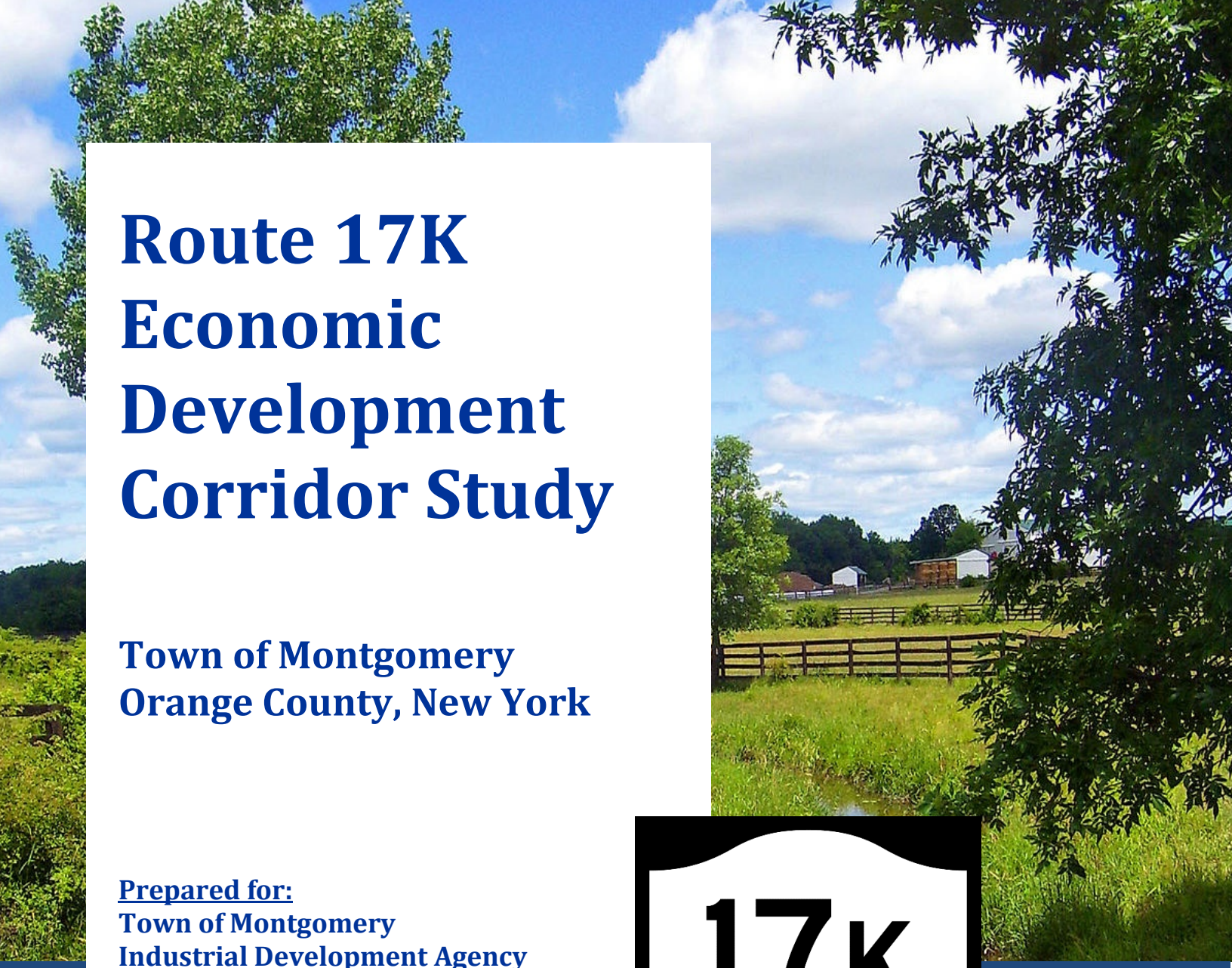

Route 17K Economic Development Corridor Study

Town of Montgomery
Orange County, New York

Prepared for:
Town of Montgomery
Industrial Development Agency

Prepared by:
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January 12, 2021

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Table of Contents

List of Tables:

List of Figures:

1.0 EXECUTIVE SUMMARY

*The purpose of the **Route 17K Economic Development Corridor Study** is to evaluate the land base along Route 17K from I-84 Exit 6 to the Village of Montgomery and the area around the Orange County Airport.*

The Study will identify the opportunities and constraints for economic investment in a transparent manner to define the potential location, scope and scale of development together with zoning recommendations, design standards and community enhancements appropriate for the corridor.

The Route 17K Corridor in the Orange County Town of Montgomery is subject to substantial development interest due to excellent access to the Interstate Highway system and proximity to the largest population centers in the East Coast of the U.S.

While economic investment will increase the tax base and create jobs, the location, scale and nature of such development must be in harmony with the community's vision and the quality of life in the Town must be protected and enhanced. Furthermore, as the main local access, the Route 17K Corridor must feature an attractive roadside aesthetic to welcome residents and visitors.

The Town has recently engaged in an update to the Comprehensive Plan and companion evaluation of the Town's water and sewer infrastructure. The Comprehensive Plan update will identify the community's vision and the infrastructure plan will delineate the match between utilities and that vision, including ensuring that those that benefit from the provision of public services pay for those services equitably and fairly.

It is expected that the Comprehensive Plan update will recommend much-needed updates to modernize and strengthen the Town's land use controls, including zoning updates. The infrastructure plan will prioritize improvements to maintain the level service to present users and plan for the demands of new users including the mechanisms for new users to fund improvements from which they benefit.

A mechanism to focus economic investment geographically that allows the Town to reap the benefits of an improved tax base and new employment while preserving and enhancing the quality of life of current residents and small businesses is needed to support the Comprehensive and Infrastructure plan updates. Land use and infrastructure updates in the absence of an understanding of the intersection between community goals and development requirements risk ad hoc interpretation and numerous variances. This study supports the Comprehensive and Infrastructure plan updates and act as a springboard for grant applications for the conduct of environmental review, zoning updates and public-private partnership for infrastructure investment.

Methodology:

Tasks in the Corridor Study included a kick-off meeting led by the IDA with local leaders to refine the geography of the corridor study boundaries and project deliverables. Corridor specific data regarding real property, land use, natural resource (e.g. wetlands, slopes, cultural resources, rare species, etc.) and infrastructure including water, sewer, power and telecommunications data as well as any data gaps were identified. Analysis of the availability of land for development, building activity, leads in progress, mixture of land uses, features that increase the cost of development, catchment analysis using ESRI Business Analyst software, and leakage of services were also conducted. Finally, build-out scenarios were developed to support land use regulation updates.

The Corridor Study has resulted in an opportunities and constraints analysis that provides an objective review of site development potential, environmental constraints, sectors attracted to the corridor, build-out scenarios and commensurate demand for services (e.g. water, sewer, telecommunications, power, traffic, etc.), likely investment and employment opportunities, recommended uses and scale of development to be incorporated in enforceable land use regulations, and a sequence of steps towards sustainable development of the Route 17K corridor.

The Corridor Study is a tool that positions the Town of Montgomery to proactively guide focused economic investment in the Route 17K corridor. Wide-ranging business sector options are identified to diversify land use. A well-defined vision and predictable process results in quality investment by good-neighbor companies and robust employment.

Phased Approach:

The Corridor Study is the first phase of three envisioned to achieve the objective of sustainable economic investment in the Town:

Table 1: Phases of Sustainable Economic Investment

Phase 1: Development Corridor Study	Phase 2: Environmental Review, Land Use Regulations, and Permitting	Phase 3: Infrastructure Design and Construction
• Determine Market Potential and Obtain Public Input • Identify Opportunities and Constraints; • Leverage Document to Apply for Grants to Support Phase 2	• Engage the Public • Detail Existing Environmental Conditions • Potential Impacts and Mitigation Measures • Outline Steps for Economic Investment • Adopt Land Use Regulations • Leverage Documents to Apply for Grants and Low-Cost Financing to Support Phase 3	• Construct in Public-Private Partnership the Infrastructure Required to Support Envisioned Economic Investment

GEIS | ZONING | INFRASTRUCTURE | WORKFORCE | MARKETING

- *Prepare Generic Environmental Impact Statement (GEIS) to establish environmental thresholds for future projects*
- *Amend the Town's Zoning Code to include visionary zoning for the Corridor.*
- *Secure federal and state infrastructure funding.*
- *Develop and implement a workforce development plan to attract talent and create a local and regional pipeline.*
- *Develop site marketing materials and build relationships with site selection and commercial real estate professionals.*
- *Identify companies in New York City and other regional locations in the Northeast that connect to the targeted sectors*
- *Identify the best development sites and work with site ownership to determine willingness to sell and define the role owners wish to hold in the development of their land.*

Major Recommendations:

GEIS and Re-Zoning

Conduct of a broad environmental review under the State Environmental Quality Review Act (SEQRA) and the National Environmental Policy Act (NEPA) to identify current conditions, envision community- supported economic investment through robust public participation as well as public benefits, determine potential environmental impacts on a broad scale and document mitigation measures to reduce or eliminate potential impacts paves the way to sound, sustainable development in the corridor is recommended.

The preparation of a **Generic Environmental Impact Statement (GEIS)** establishes thresholds for future projects under which the SEQRA process for applications for site plans and subdivisions is streamlined and focused on mitigation measures for site specific impacts. Robust public participation will be conducted in scoping as well as Draft and Final GEIS review. This creates value in that it ensures that projects are aligned with community vision while providing developers and end users a predictable time frame for local approvals. With respect to NEPA, pursuit of United States Economic Development Administration (EDA) grants necessitate conduct of NEPA.

The GEIS is envisioned to incorporate an environmental review of the recommended land use regulations such that at the conclusion of the GEIS, the zoning code may be amended to include visionary zoning for the Corridor.

Infrastructure

In conducting the GEIS and Rezoning, the scale of development and a list of targeted sectors will be finalized. Upon the completion of this process, infrastructure is yet to be addressed. Grants will be secured, with prior planning positioning the sites for soon to be available federal and state infrastructure dollars. All indications are that communities prepared for economic development and creating value-added employment will be well positioned for this financial support. Ideally, the balance of infrastructure costs not supported by grants or low-cost financing is supported by the private sector beneficiaries of the infrastructure.

As this planning and approval process is completed, and the remaining investment for infrastructure defined, the end product will be predictable and dynamic in the marketplace. With sites ready to accommodate the community's priorities, success will be achievable through valued added job creation driven by significant private investment.

Workforce Development and Attraction

While the Town has land base that will be attractive for development with the proper zoning, this Corridor Study documents a critical workforce challenge. It is crucial that the County, Town and IDA use the time throughout the GEIS, re-zoning and infrastructure implementation rollout to develop and implement a workforce development plan to attract talent and create a local and regional pipeline. Partnership between the IDA, Town, County and educational institutions including Orange County Community College and other institutions of higher education is key to the success of such an effort.

Site Marketing

A top priority of the IDA should be to secure partnerships for advancement of site readiness and approvals. Marketing of sites will be limited until some level of site predictability is achieved and supporting infrastructure with capacity expansion plans solidified with a detailed timeframe. However, marketing materials, community demographics, and any other relative information required in a site selection process can be prepared during this timeframe.

As this strategy is advanced, it is highly recommended that the IDA work to build relationships with site selection and commercial real estate professionals. Establishing a network of those responsible for identifying and evaluating sites for future projects, targeted towards those with expertise in the identified sectors of preference, is essential for success. At the time in the process that site predictability is better defined, site information can be shared with an established network of critical partners.

Another action to be taken by the IDA is to identify companies in New York City and other regional locations in the Northeast that connect to the targeted sectors, and work to build relationships as well, such that when sites are ready, a direct marketing strategy is in place and ready to advance.

Concurrently, the IDA should work to identify the best development sites and work with site ownership to determine willingness to sell and define the role owners wish to hold in the development of their land. A variety of partnerships and structures should be considered, including but not limited to site options, price guarantee, sole development, public/private partnership or establishment of a private LDC to lead the development.

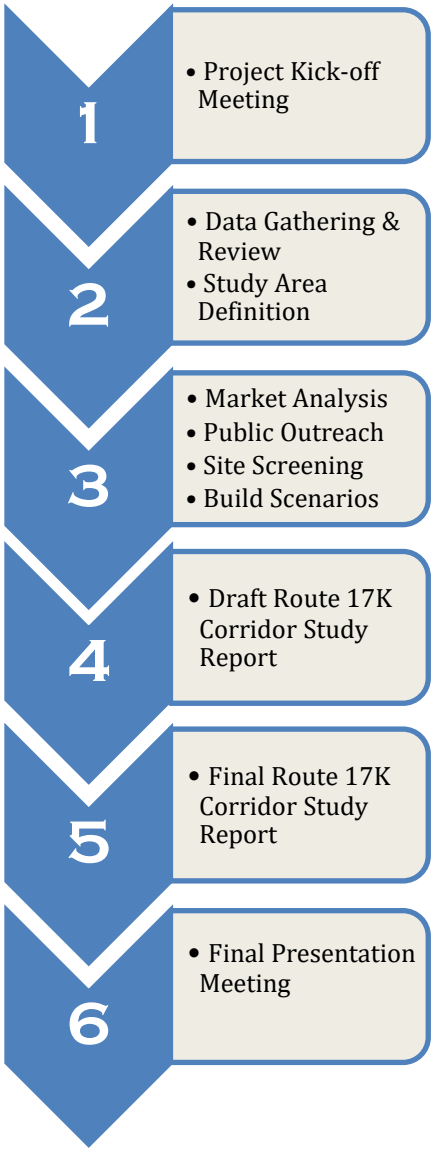
Lastly, it is strongly recommended that the IDA continue to build local and regional partnerships. County and town boundaries are transparent to quality regional development. Find the valued relationship, company or talented opinionmaker that can help achieve the ultimate goal of transforming the local economy, then build the relationship with the goal of setting a path towards improving the business climate, creating efficiency and bringing the most value to the community.

Intended Results

The Corridor Study has been prepared in consideration of multiple benefits including coordination with the Town's Comprehensive Plan Update and positioning the IDA for grant opportunities to support next steps. While the Comprehensive Plan will outline the community's vision for the entire Town, the Corridor Study objectively assesses the market potential of a limited area of the Town. By having both processes proceed simultaneously, ultimately, the Town Board will be well informed to make decisions governing land use in the Town, and in particular, in the Corridor Study to meet the objectives of the community to preserve important land as open space or for residential and community-scale land uses while focusing economic investment that provides the tax revenue to support quality of life in appropriate locations.

2.0 METHODOLOGY

Preparation of the **Route 17K Economic Development Corridor Study** was approached from an objective perspective. Both publicly available data as well as qualitative research was conducted to support the Study. The methodology utilized is described to inform the understanding of the purpose and products of the Corridor Study.



TASK 1: PROJECT KICK-OFF MEETING

At the recommendation of the consulting team, the IDA leadership created a Working Group including the Chairman and a representative of the IDA Board, the IDA's Executive Director, the chief elected official of the Town and the three villages within the Town, the County Planning Commissioner and the County Economic Development Director. The purpose of the Working Group was to provide guidance and feedback to the consulting team during the preparation of the Corridor Study and outreach to the public and stakeholders.

Representatives of the consulting team attended a meeting with Working Group to refine the objectives and deliverables of the Corridor Study and to define the boundaries of the study area. A summary of the Kick-Off meeting discussion is provided as **Appendix A**.

TASK 2: DATA GATHERING, REVIEW AND STUDY AREA DEFINITION

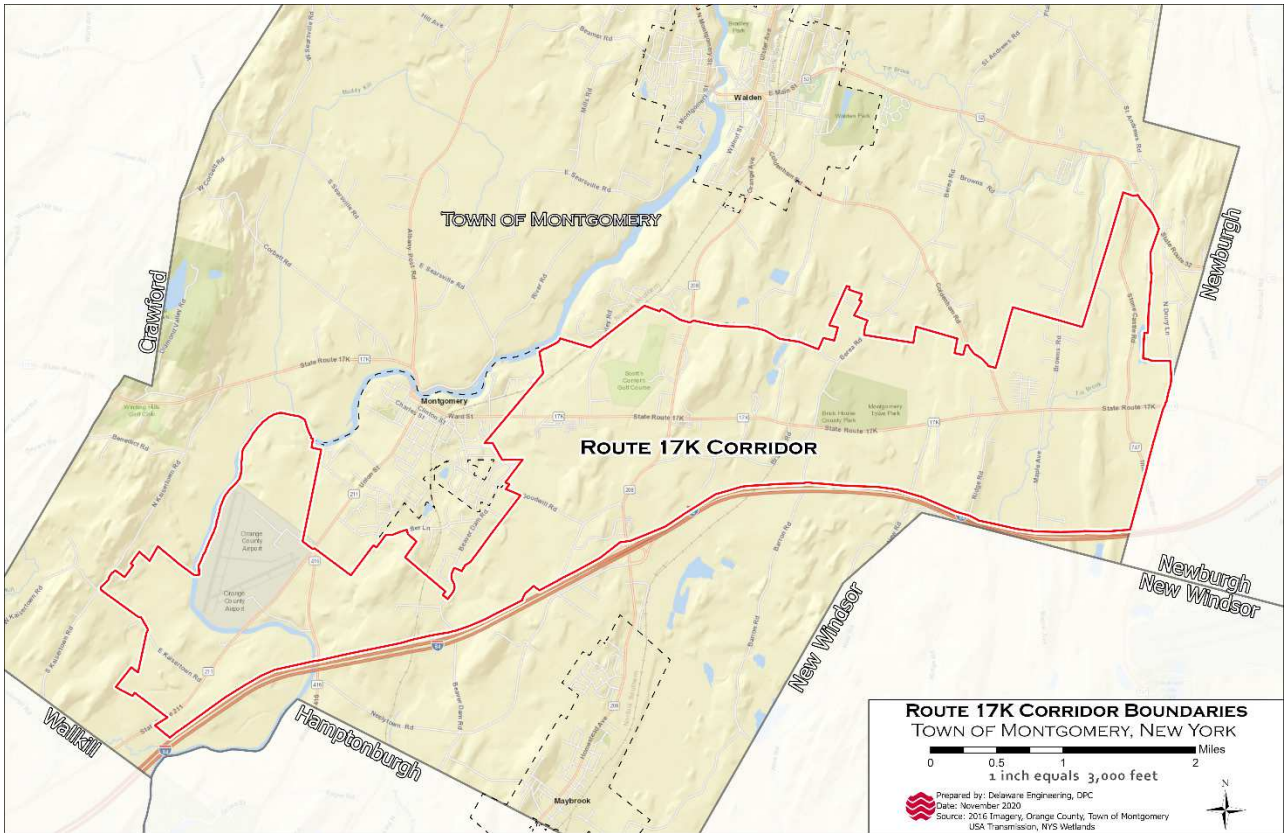
Utilizing publicly available data, data was gathered to support analysis, including, but not limited to:

- Land Use (GIS-based Real Property Service Data)
- Public Open Space and Recreation
- Natural Resources
- Zoning Districts and Allowable Uses
- Infrastructure (water, sewer, power, telecommunications, internet connectivity)

With this data gathered, the information was reviewed with the Working Group to identify data gaps, the need to gather additional information and methods to do so. A written summary of available data along with any limitations was presented to the Working Group along with a map of the corridor study area boundaries.

Figure 1 below presents the resulting study area boundary that was agreed upon by the Working Group after a number of iterations.

Figure 1: Study Area Boundaries Map



The Route 17K Corridor Economic Development study area is bound to the south by Interstate 84 and to the east by the Montgomery town line. On average, it includes parcels no greater than two-thirds of a mile north of Route 17K. The District also includes all of the parcels adjacent to the full length of Sand Castle Road.

In the west, the study area encompasses all of the real property owned by Orange County, surrounding and including the Orange County Airport. It includes all properties to the east of the Airport excluding existing residential neighborhoods. It also includes parcels to the south of the Airport that are adjacent to the County-owned lands. The district does not include any parcels that are within the Village of Montgomery's boundary.

Task 3: Analysis

A. Market Analysis

The consultant team conducted an evaluation of market conditions in the region and competitive regions through review of the following information:

- Availability of land – GIS data from Real Property Services (RPS)
- Building activity – IDA and Real Estate information
- Leads in progress – IDA and other local resources
- Mix of industrial and commercial uses – GIS data as well as local knowledge
- Cost of building – Based on recent land development projects
- Cost of permitting/timeframe to development – Local knowledge of zoning and permitting
- Development catchment area (the geography or sectors from which development interest is generated or focused) – Based on local knowledge and custom ESRI Business Analyst Data
- Determine leakage (consumer spending on goods and services outside the study area) of existing services - Based on local knowledge and custom ESRI Business Analyst Data

With respect to detailed Market Analysis, a variety of Northeast sources and market activity was utilized to create business park and corridor development objectives by both sector type and scale. These sources included site selector/commercial real estate professionals, local/regional and northeast based economic development professionals and NYS Empire State Development. In addition, extensive previous development experience, professional contacts and overall research on current development trends, innovative development practices and resulting shifts in private developer/corporate real estate objectives caused from the overall impact of the COVID 19 crisis were utilized to develop the Market Analysis.

B. Public Outreach

During the Market Analysis, two public information sessions as well as a stake holder meeting were conducted. The purpose of these meetings was to seek local opinions on regional opportunities, entrepreneurial activity and overall priorities in the community.

The format for each public meeting was an open house, with a map of the Corridor Study area with parcel boundaries and an aerial photograph and labels of roads and major landmarks as the background for orientation purposes. Additionally, inspiration boards were presented to depicted potential commercial, industrial and mixed uses. Through an introductory statement, attendees were encouraged to use sticky notes to provide thoughts and comments regarding the existing land uses on the corridor and the inspiration land uses as well as any other points of interest. Copies of the inspiration boards is provided as **Appendix C.**

The stakeholder meeting assembled a group of property owners, real estate professionals, local engineers and attorneys regularly engaged in land development in the town and region. While the presentation materials were the same for this meeting as for the public input sessions, the format was a roundtable discussion with stakeholders providing input regarding their interests in the Corridor area and what is working and is not working to meet the demands of the market.

C. Site Screening

Working in conjunction with the IDA and GIS/RPS data, in consideration of natural constraints, an evaluation of the land base within the Route 17K corridor and surrounding the Orange County Airport was conducted. Given the identified market conditions as well as properties on the market and vacant or underutilized land, the consultant team developed criteria for screening sites including but not necessarily limited to:

- Minimum site size for developable area (e.g. eliminate wetlands, watercourses, steep slopes, etc.)
- Maximum distance from highway access
- Surrounding land uses

D. Build Scenarios

The team applied the screening criteria to properties in the Corridor to evaluate the overall potential for the Corridor to meet market demands. Based on this, generic build scenarios were created and square foot of potential development was calculated. The generic build scenarios together with tabular data regarding square footages were reviewed with the Chairman and Executive Director of the IDA to secure feedback regarding scope and scale of the market vision.

The Development Potential analysis also included a visionary look at potential transformational sites with related development scale and sector analysis across the 17K Corridor and Orange County Airport area with other strategic and adjacent parcels. The purpose of this step was to develop concepts for innovative zoning recommendations and strategic planning for public infrastructure. This process was visionary and did not include contacting property owners as in many cases, the existing zoning and/or infrastructure does not permit the vision. If the Town embraces the zoning recommendations, then it is expected that a very comprehensive public engagement process would be conducted to secure property owner input.

TASK 4: DRAFT ROUTE 17K CORRIDOR STUDY REPORT

The consultant team has prepared this Draft Report which includes a brief summary of site and neighborhood analysis and identifies key opportunities and constraints in terms of development and contribution to the public realm. The draft report also identifies and discusses the balance between competing interests and other limitations. The consultant team will attend and participate in a meeting to review the Draft Report and will engage in discussions with IDA leadership and others to finalize the economic development corridor study.

TASK 5: FINAL ROUTE 17K CORRIDOR STUDY REPORT

On the basis of the feedback provided during the review of the Draft Report, the consultant team will deliver a final Route 17K Economic Development Corridor Study, which will include a detailed outline of next steps to bring the vision of the Route 17K Corridor to fruition.

TASK 6: ATTEND/PARTICIPATE IN FINAL PRESENTATION MEETING

The consultant team will attend a meeting with the IDA as well as local, county and regional leaders to present the findings of the Route 17K Economic Development Corridor Study and respond to questions and comments.

3.0 EXISTING CONDITIONS, OPPORTUNITIES, & CONSTRAINTS

3.1 Natural Resources

- Geologic Profile
- Water Resources
- Air Resources
- Terrestrial and Aquatic Ecology
- Historic & Archeological Resources

The following sections summarize the existing natural resources found within the Route 17K Corridor boundary. Along with the categorical presentation of existing features, the opportunities and constraints which have been derived from the type and scale of these resources will be discussed.

