

City of Olean Northwest Quadrant Revitalization Plan (BOA)

Steering Committee Kick-Off Meeting | December 10, 2012

Meeting Attendees

Please see attached sign-in sheet.

Meeting Summary

Welcome and Introductions

Mayor Witte opened the meeting at approximately 6:05 by welcoming attendees and thanking committee members for their interest and participation. Andy Raus (Bergmann Associates) reiterated his appreciation for the committee's involvement and noted the excitement and opportunity surrounding the project.

Prior to handing the presentation over to Kimberly Baptiste (Bergmann Associates) everyone in the room was asked to introduce themselves and describe their affiliation with the project.

Project Overview

Following introductions Kimberly began the presentation by introducing the project team, including additional team members not represented at the meeting. In addition to Bergmann Associates (prime consultant), the project team consists of Camoin Associates (economic and market analysis), Herron Consulting (site selection and business recruitment experts) and Hodgson Russ (legal experts, financing packages, incentives). Other key project partners include the New York State Department of State (project lead, financial and technical assistance); New York State Department of Environmental Conservation (technical brownfield assistance); and the City of Olean Department of Community Development.

Kimberly discussed the role of the project steering committee including attendance at committee meetings, sharing information with the project team, reviewing and providing feedback on project deliverables and assisting with community engagement.

BOA Program Overview

Kimberly provided a brief overview of the BOA Program, noting it is a three-step process and its local community benefits. Kimberly also provided highlights of the Pre-Nomination Study, which was completed in 2007. The main components of the Nomination Study were discussed including Visioning, Existing Conditions, Economic Analysis, Master Plan, Implementation and Project Advancement. Additional work plan tasks to be completed as part of this effort include Phase 1 Environmental Assessments on up to three (3) sites; study

associated with potential co-location of the City and County DPW facilities within the BOA; traffic analysis and build out scenario; rail feasibility analysis; and conceptual alternatives for a regional stormwater system.

Community Engagement

Community engagement activities associated with the planning process were presented and discussed. Community engagement is proposed to include committee meetings; stakeholder and business leader meetings; developer forum; project newsletters and articles; public meetings; and a project website.

Committee members were also asked to identify important stakeholders whom are not currently represented on the committee. This list will serve as the basis for the identification of individuals for stakeholder meetings.

- Railroad representative
- Lending institutions (need to overcome BCP stigma)
- Young people
- Realtors and real estate representatives
- Medical field (recruiters)
- BOCES / other training agencies

Project Schedule

The project schedule was briefly reviewed, noting the entire planning process was anticipated to take approximately 16-months.

Project Boundary

Kimberly presented the proposed project boundary, noting it was expanded from the Pre-Nomination Study phase to incorporate surrounding neighborhoods that have been directly impacted by the brownfield and underutilized sites located in the center of the study area. Kimberly also noted the expansion of the boundary at the southeast corner, reflecting comments generated by the City at the project scoping meeting. The expanded boundary would include the existing Pizza Hut site and all other properties east of North Union and north of Delaware. The City garage property also falls within this area. It was suggested at the committee meeting that the southwestern tip of the boundary also be expanded along Constitution Avenue to the city line. Both adjustments will be made and reflected on future mapping prepared for the project.

Public Visioning Open House

The presentation concluded with a brief summary of the public visioning open house held on November 6, 2012. Feedback expressed at the open house included:

- Need for more jobs
- Capitalize on assets such as I-86
- Vacancies
- Road infrastructure, traffic and safety
- Pedestrian safety concerns
- Environmental concerns
- Drainage and flooding
- Land use conflicts
- Housing conversions
- Use of creek and rivers
- Streetscapes
- New businesses

Visioning Session / Discussion

Andy Raus closed the meeting with a facilitated discussion about opportunities and constraints associated with the study area. He opened the discussion by asking committee members “what excites you about the study area?” The following comments from committee members were noted as opportunities:

- Figuring out what can be done with railroad ROWs
- All services people need are here – small town quality of life
- Form based land use approaches – knit industrial activities into the community
- Residential and industrial uses can exist side by side
- Engage young people in the process
- Make Olean stand out – need to define the niche
- Mountains form a geographic limitation
- Walk/bike to work neighborhoods exist today and should be maintained
- Capitalize on assets we have
- Make City pedestrian friendly
- Enhance recreation opportunities
- Create mixed uses
- Need housing variation / alternative products – townhomes, condos, etc.
- Create places where industries and business want to be and where people / workforce want to live

- Attract young professionals – first need to create a place they want to be
- All places lose young professionals but Olean is not attracting any from other places – need to identify how to do that
- Highlight and market quality of life in upstate New York
- Focus on placemaking
- Capitalize on fact we are on a four season destination
- Streetscape enhancements
- Need to instill sense of pride in how community works
- Bolster public / private partnerships to achieve goals (Andy provided example from City of Rensselaer, DeLaet's Landing)

The following constraints were noted by committee members:

- Seniors are leaving in addition to younger generations
- NYS taxes
- High utility costs
- Gap between jobs / training / work force
- Manufacturing jobs don't seem as attractive to youth today
- Need "beautification" projects
- What NYS has already done to the community and state with its road projects
- Many problems lie at state level and decision making that impacts local communities
- NYSDOT projects changed the character and aesthetics of the community with the goal of getting places faster
- Railroad is hard to work with and doesn't always do what it says it will with regards to maintenance and repairs (painting, etc.)
- Tax base cuts
- Public sector should act first, then private investment will follow
- Changing peoples' perceptions of the role of government versus private sector

The meeting discussion concluded around the notion that the City needs to see some small successes early in order to truly get energized that this will be different than past planning efforts.



City of Olean
Northwest Quadrant Revitalization Plan
through the NYS Brownfield Opportunity Area Program

Preliminary Market Analysis

January 28, 2012 | Committee Meeting #2

Northwest Quadrant BOA Boundary

Proposed: 904 Acres
Parcels: 970 (723 acres)



Project Progress & Status

- **DPW Co-Location Feasibility Study**
- **Existing Conditions**
- **Project Website**
- **Stakeholder Meetings (1/28 – 1/29)**
- **Preliminary Market Analysis**



On-line Presence



<http://boa.cityofolean.org/>

Steering Committee site
access code:

OleanBOA_2013



Camoin

Camoin

Business Recruitment Strategy

I will talk to Joan / Bob about having a slide or two speaking to what they will be working on in coming months

Next Steps

- Complete and submit Existing Conditions Report
- Complete and submit Market Analysis Report
- Committee Meeting #3 – March 2013 (Existing Conditions)
- Committee Meeting #4 – April 2013 (Design Workshop)
- Public Design Workshop – May 2013



City of Olean Northwest Quadrant Revitalization Plan (BOA)

Steering Committee Meeting | May 2, 2013

Issued 5-15-13

Meeting Attendees

Mary George – City of Olean
Keri Kerper – City of Olean
Phil Smith – City of Olean Planning Board
Tom Barnes - City of Olean Planning Board
Lucas Brewer – Western New York & Pennsylvania Railroad
Jim Bellanca – The Rehabilitation Center
Jeff Belt – Sol Epoxy
John Stahley – Dresser Rand
Chad Staniszewski – NYSDEC
Martin Doster – NYSDEC
Chris Bauer NYS DOS
Craig Thrall - J Fitzgerald Group
Michael N'Dolo – Camoin Associates
Christa Franzi – Camoin Associates
Gary Flisnik – Bergmann Associates
Andrew Raus – Bergmann Associates
Dan Sundell – Bergmann Associates

Meeting Summary

Introduction

Andy Raus (Bergmann Associates) opened the meeting with introductions.

Project Status Update

Dan Sundell followed by opening a PowerPoint slideshow highlighting the agenda and progress made on the NW Quadrant BOA Project to-date which included:

- Public Meeting #1 - November 2012
- Committee Meeting #1 - December 2012
- Stakeholder Meetings – January 2013
- Mayor's Forum Presentation – January 2013
- Project Website is Live
- Existing Conditions Analysis has been completed
- Brownfields Analysis has been completed
- Preliminary Market Analysis has been completed



Vision Refinement Exercise

Dan Sundell reminded attendees that both the public and the Steering Committee have gone through a “visioning” exercises to envision the future of Olean and the NW Quadrant. This information will help with the preparation of a vision statement and the development of goals and objectives for the project. In the process, pages of thoughts have been recorded. Dan refined the comments into 20 comments; 10 from the public and 10 from the Steering Committee.

