
FISCAL AND ECONOMIC IMPACT SUMMARY ANALYSIS

National Grid Site, Spagnoli Road

Melville, New York

NP&V No. 19306

Prepared for:

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1.0 INTRODUCTION

Nelson, Pope & Voorhis, LLC (NPV) has been requested to prepare a fiscal and economic impact summary for an industrial development at the former National Grid site on Spagnoli Road in Melville, New York. NP&V is a professional environmental and planning firm with qualifications and expertise to prepare fiscal and economic impact analyses, and has a track record of similar completed projects, as well as market analysis and related economic development services to private and municipal clients. The economic qualifications of the firm and personnel are provided in **Attachment A**.

This analysis examines the fiscal and economic impacts that are anticipated to occur through the construction and annual operations of an office and warehouse/distribution center, located along Spagnoli Road, east of Hub Drive and west of Broadhollow Road (Route 110), in the hamlet of Melville, Town of Huntington, Suffolk County, New York. The location is more specifically described by Suffolk County Tax Map ID number 0400-266.00-01.00-007.003.¹

The industrial real estate market is tight, with very limited available inventory in Suffolk County. These market conditions are stunting industrial growth in the region and local planning documents recognize this need. The industrial development at Spagnoli Road is responsive to this need for increased employment and quality industrial opportunities in the area, and will help the area remain competitive as a major employment hub in the region. This is recognized in both the *Melville Employment Center Plan*, as well as the *Horizons 2020: Town of Huntington Comprehensive Plan* and evidenced by current conditions within the surrounding community at the time of construction. The project provides a positive contribution toward addressing industrial demand in the Town, through the annual operations of office space, warehouse and distribution space totaling approximately 411,000 square feet (SF). This new building will provide expansion opportunities for existing regional users looking to expand and to those companies looking to enter the Long Island market.

As economic stability returns following the coronavirus pandemic of 2020, the proposed project is expected to contribute to the long-term economic health of the community. The proposed industrial development will create strong economic activity by providing a significant number of jobs and will provide a solid tax base upon completion and full taxation of the project. Consumer activity will ripple through the local community, creating beneficial fiscal and economic impacts throughout the Town of Huntington, Suffolk County, and the region as a whole.

The following analysis examines and quantifies the fiscal and economic impacts that are anticipated to result from the new office, warehouse and distribution facility. It is noted that

¹ It is important to note that this parcel will be retired as of the 2020-21 tax year. A new tax parcel will be created, described by the Suffolk County Tax Map as 0400-266.00-01.00-014.005.

this analysis is based on conditions prior to the coronavirus pandemic and, therefore, represent conditions in anticipation of stabilization of the economy in post-pandemic conditions. **Section 2.0** outlines the methodology and the sources of data used to project the fiscal and economic impacts generated in this analysis. **Section 3.0** summarizes the existing fiscal and economic conditions – including, local budgets and the current tax rates and levies for the Town of Huntington, Suffolk County, as well as the Half Hollow Hills Central School District (CSD). Moreover, this section summarizes the fiscal impacts that are anticipated to result from the industrial development. These include beneficial impacts to the local school district, as well as the generation of annual property tax revenues allocated to each of the taxing jurisdictions located within the boundary of the site, upon full taxation and based on current tax dollars. This information is useful in understanding the future tax benefit. **Section 4.0** presents a summary of the direct economic impacts, as well as those indirect and induced impacts that are estimated to occur – on output, employment and labor income – during both the 14- to 16-month construction period and annually upon a stabilized year of operations of the industrial development. As previously noted, these projections anticipate stabilization of the economy in post-pandemic conditions. **Section 5.0** outlines the references and sources of information utilized in this analysis.

2.0 METHODOLOGY

Various data and information from federal, state, local, and industrial data sources was used to analyze the existing conditions and projected fiscal and economic impacts stemming from the construction and annual operation of the industrial development at Spagnoli Road.

Hartz Mountain Industries, Inc. supplied information regarding the square footage, construction cost and construction schedule, estimated rental rates, employment and labor income during annual operations of the industrial development.

Half Hollow Hills CSD provided data pertaining to the district budget and enrollment trends.

The Town of Huntington and Suffolk County provided information regarding approved budgets and current tax rates for the subject property. This tax information was used to compare the existing revenues to those that are projected to be generated upon full build-out and full taxation of the industrial development.

New York State Education Department provides New York State District Report Cards and the Fiscal Accountability Summary reports specific to the Half Hollow Hills CSD. This information allows for an understanding of how the development may affect the school district.

United States Bureau of Labor Statistics and New York State Department of Labor publish the Occupational Employment Statistics survey and the Quarterly Census of Employment and Wages. The Occupational Employment Statistics survey was used to estimate the wages earned among those employed within “construction and extraction” occupations in the Long Island labor market. These wages were assumed for each of the workers responsible for the construction of the industrial development.

United States Census Bureau provides the latest population counts and other pertinent demographic data for the Town of Huntington, as well as school enrollment data specific to the Half Hollow Hills CSD.

IMPLAN (formerly known as the Minnesota IMPLAN Group) developed an economic impact modeling system called IMPLAN, short for “impact analysis for planning”. The program was developed in the 1970s through the United States Department of Agriculture’s Forest Service, and was privatized in 1993.

IMPLAN is built on a mathematical input-output (I-O) model to express relationships between various sectors of the economy in a specific geographic location. The I-O model assumes fixed relationships between producers and their suppliers based on demand, and the inter-industry relationships within a region largely determine how that economy will respond to change. In an I-O model, the increase in demand for a certain product or service causes a multiplier effect; increased demand for a product affects the producer of the product, the producer’s employees,

the producer's suppliers, the supplier's employees, and so on, ultimately generating a total impact in the economy that is greater than the initial change in demand.