This Corridor is relatively well aligned to support and welcome the development envisioned within this study. The infrastructural, natural, and historical constraints will require time, funding, and innovation in order to be addressed; however, there are no constraints that should be considered substantial barriers to most types of development.

3.1.1 Geologic Profile

Existing Conditions

The Route 17K Corridor Study Area is comprised of 6,549 total acres. The undeveloped land within the Corridor is made up primarily of former agricultural land, wetlands, and secondary forest habitat.

The surficial geology (**Figure 2**) is predominantly silty glacial till east of Montgomery Village, along with areas of sandy glacial till and fine-grained proglacial sediment on the western side of the corridor. Slopes of over 25% make up less than one-half percent of the total land within the study area (**Figure 3**).

There are 39 individual soil types throughout the Corridor Study Area. Pittsfield Gravelly Loam soils make up 23.5%, Bath-Nassau Silt Loam soils make up 17%, Udorthent soils make up 9%, Canandaigua Silt Loam soils make up 9%, and Alden Silt Loam soils make up 7.3% of the study area. The other types each constitute less than 5% of the total area.

Approximately 80% of the study area soils are either prime farmland, farmland of statewide importance, or hydric (seasonally/permanently saturated). Prime farmland soils make up 26.5% of the study area and farmland soils of statewide importance make up 41% of the study area. Another 25% of the study area is made up of hydric soils.

Opportunities

The entirety of the Corridor lacks exposed bedrock and has little topographic variation. Development will not require significant grading to be viable for most areas. The geological setting of the Corridor is highly conducive to small-scale and mid-scale development opportunities. The wealth of prime farmland and soils of statewide importance provide the Town with agricultural-based development opportunities.

Constraints

The abundance of prime farmland and soils of statewide importance may be restrictive to non- agricultural development as they possess the greatest potential for agricultural productivity. The presence of hydric soils may limit development opportunities for those areas outside of the public sewer districts.

Figure 2: Geologic Profile Map

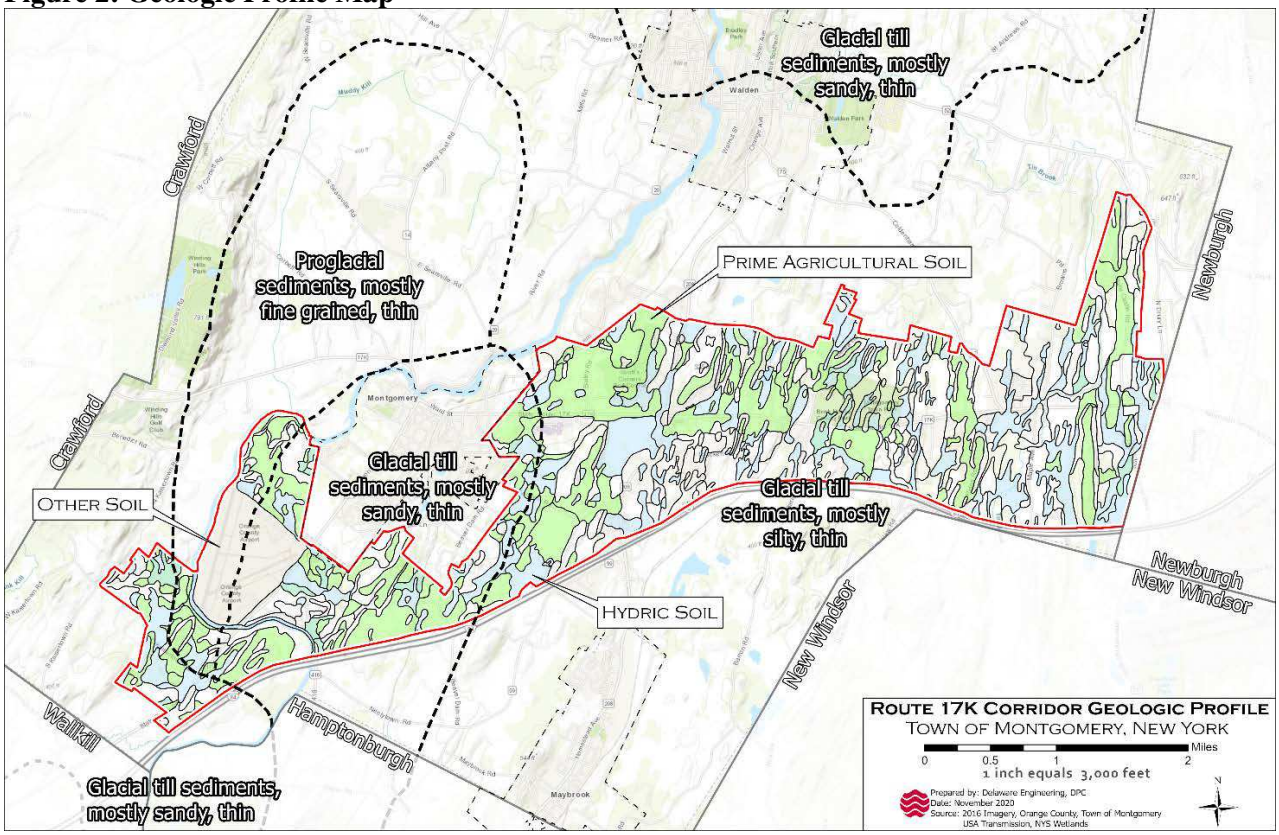
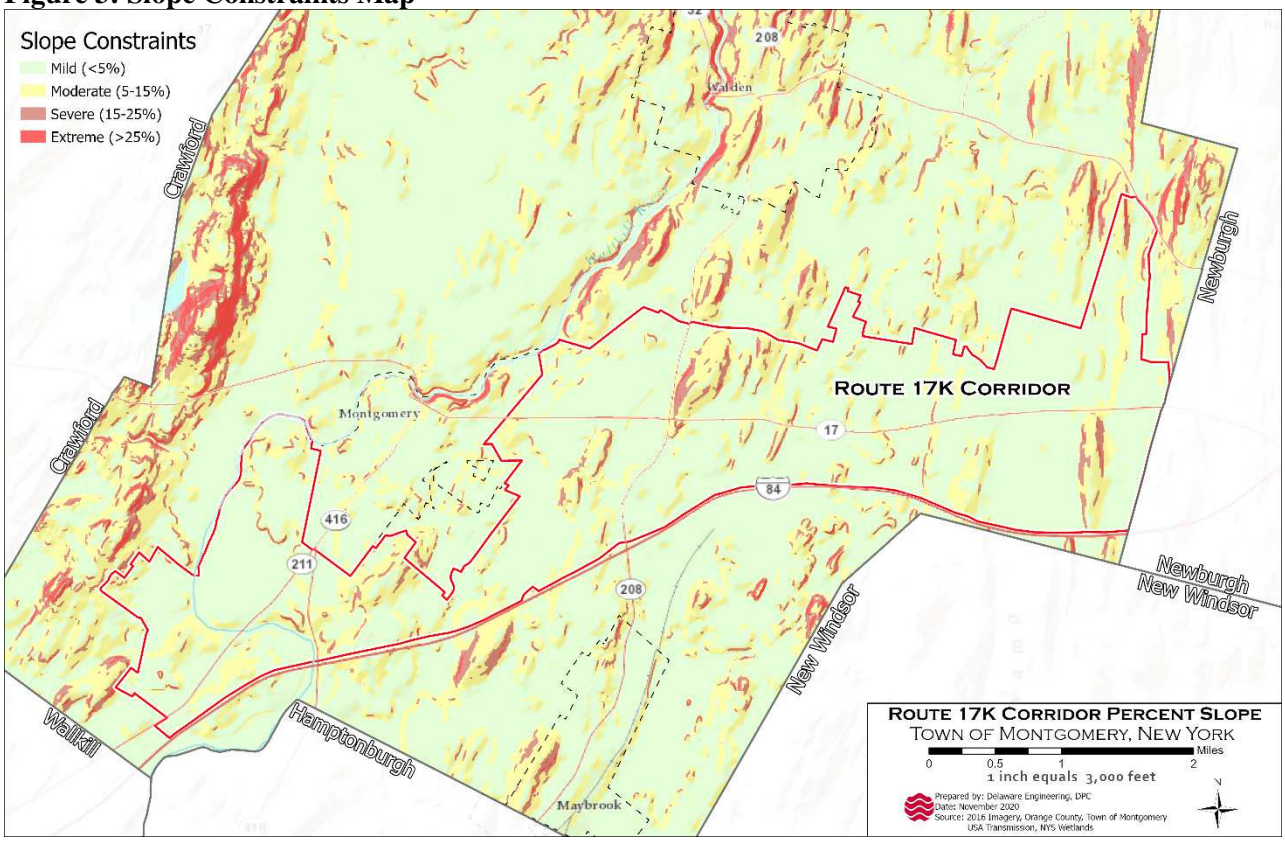


Figure 3: Slope Constraints Map



3.1.2 Water Resources

Existing Conditions

All of the features discussed within this section are illustrated within **Figure 4** on the following page.

The primary surface water feature within the Corridor is the Wallkill River which creates the western boundary of the study area. The largest water bodies, aside from the river, include two wetland ponds with open water found at the northwest intersection of NYS Route 747 and Interstate 84 and at the southwest intersection of NYS Route 208 and NYS Route 17K.

The 100-year and 500-year flood hazard areas are primarily present along the course of the Wallkill River, including the areas around and including the Orange County Airport. The 100-year flood hazard area also includes the smaller tributaries to the Wallkill as well as some of the isolated wetlands within the Corridor.

A total of 17 wetlands are present within the study area that are regulated by the NYS Department of Environmental Conservation. The largest of these wetlands are found to the west of Stone Castle Road and to the west of Maple Avenue. There are also dozens of smaller non-jurisdictional wetlands scattered through the Corridor. In total, there are approximately 832 acres of wetland within the study area; this calculates to 12.7% of the Corridor.

The primary groundwater resources within the Town are three unconfined stratified drift aquifers. Only one of these aquifers fall within the boundary of the study area and is 249 acres with a withdrawl flow rate of 10 to 100 gallons per minute. Adjacent to the study area is an 82-acre aquifer with a withdrawl flow rate of over 100 gallons per minute. Outside of the corridor, but still within the Town of Montgomery, is a 2,884-acre portion of a 7,417-acre aquifer. There is a withdrawl flow rate of over 100 gallons per minute for 1,024 acres and 10 to 100 gallons per minute for the remaining 1,860 acres of the aquifer within the town boundary.

Opportunities

The Wallkill River is an asset to the community through the economic, educational, and recreational opportunities it presents. The presence of the river has the ability to enhance design and construction in a way that is harmonious with its natural rhythm and preserves its biodiversity.

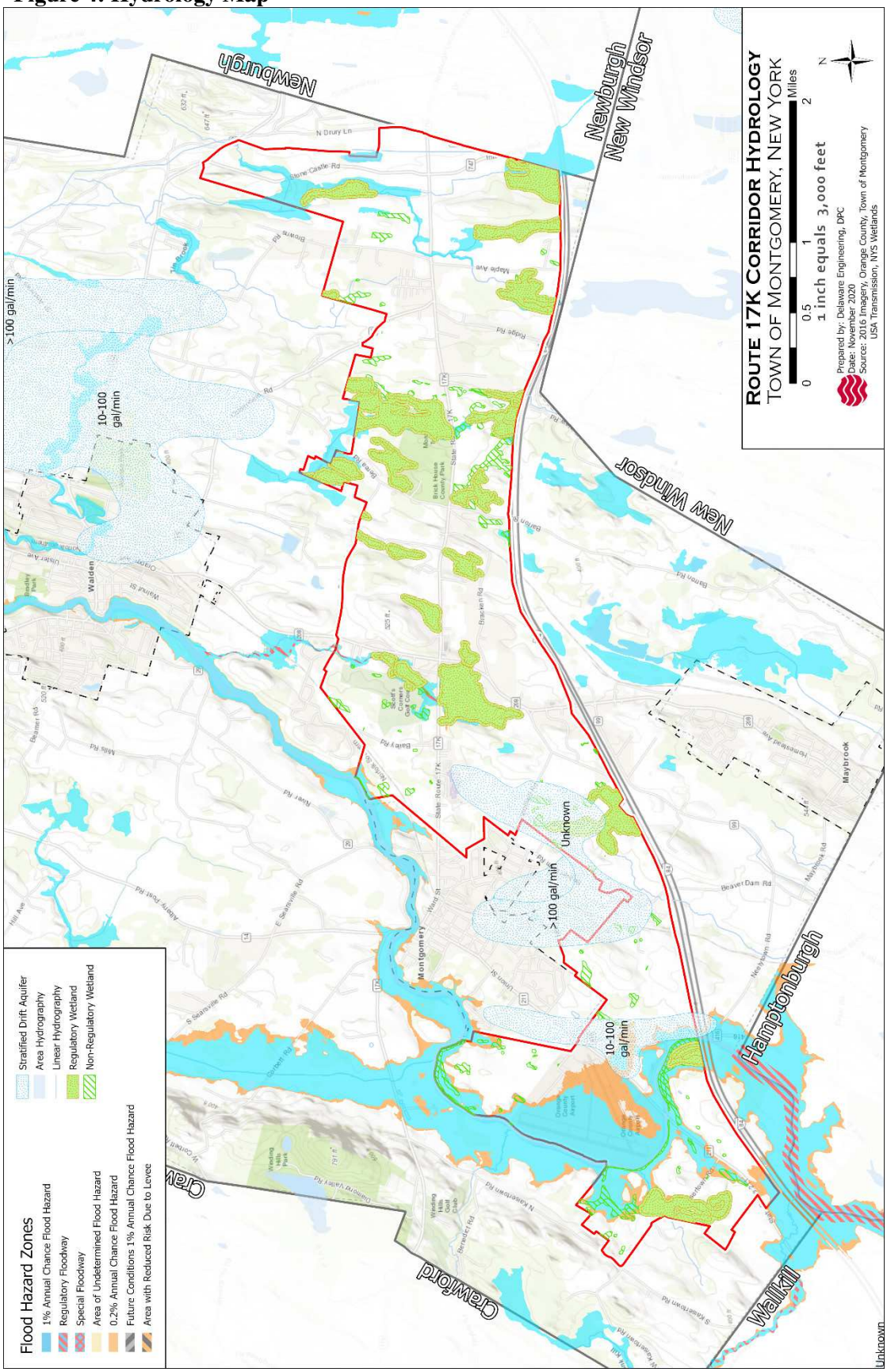
The abundance of larger wetlands throughout the Corridor provides opportunities for the preservation of habitat along with the possibility of recreational interconnections between neighborhoods, businesses, and other community assets.

Constraints

Any development within the flood hazard area would need to be raised above the 500-year zone. The smaller tributaries and isolated wetland areas would constrain development to a lesser extent than those areas along the Wallkill. Significant grading would be necessary to develop within the flood areas adjacent to the Wallkill River.

The Town lacks any large surface water features that could be used as a major consolidated water source. Therefore, groundwater will most likely need to be relied upon for future expansion of the water system. The limitations of the groundwater yields will in-turn be the limitations to the types of development within the Corridor.

Figure 4: Hydrology Map



3.1.3 Air Resources

Existing Conditions

The best existing data for air quality within the Route 17K Corridor is the County Level Attainment Status of National Ambient Air Quality Standards. The US EPA requires that transportation and air quality conformity be demonstrated by metropolitan planning organizations in air quality non- attainment and maintenance areas (OCTC).

The NAAQS measurements include Carbon Monoxide, Lead, Nitrogen Dioxide, Ozone 2008, Ozone 2015, Particulate Matter 2.5 2006, Particulate Matter 2.5 2012, and Sulfur Dioxide. Orange county is in attainment for all measures of air quality except for Particulate Matter 2.5 for 2006. Effective April 18, 2014, EPA approved NYS's request to redesignate the New York portion of the nonattainment area to attainment for the 1997 annual and 2006 24-hour PM2.5 standard, therefore, the area is referred to as a PM2.5 Maintenance Area. (OCTC)

There are five State Permit Facilities within or adjacent to the Town of Montgomery. These facilities include Russin Lumber Corporation in the Village of Maybrook along with Maybrook Asphalt Plant, Taylor Biomass Gasification, Montgomery Wallboard Processing Plant, and Carlisle Construction Materials all located on Neelytown Road.

Figure 5 shows the air quality index for the Hudson Valley in December of 2020. The Corridor is due west of Newburgh on the map and the quality is shown as moderate.

Figure 6 shows the ten registered air facilities that are closest to the Route 17K Corridor along with the Maybrook Asphalt Plant as the closest State Permit facility.

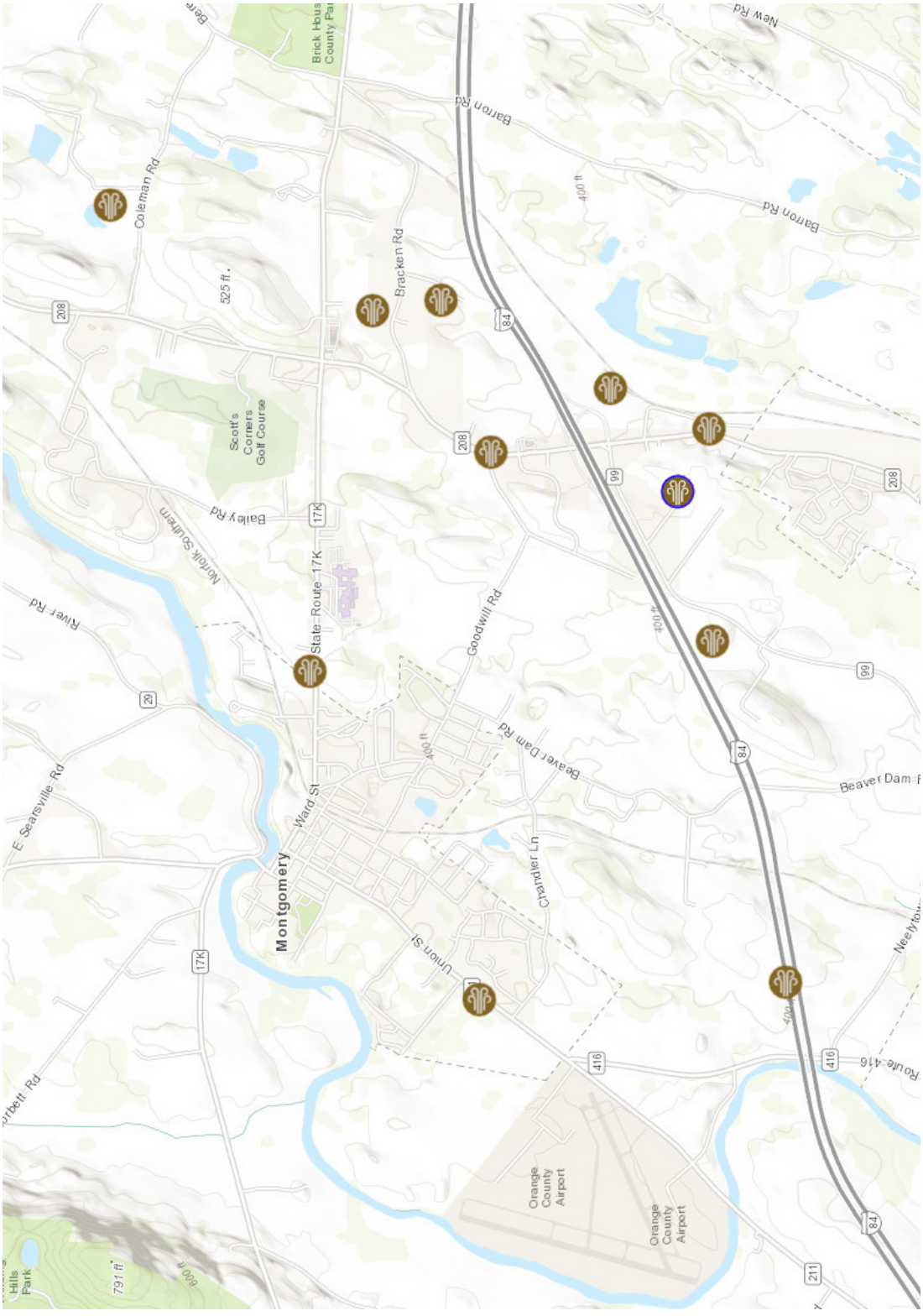
Opportunities

There are currently no Title V Permit Air Facilities within the Town of Montgomery. The nearest facility of this nature is the Metal Container Corporation located to the south of Stewart Airport in the Town of Newburgh. None of the State Permit Facilities fall within the boundary of the study area. The nature of the current uses within the Corridor are residential, commercial, recreational, and industrial. All air quality standards will be enforced by the appropriate regulatory agencies. There will also be a development-by-development site plan review process that would review any and all impacts associated with air quality.

Constraints

There are currently no limitations in the corridor due to air quality, as the region is in compliance with the EPA and DEC Standards.

Figure 5: Air Facilities Registrations and State Air Permits



https://gisservices.dec.ny.gov/gis/dil/

3.1.4 Terrestrial and Aquatic Ecology

Existing Conditions

The Corridor and the entire Town are located within the Ridge and Valley Ecoregion of northern glaciated shale and slate valleys (**Figure 5**). Although much of the valley has been cleared for agriculture, there are pockets of ecological significance. Stream and rivers with riparian buffer zones support some rare and threatened species, such as the eastern lamp mussel and bog turtle. Grassland birds and raptors may be found in fallow fields or in areas that are not intensively farmed.

The local flora is part of the oak-northern hardwood natural vegetation zone of the Hudson Valley. More specifically, this area is within the Central Hudson zone which primarily includes northern hardwoods and pioneer hardwoods, including oak and sugar maple. Within the Lower Hudson Valley Region, a total of 38 invasive terrestrial and aquatic plant species have been identified as widespread threats to the local ecology (Lower Hudson PRISM).

There are some threats from invasive fauna in the Lower Hudson Valley Region as well. The widespread invasive invertebrate species include beech scale, spotted wing drosophila, brown marmorated stink bug, lily leaf beetle, European gypsy moth, viburnum leaf beetle, and pine shoot beetle. Widespread invasive vertebrate species include the mute swan and the common carp. (Lower Hudson PRISM)

Perhaps the most destructive threat to the ecosystem are the invasive pathogens within the Lower Hudson Valley Region. The widespread pathogens include chestnut blight, dogwood anthracnose, white-nose syndrome, beech bark disease, Dutch elm disease, and rhizosphaera needle cast disease. (Lower Hudson PRISM)

Opportunities

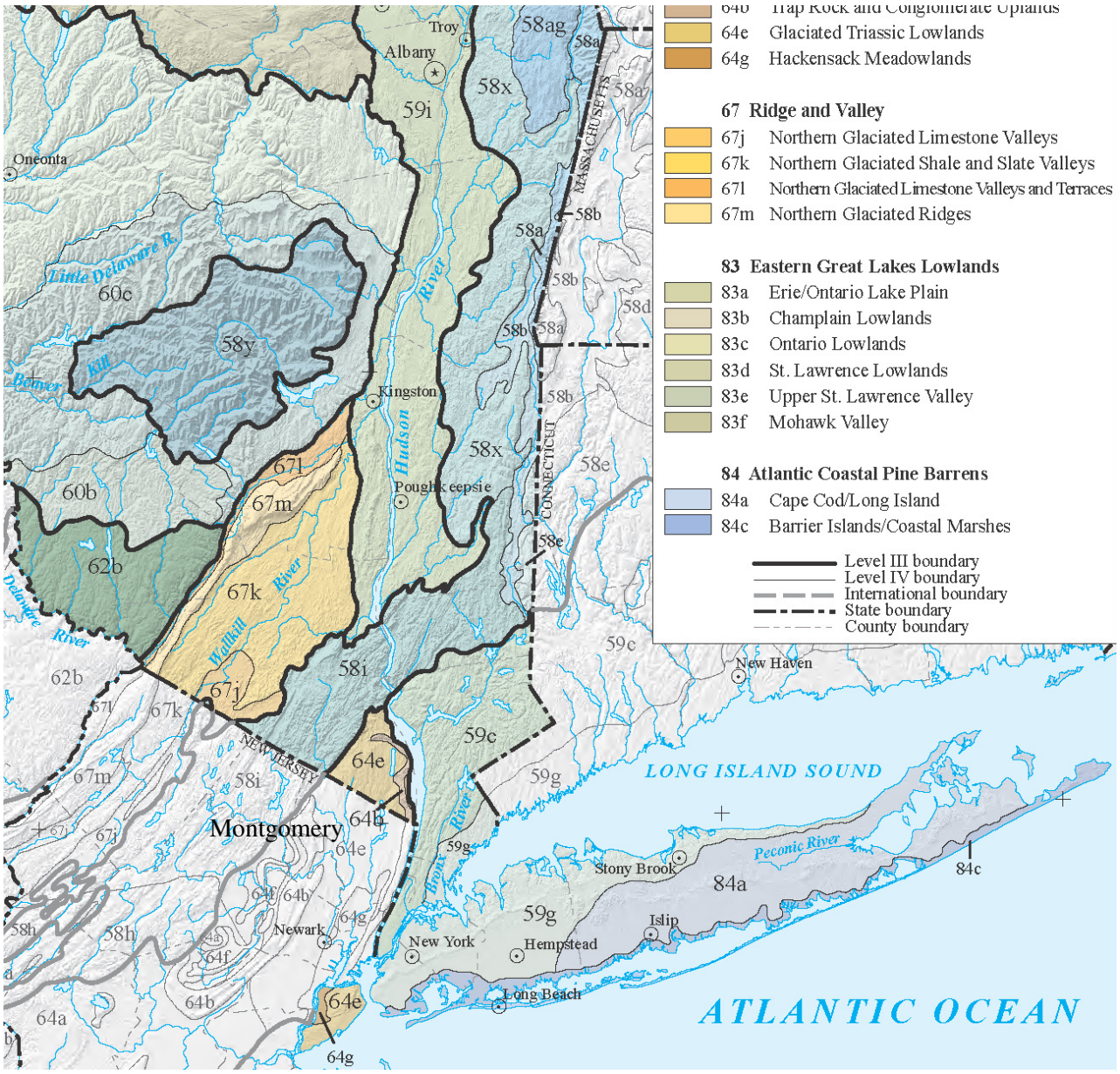
The majority of endangered and threatened species areas found within this Corridor can either be avoided or mitigated for most types of development. These species are terrestrial only, therefore, no affect to sensitive aquatic ecosystems would occur due to the development of this area. Certain uses are less impactful to wildlife than others, and those can be targeted for environmentally sensitive areas. Opportunities exist to balance development with conservation through the implementation of green technologies, the clustering of development, and the avoidance of vulnerable habitat.