To begin the exercise, Dan asked if attendees had any additions or clarifications to the 20 comments. The following adjustments were suggested:

- Add “Diverse employment opportunities” to the item “Need for more jobs”
- Add “Value added projects that capture dollars for the community”
- Add to the line that says “Capitalize on Access from I-86” add “and access to rail service”
- Add “Foster workforce development from the local higher education institutions”
- Add “Utilize the principles of smart growth”

Attendees were asked to put a checkmark next to their top 5 comments on the worksheet. **Worksheets were collected and the results were:**

- #1 Capitalize on access from I-86 and access to rail service
- #2 Need for more jobs – Diversify employment opportunities
- #3 All services are available here
Attract young professionals
Value added projects that capture dollars for the community
- #4 Environmental concerns need to be addressed
Promote small town quality of life
Focus on place making
Foster workforce development from the local higher education institutions
Utilize the principles of smart growth
- #5 Declining housing quality
Waterways are recreational opportunity
Residential and industrial uses can exist side by side
Make City bike/pedestrian friendly
Need housing variation
Streetscape enhancements

During the discussion on priorities, a question was raised about soil and groundwater contamination and how this will be addressed in the BOA plan. Gary Flisnik stated that the plan will address this – the level of contamination may dictate the end use and/or the need for further study. Andy Raus mentioned that in the Step 3 BOA (the next step) a Generic Environmental Impact Statement (GEIS) will be prepared that will have a plan that focuses on creating shovel-ready sites that are attractive to developers.



Market Analysis Update

Christa Franzi from Camoin Associates presented a brief overview of the Market Analysis at the Mayors Forum in January. This presentation is intended to briefly review the data that was collected and to discuss the finding in more detail. Following is a brief summary of the data and findings along with comments and question from the Steering Committee:

Demographics

- Income levels in the BOA are much lower than other regions
- There is a significant decline in population
- The top industry segments are government, manufacturing, healthcare and social assistance and retail trades

Market Analysis: Industrial Market

- Upon remediation, the BOA will contain some of the most attractive sites for new industrial development in the County due to a variety of reasons such as rail access, I-86 access, infrastructure, acreage, Brownfield Cleanup Program tax credits, and the County IDA's uniform tax exemption policy for Brownfields, workforce. However, current site controls and contamination issues have hindered redevelopment of the BOA.

A question was raised about workforce availability with the declining population. How do we attract, train and retain new workers. Workers in Olean have a strong work ethic and are relatively stable compared with other areas. It will be important to attract workers from different cultures in order to get highly skilled workers. This should be reflected in the vision statement that will be written.

Market Analysis: Natural Gas Industry

So far, the industry trends call for short-term (3-5 year) leases of warehouse space and lay-down space for storage.

Cheap gas is changing industries nationwide making US manufacturing more competitive. Committee members are concerned that this is a short-term market and may not represent the best use of available lands in the BOA and will not be attractive.

The view from I-86 should be considered since it creates a first impression for visitors. A form-based code would be a tool to ensure that new development has a desirable look while also streamlining the review process. Form-based codes are favored by developers.

Don't forget about making the community a desirable place for white collar workers since attracting the professional class results in blue collar work.



Market Analysis: Retail

There is a growing momentum in retail/service sector. People want full service national chain restaurants. There is sales leakage in clothing, electronics and gifts. There are opportunities for “small box” stores (smaller versions of big box stores).

Olean used to be a haven for locally-owned restaurants – this would be good to re-establish. Connecting St. Bonaventure to downtown will help by providing a reliable base of restaurant clientele. Perhaps a gateway that highlights restaurants would help. Opportunities for a “getaway” to a restaurant may still exist. How do we get people off the freeway and into the City of Olean.

Market Analysis: Residential Market

Single family homes dominate the market. 58 percent of homes were built prior to 1939. There is a lack of modern housing options. Camoin feels that units that rent for \$1,000 to \$1,500 per month would do well.

The dominance of single-family homes was questioned since tax roles show multi-family is common. Christa thought that the data was showing the style of building though it may have been converted to multi-family units.

Market Analysis: Office Market

Office demand is currently stagnant though there may be some opportunity for small-scale support space.

Market Analysis: Recommendations

- Keep industrial properties industrial
- Focus retail development in existing retail hubs - think outside the “box”
- Provide modern rentals
- Pro-active zoning
 - Allow alternative housing development
 - Strategic restrictions on uses
- Land assembly
- Quick transfer of properties to private ownership

Mapping

Dan Sundell presented the following maps of the NW Quadrant BOA:

- Land Use
- Zoning
- Land Ownership
- Parks & Open Space – Haggarty Field is missing on the map
- Historic Resources
- Transportation Network – Can we put a trail on the levees? We could use a rail spur in the industrial area. Joe Higgins was a tireless local trail advocate that we can learn from.
- Stormwater System
- Water Resources



Brownfields

Gary Flisnik presented slides that provided an overview of the brownfields in the NW quadrant BOA. He described the number of parcels and their acreage. He also described the process to prepare the list where various databases are searched and the resulting sites are visited from the adjacent right-of-way. There are 40 brownfields in the project area occupying 336 acres (46%) of the 723-acre project area.

There are 132 parcels identified as underutilized that occupy 206 acres. Gary also presented maps of Hazardous Waste Sites; NYSDEC Remediation Site; NYSDEC Spill Sites; and Petroleum Bulk Storage (PBS) and Chemical Bulk Storage (CBS) sites. Gary presented a list of Brownfield Cleanup Program (BCP) sites and their status along with a map of Olean Redevelopment Parcel.

Marty Doster and Chad Staniszewski provide an update of the Olean Redevelopment Parcel stating that an alternative for cleanup is close to being selected. The plan will likely be released this summer.

Marty mentioned that the Benson site needs to be added to the BCP list. There was also a question raised about the status of the Sol Epoxy parcel. Gary will confirm. Marty will review the draft inventory report that was sent to Steering Committee members and will provide comments.

Marty elaborated on the BCP: the lucrative tax credit program will expire in 2015 and may not be reauthorized by the state. The development community should be informed of the program and impending deadline this year since a site cleanup must be completed by December 2015. Marty expressed willingness to come back to meet with developers and community leaders to discuss this.



**City of Olean
Northwest Quadrant Revitalization Plan
Steering Committee Meeting
Olean Municipal Building, Council Chambers
Thursday, June 20, 2013
5:30 p.m.**

Steering Committee Members Attendance:

**Linda Witte, Mayor
Tom Barnes, Southern Tier West, Rail Authority
Chris Bauer, Department of State
Jim Bellanca, ReHabilitation Center
Jeff Belt, SolEpoxy
Don Benson, Benson Construction
Marty Doster, NYS Department of Environmental Conservation
Mary George, City of Olean CD Program Coordinator
Adam Jester, Resident
Elaine Richardson, Vita Nuova, LLC
Mark Sabella, NeighborWorks Home Resources
John Sayegh, JCC
Phil Smith, Olean Planning Board
Chad Staniszewski, NYS Department of Environmental Conservation
Corey Wiktor, Catt. Co. IDA
Tom Windus, DPW Director**

Consultant:

**Bergmann Associates: Andy Raus & Dan Sundell
Hodgson Russ: Daniel Spitzer**

City Staff:

Keri Kerper, Sr. Acct. Clerk Steno.