The IMPLAN model is a method for estimating local economic multipliers, including those pertaining to production, value-added, employment, wage and supplier data. IMPLAN differentiates in its software and data sets between 546 sectors that are recognized by the United States Department of Commerce. Multipliers are available for all states, counties and zip codes, and are derived from production, employment and trade data from sources including the United States Census Bureau, County Business Patterns, Annual Survey of Government Employment, Annual Survey of Retail Trade; United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Consumer Expenditure Survey; United States Department of Labor; Office of Management and Budget; United States Department of Commerce; Internal Revenue Service; United States Department of Agriculture, National Agricultural Statistical Service; Federal Procurement Data Center; and United States Bureau of Economic Analysis, Regional Economic Information System, Survey of Current Business, among other national, regional, state and local data sources.

IMPLAN is widely accepted as the industry standard for estimating how much a one-time or sustained increase in economic activity in a particular region will be supplied by industries located in the region. Federal government agencies such as the Army Corps of Engineers, Bureau of Economic Analysis, Bureau of Land Management, Environmental Protection Agency, Federal Reserve Bank, Fish and Wildlife Service, and National Park Service have used the multipliers to study the local impact of government regulation on specific industries and to assess the local economic impacts of Federal actions. State and local governments including New York State Department of Labor, New York State Division of the Budget, New York State Office of the State Comptroller, New York State Assembly and New York City Economic Development Corporation, have used the multipliers to estimate the regional economic impacts of government policies and projects and of events, such as the location of new businesses within their state, or to assess the impacts of tourism. Likewise, businesses, universities and private consultants have used the multipliers to estimate the economic impacts of a wide range of projects, such as building a new sports facility or expanding an airport; of natural disasters; of student spending; or of special events, such as national political conventions.

NP&V personnel have received formal training through IMPLAN and possess the qualifications to project economic impacts for a multitude of project types using this software. For the purpose of this analysis, multipliers specific to socio-economic data in Suffolk County's "Construction of new manufacturing structures" industry were analyzed to determine the direct, indirect and induced economic impacts during the construction period of the industrial development. Moreover, multipliers specific to socio-economic data in Suffolk County's "Warehousing and storage" industries were analyzed to determine the direct, indirect and induced economic impacts during the annual operations of the industrial development. A summary of these economic impacts can be found in **Section 3.0** of this analysis.

3.0 SUMMARY OF FISCAL AND ECONOMIC IMPACTS

As noted in **Section 1.0**, this analysis summarizes the existing conditions and the fiscal and economic impacts that are associated with the construction and annual operations of the 411,000 SF industrial development at Spagnoli Road. Fiscal impacts include the generation of property tax revenues and their distribution among local taxing jurisdictions, upon full taxation of the property. Economic impacts include direct, indirect and induced benefits on output, employment and associated labor income during the construction phase and during a stabilized year of annual operations. It is noted that these analyses are based on conditions prior to the coronavirus pandemic and, therefore, represent conditions in anticipation of commencement of construction as restrictions are lifted and stabilization of the economy in post-pandemic conditions.

The industrial real estate market is tight, with very limited available inventory in Suffolk County. These market conditions are stunting industrial growth in the region, and local planning documents recognize this need. The industrial development at Spagnoli Road is responsive to this need for increased quality industrial opportunities in the area, as recognized in comprehensive planning documents and evidenced by local economic development reports. The project provides a positive contribution toward addressing industrial demand in the Town, through the annual operations of office space, warehouse and distribution space totaling approximately 411,000 square feet (SF). This new building will provide expansion opportunities for existing regional users looking to expand and to those companies looking to enter the Long Island market.

The Applicant will be applying to the Suffolk County Industrial Development Agency (SCIDA) to participate in its Payment in Lieu of Tax (PILOT) program, as well as for other tax benefits. Upon full taxation, the subject property will increase the distribution of tax ratables throughout the Half Hollow Hills CSD, the Town of Huntington, and Suffolk County, when compared to existing conditions. Moreover, the industrial development will generate immediate construction jobs as well as permanent employment opportunities for Town and area residents. Such fiscal and economic benefits are most crucial to a sustainable local economy and the economic well-being of Long Island, New York State and the nation as a whole.

A summary of findings is provided herein, with detailed methodologies and references provided throughout this analysis. This analysis was prepared using methods, data and information that are considered to be industry standard for such fiscal and economic impact analyses.

3.1 Definition of Economic Impacts

A *direct impact* arises from the first round of buying and selling. These direct impacts can be used to identify additional rounds of buying and selling for other sectors of the economy and to identify the impact of spending by local households. An *indirect impact* refers to the increase in

sales of other industry sectors, which include further round-by-round sales. An *induced impact* accounts for the changes in output and labor income by those employed within the region, resulting from direct and indirect impacts. The *total impact* is the sum of the direct, indirect and induced impacts.

3.2 Key Findings

3.2.1 Existing Conditions

- According to the U.S. Census Bureau, and in 2017, there were an estimated 204,011 persons residing within 75,381 housing units in the Town of Huntington.²
- The majority of parcels in the Town of Huntington are taxed as residential properties, comprising 86.4% of the total parcels. However, such properties comprise 68.5% of the Town's tax base, and place the greatest burden on community services. Industrial properties account for 0.1% of total land use and 0.7% of the tax base.³
- The Town of Huntington adopted an operating budget for the 2019-20 fiscal year, with budgeted expenditures of \$205.7 million, revenues of nearly \$205.0 million and an unassigned fund balance of \$725,000.⁴
- Suffolk County adopted a 2019-20 operating budget with expenditures of \$3.2 billion and revenues of \$4.0 billion.⁵
- Prior to the coronavirus pandemic, unemployment had been decreasing substantially since its peak in 2010-2012. As of March 2020, approximately 3,900 persons – 3.7% of the Town's labor force, are unemployed. While it is important to note that this data has not been seasonally adjusted, such trends are nonetheless lower than Suffolk County, Long Island, and statewide unemployment rates at that time.⁶
- The industrial development is located within the boundaries of the Half Hollow Hills CSD. Estimates published by the U.S. Census Bureau suggest that 95.8% of all school-aged children who are enrolled in school and reside within the school district boundaries attended public schools; the remaining 4.2% of school-aged children attended private schools.⁷
- Student enrollment within the Half Hollow Hills CSD has decreased by 2,201 students (-21.9%), over the ten (10) years between the 2009-10 academic year and the 2018-19 academic year.⁸
- According to the New York State School Report Card Fiscal Accountability Summary for

² 2013-2017 American Community Survey 5-Year Estimates, via the U.S. Census Bureau.

