

CHADAKOIN RIVER CENTRAL/EASTERN

BROWNFIELD OPPORTUNITY AREA NOMINATION STUDY

JULY 2014

FINAL



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Appendix A: Site Profiles

SUPPORTING DOCUMENTS (ON COMPACT DISC)

Document 1: Community Participation and Visioning Plan

Document 2: Public Meeting Presentations

Document 3: Steering Committee Meeting Minutes

Document 4: SEQR Documentation

Document 5: Site Descriptions

Document 6: Economic and Market Analysis

Document 7: Ecological Conditions and Living Infrastructure Framework

Document 8: Urban Design Analysis

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INTRODUCTION AND EXECUTIVE SUMMARY

The City of Jamestown has identified the area along the Chadakoin River in the Central and Eastern portions of the City as critical to the revitalization of the community. It is believed that the development of this area as a vibrant waterfront will lead to improved prosperity throughout the City. Therefore, the City has targeted this area for redevelopment planning studies to guide that transformation.

To that end, through the efforts of the City of Jamestown and the Jamestown Urban Renewal Agency (JURA), the New York Department of State (NYSDOS) and New York Department of Environmental Conservation (NYSDEC) awarded the City of Jamestown a Brownfield Opportunity Area (BOA) grant. This grant program provides municipalities and community-based organizations with the resources to develop a vision for brownfield redevelopment and to prepare the implementation strategies that are necessary to realize the successful reuse of these properties.

The Pre-Nomination Study for the proposed City of Jamestown Chadakoin River Central/Eastern BOA was completed in October 2008 and was the first of three steps in the BOA program. The Pre-Nomination Study (Step 1) involved the selection of an area in need of cleanup and redevelopment and provided a data set that included basic information about characteristics of the BOA and the brownfields within the given area. The Pre-Nomination Study also provided a preliminary analysis and recommendations to facilitate the revitalization of the proposed BOA and support the City's intentions to participate in subsequent stages of the BOA program. Lastly, the Pre-Nomination Study began the environmental review process within the context of New York State's State Environmental Review Act (SEQRA) by initiating the Environmental Assessment Form (EAF).

This Report describes the work associated with the second step of the BOA program. The Nomination Phase (Step 2) involves the gathering of more detailed information about the Study Area, evaluates this information, and includes:

- Advancement of the community vision created during the Step 1 BOA project
- Coordination of additional public outreach to obtain updated information from the community and help inform the various analyses conducted during the project
- Analysis of the economic and market trends affecting the area
- Evaluation of the ecological conditions
- Thorough review of the utility and transportation infrastructure
- Evaluation of urban design considerations
- Identification and characterization of brownfield, underutilized, and vacant properties
- Prioritization of identified sites

Following the approval of this document, the City of Jamestown will advance into the third and final step of the BOA program, which is the Implementation Strategy and/or Site Assessments (Step 3). This phase includes strategic planning to define the specific activities necessary to achieve the successful redevelopment of high-priority sites and the area as a whole. Where appropriate, site assessments will be used to evaluate the environmental conditions of targeted brownfields sites and determine the remedial efforts necessary, if any, to make priority sites shovel-ready.

To meet the environmental review process within the context of New York State's State Environmental Review Act (SEQRA), the City has separated the process into two actions: the first action will be undertaken during this part of the BOA Program and the second will be undertaken during the next phase (Step 3) of the BOA Program. As part of the current step of the project, the City will approve the Nomination Report as its action (Supporting Document 4). Under the subsequent step of the BOA Program, a Generic Environmental Impact Statement (GEIS) will be prepared. The GEIS will examine the impacts of the proposed recommendations made in Steps 2 and 3 of the BOA Program in detail. The BOA Program has been designed such that the combination of the Nomination Document (Step 2 deliverable) and the Implementation Strategy document (Step 3 deliverable) form the GEIS (as shown in Figure 1). The City of Jamestown, acting as Lead Agency, will issue a Findings Statement that details the rationale for its decisions regarding potential adverse environmental impacts, if any, associated with the proposed redevelopment plans.

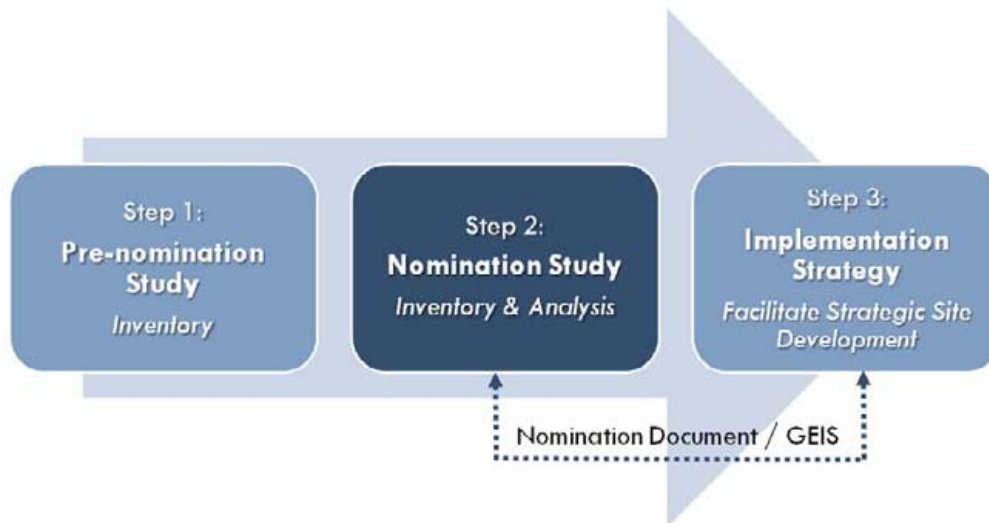


Figure 1. NYS BOA Process

The performance of this Nomination Study is part of a larger planning project for which the City of Jamestown bundled three separate but related planning projects into one project to maintain consistency and foster the most efficient use of grant funds. The three separate grant projects include this Step 2 BOA project in the central and eastern portion of the City (henceforth referred to as the Chadakoin River Central/Eastern Study Area), a Step 1 BOA project in the western portion of the City (henceforth referred to as the Chadakoin River West Study Area), and a Local Waterfront Revitalization Program (henceforth referred to as the LWRP) that encompasses the areas included in the two BOA projects.

EXECUTIVE SUMMARY

The presence of brownfield and other underutilized sites along and near the central and eastern sections of the Chadakoin River has been a challenge for the City of Jamestown. Large sections of the City of Jamestown were utilized for manufacturing and other industrial purposes due to the abundant natural resources in the area as well as the availability of water and waterpower associated with the Chadakoin River. However, as the economy has shifted, the industrial base of Jamestown has shrunk and left behind numerous abandoned sites. These unproductive and unattractive properties drain the vitality of the community. However, these sites also present tremendous opportunities, as most are already served by utility and transportation infrastructure. The remediation and reuse of these sites will help to revitalize the economy, create new jobs, and develop areas along and near the River for public recreation and greenspace.

The City joined the New York State Department of State's Brownfield Opportunity Area (BOA) program to inventory the many brownfield, underutilized, and vacant sites, analyze existing conditions and market needs, and create a series of realistic revitalization projects. In October 2008, the City completed the Step 1 Pre-Nomination Study for the Chadakoin River Central Study Area. In 2011, the City received additional funding to advance the Step 1 findings by preparing this Step 2 Nomination Study.

The goals for this Study were to develop a plan to encourage redevelopment, cleanup and reinvestment in the area; enhance the City's connection to the Chadakoin River; and to generate jobs and tax revenues. The community's goals for the area were identified through various outreach activities, and included making the riverfront a regional destination; increasing tourism; improving the connectivity and integration of the River and park system with the local neighborhoods, Downtown, and Chautauqua Lake; and addressing the redevelopment of brownfield and underutilized sites located throughout the City.

This planning project involved a thorough analysis of the Study Area in order to put the proposed plans in a framework, allowing the plans to take advantage of the City's current conditions and opportunities. The following summarizes the inventory and analysis of existing conditions (with particular focus on the discussion of assets and constraints to development), identifies key findings of the economic and market analysis, and highlights the priority revitalization projects and recommendations.

Existing Planning Initiatives

- The City of Jamestown and Chautauqua County possess multiple Studies and Plans which document existing conditions and provide recommendations on topics including waterfront revitalization, economic development, urban design, housing, streetscapes, bicycle and pedestrian infrastructure, and the natural environment.

Demographics

- The Chadakoin River Central/Eastern Brownfield Opportunity Area has a rich industrial history.
- The City of Jamestown's population is 31,134 (2010 Census) and the population has significantly decreased over the past 60 years, although the rate of decrease has slowed.
- The population within the Study Area has relatively low income and educational attainment coupled with high unemployment.
- The population's economic conditions limit its spending power, reducing the potential for growth.

Employment Overview

- Health care and social services provide a large portion of jobs within the City
- Manufacturing, while diminished since the middle of the 20th Century, makes a very significant contribution to employment in the City.
- Tourism plays a limited role in the employment base of the City, although opportunities exist to increase opportunities for residents and visitors.

Land Use and Zoning

- The Study Area consists of 643 acres of land within the central and eastern portions of the City and has been broken into three subareas based on land use and other characteristics:
 - **Downtown District** – Contains the Downtown Core (including the ice arena, the Lucy-Desi Center, the restored Erie Railroad Station, and the Civic Center), portions of the emerging *Medical Corridor* (including the Jamestown Area Medical Associates facility, the Cancer Care of WNY Center, and the WCA Hospital which is just outside of the Study Area), and the riverfront Electric Generating

- Station, a mix of commercial businesses and several shopping centers, light industrial facilities, residential uses and churches.
- **Industrial Heritage Corridor** – Contains a mixture of commercial, residential, many vacant former industrial, and a few active industrial properties. Portions of the Dahlstrom complex at the western end of this sub area recently underwent demolition, paving the way for future redevelopment.
- **East End Industrial Area** – Contains a mix of modern/semi-modern manufacturing facilities that are largely utilized with some vacant properties and limited commercial and residential uses.
- The zoning code was last updated in 1998 and consists of 11 zoning districts including various residential, commercial, manufacturing, and land conservation districts and one historic overlay district.
- Additionally, Urban Design Guidelines were prepared in 2006 for five areas of the City, which include a portion of the **Downtown District**.
- The Downtown Jamestown Development Corporation (DJDC) and Jamestown Renaissance Corporation (JRC) aid in development / revitalization efforts in the Downtown
- Portions of the Study Area are located within multiple Economic Development Designation Districts which aim to provide financial help/incentives and technical assistance for revitalization efforts. These Districts include Environmental Zones, HUD Renewal Communities, Small Business Administration Historically Underutilized Business Zones, and the Local Waterfront Revitalization Program.

Brownfield, Underutilized, and Vacant Sites

- The BOA Nomination Study Area includes 53 sites categorized as brownfield (26), underutilized (26), and vacant (1) sites.
- The 53 sites occupy about 117 acres and are assessed at over \$12.5 million
- Strategic Sites include the Trolley Building, Harrison/Briggs Block, the Vacant Parcels on Foote, the CCIDA and United Lumber Sites, a series of contiguous brownfields on the north side of River Street, and the Dahlstrom Site.

Transportation and Infrastructure

- The City's transportation and utility infrastructure was designed to support a larger population and more commercial and industrial users.
- The transportation and utility infrastructure is in relatively good shape and has excess capacity.
- The River and elevated railroad require the use of bridges and underpasses, making pedestrian access and traffic flow challenging in several places.
- The Riverwalk Trail System is a growing asset and its expansion should be a continual priority of the City.

- The low-cost power and district heating/cooling provided by the BPU present opportunities to foster new development.

Land Ownership

- Over 27 percent of the BOA Nomination Study Area is publicly owned, and numerous brownfield, underutilized, and vacant sites are at least in part publically owned.

Natural and Cultural Resources

- Numerous Parks and the Riverwalk Trail System are located within the **Downtown District** while the **Industrial Heritage Corridor** does not contain a public park and the **East End Industrial Corridor** only contains one park which is too heavily wooded and steep for public use.
- The Chadakoin River bisects the Study Area and generally flows west to east. The River is navigable by man-powered (kayaks, canoes) and shallow keeled boats from Chautauqua Lake down to the Warner Dam, although navigation is difficult, if not altogether impossible in some areas due to the presence of a number of low bridges. Beyond the Warner Dam the River is mainly un-navigable due to shallow waters, low head dams, and low bridges.
- The edges of a much larger wetland complex dip into the Study Area south of Chadakoin Park.
- Natural shorelines and floodplain interactions are limited throughout the Study Area, especially within the **Downtown District**
- The Spiny Softshell Turtle, a New York State Species of Special Concern, was observed in multiple locations throughout the Study Area.
- Although only two sites within the Study Area are listed in the National Register of Historic Places, the City's Historical Marker Program and the Fenton History Museum and Research Center's self guided walking tour highlight many sites of local historic significance.
- Large portions of the Study Area are located within Archeological Sensitivity Areas as identified by New York State. The State Historic Preservation Office (SHPO) should be consulted prior to any ground disturbing or excavation within these sensitive areas.

Economic and Market Analysis

- The economic and market analysis has identified the following potential areas of growth:
 - New or adaptive re-use housing units
 - Medical/social service office space
 - Professional office space
 - Restaurant/café/bar space
 - Industrial, light industrial and high tech potential

Based on the work described above, the following recommendations were put forth in the Nomination Document:

- Based on the City's and Community's goals and vision and based on the analysis of existing conditions, opportunities, constraints, and needs, policy and buildable project recommendations were created to revitalize the entire Study Area.
- The proposed projects were classified into the following broad categories:
 - Economic Development
 - Quality of Life Improvements
 - Natural/Environmental Enhancements and Improvements
 - Additional Strategies
- Priority projects and recommendations include:
 - Advancing the *Downtown Riverfront Opportunity Zone* Concept
 - Establishing a Riverfront Tourism Attraction
 - Advancing the *Medical Area Opportunity Zone* Concept
 - Developing/Redeveloping Strategic Brownfield, Underutilized, and Vacant Sites
 - Continuing the Development a Continuous Riverwalk
 - Increasing Public Access/Connection to the Waterfront
 - Advancing the *McCrea Point Opportunity Zone* Concept (including the Creation of a Educational and/or Interpretive Center)
 - Providing Waterfront Programming
 - Establishing Development/Riparian Transition Zones
 - Creating a Self-Sustaining Brownfield Program

Following the completion of this Nomination Study, the City intends to apply for a grant to complete the next step (Implementation/Assessment Phase) of the BOA Program in order to advance these and other opportunities.

ORGANIZATION OF THE REPORT

The report is organized according to the outline provided by the New York Department of State (NYSDOS) for all BOA funded projects:

An **Executive Summary** provides a brief review of the City's participation in the Brownfield Opportunity Area Program, discusses the City's and community's goals regarding this Study, summarizes the inventory and analysis of existing conditions, identifies key findings of the economic and market analysis, and highlights the priority revitalization projects and recommendations.