Mr. Sundell welcomed those in attendance and advised that they will review goals, objectives and begin roundtable discussions. He noted that Ms. George has vacant sites within the BOA that she would like to discuss with the committee. Mr. Raus referred to the draft Vision Statement document (attached) that was provided via email and as a handout to the committee, noting goal areas for the Revitalization Plan. He also referenced the Planning Policy Framework document (attached) and explained that the language is unique to each plan that they have helped communities develop. Mr. Raus indicated that he wants to make sure they are all speaking the same language. He advised that the Vision Statement speaks to the long term to the community and that is what will stand the test of time and it was written from the year 2033 perspective (20 years from now). Mr. Raus noted that they listened to the public, read the past plans and Pre-nomination Study and developed data in order to draft the statement. He advised from the draft Vision Statement they were then able to develop a series of goals and actionable items. Mr. Raus explained the flowchart and example in detail. He advised that they will provide a plan that can be implemented and progress can be tracked over time. Mr. Raus

indicated that they would like to pare down the Vision Statement document. He then read the Vision Statement to those in attendance.

Mr. Belt questioned if they are hitting on the points that are necessary, i.e. what will the BOA sites look like. He suggested throwing out the Vision Statement that was created and noted that it doesn't conform to Smart Growth principles. Mr. Belt presented photos from Frankford, Germany and Ginza, Tokyo. He noted, as shown in the pictures from Germany, that the industrial buildings can have mixed uses such as a hotel, soccer center and restaurants. Mr. Belt suggested that Olean needs to differentiate itself from other communities that have lands available and be more attractive. Mr. Raus explained that the Vision Statement is intended not to be a wordy document; however, they need to have a policy to follow. There was brief discussion regarding adding graphics to the Plan. Mr. Barnes suggested that the first paragraph of the Vision Statement appears to be more background information and should be the prelude to the Vision Statement. Mr. Raus noted that the second paragraph contains what the City has done. It was noted that the statement should focus on the end result. Mr. Sayegh explained that the City will need a combination of a narrative as well graphic images to offer a clear vision that represents the views of the public and the stakeholders. He advised that the vision captures everything they need to see, i.e. housing, industry, employment, recreation and it doesn't need to be 20 years from now. Mr. Sayegh suggested starting with the third line and he then provided in detail the revisions he would like to see. He then gave Mr. Raus his Vision Statement document with the changes he suggested. Mr. Barnes suggested that the explicit mention of Smart Growth principles should be added to the Vision Statement.

Mr. Belt advised that the public don't have any successful role models as south Buffalo's brownfield area isn't similar to Olean's Brownfields. Mr. Raus explained that Bergmann will use a series of photographs to help during the public meeting. Mr. Spitzer questioned if Olean residents were ready to accept European zoning. There was discussion regarding mixed use zoning and some of the difficulties faced with mixed land use and culture issues. Mr. Raus advised that the area is the most prime opportunity for the creation of an employment center in the region. He then questioned how the space integrates with the existing neighborhood and gets infused with the housing stock they prefer. It was suggested to infuse it so that it is connected via vehicular traffic along with the ability to have connectivity for non-motorized ways of transportation. Mr. Belt suggested assembling pictures and a slideshow of different strategies for the public. Mr. Bauer suggested incorporating some of the principles Mr. Belt has shown of Germany, agreeing that connectivity will be key. Ms. George advised that the residents have been dealing with properties in their neighborhoods that no entity wants to foreclose on. She introduced Mr. Jester who is running for Alderman in Ward 7, and explained the residents have expressed concern for the Vanderhorst Plant 1 property. She briefly explained these residents have been negatively impacted by surrounding industries. Mr. Doster suggested leading the public meeting with the inventory instead of the Vision Statement and let the public voice what they want to see. He noted that the residents and businesses are going to have different views, wants and needs. Mr. Doster advised that the vision statement is light on environmental and the public should decide if they want to embrace the creek or if it is an impediment or an attribute. He noted that there isn't a mention of bike trails. Mr. Raus explained that they have met with the public and several local businesses. Ms. George indicated that residents mostly likely won't want a mixed use scenario due to their negative history with industries in the area. Mr. Sabella

suggested educating the people and explain to them that it will take a process as some may never travel to Europe to grasp the concept.

In response to a question, Ms. George advised that the residents want someone to help them with issues specific to their areas. Mr. Belt advised that people want solutions for the immediate future, something that will make a difference in their lifetime. Mr. Raus noted that part of the process involves a significant educational piece. Mr. Belt reiterated that short term successes and milestones are needed. Mr. Jester explained that the residents are looking for a feasible remedy while acknowledging their current plight. He explained that they see the Vanderhorst property and how it would be good to have an impact on the goals that they are talking about in order to build a trust.

Ms. George advised that the County won't foreclose on properties perceived or determined to have contamination issues. There was detailed discussion regarding the New York Land Bank and laws surrounding it. Ms. George questioned what options the City has to transform these contaminated (or perceived to be contaminated) sites. Mr. Spitzer advised that he is not aware of a way that the City can foreclose on property and not incur any environmental liability due to the way the laws are currently written.

In response to a question, Mr. Doster advised that the Vanderhorst properties have been cleaned up; however, there are groundwater issues. Ms. George advised that she spoke with the County Treasurer's office and was advised that the Penn Avenue property has been flagged for environmental concerns. She asked Mr. Doster if DEC would be willing to provide documentation to the County that would clear the site and Mr. Doster agreed that he would provide said documentation. Mr. Doster explained that the property would support commercial development but it is packed tightly in with the residents and suggested getting the neighbors' feedback on their visions and goals. There was discussion regarding the business located nearby and it was determined to be Rontina; a member of the committee suggested contacting that business to see if they would be interested in the parcel. Mr. Raus advised that the area has limited accessibility, recreation and trails and suggested possible use as a park. Ms. George explained that the Homer Hill neighborhood recently lost its park because the IDA sold the property to Mike John; that property is no longer a park and the City is trying to find a place to relocate the neighborhood park. Mr. Raus questioned what the City's overall plan is for parks. Mr. Windus advised that they only have 4 parks employees on staff for maintenance and can't handle anymore. There was brief discussion regarding a business improvement district and the success of this economic development tool in other communities. Mr. Doster explained that if the City was finished with its plan and if the public preferred it to be a public park, then it would be cleaned up to support the plan. He further explained that a Future Land Use Plan dictates the level of clean up.

Mr. Belt explained that they are going to find orphan lands that will not be developed in any way for some time. He then questioned what can be done now. It was suggested to offer the lands to adjacent land owners for whatever use the public wants with the caveat that I may convert back if needed for other uses in the future. Mr. Raus indicated that there is an overabundance of substandard housing in the BOA and that a more diverse housing stock would be beneficial.

Mr. Doster referred to the 16+ acres that ExxonMobil is working on and noted that it is in the heart of the BOA. He advised that they need to develop criteria for land use, including what they want to permit in terms of building structures as well as what the public infrastructure -- sidewalks, roadways, etc. will look like. Ms. George advised that the City had conversations with ExxonMobil most recently and Mr. Windus discussed storm water issues with them. Ms. Richardson explained that with regard to the road infrastructure, the more the City can firm up then they will have a better direction to go with and move forward. Mr. Bellanca suggested designing it well to include streets, sidewalks and bike lanes. Mr. Doster noted that developers are only going to do what is required. Ms. Richardson advised that Vita Nuova is a consultant to ExxonMobil, not a developer, and they are not acquiring the site. She explained that they have worked with the City for a number of years, even before ExxonMobil took ownership of the three parcels, and her firm helps with redevelopment options and environmental issues. Ms. Richardson advised that they are assisting ExxonMobil with the cleanup plans and they don't want remediation issues that would preclude the the preferred land use.

In response to Mr. Sabella's suggestion, Ms. George advised that 4 conceptual plans were prepared for the ExxonMobil parcels during Step I of the BOA Program and they could build off of those. Mr. Belt noted that Buffalo Street is currently heavy with traffic and Ms. George explained that a traffic analysis would be a component of the BOA work as well. Mr. Bauer advised that they need to make the area attractive to new developers and prepare to market it and focus on what the strategic sites will be. He suggested preparing a marketing package and artists renderings of what is desired and why developers should invest here. He further suggested gathering the top 3 or 4 sites in the area and focusing on them. Mr. Doster questioned if they want it to be the next Galleria Mall, an industrial area or hotel/retail. Ms. George explained that they need to allow uses to attract businesses for the short term, without compromising the overall goals for the long term. She clarified that they need to make sure the short term uses permitted in the area don't interfere with the long term. Mr. Bauer suggested a mix of commercial and industrial uses and have the uses feed off of each other using a form-based overlay. It was suggested to have passive traffic devices and no lights.

