delta Apartments, which were fully occupied as of March 2017 (this is prior to the 16 additional units coming on line in June 2017), however, the complex only offers two-bedroom apartments and no community amenities. Providing a mix of apartment sizes will allow the multifamily apartments at the Woodhaven Site to be attractive to a greater mix of clientele with different

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<sup>40</sup> Source: Lofts at Global Mills website (<http://www.kcgdevelopment.com/portfolio/lofts-at-globe-mill/>)

<sup>41</sup> Source: Andy Breuer, Hueber-Breuer Construction

<sup>42</sup> Source: Utica Municipal Housing Authority, *Utica MHA Seeks Bids for Roosevelt Residences Project*, July 18, 2016

needs and price points.

To approximate the potential demand for the Woodhaven Site, an analysis of the existing demographics and related economic indicators was completed for Rome and neighboring communities within a 30-minute drive time. Specific age groups were considered to reflect the potential targeted renters. The younger age group of 25 to 34 years of age is expected to include Millennials, younger professionals and young couples, most likely without children. Divorcees or single older adults who may not have an interest to live in a single-family home, may choose to live at the complex and would be represented in the 35 to 54 years of age group. Empty nesters who are ready to step away from the burden of home ownership and snow birds, people who reside in warmer climates for the winter months and feel more comfortable leaving an apartment behind, would be represented by the 55 to 64 years of age group.

Figure 20A: Potential Capture of Multifamily Demand at Woodhaven Site						
	Market: ROME Zip 13440	Market: 15 Minute Travel Time	Difference: 15 Min less Rome Zip	Market: 30 Minute Travel Time	Difference: 30 Min less 15 Min	
Population:	42,035	57,802	15,767	249,765	191,963	
Millennial 25 to 35	13%	13.8%	2,439	12.9%	24,266	
Age 35 to 55	25%	26.3%	4,649	24.5%	46,017	
Empty nesters 55 to 64	14%	13.6%	2,046	13.9%	26,804	
Capture % by Age: Millennial 25 to 35	1.00%		0.50%		0.25%	
Age 35 to 55	0.25%		0.10%		0.00%	
Empty nesters 55 to 64	0.50%		0.25%		0.00%	
Capture Units by Age: Millennial 25 to 35	55		12		61	
Age 35 to 55	26		5		-	
Empty nesters 55 to 64	29		5		-	
Capture Units	111		22		61	
Total Estimated Capture Units	193					

Figure 20A: Potential Capture of MF Demand at Woodhaven

A very conservative capture rate was assumed for each of the age categories after reviewing pertinent demographic data, some of which is highlighted in Figures 14 and 15. A greater percentage of the younger age group, especially those currently residing closer to Rome, were expected to relocate to the Woodhaven Site if an exciting new development was constructed with amenities that would be attractive to the targeted audience. However, given the limited number of upscale multifamily offerings in the area, it is anticipated that some people would relocate as far away as a 30-minute drive to Rome for an exciting new offering. Although not analyzed, the younger crowd willing to commute from as far away as Syracuse, the most attractive and entertaining location for the youngest employees, would only add to the potential demand. Additionally, as 500 new jobs are generated from the imminent opening of Quad-C over the next five years, and with the hopeful eventual tenancy of the Marcy Nanocenter, the Woodhaven Site could be even more demand as a housing option. As such, a

phased approach is recommended, beginning with 50 units.

The affordability of rent was also considered for the market area. Based on demographics and income level for the residents of the City of Rome and neighboring communities within a 30-mile driving distance from the Woodhaven Site, approximately \$1,250 to \$1,850 per month is affordable for the average family of approximately 2.3 persons earning between \$50,000 and \$55,000 per year. This calculation is based on the assumption that 30 percent of Household Income is an affordable price for rent. As such, as displayed in *Figure 38: Woodhaven Draft Program Matrix*, the proposed rents for new hip apartments at the Woodhaven Site of \$1,300/month for 1 to 2 bedroom apartments and \$1,400 to \$1500/month for 2 to 3 bedroom apartments or townhouses will have not out-priced the affordability of the local community.

In summary, the overall apartment market in Rome is strong. Vacancies are very low for the older stock as well as upscale units, which were quickly absorbed and demonstrated that they are sought-after. The key to making new development feasible is to target the young and hip, marketing the units with unique and important amenities that are appealing to this demographic. These types of units are typically large open and have an interesting loft or historic feel or are new and slick. As compared to the proposed apartments in both downtown Rome and the Utica-Marcy market, multifamily at the Woodhaven Site should differentiate itself by playing up its natural amenities of the Mohawk River and the Mohawk River Trail. Pools, outdoor spaces and recreational amenities are a necessity as well as large well stocked fitness areas and in unit laundries are essential. Wi-Fi and Security are also a must. An overview of the proposed housing programming for the Woodhaven Site is as shown in *Figure 38: Woodhaven Draft Program Matrix*.

### **Potential Housing Demand from Griffiss Business Technology Park**

A different perspective was also taken to estimate the potential for new multifamily housing at the Woodhaven Site. An analysis was performed to understand the commute distance and travel costs of GBTP's employees. From 2012 through 2014, the Griffiss Local Development Corp ("GLDC") surveyed GBTP employees to determine where they live. The results of the survey, presented in the GLDC Griffiss Annual Report for each respective year, indicate that over the surveyed period, employees have been moving away from Rome and its northern and western suburbs, towards the more accessible locations of Utica, Southern Oneida County as well as in the direction of Syracuse, which is often cited as a desirable location for the younger generation as it is closer to Syracuse University and related entertainment offerings targeted to the younger population. Internet blogs used by younger professionals have indicated that they prefer to live in a more vibrant and lively urban community and are willing to commute an hour

away rather than reside in sleepier communities such as Rome.

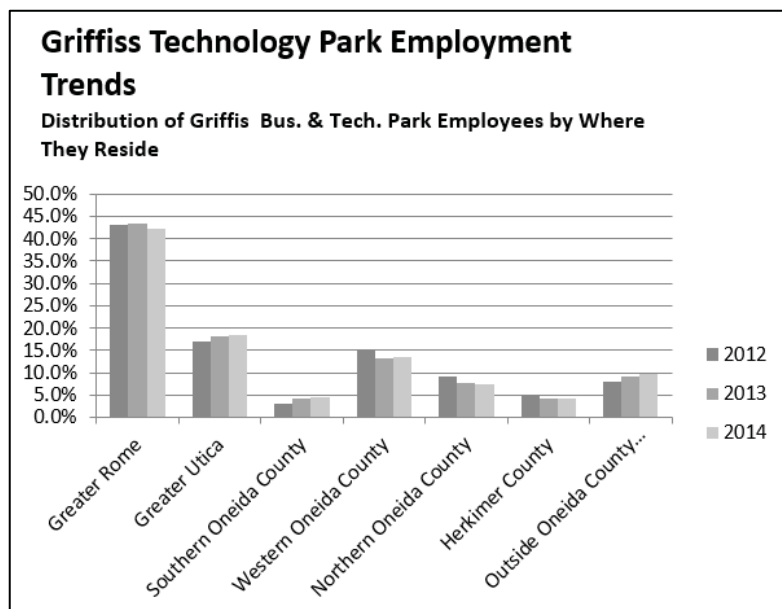


Figure 21: Griffis Employment Trends

Source: Griffiss Land Development Corp, Griffiss Annual Reports 2012-2014

Although an upscale multifamily complex would command a significantly higher rental rate than existing, older multifamily properties in Rome, the cost in time and expense to commute may also offset that added rental expense for a GBTP employee willing to relocate to the Woodhaven Site. For example, assuming a five-day commute for an employee residing in Utica, then the cost of commuting to work would amount to an estimated \$342/month. Therefore, the employee would have over \$300 in monthly commutation savings which could be applied to a higher rent (besides the additional commute savings in time) if they were willing to relocate to the Woodhaven Site. One to 3 percent was assumed as a conservative estimate of the capture rate of GBTP employees who might relocate to the Woodhaven Site if a unique, upscale, destination, community type of complex was constructed. Currently the only upscale property located in Rome is the Delta Apartments however, this property only offers two-bedroom apartments with garage for \$1,450/month and is reported not to be occupied by any tenant younger than 30 years old per its developer<sup>43</sup>. If the Woodhaven Site offered smaller units, including one-bedroom units in addition to two-bedroom units, then the Woodhaven Site might be a desirable residence alternative for the younger generation.

<sup>43</sup> Steve Buck, Buck Construction



<b>Estimated Capture of Griffiss Business and Technology Park Employees to Rome</b>							
<i>Region</i>	<b>GTP Employee Residence using 2014 GLDC Zip Code Survey</b>	<b>Estimated Commuting Distance (miles)</b>	<b>Estimated Travel Cost*</b>	<b># of Griffiss Tech Park Employees (5,784)</b>	<b>Assumed Capture %</b>	<b>Assumed Move to Site</b>	<b>of Employees</b>
Greater Rome	42.4%	N/A	N/A	2452	3%	74	
Greater Utica	18.4%	15	\$ 342	1064	2%	21	
Southern Oneida County	4.5%	17	\$ 387	260	1%	3	
Western Oneida County	13.4%	21	\$ 478	775	1%	8	
Northern Oneida County	7.4%	15	\$ 342	428	1%	4	
Herkimer County	4.2%	40	\$ 912	243	1%	2	
<b>Outside Oneida County (non Herkimer)</b>	<b>9.7%</b>	<b>50</b>	<b>\$ 1,140</b>	<b>561</b>	<b>3%</b>	<b>17</b>	
<b>Total</b>				<b>5784</b>			<b>129</b>

\* Assumes travel 5 days/week; \$0.57/mile used by Prime Companies in their computations; within range provided by 2016 AAA report

Figure 22: Estimated Capture of GBTP Employees

Source: Griffiss Land Development Corp, Griffiss Annual Report 2014

## Mohawk Valley Community College Potential Demand

Adjacent to the Woodhaven Site is Mohawk Valley Community College ("MVCC"). In February 2017, MVCC completed a \$30 million expansion effort that started in June 2015 and included the expansion of the Plumly Complex by 48,000 sf, updating classroom and related technology, opening Library Commons, adding a dining room and a 120-person community room and improving parking.<sup>44</sup> Interviews with MVCC indicated that of the 4,700 MVCC students, only 560 students were dedicated to the Rome campus in 2016-2017 (as opposed to Utica, which is the main campus), which is down from 640 students last year. It is speculated that the number of students at the Rome campus may increase in the coming years due to the expansion. MVCC indicated that only 3 to 4 students studying at the Rome campus choose to live in dorms annually at the Utica MVCC campus(which has be operating below capacity for years) as the MVCC Rome Campus does not provide dorms. Additionally MVCC Rome Campus is not interested in building dorms for two reasons. They do not believe there is the demand for dorms, as the majority of students commute to Rome. Additionally, the expense by MVCC to provide 24/7 public safety, meals, health and wellness services and other activities would not make sense. Although fifty students enrolled in the one-year certificate Airplane program are from out of the area, they require a year-round housing option, that the dorm would not provide.<sup>45</sup> It is assumed that if a MVCC student wanted to live off campus, the rental rates of multifamily housing of many existing facilities in the Rome area are affordable, but those

<sup>44</sup> Source: Mohawk Valley Community College website ([www.mvcc.edu/](http://www.mvcc.edu/))

<sup>45</sup> Source: Franca Armstrong, Dean of Rome Campus, Mohawk Valley Community College

proposed at the Woodhaven Site would exceed a student's budget for living expenses.

## Single Family Housing

Single family is by far the housing product that is in the highest existing inventory. It makes up over 61% of the available product.