Constraints

The Corridor includes habitat for the endangered Indian Bat and the threatened Northern Harrier, Upland Sandpiper, Sedge Wren, and Bald Eagle. Each of these species has the following development parameters to follow for impact avoidance and mitigation:

- For the mitigation of any negative impacts to the Northern Harrier population, all suitable habitat should remain intact. Of all the species within the Corridor, it requires the largest space demand and places the highest limitation on development.
- For the mitigation of any negative impacts to the Upland Sandpiper population, the preservation and maintenance of open grasslands has had the greatest positive affect. Mowing, plowing, and burning of fields should be avoided during the nesting season.
- For the mitigation of any negative impacts to the Sedge Wren population, wetland breeding habitat should be retained and maintained.
- For the mitigation of any negative impact to the Indian Bat population, all tree clearing will need to occur between November 1st and March 31st to avoid destroying any hibernacula.
- For the mitigation of any negative impacts to the Bald Eagle population, securing and protecting sufficient suitable habitat has had the greatest positive affect.

Figure 6: Ecoregions of NYS Map



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3.1.5 Historic and Archeological Resources

Existing Conditions

As the Corridor includes much of the primary historic transportation routes, there are many historic and archeological sites included on the National and/or State Register of Historic Places located throughout the study area. Those sites listed on the National Register have been deemed worthy of preservation. A listing alone does not preclude an owner from the use of their property (National Park Service).

The following National Historic and Archeological resources are found within or adjacent to the Route 17K Corridor (**Figure 6**):

1. Bodine's Tavern
2. African American Cemetery
3. Harrison Meeting House and Cemetery
4. Gideon Pelton Farm
5. Tweddle Farmstead
6. Johannes Miller House
7. Montgomery Worsted Mills
8. Nathaniel Hill Brick House
9. Milliken-Smith Farm
10. Benjamin Haines, Colden Family Cemetery
11. Brown Farmstead
12. Colden Mansion Ruins
13. John A. Crabtree, Peale's Barber Farm Mastodon Exhumation Site

The following is a list of eligible national and/or state historic properties within or adjacent to the Corridor:

1. Arnot-Haber House
2. Marwin-Mathieu House
3. Stone 18th c. Dwelling and Frame Barn

Opportunities

Recent practice has been to protect these sites from alteration and demolition, but not to completely disallow development. These properties present the character of the community of which it is striving to preserve, therefore, development should follow suit by incorporating historic resources into its fold and then emulating those resources.

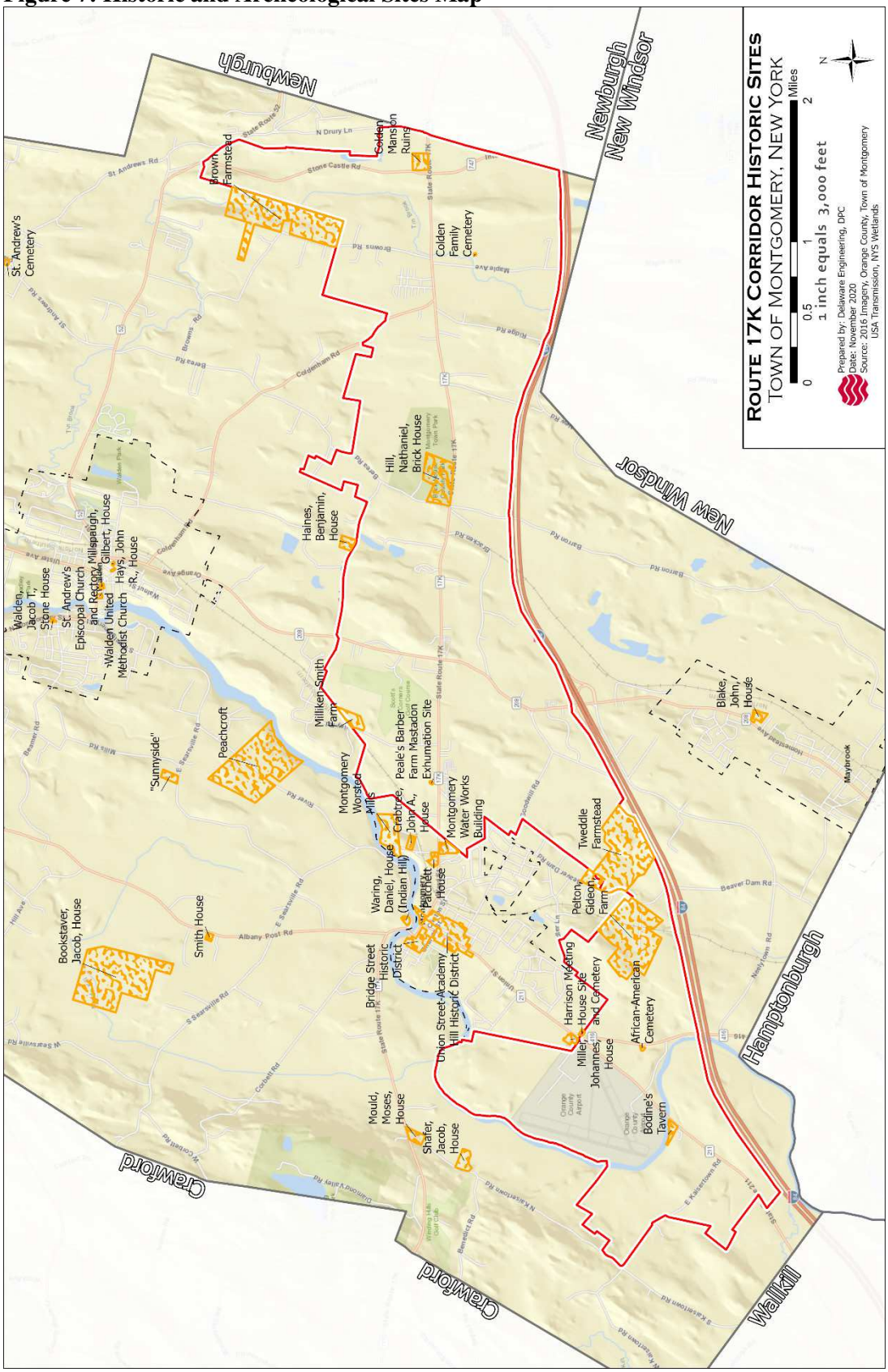
The opportunities that exist around historic and archeological resources are twofold: tourism and recreation. Tourism is usually derived from extremely important or extremely impressive sites or it is derived from an intact abundance of sites. Recreational opportunities exist through the preservation of these sites at the local level though colocation. As an example, the County Park incorporated recreation adjacent to the Farm Museum since it presented a symbiotic relationship opportunity.

A relationship can be created between a residential or commercial development and an existing historic resource, e.g., the Peale's Barber Farm Mastodon Exhumation Site. Recreational and educational elements can be generated in conjunction with the commercial and/or residential development of the site. Marketing and branding of the site would be the primary interrelationship. The site could be billed as Mastodon Square, with commercial development becoming the Commerce Center at Mastodon Square and residential development becoming the Villas/Estates at Mastodon Square. An approach such as this would increase the archeological resource's prominence along with the marketability of the commercial/residential development through the incorporation and preservation of the archeological feature.

Constraints

Development potential on any of the properties with historic or archeological resources may be limited or completely disallowed depending on protection and funding status from New York State or the Federal Government.

Figure 7: Historic and Archeological Sites Map



3.2 Infrastructure

- Water System
- Sewer System
- Transportation
- Power Availability
- Internet Connectivity

In order to facilitate responsible growth, a thorough understanding of the town's existing infrastructure is necessary. The availability of centralized water and sewer infrastructure, and the town's capacity to accommodate future growth and development, are key issues for the Economic Development Corridor Study.

3.2.1 Water System

The Town of Montgomery currently operates and maintains four (4) municipal water systems as summarized in **Table 2** below and shown on **Figure 1 - Water District Map** on the following page.

Table 2 – Existing Municipal Water Systems

Name	Water District #1	Lake Vue Park Water District	Hyndman Heights Water District	Water District 2B
Type	Potable + Fire Protection	Potable	Potable	Fire Protection
Provided by	Town of Montgomery	Town of Montgomery	Village of Montgomery	Town of Montgomery
Provided to	WD#1 Neelytown West WD Hawkins WD Hamptonburgh Outside Users	Lake Vue Park residential community	Hyndman Heights residential community	Bracken Road Office/Industrial Facilities
Permitted Capacity (GPD)	216,000	144,000	N/A	N/A
Average Production (GPD)	75,000	10,000	1,300	N/A
Population Served	1,500	200	50	N/A
Service Connections	60	49	14	12
LF of Main	37,000	2,600	1,200	5,700

Water District #1

This is a conventional water system that provides potable domestic water as well as fire suppression through elevated storage to three (3) special districts: Hawkins WD, Neelytown West WD and itself. The primary area of service is the entire Neelytown Road industrial corridor; the principal retail corridor along Hawkins Drive, and the Morrison Heights community along NYS Route 208. This system also provides water to a portion of the Hudson Crossing Corporate Park within the neighboring Town of Hamptonburgh.

Opportunities:

Production and storage are provided by two (2) groundwater wells rated at 225 and 200 GPM, and a single elevated storage tank of 323,000 gallons. The system is permitted to treat 216,000 GPD, and water treatment consists of disinfection with liquid chlorine injection at the wells. The district originally purchased water from the neighboring Village of Maybrook, and that connection remains as an emergency source.

Constraints:

The system is served by two wells that are located in the same well field and are affected by high chloride concentrations due to geology and from road salt application on Interstate 84. Elevated chloride levels in drinking water is primarily an aesthetic concern, but it can increase corrosion that may affect lead levels in the distribution system.

The system is dependent on a single storage tank, which leaves the town vulnerable in an emergency that would require removal of this sole tank from operation. In 2019, a leak developed on the tank, but it was high enough that operational pressure was not adversely affected when water level was lowered to make the repair.

Lake Vue Park Water District

This system serves the Lake Vue Park residential development with potable water, but with no fire protection capabilities. The system serves approximately 200 residents via a single 200-foot groundwater well that produces 100 gallons of water per minute (GPM). The water distribution system consists of 2,600 linear feet of asbestos concrete water main that is 60 years old, but still in good condition.

Prior to distribution, the water is disinfected with liquid chlorine. As with many other water systems in the region, the chlorine reacts with manganese, a mineral deposited naturally in the water table. The chlorine causes the manganese to oxidize, coagulate and settle in the distribution pipes, thereby discoloring the water. To help address this issue, polyphosphate is added to the water prior to the chlorine injection in an attempt to sequester the manganese from oxidizing.

Opportunities

This water system is very limited in its ability as a standalone system to support additional customers; however, it could contribute rate payers in a consolidation scenario that would assist in supporting the costs of expanding the Town's water systems.

Constraints

The treatment system is 60 years old and deteriorating in a corrosive environment due to high humidity. Many elements of the system have exceeded their useful lives, and everything within the treatment process should be replaced, including the electric service, controls, well pump and pressure tank.

A larger building is needed to accommodate these improvements, but there is no further room within the existing well house to accommodate such.

Unlike systems with elevated tanks that use gravity for pressure, Lake Vue Park is dependent on continuous electricity to not only pump water from the well, but also to provide pressure via booster pumps that cycle throughout the day. The electric service also suffers from the corrosive effects of humidity, and there is no auxiliary generator to provide back-up power.

Concentration levels of manganese in the groundwater are often high enough that the polyphosphate sequestering measures in use since 1996 do little to improve aesthetic quality.

DOH has consistently noted the need for an additional well, for which there is no site within practical distance of the system to explore for one.

The water district is composed of only 49 customers, who bear the sole financial burden of the system and any future capital improvements.

Hyndman Heights Water District

This is a potable distribution system with no fire protection capabilities serving the Hyndman Heights residential community. This system has only 14 customers and purchases finished, treated water from the Village of Montgomery. It was established in the early 1960s and supplies the water through the original 2-inch steel water main along the shoulder of NYS Route 17K.

Opportunities:

The existing connection to the Village of Montgomery as a supply of water is a potential opportunity for expanded service in this area of the Corridor.

Constraints:

The distribution system is 60 years old, the 2" steel pipes are undersized, and the condition is questionable.

The water district is composed of only 14 customers, who bear the sole financial burden of the system and any future capital improvements.

Water Improvement District 2B

This system strictly provides fire protection to industrial facilities and office buildings along Bracken Road. The water source is an untreated pond. For potable water, all of the facilities and buildings within this district have private wells, many of which are regulated by the Department of Health (DOH) as non-community systems, but must still comply with the operational and testing standards of a municipal system.

Opportunities

With a potable supply and new services connections, the distribution infrastructure in this district could be converted to a combined potable and fire protection source to enhance development opportunities in the aera.

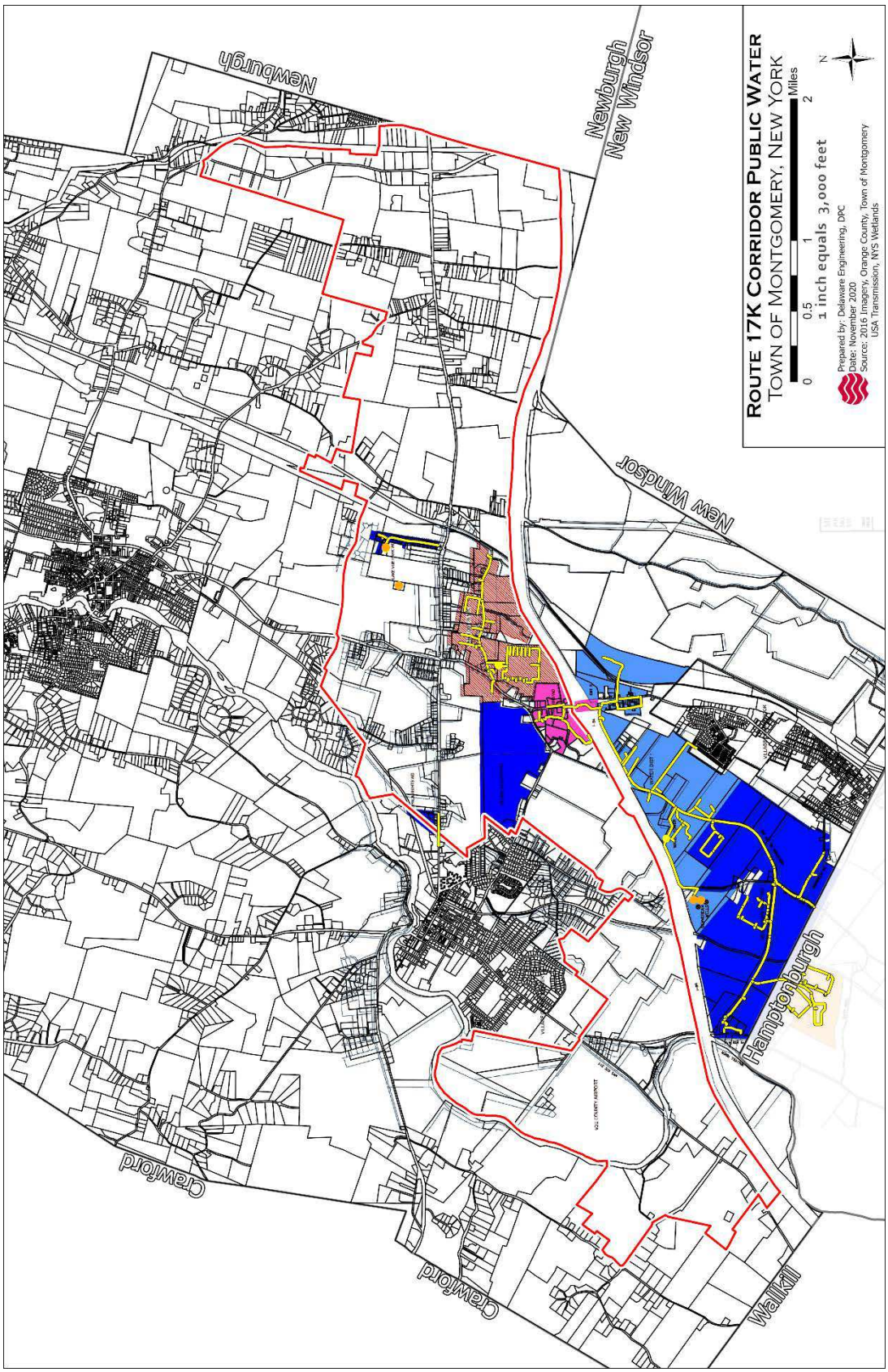
Constraints

Operation is dependent on 35-year-old diesel engine driven pumps that are not designed to run for more than 24 hours, and antiquated relay controls.

Leaks are a concern with the exceptionally high operational pressure, which increases the risk that jockey pumps cannot sustain pressure and the larger, engine driven pumps will have to compensate.

Operation of this system can be labor insensitive. While the system is designed to start automatically, it must be reset manually following investigation into the cause of water use. This often occurs after normal business hours.

Figure 8: Water Distribution System Map



Village Water Systems

Each of the three incorporated villages within the Town, Maybrook, Montgomery, and Walden, owns and operates a public water system which may present opportunities for shared services and the extension of potable water into the Town.

- **Village of Maybrook**
  The Village of Maybrook is supplied by groundwater wells both within its corporate limits and outside of its boundaries in the Town of Hamptonburgh. Montgomery's WD#1 originally purchased its water from the Village of Maybrook, and that original connection remains as an emergency connection. Recent extensions to WD#1 have provided two additional, potential interconnections with the town's water system at opposite ends of the Village system.

- **Village of Montgomery**
  The Village of Montgomery is also supplied by groundwater wells both within its corporate limits and outside of its boundaries, but is heavily dependent on its Holt wells, which are located in the Town. The Town's Hyndman Heights Water District currently purchases water from the Village of Montgomery. The Village of Montgomery operates near its system capacity and has faced critical stages when just one of the Holt well pumps have failed. A future extension of the town system along NYS Route 17K and NYS Route 211 could provide potential interconnections at opposite ends of the Village, to supplement its water system if needed.

- **Village of Walden**
  The Village of Walden is supplied by two groundwater well fields that are both outside the village limits in the Town of Montgomery. A small water district also exists on the outskirts of Walden (High Meadows WD) which currently serves about 12 town residents who purchase water from the Village of Walden. The Village of Walden owns and maintains all infrastructure in High Meadows WD.

Opportunities for District Expansion

There are a few key opportunities for water district expansion that have been proposed and discussed with town officials over the past several years. These areas are shown in **Table 3**.

- **Vistamore**
  An additional water district exists that will encompass Vistamore, a planned adult community that was approved by the town in 2008. This project has NYSDOH approval for its own water system that included development of three (3) wells and a 400,000-gallon storage tank. The intent, as stipulated in an executed Development Agreement, was for the town to accept dedication of this water system upon interconnection with the town system. Vistamore was approved at a time when town water did not exist near its site, but since the approval, Town Water District #1 has been expanded via the establishment of the Hawkins WD, thereby providing the development project with immediate access to municipal water. However, it is uncertain when that system will commence with construction.

- **Scotts Corners – Secondary Well and Water Tank**
  Due to the elevated chloride concerns at the existing Beaverdam well field, the Town sited a well at the opposite end of the commercial/industrial corridor in the vicinity of Scotts Corners and subsequently purchased the minimum control radius around it. This well (Bruderhoff Well), while not yet completely developed or permitted, has demonstrated a safe yield of 125 GPM. There is also high ground elevation in close proximity to this well on which an additional water tank can be built that would match the operational levels of the Town's sole existing tank. However, it is important to note that there is a "reverter clause" in the deed to the well property, whereby the original owner may take back title to the property if the Town doesn't not make intended use of it. The terms of the deed were extended to currently expire in 2021.

  If a new well and water tank were constructed in the Scotts Corners area, it would not only provide a secondary water supply in the case of an emergency, but would also facilitate expansion of WD#1. An expansion of the water district would provide centralized water to existing development along the Route 17K corridor that currently rely on private wells. It could also provide water to the Lake Vue Park residential community, and offer an alternative to upgrading the Lake Vue water system.

- **Orange County Airport**
  The Orange County Airport is located in the Town of Montgomery, approximately one mile southwest of the Village of Montgomery. It is owned and operated by Orange County. Fulfillment of development plans for the airport is dependent on the provision of centralized water and sewer services via the Town of Montgomery. Depending on demand, this could be accomplished via an extension of the Neelytown West Water District, which was recently expanded to include the Medline development, located less than a half mile from the airport's property line. Alternatively, the Airport is in close proximity to the Village of Montgomery and if additional water resources are developed by the Village, extension of water service to the Airport may be possible.

- **Catskill Aqueduct**
  The Catskill Aqueduct is a part of the New York City Water Supply system that traverses the eastern edge of the Town of Montgomery, near its border with the neighboring Town of Newburgh. The Town of Montgomery has the option to tap into this system for drinking water, which would require the creation of a new water district and a water purchase agreement with the NYC Department of Environmental Protection (DEP). The maximum withdrawal allowed by statute is equivalent to the NYC per capita consumption. This value is based on the Towns residential population updated with each decennial census multiplied by approximately 110 gallons per person per day. Based on the 2010 Census (soon to be outdated by the 2020 Census), the Town may be able to access 2,486,660 gpd (22,606 pop x 110 gpdpc).

  NYCDEP manages the water supply and typically requires backup supply plans and water conservation plans that demonstrate efficient use of water resources and ability to sustain periodic aqueduct shutdowns.

Current & Future Water Capacity

The current capacity of Water District #1 is 216,000 GPD, and the most recent annual average daily production was 75,000. Therefore, the district is currently operating at 35% capacity, resulting in 65% excess capacity. Table 3 below lists the cumulative progression of total system capacity when and if additional wells go online in the future.

Table 3 – Current & Future Water Capacity

Well Source	Status	Safe Yield (Gpm)	Cumulative Permitted Yield (Gpd) [1]
WD1 - Well #1	developed and operational	200	216,000[2]
WD1 - Well #2	developed and operational	225	216,000[2]
Bruderhoff Well	undeveloped	100	381,600
Lake Vue Well	developed; needs rehab & treatment	100	525,600
Vistamore PW1	undeveloped	50	597,600
Vistamore PW2	undeveloped	50	669,600
Vistamore PW3	undeveloped	76	779,040

Notes:

1. With highest producing well out of service per DOH regulations (18-hr per day limit)

In summary, by developing the Bruderhoff Well, capacity could potentially increase to 381,600 GPD. Additional future capacity could be provided with the rehabilitation of the current Lake Vue Park well and/or the dedication of the three private wells associated with the Vistamore development to the Town, per the development agreement.