Mr. Doster explained in detail that the Brownfield Cleanup Program sunsets in 2015 and that remediation needs to be completed. There was discussion regarding implementing items through Code Enforcement and Ms. George explained that they don't have the personnel nor resources dedicated to their work load now.

Ms. Richardson explained that the more this committee, the City and other stakeholders can tell them in terms of desired development, the easier it will be for ExxonMobil and the developer. Per the committee's request, she then gave a detailed update of ExxonMobil's efforts and progress to date. There was brief discussion regarding land use, setbacks, flexibility to market based upon demand and some constraints regarding the property. Mr. Bellanca suggested designing the property so that mixed use is possible. Mr. Belt suggested instituting a form-based code, noting it will help with new build placement. Ms. George indicated that the property development in the BOA needs to be sensitive to the downtown and given its proximity to I-86 they want to bring people into the City. Mr. Raus suggested that with the plethora of housing, some substandard, he doesn't believe that they are going to see more housing areas, suggesting that in-fill housing may be an option.

In response to a question, Mr. Doster explained that controls can be put in very easily if housing is desired and the area can be cleaned up to accommodate townhouses, etc. He explained that the residential townhouse cleanup isn't that much different from commercial. Mr. Raus questioned where the market is for housing and then asked for opinions regarding housing being placed on Wayne & Buffalo Streets. Mr. Sayegh explained that realistically it should be a light industrial and retail area as there isn't a need for housing and there is no projection in population growth. Mayor Witte advised that they still want to be sensitive to the downtown. She suggested light industrial and commercial uses for the area. Mr. Bellanca advised that the market should decide and indicated he believes it will be light industry; however, it should look nice and be pedestrian friendly so that people can walk through it and not have the effect of a heavy industrial zone.

Mr. Sundell briefly touched on their conversations with the community and the market study done by Camoin Associates, a subconsultant to Bergmann Associates. He advised that the market analysis indicated the need for executive type housing and questioned if this area would be the location. Mayor Witte referred to some of the single family homes and businesses that are empty on Wayne Street and suggested demolishing them and replacing them with new housing. Mr. Raus explained that Olean doesn't have the population density to support the downtown with the area's existing disposable income and advised that they need jobs in the BOA to create an employment center and this will help the downtown.

Mr. Windus questioned if Bergmann could concentrate design efforts on the ExxonMobil parcel in order to get the plan approved by the Common Council. Mr. Raus explained that they are planning a public design workshop in September and can provide a Future Land Use Plan for recommendation to the Common Council within the next few weeks. Mr. Sayegh suggested presenting it to ExxonMobil with their consideration.

There was brief discussion concerning the desirability of developing townhouses at the Vanderhorst site. Ms. George reiterated that conceptual plans were created during Step I and they can build off of those. Mr. Sundell advised that they are creating a 3D model of existing conditions and explained that he may need permission from private land owners to go onto properties to take photos for the 3D model.

Ms. George explained that there was a conversation at the last meeting concerning educating or engaging residents and businesses about the benefits of the Brownfield Cleanup Program (BCP). She then inquired if Mr. Doster would be willing to speak with developers/owners in the BOA to more fully explain the BCP benefits in terms of providing incentives for cleanup and redevelopment. Mr. Doster agreed to do so.

Since there were no further questions or comments, the meeting adjourned at approximately 8:15 p.m.

City of Olean Northwest Quadrant Revitalization Plan (BOA)

Steering Committee Meeting | October 24, 2013

Issued 11-20-2013

Meeting Attendees

Linda Witte - Mayor
Mary George – City of Olean
John Stahley – Dresser Rand
Tony Capito - Resident
Adam Jester - Resident
Lucas Brewer – Western New York & Pennsylvania Railroad
Phil Smith – City of Olean Planning Board
Brian Eddy – The Rehabilitation Center
Jeff Belt – Sol Epoxy
Don Benson – Benson Construction
Martin Doster – NYSDEC
Craig Thrall - J Fitzgerald Group
Bob Price – Herron Consulting
Joan Herron – Herron Consulting
Kimberly Baptiste – Bergmann Associates
Dan Sundell – Bergmann Associates

Meeting Summary

Project Status Update

Dan Sundell (Bergmann Associates) opened the meeting with introductions. He followed by summarizing the progress made on the NW Quadrant BOA project to-date. Since the last Steering Committee meeting, the consultant team has:

- Completed the Draft Existing Conditions Report;
- Initiated a 3D model of existing conditions;
- Began preliminary Master Planning land use concepts and;
- Identified Preliminary Strategic Sites
- Prepared a Target Industry Analysis to identify business attraction strategies ; and
- Prepared a Brand and Marketing Strategy.



Strategic Sites

Dan Sundell presented slides describing the criteria for and selection of several “Strategic Sites.” The definition of a Strategic Site is a property that, if redeveloped, has the potential to act as a catalyst to spur further redevelopment and investment

Strategic Site Selection Considerations:

- Medium to large-scale;
- Strategic location in proximity to other commercial or industrial land uses;
- Currently vacant or underutilized;
- Convenient access from major roads;
- Brownfield status;
- Adequate infrastructure;
- Potential to advance the vision for the community; and
- Potential to improve quality of life.

Eleven Preliminary Strategic Sites were selected and presented for discussion. Dan noted the draft nature of this list and the ability to modify based on committee feedback:

1. **2050 Constitution Avenue** – This 8.5-acre site is located between Blue Collar Workwear and Premier Banquet. It is one of three in the immediate area owned by the Olean Urban Renewal Agency. Committee members noted that the site has the potential for freight rail access on the north edge.
2. **1701 Constitution Avenue (north side)** – This 7.2-acre site is the northern portion of a large parcel owned by the Olean Urban Renewal Agency that is bisected by Constitution Avenue. Committee members pointed out that the site recently had a Tractor Supply Company constructed that occupies most of the site. This site will be removed from the list of Strategic Sites.
3. **1701 Constitution Avenue (south side)** – This is the southern half of the large parcel owned by the Olean Urban Renewal Agency. The 11.9-acre site is located behind (south of) Cytec Industries and consists of vacant, open grassland.
4. **Former Agway Nitrogen Complex Site** – This is one of a triad of properties also known as the Exxon properties, this 24.7-acre open, vacant site is located on the west edge of the Dresser Rand plant. There is a possibility for a freight rail spur line onto the parcel.
5. **Former Felmont Oil Site** – Also one of the Exxon properties, this is a vacant 9.2 acre property has many of the same issues and opportunities. Access would need to be provided through an adjacent parcel.
6. **Former Felmont Oil / Former Agway Nitrogen** – The third in the series of Exxon properties, this is the largest at 24-acres and is located between the north side of Dresser Rand and the railroad tracks. This site has the potential for freight access and is the least visible of all the sites.



7. **Franklin Street Vacant Lot** – This is a 9.8-acre site located west of the storage facility. It is very visible from the expressway and is flat open grassland.
8. **251 Homer Street** – This 17-acre parcel is vacant grassland and is visible from the expressway. Approximately one forth is 100-year floodplain.
9. **202 Franklin Street** – This property is located across Franklin Street from Sol Epoxy and is used for parking though the eastern portion is leased to the city as parkland (Hysol Park). The owner is willing to sell or lease but would like the park to remain.
10. **Bluebird Industrial Park Site 1** – This parcel is divided by the expressway into the 18.9-acre northern portion and the 6.4 acre southern portion. The northern portion is the most developable due to its access, visibility and potential for freight rail. The southern portion has limited access.
11. **Bluebird Industrial Park Site 2** – This site is comprised of three separate parcels that total 29 acres. It is open, gently sloping land with a road already provided.
12. **Olean DPW** – This site is included because the city recognizes that the use of the parcel at 701 North Barry Street is incongruous with adjacent land uses. If the DPW is relocated, then this parcel would be available for redevelopment.