Section 1. Project Description and Boundary follows the executive summary and is divided into four sections:

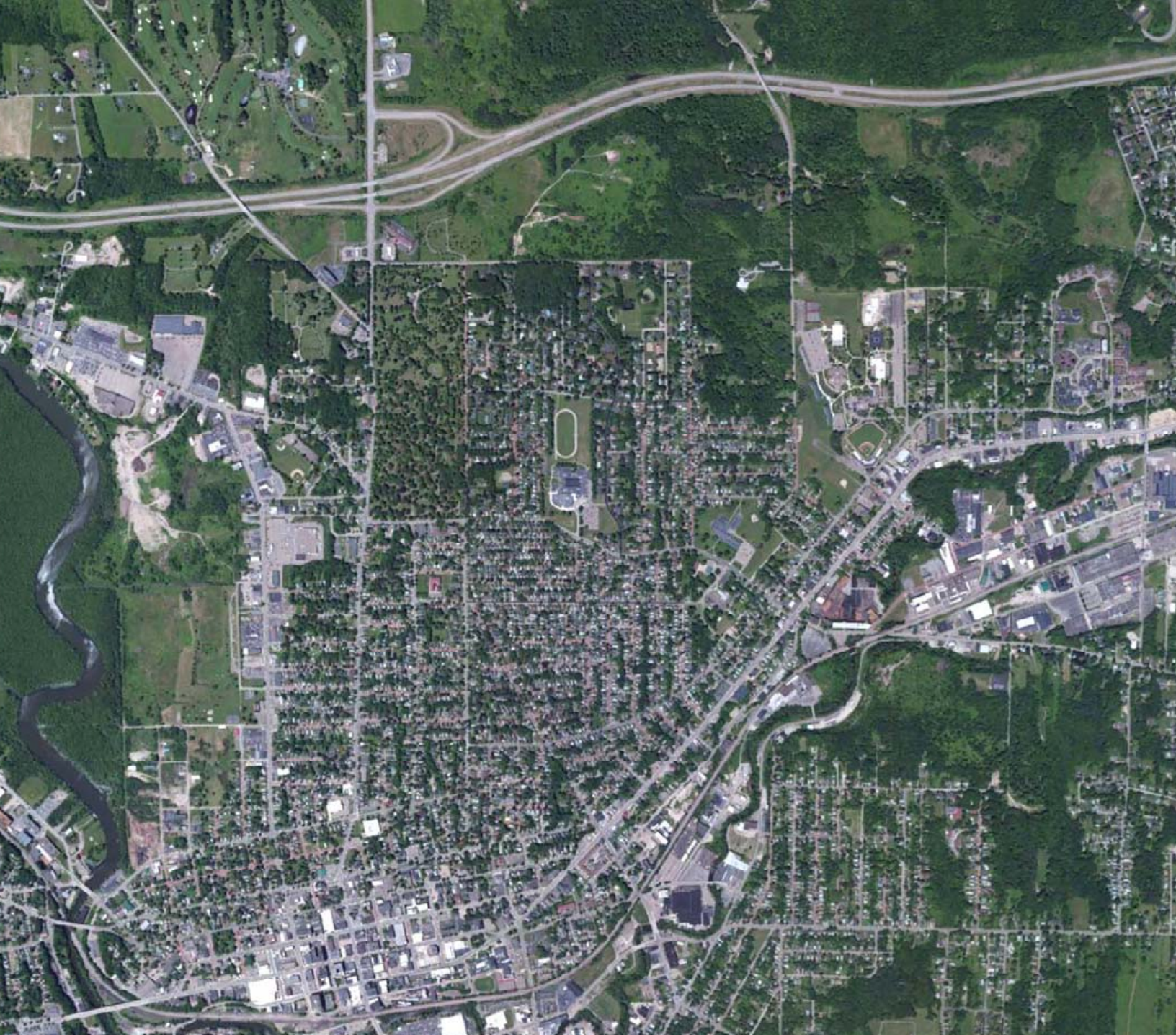
1. Lead Project Sponsor and Project Team – A general description of the relationship between the City of Jamestown and other partners.
2. Project Overview and Description –A general overview of the Study Area and opportunities for redevelopment.
3. Community Vision, Goals and Objectives – Community and economic development needs proposed to be addressed by the Plan.
4. Project Boundary Description and Justification – A narrative describing the BOA boundaries and justification of those boundaries.

Section 2. Public Participation Plan and Techniques to Enlist Partners outlines the steps taken to promote the Chadakoin River Central/Eastern BOA, summarizes the meetings held which provided opportunities for public input, and discusses efforts to consult property owners, business persons and other organizations on the Plan.

Section 3. Inventory and Analysis of the Brownfield Opportunity Area provides a background of the community, inventories and evaluates existing conditions, and analyzes economic and market trends. The analysis includes a review of the following characteristics:

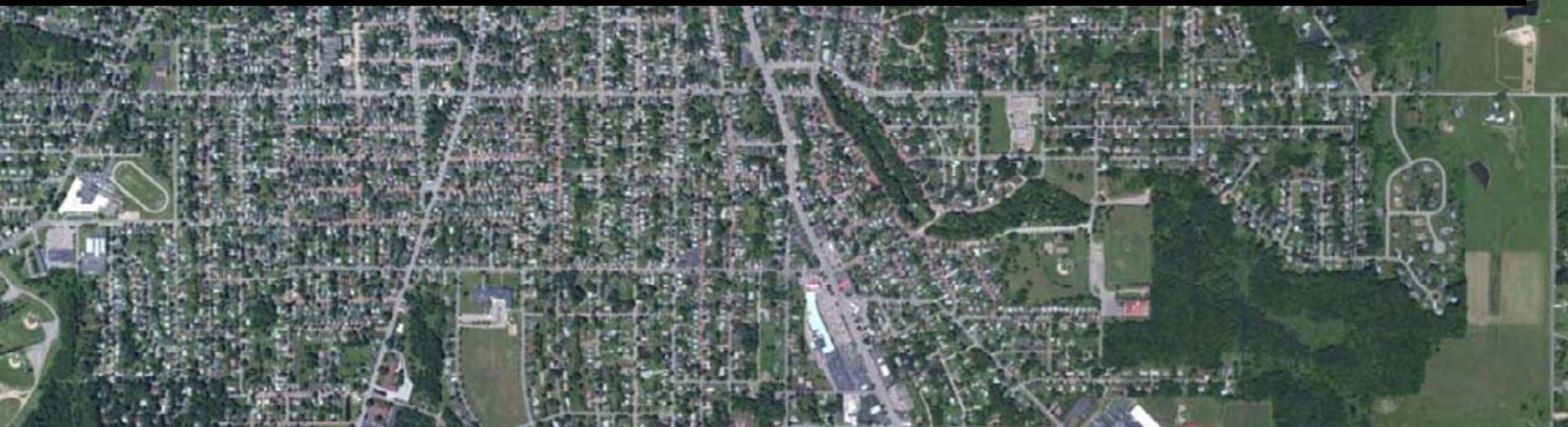
- Community and Regional Setting (including Existing Planning Initiatives, Demographics and Employment Indicators, and BOA Sub Areas)
- Existing Land Use and Zoning (including land use, zoning, and special zoning and economic development designation zones)
- Brownfield, Underutilized, and Vacant Sites
- Strategic Sites
- Transportation and Infrastructure Systems
- Land Ownership
- Natural and Cultural Resources (including parks and open spaces and water-based resources)
- Historic and Archeological Resources
- Economic and Market Analysis

Upon completion of a review of the existing conditions in the Chadakoin River Central/Eastern Study Area, the **Summary Analysis, Findings, and Recommendations** (Section 4) documents reuse and redevelopment opportunities in the BOA, provides a series of key recommendations, and identifies specific activities to be conducted in the Implementation Phase.



SECTION 1

PROJECT DESCRIPTION AND BOUNDARY



SECTION 1. PROJECT DESCRIPTION AND BOUNDARY

The Project Description and Boundary section provides a general overview of the Chadakoin River Central/Eastern Study including the lead agency responsible for the report, a brief characterization of the BOA, a review of the community's vision for the area, and description of the BOA boundaries.

LEAD PROJECT SPONSOR AND PROJECT TEAM

The City of Jamestown and the Jamestown Urban Renewal Agency managed the overall project and were the main points of contact with the Department of State. Vincent DeJoy, Director of Development at the Jamestown Urban Renewal Agency, provided leadership for the project.

The City worked closely with the project consultants including the lead consultant, LaBella Associates, as well as subconsultants Greenman-Pedersen, Inc.; Biohabitats; W-ZHA; Harris Beach; and Goody Clancy. The project consultants assisted the City with steering committee (Waterfront Advisory Committee) meetings, public meetings, and the development of this Plan.

Other key team partners were represented on the Waterfront Advisory Committee, and included:

- NYS Department of Environmental Conservation
- NYS Department of State
- Jamestown Renaissance Corporation
- Gebbie Foundation
- Department of Public Works
- Board of Public Utilities
- Chautauqua Watershed Conservancy
- Jamestown Community College
- Other concerned and active citizens including local developers, business owners, and property owners

PROJECT OVERVIEW AND DESCRIPTION

The Chadakoin River Central/Eastern Study Area is located in the City of Jamestown, New York. The City of Jamestown is located in southeastern Chautauqua County in the westernmost portion of New York State. The Towns of Busti, Ellicott and Kiantone and the Villages of Falconer and Celoron border the City of Jamestown. The City is located approximately one mile west of the eastern end of Chautauqua

Lake, and is bisected by the Chautauqua Lake Outlet, also known as the Chadakoin River. The City is approximately 75 miles south of Buffalo, New York and 53 miles east of Erie, Pennsylvania. Figure 2 illustrates the regional context of the City of Jamestown while Figure 3 illustrates the Study Area context.

The City of Jamestown is accessible from the east and west from the Southern Tier Expressway (Interstate 86). NYS Route 60 and US Route 62 are the primary north/south corridors into the City of Jamestown, and state roads provide access to northern Chautauqua County and the Greater Buffalo area. The Chautauqua County Airport is located three miles north of Jamestown, and provides regular commuter service to Pittsburgh, Pennsylvania. The Western New York and Pennsylvania Railroad (WNYP) operates a short line railroad that passes through the Jamestown BOA. Although rail service in Jamestown is limited to freight, passenger rail service is available in nearby Erie and Buffalo.

The City of Jamestown (2010 population of over 31,000 people) is the largest municipality in the County and therefore acts as the County's economic, educational and cultural center. The manufacturing and health care related entities located in and around the City provide a significant number of jobs for County residents. SUNY's Jamestown Community College (located within the City) is also a significant employer and its campus provides cultural amenities such as concerts and performing arts to area residents.

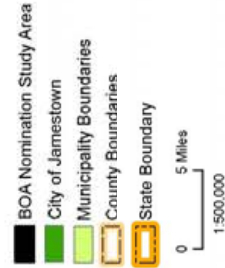
The Chadakoin River Central/Eastern Study Area as shown in Figure 5 is located primarily along the Chadakoin River from McCrea Point Park to the eastern municipal boundary (which is coincident with Tiffany Avenue). The Study Area is comprised of 1,295 parcels that occupy 643 acres. The majority of sites in the western portion (**Downtown District**) of the BOA are commercial, retail, and office properties while the eastern portion (**Industrial Heritage Corridor** and **East End Industrial Corridor**) contains predominately industrial properties. Despite the City's rich historical heritage, few buildings within the BOA are historically significant.

Within the Chadakoin River Central/Eastern Study Area there are 53 identified brownfield, underutilized, and vacant sites comprised of 146 individual properties. Many of these sites are abandoned industrial properties located along the Chadakoin River in prime development spots. The brownfield, underutilized, and vacant sites range in size from less than an acre to over 13 acres and include industrial sites, auto shops, row buildings, gas stations, and vacant lots and buildings.

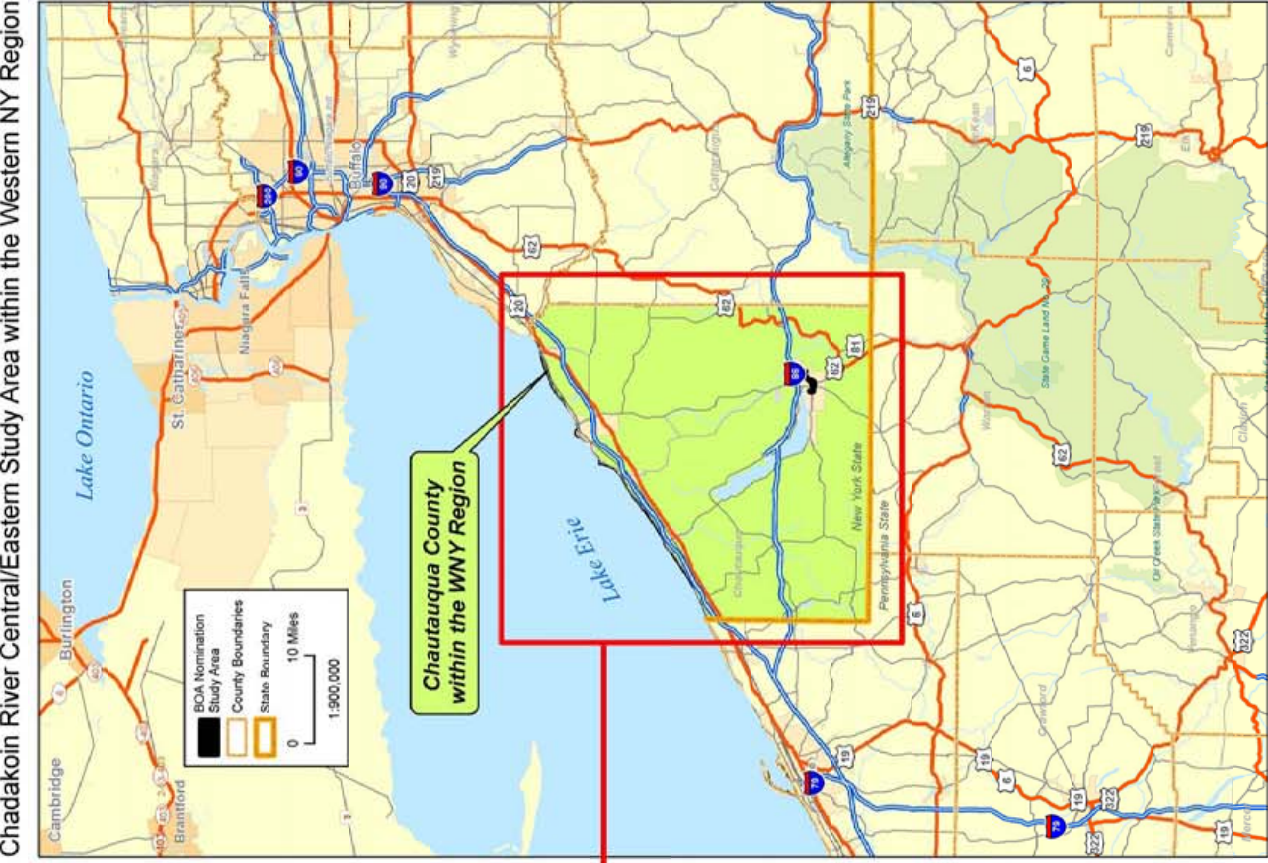
Chadakoin River Central/Eastern Study Area within the Western NY Region



Chadakoin River Central/Eastern Study Area within Chautauqua County



This map was prepared for the City of Jamestown, the Jamestown Urban Renewal Agency, and the New York State Department of State with funds provided through the Brownfield Opportunity Areas Program.
 File: Jamestown Urban Renewal Agency\01251\Growth\BOANominationMAP 2012.14 12 Community Context.mxd