3.2.2 SEWER (WASTEWATER) SYSTEM

The Town of Montgomery currently has two sewage collection service areas, Sewer District 1 (SD1) and Sewer District 2 (SD2). These districts are shown on **Figure 3 – Sewer District Map** on the following page. These special assessment districts fund all capital improvements, operations and maintenance of the sewer systems serving it. There is also the Baxter Sewer District that strictly serves the Cardinal healthcare facility, and three industrial facilities served in the Town of Hamptonburgh.

Wastewater Treatment Plant

SD2, Baxter SD and the Hamptonburgh facilities convey its sewage to SD1 for treatment at a NYSDEC permitted wastewater treatment plant (WWTP) located at the intersection of Neelytown Road (County Route 99) and NYS Route 416. The existing facility is permitted by NYSDEC to treat 147,500 gallons per day (GPD) of sanitary sewage.

Currently, the treatment process is a rotating biological contactor (RBC) with primary and secondary clarification. Prior to discharge to the Wallkill River, the treated effluent is disinfected with chlorine, dechlorinated with sodium thiosulfate, then aerated via step aeration to increase dissolved oxygen that was consumed during de-chlorination. Sludge is processed in an aerated sludge holding tank that is removed both via liquid sludge hauling directly from the aeration tank and, in warmer months, applied to sludge drying beds where dried sludge is hauled away.

- **Opportunities**

  The presence of a public sewer system has facilitated a degree of commercial growth in the Corridor Study area.

- **Constraints**

  High concentrations of hydrogen sulfide. Hydrogen sulfide (H2S) is generated from the absence of free oxygen in the waste stream and in this system, primarily originates from the long detention times while in the septic tanks of SD2. It further increases while being conveyed thru the final 13,000 feet of force main along Neelytown Road to the WWTP. Symptoms of H2S are strong, repulsive odors and promotion of poor growth to ultimately treat the wastewater.

  High concentrations of phosphorus. Due primarily to a single, significant industrial user in the system, influent phosphorus levels are atypically high at the treatment plant. Phosphorus promotes biological growth and affects the Town facility by generating an unusually large volume of sludge for a plant of its size. Even with phosphorus being consumed through excess sludge production, a significant amount leaves the plant with its effluent. Phosphorus is of concern to receiving waters as it promotes eutrophication.

  Future Designation of the Wallkill River as an Impaired Waterway. In 2018, the NYSDEC listed the Wallkill River and several of its tributaries on a draft version of its “impaired waters” list, under section 303(d) of the Clean Water Act. New limits on total phosphorus (TP) and dissolved oxygen (DO) will be imposed on all wastewater treatment facilities along the Wallkill River.

Collection System

There are approximately nine (9) miles of collection system consisting of small diameter gravity and pressure sewers. Of this roughly 60% is sized specifically to serve septic tank effluent from SD2 that has hastened system deterioration to the degree that it appears to have reached the end of its useful life.

At least half of the current total flow is effluent from septic tanks. A problem inherent with septic tank effluent is its highly corrosive nature due to the generation of hydrogen sulfide gas (H2S) resulting from extended detention time of the wastewater in the absence of free oxygen. H2S gas is very destructive to concrete and steel that make up many components of a sanitary collection system. It is also highly odorous. Over time the corrosive sewer gases have caused extensive deterioration and damage to the collection pipes, manholes, pumping station, and the WWTP itself. In addition, the sewer district is responsible for routine and emergency maintenance of these septic tanks.

- **Opportunities**

  The presence of a public sewer system has facilitated a degree of commercial growth in the Corridor Study area.

- **Constraints**

  A major limitation of the collection system is the very small diameter sewer mains, that were originally sized that way because solids are retained in septic tanks and not conveyed through the system. These mains are mostly less than 8 (eight) inches in diameter, which prohibit the transport of solids and limit practical expansion.

  The primary gravity trunk line of SD2 is of minimal diameter and less than minimal slope to convey conventional raw sewage. The shallow slope was originally permitted in the early 1980's due to the fact that the system was designed to accept settled effluent from septic tanks with no solids or screenings to carry. This prohibits removal of any septic tanks until sufficiently designed collection mains are installed. Complicating matters further is that sags have been documented along the larger mains, restricting flow even more within those segments.

  The gravity collection system within SD1, while originally designed to accommodate conventional raw sewage, is also of minimum size and slope. Video inspections of these runs have also identified sags along numerous segments that further limit flow. Of most critical concern however is the pipe's concrete material that has deteriorated severely from H2S corrosion. Enough so that there are serious structural concerns.

Pump Stations

While gravity conveyance of sewage is generally preferred where cost effective to construct because of low operating costs, due to the undulating terrain within the town and the linear nature of the town's collection system, several pump stations are needed to convey the sewage to the treatment plant. The town currently owns and operates four pump stations, namely Morrison Heights PS, 17K PS and Lake Vue PS located within SD2, and the Truckstop PS located in SD1.

These pump stations are in series and function dynamically, in that discharge from Lake Vue PS ultimately flows to 17K PS, which ultimately flows to Morrison Heights PS, which ultimately flows to Truckstop PS. Therefore, any capacity upgrade to a pump station must be done following evaluation of all downstream pump stations that will also receive that flow.

- **Opportunities**

  The presence of a public sewer system has facilitated a degree of commercial growth in the Corridor Study area.

- **Constraints**

  Individual pump systems: The extent of the force mains that follow many of the town pump stations imposes capacity restrictions and requires customers along the force main to connect via their own pump system in order to be provided with sanitary service. These individual pump systems increase peak flow that further restrict capacity of the Town's upstream pump stations. In addition, because the Town is still responsible for maintenance up to and including the septic tanks within SD2, it also assumes maintenance of individual pump systems that might follow some tanks. While commercial facilities have maintained their own pump systems, the Town maintains 9 (nine) residential pump systems on private property.

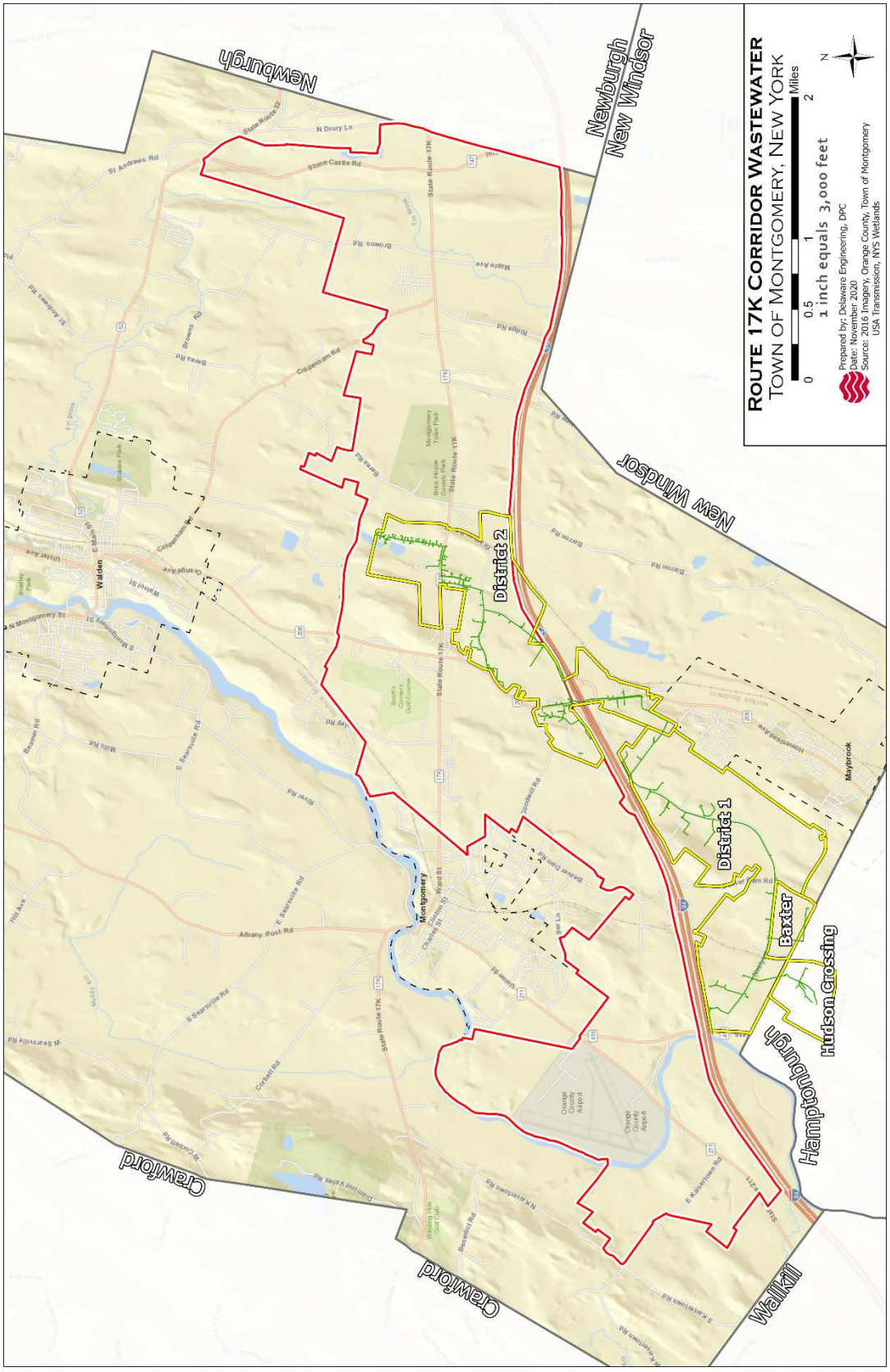
  Additional Town Pump Station Needed: The Truckstop Pump Station (TSPS) is currently the final pump station in the series. It collects all flow from SD2 and a considerable amount from SD1, and then pumps it 13,000 feet through a small diameter force main to the WWTP. Along the way there are 12 private customer pump systems with the potential for at least 6 (six) additional pump systems that provide a surcharge to the system. The surcharges restrict the flow rate of the TSPS, affecting accommodation of peak flows, which are further exacerbated by infiltration upstream due to corroded pipes. To handle these peak flows, an additional pump station along Neelytown Road was approved by NYSDEC in 2012, but I/I improvements were made, additional flows from projects did not substantially develop, and the pump station was never built.

Village Treatment Plants

Each of the three villages has its own permitted wastewater treatment facility that strictly serve customers within the respective villages. These facilities vary in terms of available capacity.

For purposes of the Corridor Study, it is noted that the Village of Montgomery WWTP has no excess capacity, while the Village of Maybrook was upgraded and has some excess capacity, which may present an opportunity for shared services with the Town.

Figure 9: Wastewater Collection System Map



Current & Future Sewer Capacity

The existing town facility is permitted by NYSDEC to treat 147,500 gallons per day (GPD) of sanitary sewage. With a current 12-month running average daily flow just under 120,000 GPD, the sewer plant is currently operating at over 80% of its permitted capacity.

While the Neelytown Road WWTP could be expanded, the existing collection system is limited in terms of flows that can be delivered to the WWTP to essentially the existing permitted capacity. As a result, if the existing WWTP is expanded, a new collection system is required to convey additional wastewater flows. Additionally, the WWTP site is very small and will limit the size of any expansion. Lastly, the location of the WWTP relative to potential new demands for sewer services does not favor additional investment on the site. Opportunities to share services with other public sewer systems and to site infrastructure nearer to demands is being explored.

3.2.3 Transportation

The Town of Montgomery has been at the crossroads of transportation since its inception. Its mix of interstate, state, county, and local highways, along with its access to two airports and two active freight rail spurs, have created a highly attractive commercial and industrial landscape.

The Route 17K Corridor is positioned to take advantage of each of these transportation assets. The most desirable advantage of this infrastructure is its existing and potential for interconnection; where each benefit the others logistically. This area has been recognized by developers due to its attractive location for transportation.

Roadways

The Route 17K Corridor Study Area contains a total of 32.53 miles of state, county, town, and private highways and roads. The Corridor also runs for 7.77 miles along the north side of Interstate 83. This accounts for nearly the highway's entire length within the Town of Montgomery. The Study Area is directly served by Exit 5 from Interstate 83; it has additional access through the Town of Newburgh from Exit 6 via NYS 17K and Exit 5A via International Boulevard.

The NYS Highways within the Corridor include 4.99 miles of NYS 17K, 1.69 miles of NYS 211, 0.85 miles of NYS 416, 1.78 miles of NYS 208, and 0.54 miles of NYS 474. The only County Highway is 0.47 miles of Coldenham Road. Town-owned roads account for a total of 20.5 miles of roadway within the study area, while the remaining 1.72 miles are various types of private streets.

Airports

The main entrance to Stewart International Airport is less than two miles south from the Corridor boundary with the Town of Newburgh. A medium sized commercial passenger and cargo airport, with a 2.3-mile primary runway and 1.2-mile secondary runway. This proximity to an expanding airport with international destinations is a major asset to the economic stability of this area and the County as a whole. Stewart also has a robust commerce sector surrounding it that could be a springboard for additional economic investment. Additionally, businesses engaged in import/export can take advantage of Foreign Trade Zone # 47, located at the Airport.

Just over six miles to the west and within the Route 17K Corridor study area exists the Orange County Airport. This airport is relatively underutilized but holds considerable potential for increased intermodal commerce. It sits to the west of the Village of Montgomery and to the north, south, and east of the Wallkill River. Exit 5 on I-84 is just over 4 miles to the east and the airport is accessible from both NYS Route 211 and NYS Route 416. There is currently a plan in place to expand the primary runway since it measures at just 0.95 miles; its secondary runway measures in at 0.75 miles.

Railroads

There are two railroad lines owned by Middletown and New Jersey Railroad, LLC located within the Town of Montgomery and both travel into the Corridor Study Area. The Walden Secondary Line branches off of the primary Norfolk Southern Railroad line in the Town of Hamptonburgh and travels 6.25 miles through the Town, through the Village of Montgomery, and terminating in Walden. The other railroad is the Maybrook IT line which branches off of the Walden Secondary Line in Hamptonburgh, travels 4.45 miles through Maybrook and the Town, and then terminating at the Staples Distribution Center. This line also services several other businesses along Bracken Road, including CTS Pavers, Russin Lumber Corporation, and Laser Ship.

The land along the railroad corridors is highly attractive and continues to be developed at a steady pace within the Town of Montgomery. There exists only a handful of undeveloped lands within the Route 17K Corridor that possess direct rail access. The businesses that desire to locate along the rail line are those with major multi-modal distribution interests which directly ties into the convenient interstate and airport access which the Corridor offers.

3.2.4 Power Availability

There is a single primary electrical transmission corridor for the Route 17K Corridor managed and owned by Central Hudson Gas and Electric. There are 10.6 miles of electrical transmission corridor within the Town of Montgomery, with 36 miles of transmission lines. Inside the Study Area, there is a total of approximately 7.34 miles of electrical transmission lines, not including the additional service lines on every street with the Corridor. The two major substations are Roseton in the Town of Newburgh, laying eight miles to the east of the Town boundary, and Rock Tavern in the Town of New Windsor, laying approximately two miles south of the Town boundary.

There is a single line that travels through the entire town from Roseton to Rock Tavern with a capacity of 345 kilovolts. There are also two 115 kilovolt lines running between Rock Tavern Substation and Substation 129097 in Walden. One of the lines runs directly between the two stations, while the other travels an additional 2.12 miles to and from the battery storage facility on Colonel Foster Drive. This battery facility provides a backup power supply to support times of limitation within the renewable energy production systems.

In the north of Town, near Walden, three solar energy production arrays have been constructed. Additionally, a solar array on Maple Avenue in the vicinity of the Amazon logistics center has been approved but not yet constructed. These types of systems help to create a stronger, more secure energy future for the Route 17K Corridor. It should be the goal of all communities to incorporate alternative energy facilities as a part of their economic development strategy. Improving and diversifying this Corridor means investing in a wide variety of industries and housing types, all of which demand increased energy production. Therefore, an expansion of energy production, along with an increased in the variety of energy producing technologies, will be required to meet that need.

3.2.5 Internet Connectivity

Throughout the 17K Corridor, the availability of internet and wireless communication is practically universal. Frontier Communications and Charter Communications are the dominant providers within the study area, while Verizon Communications provides coverage for the extreme eastern portion of the Town, including all of the parcels along Stone Castle Road and International Boulevard. Charter Communication Inc and Verizon Wireless provide high-speed cable modem service and/or fiber optic with 940 megabits per second download speed throughout the Corridor.

Frontier Communications provides high-speed ADSL with up to 115 megabits per second download speed for the more densely populated areas of the Town and extensions are possible. While the high-speed lines are available, the extension to new large developments will cost around $100,000 according to Frontier Communications. Services would then need to be provided throughout the development depending on size, variety of use, and number of buildings.

There are also satellite providers of broadband available throughout the majority of the Corridor, including ViaSat Inc, Hughes Network Systems, and VSAT Systems LLC. These providers all have far lower download speeds than the cable providers.

With the number of options available for broadband internet access throughout the study area, no development should be hindered by lack of speed or availability. This economic area is well positioned to provide for the needs of a modern technological workforce.

3.3 Open Space and Recreation

Table 4 below lists the existing publicly owned properties with under-utilized land as well as all properties currently used for recreational purposes. The Town of Montgomery currently owns 157.41 acres of land across 13 parcels, while Orange County currently owns 743.09 acres on 19 parcels.

	Table 4 – Publicly Owned and Recreational Lands		
	Name	**Ownership**	**Acreage**
OPEN SPACE	Brick House Museum County Park	Town of Montgomery	121.34
	Benedict Farm Park (adjacent)	Town of Montgomery	102.67
	Stewart State Forest (adjacent)	State-owned Preserve	1,022.04
	NYCDEP Water Right-of-Way	City of New York	44.49
RECREATIONAL	Brick House/Orange County Farmers Museum	Orange County	37.08
	Scott's Corners Golf Course	Private	98
	Hummingbirds Baseball Camp	Private	6.98
	Acquired Railroad Right-of-Way	Town of Montgomery	8.37
	Verbank Hunt/Fish Club	Private	31.38
OTHE	Orange County Airport	Orange County	566.24
	Route 17K and Barron Road	Orange County	139.77

Opportunities

The opportunities associated with open space and recreation resource are numerous. Primarily, however, the interconnection of these resources between the residential, commercial, and community land uses will provide the greatest opportunity for the utilization and preservation of these properties.

The Town Board has an established policy to require parkland or fees in lieu of parkland from developers of residential subdivisions and site plans for multiple residence projects such as assisted living facilities.

Privately owned open space is also an opportunity for the community. These areas can be acquired for public recreation and preservation. The majority of these lands are constrained for development due to the presence of substantial wetlands, its location within the flood hazard zone, or isolation from a major roadway.

Constraints

The only constraints associated with open space and recreation resources are the costs of development, maintenance, and enhancement. Any property utilized for public purpose requires the support of the residential and business community to be sustainable into the future.

3.4 Zoning & Comprehensive Plans

3.4.1 Existing Zoning Code Summary

The current zoning code was adopted in 2007 for the purpose of promoting the health, safety, morals, and general welfare of the community. The zoning code has become cumbersome to use since it has numerous cross references that have not been highly organized within Town Code. The code is highly prescriptive in its design of the individual zoning districts. It represents the traditional Euclidean model of zoning where allowed uses are completely separated from one another. While this type of zoning was popular to deal with the isolation of residential development from heavy industrial development, in many cases is goes too far in dividing up the landscape and can perpetuate the inefficient use of land. This inefficiency can in turn create greater waste in public infrastructure spending, such as the extension of water and sewer facilities.

Table 5 – Corridor

Zone	Description	Acres	Perce
B1	Neighborhood Business	2	0.03%
B4	Highway Commercial	410	6.2%
I1	Industrial Park	2,120	32.3%
I2	Industrial Park Major	322	4.9%
I3	General Industry	417	6.4%
IB	Interchange Business	253	3.9%
OB	Office/Business	394	6.0%
OP	Office Park	42	0.6%
RA1	Residential Agricultural 1	21	0.3%
RA2	Residential Agricultural 2	1,018	15.5%
RA3	Residential Agricultural 3	745	11.3%
RA0.5	Residential Agricultural 0.5	532	8.1%
RACE	RA Conservation	153	2.3%
RM1	Multi Family	67	1.0%
RMHC	Mobile Home Court	27	0.4%
	Total	6,566	100.0%

There are a total of 23 zoning districts made up of 18 base districts and 5 overlay districts. Fourteen of the districts are included within the use table, while 16 are included within the dimensional table. Districts I-1 and I-1 have been combined in the tables but are shown as separate districts on the zoning map. Districts R-1 and R-3 have been left off the use table as they only differ in their dimensions to the R-2 district and not their use. Two of the base layers are not included within the codes use or dimensional tables, but rather have been incorporated separately as special districts to regulate Biomass Gasification-to-Energy Use and Mining. The overlay districts include two airport districts for the Stewart International and Orange County, one gateway district along Route 17K for increased design standards, one water supply protection district, and one Planned Adult Community district that is a part of the R-2 and R-3 districts. The breakout of the current zoning within the Corridor study area is provided below in Table 4.

The majority of the Town's land is within the RA-0.5 Residential Agricultural District. This district is not substantially represented on the Route 17K Corridor Study Area; it is only present within undeveloped parcels adjacent to the airport. RA-0.5 is Montgomery's single-family residential district and only allows certain non-residential/agricultural uses through the approval of a special exception permit. A special exception permit is a zoning tool that allows for greater municipal control over types of development that are not allowed as a right, but may be permitted within the zone under certain conditions. The Planning Board is allowed to apply conditions onto these uses in order to best harmonize the use into the district.

There are a total of 128 individual use categories that are either permitted, permitted through special exception, permitted as accessory or disallowed within each district. Of these districts, it is only within the Residential Agricultural areas that any form of mixed-use development is allowed, and the mix is limited to

just agricultural related businesses and other home businesses as secondary uses to single-family or two-family residential.

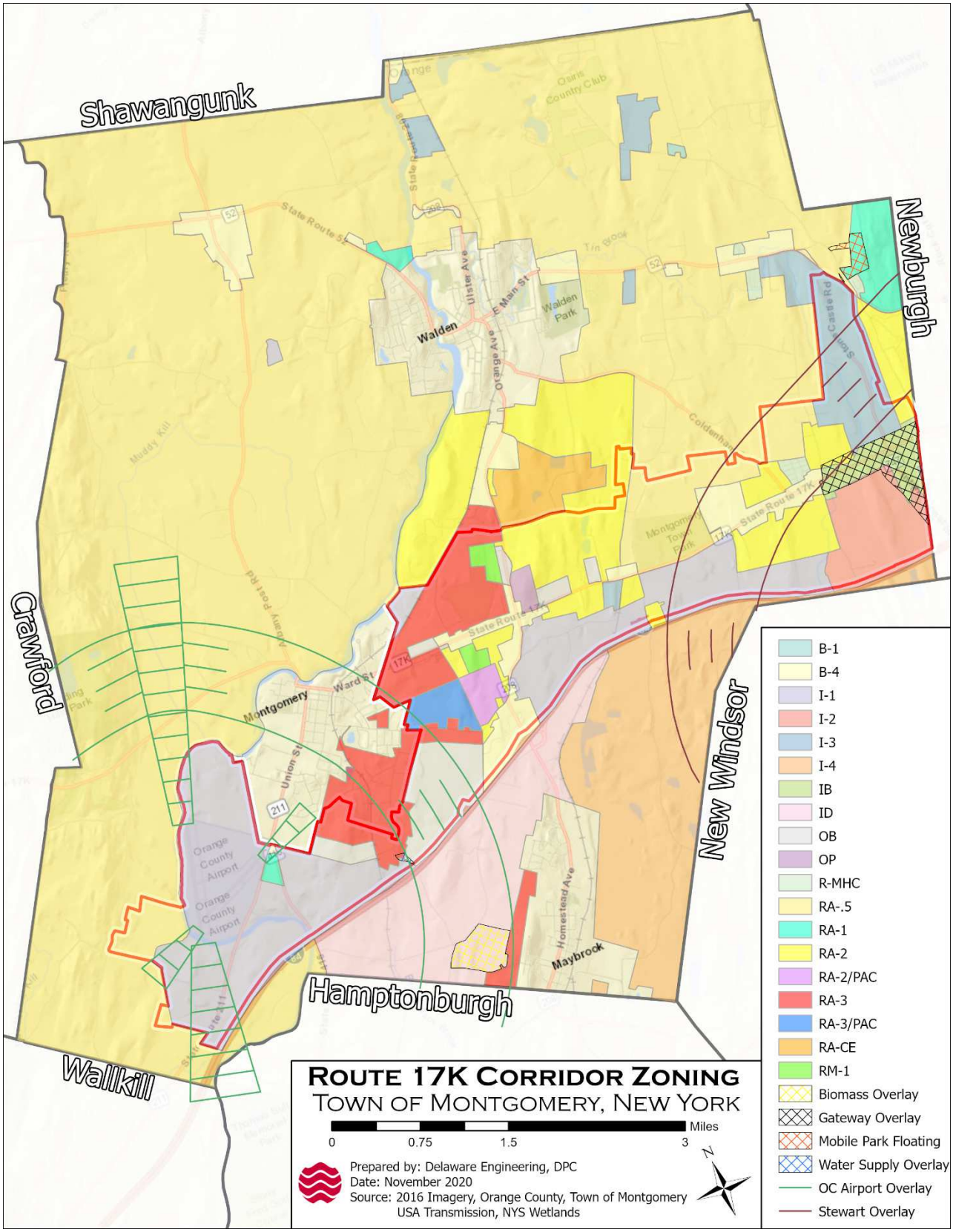
The Route 17K Corridor Study Area encompasses the majority of the commercial and industrial zoning districts within the Town Montgomery. When looking at the current zoning within the Corridor, the fragmentation of most of the districts is readily apparent. There also exists noticeable spot zoning inside the Study Area as well as throughout the whole Town. Spot zoning is the selective zoning of a single parcel that is not contiguous to other portions of the district in order to allow for a use in an area it is otherwise not permitted. Beyond spot zoning, there are some districts that are only found within a single part of Town, under single ownership. This suggests that the zoning code has been reactively created to reflect what already exists or was going to be developed.