Single Family Affordability Analysis	
Median Income	\$53,000
% allowable for Housing costs monthly (30%)	\$1,325
Suggest House sales Price	\$250,000
Loan to Value	75%
down payment	\$62,500
Borrowed amount	\$187,500
mortgage	-\$1,096
Mortgage meets affordability	YES
House Size--2 bedroom to small 3 bed in SF	1500
\$/sf (low moderate)	175
Total Cost	\$262,500
Developer profit	-\$12,500

Figure 22A: Single Family Housing Feasibility Analysis

Above is an example of an affordable single family house for Rome and its feasibility. Overall, the feasibility is not profitable for a builder. At the affordable income for the market, a house at sales price \$250,000 is affordable with a 25-year mortgage at 5%. The monthly mortgage for the typical households is affordable at 30% of monthly income. However, from the builder's perspective, even a modest 1,500 Sf house costs more to build. Even if the developer could build for less than \$175/sf, it is very difficult to make this a target product unless there are some financial incentives that lower the costs. In addition, there is significant existing product in the market that is available for less than \$250,000.

Lastly, there is the issue of economic impact. With say 5 to 6 houses per acre, which would

yield 12 to 15 persons per acre, the estimated retail supportable would be 345 sf of retail per acre of development. However, a denser structure, say of townhouses at (retail in the US is approximately 23 sf per capita) would support 3 times the retail. While there is planning potential, due to the large size of the Woodhaven site, to include single family housing abutting the existing single family neighborhoods, it is difficult to make the case for market support or economic impact unless there are some significant developer incentives to support the viability.

## Senior Housing

Senior housing is a broad category that includes independent housing, assisted housing, Alzheimer housing and continual care. The differential of these types of facilities is the level of support and medical care provided to the resident. The senior population includes two categories: a) the younger seniors at 65 years and older which are also part of the empty nester category and b) the 75 year plus category who are generally the group that are considering some type of assisted housing or semi-independent housing. The 65 plus age group makes up 18% of the population. The 75 year and older age group makes up 5% of the population. Using the median income at approximately \$53,000, at best, a typical senior household could afford \$1,200 to \$1,300 per month as housing costs. It is more than likely that as people age and income declines that target monthly affordability is closer to \$1,000 per month or less.

A look at some local senior housing inventory in both the independent and semi-independent (limited assistance for meals etc.) are multi family style with varying concierge service and plenty of amenities. All of the products overviewed had a price point over \$3,500 per month.

### Senior Housing Near Rome, NY

Name	Location	# Units:				Monthly Rent:				# Vacant Units:				of Total Cottages Units	Comments
		Total	Studio	1-Bed	2-Bed	Cottages	Studio	1-Bed	2-Bed	Cottages	Studio	1-Bed	2-Bed		
Preswick Glen (Independent Living)	New Hartford, NY	124	n/a			40	n/a	3,500	3,500	n/a		2	1	Long waitlist	Entry Fee Required (Reimbursable from 0 to 90% upon vacancy; rent inclusive of basic services including meals, activities, utilities, cable, etc.; 3 min wealth required
Heritage at The Plains at Parish Homestead:															
Independent Living	Oneonta, NY	64	n/a	50	14	n/a	n/a	\$4,000-4,400	\$4,500-4,625	n/a	n/a	2	2	n/a	Rent inclusive of basic services including meals, activities, utilities, cable, etc.); continuum of care from indep to assisted living; no entry fee
Assisted Living	Oneonta, NY	28	28	n/a	n/a	n/a	\$ 3,900	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
Brookdale (Independent Living)	Clinton, NY	84	n/a	48	36	n/a	n/a	\$ 2,700	\$ 3,500	n/a	n/a	3	3		Independent Living; rent inclusive of basic services including meals, activities, utilities, cable, etc.; no entry fee

Figure 22B: Senior Housing Near Rome, NY

Source: Interviews with Gary Holeck of Preswick Glen and Daniel Orozco of a Place for Moms

Preswick Glen is an independent senior living community built about 2007 and located at 55 Preswick Drive in New Hartford, NY. It is located adjacent to the Presbyterian Home and was noted as a desirable example to consider for the Woodhaven Site. Obtaining specific current pricing information is difficult as the facility wants to first meet with its potential resident to go over the various options for entry fee, minimum wealth requirements, etc., before disclosing the entry fee. However, a 2006 report was found that indicated an entry fee of \$50,000 to \$231,000 that has a sliding scale refundable amount of 0 to 90% upon departure. In addition to this entry fee, a monthly rent above \$2,000 was also stated in the document. Preswick Glen is a not-for-profit facility that targets the 60 years plus age group and is reported to be exempt from property taxes. Potential residents must have a minimum savings of \$500,000 through pension, income or sale of their existing home. Although this information is dated, the reality is that the facility pricing in 2017 (and therefore the residents' required income and savings) would be expected to be much higher.<sup>46</sup> In fact, based on a conversation with Gary Holeck at the marketing group of Preswick Glen, the monthly fee is now approximately \$3,500 per month for all units after the entry fee is paid. He also indicated that although there are a few residents who come from out of region, the bulk of the residents previously resided in the New Hartford, Clinton and Utica communities prior to moving to Preswick Glen. Gary also indicated that the one-level cottages have a long waitlist as well as the larger two-bedroom apartments, but that the one-bedroom apartments are generally the ones available for rent.

Brookdale Independent Living and Heritage at The Plains at Parish Homestead are two other senior housing facilities that offer independent living and no entry fee. However, Parish Homestead is often considered a more desirable facility as it better allows seniors to age in place by offering both independent and assisted living. Monthly rent at these facilities are \$2,700 at Brookdale and \$4,000 to \$4,400 at Parish Homestead for one-bedroom apartments. Two bedroom apartments range from \$3,500 and \$4,500 to \$4,650 per month, respectively. As with Preswick Glen, the monthly rents at all three facilities include three meals daily, utilities and cable, programming activities and other amenities, but do not include any medical related services.

The three senior housing properties have high occupancy levels although smaller one-bedroom

<sup>46</sup> Source: Questions and Answers, Preswick Glen, Inc. Real Property Tax Exemption, Updated 2006



units are less popular than the larger units. Local area seniors appear not to be able to afford these types of senior housing facilities on their own accord based on economic and demographic information, even with the sale of their home. These residents may receive additional sources of income such as the financial support of children or other relatives, assistance through organizations such as veteran-related groups, etc. that makes these facilities attainable.

The high occupancy levels of the senior housing properties identified in Figure 22B may appear to show a potential opportunity for senior housing at the Woodhaven Site. But an extensive market study, understanding not only the market and feasibility of the real estate, but also the operations of a senior living business is necessary. This analysis is especially required if any level of resident support and/or medical assistance will be administered, such as for assisted living, Alzheimer's or continuum of care facilities, as payment and/or reimbursement for these services is based on private payments, health insurance, Medicare and/or Medicaid and the likelihood to receive these funds.

With the services required by an aging population, it is difficult to keep upscale senior housing product in the affordable range and receive payments due. If a developer can make this type of scenario work with tax incentives or other financial products, this product may be appropriate abutting the other single family neighborhoods that abut the Woodhaven Site. Additionally, it should be noted that most seniors prefer one-level living.

## **B. Commercial Real Estate-Office**

### **National Office Market Outlook**

According to CBRE<sup>47</sup> the United States office market has been strengthening. The overall national vacancy rate decreased by 10 basis points to 12.9% in the second quarter of 2016, which is the lowest level since 2008. The suburban office market picked up the greatest absorption but the downtown markets overall performed better at 10% vacancy. National construction totaled 9.7 million square feet in Q4 2016, which is down slightly from the previous average, but on par with 2015. This trend indicates overall industry confidence in the office market.

### **Upstate New York Office Market**

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<sup>47</sup> Source: CBRE, Marketview Q4 2016, Albany and Buffalo Office Markets

As Rome is a smaller regional sub-market with limited inventory, the major relevant data sources and the related brokerage research firms or institutions do not track its office market trends. However, it is important to get a sense of the office market in the closest tracked major markets. The most proximate markets that are tracked are Buffalo and Albany, both located on either side of Rome in upstate New York.



Figure 23: Location Map Rome, Buffalo, Albany Markets

**Buffalo** is the largest upstate commercial real estate market and is located 190 miles west of Rome. Overall the vacancy rate for office space is 12.5% and declining, which is positive news. Additionally, Buffalo is outperforming the National vacancy rate of 12.9%. According to CBRE, the overall net absorption in the first 3-quarters of 2016 was 337,145 SF, which is substantial. The Downtown Buffalo market is a bright spot of activity while the suburban markets are flat. This trend seems to be a national trend. While historically the suburban market was often

preferred, the younger workforce prefers the downtown office setting as opposed to a corporate suburban office park. **Major driver to the absorption was the healthcare industry, which are not only a tenant but a major driver for new construction.** Class A space is quoted at rental rates of \$22 to \$26 per square foot, which is respectable. The overall inventory of Class A office space is 4.3 million square feet in the Buffalo CBD. Class A is the most desirable as tenants continue to move towards quality space and are drawn to a “live, work, play” experience in amenity filled buildings. <sup>48</sup>

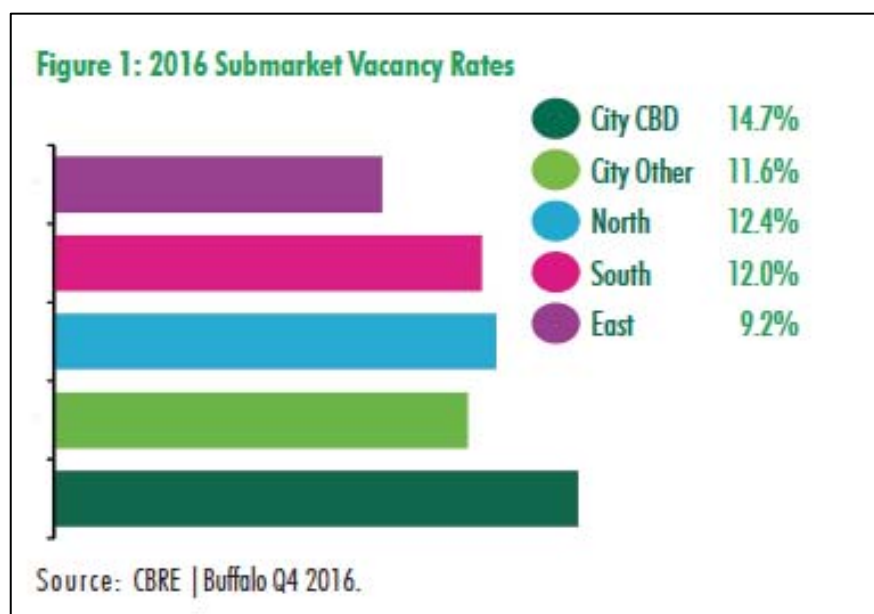


Figure 24: Buffalo Vacancy Rates, CBRE MarketView Q4 2016

**Albany** is also tracked by CBRE. Albany is located 110 miles southeast of Rome and is included in what CBRE terms the Capital Region office market. Overall the Capital Region showed vacancies of 12.1% and declining with an average lease rate of \$16.74 per square foot, but also declining. Overall absorption in the previous years was over 300,000 square feet, which is respectable. However, what is noteworthy is the strongest submarket of the region is Saratoga. Saratoga is a small downtown but the vacancy rate is 1.7%, which is very tight and will most likely stimulate new construction. Of course, it must be mentioned that Global Foundries is located in nearby Malta, NY, just 13 miles south, and Saratoga offers a very desirable downtown option.

There is a definite link between unemployment and office occupancy levels. The Capital

<sup>48</sup> CBRE, Marketview, Buffalo 3Q2016 Office Market Outlook

Region's unemployment rate was 4% fourth quarter 2016 which is far superior to the national level. This rate reflects the continued stabilization in employment. Overall, the New York State unemployed rate was 4.5%. The Capital Region has the lowest rate among upstate cities.

Due to the demand for office space in and around Saratoga, the Saratoga CBD has the highest asking lease rates of over \$22 PSF.