Chautauqua County within the WNY Region

CITY OF JAMESTOWN
BROWNFIELD
OPPORTUNITY AREA
NOMINATION STUDY

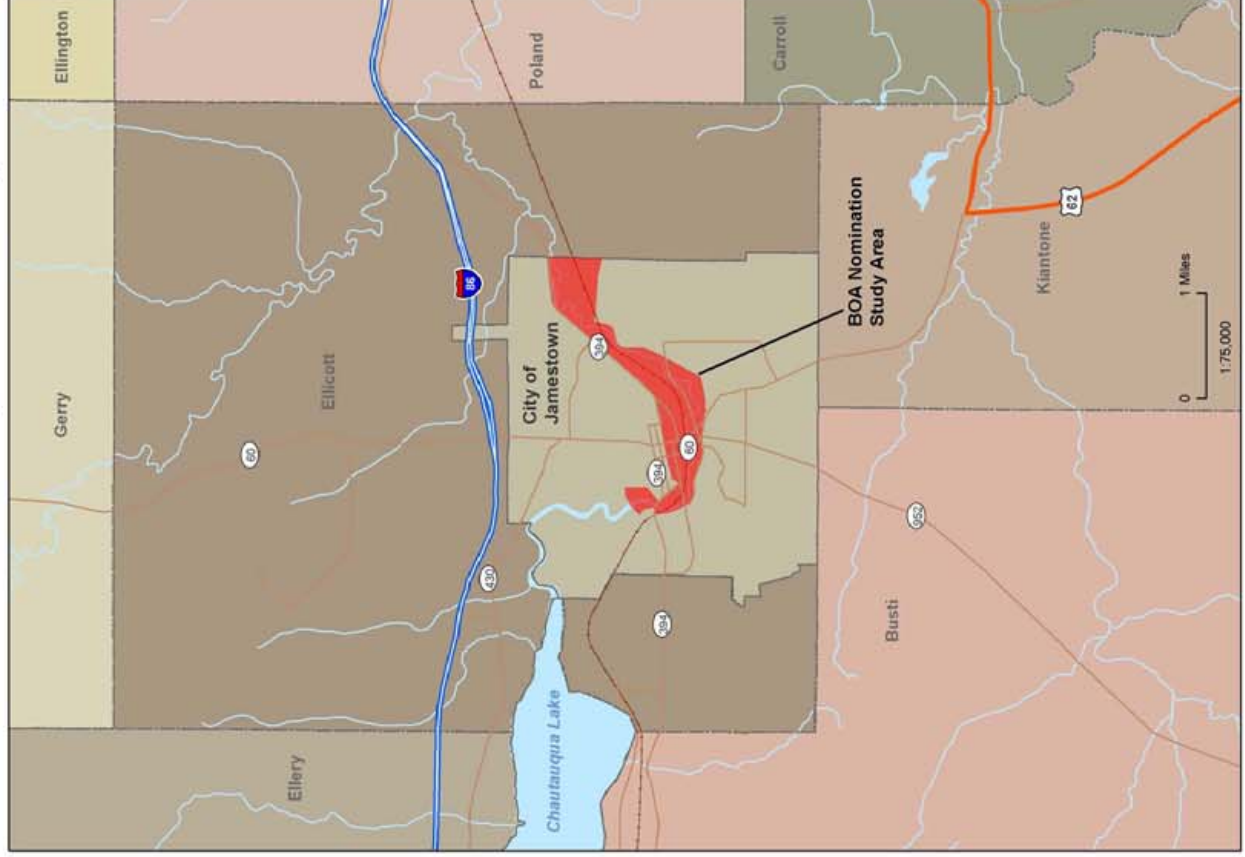
Community Context Map

Labela Project No:
212251

Figure 2. Community Context
Map

Sources:
 1. Original BOA Shapefiles provided by the City of Jamestown - Edited by Labela to include the BOA Nomination Study Area
 2. Regional Roads: ERI Regional Major Highways Shapefile
 3. Water: ERI Regional Water and River Shapefile
 4. Municipal and County Boundaries
 Census data Shapefiles

Chadakoin River Central/Eastern Study Area Relative to Adjacent Towns



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CITY OF JAMESTOWN
BROWNFIELD
OPPORTUNITY AREA
NOMINATION STUDY



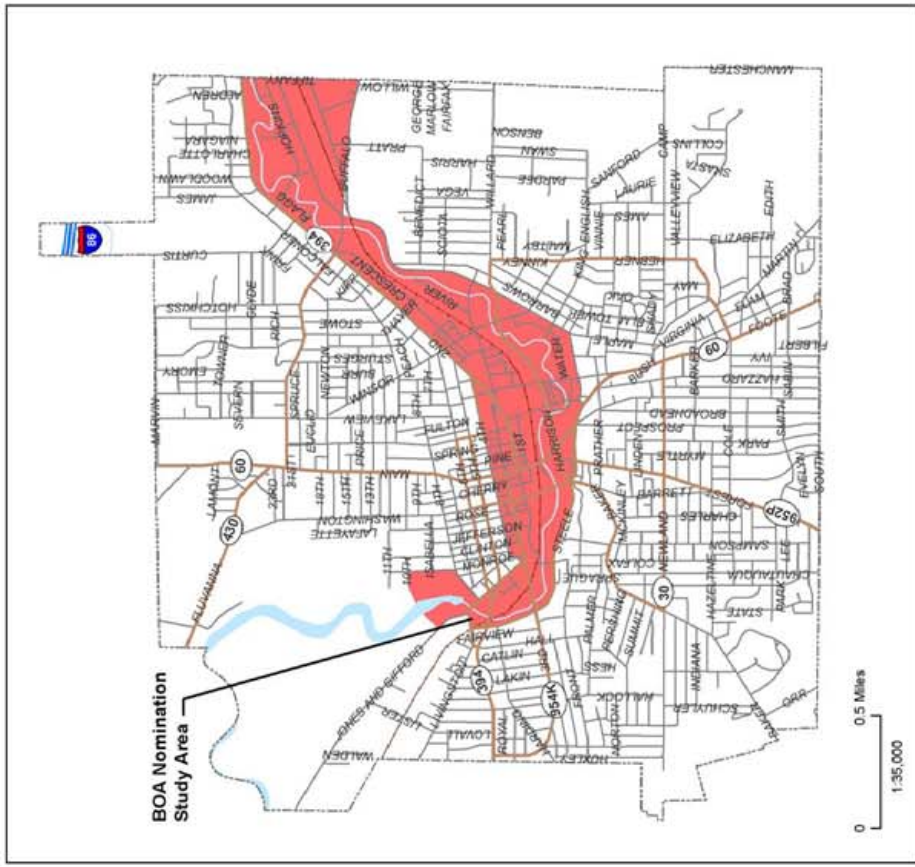
Study Area Context Map

- BOA Nomination Study Area
- City/Town (Fill Colors Vary)
- Limited Access
- Highway
- Major Road
- Railroads
- Water Bodies

Sources:
1. Original BOA Shapfiles provided by the City of Jamestown - Edited by Labelle to reflect steering committee revisions
2. Esri, ArcView, Roads, Esri Urban Highways
3. Water: ESRI Regional Water and River Shapfiles
4. Railroads: Boundaries, Census data
5. Shapfiles

Labelle Project No:
212251

Figure 3. Study Area Context Map



Chadakoin River Central/Eastern Study Area within the City of Jamestown

This map was prepared for the City of Jamestown, the Jamestown Urban Renewal Agency, and the New York State Department of State with funds provided through the Brownfield Opportunity Areas Program.
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The development opportunities for many BOA sites are high. Many of the sites have attributes that developers look for when selecting a site, including:

- **Transportation Infrastructure** – most brownfield, underutilized, and vacant sites are directly on a City or State roadway and have good access to I-86.
- **Available Infrastructure** – Water, sewer, gas, electric and other utilities with sufficient capacity are available at the sites.
- **Waterfront Locations** – Many of the sites are on or near the Chadakoin River waterfront.
- **Rail Access** – Many of the sites have access to the regional freight rail transportation system.
- **Economic Development Assistance** – the City of Jamestown, the Jamestown Renaissance Corporation, the Downtown Jamestown Development Corporation, and the Chautauqua County Industrial Development Agency will assist developers and companies with financial incentives, site information and facilitation of project approval.

While the Economic and Market Analysis in Section 3 of this Study outlines the feasible uses for sites within the BOA, some of the opportunities for redevelopment identified in the section include the expansion of health care and social services, an increase in the number of retail and service (i.e., restaurant) offerings, the construction of condominium-style housing Downtown, and the infill of former industrial properties with new, smaller-scale industries.

The scope of this project therefore is to identify opportunities and constraints within the BOA to develop a comprehensive, area-wide master plan to advance the redevelopment of brownfield, underutilized and vacant sites. Redevelopment opportunities and constraints will be identified by evaluating the development suitability of sites or areas based on zoning, land use, access, infrastructure, building or site conditions, level of contamination, proximity of natural/cultural resources and the findings of Economic and Market Analysis.

COMMUNITY VISION, GOALS AND OBJECTIVES

The input received from the Waterfront Advisory Committee meetings, public meetings and stakeholder meetings generated a set of goals for the project. Goals, opinions, and desires expressed at the meetings from various individuals and organizations were practical and consistent with many of the goals expressed in the City's previous planning efforts. The most common goals expressed during the community participation process fell into the following categories:

- **Make the Riverfront a Regional Destination** – This planning process and the resulting development will help change the view of the Riverfront, making it a destination and the centerpiece of the City rather than something ignored as in years past. The Riverfront should draw residents and tourists alike by offering amenities, shops, and a variety of uses. Riverwalk should be extended, the navigable section of the River should be increased, connections to open space should be improved, and programming such as concerts and other events should occur at the River. However, water quality and debris were concerns for many and must be addressed.
- **Increase Tourism** – While a few suggested the need for one major tourism attraction, most suggested the need to build on existing draws such as the Lucille Ball-Desi Arnaz Center, the Audubon Society, the Ice Arena, and the many City events (holiday parades, Gus Macker, etc.). Most also agreed that if the City could attract residents to the events and destinations, then tourists would follow. Tourism initiatives should celebrate the City's industrial heritage while taking advantage of the eco-tourism opportunities associated with the Chadakoin River, Chautauqua Lake, and associated wetlands complex, and the presence of ecological-related entities such as the Roger Tory Petersen Institute and the Jamestown Audubon Center and Sanctuary.
- **Improve Connectivity and Integration** – Local neighborhoods need to be connected to both the Downtown and the Chadakoin River but currently are not. Chautauqua Lake needs to be connected to the Downtown via the River while the River as well as the new Jamestown Community College housing needs to be integrated into the urban fabric. A common concern was the need to address the barrier presented by the separation of the River and Downtown by the railroad.
- **Address Brownfield and Underutilized Sites** – The consensus was that too many vacant spaces and obsolete buildings exist throughout the City, including within the Study Area. Due to the negative effects these properties have on surrounding property values and perceptions of the area, there is a need to demolish and clean up these blighted properties. The space should then be assembled to create larger parcels for development or converted to greenspace. Suggested strategic actions include expanding Riverwalk in both length and reach into the local neighborhoods, encouraging waterfront related uses and development, carefully taking advantage of the greenspace/wetlands within the Chadakoin Outlet (which is just outside the Study Area boundary), and creating new greenspace which can be easily maintained.

Through the various public and Waterfront Advisory Committee meetings and stakeholder interviews conducted during this planning study as well as through similar efforts conducted during previous studies within the City, a vision has been developed for the Chadakoin River Central/Eastern Study Area.

VISION STATEMENT

City of Jamestown Chadakoin River Central/Eastern Study Area

We see a diverse community of City and County residents with good paying, value-added jobs at a variety of commercial and industrial businesses within the Study Area. Previously underutilized and brownfield properties have been reclaimed for residential, commercial, industrial, mixed-use, and greenspace developments. Manufacturing sector industries are clustered along River Street and in the eastern section of the City while new commercial developments have flourished in the downtown and along Harrison Street. The Medical Corridor is established and provides a direct link between the hospital and the Riverwalk Center. Access to the Chadakoin River has been strengthened in various portions of the Study Area, and the community has strong connections to points east and west via a network of trails. Development along the River has been completed in a manner that provides access and draws residents and tourists with increased retail and entertainment opportunities.

PROJECT BOUNDARY DESCRIPTION AND JUSTIFICATION

The Waterfront Advisory Committee initially met in the spring and summer of 2012 to review and discuss various scenarios for potential Chadakoin River Central/Eastern Study Area boundaries. The pros and cons of continuing with the prior Pre-Nomination boundary versus extending the boundaries to include other areas of the City were discussed at length.

Three alternative boundaries emerged from the discussion (Figure 4). The first alternative was to continue with the previously defined Pre-Nomination boundary. This alternative was quickly discarded as it did not include large industrial areas in the eastern section of the City. The second alternative included this eastern industrial section. The third alternative expanded the second alternative boundary to include McCrea Point Park and the Weitsman Scrapyard. The reasoning behind this inclusion was to plan for and provide a waterway entrance to the Downtown.

The final, agreed upon Chadakoin River Central/Eastern (BOA Nomination) Study Area boundary is shown in Figure 5. The boundary is defined as:

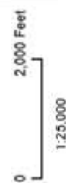
Starting from the intersection of 8th Street and Fairmount Avenue, the boundary trends in a southeasterly direction along Fairmount Avenue; thence northeast along 4th Street; thence east along 4th Street; thence northeast along 2nd Street to the eastern City limits (Tiffany Ave). The boundary continues south along the eastern City limits (Tiffany Ave) to Buffalo Street; thence west along Buffalo Street; thence southwest along Allen Street; thence south along Institute Street; thence west along Washington Street; thence west along Steele Street; thence north along Whitley Avenue; thence east along Fairmount Avenue; thence northwest along Jones and Gifford Avenue approximately 850 feet to a point in line with the southeast boundary of the Resource Center parking lot (Parcel 387.05-2-28). The boundary continues in a northeasterly direction along the southeast boundary of the Resource Center parking lot to a point in the center of the Chadakoin River; thence northeast along a canal and extended to 10th Street; thence east along 10th Street; thence south along Monroe Street; thence southwest along 8th Street to the intersection of 8th Street and Fairmount Avenue.

The boundary encompasses 643 acres and contains 1,295 parcels. This boundary was selected to primarily encompass industrial properties surrounding the Chadakoin River and railroad, commercial properties in the Downtown Core and Brooklyn Square, and key waterway entrance sites to the Downtown. The eastern boundary is formed by the corporate limits of the City of Jamestown, and the western boundary is coincident with the southern boundary of a separate BOA Study Area (the Chadakoin River West BOA Pre-Nomination Study Area). The northern and southern boundaries are formed by primary streets beyond which most properties are utilized to the appropriate levels. Many underutilized and abandoned industrial properties are present within these boundaries along both the railroad tracks and the Chadakoin River.