³ New York State Office of Real Property Tax Services, 2018 Annual Assessment Rolls, 2018 Parcel Counts by Individual Property Class Code.

⁴ Town of Huntington, "Town of Huntington 2020 Tentative Budget", 2019.

⁵ Suffolk County, "2020 Recommended Operating Budget: Narrative Summary, Volume 1" 2019.

⁶ New York State Department of Labor

⁷ 2014-2018 American Community Survey 5-Year Estimates, via the U.S. Census Bureau.

⁸ New York State Department of Education.

the Half Hollow Hills CSD, expenditures averaged \$16,114 per general education student and \$34,877 per special education student during the 2017-18 academic year. During this year, 1,634 students, or 17.1% of the students within Half Hollow Hills CSD, were enrolled in the special education program.⁹

- The Half Hollow Hills CSD adopted a balanced budget for the 2019-20 academic year, with revenues and expenditures totaling \$259.8 million.¹⁰
- The subject property is seeking SCIDA assistance through a PILOT program, among other tax incentives. As of the date of the submission of this analysis, the terms of this agreement have not yet been negotiated.
- Under existing conditions property owners within this part of the Town are currently taxed at a rate of \$337.534 per \$100 assessed valuation. Such tax rates include taxes paid to the Town of Huntington, Half Hollow Hills CSD and Suffolk County, as well as other local taxing jurisdictions located within the boundary of the site.¹¹ The existing distribution of tax revenues is shown in **Table 1**.

TABLE 1
EXISTING TAX REVENUES

Taxing Jurisdiction	Current Tax Rate (per \$100 Assessed Valuation)	Current Tax Revenue	Percent of Total Tax Revenue
Total: School Tax	235.006	\$110,453	69.6%
Half Hollow Hills School District	225.916	\$106,181	66.9%
Half Hollow Hills Library District	9.090	\$4,272	2.7%
Total: County Tax	47.498	\$22,324	14.1%
County	2.711	\$1,274	0.8%
County Police District	43.854	\$20,611	13.0%
Out of County Tuition	0.933	\$439	0.3%
Total: Town Tax	28.360	\$13,329	8.4%
Town/Part Town	15.393	\$7,235	4.6%
Highway Tax	11.770	\$5,532	3.5%
Lighting District- Town Wide	1.197	\$563	0.4%
Total: Other Tax	26.670	\$12,535	7.9%
New York State Real Property Tax Law	5.041	\$2,369	1.5%
Open Space	0.464	\$218	0.1%
New York State MTA Tax	0.149	\$70	0.0%
Melville Fire District (Industrial)	15.706	\$7,382	4.7%
Water District - Spagnoli Road Ext.	5.310	\$2,496	1.6%
TOTAL: ALL TAXING JURISDICTIONS	337.534	\$158,641	100.0%

Source: Town of Huntington Receiver of Taxes; Analysis by Nelson, Pope & Voorhis, LLC.

⁹ New York State Department of Education.

¹⁰ Half Hollow Hills CSD.

¹¹ Town of Huntington Receiver of Taxes.

3.2.2 General Impacts

- The proposed project is industrial in nature, and there are no residential units proposed for development. As such, there will be no increase in the general population, or the population of school-aged children directly related to the development of this project.

3.2.3 Anticipated Fiscal Impacts

- For taxing purposes, the total estimated market valuation of the office, warehouse and distribution facility is based upon monthly rental rates per square foot. As seen in **Table 2**, these assume an average rental rate of \$15/square foot. These competitive rental rates will be quite attractive for existing regional users looking to expand and to those companies looking to enter the Long Island market, and serve to bolster the regional industrial economy on Long Island.

**TABLE 2
PROJECTED GROSS RENT**

Parameter	Value
Size (SF)	411,000 SF
Rental Rate	\$15/SF
Annual Rent	\$6,165,000

Source: Hartz Mountain Industries, Inc.; Analysis by Nelson, Pope & Voorhis, LLC.

- Total gross rent for the entire 411,000 SF industrial development is over \$6.1 million. After applying estimated loss from vacancies of 5%, as well as an estimated expense ratio of 20% for industrial use, a capitalization rate of 0.1 and a 2019-20 equalization rate of 0.76%, the estimated assessed valuation of the industrial development upon full build-out and occupancy is approximately \$351,405. This is shown in **Table 3**.
- **Table 4** presents the anticipated tax revenue generation and the distribution of these revenues among the various taxing jurisdictions based on data in **Tables 1, 2 and 3**.

**TABLE 3
PROJECTED ASSESSED VALUATION**

Parameter	Value
Gross Annual Rents	\$6,165,000
Estimated Loss from Vacancies	5%
Expense Ratio	20%
Net Income	\$4,623,750
Capitalization Rate	0.1
Estimated Market Value	\$46,237,500
2018-19 Equalization Rate	0.76%
Assessed Value: Proposed Project	\$351,405

Source: Hartz Mountain Industries, Inc.; Analysis by Nelson, Pope & Voorhis, LLC.

- Given the estimated assessed valuation of \$351,405, and when applying to current tax and equalization rates, the proposed project is projected to generate over \$1.1 million in annual property taxes at full build-out and full taxation of the property, and without consideration of any PILOT agreement. This represents a net increase of over \$1.0 million per year, when compared to existing site conditions. The distribution of tax revenues is shown in **Table 4**.
- Fiscal impacts are projected based on full build-out and full taxation based on current assessments and projected revenues. It is noted that any tax deferral programs will delay and phase-in full taxation. The projection of tax revenues is useful in determining existing, PILOT and future taxation to assist with an understanding of existing and future taxes to assist the SCIDA in decision-making.
- As seen in **Table 4**, the industrial development is anticipated to levy tax revenues for the Half Hollow Hills CSD, estimated to total approximately \$715,370 per year upon full taxation. As there are no anticipated increases to the school-aged population as a result of this development, the additional net revenue could ease the district's need to tap into additional fund balances and could also help alleviate an increased burden on other taxpayers throughout the district.

