



Town of North Haven POCD 2015 Update

Working Group Meeting
Economic Development
May 2016



Purpose of Today's Meeting

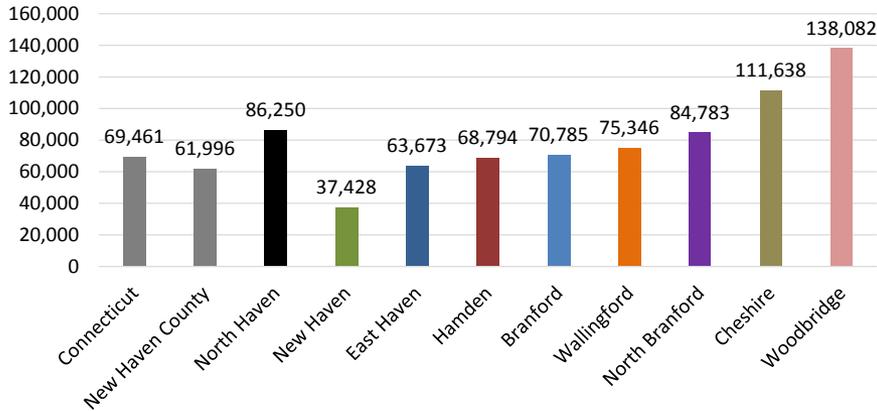
- Presentation and discussion of key economic indicators:
 - Income, Employment, and Labor Force Profile
 - Key Industry Clusters & Employers
 - Commuting Patterns
 - Fiscal Indicators
- Buildout Analysis
 - What/how much could be developed given current zoning?
- Redevelopment Areas
 - Station area, Town Center, and Upper Washington
- Feedback from Community Survey and May 3rd workshop



Income

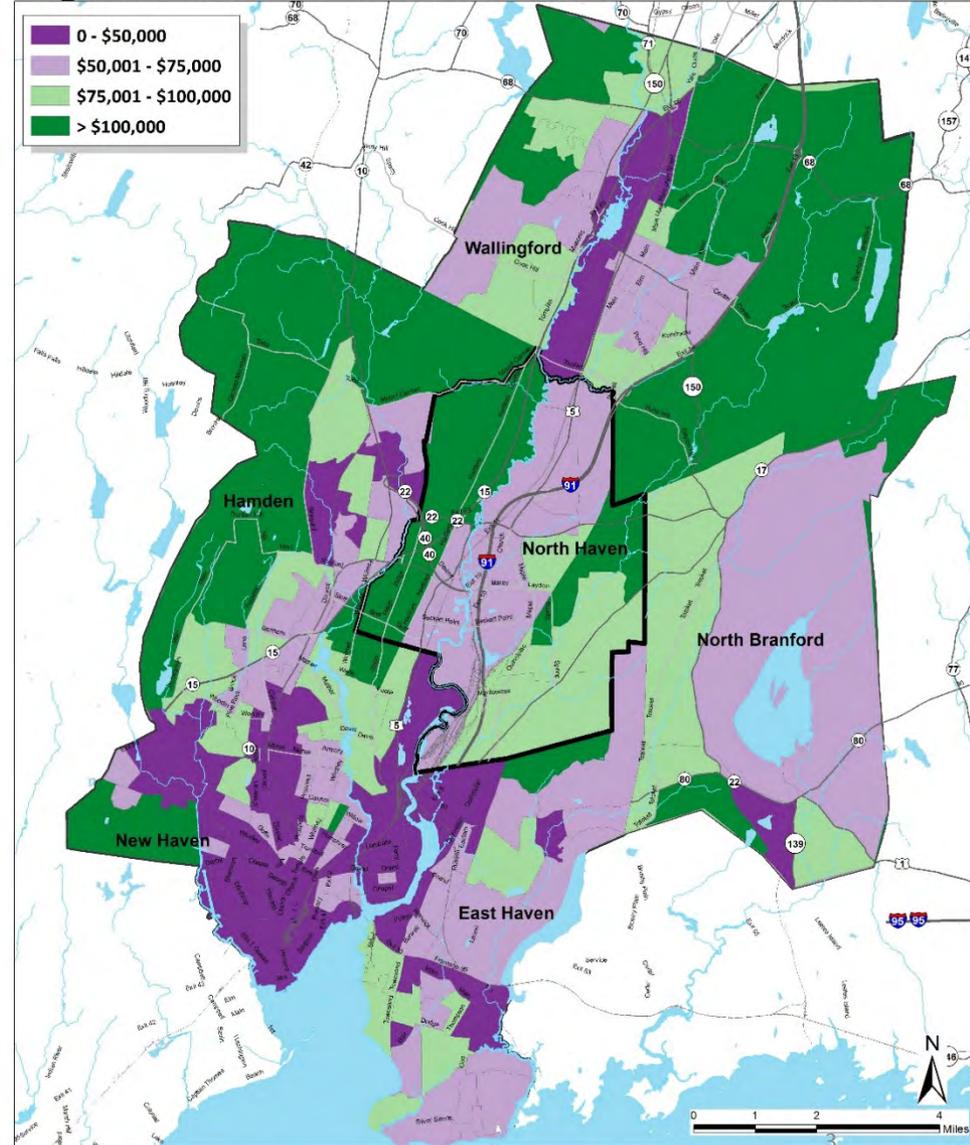
➤ Median income for North Haven was \$86,250 in 2013

Median Household Income in North Haven and Surrounding Communities, 2013



Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey.

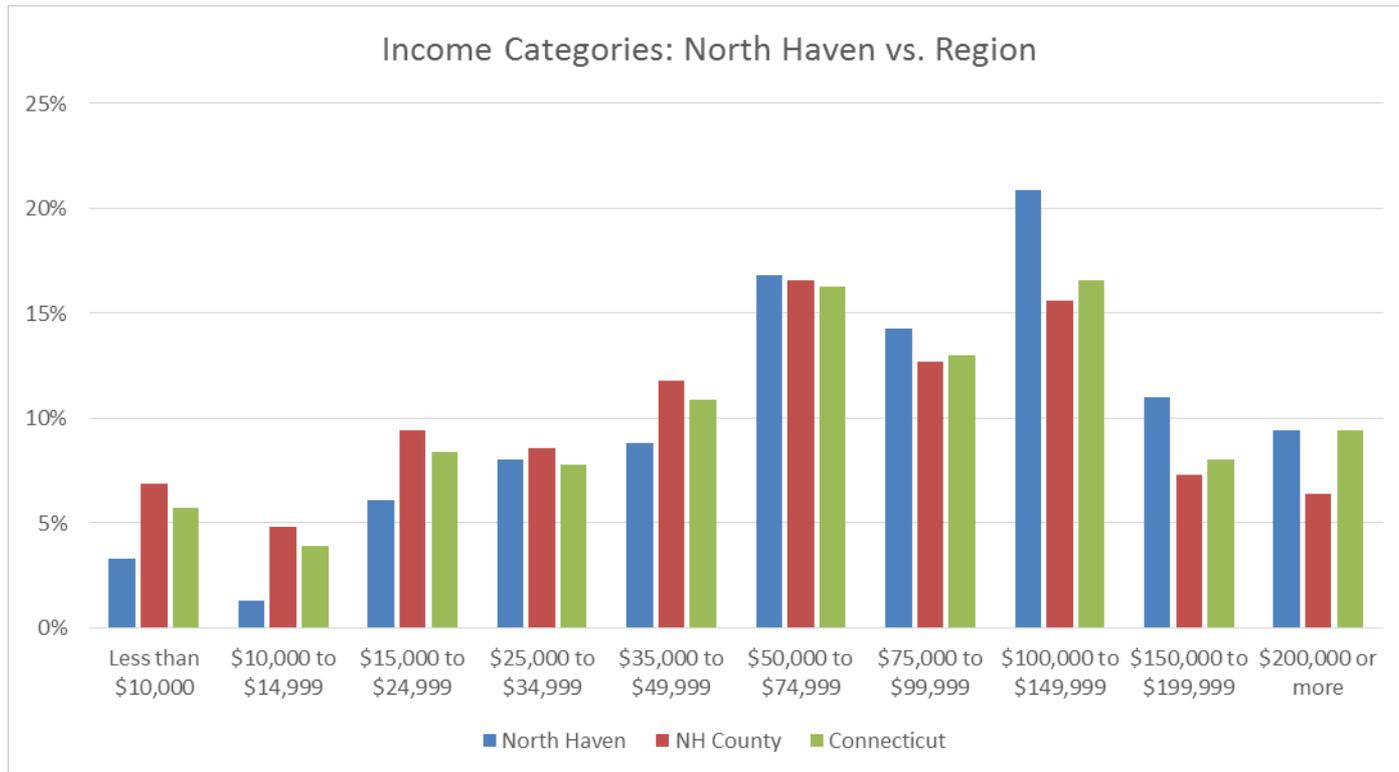
Regional Median Income by Block Groups in 2009-2013 *North Haven POCD*





Income

- Income distribution skews towards upper-middle class incomes compared to New Haven County and Connecticut as a whole
 - A third of residents fall between \$50,000 to \$99,999/year
 - Another third are in the \$100,000 to \$199,999 range

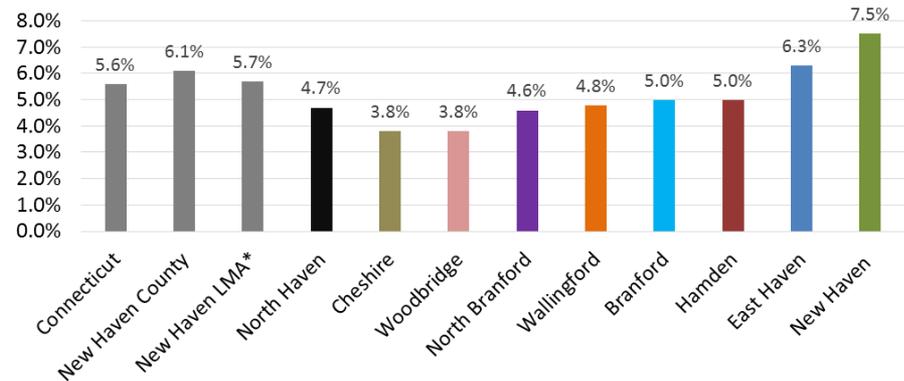




Jobs and Unemployment

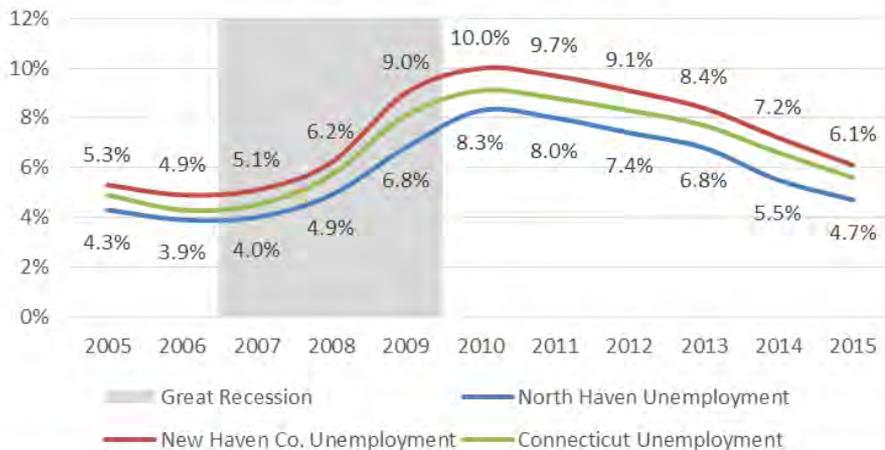
- The average annual unemployment rate for 2015 was 4.7% (lower than region and many neighbors)
- Unemployment has steadily fallen and remained below state and regional averages since 2010
 - Currently comparable to 2008 levels—not yet back to pre-Recession levels

Unemployment Rate in 2015 Annual Average North Haven and Surrounding Communities



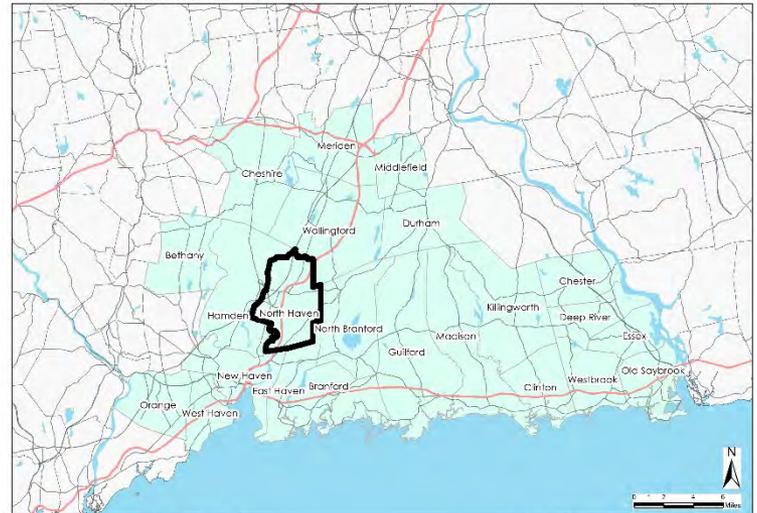
Source: Connecticut Department of Labor, Office of Research, 04/2016.