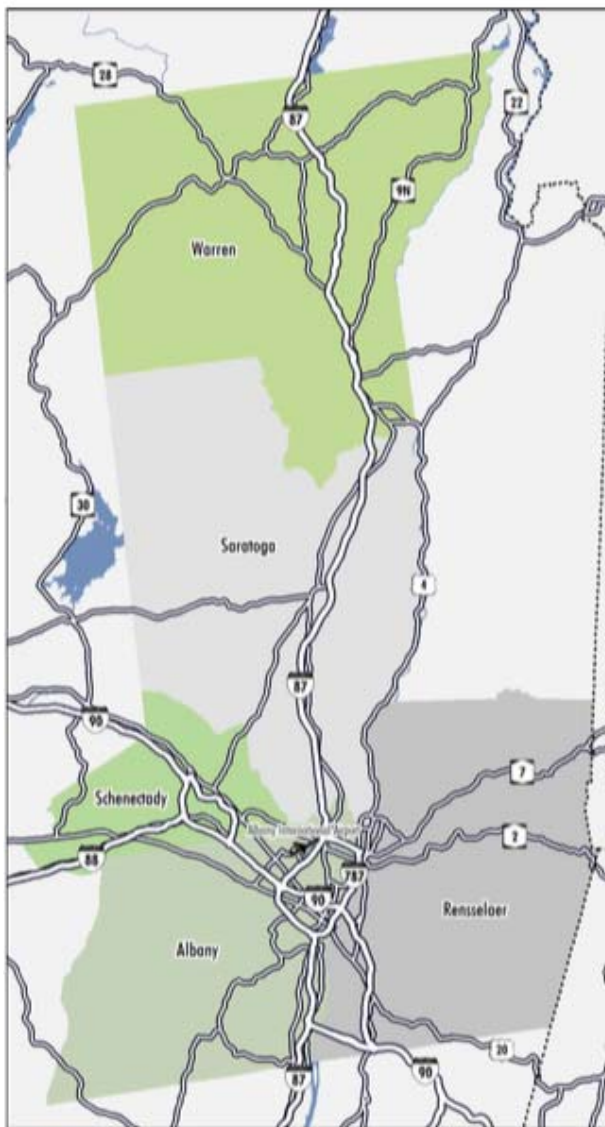


Figure 25 : Albany Capital Region Commercial Market Boundaries



Source: CBRE 2016

MARKETVIEW ALBANY OFFICE					
Figure 2: Market Statistics					
Market	Total Inventory (Square Feet)	Vacant (Square Feet)	Vacancy Rate %	Under Construction	Asking Lease Rates (Per SF, Full Gross)
Albany CBD Total	4,759,818	1,020,900	21.5	-	\$17.31
Class A	1,152,793	334,012	29.0	-	\$22.09
Class B	3,401,738	553,445	16.3	-	\$15.56
Class C	205,287	133,443	65.0	-	\$12.21
Glens Falls	1,126,951	139,719	12.4	-	\$14.40
Saratoga	618,747	10,251	1.7	-	\$22.36
Schenectady	1,943,424	57,510	3.0	70,000	\$15.40
Troy	1,320,751	88,615	6.7	-	\$15.71
Suburban Total	19,589,624	2,240,847	11.4	187,000	\$16.64
Albany	13,965,903	1,852,954	13.3	-	\$16.88
Saratoga	2,655,431	247,531	9.3	60,000	\$16.07
Schenectady	419,976	27,467	6.5	37,000	\$13.99
Rensselaer	2,548,314	112,895	4.4	90,000	\$14.24
<b>Total</b>	<b>29,359,315</b>	<b>3,557,842</b>	<b>12.1</b>	<b>257,000</b>	<b>\$16.74</b>
Source: CBRE—Albany Research, H2 2016.					

Figure 26: Albany Market Office Vacancy and Lease Rates

## Rome Market:

*Understanding the Impacts in Rome of the Marcy Nanocenter Project* dated September 2016 was a report prepared for the City of Rome by Camoin Associates to understand the potential spinoff of the Marcy Nanocenter as it related to office space demand in Rome. The report estimated demand for at least 75,000 square feet in the region from the spinoff effect, however, they also estimated that Rome may only obtain a portion of new office development. Nevertheless, a major announcement was made in December 2016 which has significantly altered the office demand estimate by Camoin Associates in their report, which assumed the

occupancy of the Marcy Nanocenter by AG. Ams announced that it was backing out of the Nanocenter project, and therefore the eventual estimate of 4,000 to 5,000 direct jobs is no longer on the horizon at this time. While GE is still on schedule to be fabricating at Quad C beginning May 1, 2017 and eventually bringing an estimated 850 jobs to the area in the next ten years, it is a small portion of jobs that were anticipated by AMS. Interest continues for the Marcy Nanocenter site, as recently as a Taiwanese's company was inquiring about it<sup>49</sup>, but the shovel ready site has been no commitment on record at this time.

Even if ams AG had not called off their plans to occupy the Marcy Nanocenter, Camoin Associates' previously estimated 75,000 square feet of spinoff regional office demand, may or may NOT all come to Rome. If Rome were fortunate enough to capture all of the demand, all of the anticipated office space could easily be absorbed in the GBTP and/or in available office space throughout Rome. The GLDC advertises on its website that there is 19,000 sf of existing dedicated office space currently available. In other words, there is no reason that the anticipated additional office space would need to be constructed at the Woodhaven Site as there are more favorable options for using either existing available office buildings in Rome, although they are typically Class B and C spaces, or new development could occur in the more symbiotic community of GBTP with better infrastructure and access already in place.

## Development/Redevelopment in Rome

**Griffiss Business and Technology Park:** As of December 2016, 79 businesses occupied GBTP employing 5,784 people. The GLDC was established to oversee the leasing and sales of land and existing buildings in the GBTP in addition to a variety of other tasks. As reported earlier in this report, GBTP has the following office, distribution and warehouse spaces available:

Griffiss Business and Technology Park Available Existing Properties				
Location	Use	Size (sf)	Rent vs. Purchase	Description
5865 Success Drive	Distribution Center	290,560	For Sale	Former Rite Aid Distribution Center
7900 Turin Road/The Beeches	Office	19,000	5-Year Lease Min	Former Professional Center
7901 East Dominick Street	Retail/Office/Warehouse	30,188	Sale or Lease	Former Auto Dealer
<b>Total</b>		<b>339,748</b>		

<sup>49</sup> Source: Observer-Dispatch, *UPDATE: Picente to Electronics Firm: Come to Marcy*, Jan. 25, 2017

*Figure 27: GBTP Existing Space*

Source: Griffiss Business and Technology Park website

In addition, there are 400 acres of land currently available for sale for development, both within GBTP and in the City of Rome. However, as more sites are "cleaned up" and/or obsolete buildings demolished, more land will come available. For example, currently 25 acres are about to come online with the demolition of Building 240, across the street from the Hampton Inn and adjacent to MVCC.

Most of the GBTP commercial space that has been occupied has little to no vacancy.

**Rome Supply:** In greater Rome, the supply inventory is approximately 1.4 million square feet. However, most of the inventory of office space is either Class B or Class C. The overall vacancy levels are quite low, at 3.8%. It was also reported that the rental rates were averaging \$10.57 per square foot and falling. While this data is not supportive of additional inventory, the mere fact that office supply is so old and outdated does in itself suggest that the inventory may need to grow in order to attract office space users that may consider locating to Rome.

In terms of new supply, none is proposed at this time, but there are sites ready and available for redevelopment at GBTP.

**Rome Demand:** According to Camoin in the same referenced above report only 8,700 square feet of space has been absorbed per year in Rome for the last ten years. Average rents are reported to be Under \$11 per square foot but asking rents appear to be pushing the rates higher to \$16 to \$18 per square foot per spaces as shown on Loopnet. However, with no new net job creation, it is difficult to support the feasibility of building new office space in Rome, despite the dominance of older office and lesser quality office space.

So the question is, what is needed to drive new space? The answer is more job creation, locally, in the county and the region and then the ability of Rome to capture some of these jobs in Rome itself. As a general rule, the average office worker uses between 200 SF to 250 square foot per employee. Therefore, if say 100 new jobs were created and attracted to Rome, then approximately 20,000 to 25,000 SF would be absorbed. Currently in GBTP, there is a 2-story newer building completely vacant that could satisfy that demand.

Office name	location	description	rent	Available SF	vacancy	Comments
Phoenix Drive	Phoenix Drive, Rome, Griffis park	1 story newer building	\$16-\$18/SF	3500	25%	Tektronix also in bldg.
Griffis Park	Daedalian Drive, Rome	2 story new	\$16-\$18/SF	20,340	100%	

Source: Loopnet

Figure 28: Advertised Griffis Available Properties

Rome Office Market Essentials							
New or Proposed Space 2016	Rental Rates	Inventory SF	Vacancy 2016	ROME Average annual absorption since 2008	Average space in SF per worker	overall discussion	
0	\$ 10.57	1,464,000	4.0%	8700 SF	250	overall market is weak	
Marcy Nano center expected to create demand similar to Saratoga	falling by 12 to 20% from demand weakness	no new space since 2012		mid-scale medical office for multi tenant and clinics has market, especially with aging population		Rome and the County are expected to lose 452 jobs, so no drivers for new space	

Source: Camoin Associates, Eire Blvd BPA Market Analysis: Rome NY November 2016

Figure 29: Rome Office Market Overall Occupancy and rates



Net Absorption (Square Feet)			
	BOA	Greater Rome	Oneida County
2016 YTD	0	4,000	(14,520)
2015	0	(100)	126,801
2014	0	11,828	29,337
2013	0	1,810	(47,968)
2012	0	(328)	(123,217)
2011	0	43,179	9,023
2010	0	7,097	84,485
2009	0	24,985	345,535
2008	500	30,278	181,566
2007	-500	(40,726)	48,895
Total	0	82,023	639,937
Avg. Annual (2007-2015)	0	8,669	72,717

Source: CoStar

Figure 30: Greater Rome Office Space Absorption

Office Inventory by Class (2016)							
Geography	Class A		Class B		Class C		Total Sq. Ft.
	Sq. Ft.	%	Sq. Ft.	%	Sq. Ft.	%	
BOA	0	0%	5,907	7%	78,535	93%	84,442
Greater Rome	0	0%	654,155	45%	809,952	55%	1,464,107
Oneida County	122,760	1.5%	5,596,353	67%	2,654,226	32%	8,373,339

Source: CoStar

Figure 31: Office Inventory by Class

Source: CoStar and Camoin Associates

In conclusion, Rome still has some time before it will be a strong development market. This leads us to assume that the GBTP will only be attractive for new office development once new jobs, in the range of 100, are created which would then support approximately 25,000 square feet of office space. If 400 new jobs were to be created, then a substantial amount of office space, over 100,000 square feet could be supported. Therefore, it is a small dilemma, the market needs the Class A space to be attractive, but the historical job creation is not supportive of its construction. Therefore, a conservative approach would be to wait until jobs are announced and have sites ready for redevelopment within a 12-month period. In the

meantime, 3,500 square feet co-working space would be recommended for the Woodhaven Site for several reasons. First, it is an essential amenity to the Millennials and entrepreneurial workforce that Rome needs to attract and compliment the proposed new housing. Secondly, it is membership driven, so it doesn't need a long terms lease commitment and the overall space is small enough that it would not flood the market.

### C. Commercial Real Estate—Industrial including R&D

As presented in the Camoin Associates *Real Estate Market Analysis: Erie Boulevard Brownfield Opportunity Area & the City of Rome, NY*, dated November 2016, the Woodhaven Site also does not support Industrial real estate development. Currently there is excess industrial space available in Rome. And within Rome, the GBTP has both available industrial property and land for development and this location provides superior access through rail, more direct and accessible roadways to access the New York State Thruway and even air access, if warranted. Also GBTP offers a cohesive and symbiotic community with designated zoned areas by use, linked by trails and flanked by amenities such as sculptures and golf course, to name a few, that offers an industrial space users a more desirable location to the Woodhaven Site.