TABLE 4
ANTICIPATED TAX REVENUE GENERATION

Taxing Jurisdiction	Current Tax Revenue	Projected Tax Revenue	Change in Tax Revenue	Percent of Total Tax Revenue
Total: School Tax	\$110,453	\$825,823	\$715,370	69.6%
Half Hollow Hills School District	\$106,181	\$793,880	\$687,700	66.9%
Half Hollow Hills Library District	\$4,272	\$31,943	\$27,670	2.7%
Total: County Tax	\$22,324	\$166,910	\$144,586	14.1%
County	\$1,274	\$9,527	\$8,252	0.8%
County Police District	\$20,611	\$154,105	\$133,494	13.0%
Out of County Tuition	\$439	\$3,279	\$2,840	0.3%
Total: Town Tax	\$13,329	\$99,658	\$86,329	8.4%
Town/Part Town	\$7,235	\$54,092	\$46,857	4.6%
Highway Tax	\$5,532	\$41,360	\$35,828	3.5%
Lighting District- Town Wide	\$563	\$4,206	\$3,644	0.4%
Total: Other Tax	\$12,535	\$93,720	\$81,185	7.9%
New York State Real Property Tax Law	\$2,369	\$17,714	\$15,345	1.5%
Open Space	\$218	\$1,631	\$1,412	0.1%
New York State MTA Tax	\$70	\$524	\$454	0.0%
Melville Fire District (Industrial)	\$7,382	\$55,192	\$47,810	4.7%
Water District - Spagnoli Road Ext.	\$2,496	\$18,660	\$16,164	1.6%
TOTAL: ALL TAXING JURISDICTIONS	\$158,641	\$1,186,111	\$1,027,470	100.0%

Source: Town of Huntington Receiver of Taxes; Analysis by Nelson, Pope & Voorhis, LLC.

3.2.4 Economic Impacts of Construction

A detailed analysis of direct, indirect and induced impacts generated during the construction period is outlined below. It is important to note that each of these impacts are temporary and are projected to occur only while the industrial development is being constructed. As previously noted, these projections anticipate stabilization of the economy in post-pandemic conditions.

- For the purpose of this analysis, it is anticipated that construction of the industrial development will commence in early 2021, with the construction period occurring over a period of 14- to 16-months, culminating in early/mid-2022.¹²

¹² Construction schedule provided by Hartz Mountain Industries, Inc., in October 2019. A range of 14- to 16-months is scheduled, and for the purpose of this analysis, an average of 15 months was assumed.

- The industrial development is projected to represent approximately \$52 million¹³ in construction costs over the 14- to 16-month construction period.¹⁴ This \$52 million in direct annual output is projected to generate an indirect impact of over \$12.2 million, and an induced impact of an additional \$14.9 million, bringing the total economic impact output to over \$79.1 million during the 14- to 16-month construction period.¹⁵
- During the construction period, direct employment refers to the number of short-term jobs necessary to complete the construction of the industrial development. Assuming that 40% of the construction costs are attributed to labor, and when the total labor costs of \$20.8 million are divided by the mean annual wage for construction and extraction occupations on Long Island (\$67,550 per year, as reported by New York State Department of Labor's Occupational Employment Statistics survey), and adjusted for inflation to reflect the projected wages anticipated at the commencement of the construction period at the beginning of 2021 (\$71,664 per year assumes an annual three percent inflation factor), it is assumed that the construction period will generate 232.2 jobs. When further applying a conversion factor of 0.967151319 (per the IMPLAN software, specific to IMPLAN Sector 51: 'Construction of new manufacturing structures' in Suffolk County, New York) to adjust these jobs to full-time equivalent (FTE) employees, it is estimated that the construction period will generate 224.6 FTE jobs, which are anticipated to last the entire duration of the 14- to 16-month construction period for the purpose of this analysis.
- The 224.6 FTE jobs created during the construction period will have an indirect impact of 55.1 FTE employees and an induced impact of 91.7 FTE employees in other industry sectors, bringing the total impact of the 14- to 16-month construction period to 371.4 FTE jobs.¹⁶ This job creation – direct, as well as indirect and induced – is most crucial to Long Island's economic well-being, and presents opportunities for persons who remain unemployed throughout the region.
- During the construction period, direct labor income refers to the annual earnings, wages, or salary paid to each of the workers responsible for the construction of the industrial development. As previously noted, labor income typically comprises approximately 40% of the cost of industrial construction; the remaining portion represents the cost of materials.¹⁷

¹³ For the purpose of this analysis, this figure and all other figures in the construction portion of this analysis reflect 2021 dollars, the year for which construction is anticipated to commence.

¹⁴ Construction costs provided by Hartz Mountain Industries, Inc., in October 2019.

¹⁵ According to IMPLAN, a multiplier of 1.639897 represents the total dollar change in output that occurs in all industries for each additional dollar of output delivered to final demand through the "Construction of new manufacturing structures" (IMPLAN Sector 51) in Suffolk County, New York.

¹⁶ According to IMPLAN, a multiplier of 9.807821 represents the total change in the number of jobs that occurs in all industries for each additional one million dollars of output delivered to final demand through the "Construction of new manufacturing structures" (IMPLAN Sector 51) in Suffolk County, New York.

¹⁷ Construction/renovations labor and materials estimates per architectural design group Nelson + Pope.

- Labor income is projected to total \$71,664 per year, per employee.¹⁸ When applied to the 14- to 16-month construction period, this represents approximately \$89,580 per employee, and \$20.8 million in collective earnings among the 224.6 FTE employees. This labor income is projected to have an indirect impact of over \$4.4 million and an induced impact of over \$5.2 million, bringing the total economic impact of the 14- to 16-month construction period to over \$30.4 million in labor income.¹⁹

A summary of key economic findings projected to occur during the 14- to 16-month construction period is provided in **Table 5**.