Unemployment Trends, 2005 - 2015



New Haven Labor Market Area

North Haven POCD



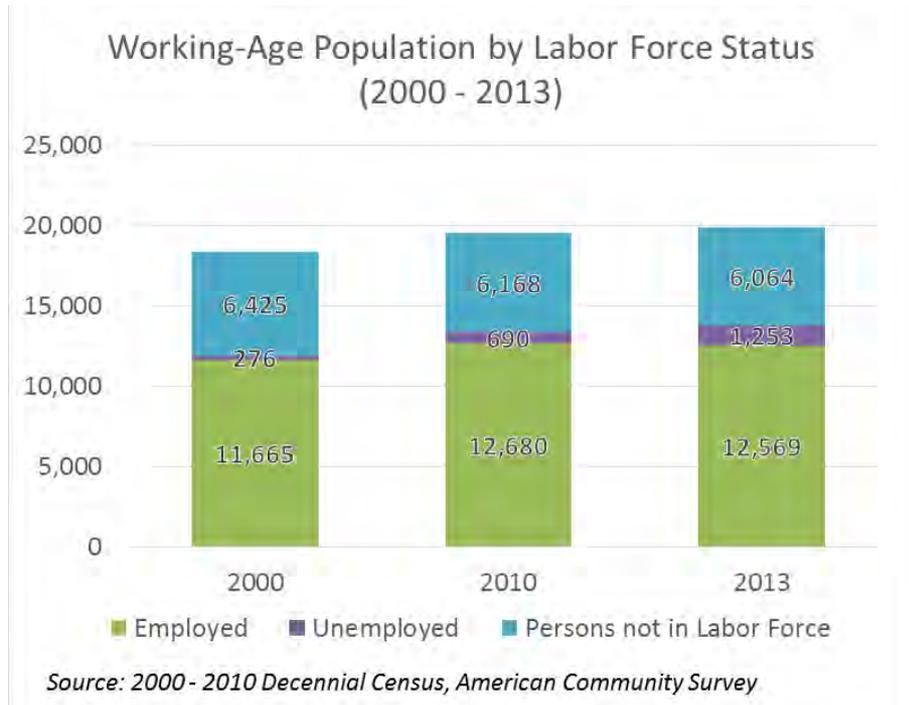
MILONE & MACBROOM® 100 North Haven, CT 06455
The map is made for display purposes only and is not to scale.

ABOUT THIS MAP: Source: Milone & MacBroom DEEP (2011) 2010 Census (ACS) 1. Factors: Level of North Haven (2015)



Labor Force Status

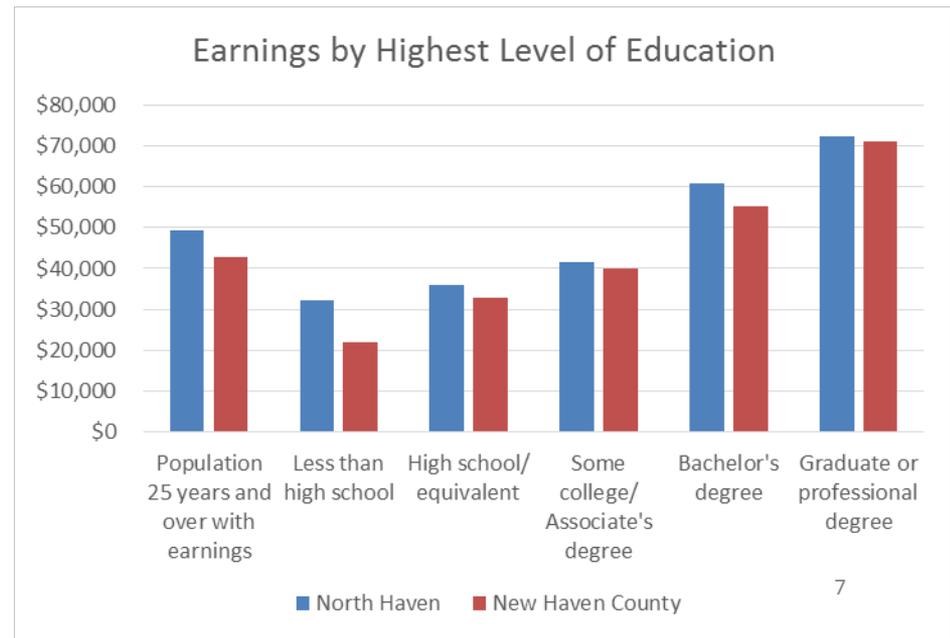
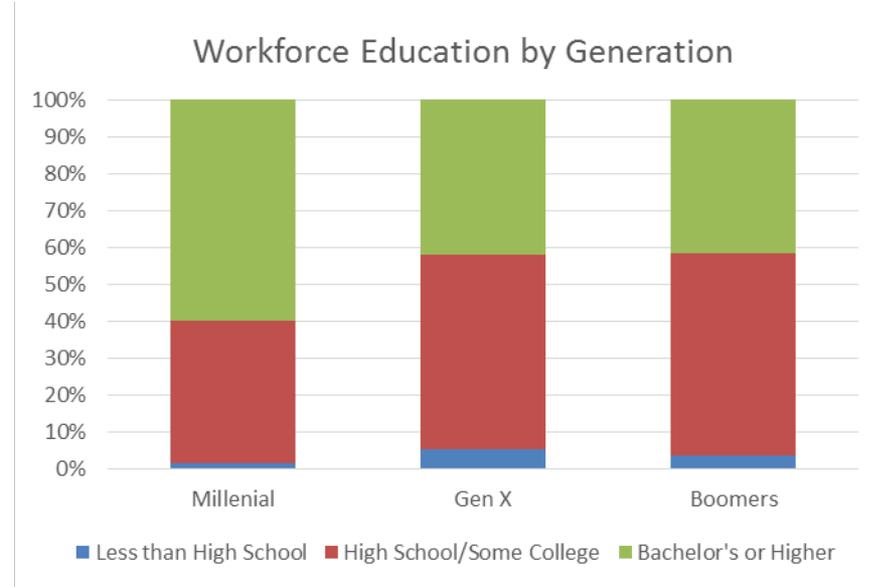
- Census measures of labor force participation show increase in residents either working or seeking work (up from 65% to 69.5% from 2000 to 2013)
 - Trend occurring despite aging population and increase in retirement-age adults





Labor Force Education

- Compared to New Haven County as a whole, better educated (40% with BA or higher vs. 33%)
 - Younger adults much more likely (60%) to have BA or higher
- Controlling for education, North Haven residents earn more than regional average
 - For example, workers with a Bachelor's earn ~\$5,000/year more than New Haven Co. average



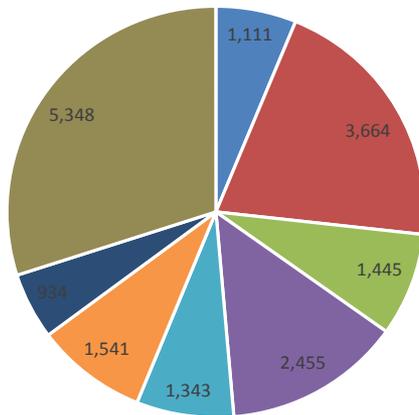


Jobs and Industry Clusters

- Manufacturing, retailing account for biggest shares of local jobs
- Location quotients reflect relative concentration of jobs in North Haven vs. New Haven County
 - Shows high concentration of industrial, logistics, and construction sector jobs

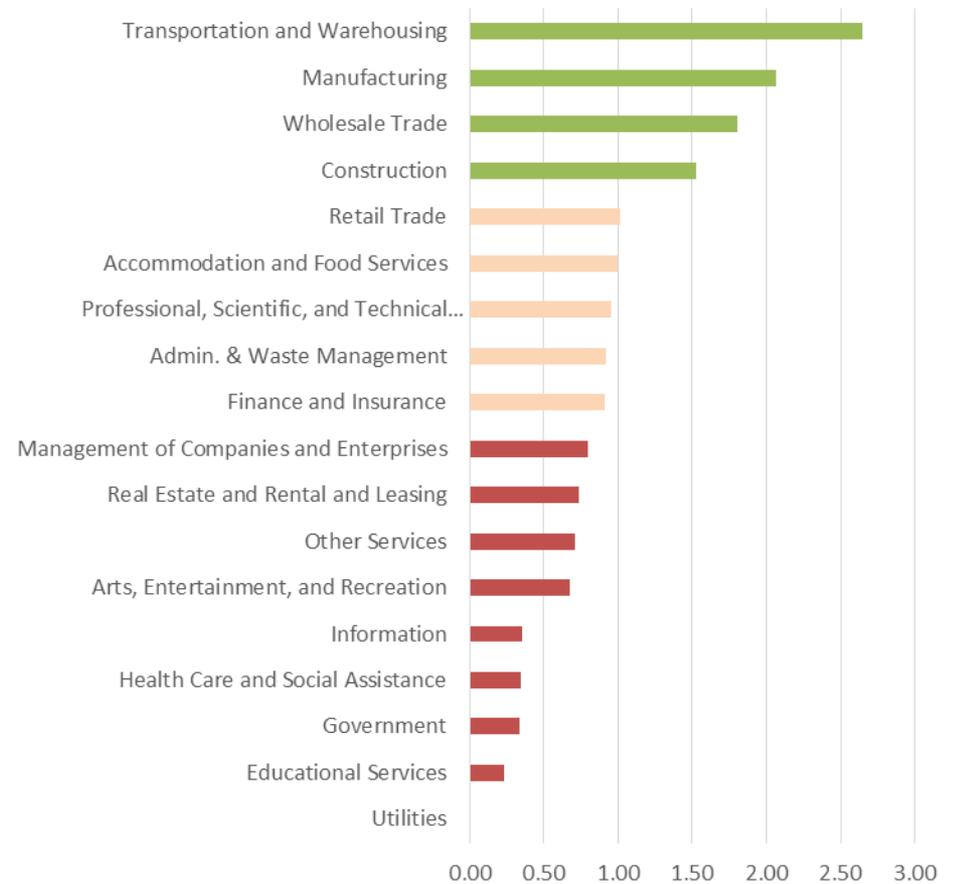
North Haven Employment Industries by Number of Jobs, 2014

- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Health Care & Social Assistance
- Accommodation and Food Service
- Total Government
- Other



Source: CERC Town Profile, 2016.

Location Quotients by Sector





Major Employers

- Major employers listed in Annual Financial Reports indicates significant hiring at large employers, including ~600 jobs at Covidien

MAJOR EMPLOYERS - Unaudited

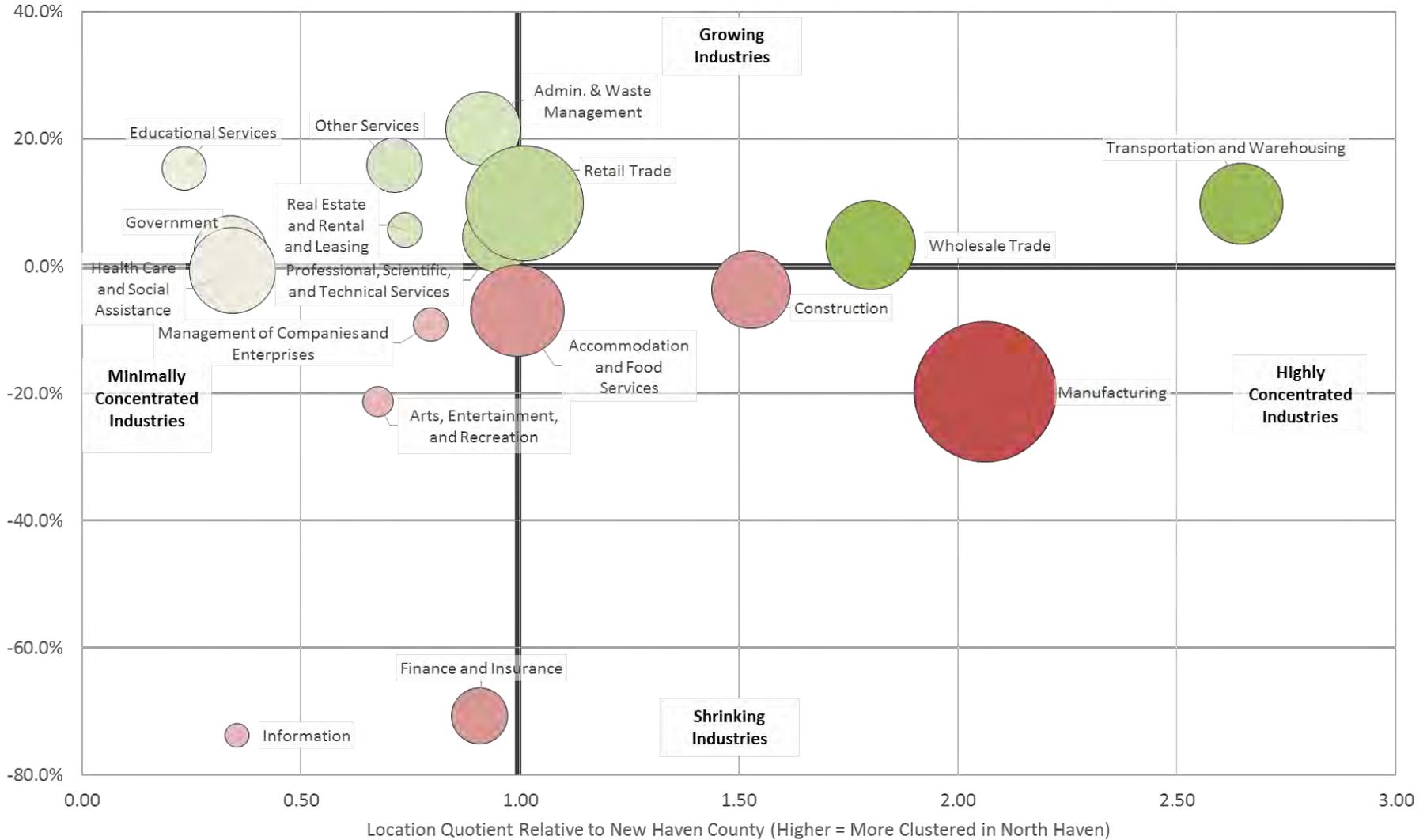
Employer	Type of Business	2015		2005*	
		Employees	Percentage of Total Town Employment*	Employees	Percentage of Total of Town Employment
Covidien	Wound Closer Devices	2128	*	1,985	*
Town of North Haven	Municipality	671	*	621	*
Brescome Barton	Liquor Distributor	341	*	-	*
Area Cooperative Education Services	Educational	317	*	307	*
HB Communications	Sale/Service Audio Visual and Video Eqmt	220	*	154	*
New Breed Logistics	Freight Traffic Managers	178	*	-	*
Mossberg, OF & Sons	Firearms	215	*	145	*
Connecticut Container Corporation	Corrugated Shipping Containers and Displays	109	*	133	*
Quinnipiac University	Education	440	*	-	*
United Aluminum	Manufacturer	160	*	-	*