The most effective land use codes have fewer zones and fewer uses as well as more cohesive and contiguous application than the Town of Montgomery code. Given the land base of the Town and community input, the number of zones and uses in the present code is excessive. In considering zoning, a municipality should not lose sight of the objectives that were the enumerated purposes for the adoption of the zoning code:

- To guide and regulate the orderly growth, development and redevelopment of the municipality in accordance with a comprehensive plan and with long-term objectives, principles and standards deemed beneficial to the interests and welfare of the people.
- To protect the established character and the social and economic well-being of both private and public property.
- To promote, in the public interest, the utilization of land for the purposes for which it is most appropriate.
- To secure safety from fire, panic, and other dangers, and to provide adequate light, air and convenient access.
- To prevent overcrowding of land or buildings, and to avoid undue concentration of population.
- To lessen and, where possible, to prevent traffic congestion on public streets and highways.
- To gradually eliminate nonconforming uses.
- To conserve the value of buildings and to enhance the value of land throughout the municipality.

In many cases, the current zoning is in direct opposition to these objectives, particularly along the Route 17K Corridor. When looking at the land use throughout the corridor, it is somewhat disorderly and does not always protect the social and economic well-being of private and public property. While there are zones for large scale commercial and industrial operations, they tend to border up against or even surround residential zones. The land use also does not always enhance the value of property either; especially when that property is broken up between multiple zoning districts. The land use pattern also shows that there is a general lack of coordination between the Town's zoning and the zoning for the three villages.

Figure 10: Montgomery Zoning Map with Corridor



3.4.2 Comprehensive Plan Summary

The Town of Montgomery's current Comprehensive Plan was originally adopted in 1988 and amended in 2010; the Town will be adopting a new comprehensive plan in 2021.

The 1988 plan's primary objective was to guide growth "in such a manner as to reinforce the viability of the existing village centers". Higher density zoning was to be targeted along the Route 208 and 17K corridors between the villages in order to centralize services.

A second major objective is that development be coordinated with development of sewer districts and discourage small, isolated plants that would encourage sprawl. It goes so far as to suggest that the Town consider joining a regional sewer district as well as a regional water supply system. The plan also highlights the Wallkill River as an asset not only as an open space corridor, but also as a buffer to development and location for sewer treatment plants.

Most importantly, for the Route 17K Corridor Study, the plan states the Town is a primary location for industrial development in Orange County due to its proximity to major transportation infrastructure and surrounding communities with shopping, higher education facilities, and parks, but without Montgomery's supply of land. The plan highlights the need to locate commercial and industrial development in areas with access to major transportation arteries of I-84, Route 208, the railroad, and the airports. It recommends additional industrial areas along I-84 and Route 17K.

The Comprehensive Plan states that the Town has an issue with incompatible land uses and spot zoning. The Comprehensive Plan both recognized this in 1988 and recommended that "conflicting land uses should be prevented by the elimination of spot zoning and by the provision of smoot hand logical transition from one land use to another."

The Town is currently engaged in updating the Comprehensive Plan. This study, which includes recommendations regarding land use and zoning, will be forwarded to the Town Board for consideration for inclusion in the updated Comprehensive Plan.

4.0 MARKET STUDY

To conduct the Market Study, the consultant team accessed a number of sources including but not limited to site selector/commercial real estate professionals, local/regional and northeast based economic development professionals and NYS Empire State Development. In addition, extensive previous development experience, professional contacts and overall research on current development trends, innovative development practices and resulting shifts in private developer/corporate real estate objectives caused from the overall impact of the COVID 19 crisis were utilized to develop the Market Analysis.

Research conducted was diverse in seeking expert opinions and feedback from a network of real estate and development experts. Detailed discussions and data collaboration were conducted with the site selector community, national and regional commercial real estate professionals, strategic governmental economic development leaders, specific sector experts. Research also included analysis of national media reporting on pandemic impacts, prescient econometric data, and the overall professional expertise and experience of the consultant team.

Local input was gained through two public sessions with local residents reacting to the corridor and inspirations for design and markets. In addition, significant feedback was provided by the Town of Montgomery IDA Chairman and Executive Director based on their research, experience, and historic economic activity in the community and region.

The purpose of the Market Study for the Route 17K Economic Development Corridor Study is to access a variety of Northeast sources and market activity to identify market sectors that could be attracted to the Town of Montgomery to diversify the economy and employment base.

A diverse local economy and employment base that considers the future demands of industry and commercial entities will be robust and sustainable.

IN THIS SECTION:

- The New York City Connection
- Identification of Market Sectors
- Public & Stakeholder Input
- Commercial & Industrial Real Estate Market
- Orange County Competitiveness
- Retail & Services Leakage Analysis

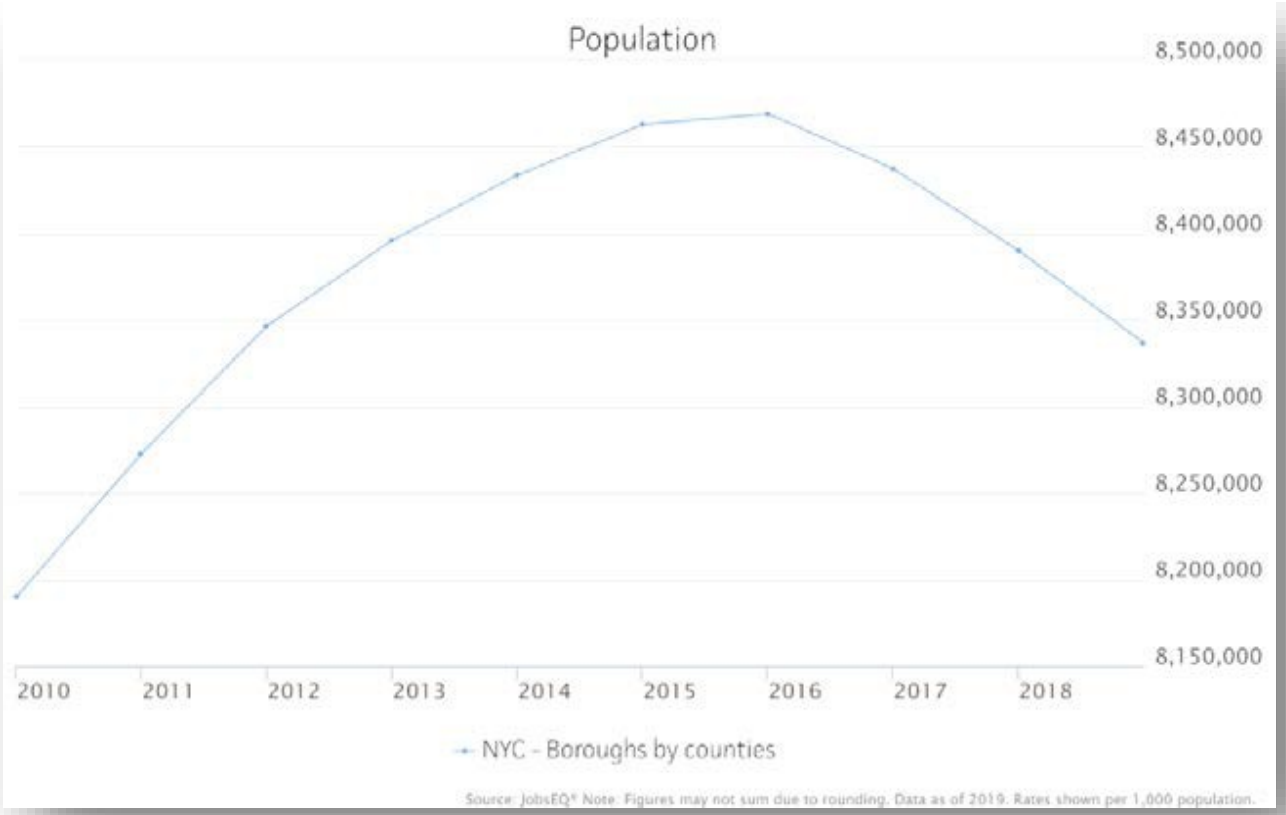
4.1 The New York City Opportunity

As part of the overall market study, a focused and detailed review of the impact of the ongoing COVID-19 pandemic on New York City and other Northeast urban areas was conducted. The objective of this review is to unveil opportunities to connect talent and attract businesses to Orange County and the Town of Montgomery.

After five years of population growth from 2010-2015, New York City (NYC) is experiencing its fifth consecutive year of population decrease **(Figure 4)** Over the ten-year period from 2010 to the present, NYC has experienced a 0.4% growth rate, while the US growth rate is 6.3% for the same period. While COVID-19 is having an impact on growth in NYC presently, these data illustrate that a flight from the City is an issue that exists notwithstanding the current health crisis, perhaps due to the high cost of living and doing business in the City.

The State of New York has shed 1,379,210 residents to other states since 2010. This loss has been offset largely by high birth rates and foreign immigration. However, foreign migration dropped in the past three to four years as a result of a shift in nationwide immigration policies and other factors. Population growth in terms of birthrates also slowed as domestic outmigration from the State increased.

Figure 11: New York City 10-Year Population Change



Several industry sectors that grew in NYC during 2010-2020 timeframe are anticipated to slow or dip into negative growth during the next ten years as illustrated in in yellow below in **Table 5**.

Table 6: Industry Clusters for NYC - Boroughs by counties as of 2020Q1			
Industry Group	**Average Annual Employment Forecast Rate (%) 2020Q1-2030Q1**	**Average Annual Employment Historical Rate (%) 2010Q1- 2020Q1**	**Employment growth rate change**
Textile/Leather	-3.38	-5.44	2.06
Media	-0.12	3.45	-3.57
Retail	-0.36	1.08	-1.44
Professional Svc.	0.21	3.03	-2.81
Consumer Svc.	0.57	2.82	-2.25
Education	0.35	1.74	-1.40
Financial Svc.	-0.25	1.01	-1.26
Construction	1.11	2.06	-0.96
Freight Tran.	-0.01	0.95	-0.95
Public Admin.	0.21	1.83	-1.62
Health	2.31	2.82	-0.51
Manufacturing	-0.81	-1.79	0.97

Source: JobsEQ®

Data as of 2020Q1

Covid-19 further impacted these growth rates as NYC was besieged by the health crisis. Many jobs have transitioned to the virtual sphere, such as those in the financial, consumer, and professional services sectors, while other markets, including retail, were shut down for periods of time greatly impacting employment and economic output. As a result of this environment, many individuals and businesses have questioned whether they need to be located in major urban settings. The advantages of co- and near-location to clusters of highly skilled and trained employment talent have been stripped away or diminished significantly as companies began to move towards more remote work.

Workforce Relocation

In light of the pandemic, many government entities and data analytics firms are evaluating the populations that have left large metropolitan areas such as NYC in 2020. Economic development organizations in mid-size and suburban areas are marketing themselves to capital investment projects and workforce as more attractive alternatives to large metro locations. **Figure 5** below from the New York Times indicates the areas that population from the NYC metro have relocated to as of May 1, 2020.

Figure 12: Relocation of NYC Metro Residents

Source: New York Times

As a result of these data, the Market Study for the Town of Montgomery Route 17K Corridor includes an investigation of the reported 'urban flight' and identifies the potential for these circumstances to be an opportunity to attract workforce talent, corporate investment and jobs.

Data indicates that populations are leaving NYC and San Francisco in record numbers; however, the same effect is not occurring in every city at the same rate. Cities with lower density, less reliance on public transportation, and lower cost of living appear to be less impacted. Given that not all urban core areas are experiencing the same level of out-migration as NYC and San Francisco, investigation as to the forces that are driving the high level of outmigration is warranted.

Research and anecdotal evidence indicate that concerns regarding **density** and **cost of living** are driving both individuals and companies to consider relocation. These concerns were driving out- migration prior to the pandemic, but recent health concerns and risks to doing business along with living in a dense urban environment have increased the rate considerably. NYC offers a high cost of living and doing business in a densely settled environment that is not conducive to social distancing and rising health concerns. The coronavirus pandemic highlighted risks involved with a public transit supported workforce and dense workspaces. Individuals who no longer have to be in the office due to the ability and encouragement to work remotely have begun to look elsewhere for better quality of life, access to recreation and services, and a lower cost of living.

Individuals and companies have many reasons for relocation but the following list enumerates some key considerations:

- If the company/individual doesn't have to be in the city they may be considering work elsewhere;
- If it isn't beneficial to be in proximity to the city for ties to clients, Wall Street, key customers, etc... then those individuals/companies are looking further than the suburbs of NYC;
- Those companies are looking to relocate in areas where similar industries/suppliers are already located or their employees are interested in living; and,
- Quality of life and cost of living are huge considerations for employees as they consider where to work remotely.

Competition for this migration opportunity includes mid-sized cities such as Austin, Texas, Boise, Idaho, Colorado Springs, Colorado, Greenville, South Carolina, Kansas City, Kansas, Raleigh-Durham, North Carolina, and Reno, Nevada as well as the suburbs and exurbs of major cities like NYC, Boston, Chicago, SF, and LA with a lower cost.

Suburbs are the ring of development adjacent to the city or urban core; whereas exurbs are area further out, beyond the suburbs. Exurbs are situated in more rural areas and may be surrounded by open space, recreation and farmland. Suburbs offer a lifestyle close to transportation, shopping and entertainment, while exurbs provide a remote location, generally free from noise and congestion. In this context, Montgomery is an exurb of New York City.

These suburbs and exurbs are the places that are in competition for Orange County and the Town of Montgomery for workforce and businesses. The quality of life, mix of housing choices, recreation, open space and some level of urban amenities remain important, but at a much smaller scale. The proximity to NYC is the prime location advantage to attract companies and talent that still have a requirement at some level to stay close to the urban center.

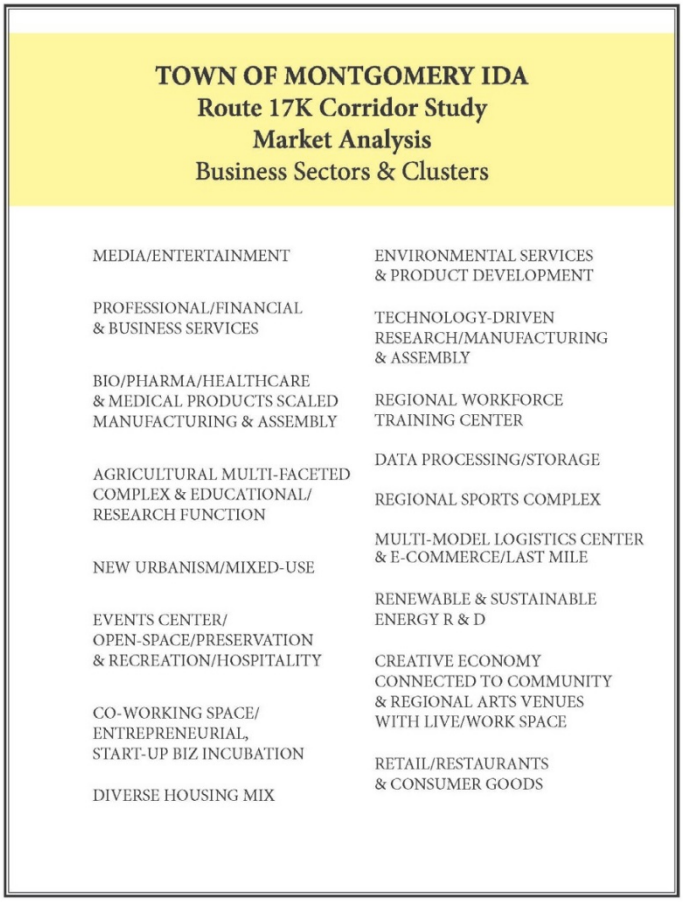
4.2 Identification of Market Sectors

In consideration of the locational advantages of the Town of Montgomery and the regional trends in outmigration from NYC and business interests, business sectors and potential clusters of development were identified and vetted through market contacts. The sectors identified in **Figure 6** are primed for existing businesses to be attracted to Montgomery and in time, to develop organically through local and regionally driven entrepreneurial support and quality co-work space.

The 17K Corridor area has distinct and well-defined economic development potential to create business clusters. Business clusters are geographical locations that features concentrated resources and competences that reach a critical threshold to result in a sustainable competitive advantage for a particular industry. Business clusters affect competition by increasing the productivity of companies in the cluster, driving innovation in the field, and stimulating new businesses in the field.

Most promising clusters with significant value-added employment opportunities that can be attracted are Media and Entertainment; Professional, Financial and Business Services; Bio/Pharma and Healthcare product development; and modestly scaled Research and Development (R&D) with related manufacturing. The Corridor also features land base and utilities that could support high energy demand, which could support Data Processing and Storage along with Renewable and Sustainable Energy site needs.

Figure 13: Business Sectors & Clusters



The Corridor also has the potential to support the creative economy through maker and artist spaces integrated with housing and consumer services in the creation of mixed-use sites that could feature design inspired by New Urbanism. New Urbanism is a planning approach that references the manner in which cities and villages in the early 20th Century developed organically, with walkable streets and blocks, diverse housing, shopping and work integrated, and accessible public spaces. New Urbanism focuses on human-scaled urban design. In the Route 17K Corridor, there are opportunities for this type of development adjacent to the villages and/or with connectivity to outdoor recreation, hiking and biking to foster a lifestyle attractive to the creative economy.

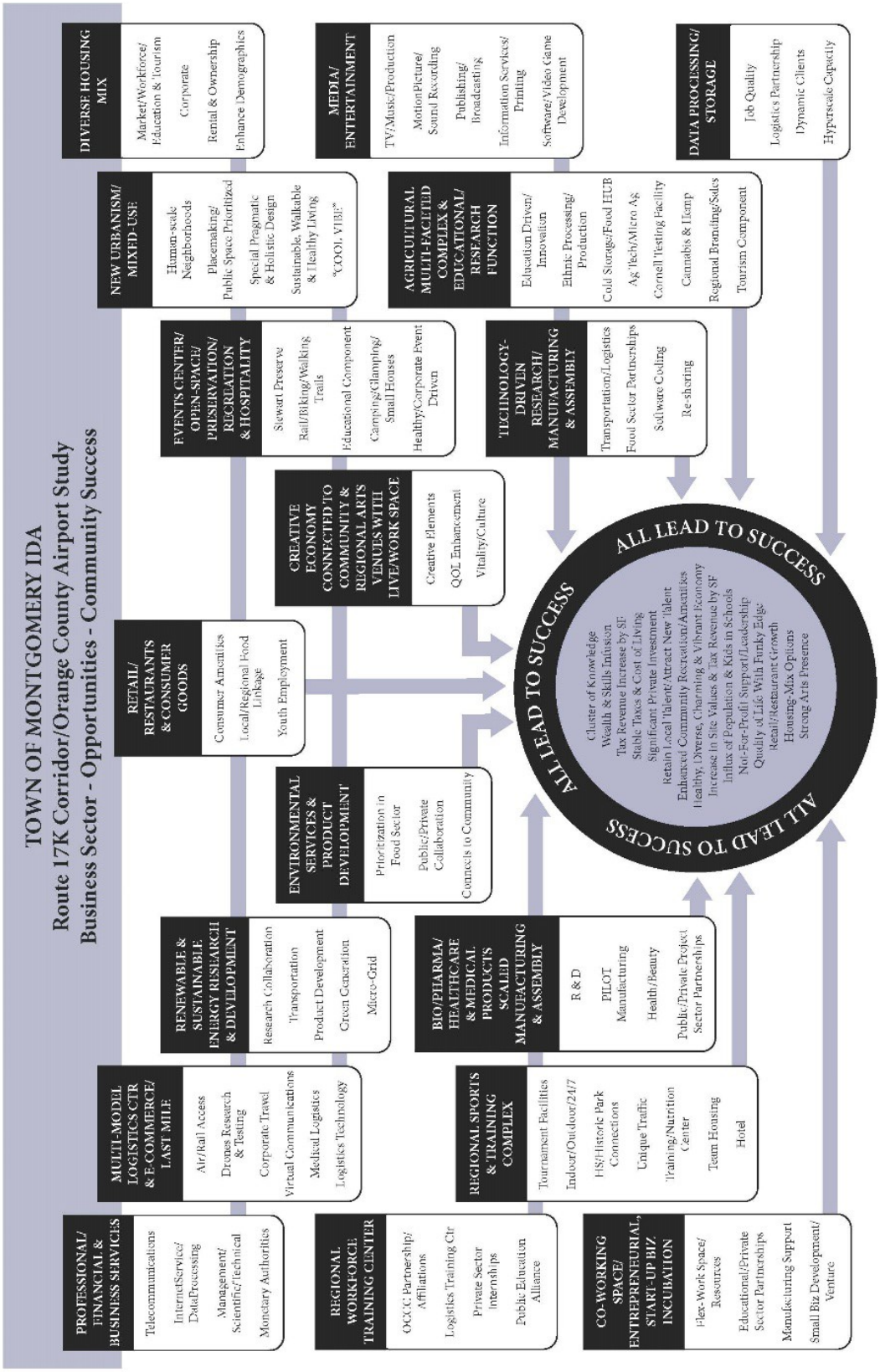
The application of New Urbanist principals to create hubs for economic activity does not detract from the existing villages; rather the concept creates concentrations of people that will flock to the existing villages to enjoy shops, restaurants and services. This is accomplished by ensuring that the land uses in the New Urbanist areas are not in competition with those in the existing villages.

Other clusters with moderate economic impact that could be fostered in the Corridor include a focus on ethnic agricultural production, a regional sports complex and events center with a strong focus on recreation, hospitality and direct operational connection to the Stewart Forest Preserve. This concept may involve physical proximity of new investment to the Forest Preserve or it could involve cross way finding and marketing between the new land use and the Preserve. The destination nature of this type of development together with associated business partnerships with existing local and regional sectors provides growth and diversity potential.

The Orange County Airport and adjacent parcels provide the greatest opportunity in the logistics and agricultural sectors. This area will support other sectors identified for the Corridor with multi-model transportation assets in a location with minimal local traffic impact. To bring this opportunity to fruition, an overall Master Plan for the airport and surrounding area is a logical next step to define the multi-model potential of this area. Research indicates that there may be opportunities to support an ethnic food processing hub which would take advantage of businesses currently located in the NYC boroughs that are seeking new locations. This concept would include agricultural uses, storage, and facilities for import and export, which may take advantage of local Foreign Trade Zone #47.

The business sectors and cluster opportunities identified each bring a value proposition for the Town of Montgomery as depicted in Figure 7 on the following page. A value proposition is the benefit of a particular product or service or in this case, business sector. Under Home Rule and through the use of zoning, the Town of Montgomery has the ability to encourage and promote land uses that bring the most value to the Town in both tangible and intangible terms. The business sectors and clusters identified in this Market Study "All Lead to Success" which equates to improved and sustained quality of life as demonstrated in the **Figure 7** diagram. To capture the value proposition of the identified markets, the Town must consider the zoning recommendations provided at the conclusion of this study.

Figure 14: Business Sectors and Opportunities



4.3 Public and Stakeholder Input

During the Market Analysis, on September 30, 2020, two public information sessions as well as a stake holder meeting were conducted. The purpose of these meetings was to seek local opinions on regional opportunities, entrepreneurial activity and overall priorities in the community.