TABLE 5
SUMMARY OF KEY ECONOMIC FINDINGS
DURING 14- TO 16-MONTH CONSTRUCTION PERIOD

Impact Type	Output (Total Revenue) ²⁰	Employment (Total Number of FTE Jobs) ²¹	Labor Income (Total Wages and Benefits)
Direct Impact	\$52,000,000	224.6	\$20,800,000
Indirect Impact	\$12,208,339	55.1	\$4,437,930
Induced Impact	\$14,958,794	91.7	\$5,239,618
Total Impact	\$79,167,133	371.4	\$30,477,548

Source: Data provided by Hartz Mountain Industries, Inc.; Analysis by Nelson, Pope & Voorhis, LLC. via IMPLAN software.

3.2.5 Economic Impacts of Annual Operations

A detailed analysis of direct, indirect and induced impacts generated annually during operations is outlined below. It is important to note that each of these impacts is permanent and on-going and they are projected on an annual basis, assuming continued stabilized operations of the

¹⁸ New York State Department of Labor’s Occupational Employment Statistics survey reports a mean wage of \$67,550 among those employed within construction and extraction occupations in the Long Island labor market. Data is based on the Occupational Employment Statistics (OES) survey, which collects information from approximately 51,000 businesses. Estimates are based on responses from six semi-annual panels collected between November 2015 and May 2018. Wages were then updated to the first quarter of 2019 by making cost-of-living adjustments.

¹⁹ According to IMPLAN, a multiplier of 0.684438 represents the total dollar change in labor income of households employed by all industries for each additional dollar of output delivered to final demand through the “Construction of new manufacturing structures” (IMPLAN Sector 51) in Suffolk County, New York.

²⁰ The direct impact of output is equal to the total construction cost of the industrial development over the 14- to 16-month construction period.

²¹ For the purpose of this analysis, it is assumed that the persons employed during the construction of the industrial development will be employed for a duration of 14- to 16-months, from the commencement until the culmination of the construction period.

industrial development at Spagnoli Road. As previously noted, these projections anticipate stabilization of the economy in post-pandemic conditions.

- It is assumed that the industrial development will begin the operational phase of development upon the completion of the 14- to 16-month construction period which will occur early/mid-2022. For the purpose of this analysis, the first year of stabilized operations is assumed to occur in 2023.
- Annual output will be generated in the form of monthly rental income of \$15/SF, as previously seen in **Table 2**.²² This annual output is projected to total over \$6.1 million. Likewise, output will be generated in the form of annual sales revenue among the office, warehouse and distribution center. In total, this direct output is estimated to total over \$20.9 million, annually.²³
- The \$20.9 million in annual operational revenues are projected to generate an indirect impact of over \$7.2 million and an induced impact of over \$7.4 million per year. This additional output is generated through round-by-round sales made at various merchants in other sectors of the regional economy. These include local retailers, service providers, banks, grocers, restaurants, financial institutions, insurance companies, health and legal services providers, and other establishments in the region.
- The sum of the direct, indirect and induced impacts results in a total economic impact on output is over \$35.6 million during annual operations.²⁴
- The industrial development is anticipated to generate 250.0 jobs on site.²⁵ The 250.0 FTE jobs will have an indirect impact of 41.5 FTE and an induced impact of an additional 44.6 FTE in other industry sectors, bringing the total economic impact of employment to 336.0 FTE jobs during annual operations.²⁶
- The 336.0 FTE jobs will generate approximately \$10.0 million in collective labor income²⁷ This labor income will have an indirect impact of nearly \$2.4 million and an induced

²² Assumptions pertaining to monthly rental rates provided by Hartz Mountain Industries, Inc., in October 2019. It is important to note that all costs are estimates based upon market conditions as of the date of preparation of this analysis.

²³ Sales revenue estimate of \$20.9 million was generated by the IMPLAN software, when using the projected employment of 250.0 FTE positions and the projected labor income of \$10 million, as benchmarks in the modeling system.

²⁴ According to IMPLAN, a multiplier of 1.76497 represents the total dollar change in output that occurs in all industries for each additional dollar of output delivered to final demand by “Warehousing and Storage” (IMPLAN Sector 422).

²⁵ Assumptions pertaining to employment during annual operations provided by Hartz Mountain Industries, Inc., in April 2020. A range of 200-300 employees is projected, and for the purpose of this analysis, an average of 250 employees was assumed.

²⁶ According to IMPLAN, a multiplier of 12.61979 represents the total change in the number of jobs that occurs in all industries for each additional one million dollars of output delivered to final demand by “Warehousing and storage” (IMPLAN Sector 422).

²⁷ Assumptions pertaining to labor income during annual operations provided by Hartz Mountain Industries, Inc., in April 2020. A range of \$8-\$12 million is projected, which reflects average annual wages of \$40,000 per employee. For the purpose of this analysis, an average of \$10 million in total labor income was assumed.

impact of over \$2.6 million, bringing the total economic impact of labor income to over \$15.0 million during annual operations.²⁸

A summary of key economic findings projected to occur during annual operations is provided in **Table 6**.

TABLE 6
SUMMARY OF KEY ECONOMIC FINDINGS DURING ANNUAL OPERATIONS

Impact Type	Output (Annual Revenue)	Employment (Number of Annual FTE Jobs)	Labor Income (Total Wages and Benefits)
Direct Impact	\$20,943,202	250.0	\$10,000,000
Indirect Impact	\$7,243,454	41.5	\$2,392,820
Induced Impact	\$7,456,425	44.6	\$2,614,265
Total Impact	\$35,643,080	336.0	\$15,007,085

Source: Data provided by Hartz Mountain Industries, Inc.; Analysis by Nelson, Pope & Voorhis, LLC; via IMPLAN software.

²⁸ According to IMPLAN, a multiplier of 0.71853 represents the total dollar change in labor income of households employed by all industries for each additional dollar of output delivered to final demand by “Warehousing and storage” (IMPLAN Sector 422).