(* Data Not Available)



Industry Clusters

Industry Clusters in North Haven by Size, Concentration, and Growth (2009 - 2014)





Employment Trends

- Construction/ manufacturing jobs declined since 2009
- Service jobs down overall, but some growth areas
 - Information/ Finance & Insurance saw largest declines
 - Administration/ Waste Mgmt., Educational Services and Other Services increased most
- Both goods producing and services sector job trends below state and regional averages

North Haven Employment Trends Comparison: 2009-2014 Employment Estimates

	Town of North Haven				New Haven County		CT	
	Count	Change	% Change	Change	% Change	Change	% Change	
	2009	2014	2009-2014	2009-2014	2009-2014	2009-2014	2009-2014	
Total Non-Farm Employment	19,975	17,826	-2,148	-10.8%	11,519	3.9%	37,183	2.3%
Goods Producing	5,719	4,776	-943	-16.5%	-4,180	-8.8%	-10,351	-4.6%
Mining	*	*					-80	-12.7%
Construction	1,153	1,111	-42	-3.6%	236	1.9%	1,329	2.4%
Manufacturing	4,566	3,665	-901	-19.7%	-4,416	-12.5%	-11,600	-6.8%
Service Producing	13,342	12,115	-1,226	-9.2%	15,699	6.3%	47,534	3.4%
Utilities	78	*			411	34.5%	-701	-10.6%
Wholesale Trade	1,399	1,446	47	3.4%	-568	-3.9%	-1,907	-2.9%
Retail Trade	2,234	2,456	222	9.9%	1,357	3.3%	6,409	3.6%
Transportation and Warehousing	1,119	1,229	110	9.8%	816	11.2%	2,963	7.6%
Information	397	104	-293	-73.8%	-3,254	-38.9%	-3,009	-8.6%
Finance and Insurance	1,973	578	-1,395	-70.7%	-360	-3.1%	-10,759	-9.1%
Real Estate and Rental and Leasing	208	220	12	5.7%	538	11.6%	75	0.4%
Professional, Scientific, and Technical Services	869	910	40	4.6%	726	4.6%	8,203	9.4%
Management of Companies and Enterprises	236	215	-22	-9.2%	1,491	46.6%	4,244	15.4%
Admin. & Waste Management	823	1,002	178	21.7%	4,149	27.9%	10,045	13.3%
Educational Services	304	350	47	15.3%	2,496	10.6%	5,048	9.7%
Health Care and Social Assistance	1,353	1,344	-9	-0.7%	3,977	6.2%	17,272	7.1%
Arts, Entertainment, and Recreation	213	167	-45	-21.3%	496	13.0%	2,761	11.7%
Accommodation and Food Services	1,657	1,542	-115	-7.0%	2,682	11.0%	13,861	12.6%
Other Services (except Public Administration)	477	553	76	15.9%	742	5.8%	3,611	6.4%
Total Government	914	935	21	2.3%	-1,858	-3.7%	-10,582	-4.3%
Farm Employment	*	*	*	*	75	10.0%	555	12.0%

Source: CT Department of Labor, QCEW Program Data, 2009-2014



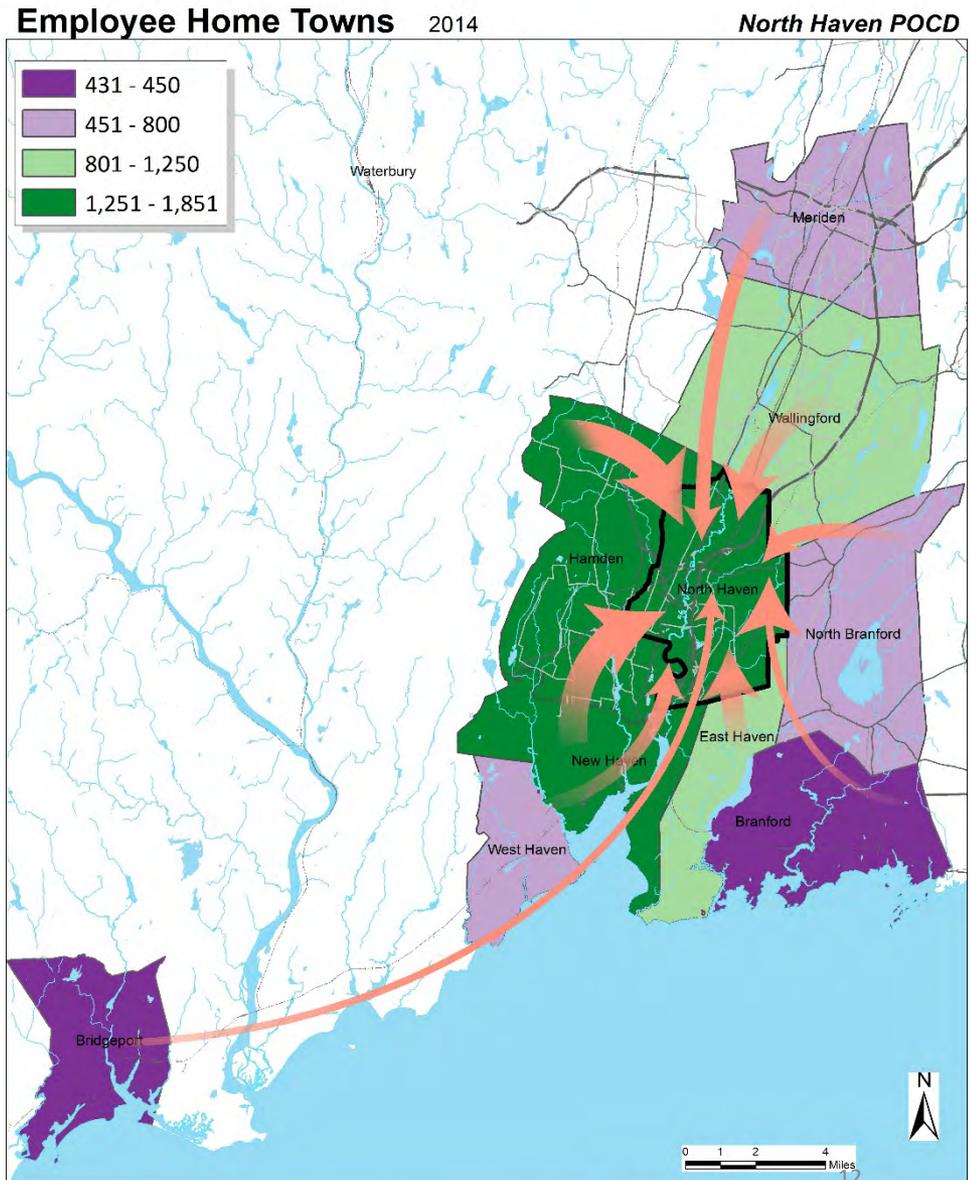
Journey to Work: Labor Force

Town of North Haven Employee Home Towns, 2014

New Haven	1,851	10.1%
North Haven	1,793	9.7%
Hamden	1,258	6.8%
Wallingford	1,157	6.3%
East Haven	824	4.5%
West Haven	795	4.3%
Meriden	733	4.0%
North Branford	451	2.4%
Branford	448	2.4%
Bridgeport	431	2.3%
All Other Locations	8,676	47.1%
Total	18,417	100.0%

Source: onthemap.ces.census.gov, 04/2016

➤ About half of workers employed in North Haven live in town or in adjacent communities





Journey to Work: Residents

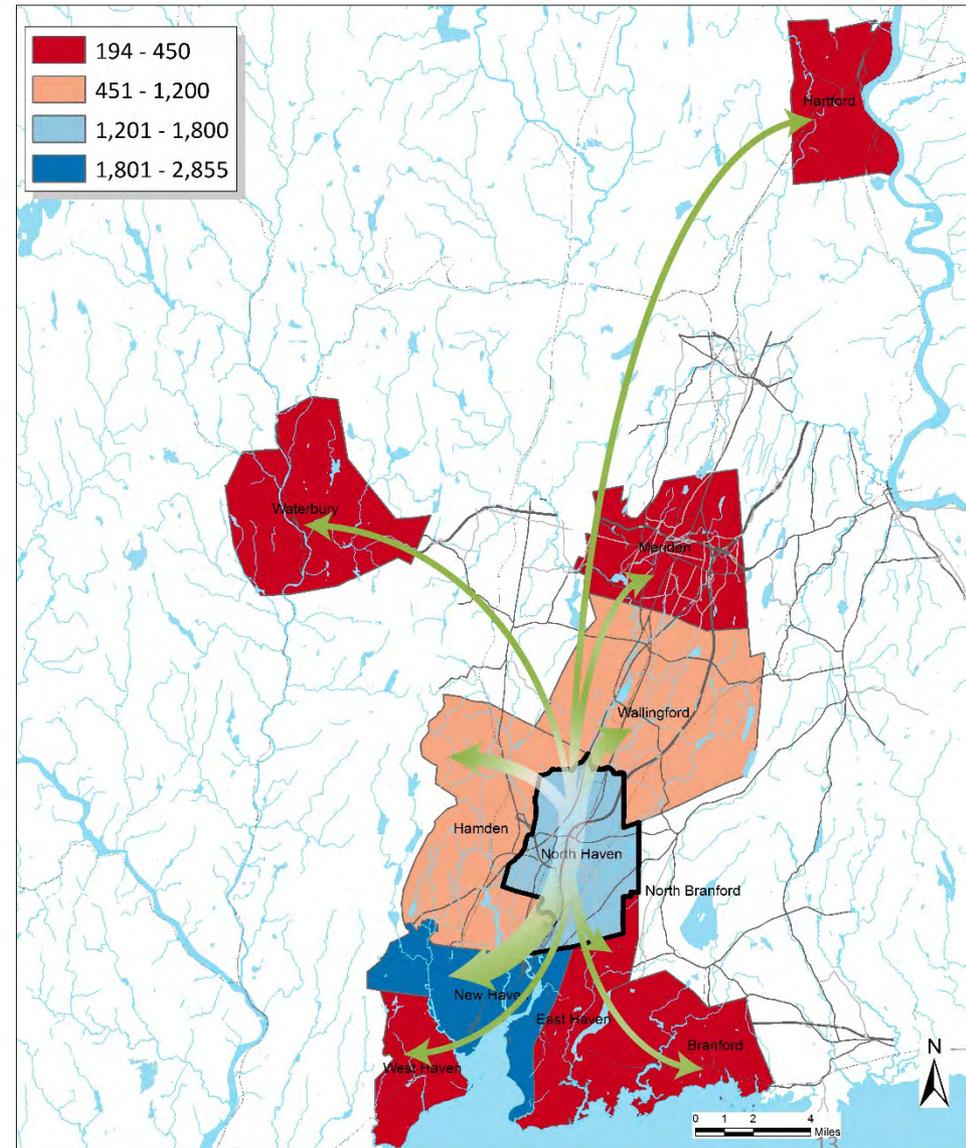
Town of North Haven Laborforce Work Destinations, 2014

New Haven	2,855	22.9%
North Haven	1,793	14.4%
Hamden	1,119	9.0%
Wallingford	668	5.4%
Hartford	437	3.5%
Branford	337	2.7%
West Haven	253	2.0%
Meriden	232	1.9%
East Haven	221	1.8%
Waterbury	194	1.6%
All Other Locations	4,372	35.0%
Total	12,481	100.0%

Source: onthemap.ces.census.gov, 04/2016

- 14% of employed residents live **and** work in North Haven
- About 45% work in adjacent towns (especially New Haven and Hamden)

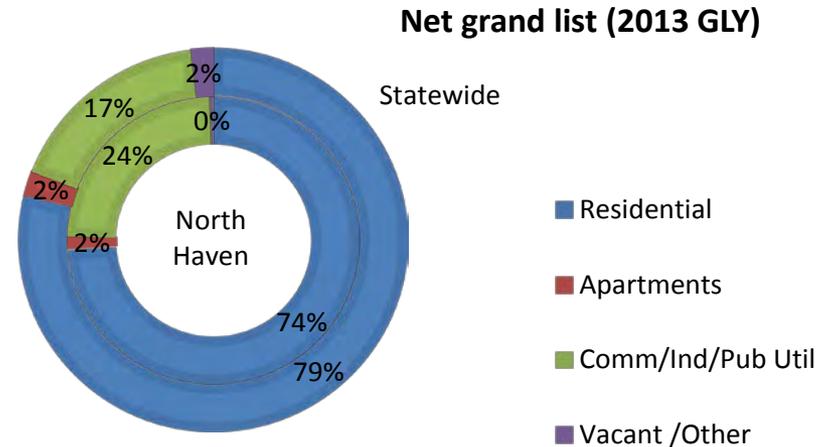
North Haven Labor Force Work Destinations 2014 North Haven POCD



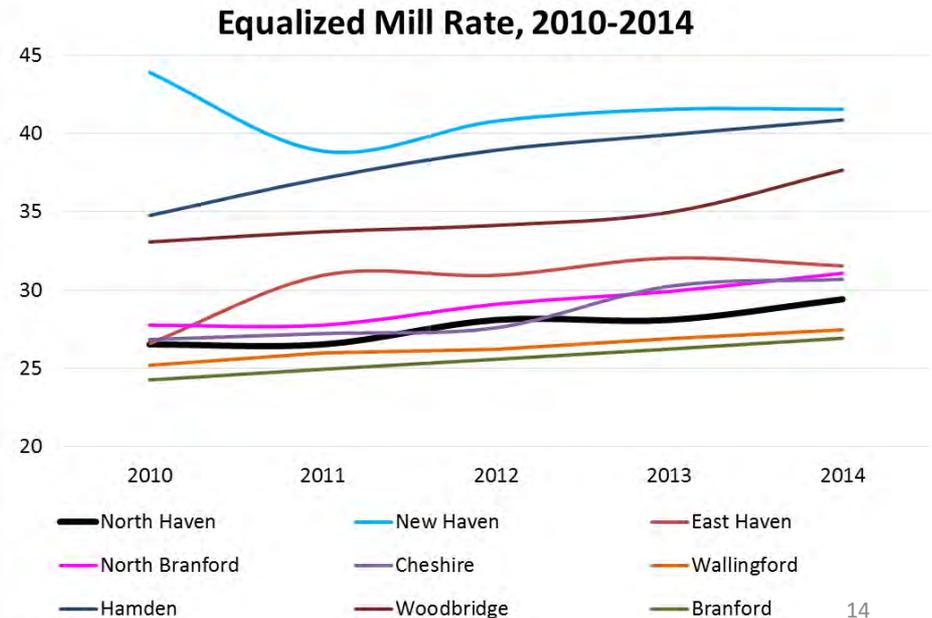


Fiscal Trends

- Moody's bond rating: Aa1 (12/14)
- Debt per capita: \$2,118 (FY 12-13)
- Average across state: \$2,276
- Median across state: \$1,610
- Mill rate of 29.42 remains below rates of most neighboring communities



Source: CT OPM, 2010-2014.