### D. Hospitality

**National Trends:** Marcus & Millichap reported in their 2016 *U.S. Hospitality Investment Forecast* that overall national hospitality trends indicate a rising business traveler trend that will support hospitality demand in 2017.<sup>50</sup> According to the same source, in 2016 Average Daily Rate ("ADR"), Occupancy as well as Revenue per Available Room ("RevPAR"),<sup>51</sup> key hotels indicators, will reach the seventh year of consecutive growth in 2016 but these levels are expected to taper in 2017. Based on the strong past performance, over 100,000 rooms are expected to come on line, resulting in a 1.6% increase in supply. National average occupancy is expected to be around 65.9%, therefore, any local occupancy figures above this rate would indicate trends locally that are beating that national average. National average ADR was \$125.41 in 2016 and is expected to continue to rise. RevPAR is expected to increase over the 2016 level of \$82.64. Again, national rates are baseline to local and regional rates.

Anticipated stable hiring and modest economic expansion with wage growth and relatively low

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<sup>50</sup> Marcus & Millichap, 2016 U.S. Hospitality Investment Forecast

<sup>51</sup> Definitions: ADR –average daily rates, room revenue by room sold; RevPAR- revenue per available rooms, which is calculated by room revenue divided by rooms available. Occupancy is rooms sold divided by rooms available.

gas prices lead the economy into the seventh year of expansion. This expansion supports business hotel usage.

In 2015, U.S. leisure and business travelers hit the road in greater numbers and generated record levels of room nights and room revenue. Brands continue to open new locations but these new openings led to slower growth in 2016 with over 110,000 new rooms. As such, in 2016, hotels employed pricing power to keep occupancy levels high. End of Year 2016 occupancy is expected to be 65.9% but pricing will flatten. Most new rooms are select-service tier and mostly in the largest 25 U.S. markets. Lastly, the strength of the U.S. dollar will low visitation from visitors from abroad including Canada.

In terms of investment outlook, Marcus & Millichap are reporting that in 2016 the market is active for the extended stay category of hotel, especially on the upper midscale and upscale brands. Tight conditions in the overall apartment sector will continue to support demand for short term accommodations provided by extended stay assets including Homewood Suites and Residence Inn and this offers opportunities for new investment.

## Northeast Region Hospitality Trends

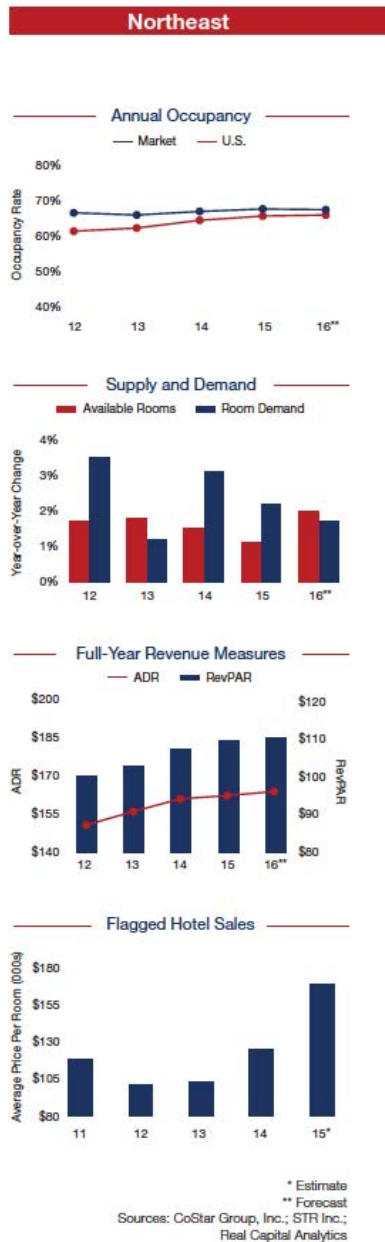


Figure 32: Northeast hotel trends

However, according to Smith Travel Research ("STR"), higher rate domestic business may increase demand to balance drop in foreign visitors, especially Canadians. To encourage visitation, even numerous soft brands have provided an alternative value enhancement strategy



for investors who are interested in unaffiliated brands. Trades in upper midscale hotels were unfaltering demand especially for chains. Typical pricing was strong starting at \$70,000 per key for sales.

In the Northeast region, 24,000 new rooms are expected in 2016. Annual occupancy is expected to slip to 67.2%, which is still above national baseline. ADR will advance, with most demand and room rate increases coming from New York City.

**Local Rome Hotel Market:** Rome is included in the greater Utica-Rome MSA. With Rome and Utica only 16 miles apart, the demand for room nights may come from the same demand sources at times. In addition to the Utica and Rome downtown markets, there is also a casino market in nearby Vernon, which may induce overflow demand for rooms in Rome and Utica during peak demand periods.

However, there are two key demand drivers for hotel rooms, business and leisure. As Rome is not a significant resort or destination market, it would be expected the new hotel investment and the demand for rooms would be generated from business travelers as a primary source. Casino hotel demand is mostly being met by Casino hotels.

There exists over 50 properties within 30 miles of the Woodhaven Site, yielding a supply of 3,000 rooms. The properties range from independent motels in the economy range that are over 50 years old, to several that are mid and upscale branded properties. Within Rome, there are two more mid-tier branded properties, the Hampton Inn and The Wingate by Wyndham, which offer a total of 174 rooms to the typical business traveler to the area. In addition, there is an independent product called Griffiss Park Suites, which targets long-term stays, with a minimum of a one-month commitment. Overall, these two (2) hotel products are 63,510 room-nights and the long-term rooms account for 35,405 rooms nights. While the total room-nights are almost 100,000 from these three (3) key properties, overall, the choices are limited, especially for long-term business occupancies<sup>52</sup>. There are superior products in the brand extended stay market that offer significantly more amenities to the long-term traveler than Griffiss Park Suites, which their management reports have an almost sustainable 100% occupancy at a rate of approximately \$35 per night for furnished one bedroom suites. The Hampton Inn management reported that they also get extended stay visitors at their property. Even local apartments sometimes absorb long term hotel stays when the market is saturated.

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<sup>52</sup> STR Trend Report, March 2017

**Rome Comparable Hotel Demand Market:** Data was analyzed from STR for the most comparable, mid and upscale properties located in Rome and Utica and not directly associated with the Vernon, NY casinos. These properties provide a reasonable assessment of the occupancy and rates that would be available to a new hotel property if built at the Woodhaven Site. In addition, only brand name hotels were selected that have significant marketing and brand recognition. Brands represented were Hilton, Marriott and Wyndham, Radisson and Intercontinental. Economy, independent and casino properties were not requested in the report as they were anticipated to skew results.

Overall, for the selected hotels, occupancies are on the rise and almost at national averages, which is significant for an upstate NY hotel market. In addition, along with 65.5% occupancy, their ADR average and best rates are lower than national averages, but rising, which are positive demand indicators. Room night demand is rising as well which indicates support for these properties.

Most room night demand comes in August and September which generally represents a waning leisure market and an uptick in business clientele. An examination of the most popular occupied nights indicates Tuesday and Wednesday, which is typically when business travelers stay at hotels. However, the highest room rates occurred on Saturday nights, which represents the leisure traveler as business traveler usually book rooms at lower negotiated rates.

**Findings:** Overall, there is sufficient demand in the hotel market to support a new hotel. However, caution would be suggested as 100 new rooms in the market would represent 60,000 room nights which at 65% occupancy, that is 39,000 room nights which is almost a 37% increase in filled rooms over the existing 5 hotel properties that reported filled. However, what can be noted is that all of the competitive supply for the 3,000 total rooms in the Rome-Utica market is either one of the following:

- Economy no brand affiliation—generally lower rates and occupancy levels, 25% to 30% of total room supply
- Mid and Upscale brands linked to the casinos represent 10% of the rooms listed in the Rome competitive market
- The remainder, 55% to 60% are brand affiliated mid and upscale brands
- There is only one property, Griffiss Park Suites, that has no brand affiliation and meets the extended stay market at approximately 100 Rooms, or 3% of the 3,000 rooms and reports almost 100% occupancy

Therefore, the findings would indicate that the optimum new hotel product would be in the

upscale extended market property type. This new supply should be similar to a Marriott Residence inn with 1 bedroom and studio apartments with kitchen and washer/dryers. The rooms should be approximately 100 rooms new to the market, with pool (indoor), fitness and meeting room amenities. Room rates would be expected to be on the higher end, starting at \$123 ADR.

STR data summary		Peak Month	
March 2017	Average	High	(August/September)
Occupancy 2015/2016	63.50%	65.50%	73%
ADR	\$115	\$117	\$123
RevPAR	\$73	\$77	\$99
Supply in room nights	165,382	177,390	NAP
Demand	105,027	116,120	11,171
Revenue	\$12,000,000	\$ 13,600,000	\$ 1,372,999
Total 5 properites and 486 rooms			
Typically best months August and September			
Tuesday and Wednesday are most occupied			
highest RevPAR is Saturday night			

Figure 33: Smith Travel Research Summary of Data from Selected Hotel Properties

**Rome, NY & Area Hotels--Comparative Supply (Compiled by TWG March 2017)**

						Trip Advisors Published Rate		Google Review	Trip Advisor Rating (*Rank))	Distance to Griffis Tech Park			
Hotel Name	Address	Affiliations/scale	# Rooms	Year Built/ Renovated	Google Published Rate						Comments		
Hampton Inn Rome	1352 Floyd Ave, Rome	Mid upscale brand Hilton		98	2014 \$	119	\$	209	4.6	4.5 (1)	0.5	Interview with Kim Copeland at the hotel; Trip Advisors rate higher than achieved	
Wingate by Wyndham Rome	90 Dart Circle Rome	Mid upscale brand		76	2008 last major renovation	\$	101	\$	152	4.3	4.5 (2)	1	
The Beeches Inn and Conference Center/Inn at the Beeches	7900 Turin Road, Rome	Independent	70 Incl. 7 extended stay rooms	1955	\$	102	\$	102	4.10	4.0 (3)	2	exterior corridor motel; wedding venue target audience	
The Rome Motel	8257 Turin Road, Rome	Independent economy			\$	70	\$	60	4	3.0(4)			
Quality Inn	200 S. James St., Rome	Choice hotels brand		104	1963	\$	81	\$	76	3.3	2.0 (5)	0.5	
Relax Inn	145 E. Whitesboro St., Rome	Independent economy		57	1975	\$	64	\$	64	3.5	2.0 (6)	1	
Red Carpet Inn	799 Lawrence St., Rome	Economy chain		27	1965	\$	47	NAV	2.8	1.5 (7)	1		
Griffis Park Suites	80 Geiger Rod, Rome	Extended stay, independent efficiency apartments		97		\$	35	NAV	3.2	NAV	0	rents monthly-- converted dormitory, mini fridge, burner plate-- 30 min 30 day booking	
Vernon, NY:	15 miles SW--20 min drive to Griffis Tech Park												
Fairfield Inn and Suites	5280 Willow Place, Verona	Upscale Marriott brand		93							15	Bible conference center	
La Quinta	5394 Willow Place, Verona	Midscale		97							15		
New Hartford/Utica, NY:	15-20 miles SE, near Marcy Nanocenter, 20 min to Griffis Tech Park												
Holiday Inn Utica	1777 Burrstone Rd. New Hartford	Upper midscale, Intercontinental brand		100	1990	\$	113	\$	143		18	Intercontinental Brand	
Fairfield Inn and Suites Utica	71 N. Genessee St. Utica	Upper midscale, Marriott brand		79	2015	\$	134	\$	166		15	Marriott Brand	
Radisson Hotel Utica Center	200 Genessee St. Utica	Upscale brand		162	1981	\$	139	\$	95		16	Brand	
Hampton Inn Utica	180 N. Genessee St. Utica	Midscale upper		83	1990	\$	129	\$	118		15	Hilton Brand Just opened	
TownePlace Suites	4760 Middle Settlement Rd., Whitesboro	Midscale upper Marriott Brand, Extended Stay		85	2017 (April)						14	Extended Stay property; Rates range from \$149- \$164 per night	
Total Rooms Tracked by 3,000 STR within 30 Miles													

Figure 34: Rome Hotels, data compiled by TWG

Source: Each respective hotel website; TripAdvisor; Google



## E. Retail Real Estate

**Overview:** Consumers are increasingly using their mobile devices as the shopping process evolves. However, when shoppers go to a physical store, they expect a more personal shopping experience than ever before.<sup>53</sup> There are “7 Under The Radar Retail Trends for 2017s” posted by Forbes that Rome should consider:

1. Menaissance. Men are spending more, 13% more than woman. This is important when deciding how to mix stores and target a future audience;
2. Getting personal, artificially: Consumers have a digital footprint and it gives retailers access to offer their selection of products and increase sales;
3. Co-shopping means growing carts: Even regular shopping such as groceries is beginning to be divided up by family members. 60% of houses share shopping responsibilities, especially grocery. This could mean more sales;
4. Leaving home without it: People will begin to ditch the wallet and use mobile wallets. Many retailers are already using this by having easy to download apps for the purpose;
5. Small will be the next big: Demographic shifts, with aging baby boomers and the large and young Millennials and expectations will favor products and services that only local small business can provide. This will be extremely significant for Rome, which can leverage this trend by attracting local and unique retailers to any new programs;
6. Crowdsourced goods: This is all about democratizing access to people so now any brand, can affectively have direct and a real dialogue with it communities on a broad scale;
7. Digital marketplaces will rule: This means speeding up the back end process and getting consumers the products they want in the market place faster.