Marty Doster mentioned that there is a public comment period expected on the remedial action the three Exxon properties. To receive additional information on the property, the NYSDEC website has a page with an option to sign up for additional information. Marty will forward a link.

Note: Following the meeting, Marty forwarded the following link: <http://www.dec.ny.gov/chemical/61092.html>
The fact sheet was released and is attached to this meeting summary

Lucas Brewer mentioned that one of the advantages that many of the strategic sites have is access to freight rail. Lucas also asked about the deadline for the Brownfields Cleanup Program (BCP) credits. Marty Doster mentioned that the program will sunset in December of 2015 unless the state extends the program.

Target Industry Analysis and Business Recruitment Strategies

Bob Price from Herron Consulting presented a target industry analysis (TIA) for the BOA. Having a TIA allows a community to focus its marketing efforts. Olean BOA recommended target industries include:

- **Advanced Manufacturing** – Industry sectors and example products include resins, compounding of purchased resins, architectural and structural metals, machine shops, fabricated metal products, general purpose machinery
- **Distribution and Warehousing** - Wholesale trade of durable and non-durable goods such as industrial machinery, equipment, and supplies; farm equipment and supplies; groceries; clothing; household goods. Also warehousing and storage including general, refrigerated and specialized warehousing
- **Professional Services/ Entrepreneurial Networked Professionals** – This includes the management of companies and enterprises, consulting services and scientific, technical services: legal, architecture, marketing, and engineering.



- **Urban Agriculture/ Agribusiness** - Specialty and locally produced food products such as jams and preserved products; wineries; organics grown on farms or in urban gardens or converted facilities; coffee roasting; snack foods; spices and flavorings

Bob stated that manufacturing is a vital sector of local and the US economies. Wages in manufacturing are higher than other private economic sectors and the outlook is positive.

Joan Herron discussed business recruitment strategies. Olean must implement realistic recruitment strategies that build on its strengths to attract and retain target industries. Joan pointed out that economic development marketing is personal and that relations must be created and maintained. She recommended that Olean establish an education and workforce committee as well as a new economic development organization focused on City of Olean and BOA that is a 50/50 public/private partnership.

Kimberly asked if the City does a familiarization tour. Mayor Witte mentioned that the city promotes the available sites whenever possible but they do not currently do a formal familiarization tour.

A committee member suggested that perhaps having a warehousing and logistics tradeshow in Olean would highlight the opportunities that are available.

A committee member underscored the importance of relationships mentioning that Geico open offices in Buffalo due to personal relationships with a Buffalo Niagara Enterprise representative. Team members should reach out to learn more about Buffalo Niagara Enterprise strategies and approaches to attracting businesses.

Marketing Strategy

Craig Thrall provided copies of a draft marketing strategy for Olean and discussed the highlights. The strategy will be later applied more specifically to the BOA. He started with a brief analysis of strengths, weaknesses, opportunities and threats (SWOT). He suggested three key markets to focus on:

- Local/Regional Residents & Visitors
- Industry/Business
- Retail/Consumer Business

Overall marketing recommendations include:

- Create an overall campaign theme and brand
- Market industrial/commercial site assets
- Locally, regionally and nationally
- Market to acquire new/expanded business growth
- More year-round events/activities
- Improve self-promoting signage

Craig suggested that the marketing campaign theme be "Open for Business. Open for Life," though other alternatives were provided. He suggested a variety of advertising tactics such as, unique events, signage, web-based advertising, and using testimonials and success stories.



A question was raised about the Olean BOA website and whether it could be used for marketing. Kimberly Baptiste mentioned that the website can evolve into a marketing tool.

A committee member suggested incorporating the city's status as Tree City USA in its marketing.

Next Steps

The next event will be a public design workshop.

Mary asked about the meeting format and Kimberly explained that there are numerous options from an open house format to a more formal presentation. Typically, attendees are introduced to the project and its goals and then broken into groups to address leading questions and mark up site maps.

Bergmann will work with the City of Olean to select a date and meeting format.



City of Olean Northwest Quadrant Revitalization Plan (BOA) Steering Committee Meeting | January 30, 2014

Issued 2-6-14

Meeting Attendees

William Aiello – Mayor, City of Olean
Mary George – City of Olean
Keri Kerper – City of Olean
Mark Sabella – NeighborWorks Home Resources
Adam Jester – Councilmember, City of Olean
Phil Smith – City of Olean Planning Board
Tom Barnes - City of Olean Planning Board
Brian Eddy – The Rehabilitation Center
John Stahley – Dresser Rand
Chad Staniszewski – NYSDEC
Chris Bauer - NYS DOS

Don Benson – Benson Construction
Scott A. Fairbrother - The Krog Corporation
Mike Lesakowski – Benchmark Environmental
Corey Wiktor – Cattaraugus County IDA
John Sayegh – JCC
Anthony Capito - Resident
Lucas Brewer – WNYPRR
Kimberly Baptiste – Bergmann Associates
Andrew Raus – Bergmann Associates
Dan Sundell – Bergmann Associates

Meeting Summary

Project Status Update

Following introductions, Dan Sundell opened a PowerPoint slideshow highlighting progress made on the NW Quadrant BOA Project to-date which included:

- Posted Existing Conditions Report on the website;
- Prepared a 3D model of existing conditions;
- Conducted interviews for input on the Brand and Marketing Strategy

Status of Exxon Properties

Scott A. Fairbrother informed attendees that the Krog Corporation has taken title to the Exxon properties that are adjacent to Dresser Rand. Their immediate focus is remediation of the site which is anticipated to take between 18 months and two years. They do not have any specific plans for redevelopment of the site but are interested in industrial and/or commercial uses. Residential uses were not permitted as a condition of the land sale.

3D Model of Existing Conditions

Bergmann has prepared a 3D model of current conditions in the NW Quadrant BOA. The model is available as a web application, however, due to poor internet availability in the meeting room, the model was not shown. Dan will email a link to committee members along with instructions on how to load and navigate in the model. At a later date, the master plan for the BOA will be imported into the 3D model and users will be able to toggle between existing and proposed conditions.



Community Character Survey

Kimberly Baptiste introduced the community character survey by explaining that it is a tool for the planners to assess committee member's thoughts on desirable and undesirable development for the study area. Attendees were shown 15 slides on each of the four topics below for a total of 60 slides. They were given a score sheet and asked to rate the images on a scale of one to ten with one being not appropriate and ten being very appropriate.

Following are the results showing the top three images for each category:

Commercial Mixed Use

High Average Score 7.31



Average Score 7.31



Average Score 7.31



Low Average Score 4.19



Average Score 5.06



Average Score 5.13



Neighborhoods

High Average Score 7.50



Average Score 7.06



Average Score 7.00



Low Average Score 4.44



Average Score 4.50

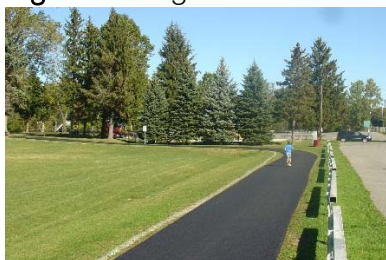


Average Score 5.06



Public Spaces

High Average Score 7.33



Average Score 7.31



Average Score 7.13



Low Average Score 3.50



Average Score 4.38



Average Score 5.50



Industrial Development

High Average Score 7.60



Average Score 7.60



Average Score 7.60



Low Average Score 4.07



Average Score 4.53



Average Score 5.20



Urban Design Considerations

Following the survey, Kimberly Baptiste described a number of considerations that were intended to help committee members with the upcoming land use planning exercise. She presented a slides on the topics of walkable communities, gateways, wayfinding, streetscapes, residential options, mixed use, green infrastructure, and natural habitat and environmental considerations among other topics.

Dan Sundell presented slides showing other community planning projects that featured industrial development from international projects that are intended to be aspirational to well-planned local projects. Dan also provided a brief review of the finding of the Market Study and the Target Industry Analysis.