The format for each public meeting was an open house, with a map of the Corridor Study area with parcel boundaries and an aerial photograph and labels of roads and major landmarks as the background for orientation purposes. Additionally, inspiration boards were presented to depicted potential commercial, industrial and mixed uses. There was no presentation or Q&A per se. Through an introductory statement, attendees were encouraged to use sticky notes to provide thoughts and comments regarding the existing land uses on the corridor and the inspiration land uses as well as any other points of interest. Reproductions of the inspiration boards is provided as **Appendix C**.

The stakeholder meeting assembled a group of property owners, real estate professionals, local engineers and attorneys regularly engaged in land development in the town and region. While the presentation materials were the same for this meeting as for the public input sessions, the format was a roundtable discussion with stakeholders providing input regarding their interests in the Corridor area and what is working and is not working to meet the demands of the market.

4.3.1 Public Input

A small but focused number of people attended the public input sessions which were conducted from 7AM to 9AM and from 6PM to 8PM. Both sessions were conducted in the meeting room at Town Hall with social distancing, masking and sanitization protocols in place. A summary of the public input from each session is summarized at right.

MORNING SESSION (7-9AM)

- Lacking internet connectivity
- Work from home
- No market for office space
- Research and development
- Airport buffer zone
- Connect parks and pet lodging to foster tourism
- More entertainment
- Preserve farmland
- Greenspace and agrotourism
- Improve existing park land
- Learn from Town of Newburgh about office space and speculative building
- Keep active farms
- Keep study to Route 17K only
- There is no water or sewer for high density housing
- Senior housing* (2 comments)

EVENING SESSION (6-8PM)

- Maintain County land as ag land – people need to eat
- Buffer needed around school because safety for kids
- Keep green space available at Barron Road/Route 17K recreational and residential at end of Stewart State Parklands:
  - Horseback riding
  - Dirt bike trails
  - Bicycling and hiking
- Senior housing in close proximity to village*
- Agritourism – a fun place for locals to socialize
- Greenspace needed in design of new sites
- Recreation center for kids needed with sports fields, etc.
- Close to airport have facilities for conferences, meetings, retail, car rental, etc.
- Food hub and slaughter house to help farmers stay viable
- Makers studio to help small scale businesses
- Whole Foods
- Housing for younger people
- Jobs for young college grads so they can stay in the area
- No developments with cul-de-sacs* (3 comments)

In terms of inspiration land uses and design aesthetics, a combined summary of the input can be found in **Table 6** below:

Table 7: Inspiration Land Uses and Design Aesthetics			
Inspiration	**Yes**	**No**	**Maybe**
Live/Work Commerce Park	2	4	
Suburban Business Park	2		1
Boutique Manufacturing Center	2		
Flex-space Tech Park	6	1	
Business Campus	1	3	
Mixed Use Rural Design	3	1	
Research and Development Park	3		
Manufacturing Campus		3	1
Live/Work/Play District	1	1	1
Rural Office Park	4		
Innovation Campus	4		1
Residential Campus	5		

COMMON THEMES:

- *Need for senior housing*
- *Maintain agriculture and leverage it for business and tourism*
- *Provide greenspaces; preserve and enhance parks*
- *Water, sewer and internet infrastructure is needed*
- *Entertainment and sports facilities are supported*
- *Buffers around sensitive land uses are important*
- *A variety of employment (ag, maker, R&D, jobs for college educated) is supported*
- *Office space is not supported due to perception there is no market*
- *Manufacturing, Business Campus and Live/Work Commerce Parks are not supported*

4.3.2 Stakeholder Input

The stakeholder meeting assembled a group of property owners, real estate professionals, local engineers and attorneys regularly engaged in land development in the town and region. While the presentation materials were the same for this meeting as for the public input sessions, the format was a roundtable discussion with stakeholders providing input regarding their interests in the Corridor area and what is working and is not working to meet the demands of the market. A summary of the stakeholder input is:

- Disjointed, overly prescriptive zoning is a barrier to investment
  - Corridor style zones where parcels are split between zoning districts leads to varying interpretation of allowed uses
  - Aside from corridor zoning, large parcels split by zoning districts prevents cohesive plans
  - Outdated and limited land uses allowed as of right or by special permit prohibit development meeting current market demands
- Lack of public water and sewer infrastructure inhibits high value development
- Onerous approval process inhibits quality development proposal for local developers (only large corporations have the time and money to get through the process)

Interesting, the market analysis and the public input align in a number of key areas, including but not limited to support for a diversification of the employment opportunities agri-business, makers, and R&D as well as entertainment and sports facilities. Additionally, both the market analysis and the public identified open space and recreation as critical features of the Town to be protected, enhanced, integrated and leveraged.

4.4 Commercial and Industrial Real Estate Market

Resulting from the many conversations and research conducted, the potential for the local and regional real estate market is vibrant, but still limited due to a lack of site predictability and infrastructure capacity. However, if the community atmosphere shifts towards embracing an expanded attraction of diverse sectors with smaller scale and value-added jobs through comprehensive environmental review, clear definition of the type of investment to be encouraged and locational readiness and the infrastructure is enhanced, the potential to attract newly defined sectors bringing higher paying jobs and more significant private investment can be realized.

Opportunities certainty exists in the Corridor for the logistics sector, which also include smaller projects to support e-commerce and last-mile facilities. Other existing real estate demand includes life science production, smaller offices and co-working space, warehousing and refrigeration storage buildings, small scale manufacturing and food related production, cannabis, some energy related storage or production as well as affordable housing options.

Growing and future opportunities are clearly more diverse than existing interest potentially bringing projects that produce significantly more community value. The future success is clearly connected to a collaborative attraction of talent, development of an educated and skilled workforce pipeline, and site predictability matching demand. The existing commercial and industrial real estate market are capable of supporting the business sectors and clusters identified in the Market Study; new zoning and infrastructure are necessary to bring these markets to fruition.

4.5 Orange County Competitiveness

Orange County and the Town of Montgomery are extremely competitive for certain types of projects, as illustrated by current investment and interest shown in applications for land use approvals. However, concerted action is needed to advance a more aggressive strategy to attract more value-added opportunities and better jobs identified in the Market Study.

The Town has attracted the interest of logistics investment due to a combination of shifts in the manner in which business and consumers acquire goods, locational advantage, available land base, and a permissive land use code. For many years, there have been numerous large-scale logistics centers along Neelytown Road. Recently, Medline and Amazon have received approvals for logistics centers outside the Neelytown Road corridor which has legitimately raised concerns regarding the scope, scale and impact of this type of land use in the Town.

It is precisely because Orange County is highly competitive for logistics investment that there is so much development pressure in this regard. It is the objective of this study to take advantage of that competitiveness to capture business sectors other than logistics that will rebalance the local job market and spin-off investment to sustain quality of life.

Viable, affordable sites that can accommodate a mix of project types and scale exist in Montgomery along the Route 17K Corridor and in the area adjacent to the airport. The proximity to a major transportation hub remains a strong asset, and many of those opportunities are now enhanced due to proximity to NYC and resulting pandemic relocation of both workforce and existing business which will offer an excellent shift in project diversity. Cost of sites and overall expense of doing business in Montgomery is extremely attractive to businesses outside the warehouse and distribution sector that are currently operating in the New York City real estate market.

Under Home Rule and through the use of zoning, the Town of Montgomery has the ability to encourage and promote land uses that bring the most value to the Town in both tangible and intangible terms. Updates to the Town's land use code will result in predictability for the public as well as those seeking to invest in building or enhancing a business in the Town. That predictability will ensure the public that the balance of land uses and job types is maintained and will increase Orange County and the Town of Montgomery's competitiveness for the business sectors identified in the Market Study. In land development, predictability reduces timeframes and development costs which brings tremendous value and drives investment to the land uses the Town most desires.

4.6 Retail and Services Leakage Analysis

A leakage analysis is a review of the spending power in a particular geography and how much of that spending powers is invested within that geography and how much leaves the geography to meet demands. A retail and service leakage analysis evaluates consumers spending money outside their local market. In economic development terms, if there is leakage for specific retail or services, there may be an opportunity to plug the leak by encouraging the development of retail opportunities and services within the community so the spending stays local.

An evaluation of local consumer spending leakage data for the Town of Montgomery results in the identification of several retail and service sectors as significant opportunities for Town to attract as part of an overall economic development plan.

Together with community amenity and small-scale retail, retail and service subsectors that may be attractive to drive local projects, consumer interest and sales tax revenue include:

- Clothing and Clothing Accessories
- Furniture and Home Furnishing
- Sporting Goods, Hobby, Book and Music
- Electronics and Appliances
- Motor Vehicle and Parts Dealers
- General Merchandise
- Non-Store Retailers
- Food Services and Drinking Establishments

The most significant retail product opportunities by industry group within the aforementioned subsectors include:

- Direct Selling
- Shoes
- Jewelry, Luggage, and Leather Goods
- Special Food Services
- General Department
- Clothing
- Home Furnishing
- Drinking Establishments
- Books, Periodical and Music

Based on an initial review of the information detailed in **Figure 8, Figure 9** and **Table 7** on the following pages, the highest anticipated retail demand growth by subsector is in the areas of Food, Entertainment & Recreation, Financial Services, and Apparel & Services.

Figure 15: Leakage/Surplus Factor by Industry Group

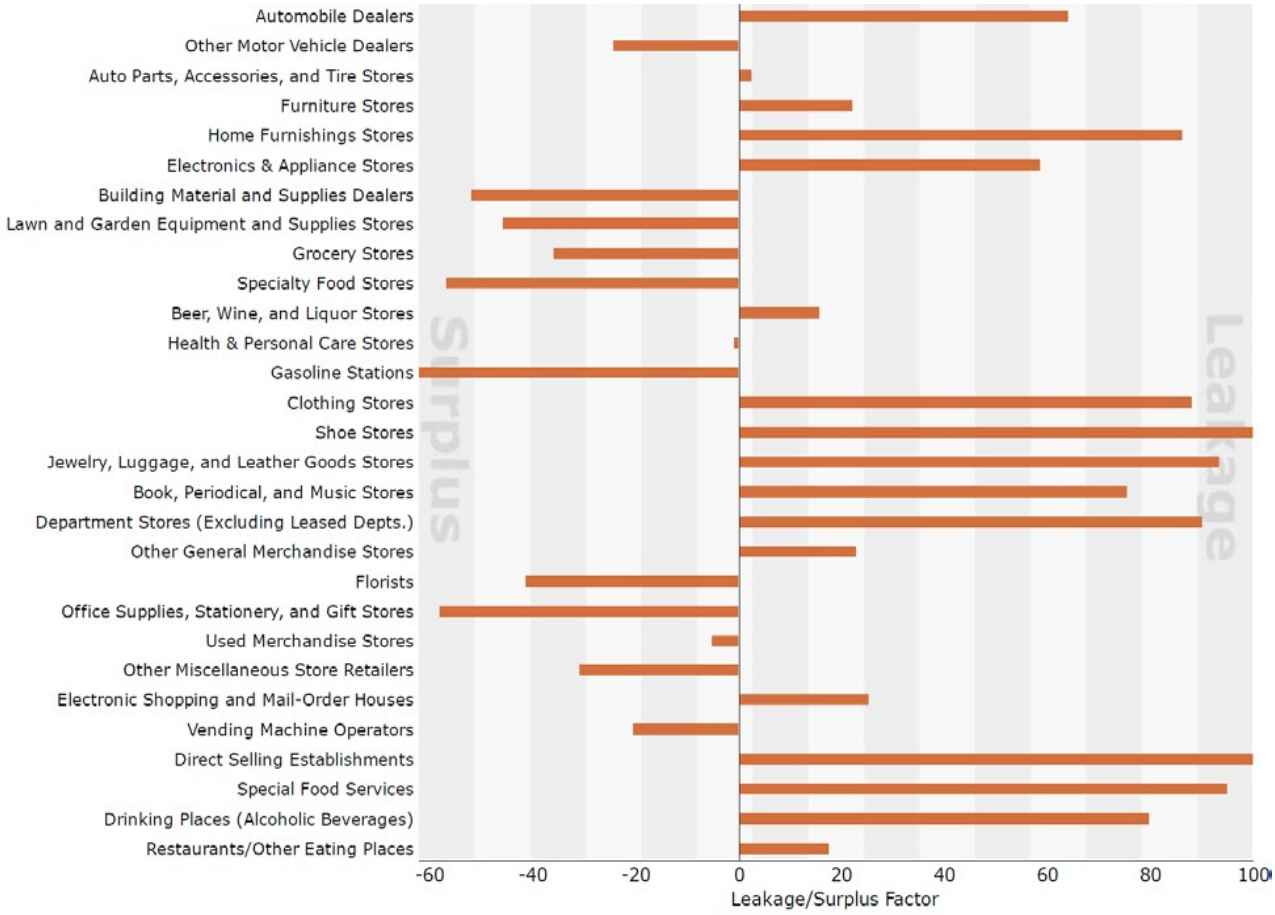


Figure 16: Leakage/Surplus Factor by Industry Subsector

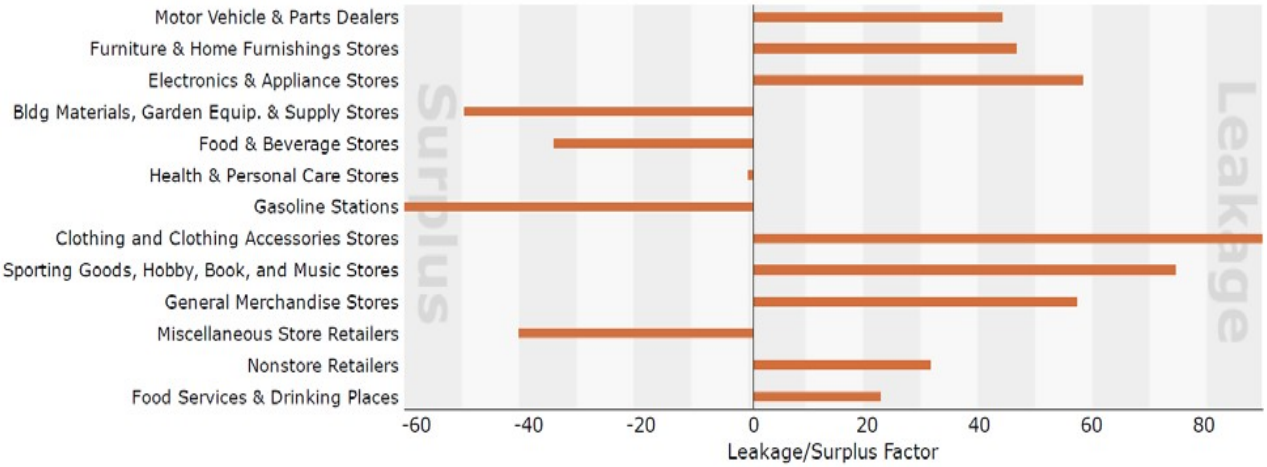


Table 8 – Industry Subsector Summary						
Retail Industry Group	**NAICA**	**Demand**	**Supply**	**Gap**	**Leakage/ Surplus**	**Businesses**
Motor Vehicle & Parts Dealers	441	$59,817,601	$23,085,998	$36,731,603	44.3	16
Furniture & Home furnishings Stores	442	$11,087,655	$4,007,057	$7,080,598	46.9	4
Electronics & Appliance Stores	443	$11,551,512	$3,007,319	$8,544,193	58.7	2
Bldg Materials, Garden Equip. & Supply Stores	444	$19,007,511	$59,369,176	-$40,361,665	-51.5	23
Food & Beverage Stores	445	$52,404,898	$109,879,098	-$57,474,200	-35.4	13
Health & Personal Care Stores	446, 4461	$24,930,197	$25,454,352	-$524,155	-1.0	8
Gasoline Stations	447, 4471	$29,239,613	$124,929,153	-$95,689,540	-62.1	12
Clothing & Clothing Accessories Stores	448	$25,871,543	$1,297,163	$24,574,380	90.5	4
Sporting Goods, Hobby, Book & Music Stores	451	$8,864,357	$1,258,965	$7,605,392	75.1	5
General Merchandise Stores	452	$35,909,263	$9,645,899	$26,263,364	57.7	10
Miscellaneous Store Retailers	453	$11,324,231	$27,569,894	-$16,245,663	-41.8	27
Non-store Retailers	454	$9,485,630	$4,920,615	$4,565,015	31.7	2
Food Services & Drinking Places	722	$33,484,417	$21,111,867	$12,372,550	22.7	55

The data indicates that there is leakage or spending power leaving the local economy in a number of key areas. The Town of Montgomery can, through the Comprehensive Plan as well as land use and zoning code updates, encourage investment than can stem or plug this leakage to benefit residents and the local economy.

5.0 DEVELOPMENT OPPORTUNITIES

As initially conceived, the Development Opportunities task was intended only to generate information regarding the available land base and resulting square footage of potential development in consideration of the business sectors identified in the Market Study. In conducting research, it is clear that workforce is as much a resource issue as land base if the Town of Montgomery is to attract high value secondary sectors. Thus, a discussion of workforce as well as land base and square footage is provided.

5.1 Workforce

The Orange County Story, Seizing the Development Opportunities

With a stable if even growing population, Orange County and the Town of Montgomery are positioned to attract talent and companies from the New York City metro and beyond. Orange County is positioned in eastern New York to offer specific advantages to companies and individuals seeking an alternative location outside the dense urban environments of New York's Five Boroughs and Westchester and Rockland counties for work and living space. With a lower population density and an exurban to rural environment in close proximity yet separate from Westchester, Rockland and the City proper, Orange County is competitive with other areas of the region for relocation.

Key attractive characteristics of the exurban environment in Orange County and the Town of Montgomery:

- High quality of life
- Sense of safety and community
- Lower cost of living
- Numerous vibrant small urban centers/villages
- Currently well-defined industry clusters
- Extensive open-space and recreational assets
- Local/regional quality food and beverage experiences
- Availability of urban amenities in proximity
- High purchasing power
- Lower population density
- Demonstrated ability to compete for investment nationally
- Quality, multi-modal transportation networks for goods and people
- Solid educational opportunities

While there has been a trend of the past several years of outmigration from dense urban centers to the exurbs (the ring of development outside suburbs), the pandemic appears to be accelerating this trend and Orange County as well as the Town of Montgomery specifically have been and will continue to benefit from this movement.

Population and Migration

Orange County has a population on the rise. The county swung from a nearly 10% domestic out-migration rate in 2012 to a 1.4% domestic in-migration rate during 2019. Anecdotal evidence suggests that this rate could accelerate post pandemic. Orange County's labor force is also increasing while NYC's is decreasing.

Figure 17: Orange County Population

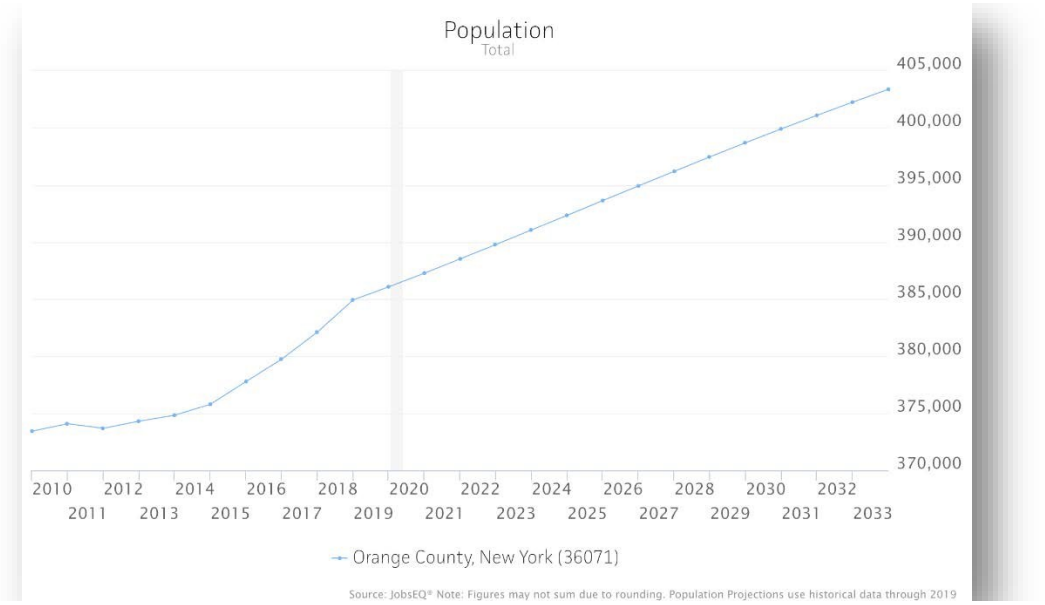


Figure 18: Orange County Labor Force

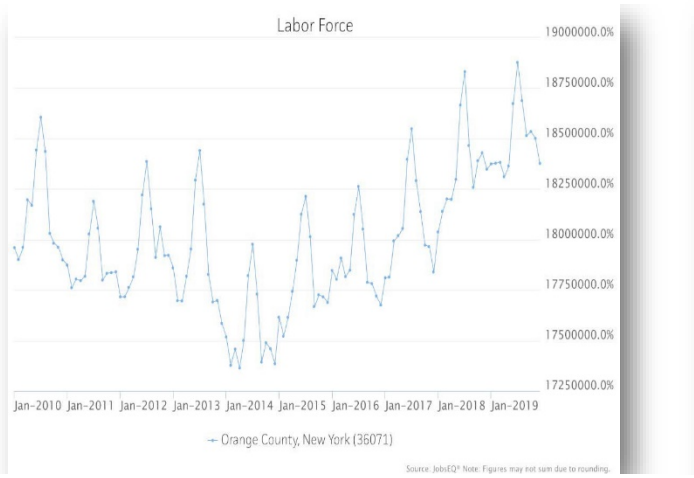
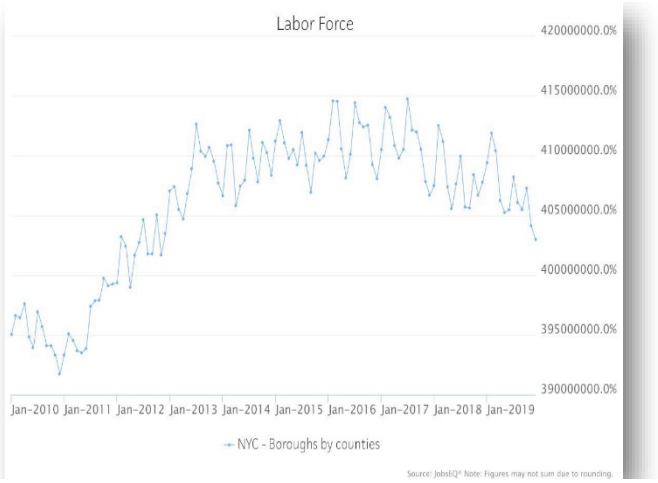


Figure 19: NYC Labor Force



Relocation Metrics

Working with an experienced, nationally recognized site selector (site selectors consult with major industry to determine the best locations for businesses), a review of the geographic competitors to Orange County including the attributes of each area was completed. A profile was developed for employees as well as industry in which Orange County might compete for locational advantage. One critical factor for both employees and businesses proximity for a day trip (overnight stay not required) into New York City, which is defined as a three-hour one-way drive.