“What else?” What Forbes did not mention, was the continued trend of Amazon and online shopping to take sales away from brick and mortar stores. Amazon stands alone as the largest online retailer. Amazon does many things right from product reviews, to recommendations and most of all, fast delivery. This makes online shopping very much able to compete with the majority of brick and mortar shopping. Amazon offers small retailers the ability to gain a global

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<sup>53</sup> Forbes.com, Dec 28, 2016, “7 Under the Radar Retail Trends for 2017”

market. And now, if Amazon was not taking enough sales away from brick and mortar, it is opening a fleet of physical stores, primarily focusing on grocery. Overall, in terms of online sales, Amazon accounts for over 43%. In terms of online sales, the US Census posted that online, e-commerce sales accounted for approximately 9% of all retail sales and growing. As such, physical stores need to offer retail that is difficult for Amazon to compete with.

For Rome, the last trend is noteworthy. In a small regional market of approximately 62,000 people within a 30-mile drive, it is much easier for an online retailer to make an impact. It costs a lot of capital to set up a physical store and in a smaller market, this can be risky. Therefore, these trends are suggesting that Rome and new retail focus on physical retail that is unique and local and convenient, such as local produced groceries, creameries, secondary market organic or natural local goods. Millennials love organic, natural, local and sustainable, from IPA beer to Chobani yogurt and more. In addition, the other big necessity is grocery, which is something the online retailers haven't quite figured out yet. Lastly, food and beverage outlets, such as bar, restaurants and pubs are experience oriented retail space and there is nothing that e-commerce can do to compete in that marketplace. Since Rome is sandwiched between beer trails, pub/beer/grill and even wine bars could be a hit.

A further analysis was made of retail trends from a variety of sources. There are a few common threads that emerge. For example, Millennial is the demographic to watch. Urban and unique retail experiences were often noted. While Millennials are the demographics that need to be attracted back to Rome, offering them a unique, urban shopping experience is something that Woodhaven Site can accommodate.

Retail Trends that Drive the Future of Retail				
source	trend	data	favoritism	examples
newsroom.synchronyfinancial.com	urbanization	between 2014 and 2050 urban dwellers will increase to 66% of worlds population from 54%	urban location	
newsroom.synchronyfinancial.com	aging means shift to the city		urban locations	
newsroom.synchronyfinancial.com	urban consumption will be the global retail driver with 32 cities generating 25% of worlds retail sales		more downtowns	
newsroom.synchronyfinancial.com	Millenials are driving retail	9 million will increase spending by \$10,000 more each year	authentic experience in fast convenient way. And use mobile devices to purchase	
newsroom.synchronyfinancial.com	e commerce is now 9% of retail sales.		every brick and mortar retail needs a strong e commerce presence	
	pop up shops	18% of urban millenials export to shore in urban stores and want a unique experience .	short term urban invest.	Christmas clothing shops, cashmere shops, holiday focused shops
	indoor food markets		works in urban locations well	
	co-working and incubator spaces		urban location something funky from the west coast that could work here	
	Donation based coffee shops			
mediapost.com	experience based stores		urban, but unique and harbors	Bass Pro, and little Bits(circuit building, fall into the gadget category)
mediapost.com	smaller formats			urban Wal-Mart and target
mediapost.com	shrinking flexible and focused is urban theme			
mediapost.com	live, work play--need job growth, walkability and mass transit			

Figure35: Retail Trend Drivers

**Retail Demand:** Based on the earlier discussion relating specifically to retail demand in Chapter 4 of this report, Demographics of Development, it is estimated that between 27,000 and 39,000 square feet of new retail is in demand for Rome, with the strongest focus on food and drinking establishments as well as grocery.

Below is a sample of currently available retail space in Rome. An analysis was also performed, on a broader scale, of thirty properties for lease in the Rome-Utica market. Overall the rental rates in Rome are mostly asking \$12 per square foot but the range is from \$6 per square foot to over \$15 per square foot for New Hartford. Generally, there is a significant amount of available

space, and based on the thirty properties, the average vacancy is 58%, which is very high. The other commonality is that all of the retail is located in primarily unappealing strip centers with very few anchor tenants except for the former Office Depot site, which abuts a Wal-Mart.

In summary, based on properties available in Rome, the demand is not exceeding supply, but the Class B and C type of retail supply does not appear to be in synch with the Class A retail that is trending in today's market. None of Rome's retail is really urban, hip or unique. Therefore, while the demand is not suggesting a pent up market, it is suggesting that most of the retail is obsolete and whether or not there are vacancies, new Class A space is required to meet the previously calculated demographic retail demand.

Type	Street	City	Size SF	Rent	Est. Vacancy
New retail neighborhood strip center	Dominick	Rome	8370	\$12.50	56%
Rome Shopping Center	Taberg Rd	Rome	4700	\$12	24%
Strip center	E. Dominick	Rome	7100	\$6	100%
Former Office Max	Taberg Rd	Rome	23500	NEG	100%
Dunkin Donuts	Erie Blvd	Rome	3700	\$12	
Glenwood Shopping Plaza/community Center		Oneida	22500	\$8.5 to \$14	10%
<b>Source: Loopnet.com</b>					
Number of total retail properties	30				
Total SF available	54,000				
Rental Range	\$6.0	\$15			
Average vacancy	58%				

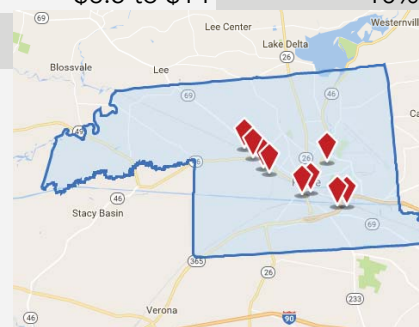


Figure 36: Retail Space in Rome Sub-Market, Sample of Available Space

**Retail Supply:** Within the greater Rome retail market that includes Rome, New Hartford and Utica, there is at least 2.3 million square feet of retail malls. The malls range in size from small big box stores such as the 65,000 square foot Bass Pro in Utica to the 880,000 square foot regional mall called Sangertown Square and several community centers and strip centers from 20,000 square feet to 400,000 square feet.



The largest mall is Sangertown Square in New Hartford. It is an upscale mall and is anchored by CVS, Dicks Sporting Goods, Macy's, JC Penney and includes a Target. Offerings include everything from clothes, sporting goods to household items and a pharmacy. It is highly trafficked and tenants that are inline small stores are renting for \$160 per square foot to larger footprints at \$36 per square foot and to \$18 per square foot for anchors. Generally, the rents are triple net, which means the stores all pay utilities and common charges over their base monthly rent. The inline store rents are high for this region and would suggest sales need to be over \$400 per square foot to survive at that rent.

The other mall rental rates appear to range from \$12 per square foot to \$18 per square foot but the lowest is \$6 per square foot for some neighborhood strip centers as reported on LoopNet.

## ROME MALLS

Name	Location	Size SF	Description	Rent	Vacancy	Key Tenants
Rome Shopping Center	Taberg Rd, East Rome	20,000	strip center	\$ 12.0	23.5%	
Mohawk Acres	Black River Blvd, Rome	156,000	Newer community Center, leasing by Brixmor	\$ 12.0	17.9%	Price Chopper, payless shoes, UPS store, Weight Watchers
Westgate Plaza	Erie Blvd W, Rome		ugly dated discount neighborhood center	NAV		cinemas, neighborhood center, Big Lots, Pzza Hut and Mc Donalds
Freedom Plaza	Erie Blvd west, Rome	213,000	Community Center that is well anchored	NAV	10.8%	and Brenda's Natural good across the street
Walmart Supercenter	Rome Taberg Rd, Rome	200,000	Discount department store--with poor retail	Owner occupied	0.0%	includes Tire and lube
Consumer Square	New Hartford	200,000	big box center'	NAV		Olympia Sports, Barnes and Noble, Pier 1, Bed bath and Beyond, Best Buy, Michaels crafts, Chipotle, Panera Bread--known for its plus size clothing
New Hartford Shopping Center	New Hartford	400,000	Community Center	NAV	1.3%	Herb Philipson sporting goods is key anchor'
Sangertown Square	new Hartford	880,000		\$100/SF for mid size stores like H&M, and less for anchors, probably most expensive space in the region	Sears closed mid 2015 but was almost immediately replaced by Boscov	Pyramid companies regional mall ANCHORED by best buy, CVS, DICKS, food court, JC Penny's, Macy's, Payless shoes, Target and indoor play area called BillyBeez
The Orchard	New Hartford	205,000	Community Center	\$ 18.1		75 stores including Kohl's, Ann Taylor Lofts Coldwater Creek
Bass Pro Shop	Utica in the Riverside Center at corner if I90 and route 5	65,000		NAV	0.0%	built 2014
Crossroads Plaza	New Hartford	91,000	Neighborhood center	\$8 to \$12	15.4%	
<p>Rental range \$6/SF (low end per LoopNet) most \$12/SF to highs c \$160 in most traffic are</p>						
<b>Estimated Total Mall Square Footage</b>		<b>2,319,000</b>			malls 0% to 18%	Range of Vacancy

Figure 37: Rome Malls

Source: Individual mall websites and [www.oneidacountytourism.com/shop/malls-and-shopping-centers](http://www.oneidacountytourism.com/shop/malls-and-shopping-centers)

Within a 30-mile time of the Woodhaven Site there is a fairly even supply of retail for demand with approximately 424,000 square feet of additional retail supported in the supply market. Within 15 miles there is a similar situation. The most likely categories of opportunity, which combined within a 15-drive distance, have 230,000 square feet of targeted retail that is supportable. Naturally, Rome and Woodhaven cannot capture all of the leakage, but it indicates that spending dollars are being spent outside the analysis area and therefore can be potentially re-routed to spend within the analysis area.

In terms of new supply or future completions, the City of Rome needs to consider that there are many projects under consideration in both Rome and neighboring areas that may be considering the same potential demand to support the proposed projects, regardless of type of real estate use. For instance, there are multifamily and retail uses being analyzed for development at the City of Rome Downtown and BOA site. Other announced projects that may also include retail are:

- Downtown Rome BOA -- 513 acres characterized by 364 potential vacant sites located within the City center, near the Erie Canal and Mohawk River, and the East Rome business park. The primary revitalization objective is to clean up and redevelop strategic sites for a variety of residential, commercial, office and recreational uses.
- Doyle Hardware, Utica. This is a mixed use 55 apartment building with retail. The retail will probably not be significant to affect Rome.

Finally, given that demand for retail for the Woodhaven Site has been established, some examples of some unique offerings may include:

- Farmers market or festival market place (year round)
- Mixed farmers food market on a large scale
- Unique restaurants, bars, pubs and grills
- Convenience retail to support apartments on site
- Food and grocery, unique and mid to smaller footprint, such as Trader Joes or Aldi

## **7. Comparables for Development**

The Woodhaven Site is a unique 110 plus-acre site near downtown Rome and abutting the GBTP. It also flanks the Mohawk River on the northwestern edge of the site. Challenges

include limited bus/transit service to select areas of the site (which may change when developed), good road access on the northern side of the site and an active airport to the east. To the north of the site are hotels, and active Route 46, a community college and other services. The central business district is approximately 0.5 miles southwest of the site. In summary, the Woodhaven Site has many assets and challenges and it is located in upstate NY with an encatchment area of approximately 62,000 persons. So while the site is large, the pool of residents and workers is relatively small, in terms of density.