(Note: the full slideshow will be available on the project website at <http://boa.cityofolean.org/>)

Land Use Break-Out Groups

Attendees were broken into two groups and asked to markup maps of the BOA to address the following three questions:

1. What types of land uses do you think are most appropriate in the BOA. Where are the locations for these land uses?
2. What are the most important short-term projects? Possible projects may be transportation, parks and open space, infrastructure, zoning, etc.
3. What special considerations should be addressed in the master planning process?

After approximately a half hour, the two plan were presented. There were numerous similarities between the two including:

- Exxon properties were shown as industrial with commercial frontage along Buffalo Street
- A mixed-use district along the lots fronting Wayne Street
- Industrial uses along Franklin and Homer Streets

There were also a number of ideas that were unique including:

- A municipal complex near the County building
- A commercial use at the residential area at East Fall Road
- A transload (truck/train) facility at the rail spur north of Constitution Avenue behind Premier Banquet and Tractor Supply Company
- Industrial uses along the rail line between River and North Union Streets
- Lease of rail property for a park at the intersection of West Pine and Spruce Streets
- Look for a location for an ice arena/community center
- Look for a location for a performing arts center. Possibly the Aerie 616 building on Sullivan Street or the building at Sullivan and North Union Streets that currently houses the Olean Business Institute.
- Re-establish the neighborhood commercial district on North Union Street between West Forest Avenue and West Pine Street
- Relocate the DPW facility and allow a commercial use in its place. Suggested locations include a vacant parcel on Homer Street and behind the County building
- Create a trail at the dike along Olean Creek
- Create a stormwater retention/wetland behind the County building

Next Steps

- Public Meeting #2 - Design Workshop (Early March)
- Prepare Draft Master Plan (March - May)
- Financial Analysis of Development Scenarios
- Implementation Strategy (May - July)



City of Olean Northwest Quadrant Revitalization Plan (BOA)

Steering Committee Meeting | June 9, 2014

Meeting Attendees

Please see attached sign-in sheet.

Meeting Summary

Project Status Update

Dan Sundell (Bergmann Associates) opened the meeting with a recap of project progress since the last committee meeting, noting the following highlights:

- Public Meeting was held on March 12, 2014.
- Draft Master Plan and Preliminary Projects have been identified.
- Branding and Marketing Strategy has been updated by JFG, with a focus on the northwest quadrant. Updated materials will be presented at a future meeting.

Draft Master Plan

Kimberly Baptiste (Bergmann Associates) presented the Draft Master Plan, which specifies 17 key implementation projects. Please refer to Powerpoint presentation (attached) and draft master plan. Kimberly reviewed each project in detail. Major discussion points and feedback from committee members is summarized below.

Project #2 – Municipal Stormwater / Education Facility

- The County has an environmental education center in Little Valley
- Need to balance with County site – demonstration and educational facility
- Stormwater overflow on Tractor Supply site could be integrated
- Might be contamination on east side of creek next to Central Tractor
- As shown on master plan, proposed site layout could interfere with potential rail/truck corridor – need to balance usable land

Project #4 & #8 – Crosswalk Treatments

- Look at radius at Buffalo and Constitution, check for ROW availability
- Consider roundabout at Constitution



Project #7 – Industrial / Flex Expansion

- Branch off rail spur at Dresser Rand
- Should largest building actually be larger on plan? As shown, not likely large enough for an industry similar to Dresser Rand in size

Project #9 – Hotel / Expressway

- Make sure traffic layout works, consider other appropriate uses (ie. restaurant)
- Report should highlight that existing residents would be relocated into comparable housing

Project #10 – Possible Rail Crossing

- Look further into opportunities / limitations of private railroad crossing

Project #11 – Park and Residential Lots

- Park currently being considered at site on Buffalo, just north of I-86 exit
- Is the environmental condition of site a limitation for park and housing

Project #12 – City / County DPW

- Reconfigure building to strengthen façade presence along street
- Move office spaces to street frontage

Project #14 – Wayne Street Streetscape

- Would row homes be appropriate on side streets off of Wayne? Consensus was to focus residential redevelopment in the existing residential core adjacent to North Union

Project #16 – Creekside Trail

- Note proposed greenway development extending from Rochester to Olean
- More than a Creekside trail, connects throughout study area into adjacent trail networks

Project #17 – Multi-Family Residential

- Reimagine entire block, including plaza
- Potential location for Arts and Cultural Center – “Waterfront Cultural District”
- Private office space, galleries, various art venues, etc.
- Retain Fire Hall in any redevelopment plans

Next Steps









Kimberly noted the key next steps in the planning process:

- Bergmann to update and refine Master Plan based on committee feedback
- Financial Analysis of Development Scenarios (Camoin)
- Implementation Strategy development
- Steering Committee Meeting #8 – Date TBD (late July/early August)
- Public Meeting #3 / Final Presentation – Date TBD (October 2014)



Nw Quadrant REVITALIZATION PLAN

LEGEND

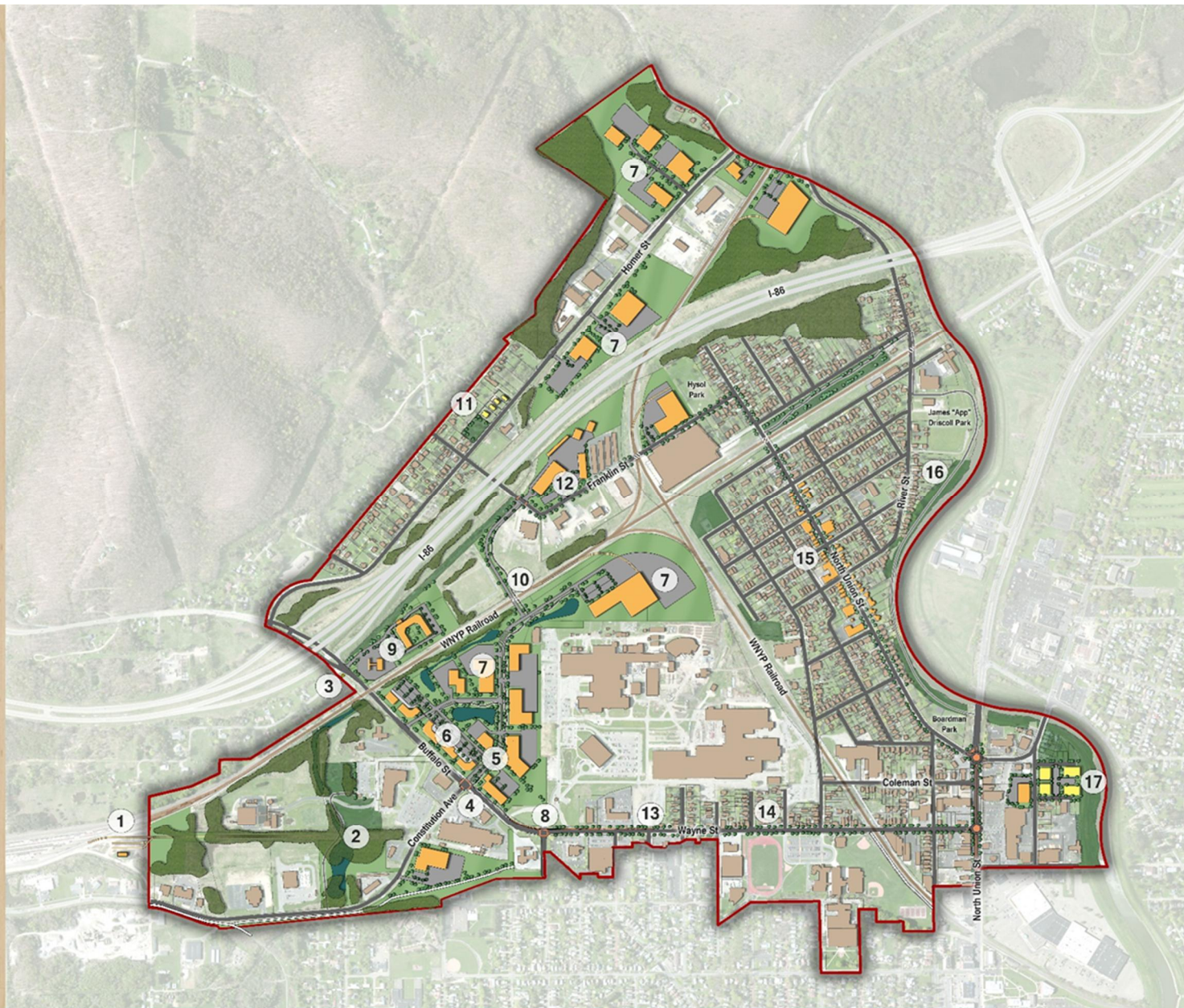
-  BOA Boundary
-  Existing Building
-  Proposed/Upgraded Building
-  Proposed Park/Open Space
-  Existing Trail
-  Proposed Trail
-  Potential Rail Spur
-  Proposed Roundabout