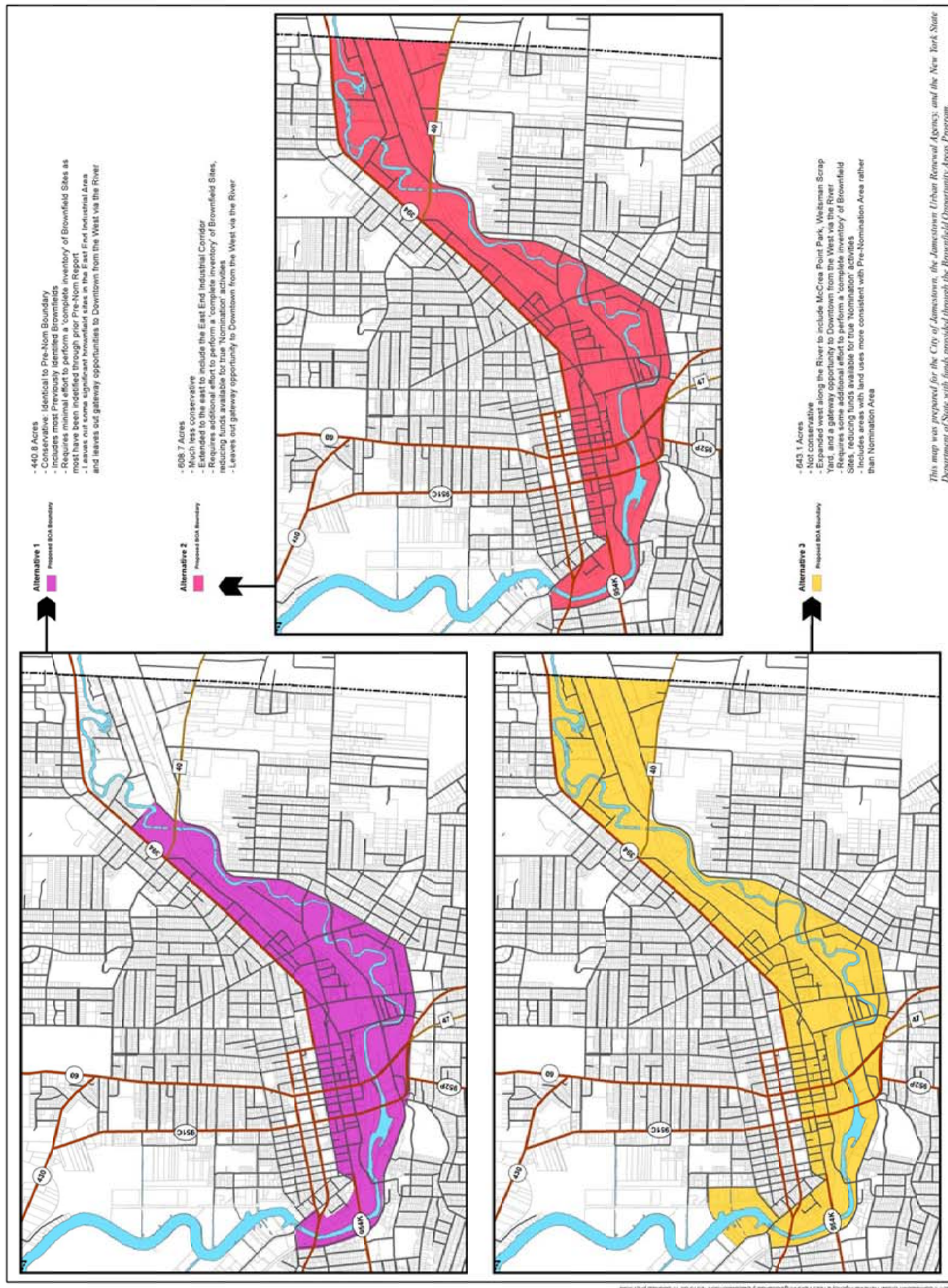
Sources:

1. Original BOA Shapellie provided by the City of Jamestown
2. Alternative BOA Shapellies created by LaBella for discussion by the steering committee
3. Water and Road Shapellies provided by Chautauque County and BPU



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Figure 4. Alternative Boundaries Map



This map was prepared for the City of Jamestown, the Jamestown Urban Renewal Agency, and the New York State Department of State with funds provided through the Brownfield Opportunity Areas Program.

Boundary Map

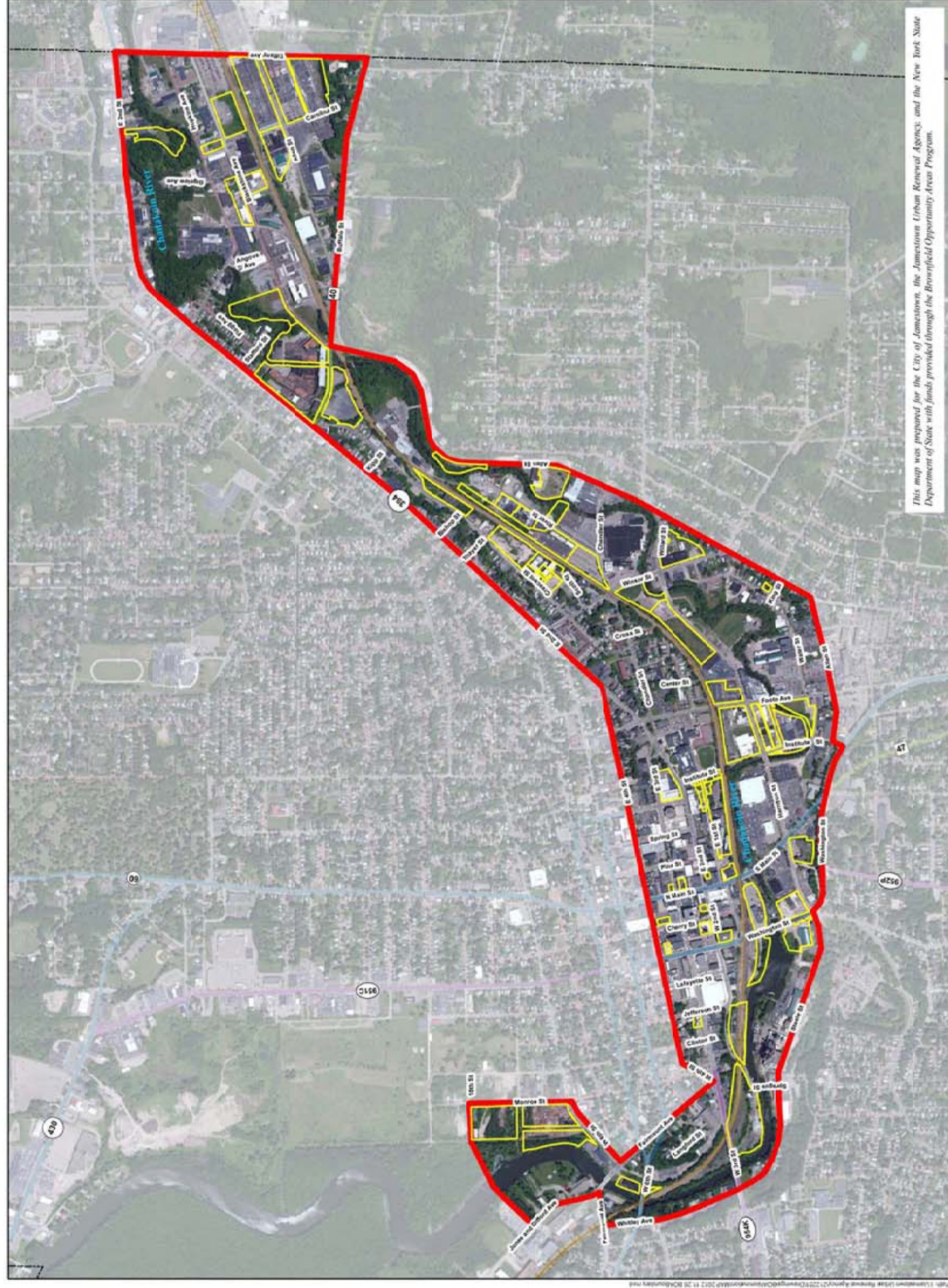
- BOA Nomination Study Area
Brownfield, Undeveloped,
and/or Vacant Sites
City Boundary
Parcels
Railroad
Interstate
State 900 Route
State Touring Route
County Touring Route

Sources:
1. Original BIA Sharplife provided by the City of Jamestown - Edited by LaBella to reflect steering committee revisions
2. Bing Maps Aerial, 2010 Microsoft Corporation and its data suppliers

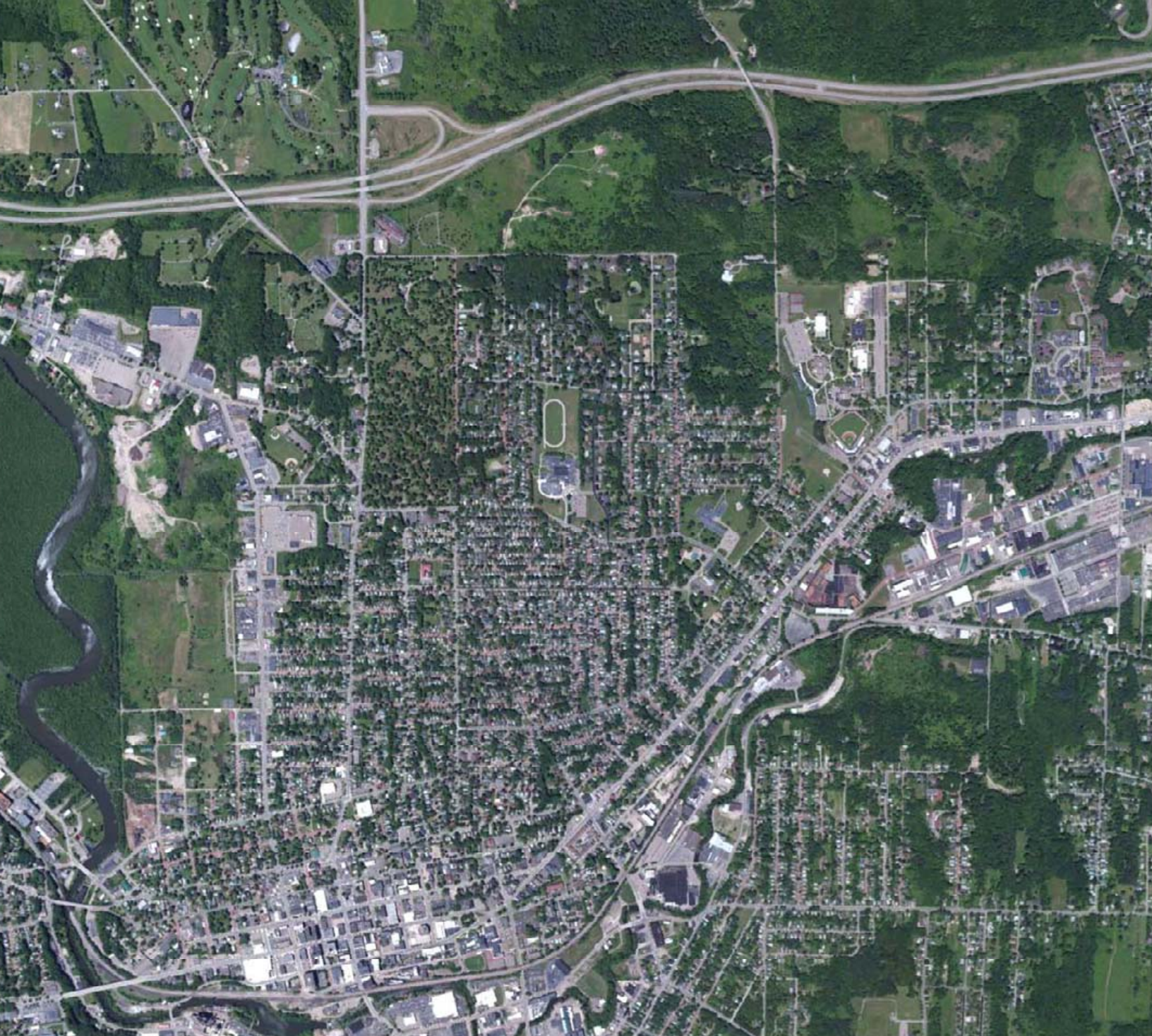


Labella Project No:
212251

Figure 5. Boundary Map

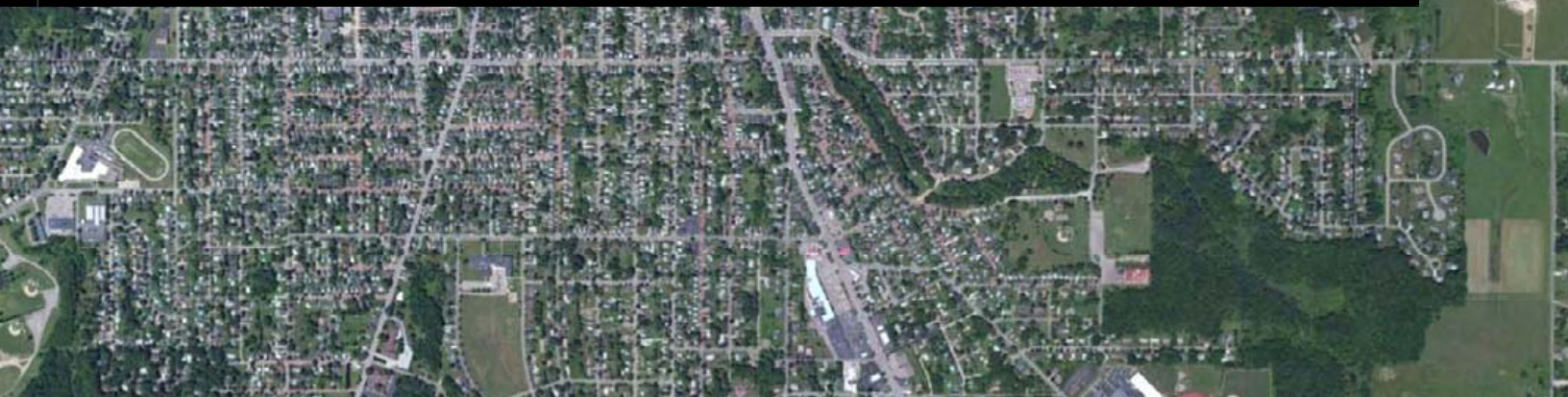


This map was prepared for the City of Jamestown, the Jamestown Urban Renewal Agency, and the New York State Department of State with funds provided through the Brownfield Opportunity Areas Program.



SECTION 2

PUBLIC PARTICIPATION & TECHNIQUES TO ENLIST PARTNERS



SECTION 2. PUBLIC PARTICIPATION AND TECHNIQUES TO ENLIST PARTNERS

A Community Participation Plan (CPP) was developed for the Chadakoin River Central/Eastern Study and is included within the Supporting Documents (Document 1). The CPP outlined a comprehensive public participation process that included public meetings, online media, steering committee (the Waterfront Advisory Committee) meetings, and stakeholder interviews. The CPP was reviewed by the Waterfront Advisory Committee and approved.

A summary of public, steering committee, and stakeholder meetings is provided below as well as information regarding the developer's forum.

CHADAKOIN RIVER CENTRAL BOA STUDY PROMOTION

From the start of the Chadakoin River Central/Eastern Study, the Waterfront Advisory Committee worked to ensure that the project was well publicized. A Community Participation & Visioning Plan, included in Supporting Document 1, was developed for the project to create awareness of the project, engage public participation, and to communicate and educate the public about the benefits of the BOA Study. The Press releases were created for public meetings and appropriate media were notified. Local media including the Jamestown Post Journal, WRFA 107.9 FM Radio for the Arts, and YNN Cable 8 News attended meetings and provided stories on the project.

To complement and support the Community Participation & Visioning Plan, a project website, www.ChadakoinRevitalization.com was created. The website provided information on the project so residents and businesses could review meeting minutes, agendas, public presentations, maps, BOA information, steering committee members and the latest press releases and news stories regarding the Chadakoin River Central/Eastern Study. Contact information was also provided on the website as well as opportunities for public input.