In order to support the demographic and economic analysis and the real estate analysis with similar success stories, an overview of recent comparable projects was performed to suggest a potential image, uses, density, transit and other variables from which the Woodhaven Site may draw upon as examples of solid planning, financial options, density, and economic development impact. A matrix was prepared arraying four (4) comparable projects in the eastern United States. No comparable will be exactly like the Woodhaven Site, but there are similarities and very good lessons learned.

1. New Town, Williamsburg VA
2. Avalon, Alpharetta, GA
3. Storrs Center, Mansfield, CT
4. Kings Lynne, Lynn, MA

New Town was selected because the plan was set in a community that had very little development over the centuries and was surrounded by water (Chesapeake Bay head waters) and farmland. However, Virginia along the I-95 corridor, is quickly growing as bedroom communities to Washington D.C. As such, there was ample land with a potential to create a new urbanism environment from scratch. New Town has done this with a combination of commercial development, including ample retail, apartments and town homes. The core of the site is dense, rising over 5 stories with residential over retail and commercial. The design has a New England, colonial feel in keeping with the style of colonial Williamsburg. The density is enough to bring activities to support the retail and yet the atmosphere with style and parks is interesting enough to bring in traffic from visitors. Since Williamsburg is a tourist destination, the retail in New Town also is supported by visitation.






Avalon in Georgia was also a planned development from scratch. Atlanta is a growing tech and commercial center of the south yet there was no housing, outside the urban core, that was



appealing to the Millennial workers that are need to fuel tech employment. As such, Avalon was designed as a mini-urban center complete with apartments, retail and some office commercial. But it's real key to success is its workable/park atmosphere that makes it a destination to residents and visitors. People love the experience. It is approximately the same acreage as the Woodhaven Site, but the commercial components are more than the Woodhaven Site could support.

Storrs Center is an interesting comparable because it is also a new town center created from an old strip center near a university in the middle of an agricultural community. It was designed to meet the residential needs of the university but is so successful as a new urbanism example, that the retail and atmosphere is the hub of activity for Mansfield.

Kings Lynne is north of Boston. It was also an old colonial settlement but obtained a gritty backbone over the years. A public housing project that was originally successful had become partially condemned and boarded up. Residents, from within the community, started a plan through a grant, to rebuild the housing and community. Now, a subsidized housing community looks like a mid to upscale community complete with amenities such as pools, tennis courts, parks and more. It is a great example of how an obsolete community can be repurposed to be successful in today's environment.

Woodhaven	Comparable 1: New Town, Williamsburg, VA	Comparable 2: Alpharetta, GA	Comparable 3: Storrs Center, Mansfield, CT	Comparable 4: Lynn, MA
2020	New urbanism village, phased approximately 2000	use town center 2014--AKA, "urban 2016"		process started in 1970 to take the site change it from 1/4/ abandoned and condemned to revitalized
Repurpose of site of small home once housed Griffis Air Force workers.	develop a new urbanism housing and environment for the Town that had been underdeveloped for centuries	to provide housing and a destination to high tech workers in Atlanta	to provide housing and amenities to university	to transform a poorly managed, partially vacant, public housing that was partially condemned and develop America Park thriving and a mixed income community
Mohawk Edge, City of Rome	Endowment Association of the College of William and the C.C. Casey Limited Company	North American Properties	EDR and Leyland Alliance	Corcoran Mullins Jennison, Boston
MF housing, townhouse, hotel, SF retail, Co-working space, main space, parks, trails, farmers market space	300,000 SF of retail walking and bike trails, SF of office and research space, park's, school, movie theater	2.3 Million SF Inc. 390,000 SF of experience based shopping and dining, 105,000 SF of loft space, 250 upscale apartments, 101 S homes. And a 330 room hotel	625 apartments, 139,000 SF of retail, 41 townhouse and condos. New grocery, 273 multi family unit and 168 townhouse center, bookstores	
110 + acres	350 acres	86 acres	48 acres	58
Rome, NY, just east of downtown abutting Griffis Tech. Park, MVC trail network	Williamsburg, VA	Alpharetta, GA, 25 miles from downtown	Mansfield, CT	Lynn, MA, income restricted community
on site	private at units, on street and under building	structured, street and private for homes	on street, parking garage	free on site
TBD	NAV	Phase 1 was 2/3rd equity totaling \$200M ; \$131M in traditional debt from Wells Fargo BoFA	EDR is a REIT	LHAND
some bus stops	cars and buses, but designed as a walkable community	walkable surrounded by driving community	UConn shuttles	buses near T. Commuter Rail
1/4 mile east of downtown	Between the York and James River, original fortified Colonial Settlement	affluent Atlanta suburb	new village in agricultural college setting	urban, but pools, tennis, parking , community room, basketball
Griffis tech park	next to College of Williams and Mary and Br Gardens and historic sites	20 miles N/E of Atlanta	college campus and nature preserve	near Ocean, 10 miles north of Boston
62,000 within 30 mile drive	14,000 but 4 million annual visitors	62,000	25,000 students and 25,000 residents	90,000
proposed to primarily serve millennials, and empty nesters a retail for all residents and create lifestyle destination	proposed to serve people who live and work region and privately there was no " new urbanism development, just houses in the country	affluent and educated	farming, students, faculty, local residents	large Jewish immigrant population from 20th century, also Polish and Italian
Woodhaven	Comparable 1: New Town, Williamsburg, VA	Comparable 2: Alpharetta, GA	Comparable 3: Storrs center, Mansfield, CT	Comparable 4: Lynn, MA
primary over 25	families to empty nesters	all ages, primarily Millennial	all ages	all ages
there are almost no mid or upscale, for years the town was sleepy, but need apartment rentals that have significant boost of new housing to support the largest amenities as herein proposed	Small office, lots of concentrated retail and restaurants, very appealing	43,000 SF rented by Microsoft	medical, grocery, books, convenience, needed	no commercial
Not yet built	Nice quality colonial look with a modern twist	Plaza and green, fountains, plug and play entertainment on green, ice rink	fitness, retail, parking, on site manager concierge, new and secure housing	pool, tennis, basketball, fitness
transportation improved	Buses and cars, but very walkable	walkable but surrounded by driving community	university shuttles	MBTA
essential	yes	new neighborhood, but size and scale is enough to provide 24 hour activity and canNew urban atmosphere		Colonial town and industrial past
				

*Figure 38: Matrix of Comparable Developments*

Source: Project Individual Websites, Compiled by TWG

## 8. Findings and Conclusions

Based on the real estate development analysis, there are some areas of real estate opportunities that the Woodhaven Site can leverage and there are some caveats, and limitations that need to be addressed as well.

**Economic Findings:** Overall the regional economy of Utica-Rome is growing but lags behind the State of New York and the United States. According to the New York State Department of Labor, eight of the thirteen metro areas in the State of New York added private sector jobs over the last year (February 2016 to February 2017) at a faster pace than Utica-Rome. The most significant potential to boost employment and the regional economy will come with a tenant to the Marcy Nanocenter site. Although the community was disappointed about the withdrawal of ams AG in December 2016, in the long term it is expected that an estimated 5,000 jobs will be created in this tech-related industry as other tenants eventually come to this site.

Outside of the local casinos, the other major employment center of interest is the GBTP which recaptured not only the 4,500 jobs lost from the Griffiss Air Force Base closure in 1995, but currently has over 5,700 employees. The GBTP has significant growth opportunities, for example, the federal governments' recent renewal of GBTP as one of six unmanned aircraft systems ("UAS") sites nationally, both in terms of actual space and job creation option, and may even one day include the possible opening of the airport to commercial traffic.

The Woodhaven Site has close proximity and strong synergies with the GBTP. There are many potential engineering and tech job opportunities at GBTP but the inventory of housing to match the workforce is missing. As such, there is an opportunity for new development at the Woodhaven Site to provide housing support to GBTP as well as to a lesser extent, the eventual new workers to the Marcy Nanocenter and Quad-C. There are also some small and mid-sized commercial opportunities, such as Makerspace and Co-working space, that could leverage the jobs created at multiple locations by supporting innovation and incubation of industry.

**Demographic Findings:** Overall, the demographics of the City of Rome as well as the region indicate a population that is declining slightly but with household income that is approximately the same as the U.S. averages. Major disparity and limitations on economic development are noticeable in terms of education with the local and regional population coming up short in terms of bachelor and higher degrees. While recent history and the decline in manufacturing may have signaled young and educated populations to leave the area, the Marcy and GBTP workforce hubs need the educated individuals. Once again, the opportunity appears to be in the development of housing and amenities that would be attractive to this educated workforce that may be currently living outside of Rome where there may be interesting housing stock with urban and hip amenities, even in such far away locations as Syracuse.

**Real Estate Findings:** In terms of real estate, the market data shows potential for multifamily housing. This real estate category has the most real estate market data support of all real estate uses and is uniquely positioned to promote economic development by adding inventory to support regional job creation. However, more upscale, hip apartments, offering different size apartments, as well as complementary perks like recreational amenities and convenience type of retail, is needed to differentiate this apartment complex from others under consideration or already developed in the nearby markets.

**Multifamily:** There are two major sectors to residential, multi-family rental apartments and single family/townhomes/patio homes. Overall, the multi-family apartment rental is the most in demand nationwide and appeals to a demographic that Rome needs to attract, young college graduates and Millennials. Empty nesters are also a demand generator of the same products. The existing supply is very low on new, amenity rich, multi-family units. Demographics support new build. Meeting the needs of jobs created or eventually estimated at Marcy and GBTP also supports new build. Most of the existing supply is single family residential, and while older in stock, it is not the supply that is appropriate for a more commercial location, as the Woodhaven Site, and will require significant infrastructure without the density to create economic development or support of significant retail. Therefore, the findings support at least 150 units of upscale amenity rich apartments, primarily based on demographic (population) and workforce capture and affordability, phased over time and another 50 clusters townhouses that would appeal primarily to the empty nesters and young families.

**Hospitality:** Based on the trends in the market and local ADR and occupancy rates, a new upscale extended stay hotel in close proximity to GBTP would be in demand in the range of 100 keys complete with plenty of amenities including pool, restaurant, fitness and access to trails and shuttles to GBTP.



**Retail space:** Retail is interesting in terms of market support. Based on the demographic data, an estimated 27,000 to 39,000 square feet of retail is supportable based on spending income. There are certain unique categories that could be considered if programmed so as to not compete head on with the typical mall. An indoor/outdoor all season, large-scale farmers' market with specialty food and restaurants would be the most highly recommended. For example, convenience is needed to support the residential but also the need to create an active existing environment is crucial. Given Rome's proximity to the New York Beer Trail and even wine trails, there could be a linkage between local pubs, grills and the State support of this unique and regional industry. Nightlife, restaurant and pubs on site are essential ingredients to support the residents, and create a draw.

**Commercial Space:** Office and Industrial/R&D space has some market support but clearly would be in direct competition to available space at GBTP where there is already significant R&D and office clustering. Therefore, no office or R&D is recommended for the Woodhaven Site, except for Makerspace (linked to the local high school and community colleges) and Co-working space, as an office attraction for skilled workers and as a multi-family amenity.

**Other:** In addition to the market-supported real estate, it is recommended that event generating uses be a supplement, such as a year-round farmer's market. According to the City of Rome website, at this time, only a weekly farmers market is in operation in season. A year-round permanent farmers market would be suggested as a way of generating visitation and the market would appeal to the same residential audience that is being suggested for the Woodhaven Site.

**Conclusion:** To compliment the discourse related to real estate supported by market and economics, two distinct deliverables were developed to aid the planning process. First, a summary program for the Woodhaven Site arrayed by Live-Work-Play to distinguish between the residential market supported elements, the commercial real estate elements and the recreational amenities.