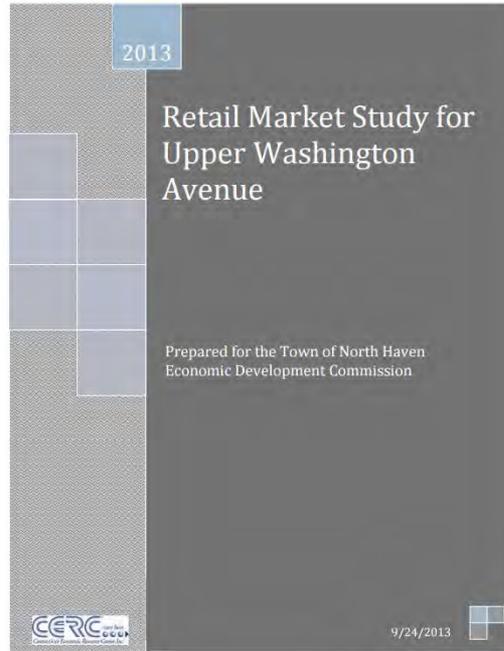


Source: CT OPM, 2010-2014.

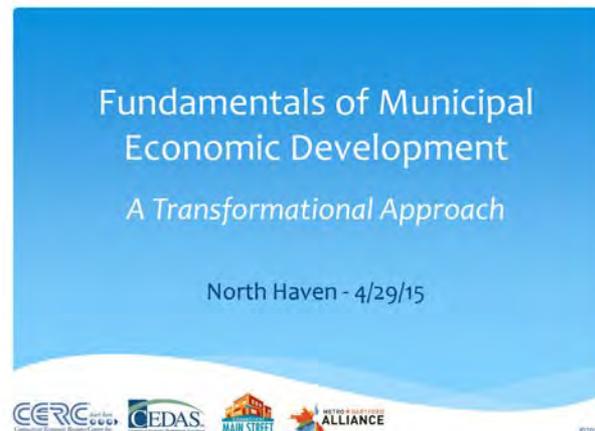


Current & Ongoing Initiatives

- Ongoing events, outreach, studies, and other efforts from the North Haven Economic Development Commission
- Includes property listing of commercial properties seeking tenants and buyers



Location, Location, Location !
 North Haven is centrally located between New York, Boston and Providence. With easy access to Interstate 91, 95 and the Merritt Parkway we are ideally located for business, and pleasure.





Current & Ongoing Initiatives

Northeast Gateway Industrial Park



Final Component to Medical Epi-Center



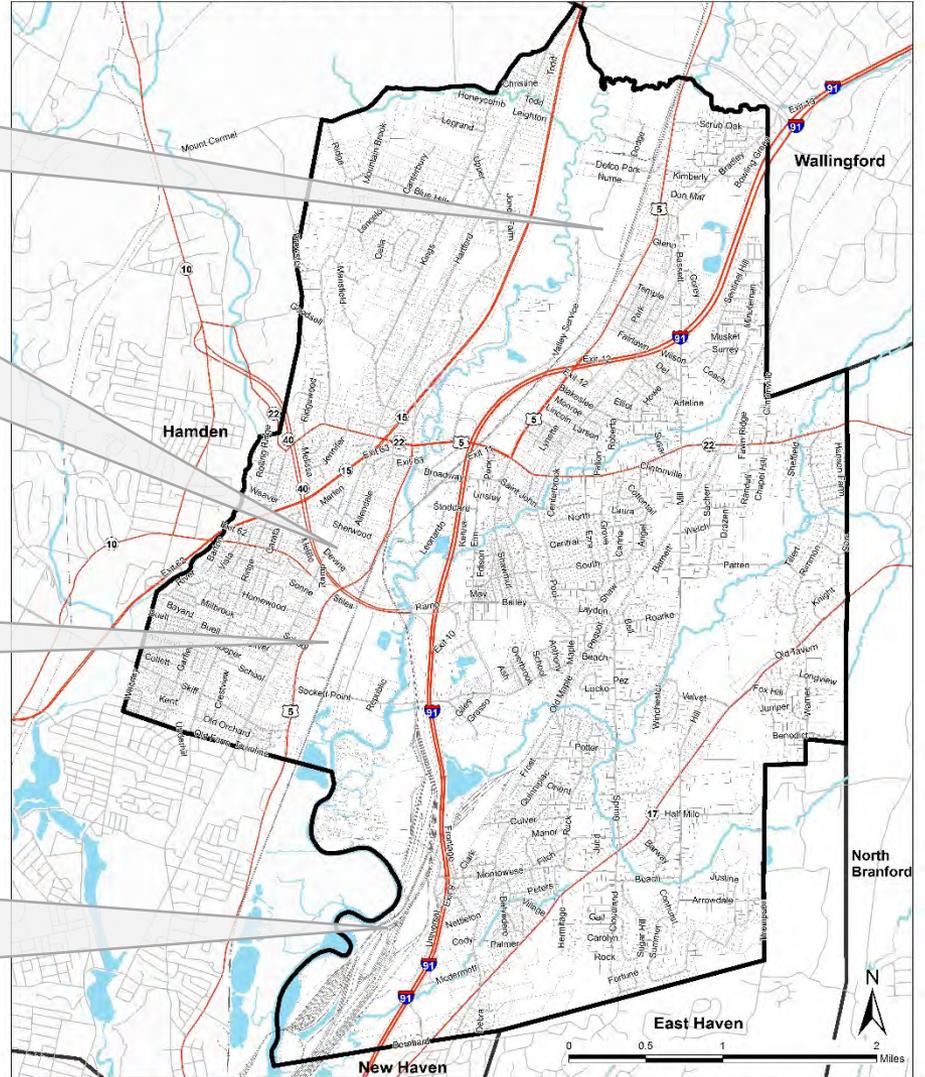
State Street Medical Center



CEAR HILLS INFRASTRUCTURE IMPROVEMENT DISTRICT

Economic Development Initiatives

North Haven POCD



MILONE & MACBROOM For North Haven, CT | 2015
This map is intended for viewing purposes only. Details may not be exact.

About this map: Boundaries, Hydrography, State Parks: DEP | 2011 | Streets: ESRI | 2011 | Parcels: Town of North Haven | 2012



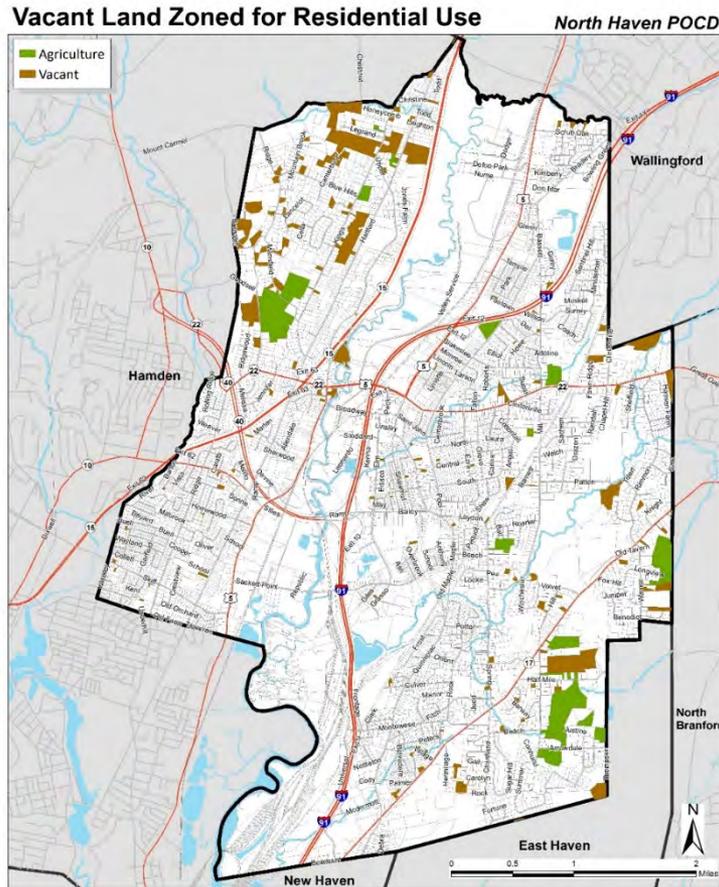
Discussion Questions

- What do employment and workforce trends indicate in terms of:
 - Successes/setbacks in the Town's strategy?
 - Sectors and populations to focus on attracting and retaining going forward?
- What is the Town doing right in terms of fostering a positive climate for business?
- What steps are necessary to maintain strong fiscal position?
- What are the most important economic development opportunities to move on in the coming decade?



Buildout Analysis

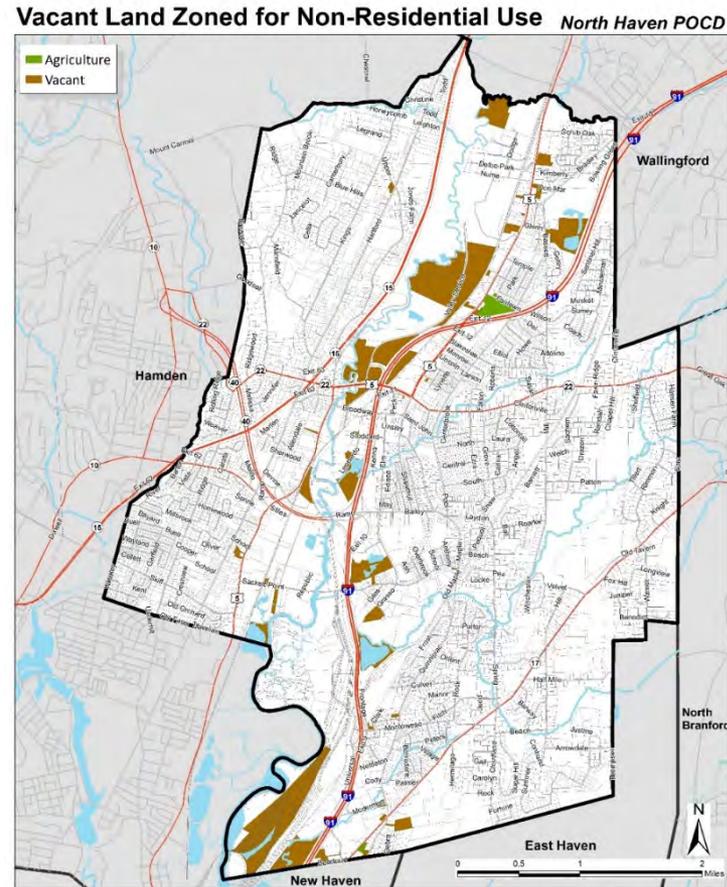
- Scenario: what if all buildable vacant land was developed to the maximum extent allowed under zoning?



MILONE & MACBROOM For North Haven, CT | 2015

About this map: Boundaries: Municipality; Style: POCD (2011) Streets: ESF (2011) Parcel: Town of North Haven (2013)

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MILONE & MACBROOM For North Haven, CT | 2015

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Buildout Analysis: Land Classification

- Fully utilized (no additional room to build, excluded from analysis)
- Underutilized (one or a few existing homes, but with substantial unbuilt acreage)
- Vacant (unbuilt parcel with space for one or several units)