PUBLIC MEETINGS

A public meeting was held on April 24, 2012 to describe the project to the community and to begin to obtain input on the Study. The meeting was held at the Jackson Center on East Fourth Street and was advertised to the public through the local newspaper, mass e-mailings, fliers, and the project's website. Attendance

exceeded 75 people. The public meeting presentation is included in Supporting Document 2. The purpose of this meeting was to introduce the public to the project, the State's Brownfield Opportunity Area program, and inform those in attendance of the various methods by which the community can obtain project information and provide input. A PowerPoint presentation provided information to participants regarding the project team, the Brownfield Opportunity Area (BOA) program, the proposed Chadakoin River Central/Eastern Study, and the schedule. After the presentation, a visioning session was conducted to obtain public input for riverfront revitalization.

Public comments at the meeting included:

- The need to connect the Downtown and local neighborhoods to the Chadakoin River through multiple public access points
- The need to attract Chautauqua Lake tourists to the Downtown through promotion of the navigability and beauty of the Chadakoin River
- The need to maintain/protect existing and create new greenspaces, walking trails, bicycle trails, and other recreational opportunities
- The costs and benefits of low impact development versus destination development

A second public meeting was held on October 2, 2012 to relay the inventory results and preliminary findings of the BOA Study. The meeting was held at the Jackson Center on East Fourth Street and was advertised to the public through the local newspaper and the project's website. Attendance exceeded 20 people. The public meeting presentation is included in Supporting Document 2. The purpose of this meeting was to discuss project accomplishments to date (including completed project tasks and emerging themes), describe results of the inventory analysis, and provide an opportunity for public discussion. A PowerPoint presentation provided information to participants regarding the status of the project and findings to date. After the presentation, a discussion session was conducted to obtain public input for riverfront revitalization.

Public comments at the meeting included:

- The need to attract Chautauqua Lake tourists to the Downtown through promotion of the navigability and beauty of the Chadakoin River
 - The feasibility / lack of feasibility to create this waterway connection
- The need to attract new businesses to the City
- The need to increase the tax base

STEERING COMMITTEE MEETINGS

Waterfront Advisory Committee (Steering Committee) meetings were held on a regular basis during the course of the project, starting in February 2012. The meetings were held at the Lillian Vitanza Ney Renaissance Center and were designed to inform members of the progress of the Study and to obtain input on the direction of the project, information regarding the Study Area and local priorities, and feedback on the findings. The Waterfront Advisory Committee consisted of approximately 15 individuals representing the City of Jamestown, the Department of Public Works, the Board of Public Utilities, the Jamestown Renaissance Corporation, the Chautauqua Watershed Conservancy, Jamestown Community College, the Gebbie Foundation, local businesses and property owners, and partners such as the Department of State and the Department of Environmental Conservation. Key issues that the Waterfront Advisory Committee reviewed and provided guidance on included the creation of the Study Area boundaries; selection of brownfield, underutilized, and vacant sites; and identification of strategic sites. Minutes of the Waterfront Advisory Committee are provided in Supporting Document 3.

STAKEHOLDER ENGAGEMENT

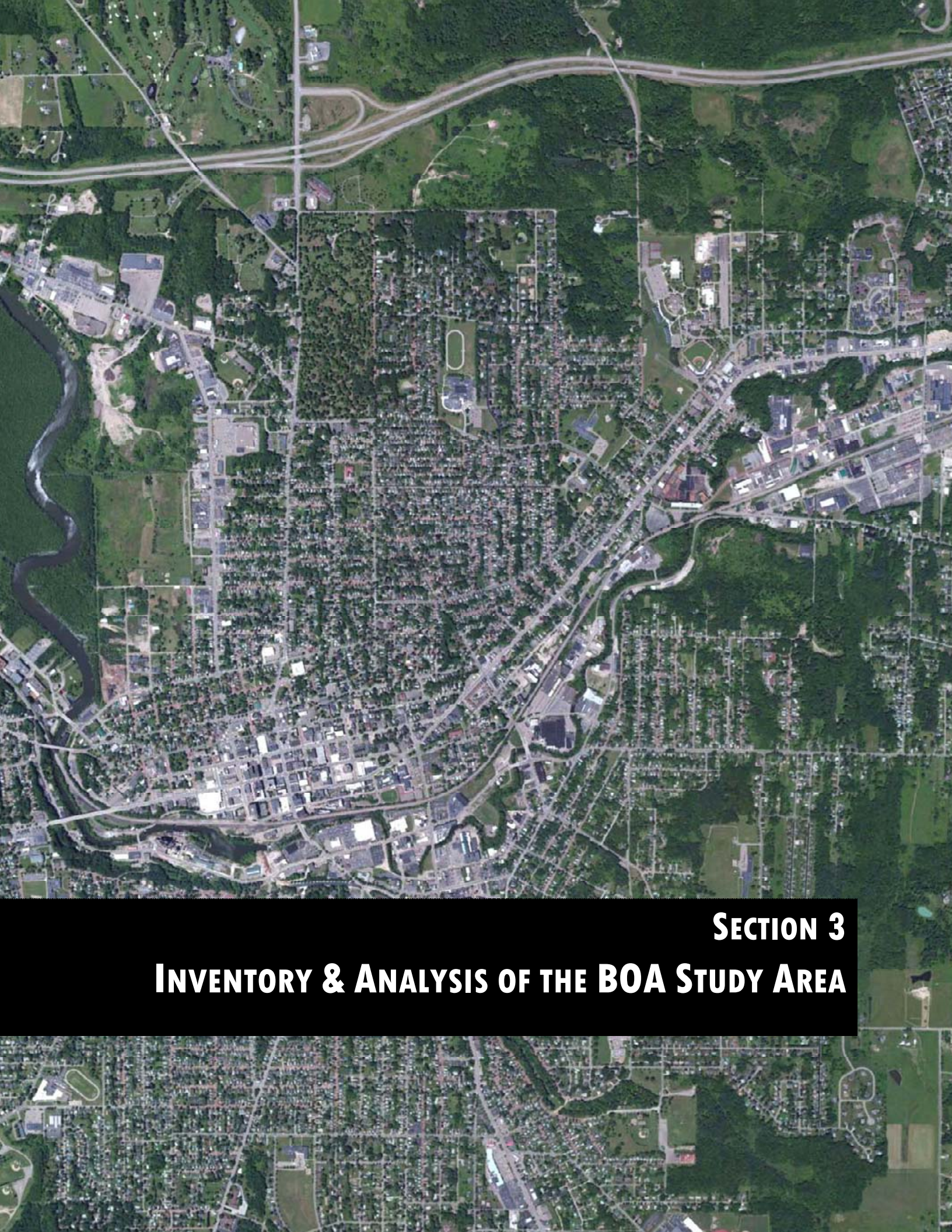
An initial series of stakeholder interviews were conducted during the early phases of the Nomination Study on April 24 and 25, 2012. Stakeholders were presented with a basic description of the project and then had the opportunity to ask questions and offer comments. Each stakeholder generally outlined their own and their agency's/organization's role within the community and then discussed strengths, weaknesses, opportunities, and threats within the Study Area. Land uses and key development sites were also identified.

The initial series of stakeholder interviews was a great success and approximately 17 agencies/organizations were represented. Participants included the Mayor of Jamestown and representatives of the Jamestown Urban Renewal Agency, the Jamestown Department of Public Works, the Board of Public Utilities, the Jamestown Renaissance Corporation, Jamestown Community College, the Chautauqua County IDA, the Chautauqua County Department of Planning and Economic Development, the Chautauqua County Health Network, the Chautauqua Watershed Conservancy, the New York State Department of Environmental Conservation, the Gebbie Foundation, the Health Care Action Team, the Lucy Desi Center for Comedy, and several local development corporations and business owners.

Additional stakeholder interviews were held throughout the project as the need arose. Participants at these later interviews included representatives of the City Council, the Downtown Jamestown Development Corporation, the Resource Center, the Chautauqua County Department of Planning and Economic Development, the New York Business Development Corporation, and the WNYP Railroad.

DEVELOPER'S FORUM

An economic development forum will be held to link developers and property owners to those with specialized knowledge of brownfield redevelopment. The forum will utilize the experts of the Consultant Team, which includes those that have directly helped both municipalities and private developers clean up and redevelop brownfield sites, as well as other, invited guest speakers in contact with those entities that can help the City address brownfield issues in the immediate future. The speakers will discuss methods of overcoming the challenges posed by the redevelopment of brownfield sites, describe specific redevelopment opportunities within Jamestown, and help identify resources for moving forward. The speakers will also describe the vision for a revitalized waterfront, and discuss opportunities associated with that vision.



SECTION 3

INVENTORY & ANALYSIS OF THE BOA STUDY AREA

SECTION 3. INVENTORY & ANALYSIS OF THE BROWNFIELD OPPORTUNITY AREA

While the Project Overview and Description section provided a general, introductory overview of the Chadakoin River Central/Eastern Study Area, the following Inventory and Analysis of the BOA Study Area section provides detailed information on various factors that influence the location, size, character and use of future redevelopment and development in the BOA. The following characteristics are reviewed under this section: demographics; land use; zoning; brownfield, underutilized, and vacant sites; transportation systems; infrastructure systems; land ownership; parks; natural resources; historic resources; and economic/market conditions.

COMMUNITY AND REGIONAL SETTING

EXISTING PLANNING INITIATIVES

The City of Jamestown and Chautauqua County have had success in recent years with the development of several planning initiatives. However, many of the concepts advanced in these planning initiatives have not been implemented but remain on the City's/County's agenda, and may need to be revisited and prioritized in light of current and projected economic conditions and community needs.

JAMESTOWN RIVERFRONT RECLAMATION AND DEVELOPMENT STUDY

The *Jamestown Riverfront Reclamation and Development Study* was completed during the late 1980s, updated in 1991, and formally adopted by the City Council in 1994. The outcome of this effort was to promote recreational, economic and open space uses along the Chadakoin River. The study suggested the establishment of a series of parks, green spaces, a continuous bike path and Riverwalk throughout the community. Recommendations were context sensitive, considering the differing environs and characteristics of unique natural and manmade zones along the River.

CITY OF JAMESTOWN COMPREHENSIVE PLAN

The *City of Jamestown's Comprehensive Plan (Comprehensive Plan)* was written in 1998. The *Comprehensive Plan* states that two major constraints to the development of Jamestown are hazardous materials along the River Corridor and the lack of access to the River. The BOA program offers a solution to these constraints by planning for the remediation of these sites and the redevelopment of

the River Corridor as a recreational, commercial, and (in appropriate locations) industrial resource. Additionally, one of the recommendations of the Comprehensive Plan is that the City of Jamestown should initiate a program to identify hazardous material sites and define a strategy to make these properties available for redevelopment. As the City of Jamestown is mostly built out, there is limited open land available for development. Cleanup of brownfield sites, packaged with economic incentives, will facilitate development within the City of Jamestown. This, in turn, will help to protect open space and farmland located outside the City limits.

SOUTHERN TIER WEST REGIONAL DEVELOPMENT STUDY

The Southern Tier West Regional Planning and Development Board is a NYS regional planning board that serves Chautauqua, Allegany and Cattaraugus Counties. Southern Tier West issued a Comprehensive Economic Development Strategy in 2012. One of the goals of this study is to increase the region's innovation and entrepreneurship networks through attraction of new businesses to the region. Strategies to achieve this goal include development of shovel-ready sites, renovation of redevelopable buildings, and remediation of brownfield sites and buildings. Another goal is to create quality, connected places through (among other things) development and expansion of industrial sites. Strategies to achieve this goal include retrofitting older buildings into modern productive facilities, pursuing appropriate brownfield remediation and redevelopment projects, and marketing of industrial buildings and sites. The study's Plan of Action includes undertaking and encouraging environmental and conservation-based economic development strategies including remediation and redevelopment of regional brownfield sites and buildings.

JAMESTOWN URBAN DESIGN PLAN

The Jamestown Urban Design Plan (Urban Design Plan) was prepared in August 2006 and was formally adopted by the Jamestown Planning Commission and the Jamestown City Council in December 2006. The Urban Design Plan intends to create a unique urban area as a means to entice regional visitors through transforming the Chadakoin Riverfront into a regional destination; strengthening the Downtown Core through new development, streetscaping and programming; and adopting and promoting higher design standards for new development to keep with Jamestown's character and heritage. Volume II of the Urban Design Plan sets forth design standards for new development. The boundary of the study area for which the design guidelines apply consists mainly of Downtown Jamestown and along the River Corridor from McCrea Point to Institute Street. The Jamestown Renaissance Corporation (a not-for-profit organization created to support the implementation of this plan) has completed storefront restorations along Main and East and West

Third Streets. This plan and its design guidelines directly apply to the Chadakoin River Central/Eastern Study Area, and the goals and general message of creating attractive, green, and multi-modal developments which center on enhancing the riverfront have been woven into the fabric of the Chadakoin River Central/Eastern Study.

CITY OF JAMESTOWN: TRAFFIC AND STREETScape ENHANCEMENT PLAN

The *City of Jamestown: Traffic and Streetscape Enhancement Plan* was prepared in 2008 using funds through the 2004-2005 Quality Communities Grant Program and the Gebbie Foundation. Created as the next step in implementing the vision of the *Urban Design Plan*, the *Traffic and Streetscape Enhancement Plan* provides a strategy for improving traffic circulation and enhancing the aesthetics and safety of the Downtown streetscape. Traffic feasibility studies were conducted for proposed traffic circulation changes found in the *Urban Design Plan*. Additionally, guidelines were developed to improve the physical streetscape within the Downtown. The plan focuses on the Downtown pedestrian core, bounded between the riverfront and Fourth Street, from Jefferson Street to Foote Avenue. The plan mentions the importance of creating pedestrian connections to Riverwalk and other riverfront areas. Specific recommendations focus on improving Riverwalk through the installation of wayfinding signage and traffic calming measures, particularly where it crosses Main Street.

Like the *Urban Design Plan*, the *Traffic and Streetscape Enhancement Plan* applies to the Chadakoin River Central/Eastern Study Area and the recommended general streetscape enhancement design guidelines found within the plan have been incorporated into the Chadakoin River Central/Eastern Study.

THE CITY OF JAMESTOWN: A LIVABLE COMMUNITY

The *City of Jamestown: A Livable Community* plan was prepared in 2010 to “set strategic objectives for neighborhoods in the same manner the *Urban Design Plan* (UDP) had done for Jamestown’s downtown.” Comprised of three sections, the first entitled “Reinvesting in Itself” focuses on “private and public strategic actions for ‘market based’ neighborhood revitalization.” Section two details the City’s vision and planning principles as related to neighborhood, housing, and infrastructure issues while section three provides collaborative actions and specific recommendations for implementation of the plan. Recommendations revolve around tangible aspects, such as creating choices in housing alternatives and facilitating easy access to green spaces, and intangible aspects, such as a nurturing a sense of community and community empowerment.