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ATTACHMENT A
Nelson, Pope & Voorhis, LLC
Economic Analysis Qualifications

STATEMENT OF QUALIFICATIONS FISCAL AND ECONOMIC IMPACT ANALYSIS



NELSON POPE VOORHIS

environmental • land use • planning

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June 23, 2020

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INTRODUCTION

Nelson, Pope & Voorhis, LLC (“Nelson Pope Voorhis” or “NPV”) is an environmental planning and consulting firm established in 1997 that serves governmental and private sector clients preparing creative solutions specialized in the area of complex environmental project management and land use planning/analysis. Our offices are strategically located in Melville, Long Island, NY and Suffern, NY in the Hudson River Valley. NPV consists of three divisions, created to better serve clients with high quality, innovative and responsive consulting services in all aspects of environmental planning. The three divisions are:

- **Environmental and Community Planning Division:** prepares comprehensive plans, long-term planning studies, corridor redevelopment studies, brownfield plans and comprehensive and strategic zoning amendments. The group is effective in the use of geographic information systems (GIS) mapping to evaluate issues and present baseline data. Effective community outreach strategies are developed and tailored for each project and the community in which the project is taking place. The group represents a number of planning boards in the region.
- **Phase I/II ESA and Remediation Division:** prepares Phase I/II Environmental Site Assessments with soil and groundwater sampling services, lead based paint, asbestos and radon inspection services, and all forms of environmental sampling. The division evaluates the implications of past and/or present contamination and property uses on future land uses.
- **Environmental Resource and Wetland Division:** conducts ecological assessment and planning, landscape and coastal restoration, wetland delineation and restoration, habitat assessment, conducts stormwater modeling and green infrastructure planning and implementation. This division assists clients through permitting and SEQRA processes.

The primary focus of the firm is to provide quality consulting services that meet the needs and goals of our clients while respecting the environment. We pride ourselves being extremely responsive to each client. Clients rely on NPV’s depth of experience and expertise to provide solutions to each unique project within budget and on schedule. Our clientele, some of whom we have represented for decades, recognize NPV’s capabilities and are secure in knowing that they receive quality professional services from project inception through completion. NPV’s multidisciplinary staff includes AICP-certified planners, economists, ecologists, hydrologists, certified environmental professionals, grants specialists, and GIS specialists.

As a local firm, NPV has significant expertise in performing both Fiscal and Economic Impact Analyses as well as Market Studies. We have served as a primary consultant to many private developers as well as municipalities and have established a solid track-record of completed projects and local government references throughout Long Island, with an emphasis on economic related projects.

NPV has the capabilities to provide the following services:

**PHASE I/II ESA AND
REMEDATION**

ENVIRONMENTAL AUDITS

Phase I ESA & Due Diligence Investigations
Phase II ESA
Groundwater Investigations
Soil Sampling, Boring and Classifications
Soil Gas Surveys
Monitoring Wells & Piezometers
Tank Sampling
Pesticide Sampling & Plans
Soil Management Plans
Remediation
Brownfield/Voluntary Cleanup Plans
RCRA Closures
Superfund Sites
Asbestos Surveys
Influent/Effluent Sampling
Lead Based Paint Surveys
Subsurface Investigations
Ground Penetrating Radar (GPR)
Dewatering Services
Pipe Camera
Magnetometer
Groundwater Monitoring Studies
Flow Studies
Water Supply Studies
Nitrogen Load/TMDL Evaluation

ENVIRONMENTAL ANALYSIS

NYS SEQRA/NYC CEQR Administration
NEPA Analysis/Documentation
EIS/EAF Preparation
GEIS & Regional Impact Analysis
Noise Monitoring & Assessment
Air Impact Analysis
Visual Assessment

**COMMUNITY AND LAND
PLANNING**

ECONOMIC

Fiscal Impact Analysis
Economic Impact Analysis
IMPLAN and RIMS II Economic Impact Modeling
School District/Community Service Impact Analysis
Market Studies
Niche Market Analysis
Demographic Studies
Economic Development Planning
Business Retention & Expansion Strategies
Downtown Revitalization
IDA Financing Assistance

PLANNING

Development of Feasibility Studies
LEED Planning
Public Outreach Meetings
Demographic Analysis
Municipal Review Services
Planning & Zoning Analysis
Build Out Analysis
GIS Analysis
Code Preparation & Review
Downtown Revitalization
Regional Planning & Land Use Plans
Recreation Planning
LWRP & Harbor Management Plans
Grant Writing & Administration
Public Outreach & Community Surveys
Community Visioning
District Mapping
Spatial Analysis of Call Database
Needs Assessment
Demographic Analysis

**ENVIRONMENTAL AND
WETLAND ASSESSMENT**

STORMWATER MANAGEMENT

Stormwater Permitting
Stormwater Pollution Prevention Plans (SWPPP)
Erosion & Sediment Control Plans
NYSDEC "Qualified Inspectors" for Construction Field Monitoring
Stormwater Management Programs
NYSDEC Annual Reports
Construction Stormwater Field Monitoring
Outfall & Infrastructure Inventory
GIS Mapping & Analysis
Stormwater BMP's
Stormwater Management Planning
Low Impact Design

ECOLOGY & WETLANDS

Wetland Delineation and Permits
Permit Plans
Restoration/Mitigation Plans
Ecological Studies and Surveys
Endangered Species Surveys
Pond Management Plans
Invasive Species Control
Water Quality Evaluation
Habitat Management
Watershed Management Plans
Environmental Education /Outreach

**COASTAL & WATERFRONT
MANAGEMENT**

Waterfront Management Plans
Waterfront Certifications
Coastal Erosion Hazard Area
FEMA Compliance
Shoreline Restoration Planning
Ecological Landscape Design

Fiscal and Economic Impact Analyses & Market Studies

NPV performs fiscal impact analyses to identify project benefits and/or impacts in terms of tax revenue projections and demand for community services from various providers – including the ramifications of development on local school districts.

For economic impact analyses NPV utilizes the software IMPLAN (a model that combines a set of extensive databases, economic factors, multipliers, and demographic statistics) to estimate short and long-term employment projections generated by a development. Economic impacts are determined by inputting the anticipated direct spending from construction and operations of each of the development through the IMPLAN model which may be calibrated to reflect local spending patterns. The IMPLAN model estimates the full-time job creation during construction and under operation -- and the direct, indirect and induced economic benefits related to purchase of goods and services. Direct effects are the immediate result of the project implementation. Indirect benefits stem from the purchase by local businesses/industries of goods and services from other local businesses/industries (also known as intermediate expenditures). Induced benefits reflect the spending of wages from residents (accounting for household purchases made by paid employees or from new residents in housing developments).