Keynotes

1. Rail Transload Facility
2. Municipal Stormwater/Education Facility
3. Gateway Feature
4. Crosswalk Buffalo St./Constitution Ave.
5. Constitution Ave. Extension
6. Commercial Development
7. Industrial Development
8. Crosswalk Buffalo St./Wayne St.
9. Hotel and Expressway Retail
10. Possible Rail Crossing
11. Park and Residential Lots
12. City/County DPW Facility
13. Sidewalk Extension
14. Wayne Street Streetscape
15. North Union Neighborhood Mixed-Use
16. Creekside Trail
17. Multi-Family Residential



0 250 500 1,000 Feet



City of Olean
William J. Aiello, Mayor
101 East State Street
Olean, NY

Map 19 Master Plan

This map was made possible with the guidance and financial assistance provided by the New York State Department of State Brownfield Opportunity Areas Program

Bergmann
associates
architects // engineers // planners



**City of Olean
Northwest Quadrant Revitalization Plan
Steering Committee Meeting
Olean Municipal Building, Police Training Room
Wednesday, August 20, 2014
5:30 p.m.**

Steering Committee Members Attendance:

William Aiello, Mayor

Jeff Belt, SolEpoxy

Tony Capito

Adam Jester, Alderman

Chad Staniszewski, NYS Department of Environmental Conservation

John Stahley, Dresser Rand

Corey Wiktor, Cattaraugus County IDA

Consultant:

Bergmann Associates: Kimberly Baptiste & Andy Raus

J. Fitzgerald Group: Craig Thrall (Sub-consultant)

City Staff:

Keri Kerper, Sr. Acct. Clerk Steno.

Ms. Baptiste welcomed those in attendance and advised that they would take committee members through the updated marketing plan and extra copies are available. She then referred to the PowerPoint presentation and advised that per committee comment they made improvements to some of the key intersections and added a roundabout to the Buffalo Street and Constitution Avenue intersection and enhanced the crossing graphics on the street and changed buildings 6, 7, and 19. Ms. Baptiste referred to two park options and noted that they are still showing a longer term location along Homer Street and shorter term option near the Interstate. Mr. Raus and Ms. Baptiste went into detail on how they reconfigured the future DPW site to include a stronger street presence along Franklin. Mr. Raus explained that at the last meeting it was mentioned to think more on how to create an aspiration graphic for North Union Street and increase housing opportunities to a new market near the hospital and support retail along North Union Street.

Mr. Raus then referred to the PowerPoint presentation and explained the “Public Square Concept 1”. He explained that it would consist of traditional mixed uses, upper floor housing, townhouses, multifamily building and cultural resources. He noted the trail location and advised that this plan creates an access point to the hospital and clear access to the neighborhood.

Mr. Raus referred to the next slide “Concept 2: Waterfront Cultural District” that has a traditional street grid tying into North Union Street, townhouses with small lots, a multifamily large building, a cultural building with housing, senior housing, office pad and a trail that ties back to the river.

Mr. Raus showed members the 3D model and explained it in great detail and noted what has been done to date and what will occur for the final product.

Mr. Belt advised that he likes both ideas and they need to think of strategies to grow the population of Olean and both concepts have merit and it will take time to digest. He indicated that he also likes the reconfiguration of the DPW facility and he would like to see sidewalks, trees and curbs in that order. Mr. Belt commented that this should be an employment center and people should be able to walk to work. Mr. Raus explained that the DPW facility fits the County's and City's requirements. Mr. Belt suggested connecting the hospital and the medical campus with the downtown and that the mall needs to be viewed as an asset and then figure out why.

Mr. Belt questioned if the BOA will incorporate a generic EIS and Mr. Raus advised that it would in Step III. Mr. Raus and Mr. Belt then discussed the BOA Step III timeline and Mr. Raus advised Mr. Belt to go forward with his project on Franklin Street and not wait on the City for Step III and the EIS.

Mr. Thrall introduced himself to those in attendance and advised that he has been involved in this project for the past 18 months and he came to a meeting last October. He explained that the marketing strategy should focus on marketing the BOA area independently from the City as a whole, with a strategy for the entire City included that could be rolled out at a later time.

Mr. Thrall referred to the PowerPoint presentation and outlined the Objectives and Methodology slides noting that he suggests focusing on strengths and opportunities. He then advised that being mindful is key with regard to the Market Segmentation slide and he explained the percentage breakdown between industrial, retail and local business.

Mr. Thrall referred to the "Industrial/Commercial" slides and suggested being mindful of the target audience and that it should be a phased approach that should start as soon as possible. He advised that acquiring funding sources should be worked on. Mr. Thrall focused on the "Downtown/City" slide and explained that this project should be marketed as one collective zone as well as individual sites. He suggested rolling out the brand development and making people aware of the progress that has occurred. Mr. Thrall noted that events can be relatively inexpensive and sponsorships for said events can be sought to cover costs.

Mr. Thrall read the "Brand/Campaign Theme Development" Industrial/Commercial and Citywide slides. He then referred to the "BOA Marketing Tactics" slide and read the ways to develop the brand and theme (logos and identity package; signage for land available; and market directly to developers and site selectors). He then presented logo/identity options and signage options (see slides).

Mr. Thrall suggested creating a micro website for BOA properties and then showed a mock micro-site that he created (see PowerPoint slides). He then referred to the "Domain Name" slide and advised of the domain names that he researched that are currently available. Mr. Thrall explained the "Web Communications" slide and advised that once a micro-site is set up then e-blasts can be sent, which target developers and investors.

Mr. Thrall then presented the committee with a collateral kit as part of the marketing tactics which includes information for business recruitment and a national outreach package that shows available sites and details regarding zoning, specs, incentives, etc. He suggested keeping the collateral materials uniform along with signage to broaden to the citywide aspect so that stickers may possibly be placed in storefront windows.

Mr. Wiktor briefly explained the Start Up NY Program and advised that he would like to see the BOA Tax Credit Program extended. He noted that industry is still going to be the catalyst for the area.

Mayor Aiello advised that Mr. Thrall did a nice job and Mr. Belt indicated that Mr. Thrall was well prepared and it is great to see a mock up kit in hand. Mr. Belt explained that quality of life is a determining factor as to where you choose to live and noted that industry is back on trend. Mr. Wiktor explained a bus trip that he took on Monday to area businesses in Ellicottville, Allegany and Olean.

Ms. Baptiste advised that they would put the pieces together and provide the City with the next steps that it needs to move forward including short and long term goals and objectives. She explained that Camoin will look at specific projects and the direct financial feasibility and return on investment and debt services ratio. Ms. Baptiste indicated that the next meeting would be in October and they can make a final presentation to the Common Council and the public and hopefully there will be more BOA funding from the State as Step II is wrapping up so that the City can move into Step III. Mayor Aiello advised that the presentation should be made to the Common Council first and then to the public.