JAMESTOWN LOCAL WATERFRONT REVITALIZATION PROGRAM

The Local Waterfront Revitalization Program (LWRP) for the City of Jamestown was initiated in the 1990s, but the draft document was never finalized and has remained dormant for many years. Due to the completion of other, more recent planning initiatives, the LWRP would be largely out of date. In addition, a number of new waterfront projects have materialized that post-date the original LWRP, including the Jamestown Gateway Project. In June 2008, the City applied to the NYSDOS for additional funding to complete the LWRP and incorporate the goals and objectives of the aforementioned plans to create a final LWRP that is consistent and supportive of these projects and initiatives. Funding has been awarded and generation of the final LWRP is currently underway. The work is closely coordinated with this Chadakoin River Central/Eastern Study such that findings and recommendations will be consistent.

JAMESTOWN BICYCLE AND PEDESTRIAN PLAN

Currently in draft form, the Pedestrian and Bicycle Plan for the City of Jamestown aims “to provide recommendations for improving walking and bicycling conditions in Jamestown for anyone who desires to live an active lifestyle by bicycling or walking to school, work, and other local destinations; or by going for a walk or bicycle ride to the City’s parks, the library, or downtown.” The plan inventories existing conditions including planning efforts, ordinances, crash data analysis, Safe Routes to School analysis, GIS analysis, infrastructure analysis, etc. Goals and action items relating to the five E’s (Education, Engineering, Encouragement, Enforcement, and Evaluation and Planning) are presented. Additionally, the plan details over 100 pedestrian network recommendations, over 50 bicycle network recommendations, and nearly 40 street intersection enhancement recommendations. These recommendations include filling in the gaps of the existing non-complete sidewalk network, installing bike lanes and sharrows along key routes, constructing shared use paths (including the **Chadakoin Park Bike Trail**), and installing high visibility crosswalks, countdown timers, bike boxes, signage, and pavement markings at key intersections to name a few. The plan concludes with implementation strategies and resources.

CHAUTAUQUA LAKE WATERFRONT REVITALIZATION PROGRAM

The Chautauqua Lake Local Waterfront Revitalization Program (LWRP) covers the Towns of Chautauqua, Ellery, Ellicott, Busti and North Harmony and the Villages of Mayville, Bemus Point, Celoron and Lakewood. The LWRP establishes a shared vision for a long-term waterfront revitalization program that seeks to strengthen the local economy, expand waterfront access opportunities, and protect natural and

cultural resources. The eastern boundary of the Chautauqua Lake LWRP meets the western boundary of the Chadakoin River Western BOA Pre-Nomination Study Area.

CHAUTAUQUA COUNTY GREENWAY PLAN

The *Chautauqua County Greenway Plan* was prepared in 2012 to provide “a blueprint for making decisions regarding greenway and trail development that will enhance the quality of life for residents of the County.” The plan inventories existing natural, cultural, historic, and recreational assets of the County, analyzes and synthesizes these assets into the plan’s vision, goals, and objectives, and ultimately provides specific recommendations to accomplish the plan’s goals. Goals include providing active living/alternative transportation opportunities, connectivity and trail development, and marketing and tourism to name a few. Specific recommendations involving Jamestown include adoption of local Complete Street Policies, completion of the Chadakoin Park Trail (Riverwalk Trail extension), creation of off-road trail/bicycle connections to Lakewood and Mason Industrial Park, development of on-road bicycle trails to Ashville and Frewsburg, development of a rail trail to Mayville, enhancement of the Chadakoin River Water Trail, and creation of a portage area around the Warner Dam to name a few.

DEMOGRAPHICS

The population of the City of Jamestown has varied over the last 20 years (Table 1). Between 1990 and 2000, the City lost nearly 3,000 residents or 8.5 percent of its population settling at 31,730 residents in 2000. In 2010, the population of the City began to stabilize as evidenced by the less significant loss of 500 residents since 2000. Chautauqua County’s population has decreased over the last 20 years by nearly 7,000 residents ending up at about 135,000 residents in 2010.

Population in the Chadakoin River Central/Eastern Study Area, as estimated by Census Tract population data, has declined in some tracts and grown in others. Portions of Census Tracts 301, 303, 304, 305, and 306 are within the Chadakoin River Central/Eastern Study Area (Figure 6). Tract 303 located in the north-western portion of the Study Area lost residents at an increasing rate between 1990 and 2010, currently residing at about 2,000 people. Tracts 304 and 305 located in the south-western and central portions of the Study Area lost residents between 1990 and 2010 but saw a smaller reduction rate between the latter two decades settling at about 4,000 and 3,500 people, respectively. Tracts 301 and 306 located in the eastern portions of the Study Area experienced the largest population reduction rates between 1990 and 2000, but gained population by 2010 both ending up with approximately 4,000 residents each.

Table 1. Population

| Area | Population (Year) | | | Change 1990-2000 | | Change 2000-2010 | |
|-------------------|-------------------|------------|------------|------------------|---------|------------------|---------|
| | 1990 | 2000 | 2010 | Number | Percent | Number | Percent |
| Tract 301 | 4,392 | 3,732 | 4,024 | -660 | -15.03% | 292 | 7.82% |
| Tract 303 | 2,662 | 2,441 | 2,132 | -221 | -8.30% | -309 | -12.66% |
| Tract 304 | 4,566 | 4,303 | 4,152 | -263 | -5.76% | -151 | -3.51% |
| Tract 305 | 3,989 | 3,688 | 3,519 | -301 | -7.55% | -169 | -4.58% |
| Tract 306 | 4,440 | 3,844 | 3,964 | -596 | -13.42% | 120 | 3.12% |
| City of Jamestown | 34,681 | 31,730 | 31,146 | -2,951 | -8.51% | -584 | -1.84% |
| Chautauqua County | 141,895 | 139,750 | 134,905 | -2,145 | -1.51% | -4,845 | -3.47% |
| New York State | 17,990,455 | 18,976,457 | 19,378,102 | 986,002 | 5.48% | 401,645 | 2.12% |

Source: US Census Bureau's Factfinder – 1990, 2000, and 2010 Decennial Census

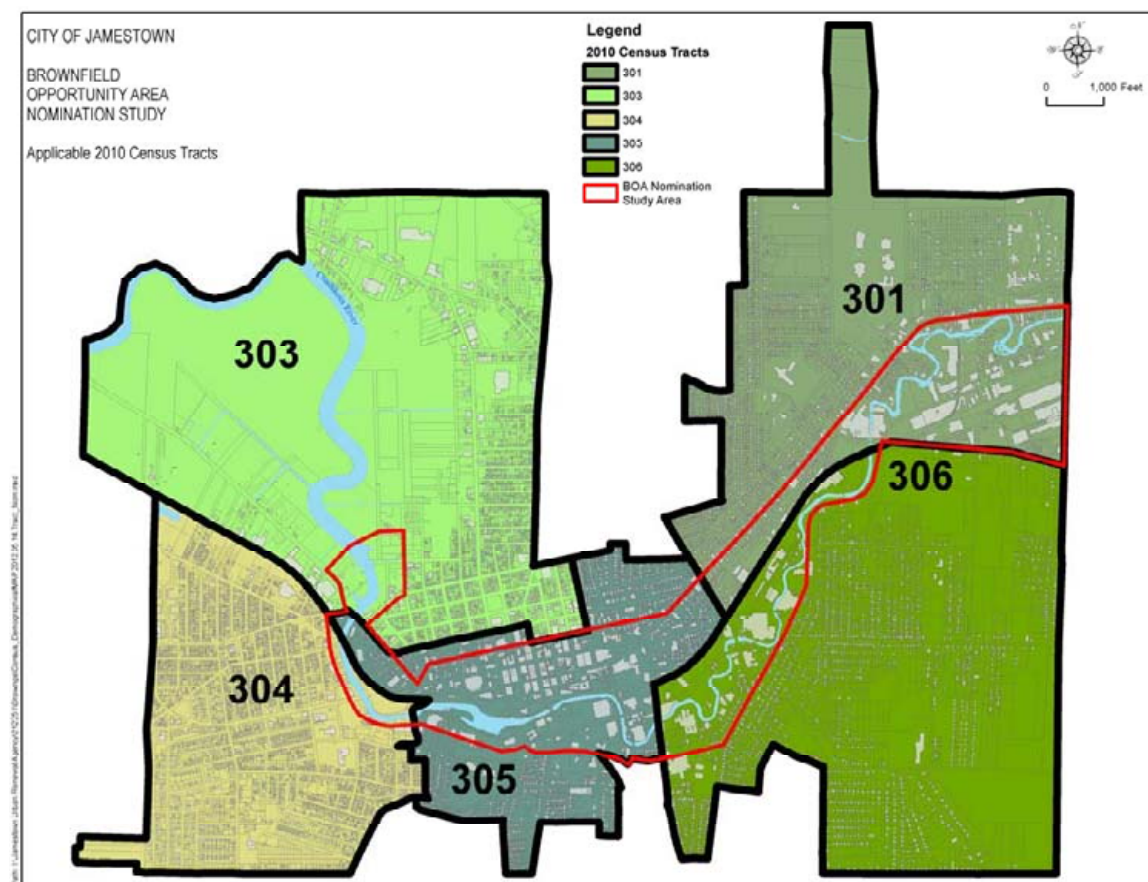


Figure 6. Census Tracts within the BOA Nomination Study Area

Source: US Census Bureau's TIGER/Line database

Census Tract demographics as shown in Tables 2 through 6 also characterize the population and housing stock in the Study Area. All five Census Tracts experienced an increase in the percentage of racial minority and Hispanic/Latino residents between 2000 and 2010. Tract 303 has the largest percentage of racially and ethnically diverse people while Tract 304 has the lowest. The percentage of female

population has decreased in all five Census Tracts. The percentage of dependent population (those less than 18 years old or 65 years and older) within Census Tracts 303, 304, 305, and 306 has decreased to levels comparable with the City while Tract 301, despite its decrease, still has a marginally higher dependent population. The median age within the Tracts ranges from 32.8 to 39.6 years.

Table 2. Census Tract Population Characteristics

| | | Tract 301 | Tract 303 | Tract 304 | Tract 305 | Tract 306 | City of Jamestown | Chautauqua County | New York State |
|--|--------|-----------|-----------|-----------|-----------|-----------|-------------------|-------------------|----------------|
| Minority Race (all races other than White) | | | | | | | | | |
| | 2010 | 12.20% | 27.20% | 6.09% | 17.87% | 9.74% | 11.56% | 7.43% | 34.25% |
| | 2000 | 8.31% | 26.46% | 3.88% | 13.48% | 6.58% | 8.48% | 5.96% | 32.05% |
| | Change | 46.89% | 2.80% | 57.01% | 32.64% | 47.95% | 36.30% | 24.67% | 6.85% |
| Hispanic and/or Latino | | | | | | | | | |
| | 2010 | 10.06% | 18.01% | 3.44% | 15.32% | 8.85% | 8.79% | 6.11% | 17.63% |
| | 2000 | 5.98% | 11.55% | 1.81% | 10.82% | 4.55% | 4.94% | 4.22% | 15.11% |
| | Change | 68.44% | 55.91% | 90.00% | 41.58% | 94.50% | 78.01% | 44.67% | 16.69% |
| Female Population | | | | | | | | | |
| | 2010 | 50.62% | 49.16% | 52.12% | 51.44% | 49.55% | 51.39% | 50.70% | 51.61% |
| | 2000 | 52.12% | 49.77% | 53.52% | 52.98% | 51.20% | 52.34% | 51.24% | 51.80% |
| | Change | -2.87% | -1.24% | -2.62% | -2.92% | -3.22% | -1.83% | -1.05% | -0.37% |
| Dependents (Less than 18 yrs old or 65 years and older) | | | | | | | | | |
| | 2010 | 42.37% | 38.79% | 37.79% | 39.76% | 37.24% | 39.22% | 38.42% | 35.83% |
| | 2000 | 43.35% | 39.57% | 41.32% | 43.06% | 41.21% | 41.81% | 40.50% | 37.62% |
| | Change | -2.27% | -1.98% | -8.55% | -7.67% | -9.64% | -6.20% | -5.15% | -4.76% |
| Median Age | | | | | | | | | |
| | 2010 | 35.1 | 32.8 | 39.6 | 38.5 | 36.5 | 36.9 | 40.9 | 38.0 |
| | 2000 | 34.0 | 33.2 | 37.7 | 38.3 | 33.9 | 36.2 | 37.9 | 35.9 |
| | Change | 3.24% | -1.20% | 5.04% | 0.52% | 7.67% | 1.93% | 7.92% | 5.85% |

Source: US Census Bureau's Factfinder – 2000 and 2010 Decennial Census

The total number of households has decreased marginally in Census Tracts 301, 304, 305, and 306 (ranging between 1,500 to 1,800 each) with a significant decrease in Tract 303 to less than 900 households. The percentage of family households has also decreased in all five Census Tracts. Tract 305's substantially lower (36%) percentage of family households is indicative of its Downtown nature. Average household sizes have remained fairly constant in all Tracts between 2000 and 2010.

Table 3. Census Tract Household Characteristics

| | | Tract 301 | Tract 303 | Tract 304 | Tract 305 | Tract 306 | City of Jamestown | Chautauqua County | New York State |
|-------------------------------|--------|-----------|-----------|-----------|-----------|-----------|-------------------|-------------------|----------------|
| Total Households | | | | | | | | | |
| | 2010 | 1,542 | 891 | 1,838 | 1,707 | 1,521 | 13,122 | 54,244 | 7,317,755 |
| | 2000 | 1,575 | 1,031 | 1,873 | 1,734 | 1,580 | 13,558 | 54,515 | 7,056,860 |
| | Change | -2.10% | -13.58% | -1.87% | -1.56% | -3.73% | -3.22% | -0.50% | 3.70% |
| Family Households | | | | | | | | | |
| | 2010 | 54.02% | 52.41% | 58.76% | 35.85% | 61.47% | 56.48% | 62.87% | 63.54% |
| | 2000 | 57.97% | 54.12% | 60.76% | 37.25% | 63.61% | 58.28% | 65.97% | 65.74% |
| | Change | -6.81% | -3.16% | -3.29% | -3.76% | -3.36% | -3.09% | -4.71% | -3.35% |
| Average Household Size | | | | | | | | | |
| | 2010 | 2.31 | 2.38 | 2.26 | 1.93 | 2.38 | 2.29 | 2.37 | 2.57 |
| | 2000 | 2.31 | 2.35 | 2.27 | 1.91 | 2.41 | 2.29 | 2.45 | 2.61 |
| | Change | 0.00% | 1.28% | -0.44% | 1.05% | -1.24% | 0.00% | -3.27% | -1.53% |

Source: US Census Bureau's Factfinder – 2000 Census and 2006-2010 American Community Survey

Educational attainment has increased in all five Census Tracts with a larger percentage of the adult population having obtained a high school diploma and/or college degree. Despite these increases, only 67 percent of adult residents within Tract 303 have received a high school diploma. Median household income has increased in all five Census Tracts; however, Tracts 301 (\$25,000) and 303 (\$26,000) have slightly lower and Tract 305 (\$16,000) has considerably lower median household incomes than the City (\$33,000) as a whole. Per capita income is substantially lower in all Census Tracts (except Tract 304) compared to the City as a whole. In fact, Tract 301 experienced a decrease in per capita income between 2000 and 2010 to \$13,000. Not surprisingly, poverty rates in all Census Tracts (except Tract 304) are higher than the City as a whole, especially in Tract 305 in which nearly 42 percent of individuals live in poverty. Tract 303 was the only Tract to experience a reduction in the percentage of individuals living below the poverty level.