NPV prepares market studies to evaluate the need for a particular type of development, which include housing needs assessments, evaluation of retail gaps and surpluses, and niche market and branding studies.

KEY PERSONNEL

All NPV professionals are available to assist on an as-needed basis. Kathy Eiseman will serve as the project coordinator, working as the primary contact and assigning projects to the various professionals on the team. Specific individuals expected to provide services and their individual roles for Fiscal and Economic Impact Analyses initiatives are noted as follows:

Personnel	Qualifications, Project Role
Charles J. Voorhis, CEP, AICP Partner	Project Oversight
Kathryn J. Eiseman, AICP Partner	Project Coordination
Nicole Dellavecchia Economic Analyst/Planner	Project Coordination, Preparation of Reports
Adriana Beltrani Environmental Planner	Preparation of Reports

Personnel	Qualifications, Project Role
Beth Cartwright Environmental Engineer/GIS Specialist	Graphics/Map Design

Nelson Pope Voorhis is managed by a select group of partners. Each provides specific expertise in the field of environmental planning, land use planning/analysis, remediation, engineering and land surveying that is unique within the industry. The diverse leadership of NPV couples the experience of our senior partners with the innovation and enthusiasm of our younger staff. Many of the team’s staff have advanced technical degrees and/or technical certifications. Such as LEED Accredited Professional (LEED AP), OSHA 40 Hour HAZWOPER, and American Institute of Certified Planners (AICP), etc.

Charles Voorhis, CEP, AICP is Managing Partner of NPV and has over 40 years of experience in environmental planning on Long Island and in the New York metropolitan area. Mr. Voorhis is a member of the American Institute of Certified Planners (AICP) and is a Certified Environmental Professional (CEP). He has a wealth of experience in managing large scale municipal projects including regional environmental planning, downtown revitalization and action planning, Generic Environmental Impact Statements, stormwater management, wetlands and coastal management, and municipal consulting. Mr. Voorhis and his firm serve as environmental planning consultants to many of New York Towns and Villages and are currently in the process of preparing several long-range planning initiatives for several Towns in Nassau and Suffolk Counties.

Kathryn J. Eiseman, AICP, Partner is a Partner and Division Manager of the Environmental & Community Planning Division. She has over 20 years of planning experience in environmental planning and manages both private and public planning projects. Current projects include the Local Waterfront Revitalization Program for the Town of Islip and Brownfield Opportunity Area (BOA) for the Town of Riverhead BOA. Ms. Eiseman is the planner for the Villages of Southampton and Sag Harbor Planning Boards and directs her staff to perform site plan and subdivision reviews and advises the Board on a regular basis. She is skillful in managing complex projects and working with team members both in house and as subconsultants. Her staff is proficient in the use of GIS and design software for preparation of high-quality graphic products. Ms. Eiseman is experienced in the art of public participation and education and tailors her approach to the unique needs of each project community. She is an enthusiastic and creative planner who endeavors to bring a fresh approach to each project as well as to her position as Treasurer for the Long Island Section of the American Planning Association.

Nicole Dellavecchia is an economic analyst and planner with vast experience overseeing the preparation of market analyses and feasibility studies, niche market studies and branding plans, school district analyses, economic development strategies, as well as fiscal (projecting taxes and the impact to local jurisdictions) and economic (projecting job creating and associated revenues circulating throughout the economy) impact analyses for residential, commercial, office, industrial, recreational, hospitality, tourism and mixed-use developments. She has significant expertise in analyzing demographic data and preparing grant applications. Ms. Dellavecchia has been involved with corridor management plans, local waterfront revitalization plans, brownfield development, zoning plans, mall redevelopment, tourism plans and public participation and community visioning processes. Prior to joining NPV in 2009, Ms. Dellavecchia was involved in numerous planning initiatives- including public-sector and

private development projects throughout New York’s Capital District, Southern Tier and Hudson Valley region, as well as within various municipalities/regions in Pennsylvania and Massachusetts.

Adriana Beltrani, Environmental Planner, has an undergraduate degree in Environmental Policy, Planning and Law from SUNY College of Environmental Science and Forestry and a Master’s Degree in City and Regional Planning from Pratt Institute where she completed her thesis on Community Engagement in Brownfields Planning. Adriana performs on-call planning work for the Village of Airmont and the Town of Mamakating, Planning Boards. She has worked with the Village of Airmont in adopting a Comprehensive Plan and Zoning Update and is now working on zoning for a Village Center development district. Adriana has reviewed a controversial solar project for the Town of Mamakating in an environmentally sensitive area, and subsequently helped to develop a unique solar zoning code that addresses the issues experienced throughout the review process. She has since collaborated on the creation and SEQRA documentation for a solar zoning code in the Town of Blooming Grove as well. Adriana performs solar suitability, land use, zoning and ridgeline analyses using GIS and performs in-depth zoning, and fiscal impact studies. She regularly prepares documentation relating to the SEQRA process for her on-call planning work as well as project specific tasks.

Beth Cartwright is an Environmental Engineer/GIS Specialist with NPV since 2001 and has over 33 years of professional environmental consulting experience. She holds a M.S and B.S. degree in Civil Engineering from the University of Texas and has taken several USGS groundwater modeling courses during her employment there in 1988-1995. Ms. Cartwright specializes in spatial analysis, environmental modeling and mapping using GIS, as well as database analysis and management. Ms. Cartwright utilizes Spatial Analyst to delineate watershed boundaries using USGS Digital Elevation Models which are then refined utilizing local information from fieldwork and site-specific information. Ms. Cartwright provides spatial analysis and mapping expertise and can provide integration with GIS data sources to produce quality graphics, mapping and data synthesis needed for preparation of Phase I/II Site Assessment reports.

Detailed resumes can be provided upon request.

RELEVANT EXPERIENCE

The following list of projects have been selected to demonstrate the team’s qualifications and capabilities.

Canoe Place Inn and Hampton Boathouses (Hampton Bays, NY)

The Canoe Place Inn (CPI) has a longstanding history and serves as an important part of the character of the Hampton Bays community. The rehabilitation the formerly vacant CPI included synergistic uses on the site reminiscent of its history, working together to draw interest for destination weddings, charity events, business conferences and other special events.