Buildout Analysis: Residential

Potential Residential Development

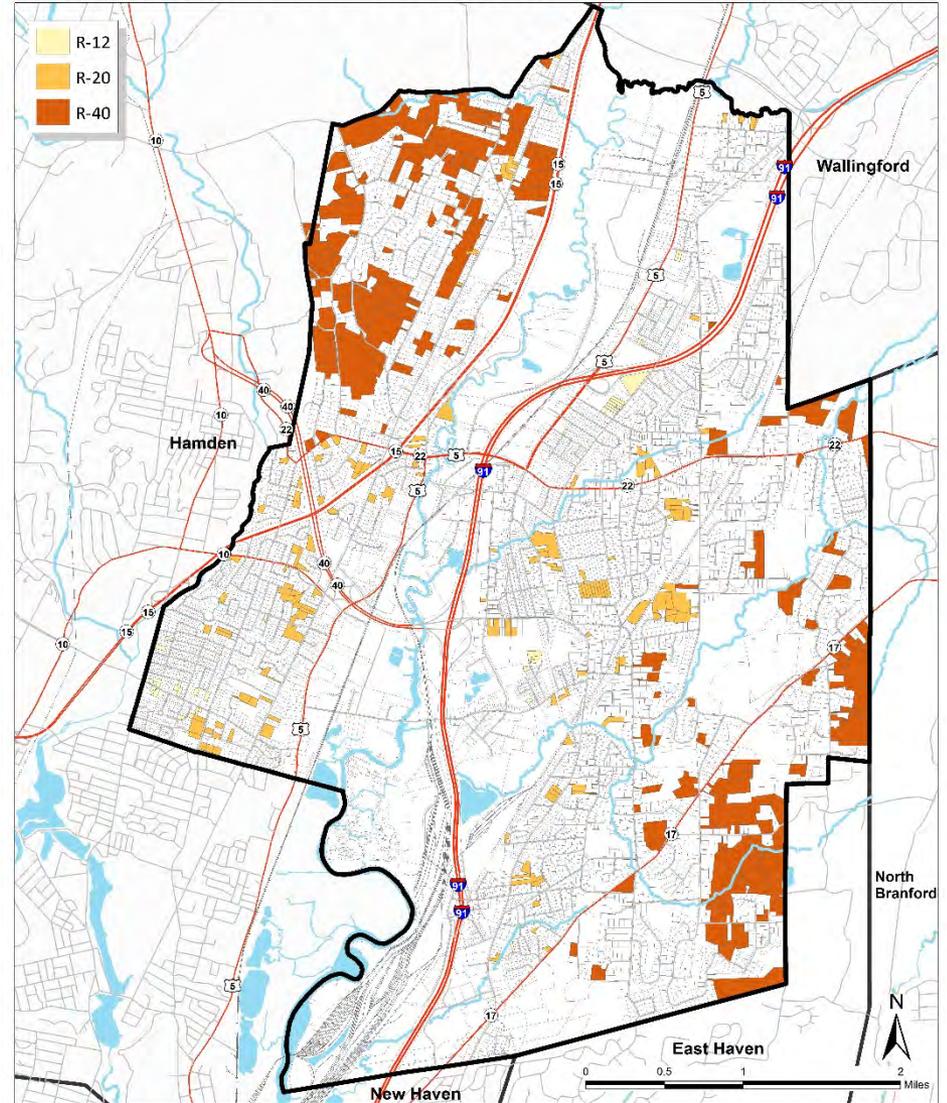
Zone	Gross Vacant & Agricultural Land (Acres)	Net Buildable Land (Acres)	Estimated Potential Single Family Units
R-12	14.1	14.1	39
R-20	33.7	25.7	43
R-40	526.5	367.4	306
Subtotal	574.3	407.2	388

Underutilized Parcels

Zone	-	Underutilized Land (Acres)	Estimated Potential Single Family Units
R-12	-	11.6	32
R-20	-	125.5	202
R-40	-	332.6	268
Subtotal	-	469.7	502
Total			890

Source: Town Assessors Database (2015), MMI analysis

Potential Residential Development



MILONE & MACBROOM

For North Haven, CT | 2015

About this map: Boundaries: Hydrography: State Plans: CEEP (2011)
Streets: ESRI (2011) | Parcels: Town of North Haven (2015)

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Buildout Analysis: Non-Residential

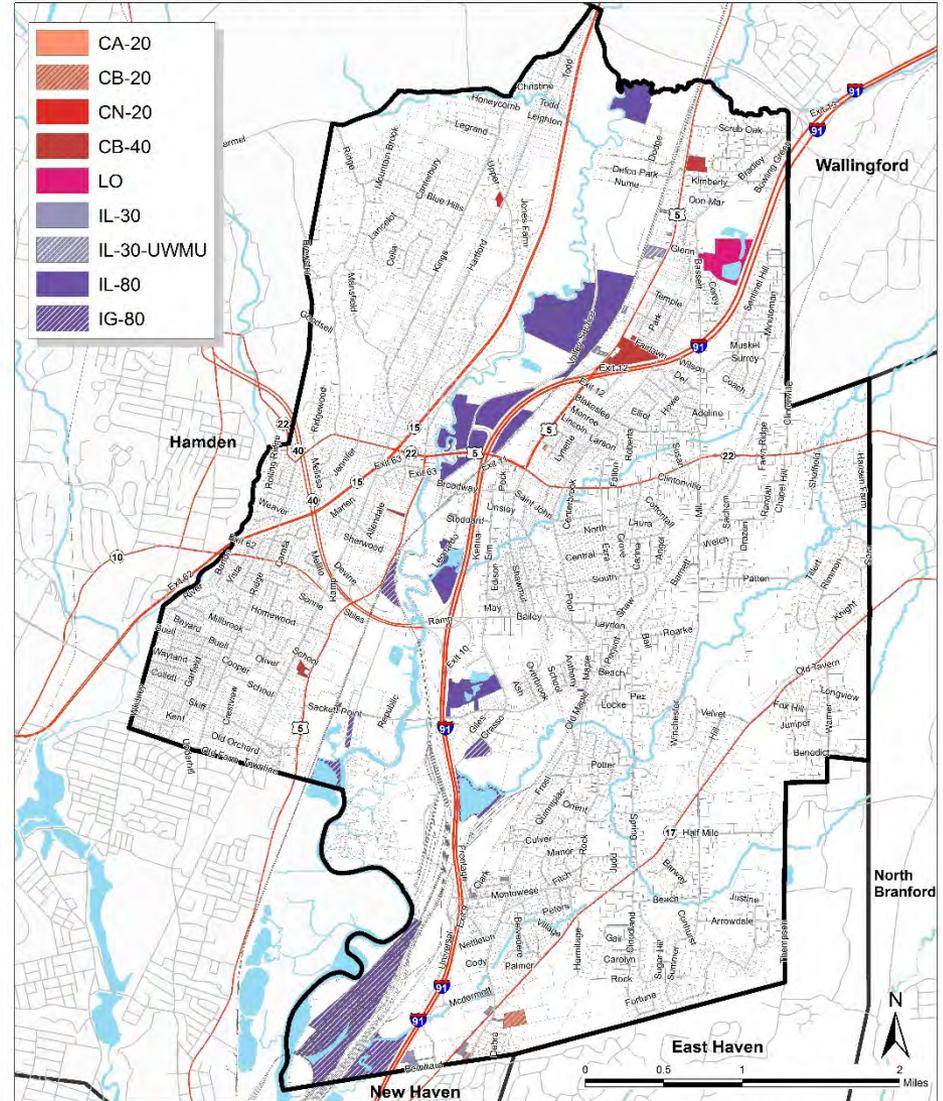
Potential Non-Residential Development

Zone	Gross Vacant Land (Acres)	Net Buildable Land (Acres)	Potential Development (Square Feet)
CA-20	0.2	0.2	0
CB-20	11.0	7.3	42,200
CB-40	32.2	32.2	241,900
CN-20	1.9	0.7	0
IG-80	252.8	115.7	1,299,900
IL-30	14.7	14.7	337,800
IL-30-UWMU	9.1	9.1	88,200
IL-80	306.1	104.6	904,300
LO	40.2	40.2	569,400
Subtotal	668.1	324.7	3,514,300

Source: Town Assessors Database 2015, prepared by MMI.

- Development potential based on *average attained* floor area ratio
- Actual projects tend to be approved with smaller square footage than the theoretical maximum allowed by zoning

Undeveloped Non-Residential



MILONE & MACBROOM For North Haven, CT | 2015

About this map: Boundaries, Hydrography, State Parks, DEEP (2011) Streets, EIR (2011), Parcels: Town of North Haven (2015)

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Potential Development (Alternative A)

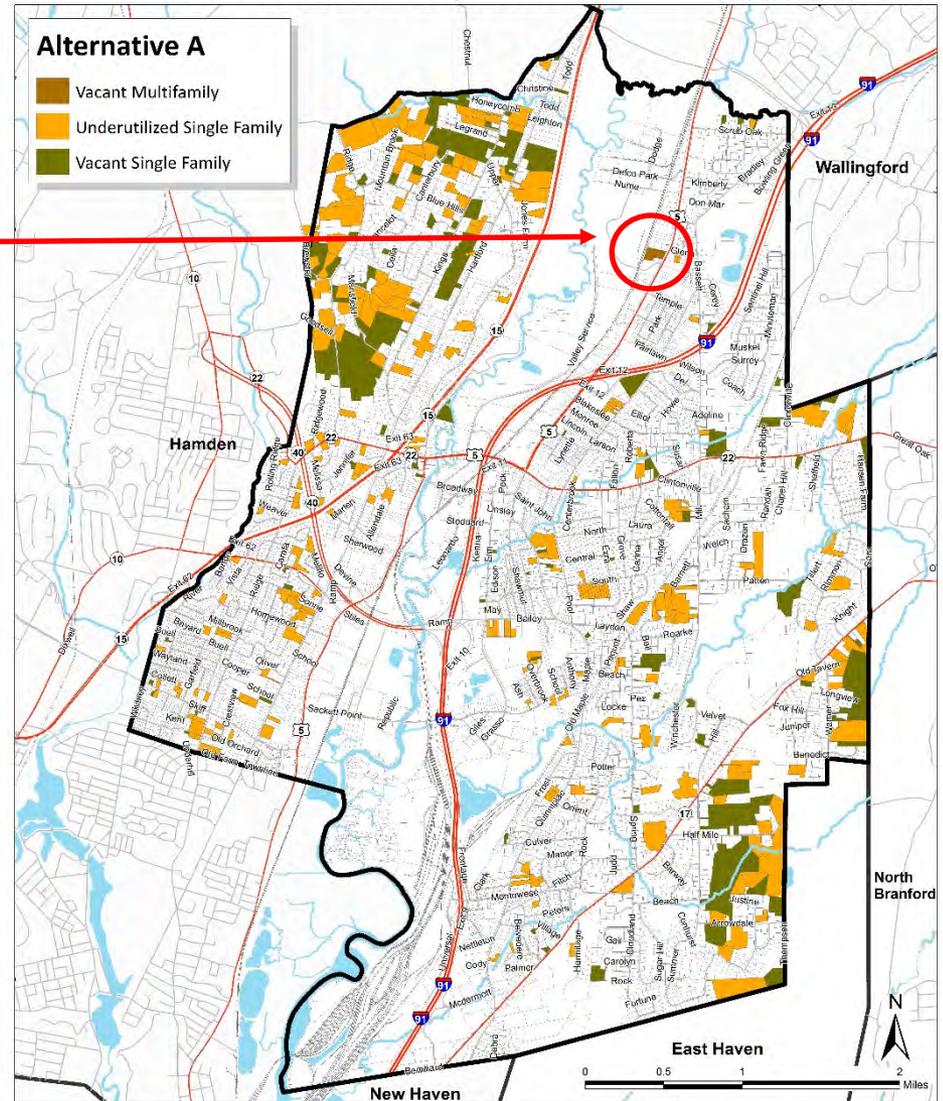
- What-if: multifamily residential development in UWMU overlay zone (displaces commercial development)
- Potential yield of up to 204 units
- Reduces potential non-residential development by approx. 51,000 sf.

Potential Residential Development (Alternative A)

Zone	Vacant: Estimated Potential Single-Family Units	Underutilized: Estimated Potential Single-Family Units	Vacant: Estimated Potential Multi-Family Units
R-12	39	32	0
R-20	43	202	0
R-40	306	268	0
IL-30-UWMU	0	0	204
Subtotal	388	502	204
Total		1,094	

Source: Town Assessors Database (2015), MMI analysis

Potential Residential Development





Focus Areas

- Upper Washington Avenue
- Future Train Station Area (Devine Street)
- Town Center

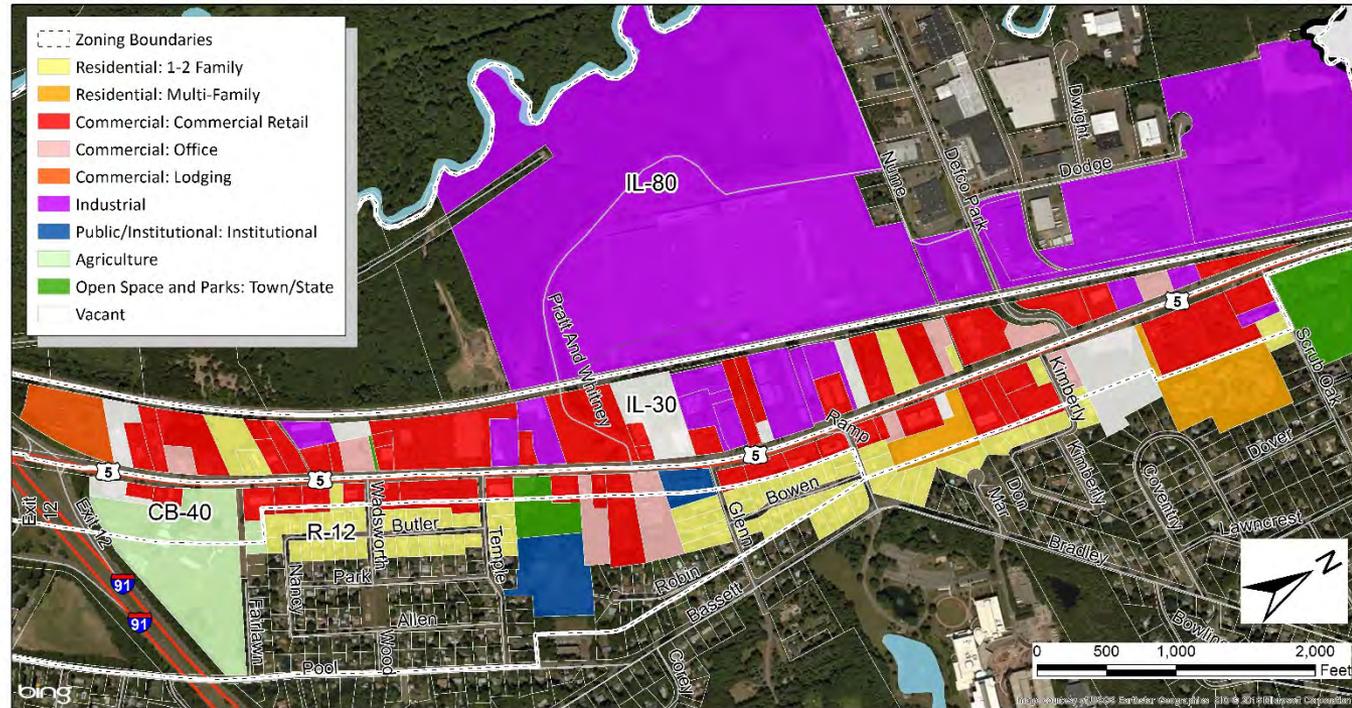


Focus Area: Upper Washington

- Strip-style commercial: restaurants, retail, many auto-oriented businesses
- Some newer multi-family residential on northern end

Upper Washington Land Use

North Haven POCD



For North Haven, CT | 2015

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Streets: ESRI (2011) Parcels: Town of North Haven (2015)

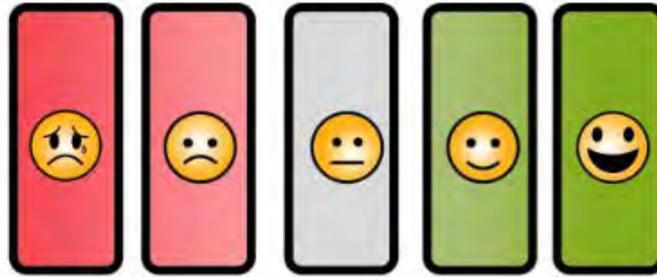


Upper Wash.: Development Examples

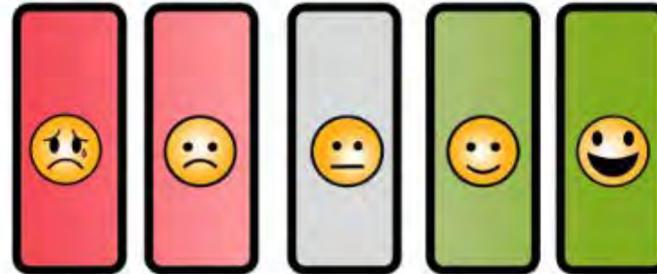
Which of these kinds of redevelopment are appropriate for this area?