Table 4. Census Tract Education and Income Characteristics

| | Tract 301 | Tract 303 | Tract 304 | Tract 305 | Tract 306 | City of Jamestown | Chautauqua County | New York State |
|---|-----------|-----------|-----------|-----------|-----------|-------------------|-------------------|----------------|
| Education (High School Diploma or Equivalent and Greater) | | | | | | | | |
| 2010 | 82.56% | 67.41% | 92.53% | 73.98% | 81.77% | 84.27% | 86.20% | 84.45% |
| 2000 | 77.15% | 66.37% | 86.08% | 63.72% | 77.72% | 79.42% | 81.19% | 79.06% |
| Change | 7.01% | 1.56% | 7.50% | 16.10% | 5.21% | 6.11% | 6.17% | 6.81% |
| Median Household Income (does not take into account inflation) | | | | | | | | |
| 2010 | \$25,306 | \$25,991 | \$37,813 | \$16,312 | \$31,672 | \$33,092 | \$40,639 | \$55,603 |
| 2000 | \$22,490 | \$17,622 | \$33,217 | \$13,830 | \$26,024 | \$25,837 | \$33,458 | \$43,393 |
| Change | 12.52% | 47.49% | 13.84% | 17.95% | 21.70% | 28.08% | 21.46% | 28.14% |
| Per Capita Income (does not take into account inflation) | | | | | | | | |
| 2010 | \$12,976 | \$13,513 | \$21,968 | \$13,853 | \$15,613 | \$18,374 | \$21,033 | \$30,948 |
| 2000 | \$13,562 | \$12,904 | \$18,394 | \$11,294 | \$12,850 | \$15,316 | \$16,840 | \$23,389 |
| Change | -4.32% | 4.72% | 19.43% | 22.66% | 21.50% | 19.97% | 24.90% | 32.32% |
| Individuals Below the Poverty Level | | | | | | | | |
| 2010 | 34.02% | 28.59% | 11.90% | 41.69% | 32.86% | 23.42% | 17.14% | 14.16% |
| 2000 | 24.40% | 32.43% | 9.93% | 33.93% | 24.35% | 19.55% | 13.84% | 14.59% |
| Change | 39.41% | -11.85% | 19.91% | 22.86% | 34.91% | 19.78% | 23.79% | -2.93% |

Source: US Census Bureau's Factfinder – 2000 Census and 2006-2010 American Community Survey

Unemployment rates have increased in all Census Tracts between 2000 and 2010, doubling in Tracts 301 (to 20%) and 303 (to 32%) and nearly tripling in Tract 305 (to 24%). Less and less of those who are employed are working within their neighborhood of residence. About half of the employed residents within Census Tracts 301, 305, and 306 work within their neighborhood of residence, while 60 percent residing within Tract 303 and 40 percent residing within Tract 304 can claim the same. The majority of employed residents drive to work alone (in a single occupancy vehicle); however, the percentage of people using public transit, walking, or biking to work has increased in all Census Tracts (except Tract 301). In fact, 22 percent of employed residents in Tract 305 and 24 percent of employed residents in Tract 303 use public transit, walk, or bike to work. The percentage of households without access to a vehicle has increased in some Census Tracts (Tracts 304, 305,

and 306) and decreased in others (Tracts 301 and 303). Nearly 44 percent of households within Tract 305 do not have access to a vehicle.

Table 5. Census Tract Work Characteristics

| | | Tract 301 | Tract 303 | Tract 304 | Tract 305 | Tract 306 | City of Jamestown | Chautauqua County | New York State |
|--|--------|--------------|--------------|--------------|--------------|--------------|----------------------|----------------------|-------------------|
| Unemployed | | | | | | | | | |
| | 2010 | 20.03% | 32.22% | 6.57% | 24.14% | 15.92% | 13.76% | 8.12% | 7.50% |
| | 2000 | 9.89% | 17.86% | 5.37% | 8.52% | 10.67% | 8.34% | 6.25% | 7.08% |
| | Change | 102.49% | 80.34% | 22.31% | 183.40% | 49.13% | 65.02% | 29.95% | 6.02% |
| Worked within Neighborhood of Residence | | | | | | | | | |
| | 2010 | 51.81% | 59.71% | 39.76% | 52.38% | 48.27% | 50.15% | 39.93% | 58.93% |
| | 2000 | 58.61% | 64.02% | 52.95% | 65.12% | 61.61% | 58.87% | 44.93% | 57.38% |
| | Change | -11.60% | -6.73% | -24.90% | -19.57% | -21.65% | -14.82% | -11.13% | 2.71% |
| Trip to Work (Drove Alone) | | | | | | | | | |
| | 2010 | 76.66% | 55.18% | 78.79% | 60.81% | 70.81% | 74.38% | 78.67% | 54.12% |
| | 2000 | 69.10% | 56.69% | 83.39% | 58.76% | 72.29% | 75.09% | 78.51% | 56.26% |
| | Change | 10.95% | -2.67% | -5.51% | 3.50% | -2.05% | -0.94% | 0.20% | -3.81% |
| Trip to Work (Transit, Walk, or Bike) | | | | | | | | | |
| | 2010 | 10.19% | 24.11% | 8.25% | 22.21% | 12.05% | 10.45% | 7.24% | 33.95% |
| | 2000 | 12.50% | 20.96% | 4.50% | 21.26% | 9.39% | 8.71% | 6.50% | 30.97% |
| | Change | -18.45% | 15.03% | 83.32% | 4.49% | 28.32% | 19.94% | 11.36% | 9.63% |
| No Household Access to a Vehicle | | | | | | | | | |
| | 2010 | 22.36% | 29.66% | 14.42% | 43.94% | 23.53% | 20.65% | 10.86% | 28.50% |
| | 2000 | 24.95% | 36.01% | 11.13% | 43.60% | 16.84% | 20.03% | 11.21% | 29.66% |
| | Change | -10.38% | -17.64% | 29.54% | 0.77% | 39.74% | 3.11% | -3.15% | -3.89% |

Source: US Census Bureau's Factfinder – 2000 Census and 2006-2010 American Community Survey

The total number of housing units has remained fairly constant in Census Tracts 301, 304, and 305 with a sizeable decrease in Tracts 303 and 306. Vacancy rates have increased in all Census Tracts (except Tract 306), the highest rate found in Tract 303 (over 18%). Ownership rates have decreased in all five Census Tracts ranging from 14 percent owner occupied in Tract 305 to 61 percent owner occupied in Tract 304. Median gross rent has increased in all five Census Tracts, the largest increase in Tract 303 to nearly \$700 a month. Median housing value has also increased in all five Census Tracts; however, Tract 303's median housing value (\$38,400) is substantially lower than the City's (\$63,500) as a whole. The majority of housing stock in all five Census Tracts was built prior to 1939, the highest percentage (74%) found in Tract 303.

Table 6. Census Tract Housing Unit Characteristics

| | Tract 301 | Tract 303 | Tract 304 | Tract 305 | Tract 306 | City of Jamestown | Chautauqua County | New York State |
|--|--------------|--------------|--------------|--------------|--------------|----------------------|----------------------|-------------------|
| Total Housing Units | | | | | | | | |
| 2010 | 1,774 | 1,092 | 2,021 | 2,011 | 1,684 | 14,738 | 66,920 | 8,108,103 |
| 2000 | 1,762 | 1,219 | 2,012 | 2,029 | 1,768 | 15,027 | 64,900 | 7,679,307 |
| Change | 0.68% | -10.42% | 0.45% | -0.89% | -4.75% | -1.92% | 3.11% | 5.58% |
| Housing Vacancy Rate | | | | | | | | |
| 2010 | 13.08% | 18.41% | 9.05% | 15.12% | 9.68% | 10.96% | 18.94% | 9.75% |
| 2000 | 10.61% | 15.42% | 6.91% | 14.54% | 10.63% | 9.78% | 16.00% | 8.11% |
| Change | 23.22% | 19.35% | 31.07% | 3.97% | -8.97% | 12.16% | 18.38% | 20.26% |
| Housing Units Owner Occupied | | | | | | | | |
| 2010 | 40.34% | 36.14% | 60.99% | 14.12% | 53.45% | 49.15% | 67.98% | 53.27% |
| 2000 | 45.21% | 36.47% | 63.32% | 17.42% | 54.18% | 51.35% | 69.25% | 52.99% |
| Change | -10.77% | -0.91% | -3.68% | -18.94% | -1.34% | -4.29% | -1.83% | 0.53% |
| Median Gross Rent (does not take into account inflation) | | | | | | | | |
| 2010 | \$640 | \$686 | \$596 | \$441 | \$567 | \$555 | \$581 | \$977 |
| 2000 | \$430 | \$381 | \$462 | \$325 | \$408 | \$407 | \$438 | \$672 |
| Change | 48.84% | 80.05% | 29.00% | 35.69% | 38.97% | 36.36% | 32.65% | 45.39% |
| Median Housing Value (does not take into account inflation) | | | | | | | | |
| 2010 | \$55,600 | \$38,400 | \$66,200 | \$49,500 | \$46,900 | \$63,500 | \$79,600 | \$303,900 |
| 2000 | \$43,500 | \$36,000 | \$55,300 | \$34,900 | \$43,600 | \$50,500 | \$62,700 | \$147,600 |
| Change | 27.82% | 6.67% | 19.71% | 41.83% | 7.57% | 25.74% | 26.95% | 105.89% |
| Homes Built Prior to 1939 | | | | | | | | |
| 2010 | 56.14% | 74.37% | 58.64% | 64.49% | 65.25% | 61.05% | 46.57% | 34.05% |
| 2000 | 67.48% | 75.00% | 57.77% | 71.27% | 67.14% | 63.97% | 47.28% | 31.23% |
| Change | -16.80% | -0.84% | 1.51% | -9.50% | -2.81% | -4.56% | -1.50% | 9.02% |

Source: US Census Bureau's Factfinder – 2000 and 2010 Census and 2006-2010 American Community Survey

In summary, Census Tract 303 has a much smaller population than the other tracts. A high percentage of racial minority and Hispanic/Latino residents are located in the Tract. The Tract's median age and educational attainment are low, while unemployment rates are high. Despite these facts, the percentage of residents living in poverty has decreased. Many employed residents work within the neighborhood and use public transit, walk, or bike to work. This Tract has high vacancy rates and an old housing stock. Rent prices are high; while housing value is low. Census Tract 304 has the lowest percentage of racial minority and Hispanic/Latino residents. There is a high median age, educational attainment, and median household and per capita income. Poverty and unemployment rates are low. Many people work outside of the neighborhood and therefore drive personal vehicles to work. This Tract has low vacancy rates, high ownership rates, and a high median housing value. Census Tract 305 has many characteristics indicative of its' Downtown nature. There is a low percentage of family households leading to a low median household income. The highest poverty rates are found in this tract. Many households do not have access to a vehicle. A large percentage of housing units are rented which is complimented by the lowest median rent compared to the other four tracts. Census Tracts 301 and 306 were usually in between the high and low extremes of the demographic variables.

EMPLOYMENT OVERVIEW

W-ZHA identified and evaluated market and economic trends impacting the Jamestown economy. The following employment overview section is summarized from W-ZHA's report. The full report is included in Supporting Document 6.

The City of Jamestown has more jobs (13,523 jobs in 2010) than employed residents (11,152 people in 2010) but approximately two-thirds of the City of Jamestown's jobs are held by people who live outside of the City. The majority of Jamestown residents (57%) are actually working outside of the City (see Table 7).

Table 7. Job Inflow/Outflow – City of Jamestown - 2010

| | Total | Percent |
|---------------------------------|--------|---------|
| Employed in City | 13,523 | |
| Employed in City, Lives Outside | 8,716 | 64% |
| Employed and Lives in City | 4,807 | 36% |
| Lives in City | 11,152 | |
| Lives in City, Works Outside | 6,345 | 57% |
| Lives and Works in City | 4,807 | 43% |

Source: U.S. Census; W-ZHA

According to the Census, in 2010, the City of Jamestown contained approximately one-third of the County's jobs (see Table 8). While the City holds a substantial share of many of the different employment types, several are of particular importance. First, manufacturing is the largest employment industry within the County. Despite significant job losses within this industry, approximately one out of four County manufacturing jobs is located within the City of Jamestown. Second, health care and social services are the second largest employment industry within the County. Unlike manufacturing, this industry is growing substantially. The City of Jamestown contains over half of the County's health care and social services jobs. Major employers in this industry located within the City of Jamestown include the WCA Hospital and the Resource Center. Lastly, while not a significant job generator, it is important to note that the City of Jamestown is the cultural and recreation center of the County. The City contains 65 percent of the County's arts, entertainment, and recreation jobs. The Jamestown Savings Ice Arena is a major recreation anchor that draws attendance from the larger region. The Downtown also contains the Reg Lenna Civic Center, the Lucille Ball-Desi Arnaz Center, and the Fenton History Center.

According to the Census, Chautauqua County lost six percent of its jobs between 2002 and 2010, while the City of Jamestown lost only five percent of its jobs (see Tables 9 and 10). The manufacturing industry experienced the largest loss of jobs in both the County and the City. While the County lost 25 percent of its manufacturing jobs between 2002 and 2010, the City of Jamestown lost 43 percent (or 1,620) of its

manufacturing jobs. Still, despite these significant losses, 16 percent of city jobs are in the manufacturing industry making it the second largest employment generator within the City. The second hardest hit industry within the City of Jamestown was retail trade. An additional 542 retail jobs were lost in the City.

Table 8. Jamestown City Share of Chautauqua County Jobs - 2010

| | County Jobs | Jamestown City Share |
|--|--------------------|-----------------------------|
| Agriculture, Forestry, Fishing and Hunting | 434 | 0% |
| Mining, Quarrying, and Oil/Gas Extraction | 170 | 28% |
| Utilities | 214 | 7% |
| Construction | 1,263 | 18% |
| Manufacturing | 9,419 | 23% |
| Wholesale Trade | 1,039 | 27% |
| Retail Trade | 5,434 | 21% |
| Transportation and Warehousing | 1,113 | 24% |
| Information | 625 | 40% |
| Finance and Insurance | 804 | 38% |
| Real Estate | 446 | 28% |
| Professional, Scientific, and Technical Services | 860 | 40% |
| Management of Companies | 112 | 36% |
| Admin Support & Waste Management | 2,247 | 57% |
| Educational Service | 5,372 | 27% |
| Health Care and Social Services | 7,174 | 52% |
| Arts, Entertainment and Recreation | 396 | 64% |
| Accommodations and Food Services | 3,569 | 20% |
| Other Services (exc. Public Admin) | 1,861 | 35% |
| Public Admin | 3,342 | 8% |
| Total | 45,894 | 34% |

Source: U.S. Census; W-ZHA

On the positive side, the health care and social services industry grew substantially between 2002 and 2010, making it by far the largest employment generator within the City of Jamestown. Nearly three in ten jobs within the City are in this industry. Employing 3,725 individuals in 2010, the City's health care and social services industry grew by 852 jobs between 2002 and 2010. Anchoring the health care industry is the WCA Hospital which employs approximately 1,150 people at a variety of skill levels and the Resource Center which employs approximately 1,700 people (throughout the entire County) also at a variety of skill levels. As is true in many communities, these employers are very important economic anchors that not only employ residents, but service the health and social needs of the community. The City of Jamestown's administration support and waste management industry also experienced significant growth between 2002 and 2010 gaining 774 jobs.