Rome Woodhaven DRAFT program March 2017									
Description	type of units	Target Audience	Units	Total SF Supportable	Typical rental rates	Size per unit	total units supportable	Discussion of Market Support	Amenities
<b>Live</b> Multi family rental housing	1 and 2 bedrooms	Millennials 25 to 35	150 units total		179,400 \$1,300	1 bedrooms 70% @ 800 SF and 2 bedrooms 30% or less @ 1000 to 1200 SF		Must be phased, 50 units to start.	Terrace, common pool, club house and fitness center, access to trails, access to co working space and retail and food and drinking on site
MF housing	2 to 3 bedrooms	Empty Nesters over 60	50 units total		137,500 \$1400 to \$1500	2 to 3 bedroom units, 1000 SF to 2000 SF, apartments and town homes		apartments or townhouse	similar to rental housing
Retail Amenities for Housing, hotel and visitors		Millennial, empty nesters and local businesses day workers	37,000 SF	37,000 after initial phase of housing	\$15 to \$20/sf		total 37,000 SF in phase 1 supported by new MF units on site and based on income capture		Food and drinking places, specialized grocery, convenience store, laundry, pharmacy with PO, hair salon
SF housing	3 to 4 bedrooms	empty nesters	0	0	not recommended			Dominant housing type is moderately priced SF housing. Local developers activity building units elsewhere. CBD needs density of housing to bring more residents in CBD to support retail. Lastly, potential to reopen airport is a planning conflict given noise with higher end housing and thus should be avoided	
<b>Work</b> Co-working space	1 based on membership with coffee shop and book exchange		3500 SF		3,500 \$200/month	3500 SF		Complimentary space and overall office maker has no support for new build	essential amenity to attract Millennials and foster new business
Maker space linked to HS Hotel			3500 SF		3,500			Maker spaces represent the democratization of design, engineering, fabrication and education. They are a fairly new phenomenon, but are beginning to produce projects with significant national impacts.	
Upscale extended stay		business clientele	100 rooms		\$120 to \$140 per 60,000 night	studio and 1 bedroom suites, typically 450 to 600 SF each	100 rooms plus amenities		Branded, such as Marriott Residence INN
<b>Play</b> Tourism Outdoors Sports Events Connections	use events trials great lawn concerts and continuous attraction Shuttle								Connections to trails is ESSENTIAL amenity to Millennial and Young Empty Nesters Great lawn can be multi-purpose for outdoor ice rink or soccer field in summer Great Lawn for summer events Shuttle connection to downtown and Griffs
<b>Other</b> Commercial office Farmers market and local crafts Industrial including R&D			flexible		0			Office product is overbuilt, high vacancies and low rents, no new development supported until existing inventory is further absorbed Rome has single day per week seasonal market-expand upon local good/crafts and more to a more year round market Industrial, R&D and related are all the specialty of Griffs and any new development in this sector would only dilute Griffs and with little Griffs growth and ample developable sites ready to go, Woodhaven is not a feasible option	Brand it-link to trails-the Wine to Brew Trail-and theme it differently than Utica

Figure 39: Woodhaven Draft Program Matrix

To support the program matrix, an Options Testing Matrix was developed to analyze the various real estate programs that were considered in the market analysis. The themed program options, such as multifamily housing, student housing or big box retail, were arrayed according to Live-Work-Play. Each themed program was analyzed according to market, physical and planning criteria. Within the major criteria, sub-criteria were developed. Each sub criteria were given a score of 1 to 5, with 5 being the best, to score each program. The themed programs that scored the highest were ultimately the programs recommended for the Woodhaven Site. The full Decision Matrix can be viewed in the Appendix.

## APPENDIX

### List of Interviews:

1. Steve Buck, Buck Construction
2. Dean Devito, Prime Companies Contractors
3. Justin Gualtieri, Rome Building Contractors Inc.
4. Andy Breuer, Heuber-Breuer Construction
5. Fred Arcuri, Senior Vice President Planning and Development, Mohawk Edge
6. Chad Lawrence, Deputy Commissioner, Oneida County Airport
7. Management, Griffiss Park Suites
8. Kim Copeland, Hampton Inn Rome
9. Katie, Marketing and Communication, Mohawk Valley Community College
10. Gary Holneck, Marketing, Prescott Glen, New Hartford, NY
11. Daniel Orozco, Senior Living Advisor, A Place for Mom (Heritage at The Plains at Parish Homestead – Oneonta, NY, Brookdale Independent Living – Clinton, NY)
12. **Anthony Ceroy, Vice President Development, KCG Development**
13. **John Verecka, President, CRM Rental Management**
14. **Gillian Conde, Vice President, DePaul Properties**
15. **Franca Armstrong, Dean of Rome Campus, Mohawk Valley Community College**

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### **Caveat and Limiting Conditions:**

The report herein is an analysis of market conditions relating to the Woodhaven Site located in Rome, New York as of Q1, 2017. The report does not predict future conditions nor can I predict future development projects which may or may not come on line and have an impact, positive or negative on the market findings herein. It must also be noted that there are employment factors including job creation for which many developers or planners are considering as a potential capture audience for other projects including housing and retail and commercial office. While our capture estimates are conservative there is no guarantee that other Cities, town or projects may include the same capture audience, which may impact the ability to accurately assess demand.

### **Testing Matrix (Separate Attachment)**



# Rome Woodhaven DRAFT

## Site Development Options Testing Matrix

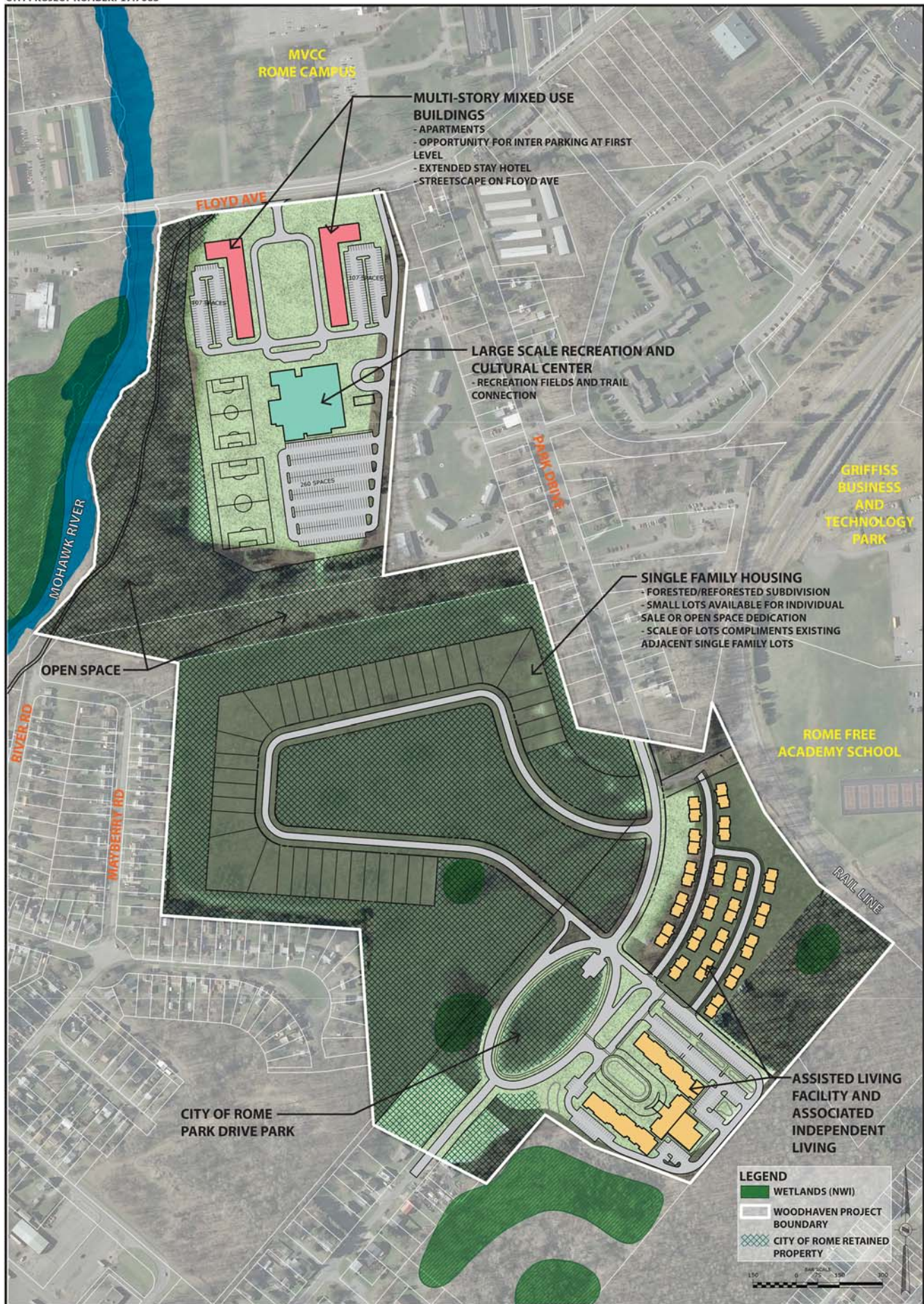
Theme	Casino attraction	Entertainment	Local Sports	Authentic Destination	Business and Education	Downtown repopulation	Water and Tourism	Cultural and Education	Office with a new twist	Services and Support	
Criteria	1. Family Resort Casino Inc. hotel and amenities	2. Year Round major sports/entertainment Destination Center	3. City Sports Park (outdoor venue)	4. Year round mixed use Farmers market and craft destination retail center including local micro brewery	5. R&D Park--linked to SUNY	6. Mixed-Use Housing Development--affordable housing and amenities plus retail	7. Eco Tourism and canal tourism center--Inc. boaters services, retail, event plaza	8. Education and cultural zone (Comm. College linked to industry)--including CC expansion with departments catering to business clusters plus waterfront history museum	9. Office/ retail mixed use development--live work lofts	10. Health Care offices/clinic/ senior center	Ranking Criteria ( 5 best, 1 least attainable)
<b>Economic</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	
Waterfront Development Opportunities	3	3	3	5	2	2	5	2	2	1	linked to waterfront and related activities
Real Estate Market Support	2	4	0	4	2	5	2	3	2	1	needs market support to score well
Job Creation	5	4	1	5	5	2	3	4	3	3	more jobs permanent the better
Site size and configuration compatible with market supportable real estate	2	5	1	5	5	3	5	4	5	3	market linked to site
BOA issues	2	4	5	4	3	1	5	4	2	1	more clean up required for residential related uses
Ability to create critical mass to support future development	4	4	1	4	5	3	4	4	3	2	permanent people on site year round
Positive Downtown Impact from development	3	4	1	5	4	3	4	4	3	2	off site impact
<b>Subtotal</b>	<b>3.0</b>	<b>4.0</b>	<b>1.7</b>	<b>4.6</b>	<b>3.7</b>	<b>2.7</b>	<b>4.0</b>	<b>3.6</b>	<b>2.9</b>	<b>1.9</b>	
Comments on economic	More analysis required to fully understand demand; comparable show primarily supported by local visitors, not a tourism destination	Has ability to create a major destination for fun and play oriented to families all year round and support more events	low impact, nice park--will have limited impact to due short seasons and limited major events	links to local industry, supports jobs growth from existing assets, tourism and destination attraction, supports boating traffic as a reason to stop	best for jobs, intrinsic on link between education and attracting a major high growth, high pay sector	re-populates downtown with more people to use services but must be linked to fed. housing for affordable units and somewhat privatizes the waterfront	oriented to the canal and tourism -bring in spending dollars from all over the north east--but seasonal bent unless able to include a winter attraction	region has low educational attainment and skills in demand in growth industries--this could help support long term business attraction	office is over supplied but housing work loft may have a way to support local ally based industry with incentives	young low income population --new services not in demand at this time	
<b>Physical</b>											
Vehicle access	1	2	5	4	4	4	4	4	3	4	significant traffic or traffic all at once could be difficult to accommodate
Interstate access	5	5	1	5	5	3	3	5	3	3	
Connection to transit	1	2	1	1	1	1	1	1	1	1	Unknown at this time whether transit could be accommodated to reduce congestion
Pedestrian connections	1	3	2	3	2	3	3	3	3	1	Ability to make pedestrian connection with downtown scores higher
maritime connections	4	2	1	5	2	2	5	2	3	1	use links to maritime elements scores best
Land Area to Facilitate Off-street parking	1	2	5	4	4	3	3	4	4	2	limited parking needs scores higher
Site size and configuration fits use	1	4	5	5	4	4	5	4	4	3	optimal sizing fits sites
<b>Subtotal</b>	<b>1.8</b>	<b>2.5</b>	<b>2.5</b>	<b>3.4</b>	<b>2.8</b>	<b>2.5</b>	<b>3.0</b>	<b>2.9</b>	<b>2.6</b>	<b>1.9</b>	