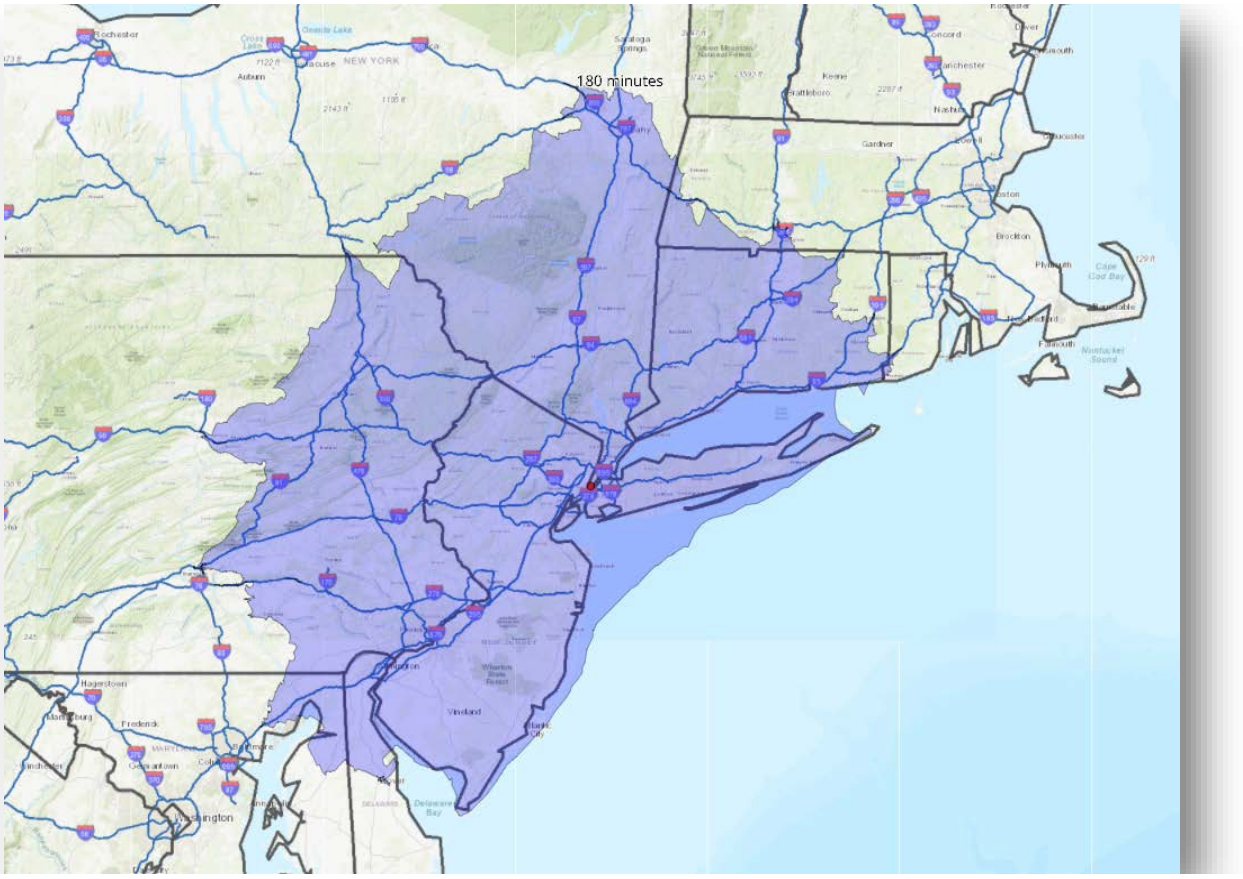
Employees:

- Persons working remotely but with need to be in proximity to New York City to conduct day trips to maintain contact with clients, co-workers, business partners, and industry peers.

Industry:

- Requires proximity to the NYC market
- Can serve the region outside of the urban markets
- Needs to remain in the state

Figure 20: Three-hour drivetime from Manhattan



Industry Clusters

To determine the opportunities for which Orange County could be competitive, it is instructive to identify industries that might already be on the decline in or exiting New York City. **Table 8** provides a listing of growth or decline in industry clusters within the City. Those in decline in the City (highlighted in yellow) that could be attracted to Orange County, including Media,

Professional Services such as doctors, lawyers, engineers, architects, accountants, tax professionals, information technology, and management consulting, and Financial Services. Additionally, the overall decline in businesses and population in the City may result in migration of people and businesses that could spur secondary growth to support these industries and their employees.

Many of these industries involve jobs that can permanently relocate outside the City, and there is data to support that this is happening, but that the businesses are still connected to the City in a meaningful way, which means they are unlikely to leave the area over time.

Table 9: Industry Clusters for NYC - Boroughs by counties as of 2020Q1

Industry Group	Average Annual Employment Forecast Rate (%) 2020Q1-2030Q1	Average Annual Employment Historical Rate (%) 2010Q1- 2020Q1	Employment growth rate change
Textile/Leather	-3.38	-5.44	2.06
Media	-0.12	3.45	-3.57
Retail	-0.36	1.08	-1.44
Professional Svc.	0.21	3.03	-2.81
Consumer Svc.	0.57	2.82	-2.25
Education	0.35	1.74	-1.40
Financial Svc.	-0.25	1.01	-1.26
Construction	1.11	2.06	-0.96
Freight Tran.	-0.01	0.95	-0.95
Public Admin.	0.21	1.83	-1.62
Health	2.31	2.82	-0.51
Manufacturing	-0.81	-1.79	0.97

Source: JobsEQ®

Data as of 2020Q1

Orange County and Montgomery are in the Hunt for High Value Jobs

The media, professional services, and financial services each have significant industry clusters or hubs in New York City as well as other northeastern cities, with those anchors providing locational advantages to Orange County to capture outmigration. Jobs in these sectors require a degree of higher education and training, and result in higher wages and more robust benefits to workers which translates into economic power in the community that hosts the workforce.

Orange County has relatively flat growth in these sectors (projected between -1% and 1% growth in each sector) and lower numbers of businesses in these sectors than in the City, as is to be expected. In addition to location and land base to support businesses in these sectors, human resources are required and the area's educational attainment is key to understanding is the employment pool could support these industries.

An evaluation of the highest level of education attainment for ages 25-64 years, Orange County performs below the State average with respect to four-year college degrees or higher educational attainment. A pool of potential employees with a bachelor's degree in a wide variety of fields is particularly attractive to the media, professional services, and financial services sectors in seeking locations to create offices and jobs. Employers in these sectors are likely to seek an existing educated labor pool for hire, for suppliers, or for future employment stability.

Table 10: Educational Attainment by Jurisdiction

Educational Attainment Age 25- 64	Orange County	Capital District	New York State	USA
No High School Diploma	9.2%	6.4%	11.7%	11.2%
High School Graduate	28.2%	23.6%	24.4%	25.8%
Some College, No Degree	20.4%	17.1%	16.2%	21.0%
Associate's Degree	11.2%	13.4%	9.5%	9.1%
Bachelor's Degree	18.5%	22.3%	22.3%	20.8%
Postgraduate Degree	12.5%	17.2%	16.0%	12.1%

These statistics highlight a workforce challenge for Orange County. However, the County is positioned to take advantage of a strategic approach to address the workforce education gap through partnership at all levels within the regional education system. Orange County Community College in particular with the anticipated four-year college affiliations is capable of addressing this weakness.

Aside from creating a home-grown educated workforce, the gap may be closed by attracting existing workforce in the identified sectors and overall young talent to relocate to the County.

The Orange County and Town of Montgomery Attraction for Talent

The area's quality of life, recreation opportunities, and lower cost of living may be attractive to some individuals interested in a change from an urban environment. Montgomery's proximity to Newburgh and Middletown provide metropolitan environments scaled for comfort and attractive in diversity and easy access. Table 10 provides the relative salary, cost of living index and purchasing power for the City, the County, the Capital District (for comparison) and the nation.

Table 11: Cost of Living

Location	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
NYC - Boroughs by counties	$89,635	174.7	$51,293
Orange County, New York	$49,397	150.9	$32,734
Capital District	$57,265	108.8	$52,642
USA	$57,624	100.0	$57,624

Source: JobsEQ®
Cost of Living per C2ER, data as of 2020q1, imputed by Chmura where necessary.

In terms of these factors, Orange County is competitive with other areas across the country. In combination with the locational advantage relative to the New York Metro area and lower density as well as higher quality of life including recreation and safety, Orange County and the Town of Montgomery are positioned to attract an educated workforce.

While the ingredients are present to attract quality workforce, a strategic plan is needed to market the County and Town to potential new residents. To implement a strategic Talent Attraction Program, several amenities or incentives could be offered in public/private partnership for relocation to the area. Examples of amenities and incentives include co-working space, new or enhanced existing world class public recreation/hiking/biking spaces, farm-to-table/locavore/healthy food programs, energy sustainability commitments, support of the creative culture, educational opportunities, new urbanism designed community elements, and housing and work from home incentives.

Several communities are attracting talent during these challenging times by offering subsidy for relocation costs and even have gone so far as to offer a stipend and workspace for the first year. Examples of such efforts include:

Tulsa Remote: Offering $10,000, space at a local co-working space, and more to move there. Focused on tech and creative workers.

Savannah: $2,000 moving expense reimbursement for tech workers (50 person limit); $12,000 Facility Rental Assistance Grants for technology firms that create a minimum of 10 new positions; $20,000 High Wage Job Creation Grant for every five high-technology jobs created and retained for one year.

While municipal budgets may see declines in revenues as a result of the pandemic, it is challenging to save the way out of a financial crisis as there will come an end to the savings to be had. Rather, most economists agree that strategic spending in a crisis drives growth and reduces the duration if not the severity of the crisis.

Business and Development Employment Growth Drivers

An area's business growth (positive or negative) can be attributed to nationwide industry growth or a particular industry mix, as well as the area's own impact on the industry's growth. Generally speaking, industries in Orange County are encouraged to grow by an overall positive development environment encouraged by governmental leadership and economic development organizations. This strong institutional support positions the County and Town of Montgomery to expand the local competitiveness factor in order to increase employment for the area.

Institutional support is a clear growth driver; however, to be successful, local communities must embrace or create and market an accepted vision of growth. The combination of strong institutional support and a well-defined community vision has historically resulted in significant competitive advantages that sustains investment in new or expanded markets.

The growth of high value employment and diverse business sectors matching the community's vision is derived from a predictable land use approval process with reasonable timeframes. These factors will support the expansion or attraction of new economic drivers with community support. The recommendations of this study include setting the vision, prioritizing next steps, conducting an aggressive campaign, and engagement with the community to develop the vision for the next decade, setting the stage for the Town of Montgomery to play offense.

5.2 Site Analysis and Build Scenarios

Working in conjunction with the IDA and GIS/RPS data, in consideration of natural constraints, an evaluation of the land base within the Route 17K corridor and surrounding the Orange County Airport was conducted. Given the identified market conditions as well as properties on the market and vacant or underutilized land, the consultant team developed criteria for screening sites including but not necessarily limited to:

- Minimum site size for developable area (e.g. eliminate wetlands, watercourses, steep slopes, etc.)
- Maximum distance from highway access
- Surrounding land uses

The team applied the screening criteria to properties in the Corridor to evaluate the overall potential for the Corridor to meet market demands. Based on this, generic build scenarios were created and square foot of potential development was calculated. The generic build scenarios together with tabular data regarding square footages were reviewed with the Chairman and Executive Director of the IDA to secure feedback regarding scope and scale of the market vision.

The site analysis also included a visionary look at potential transformational sites with related development scale and sector analysis across the 17K Corridor and Orange County Airport area with other strategic and adjacent parcels. The purpose of this step was to develop concepts for innovative zoning recommendations and strategic planning for public infrastructure. This process was visionary and did not include contacting property owners as in many cases, the existing zoning and/or infrastructure does not permit the vision. If the Town embraces the zoning recommendations, then it is expected that a very comprehensive public engagement process would be conducted to secure property owner input.

Development potential of the overall land base in the Route 17K and Orange County Airport area that would be attractive to larger scale development in terms of site acres, buildable acres and building footprints should be considered is as follows:

Table 12: Area Summary

Area	Site Acres Total	Buildable Acres	Building Footprints SF	Open Space Acres
Route 17K Corridor	1,484	371	6,322,724	1,113
Orange County Airport Area	829	207	4,325,145	622

In terms of the development vision, the process of creating generic build scenarios on properties within the study area is informative as to the vocabulary of scale to be recommended for a new zoning code. Layouts are provided as examples to be considered by the Town in the context of new land use codes.

Figure 21: Professional Offices, Media, Workforce Training, Co-working Space

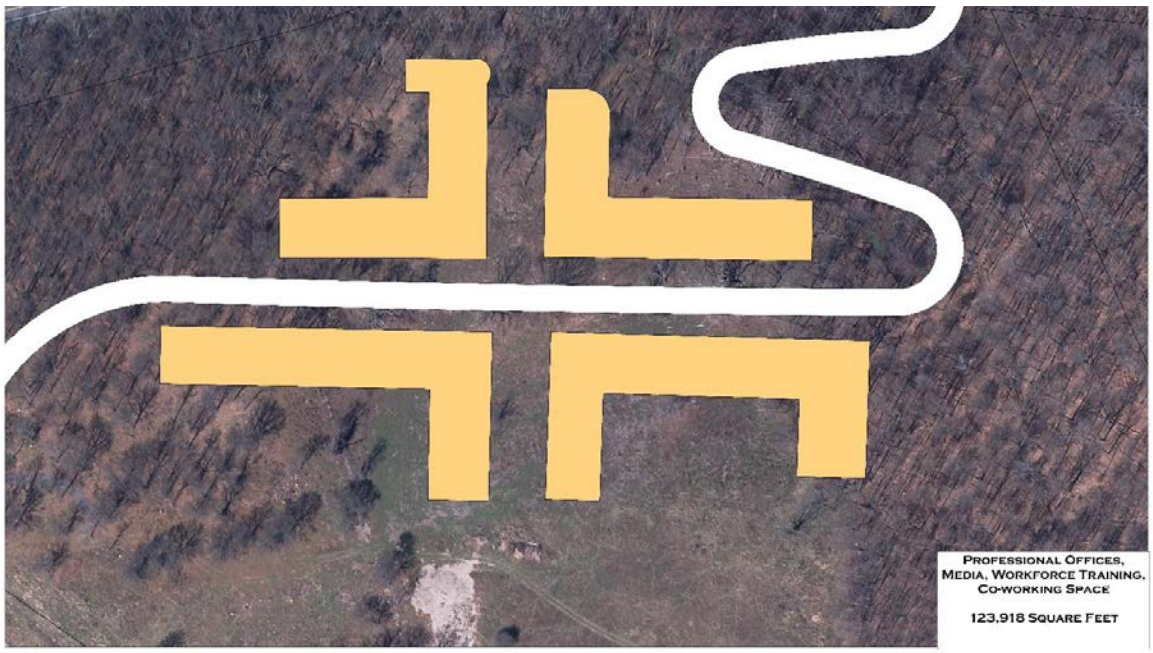


Figure 22: R&D, Energy, Pharma, Medical, Environmental Products, Tech, Data Processing

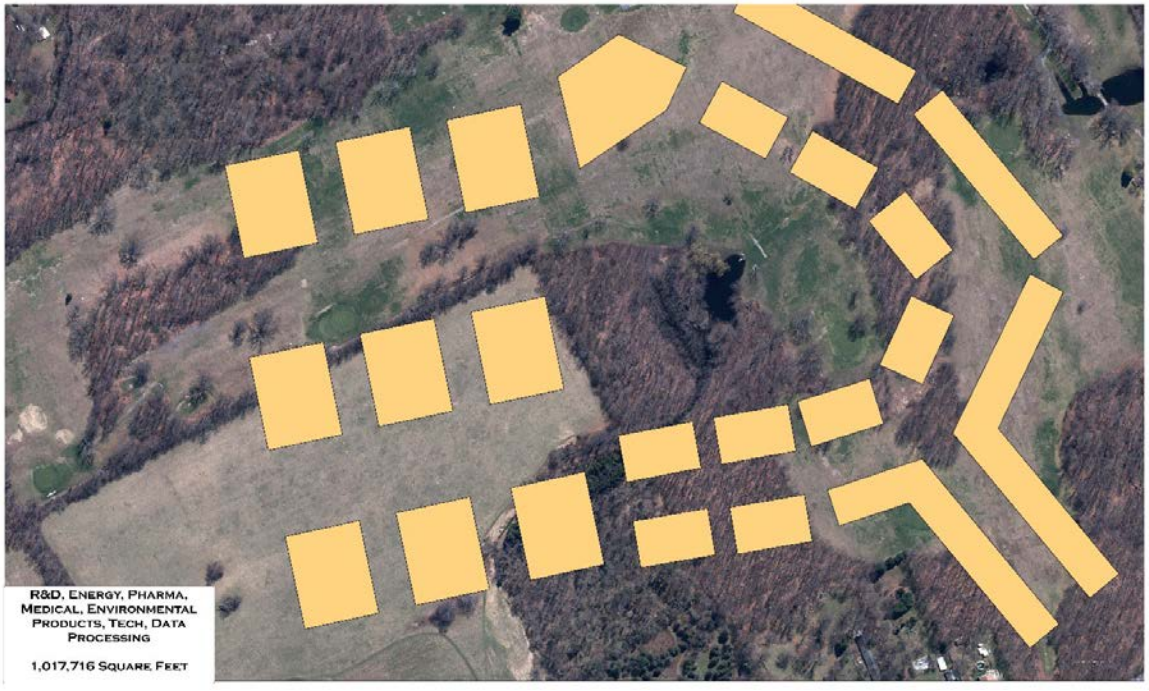


Figure 23: Regional Sports, Entertainment, Events

Figure 24: Retail/Restaurants

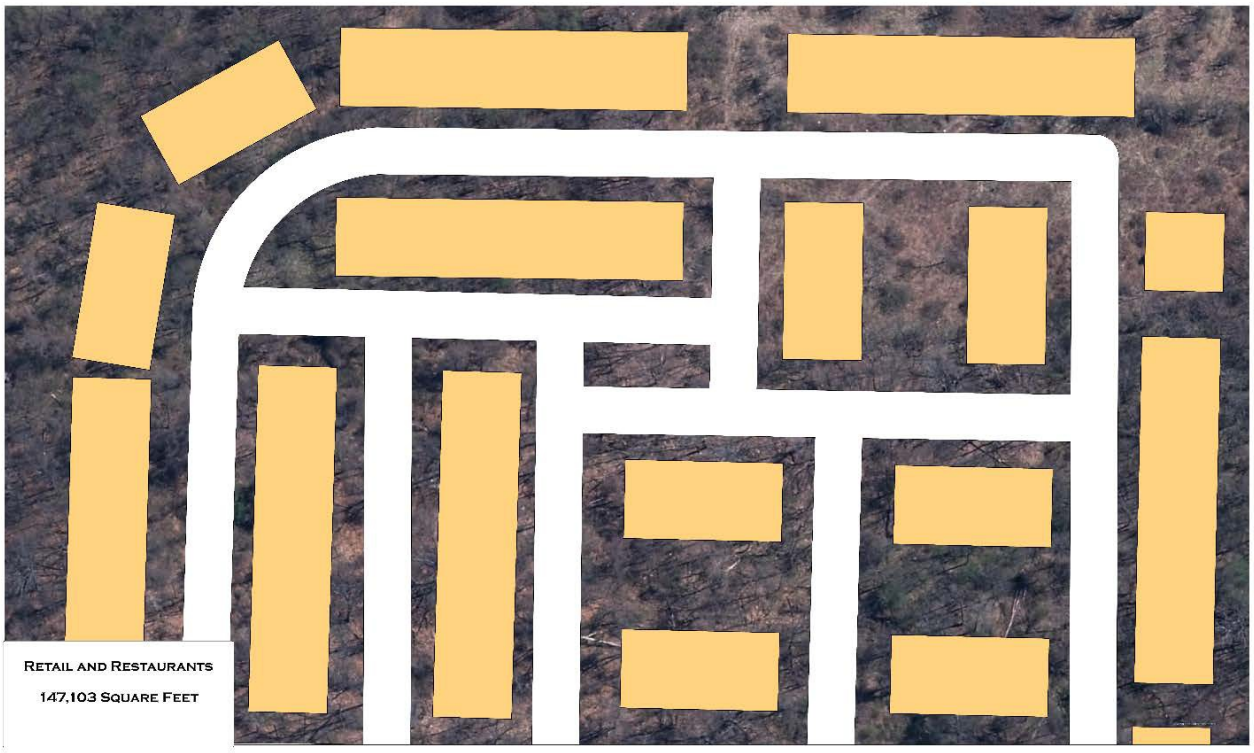
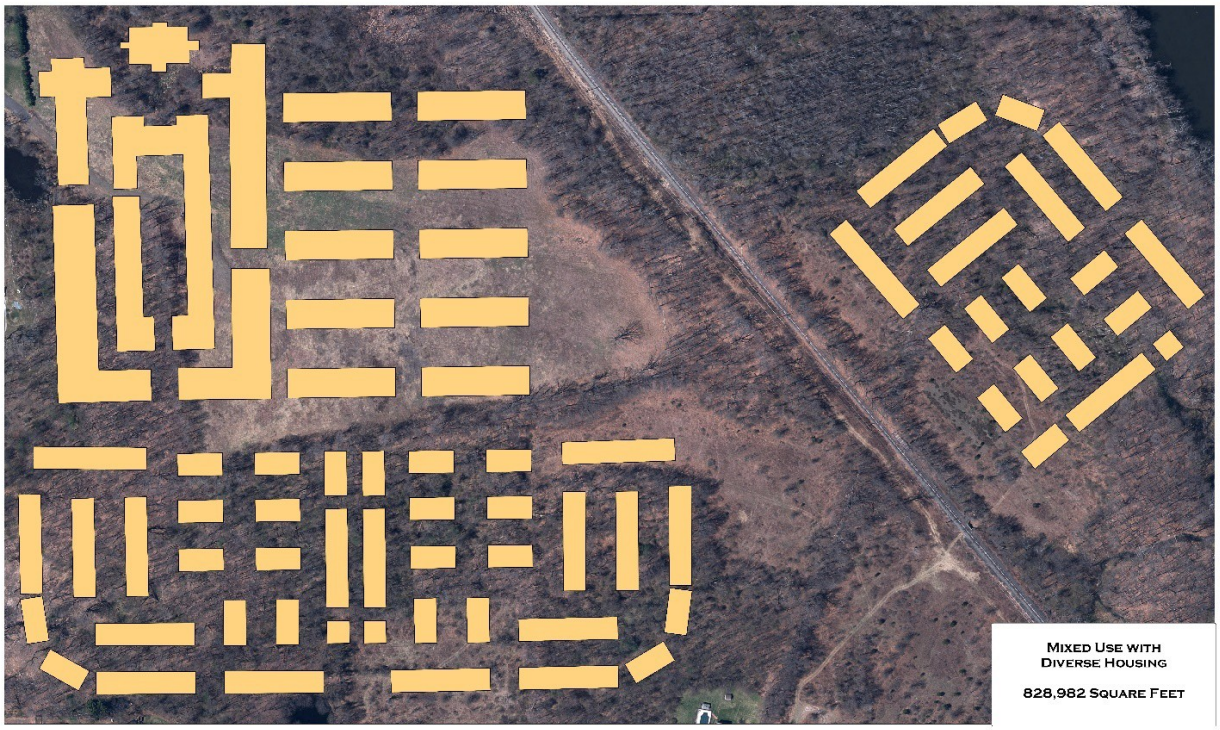


Figure 25: Ag Multi-Use Complex

Figure 26: Creative Economy, Outdoor Recreation

Figure 27: Mixed Use, Diverse Housing



6.0 RECOMMENDATIONS & NEXT STEPS

The Corridor Study is the first phase of three envisioned to achieve the objective of sustainable economic investment in the Town:

Table 13: Phases of Sustainable Economic Investment

Phase 1: Development Corridor Study	Phase 2: Environmental Review, Land Use Regulations, and Permitting	Phase 3: Infrastructure Design and Construction
• Determine Market Potential; • Identify Opportunities and Constraints; • Leverage Document to Apply for Grants to Support Phase 2	• Engage the Public • Detail Existing Environmental Conditions • Potential Impacts and Mitigation Measures • Outline Steps for Economic Investment • Adopt Land Use Regulations • Leverage Documents to Apply for Grants and Low-Cost Financing to Support Phase 3	• Construct in Public-Private Partnership the Infrastructure Required to Support Envisioned Economic Investment

Phase 1: Current Status

The Corridor Study includes a visionary look at potential transformational sites with related development scale and sector analysis across the 17K Corridor and Orange County Airport area with other strategic and adjacent parcels. If the Town embraces the zoning recommendations, then Phase 2 is a very comprehensive public engagement process to secure property owner and public input, resulting in the establishment of environmental thresholds and rezoning.

Phase 2: Generic Environmental Impact Statement and Re-Zoning

The second phase envisioned to follow the Corridor Study immediately is the conduct of a broad environmental review under the State Environmental Quality Review Act (SEQRA) and the National Environmental Policy Act (NEPA) to identify current conditions, envision community- supported economic investment through robust public participation as well as public benefits, determine potential environmental impacts on a broad scale and document mitigation measures to reduce or eliminate potential impacts paves the way to sound, sustainable development in the corridor is envisioned.

In the second phase, the preparation of a Generic Environmental Impact Statement (GEIS) under SEQRA establishes thresholds for future projects under which the SEQRA process for applications for site plans and subdivisions is streamlined and focused on mitigation measures for site specific impacts. Robust public participation will be conducted in scoping as well as Draft and Final GEIS review. This creates value in that it ensures that projects are aligned with community vision while providing developers and end users a predictable time frame for local approvals. With respect to NEPA, pursuit of United States Economic Development Administration (EDA) grants necessitate conduct of NEPA.

The key deliverables of the first phase Corridor Study are the market demands identified and the recommended land use regulations needed to meet the market potential. The GEIS is envisioned to incorporate an environmental review of the recommended land use regulations such that at the conclusion of the GEIS, the zoning code may be amended to include visionary zoning for the Corridor. Specific zoning recommendations are incorporated in **Appendix D**.