Table 9. Primary Job Trends - Chautauqua County - 2002-2010

| | 2002 | | 2010 | | Change | |
|--|---------------|----------------|---------------|----------------|----------------|------------|
| | Jobs | Share of Total | Jobs | Share of Total | # | % |
| Agriculture, Forestry, Fishing and Hunting | 439 | 1% | 434 | 1% | (5) | -1% |
| Mining, Quarrying, and Oil/Gas Extraction | 156 | 0% | 170 | 0% | 14 | 9% |
| Utilities | 289 | 1% | 214 | 0% | (75) | -26% |
| Construction | 1,287 | 3% | 1,263 | 3% | (24) | -2% |
| Manufacturing | 12,498 | 26% | 9,419 | 21% | (3,079) | -25% |
| Wholesale Trade | 1,447 | 3% | 1,039 | 2% | (408) | -28% |
| Retail Trade | 5,853 | 12% | 5,434 | 12% | (419) | -7% |
| Transportation and Warehousing | 1,245 | 3% | 1,113 | 2% | (132) | -11% |
| Information | 714 | 1% | 625 | 1% | (89) | -12% |
| Finance and Insurance | 711 | 1% | 804 | 2% | 93 | 13% |
| Real Estate | 362 | 1% | 446 | 1% | 84 | 23% |
| Professional, Scientific, and Technical Services | 1,021 | 2% | 860 | 2% | (161) | -16% |
| Management of Companies | 238 | 0% | 112 | 0% | (126) | -53% |
| Admin Support & Waste Management | 1,179 | 2% | 2,247 | 5% | 1,068 | 91% |
| Educational Service | 5,652 | 12% | 5,372 | 12% | (280) | -5% |
| Health Care and Social Services | 5,662 | 12% | 7,174 | 16% | 1,512 | 27% |
| Arts, Entertainment and Recreation | 536 | 1% | 396 | 1% | (140) | -26% |
| Accommodations and Food Services | 3,808 | 8% | 3,569 | 8% | (239) | -6% |
| Other Services (exc. Public Admin) | 1,919 | 4% | 1,861 | 4% | (58) | -3% |
| Public Admin | 3,918 | 8% | 3,342 | 7% | (576) | -15% |
| Total | 48,934 | | 45,894 | | (3,040) | -6% |

Source: U.S. Census; W-ZHA

Table 10. Primary Job Trends – City of Jamestown - 2002-2010

| | 2002 | | 2010 | | Change | |
|--|---------------|----------------|---------------|----------------|--------------|------------|
| | Jobs | Share of Total | Jobs | Share of Total | # | % |
| Agriculture, Forestry, Fishing and Hunting | 24 | 0% | 1 | 0% | (23) | -96% |
| Mining, Quarrying, and Oil/Gas Extraction | 12 | 0% | 48 | 0% | 36 | 300% |
| Utilities | 38 | 0% | 16 | 0% | (22) | -58% |
| Construction | 184 | 1% | 228 | 2% | 44 | 24% |
| Manufacturing | 3,750 | 26% | 2,130 | 16% | (1,620) | -43% |
| Wholesale Trade | 343 | 2% | 283 | 2% | (60) | -17% |
| Retail Trade | 1,697 | 12% | 1,155 | 9% | (542) | -32% |
| Transportation and Warehousing | 232 | 2% | 266 | 2% | 34 | 15% |
| Information | 352 | 2% | 252 | 2% | (100) | -28% |
| Finance and Insurance | 280 | 2% | 304 | 2% | 24 | 9% |
| Real Estate | 122 | 1% | 124 | 1% | 2 | 2% |
| Professional, Scientific, and Technical Services | 438 | 3% | 342 | 3% | (96) | -22% |
| Management of Companies | 40 | 0% | 40 | 0% | 0 | 0% |
| Admin Support & Waste Management | 514 | 4% | 1,288 | 10% | 774 | 151% |
| Educational Service | 1,349 | 9% | 1,432 | 11% | 83 | 6% |
| Health Care and Social Services | 2,873 | 20% | 3,725 | 28% | 852 | 30% |
| Arts, Entertainment and Recreation | 210 | 1% | 253 | 2% | 43 | 20% |
| Accommodations and Food Services | 765 | 5% | 731 | 5% | (34) | -4% |
| Other Services (exc. Public Admin) | 657 | 5% | 652 | 5% | (5) | -1% |
| Public Admin | 413 | 3% | 253 | 2% | (160) | -39% |
| Total | 14,293 | | 13,523 | | (770) | -5% |

Source: U.S. Census; W-ZHA

Despite decreases in employment levels over the past few decades, Moody's Analytics (which produces at-place employment projections by industry) projects

that Chautauqua County's employment will increase by eight percent between 2010 and 2020 (see Table 11). This represents an important turn-around from the last ten years. Employment in health care and social services is projected to continue to grow at a rapid pace. While manufacturing is projected to lose employment, the rate of employment loss is projected to be slower in the coming decade than it has been. Significant employment gains are projected in the accommodations and food service industries.

Table 11. Employment Projections – Chautauqua County - 2010-2020

| Industry | % Change |
|--|-----------|
| Agriculture, Forestry, Fishing and Hunting | n/a |
| Mining, Quarrying, and Oil/Gas Extraction | 0% |
| Utilities | -9% |
| Construction | 23% |
| Manufacturing | -8% |
| Wholesale Trade | 6% |
| Retail Trade | -1% |
| Transportation and Warehousing | 0% |
| Information | 14% |
| Finance and Insurance | 8% |
| Real Estate | 2% |
| Professional, Scientific, and Technical Services | 7% |
| Management of Companies | -4% |
| Admin Support & Waste Management | 23% |
| Educational Service | 12% |
| Health Care and Social Services | 22% |
| Arts, Entertainment and Recreation | 10% |
| Accommodations and Food Services | 17% |
| Other Services (exc. Public Admin) | 8% |
| Public Admin | 5% |
| Total | 8% |

Source: Moody's Analytics; W-ZHA

Sales, Marketing & Management, Inc. tracks retail sales over time through their "Survey of Buying Power". The most recent Survey data is from 2009. Table 12 summarizes retail sales for Chautauqua County and the City of Jamestown.¹ The sales are presented in 2000 dollars in order to show real change (net of inflation).

Due to substantial losses in motor vehicle parts and dealers sales, the City of Jamestown experienced a four percent decrease in retail sales between 2000 and 2009 while Chautauqua County's retail sales increased five percent over the same time period. Sales in motor vehicles and parts declined significantly in both Chautauqua County (a 55% decrease) and the City of Jamestown (a 60% decrease). The County saw sales in food and beverage increase significantly (a 52% increase) as did the City (a 40% increase). The City's retail sales increased in eating and drinking,

¹ Not all retail categories are included, therefore the sub categories in the table do not add up to the total amount.

general merchandise, and furniture and appliances over this timeframe as well. Where City eating and drinking sales accounted for 21 percent of the County's eating and drinking sales in 2000, this value has increased to 24 percent nine years later.

Table 12. Chautauqua County and the City of Jamestown Retail Sales - 2000 - 2009

| | 2000 | 2009* | Change | |
|--------------------------------|---------------|-----------------|-----------------|-------|
| | | | # | % |
| Chautauqua County | | | | |
| Total | \$134,240,400 | \$1,412,870,000 | \$1,278,629,600 | 5% |
| Grocery Food & Beverage | \$164,710,000 | \$250,689,000 | \$85,979,000 | 52% |
| Eat & Drink | \$108,844,000 | \$109,139,000 | \$295,000 | 0% |
| General Merchandise | \$235,535,000 | \$233,771,000 | (\$1,764,000) | -1% |
| Furniture & Appliances | \$29,147,000 | \$16,165,000 | (\$12,982,000) | -45% |
| Motor Vehicles Parts & Dealers | \$461,201,000 | \$205,273,000 | (\$255,928,000) | -55% |
| City of Jamestown | | | | |
| Total | \$372,926,000 | \$359,626,000 | (\$13,300,000) | -4% |
| Grocery Food & Beverage | \$48,795,000 | \$68,494,000 | \$19,699,000 | 40% |
| Eat & Drink | \$23,189,000 | \$26,638,000 | \$3,449,000 | 15% |
| General Merchandise | \$0 | \$22,577,000 | \$22,577,000 | 100%+ |
| Furniture & Appliances | \$5,182,000 | \$5,925,000 | \$743,000 | 14% |
| Motor Vehicles Parts & Dealers | \$228,999,000 | \$92,173,000 | (\$136,826,000) | -60% |

* 2009 sales have been adjusted for inflation. The 2009 sales are in 2000 dollars.

Source: Sales, Marketing & Management; W-ZHA

The tourism market has been hurt by the recession, and the Chautauqua County Visitors Bureau's "Tourism Performance Measure: 2007-2011" report states, "One traditional metric of tourism activity is the number of Visitor (Information) packets mailed out. CCBV reached a high of 27,181 in 2008, which was the strongest year on record for tourism nationally, and on a state level. Information requests declined during the early recession (2009), and then dropped more significantly during 2010 as CCBV marketing resources decreased due to State and County cutbacks, forced by the recession. As State funding for marketing resumed and county funding via the occupancy tax increased somewhat in 2011, CCBV achieved resurgence in visitor information requests. As of 2011 the number of Visitor Information packets mailed out is virtually equal to the (prior) five year average of 23,142."

Despite these numbers, the Chautauqua County Visitor's Bureau concludes, overall, that the tourism industry is growing two to three percent per year.

According to the Chautauqua County Visitor's Bureau, local franchise hotels have been maintaining close to 50 percent occupancy over the last three years with higher occupancy rates in the summer and fall months offsetting lower rates in the winter and spring months. Franchise hotel revenue has increased over the last three years from approximately \$22 million in 2009 to \$25.5 million in 2011. It appears that the tourism economy is relatively stable.

BOA SUB AREAS

To facilitate analysis, the Chadakoin River Central/Eastern Study Area was divided into three sub-areas or districts as shown in Figure 7. This division was necessary because the BOA was relatively large and the character, needs, building types, land use composition and business mix varied within the BOA. Separating the districts was especially important in aligning the feasible uses identified in the Economic and Market Analysis with the appropriate buildings, sites and neighborhoods. It was also important in the selection and analysis of appropriate catalyst areas and sites. However, it should be noted that, due to the City's development history, the Study Area's composition is more complex than the three areas listed below and each sub-area contains elements of the other sub-areas. Additionally, the listed sub-areas could be broken down further but, for the sake of this planning effort, three primary areas were selected.

The three Chadakoin River Central/Eastern Study sub-areas include:

1. **Downtown District** – this area stretches from McCrea Point Park to Winsor Street, from 4th Street to Steele/Washington/Allen Street and includes the City's Downtown Core and Brooklyn Square.
2. **Industrial Heritage Corridor** – this area stretches from Winsor Street to the east side of the Dahlstrom Complex, from 2nd Street to Allen Street and includes many historic manufacturing facilities which are currently either vacant or underutilized.
3. **East End Industrial Corridor** – this area stretches from the east side of the Dahlstrom Complex to Tiffany Avenue (the eastern City boundary), from 2nd Street to Buffalo Street and includes many modern manufacturing facilities which are currently underutilized or fully active.



Sub Areas

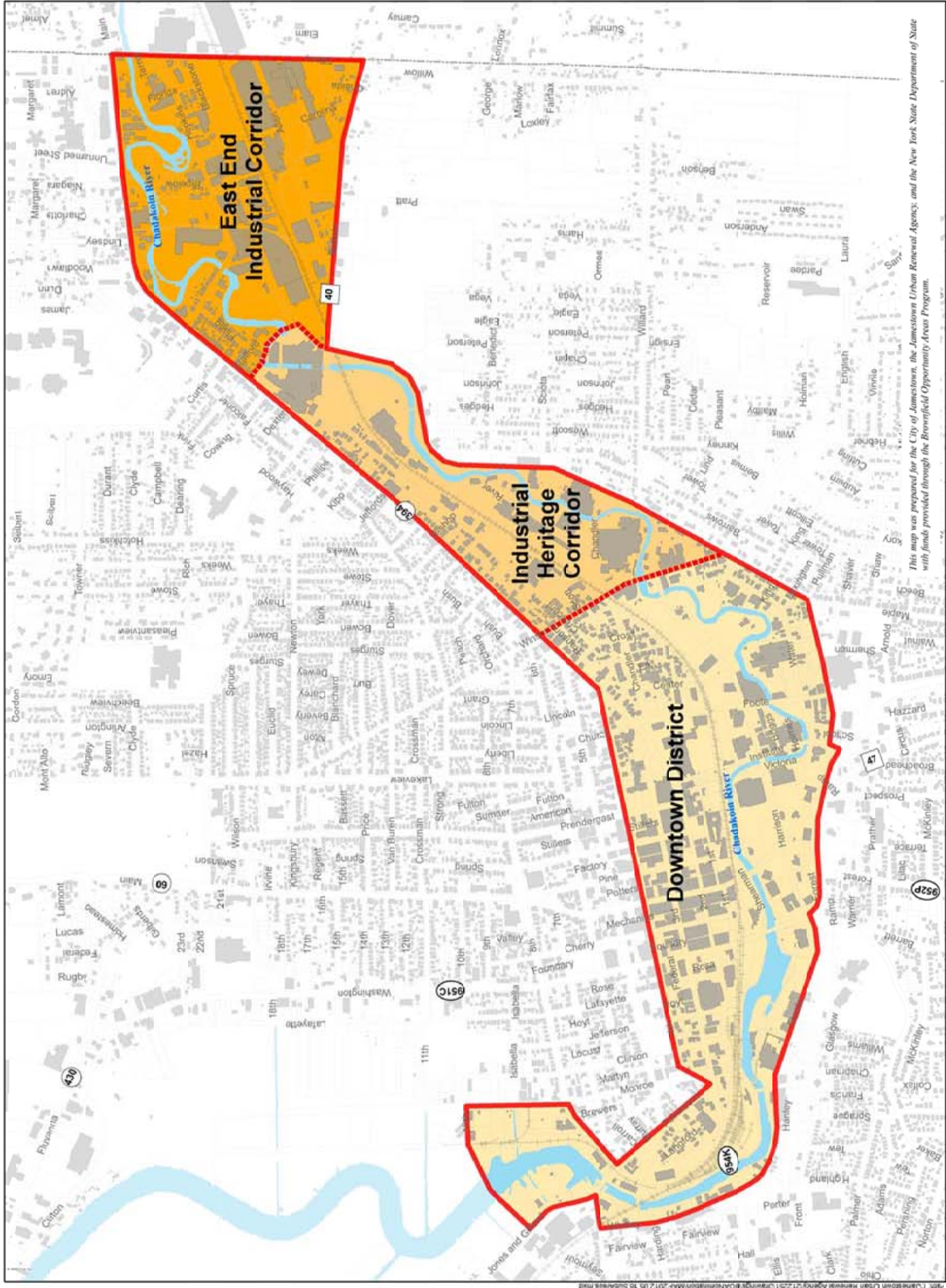
- BOA Nomination Study Area
- Sub Area Boundaries
- Sub Areas**
 - Downtown District
 - Industrial Heritage Corridor
 - East End Industrial Corridor

Source:
Official BOA Shading provided by the
City of Jamestown. Edited by Labela to
reflect steering committee revisions



Labela Project No:
212251

Figure 7. Sub Area Map



This map was prepared for the City of Jamestown, the Jamestown Urban Renewal Agency, and the New York State Department of State with funds provided through the Brownfield Opportunity Areas Program.