comments on physical	traffic impacts could be significant; critical mass needed may not fit on site	strong contender by no maritime links	no reasons to be located near interstate	has opportunity to spark local business, attract tourists and strong links to maritime	if, if this happens, best in the new jobs and may spark more downtown office growth	waterfront privatization is an issue	good for waterfront but demand but take significant time to develop	needs commitment form educational players	office market weak and privatization of waterfront is an issue	no real reason for being in this location	
<b>Planning</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	
Integration into City and link to downtown	1	3	3	5	4	3	5	4	3	2	blending
Neighborhood concerns	1	4	3	5	5	3	5	5	3	3	activity and crime prevention
Connection/ Potential open space/green areas	1	3	5	4	2	2	4	1	2	1	connections to parks and water
Image ability/asset to City/aesthetics	3	3	3	5	3	3	4	3	3	1	sets right image and tone
Proximity to Downtown uses	3	3	1	3	3	3	3	3	3	3	
Visibility	5	5	1	3	2	2	3	2	2	2	gateway enhancement
Synergy with adjacent properties & uses	1	5	3	4	4	3	4	4	4	2	1
Enhance tourism & visitor experience	2	4	1	5	2	2	5	2	2	1	gateway and waterfront
Land availability	1	3	5	5	4	4	5	3	3	2	right sized
Architectural heritage	1	2	2	5	2	1	5	2	3	1	preserves any sig. buildings
<b>Subtotal</b>	<b>1.9</b>	<b>3.5</b>	<b>2.7</b>	<b>4.4</b>	<b>3.1</b>	<b>2.6</b>	<b>4.3</b>	<b>2.9</b>	<b>2.6</b>	<b>1.7</b>	
comments on planning	While this use appears to be tourism oriented, over 70% of visitor to Turning Stone are local plus there are major negative impacts related to crime and addiction in an already struggling area	this is a high impact, complementary service use that could enhance tourism and quality of life	low impact, low cost, with some benefits	jobs, tourism, culture and authentic	jobs but may not need this site to be successful	while populates the area, it may not be the highest and best use	Tourism and major link to maritime is key asset	educational support is needed but not necessarily on this site	fits with concept of downtown core but does not need to be on this site	low population and impacts to traffic and no need to be located here	
<b>Total Ranking</b>	<b>2.2</b>	<b>3.3</b>	<b>2.3</b>	<b>4.1</b>	<b>3.2</b>	<b>2.6</b>	<b>3.8</b>	<b>3.1</b>	<b>2.7</b>	<b>1.8</b>	
	1. Family Resort Casino Inc. hotel and amenities	2. Year Round major sports/entertainment Destination Center	3. City Sports Park (outdoor venue)	4. Year round mixed use Farmers market and craft destination retail center	5. R&D Park--linked to SUNY	6. Mixed-Use Housing Development--affordable housing and amenities plus retail	7. Eco Tourism and canal tourism center--Inc. boaters services, retail, event plaza	8. Education and cultural zone (Comm. College linked to industry)--including CC expansion with departments catering to business clusters plus waterfront history museum	9. Office/ retail mixed use development--live work lofts	10. Health Care offices/clinic/ senior center	5 = highest 1 = lowest



# **APPENDIX D**

## **MASTER PLAN CONCEPTS**



City of Rome  
Oneida County, NY

## RETHINK WOODHAVEN MASTER PLAN OPTION A

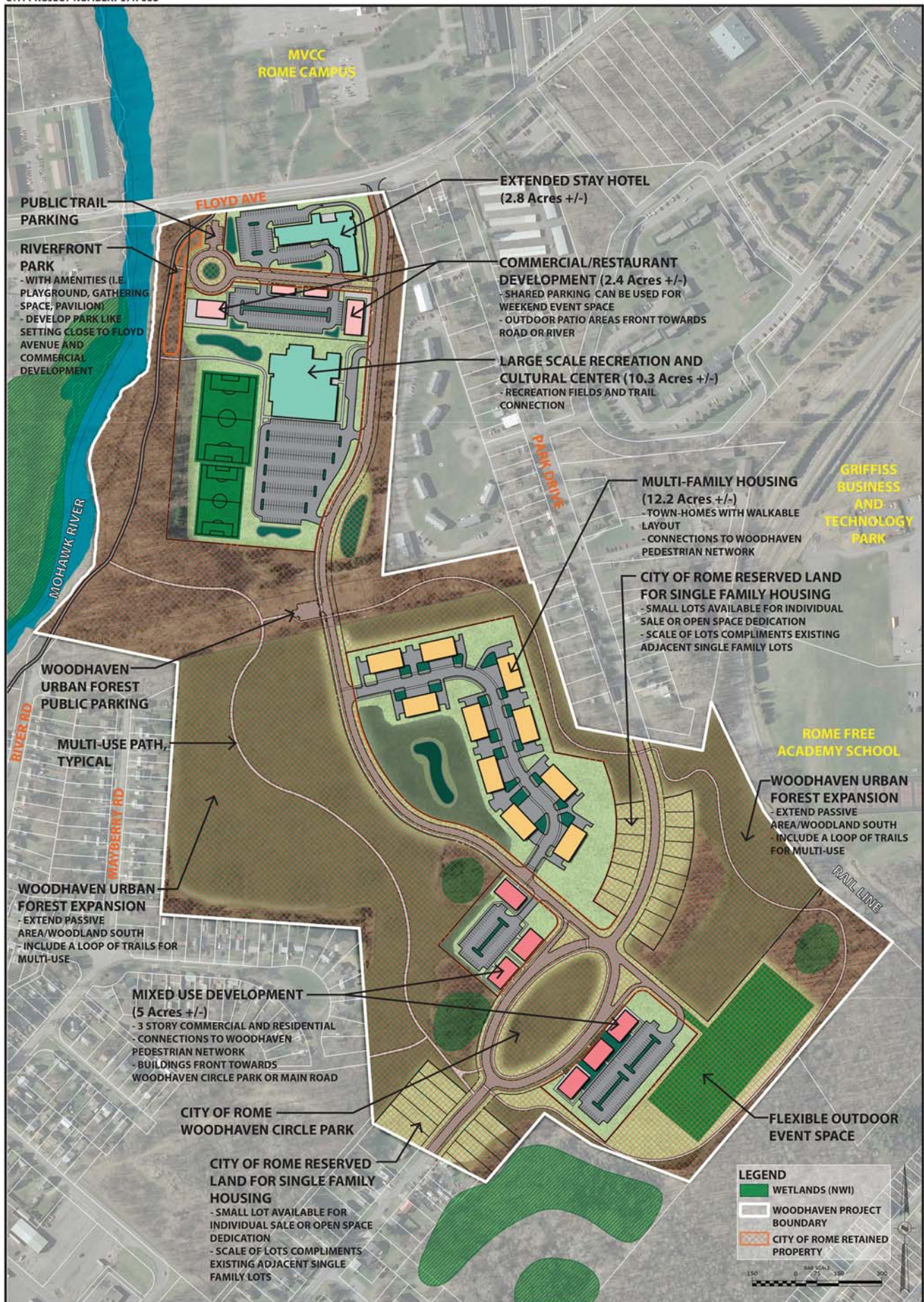
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UPDATED: 2017-10-19

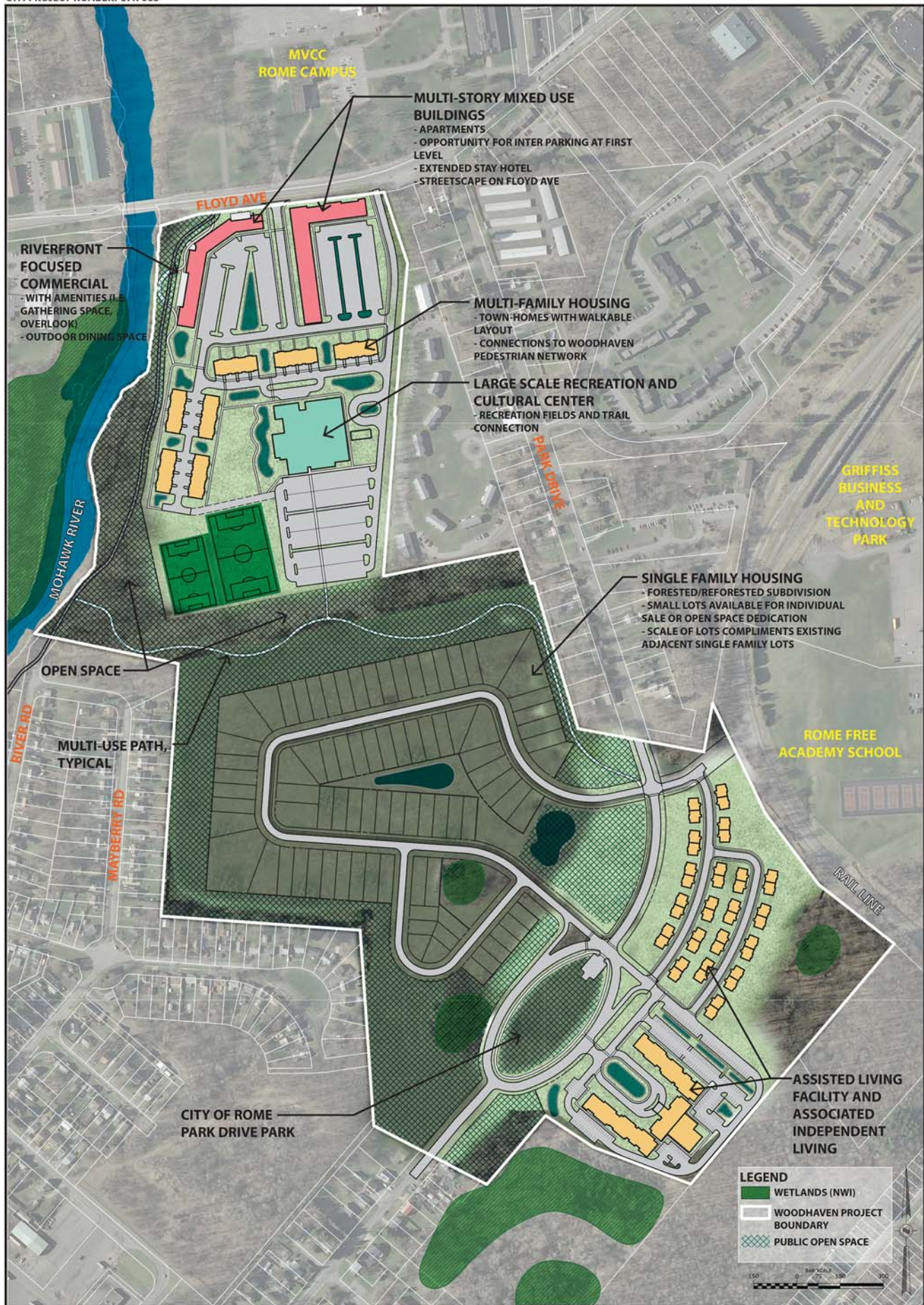


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City of Rome  
Oneida County, NY

## RETHINK WOODHAVEN MASTER PLAN OPTION C

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