In the 2014 preparation of the Environmental Impact Statement, NPV prepared a Fiscal Impact Analysis and Assessment of Needs and Benefits for the Canoe Place Inn and Hampton Boathouses properties. The study examined and quantified the beneficial impacts to the local school district as well as the generation of annual property tax revenues. Moreover, the analysis projected the economic impacts – on output, employment and labor income – during both the construction period and annually, upon a stabilized year of operations of the rehabilitated CPI and residential project components. NPV also prepared a Residential Market Analysis for the Hampton Boathouses property on Shinnecock Canal. The analysis analyzed the relationship between the demand for, and supply of, comparable residential developments and ultimately, quantified the amount and type of housing units that could be supported by the target market – including both those for year-round residents and seasonal residents.

In 2019, NPV prepared a Market Feasibility Analysis for CPI, for submission to the Suffolk County Industrial Development Agency (SCIDA) for tax deferral and other financial assistance. The analysis examined the demand for CPI, the local and regional tourism market and forecasted growth, and determined that CPI will establish a tourism destination that is likely to attract a significant number of visitors from outside the economic development region, and therefore eligible for SCIDA assistance.

Danford's Hotel, Marina & Spa: Economic Planning Analysis (Port Jefferson, NY)

Danford's Hotel, Marina & Spa is an integrated water-dependent facility in Port Jefferson, New York, and is referred to as "the anchor of Port Jefferson." The hotel, marina, spa and restaurant are inter-related uses that support recreational/commercial boating, marine trades, marine material suppliers and related industries. The combined facility is an economic engine for Port Jefferson and the region, with the annual maintenance to, and operations of, the facility creating strong economic activity. An abundant amount of consumer activity ripples through the local community, contributing vastly to the economy of downtown Port Jefferson, and into the Town of Brookhaven, Suffolk County and the region as a whole.



NPV prepared an Economic Planning Analysis that quantified the beneficial economic impacts associated with Danford's Hotel, Marina & Spa. The analysis examined the direct, indirect and induced impacts on output,

employment and labor income, during the annual maintenance and repair construction of the facility, as well as during annual operations of the hotel, marina & spa.

TopGolf Market Feasibility Analysis (Holtsville, New York)

Topgolf is a global sports and entertainment community, which was first launched in the United States in 2005. It has served as the pioneer in the golf entertainment industry ever since. The most recent location in Holtsville, NY includes a 65,000 square foot, state-of-the-art, multi-level golf entertainment complex, and allows for a unique experience that can be enjoyed year-round. No such facility currently exists on Long Island. The synergistic uses provided at the Topgolf Holtsville location will work together to draw interest for local residents, college students and employers, as well as persons originating from outside of the area for patronage, corporate and charity events, business conferences and other special activities. This broad combination of guests will provide economic activity both at the site and into the surrounding community.

In 2016, NPV prepared a Fiscal and Economic Impact Analysis that examined and quantified the beneficial tax revenue benefits as well as economic impacts – on output, employment and labor income – during both the construction period and annually, upon a stabilized year of operations of the proposed Entertainment Recreation Facility. In 2019, NPV prepared a Market Feasibility Analysis for Topgolf, to accompany the Industrial Development Agency (IDA) application to the Town of Brookhaven. The analysis examined the strength of the regional entertainment recreation industry, the demand for this type of use, the lack of supply of comparable facilities in the local and regional economy, and various benefits that would be accrued to the local economy and community at large, through the annual operations of the Topgolf project. The analysis concluded that Topgolf would provide a combined entertainment and recreation facility, that but for the project, would not be reasonably available to the residents of the Town of Brookhaven or Suffolk County, and therefore it was deemed eligible and appropriate for IDA assistance.

Economic Development Chapter of the Comprehensive Plan Update (Town of Southold)

In an effort to achieve the Town’s vision, five goals and numerous objectives were formed to provide direction for future decision-making pertaining to the Town’s economy. Much of the Town’s economic vitality is based on the Town’s unique rural, historic and maritime-based character as well as its natural resources. NP&V prepared the economic chapter of the Comprehensive Plan Update for the Town of Southold to allow for the formation of appropriate recommendations and implementation strategies focused on long-term economic sustainability throughout the Town.

One of the specific tasks involved with the economic chapter of the Town’s Comprehensive Plan is the zoning/build-out analysis. The Town of Southold is facing development pressure and is concerned about the impact that the current zoning may have on the Town’s resources. The Town of Southold prepared a build-out analysis of several zoning districts, and NP&V funneled these findings into a model to assess the regional impact of full build-out and modified development scenarios. Ensuring quality of life, protection of environmental resources, housing needs and maintenance of the tax base were key elements of the model. This project involved

the creation of a model to synthesize multiple evaluation factors to analyze the impact of full build out of the Town of Southold under its current zoning.

Niche Market and Branding Plan & Build-Out/Tax Base Analysis (Bellport, NY)

NPV worked with the Town of Brookhaven on a niche market and branding plan for the Greater Bellport community. The focus of this plan was to form a set of recommendations that outlined the necessary steps that members in the Greater Bellport community can take in order to successfully create a sense of place, community pride and positive perceptions through a more niche-oriented position in the local market. NPV recommended various initiatives to make the Greater Bellport community unique and marketable, creating a place that people want to be, where people are comfortable, and a place that people remember and come back to time and again. The niche market and branding plan strives to promote the community's niche market to new residents, visitors and economic development opportunities alike, offering the Greater Bellport community the opportunity to develop a theme that they want to be known for.



NPV worked with the Town of Brookhaven on a build-out/tax base analysis, to analyze how the local school district could be impacted by growth. NPV created a GIS model to compare tax assessments for various land use scenarios to ensure an adequate tax base to support increased growth in school population without disproportionate increases in residential tax rates. This model was used to test assumptions for future development and to analyze various alternatives in an automated fashion, allowing for easy comparison of scenarios and results. Ultimately, the model will provide a reality check for future planning with respect to provision of quality community services and may provide support for creating additional commercial tax base within the district.