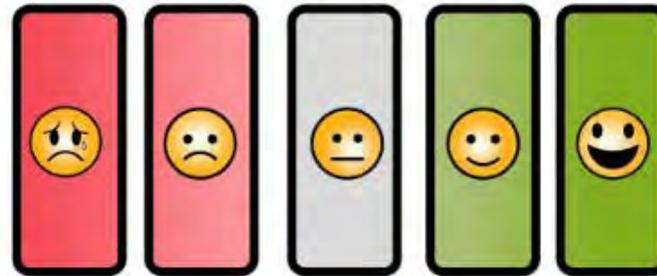
Apartments, Milford



Offices, West Hartford



Apartments, West Hartford



➤ Workshop exercise: do these examples fit your vision for how this area should redevelop?

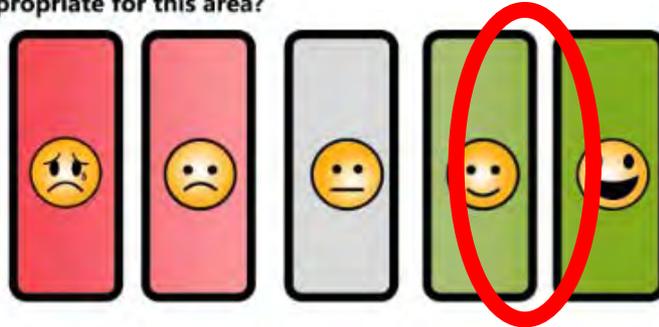


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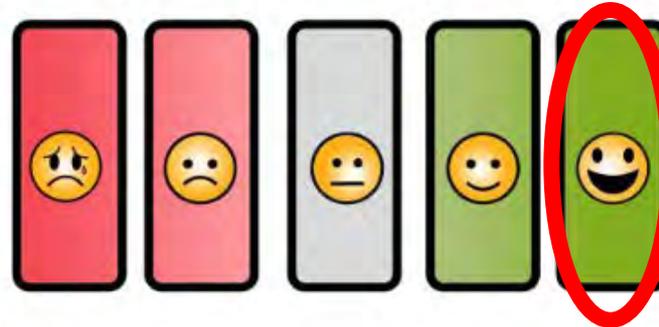
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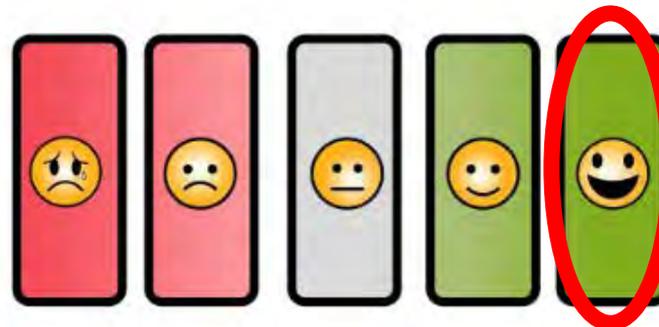
Apartments, Milford



Offices, West Hartford



Apartments, West Hartford



➤ Public responses: very positive towards higher density office and residential forms

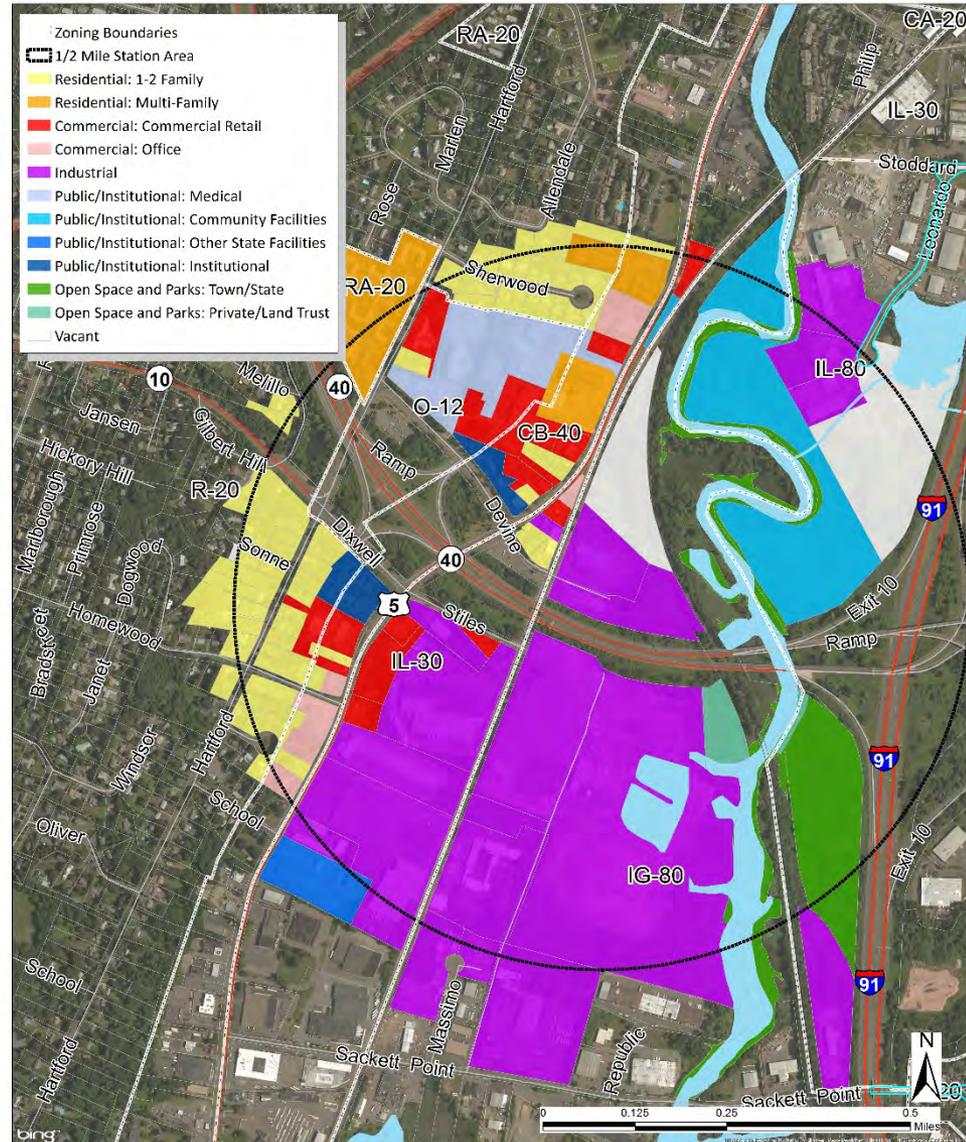


Focus Area: Future Train Station

- Future NHHS rail station site and MEERZ zone
- Developable parcel (9.5 acres) north of station site (but land and access are constrained)
- Existing medical center, housing, and legacy industrial uses

NHHS Station Land Use

North Haven POCD



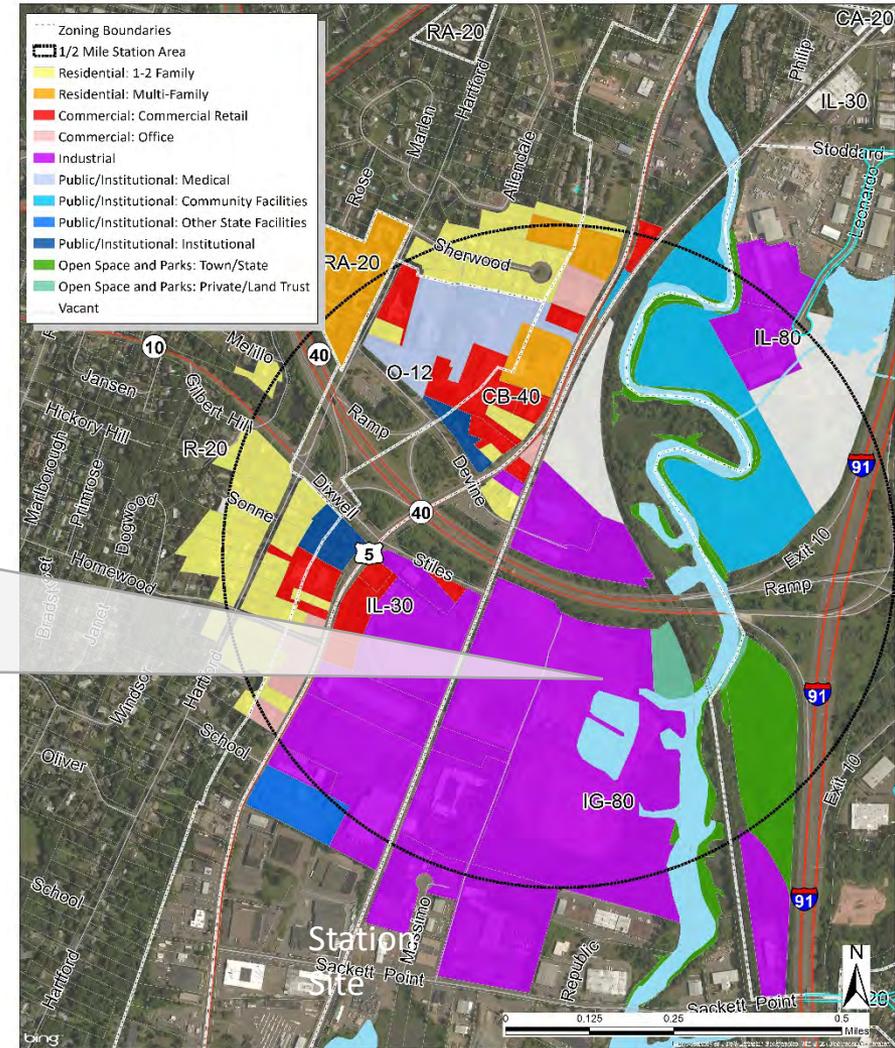


Station Area: Recent Developments

- Pharmacia & Upjohn Site remediation: creating 17 acre development pad and 58 acre ecological preserve



NHHS Station Land Use



North Haven POCD



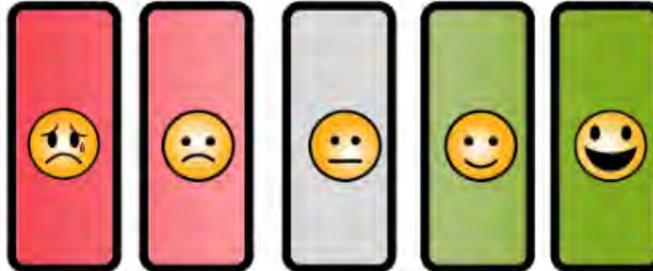


Station Area: Development Examples

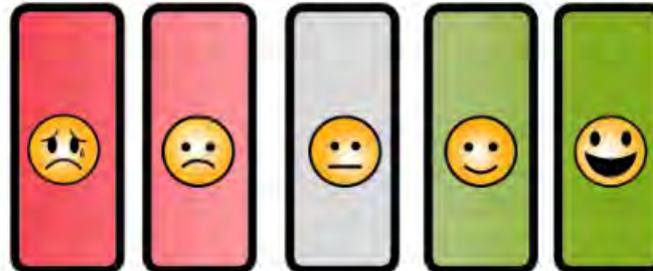
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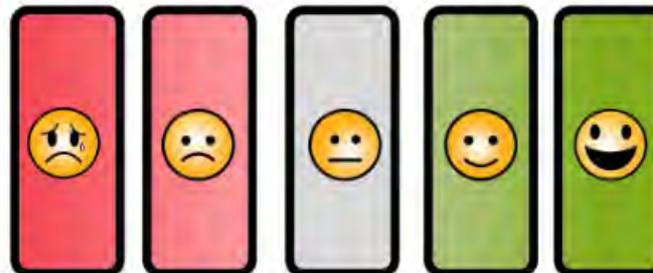
The Exchange, Farmington



UConn Health, Canton



Gateway Medical Office Park, Glastonbury



➤ Workshop exercise: do these examples fit your vision for how this area should redevelop?