Phase 3: Infrastructure

In conducting the GEIS and Rezoning, the scale of development and a list of targeted sectors will be finalized. Upon the completion of this process, infrastructure is yet to be addressed. Grants will be secured by the Town, with prior planning positioning the sites for soon to be available federal and state infrastructure dollars. All indications are that communities prepared for economic development and creating value-added employment will be well positioned for this financial support. Ideally, the balance of infrastructure costs not supported by grants or low-cost financing is supported by the private sector beneficiaries of the infrastructure.

As this planning and approval process is completed, and the remaining investment for infrastructure defined, the end product will be predictable and dynamic in the marketplace. With sites ready to accommodate the community's priorities, success will be achievable through valued added job creation driven by significant private investment.

INTENDED RESULTS

The Corridor Study has been prepared in consideration of multiple benefits including coordination with the Town's Comprehensive Plan Update and positioning the IDA for grant opportunities to support next steps.

While the Comprehensive Plan will outline the community's vision for the entire Town, the Corridor Study objectively assesses the market potential of a limited area of the Town.

By having both processes proceed simultaneously, ultimately, the Town Board will be well informed to make decisions governing land use in the Town, and in particular, in the Corridor Study to meet the objectives of the community to preserve important land as open space or for residential and community-scale land uses while focusing economic investment that provides the tax revenue to support quality of life in appropriate locations.

Timeframes for Next Steps

Ideally, the Corridor Study will position the Town of Montgomery IDA ("the IDA") to support the preparation of grant applications through the State of New York's Consolidated Funding Application (CFA) in 2021. The timing is critical because applications such as those for Community Development Block Grant (CDBG) funds required conduct of a public hearing prior to submitting the CFA application. A study completed well in advance of potential future grant application deadlines provides ample time for notice and conduct of a public hearing that will support high scoring for that aspect of a CDBG application. In addition to CFA grant opportunities, it may be possible to attract grant funding from the local power utility and from the State and Municipal Facilities fund which is offered through the area's representatives to New York State Government.

An overall, aggressive timeframe is provided in **Table 13**:

Table 14: Funding Next Steps

Action	Funding Sources	Timeframe
Generic Environmental Impact Statement and Rezoning	Empire State Development Strategic Planning and Feasibility	Mid-Summer 2021
Infrastructure Improvements	Empire State Development Capital Investment Water Infrastructure Improvement Act State Revolving Fund Community Development Block Grant	Mid-Summer 2022

In the meantime, while the GEIS, Re-Zoning and infrastructure improvements are advanced, there are a number of proactive steps that can be undertaken to ensure the community is ready to leverage the hard work outlined in the Next Steps towards the desired future. These include conducting a workforce development and attraction initiative and preparation for site marketing.

Workforce Development and Attraction

While the Town has land base that will be attractive for development with the proper zoning, this Corridor Study documents a critical workforce challenge. It is crucial that the County, Town and IDA use the time throughout the GEIS, re-zoning and infrastructure implementation rollout to develop and implement a workforce development plan to attract talent and create a local and regional pipeline.
Partnership between the IDA, Town, County and educational institutions including Orange County Community College and other institutions of higher education is key to the success of such an effort.

Site Marketing

A top priority of the IDA should be to secure partnerships for advancement of site readiness and approvals. Marketing of sites will be limited until some level of site predictability is achieved and supporting infrastructure with capacity expansion plans solidified with a detailed timeframe. However, marketing materials, community demographics, and any other relative information required in a site selection process can be prepared during this timeframe.

As this strategy is advanced, it is highly recommended that the IDA work to build relationships with site selection and commercial real estate professionals. Establishing a network of those responsible for identifying and evaluating sites for future projects, targeted towards those with expertise in the identified sectors of preference, is essential for success. At the time in the process that site predictability is better defined, site information can be shared with an established network of critical partners.

Another action to be taken by the IDA is to identify companies in New York City and other regional locations in the Northeast that connect to the targeted sectors, and work to build relationships as well, such that when sites are ready, a direct marketing strategy is in place and ready to advance.

Concurrently, the IDA should work to identify the best development sites and work with site ownership to determine willingness to sell and define the role owners wish to hold in the development of their land. A variety of partnerships and structures should be considered, including but not limited to site options, price guarantee, sole development, public/private partnership or establishment of a private LDC to lead the development.

Lastly, it is strongly recommended that the IDA continue to build local and regional partnerships. County and town boundaries are transparent to quality regional development. Find the valued relationship, company or talented opinionmaker that can help achieve the ultimate goal of transforming the local economy, then build the relationship with the goal of setting a path towards improving the business climate, creating efficiency and bringing the most value to the community.

APPENDIX A: PROJECT KICKOFF SUMMARY

To: **Montgomery IDA Corridor Study Working Group***

Conor Eckert, Jeff Crist, Matt Stoddard, Brian Maher, John Revella, Bill Fioravanti, Alan Sorenson

From: **Kevin Schwenzfeier, Mary Beth Bianconi, Sandy Mathes**

Copy: **IDA Board of Directors**

Date: **August 17, 2020**

Re: **Corridor Study Kick-Off Meeting Summary**

* A representative from the villages of Montgomery and Maybrook were invited and welcome to join the Working Group but not in attendance at Kick-Off Meeting

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Initial Considerations:

1. This study will be objective
2. The study will recognize the desire to retain farms, open space and community character AND the need for a diverse economy
3. The study will communicate development options other than warehousing
4. UTEP policy is a strong tool that can be utilized to generate strategic and innovative development; it will place the Town in the driver's seat rather than the developers
5. The study and the Comprehensive Plan work together but remain separate initiatives
6. It is vital for the future of the Town that it capitalize on economic investment for the benefit of its residents and property owners

Process to Move Forward:

1. The Corridor Study is the first step in a three-step process with the second step being a Generic Environmental Impact Statement (GEIS) which will lead to the third step which is Infrastructure Design and Construction with this step-by-step process resulting in Town control over development.
2. The intent of the process is to create market ready sites as opposed to shovel ready so that the developers work in partnership with the municipality to fund infrastructure improvements
3. The process envisioned involves planning, environmental review, public input and land use regulation puts the Town in a ready mode to capture desirable investment opportunities
4. Data Gathering is the first step occurring in Sept through Oct which involves compiling all publicly available information and filling in the gaps missing from the public records
5. The Corridor Study timeline will coincide with the Comprehensive Plan's timeline; this plan may serve as a standalone appendix to the Comprehensive Plan if desired by the Town Board
6. The market analysis and paths to desired investment will be the primary focus of the Corridor Study report and include public input to inform the process

7. The market analysis and industry sector opportunities are forward-looking, so the Town's current underlying zoning will not be considered; this study is designed to gain an understanding of the Town's ultimate investment potential across innovative industry sectors
8. The Corridor Study will not investigate warehousing potential per se; the existing zoning and conditions already allow and encourage warehousing
9. Industry sectors that may be investigated include back office, technology and the innovation economy, and boutique manufacturing among others
10. The Corridor Study will become a public document, and if adopted by the IDA and endorsed by the Town, it will be used to leverage funds from Empire State Development and others to conduct next steps, including a GEIS

Current Questions, Initiatives, and Indicators to Investigate for the Corridor:

1. What does the land allow for vs what does the market demand?
2. Imperative to look towards the future: city flight, rising school enrollment, regional migration, real estate investment, etc.
3. What are the needs of the potential users the Town is looking to attract? (e.g. Back office – computer processing centers – high water demand for cooling, etc.)
4. What are the limiting factors are for each type of potential use throughout the corridor?
5. How do the development desires of the Town relate to the current land use codes?
6. What needs to change in the code to allow for the realization of the corridor vision?
7. What are the hard numbers for the change in utility usage during pandemic for bedroom communities?
8. Opportunities for community benefit may be identified as part of this visioning process including concepts such as rail trails, parks, recreation, etc.
9. Working with property owners to take advantage of a potential new road east of Bracken Road to International Blvd:
    a. Reduce commercial traffic on 17K
    b. Provide development opportunities in non-ag, non-open space, non-residential areas
    c. Public lands could be utilized in combination with willing private property owners
10. Potential for increased publicly accessible recreational opportunities without added tax burden through public-private partnerships such as concessions to operate desired facilities (e.g. indoor fields for soccer and lacrosse, indoor ice for recreational skating, hockey, figure skating, etc.) – community benefit
11. Nascent development plans to be researched and confirmed, such as the Galaxy Development
12. Limitation of sewer capacity for the Town; decentralized solution may be most cost effective and sustainable

13. Scott's Corners Area could be a hub for infrastructure extension
14. Review the Route 17K Gateway Zoning that was proposed but never adopted
15. Measures to be included in the land use code to result in Low Impact Design (LID) for less impactful development
16. Leakage analysis will inform what amenities the Town and Villages are providing and what amenities are lacking
17. Concept that the Town plans the infrastructure, but developers fund the actual construction to reduce tax payer burden and result in greatest benefit to property owners

Refining the Study Area Boundaries:

- Initial concept of boundary is 17K between the Village of Montgomery and the Newburgh town line along with the airport and its surrounding parcels.
- Refined concept for east of the Village of Montgomery:
    - All of the parcels fronting on Route 17K except for the schools.
    - All parcels fronting along the entire length of Stone Castle Road to Route 52.
    - All parcels east of Old Neelytown Road, Goodwill Road, and Route 208, between Route 17K and I-84, to the Newburgh town line except the church and Goodwill Village property
    - To the north, include all large contiguous parcels with sufficient access to main roadways
- West of the Village:
    - Parcels to the north and east of the County Airport on the east side of the Wallkill
    - Industrial parcels to the south within the existing airport overlay zoning district.
    - Wallkill River to the west

Refining the Study Area Boundaries:

- Distribution of Kick-Off Meeting Summary to IDA Board and continuing public education regarding the purpose of the Corridor Study
- Creation of a Corridor Study boundary map; digital distribution; confirmation by Working Group
- Data gathering and initial market analysis
- Next Working Group meeting targeted for third week of September

APPENDIX B: INSPIRATION BOARDS

Potential Investment on the Route 17 Corridor

Use Sticky Notes to Tell Us Your Thoughts

Research & Development Park

Rural Office Park

Manufacturing Campus

Innovation Campus

Live/Work/Play District

Residential Complex

Live/Work Commerce Park

Flex-Space Tech Park

Suburban Business Park

Business Campus

Boutique Manufacturing Center

Mixed Use Rural Design

APPENDIX C: ZONING RECOMMENDATIONS

Town of Montgomery Zoning Recommendations

The analysis conducted in the Corridor Study reveals the need to modify the zoning in the corridor study area to better reflect the community's vision for economic investment, capture market demands and aid the planning and zoning boards in effective decision making. Key considerations regarding the zoning in the corridor study area are:

- There are a total of 23 zoning districts made up of 18 base districts and 5 overlay districts. Of the districts, 14 are included within the use table, while 16 are included within the dimensional table. This disparity may be the result of having too many districts to manage.
    - The number of zoning districts for a town the size of Montgomery is excessive, particularly when the vast majority of the land in Town is appropriately within the RA-0.5 Residential Agricultural District.
    - This means the 22 districts apply to a very small area of the Town, resulting in fragmentation of land uses and lack of cohesive development pattern and opportunities.

- There are a total of 128 individual use categories that are either permitted, permitted through special exception, permitted as accessory or disallowed within each district.
    - Many of these are not actually categories of uses, rather a list of specific businesses within broader use categories which is overly prescriptive.
        - For instance, stores, banks, personal service shops (hair salon, barber, or dry cleaner), restaurants, taverns, and health clubs are listed as uses; however, these are all in fact 'retail' and from a land use perspective, have a common intensity of use and should be regulated as 'retail' rather than each individual business.
        - Features that require additional standards and conditions such as drive-thru lanes associated with banks and restaurants should be handled through special permits rather than being listed as separate uses.
    - Listing businesses rather than broad uses categories challenges property owners and the planning board to create and approve good projects as it is unclear how to accommodate good businesses that do not fit into the lists.
    - It appears that rather than considering broadening the use category to retail, commercial, industrial/manufacturing, etc., in the face of new, desirable proposed businesses, the Town has added business types to the list of uses, creating a prescriptive zoning code that stifles innovation and is not reflective of changes in business types or practices.

- The complex zoning code with numerous permitted districts and permitted uses is not protective of the community. Given the recent approval of several large warehouses, it is reasonable to assume these uses must be allowed as of right. Rather, there are no zoning districts where such uses are allowed as of right.
    - A straightforward code that provides performance standards for the location and scale of land uses that may have significant community impacts is needed to ensure development of any nature occurs in appropriate settings with safeguards for the community.

- There are numerous instances of spot zoning and one single parcel zone. Spot zoning is the selective zoning of a single parcel that is not contiguous to other portions of the district in order to allow for a use in an area it would otherwise not be permitted. Single parcel zoning is where only one parcel in the entire town carries a particular zoning designation.

  - Spot zoning leads to incompatible uses in close proximity to each other, creating negative impacts to the community.
  - Single parcel zoning for anything other than the highest intensity, high impact uses that require substantial limitation to avoid major community impacts renders property very difficult to develop because to be successful, most land uses rely on being situated within an area of similar uses with shared resources and commercial attraction.
  - It appears that much of the spot zoning in the existing code was the result of zoning a parcel for the land use at the time the zoning code was adopted, rather than zoning all the parcels in a cohesive area into one zone with the future in mind. The Town can adopt new zoning that is visionary with respect to land uses while allowing existing, underlying land uses to continue under defined conditions, such as continued ownership, operations, or other measures.

- Strip and Split Parcel Zoning
  - Strip zoning is where a zoning district is created in a strip or buffer around a landmark or features, such as a commercial zoning district that is bounded as 200' from the centerline of a roadway. Split Parcel Zoning is where a large parcel is arbitrarily divided by zoning districts in a possible attempt to permit 'mixed use'.
    - Zoning that splits parcels leads to varying interpretation of allowed uses, frustrating land owners, developers and the planning and zoning boards alike.
    - This type of zoning prevents proper site planning as following setbacks for each zoning district prevents compact, environmentally sensitive design and unnecessarily increases impervious surfaces and infrastructure costs.

- An unintentional result of the current, onerous approval process is the inhibition of quality development by local property owners and developers
  - While there is great desire in the community to see more grassroots and homegrown economic investment, only massive corporations have the time and money to get through the process.
  - Changes to the zoning code to provide cohesive categories of land uses with whole parcel, contiguous zoning to encourage efficient, cost effective site design will result in greater potential for local owners and developers to invest in the land uses most desired by the community.

As a result of these observations, the Zoning Recommendations resulting from the Corridor Study are:

1. Retain the RA-0.5 – Residential Agriculture zoning designation throughout the Town with the exception of the corridor study area
   a. This will protect and preserve the rural landscape and open space and encourage continued agricultural land uses that are important to the fabric and character of the community.
   b. Consider reviewing spot zoning within the RA-0.5 area
      i. Eliminate spot zones to the extent possible to avoid incompatible land uses adjacent to each other.
      ii. Consider measures to allow existing land uses that are non-conforming with the RA-0.5 area to continue under conditions such as continued ownership or operations. This protects value for current owners and allows for the eventual amortization of non-conforming land uses to RA where appropriate.

2. Reduce the remaining 18 zoning districts to two, namely the Airport Commerce Integration District and the Route 17K Corridor Economic Enhancement District as further described herein.
    a. The Airport Commerce Integration District is proposed as a traditional zoning district with permitting uses and accessory uses with the goal of facilitating a robust development cluster.
        i. It is envisioned that while logistics focused, the district would incorporate a variety of economic sectors that would build off of the success of one another.
        ii. The goal is to create an area to support a cluster of inter-dependent uses that are most successful when allowed to develop in closer proximity to one another.
    b. The Route 17K Corridor Economic Enhancement District, the overall concept of which is to allow a diverse mix of residential, commercial, industrial, and community uses that lead to a healthy, charming, and vibrant economic culture within the Town of Montgomery. The diversity will be apparent not only in the type of development, but also in the scale of development. The vision is that this district will embrace the principles of new urbanism and performance standards for higher-value uses. This proposed district is envisioned to have a traditional underlying structure of permitted uses, with performance standards for higher intensity land uses. New Urbanism principles primarily focus on human-scaled form rather than the function of the development; whereas the clustering of smaller buildings with a diversity of uses that blends into the neighborhood character is valued over the separation of those uses. Performance standards ensure the location and scale of development is protective of community character.
        i. The proposed district will incorporate performance zoning. Performance zoning applied to specific locations is effective in regulating the type of development and where it will occur. Development will be directed away from inappropriate areas through the use of stringent performance criteria, while other criteria can encourage development to locate in more appropriate areas.
        ii. Performance zoning is an alternative to conventional zoning. Rather than establishing specific area and bulk standards to govern development, performance zoning regulates the design and location of a land use based on the characteristics of a particular site to support development. The intention of performance zoning is to increase the range of uses that may be permitted and at the same time, provide additional control over the effects of the land uses. Landowners and developers are provided greater flexibility on how to meet performance zoning standards.
        iii. Performance zoning offers a number of advantages when property executed, including:

            - Ensures that a proposed use is appropriate for the specific character of a site
            - Balances the level of development that the site can accommodate with minimizing negative impacts on the environment;
            - Promotes natural resource protection and can limit adverse impacts on neighboring properties;
            - Directs development to areas served by sewer and water service;

- Establishes objective and quantifiable performance standards based on actual site conditions;
- Performance zoning recognizes the carrying capacity of a site within the development process;
- Provides the developer with the flexibility to respond to changing market conditions;
- Encourages the development of wider range of housing types;
- Reduces potential conflicts between incompatible land uses; and
- Provides more discretion to the private sector in making decisions regarding the location of land uses.

iv. While beneficial, performance zoning is a change from traditional zoning and does require a degree of technical expertise on behalf of the municipality to evaluate and monitor land uses.

3. Evaluate the purpose and function of the various overlay districts within the Town and update, revise, delete or consolidate these as appropriate.

These recommendations are aimed at preserving the character of the Town of Montgomery while providing robust economic opportunities to encourage local and national investment at appropriate locations, scale and design aesthetic. Details regarding the two proposed districts are as follows:

Airport Commerce Integration District

The overall concept of the Airport Commerce Integration District strives to attract uses that support and enhance multi-modal transportation logistics. The locational advantage of this zone is attributable to both the existing development surrounding and relating to the Orange County Airport as well as the area's proximity to highway, air, and rail transportation. A logistics development cluster will not only allow for the integration of transportation, but also for information flow, materials handling, production, packaging, inventory, warehousing, and security.

This district is intended to be limited in its variety of uses in order to facilitate a robust development cluster. It is envisioned that while logistics focused, the district would incorporate a variety of economic sectors that would build off of the success of one another. The goal is to create an area to support a cluster of inter-dependent uses that are most successful when allowed to develop in closer proximity to one another.

The district encompasses all of the real property owned by Orange County surrounding and including the Orange County Airport. It includes all properties to the east of the Airport to Beaver Dam Road, excluding existing residential neighborhoods. It also includes parcels to the south of the Airport that are adjacent to the County-owned lands and any that border on Interstate 84. The district does not include any parcels that are within the Villages of Montgomery or Maybrook. Furthermore, the district includes all parcels south of I-84 along Neelytown Road and up to the rail line north of Maybrook.

In addition to logistics, the envisioned integrated economic sectors within this district include: Professional, financial, and business services; Environmental services and product development; Co-working space and business incubation; Regional workforce training; Media and entertainment services and production; and Workforce housing.

While there are no uses explicitly exclusive to this district, the zone is intended to provide a place for permitted types of development which desire to build to a larger scale. The district will not only provide space for these types of uses, but will also incorporate bulk locational elements by type of use. This will allow for a smaller-scale mix of uses to be interspersed throughout the zone in order to more efficiently utilize the available land.

Potential Permitted Uses:

- Airport
- Heliport
- Parking Lot or Garage
- Research Institute or Laboratory
- Printing and Publishing Plant
- Warehousing
- Wholesale Business
- Light Manufacturing
- Research and Development
- Private Offices
- Bus Passenger Shelter
- Public Utility Facility
- Fire Station or Governmental Building
- Railyard
- Hotel
- Vocational School
- Workforce Housing

Potential Accessory Uses:

- Customary accessory use, building or structure
- Day-care facility
- Fuel storage
- Liquefied petroleum gas (LPG) or other fuel storage for on-site use
- Signs pursuant to § 235-13
- Restaurant, cafeteria attached to a primary use
- Retail store attached to a primary use
- Temporary sand and gravel removal operations as part of the primary use
- Veterinarian office or breeding kennel

Airport Commerce Integration District

Route 17K Corridor Economic Enhancement District

The overall concept of the Route 17K Corridor Economic Enhancement District is one that allows for a diverse mix of residential, commercial, industrial, and community uses that lead to a healthy, charming, and vibrant economic culture within the Town of Montgomery. The diversity will be apparent not only in the type of development, but also in the scale of development. The vision is that this district will embrace the principles of new urbanism and performance standards for higher-value uses. New Urbanism principles primarily focus on human-scaled form rather than the function of the development; whereas the clustering of smaller buildings with a diversity of uses that blends into the neighborhood character is valued over the separation of those uses.

The Route 17K Corridor Economic Enhancement District is bound to the south by Interstate 84, to the east by the Montgomery town line, to the west by Beaver Dam Road and The Village of Montgomery, and to the north by parcels, on average, greater than two-thirds of a mile away from Route 17K. The District also includes all of the parcels adjacent to the full length of Sand Castle Road.

The economic sectors within the district include all of the following: Professional, financial, and business services; Environmental services and product development; Co-working space and business incubation; Regional workforce training; Media and entertainment services and production; Diverse housing mix; Events center and hospitality; Recreation, open-space, and preservation; Mixed-use; Agricultural multi-faceted complex; Technology-driven research and manufacturing; Creative economy connected to venues and housing; Restaurants and consumer goods; Data processing and storage; Renewable energy research and development; Regional athletic complex; and Biological and pharmaceutical scaled manufacturing.

Potential Permitted Uses:

- 1 and 2 Family Residential
- Multi-Family Residential
- Assisted Living Facility
- Accessory Dwelling Unit
- Planned Adult Community
- Campground
- Commercial Retail
- Light Industrial
- Park, Playground, or Recreation Area
- Eating Establishment or Tavern
- Custom Workshop
- Parking Lot or Parking Garage
- Research Institute or Laboratory
- Printing and Publishing Plant
- Wholesale Business
- Light Manufacturing
- Research and Development
- Mixed Use Commercial/Residential
- Private Offices
- Bus Passenger Shelter
- Public Utility Facility
- Fire Station or Governmental Building
- Railyard
- Hotel
- Golf Course
- Public Library, Museum, Theater, or Community Center
- Cemetery
- Hospital
- College or University
- Funeral Home
- Day-Care Facility
- Place of Worship
- Shopping Center
- Nursery School
- Vocational School
- Workforce Housing
- Agriculture or Horticulture

This is proposed as a unique district within the Town of Montgomery in that it includes the widest variety uses yet requires developers to select properties that meet certain performance criteria in order to accommodate more intensive types of land uses. The types of uses that require performance criteria are those associated with Agricultural Complexes, Logistics Centers, Biological and Pharmaceutical Manufacturing Facilities, Data Processing Centers, and Regional Athletic Complexes.

District-Wide Development Criteria:

- Utilizes Low Impact Development Techniques
- Designed for Personal Interaction and Walkability
- Respects Desired Community Character
- Protects Open Space and Critical Resources
- Minimizes Carbon Footprint and Utilizes Renewable Materials
- Contributes to Economic Vitality and Diversity
- Utilizes Local Inputs and Resources

Data Processing Facility Performance Criteria:

- Contiguous 10-Acre Minimum Parcel Area
- 2-Mile Maximum Distance from a Primary Electrical Transmission Line
- 2-Mile Maximum Distance from the NYC Aqueduct
- Possesses Accessible Frontage on a State or County Highway

Agricultural Complex Performance Criteria:

- Contiguous 50-Acre Minimum Parcel Area
- Maximum of 25% Building Coverage
- Possesses Accessible Frontage on a Public Street

Logistics Center Performance Criteria:

- Contiguous 25-Acre Minimum Parcel Area
- Possesses Accessible Frontage on a State Highway
- Maximum ½ Mile from an Interstate Highway or an Airport

Biological/Pharmaceutical Manufacturing Facility Performance Criteria:

- Contiguous 25-Acre Minimum Parcel Area
- Maximum of 25% Building Coverage
- Possesses Accessible Frontage on a State or County Highway

Regional Athletic Complex Performance Criteria:

- Contiguous 100-Acre Minimum Parcel Area
- Maximum 25% Building Coverage
- Possesses Accessible Frontage on a State Highway
- 1-Mile Minimum from a Village Boundary

Route 17K Corridor Economic Enhancement District