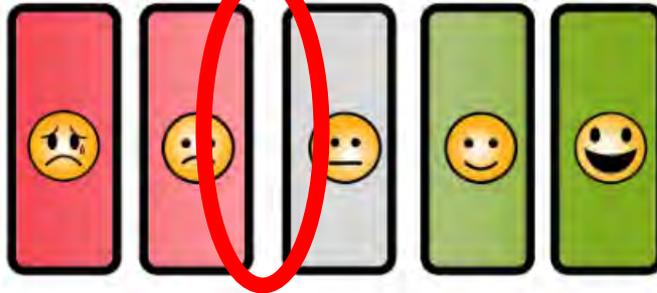


Station Area: Development Examples

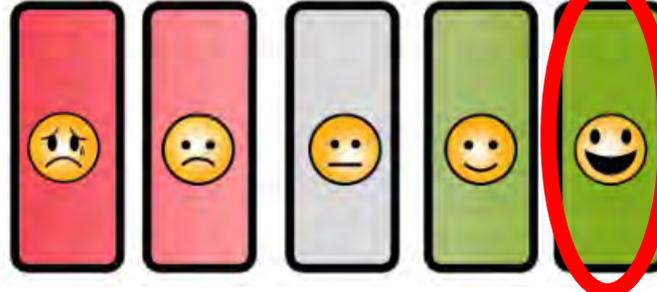
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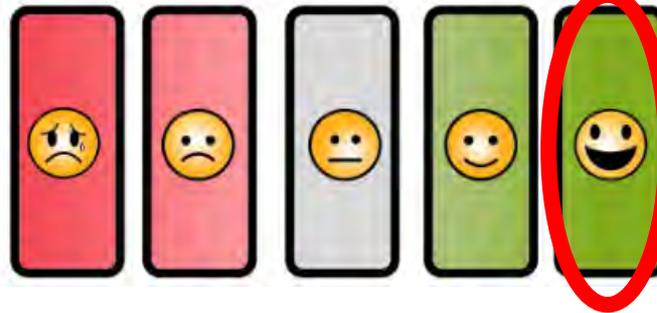
The Exchange, Farmington



UConn Health, Canton



Gateway Medical Office Park, Glastonbury



➤ Public response: mixed/negative on larger-scale mixed use but positive towards more village-style medical campus design

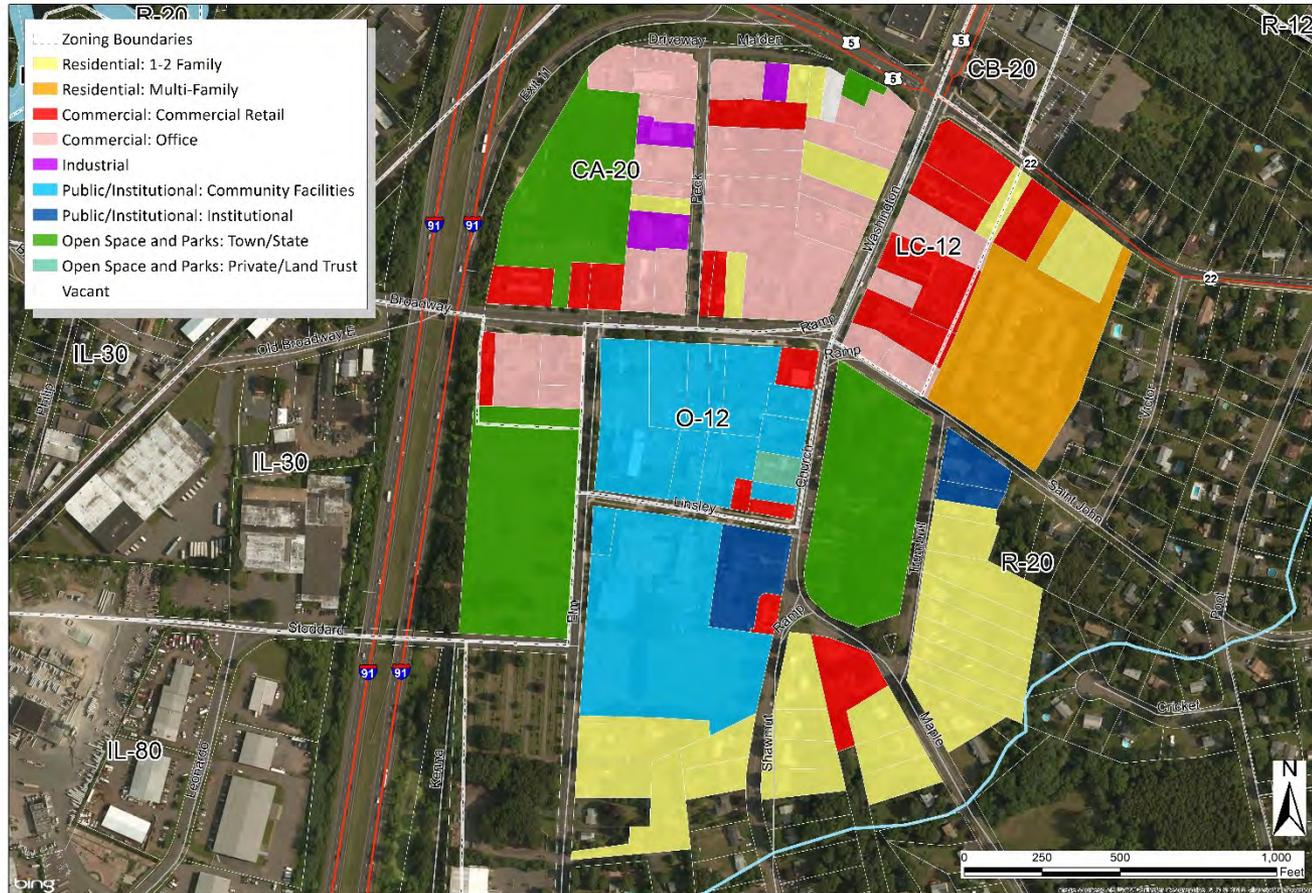


Focus Area: Town Center

- Town Green and municipal facilities
- Small-scale commercial: restaurants and bars, professional services and small offices
- Residential to the south/east

Town Center Land Use

North Haven POCD



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About this map: Boundaries, Hydrography, State Parks: DEEP (2011)
 Streets: ESRI (2011) Parcels: Town of North Haven (2015)

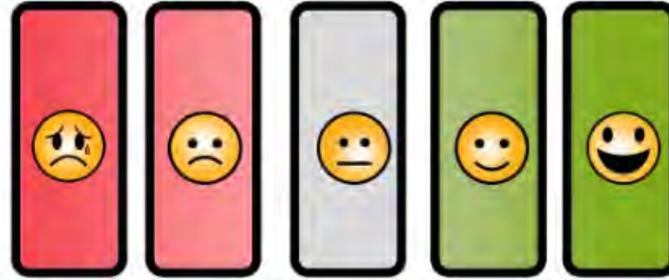


Town Center: Development Examples

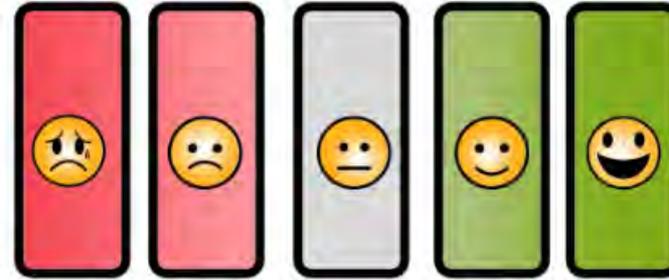
Which of these kinds of redevelopment are appropriate for this area?



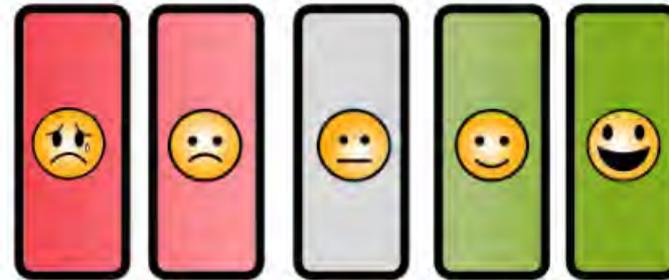
Main ST, Ridgefield



Eric Town Square, Glastonbury



Professional office, Madison



➤ Workshop exercise: do these examples fit your vision for how this area should redevelop?

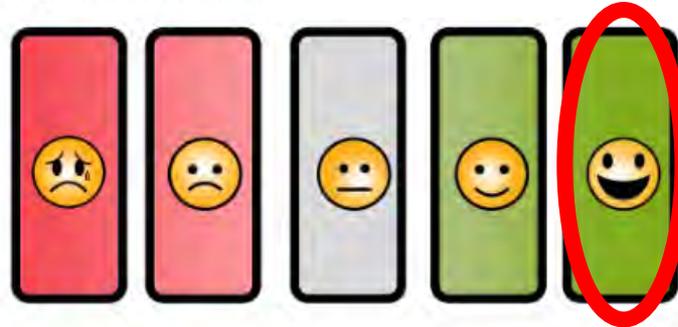


Town Center: Development Examples

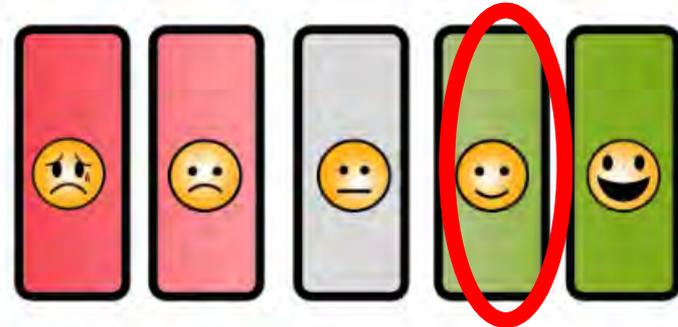
Which of these kinds of redevelopment are appropriate for this area?



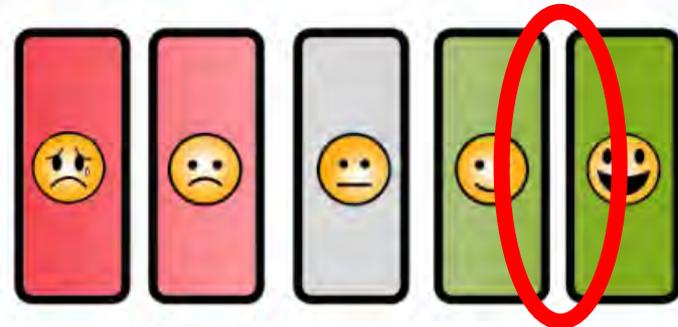
Main ST, Ridgefield



Eric Town Square, Glastonbury



Professional office, Madison



➤ Public responses: most positive on traditional Main Street-style development, positive on more recent developments



Town Center: Development Examples

- Existing commercial: small scale, single use
- CA-20 and O-12 zones: do regs match intent for the type of development desired in this area?
 - Maximum height: 35'
 - Maximum coverage: 25%
 - Minimum front yard: 25' to 50'



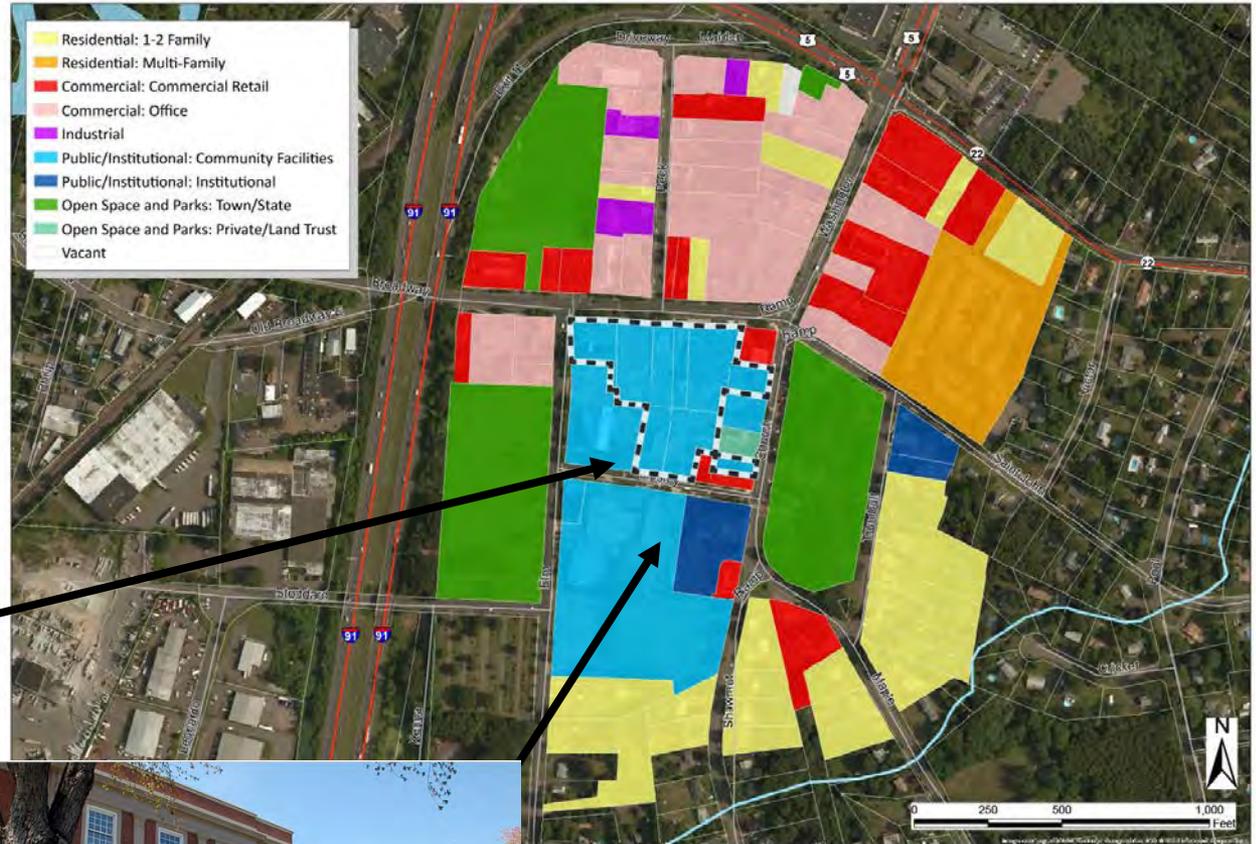


Focus Area: Town Center

- Concept: relocating most Town services to another location
- Retain Town Hall, Library, and Rec. Center/Pool
- Opens 4.8 acres of developable land in Town Center area
- Annex: may consider conversion to 55+ housing

Town Center Land Use

North Haven POCD



Example: Quaker Green condos in former middle school – West Hartford

About this map: Boundaries, Hydrography, State Parks: DEEP (2011)
Streets: ESRI (2011) Parcels: Town of North Haven (2015)



Public Engagement Update

- May 3rd Workshop results
- Survey midpoint (still open and collecting responses)



Workshop Results

- About 40-50 participants arrived for 90 minutes of conversations, feedback, brainstorming
- Housing feedback
 - Gaps in the housing market: a majority think young adults and retirees lack affordable options in North Haven
 - Majority see a need for some kinds of multi-family housing in appropriate areas
 - Support for CCRC-style elderly housing options





Workshop Results

- Economic development feedback
 - Retail wishes: clothing/dept. stores, more mid-range/non-chain dining options
 - Reduce vacancies in shopping centers
 - Build out and adding life and activity to Town Center area
 - Support for mixed use, apartment, office and medical center development examples

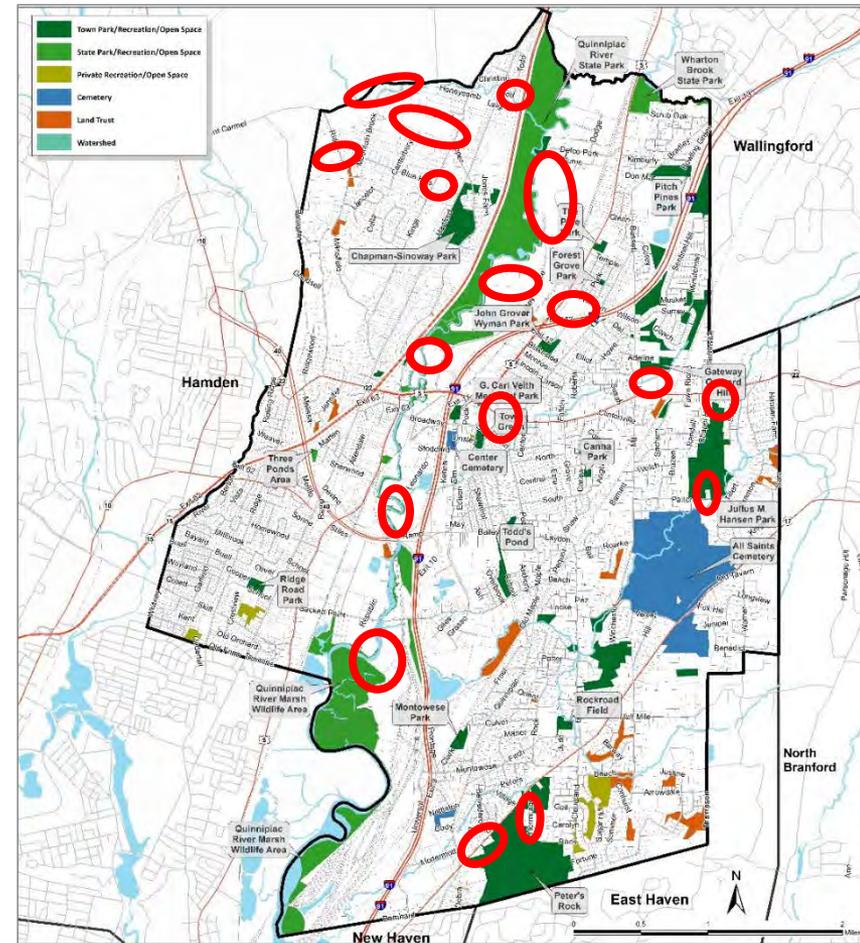


Visual Preference Results: Is This Development Appropriate for North Haven?						
Rating	-2	-1	0	1	2	Average
Upper Washington						
<i>Milford Res</i>	0	0	0	0	2	2
<i>WeHa Office</i>	0	0	0	0	2	2
<i>WeHa Res</i>	0	0	0	0	3	2
Town Center						
<i>Main St. Ridge.</i>	0	0	0	0	4	2
<i>Eric Town Sq.</i>	0	0	1	2	3	1.33
<i>Madison Office</i>	0	0	0	1	2	1.67
Medical Center						
<i>Exchange Farm.</i>	3	0	1	1	1	-0.5
<i>Uconn Canton</i>	0	0	0	0	3	2
<i>Gateway Glast.</i>	0	0	0	0	3	2



Workshop Results

- Open space & parks feedback
 - Improve trails and cleanup around Quinnipiac River
 - Develop and connect to Linear Trails
 - Suggested open space parcels to acquire:
 - Mt. Carmel/Blue Hills area
 - North Haven Fair, St. John St. near Town Green
 - Extensions of QR State Park & Wildlife Area
 - Adjacent to Peter's Rock, J.M. Hansen Park, Chapman-Sinoway

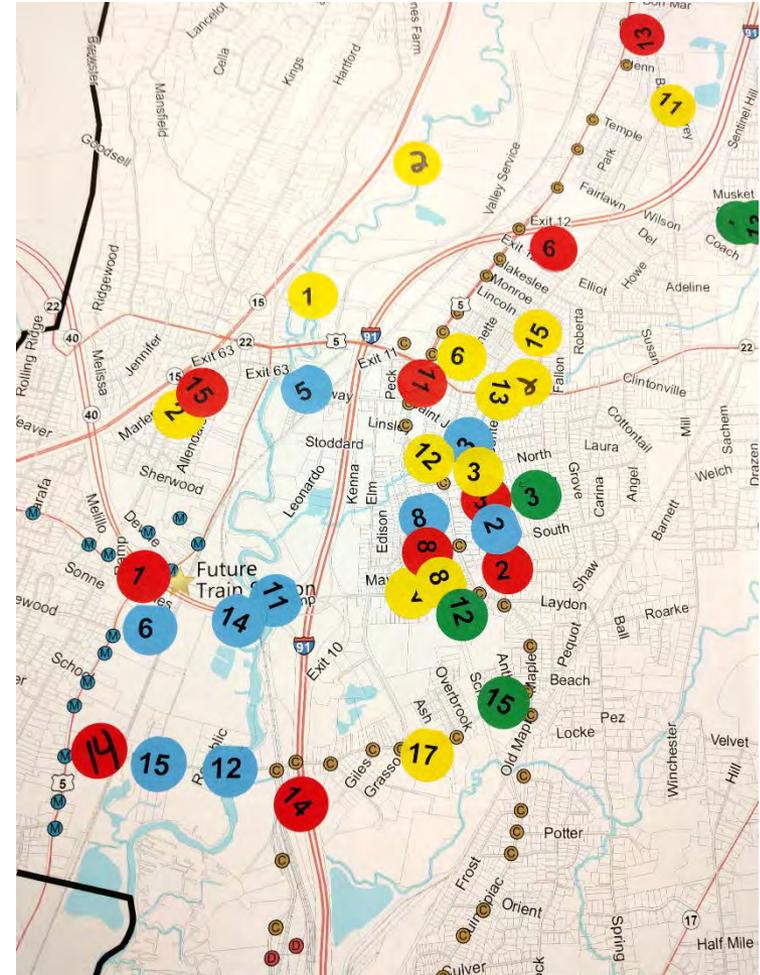


 Open Space Suggestion from May Workshop



Workshop Results

- Transportation feedback
 - Traffic hotspots: Mt. Carmel, Pool Road, Dixwell & State, Sackett Point & State
 - Transit priorities: better access to Hamden, additional parking for train station
 - Desire for bike lanes (Hartford, Middletown, Washington) and more/improved sidewalks (Pool, Maple, town center and middle/high school areas)



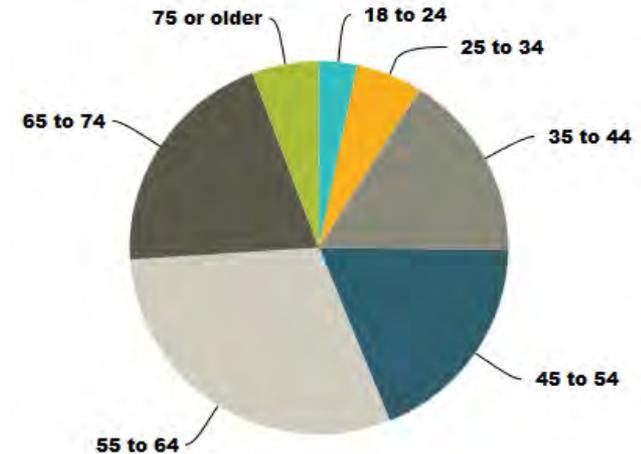


Survey Preview

- 127 responses to adults survey
- 11 responses to youth survey
- Majorities of respondents are 55-74, single family homeowners, and long-time/lifetime residents
- 87% are happy with conditions of their neighborhoods
- Common issues: traffic & road conditions, empty storefronts, crime rates, QU worries, and the effects of the town's demographic transition on schools

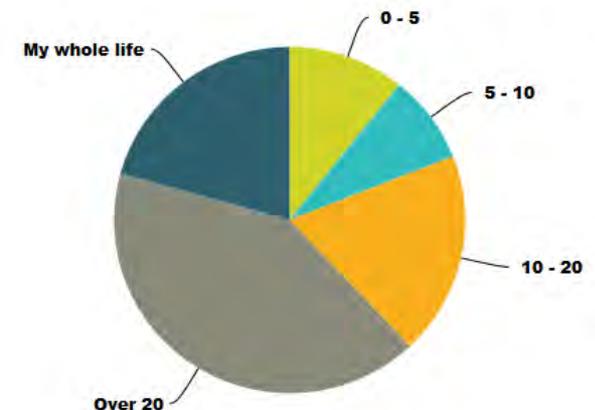
What is your age?

Answered: 123 Skipped: 1



How many years have you lived (full-time or seasonally) in North Haven?

Answered: 121 Skipped: 3



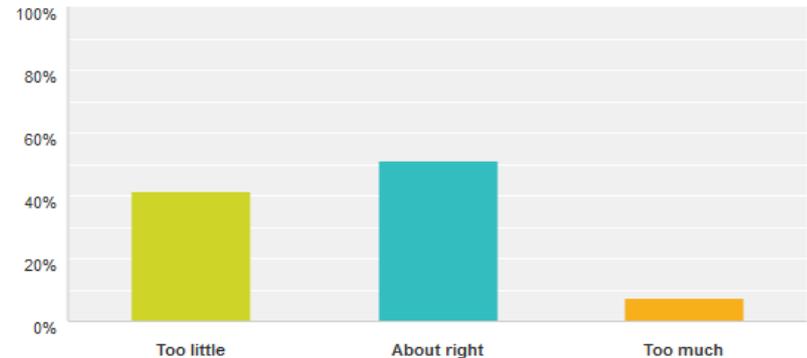


Survey Preview

- Divided opinions on need for more affordable housing stock
 - Mixed use, conservation subdivisions, accessory apts seen as best options
- Road issues: Ridge Rd, Mt. Carmel Ave, Middletown Ave
- Majorities agree that sidewalks are poorly connected and bicycle routes and trails should be improved and expanded
- Unmet demand for transportation alternatives

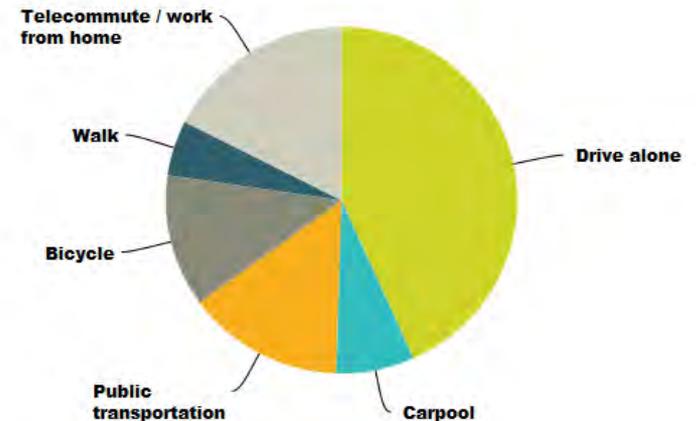
The current amount of affordable housing in North Haven is

Answered: 94 Skipped: 16



How would you prefer to commute if all options were available to you?

Answered: 97 Skipped: 30



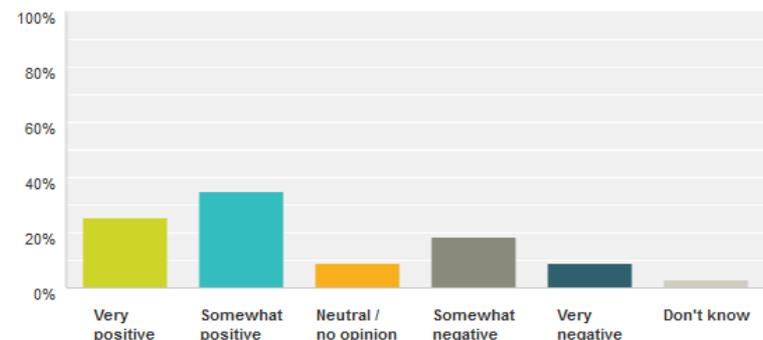


Survey Preview

- Community involvement
 - Many participate regularly in sports, religious groups
 - Volunteers with Town groups, neighborhood associations, firefighters, PTA, Historical Society, Trails Assoc., Land Trust, and many others
- Schools receive favorable reviews (about 4 in 5 say overall experience is good or excellent)
- Variety of opinions on impacts of Quinnipiac: many see both upsides and downsides, but about 60% view expansion as a net positive

How do you feel about the possibility of Quinnipiac growing in North Haven?

Answered: 109 Skipped: 18





Next Steps

- June Working Group Meeting
 - Discussing key initiatives from previous action agenda
 - Towards new action steps
 - Next two meetings focused on actions, strategies, and goals
 - Survey results
- Close survey mid-June