Since there were no further questions or comments, the meeting adjourned at approximately 7:05 p.m.

meeting summary

City of Olean Northwest Quadrant Revitalization Plan

Public Visioning Open House November 6, 2012 • 11:00am – 6:30 PM

Meeting Attendees

Project Team

- Mary George, City of Olean
- Kimberly Baptiste, Bergmann Associates
- Andrew Raus, Bergmann Associates
- Matt Chatfield, Bergmann Associates
- Jason Babcock-Stiner, Bergmann Associates

Community Members

- See attached sign in sheet for public attendance

Meeting Overview

Bergmann Associates facilitated a day-long open house session to solicit information, feedback and ideas from the public regarding the Olean Northwest Quadrant Revitalization Plan. The open house was held in conjunction with the National election on November 6 adjacent to the polling location for the Study Area neighborhoods. Before or after voting, the public was provided the opportunity to stop in and learn more about the project, discuss issues with the Project Team, and provide comments and feedback regarding their vision for the neighborhood. The meeting was facilitated by Bergmann Associates staff as a series of information boards, maps and graphics geared towards educating the public and obtaining feedback. Residents were asked to provide feedback directly on maps of the study area, as well as comment sheets focused on obtaining Opportunities and Constraints considered important to the revitalization of the Study Area.

The following represents a listing of comments received from over 50 residents throughout the day, summarized by relevant topic area:

Economic Development

- Area north of I-86 ponds – limited development opportunities
- Develop brownfield area into commercial applications, with I-86 in vicinity makes for easy access
- New office buildings
- Need more job opportunities in this area
- New development should be clean – a lot of illness in neighborhood. In favor of development, just monitor the types
- St. Bonaventure development at 417 to the west (mixed use with recreation)
- Capitalize on the proximity to I-86

meeting summary

- Olean draws from a large area – Northwest PA, Salamanca, and Cuba
- Put a truck stop travel plaza in the southeast corner of the Buffalo Street/railroad intersection
- Need new industry
- What is NYS going to do to be more business friendly
- Need sustainable, good paying jobs
- How do we find a manufacturing job in Olean making \$15-\$20 per hour
- Are there foreclosed or tax delinquent properties in the neighborhood?
- Losing young people – no jobs

Quality of Life (Housing/Recreation)

- Increasing petty crime
- Multiple fire departments due to underpasses
- Property maintenance issues and lack of responsiveness to property owner needs
- Buildings in need of repair – no money free to people that can't afford it
- Too many renters and no upkeep from City (as promised)
- City needs all season recreation opportunities (bowling alleys)
- Neighborhood pride, multi-generational neighborhood
- Preserve residential character of neighborhoods
- Lots of greenspace, park-like feeling, lots of opportunities (need people with vision)
- There are aesthetic/maintenance issues in the neighborhood (e.g., streetlights)
- Any new development should maintain the connectivity, contiguity and integrity of the neighborhood.
- Noise from industrial uses is an issue
- Safe neighborhood
- Safe access to parks
- Vacant housing becoming more common in the study area
- Demo dilapidated properties
- I can afford to invest in my home, but why should I if property values are low and investments not being done by others

Transportation and Infrastructure

- North 9th and 10th Streets near the YMCA need repair (brick roads)
- Increased traffic from I-86 to and including Wayne Street to Union Street (could be a problem)
- Underpass fills with water. Needs to be lowered and widened
- Wayne Street congestion
- New roads
- Put turn light on the turning lane at Wayne and 4th Streets. The light and lanes are already there, just need to activate a turn light (traffic is horribly congested)
- Concerns with the increase in traffic along Buffalo Street and Constitution Ave
- Need gateway signage on Buffalo Street as it exits from I-86
- Unsafe crossing for pedestrians at the Buffalo Street/Constitution Ave intersection and along Wayne Street
- Bad traffic congestion all along Wayne Street makes it difficult to access North Olean

meeting summary

- Put a left turn light at the Wayne Street/North 4th Street intersection
- The North Union Street/North Union Street Extension intersection is unsafe for pedestrians
- There is increased semi-truck traffic on West Pine Street and Vine Street adjacent to the railroad tracks and the roads are not holding up.
- Improve the drainage near I-86 and River Street (near the dike and houses)
- Clean the street sewers
- Traffic an issue on Constitution Ave

Land Use, Zoning and Code Enforcement

- Keep industrial away from residential
- Please include some of the neighborhood south side lower in the study area
- Inconsistent enforcement of city codes (especially in the study area)
- Need more housing and office space
- Rezone to increase industries and business near I-86
- Zoning revisions
- Should the area between the railroad tracks and I-86 (west of Buffalo Road) be added to the Study Area
- Should the southern boundary be expanded to include the residential neighborhoods along Reed Street?
- No more industrial development in the Study Area
- Housing maintenance and upkeep an issue
- Single-family to multi-family conversions happening
- Hotel to apartment conversion going on – is it legal?
- Zoning. Commercial on North Union/Pine
- Group homes wouldn't fit into the character of the neighborhood
- Property assessment – valuation issue

Environmental

- No hazardous waste or dumping should be permitted
- Vanderhorst remnants are very dirty
- Several residents report cancer issues in the study area
- The property near the intersection of North Union Street and Brookview Ave is an old tannery
- There is an old Vanderhorst outfall in Olean Creek near Brookview Ave
- Problems with the filtration plant leaking chemicals
- Water table pollution
- Revitalize the rivers and creeks, make more user friendly

City of Olean Northwest Quadrant Revitalization Plan (BOA) Public #2 - Design Workshop | April 1, 2014

Steering Committee Members in Attendance

William Aiello – Mayor, City of Olean
Mary George – City of Olean Community Development
Tom Windus – City of Olean Public Works
Lucas Brewer – Western New York & Pennsylvania Railroad
John Sayegh – Jamestown Community College
Chad Staniszewski – NYSDEC
Andrew Raus – Bergmann Associates
Kimberly Baptiste – Bergmann Associates
Dan Sundell – Bergmann Associates

(See the attached Sign-In Sheets for additional attendees)

Project Status Update

Dan Sundell (Bergmann Associates) opened the meeting with introductions. He explained that the Northwest Quadrant project is in Step 2 of the three step Brownfield Opportunity Areas (BOA) program that is administered by the New York State Department of State. The BOA program sponsors planning efforts to support brownfield redevelopment and community revitalization efforts.

Dan reviewed progress made on the NW Quadrant BOA to-date, including:

- Public open-house
- Stakeholder meetings
- Preparation of an existing conditions analysis which is summarized in a report
- Preparation of a 3D model of existing conditions
- Completion of a market and economic analysis
- Completion of a target industry analysis
- Draft branding and marketing strategy
- Six steering committee meetings

A project website has been established and can be found at <http://boa.cityofolean.org/>. The website has many of the products listed above along with a 3D model of the study area. The future master plan for the BOA will be added to the 3D model at a later date.



Input To-Date

The first public meeting was an informational open house held in November of 2012. Dan reviewed a summary of feedback received at the meeting, with key highlights including:

- We need jobs – we’re losing our young people
- New development must be “clean”
- Residential property maintenance is an issue
- Too many residential conversions – single to multi-family
- Better crosswalks needed at key intersections
- Traffic congestion at Buffalo Street and Constitution Avenue

Based on input from the steering committee, the public and stakeholders, following are the major assets within the study area that the master plan should build upon:

- Interstate access
- Rail access
- Available workforce
- Available real estate
- Financial incentives

It was also mentioned that new development should conform to the principles of smart growth and incorporate:

- Pedestrian and bicycle access
- Guidelines for site and building design
- Mix of land uses where feasible

A **Market Analysis** for the BOA and Olean was also completed (by Camoin Associates). Dan noted that one of the major conclusions was that there is growing momentum in retail/service sector in Olean for:

- Full service restaurants
- Clothing
- Electronics
- Gift stores

The study also concluded that there is a need for modern, good quality (not luxury) rental units in the \$1,000 to \$1,500 per month range.

A **Target Industry Analysis** was completed (by Herron Consulting) that concluded that there are four major types of industries that should be targeted – through marketing – for locating within the BOA. These were selected based upon the fact that they are growing sectors that pay good wages and are a good fit for Olean. Dan re-capped the findings of this report, noting the target industries are:



- Advanced Manufacturing
- Distribution and Warehousing
- Professional Services/ Entrepreneurial Networked Professionals
- Urban Agriculture/ Agribusiness

Exxon Properties Status

Chad Staniszewsk from NYSDEC informed attendees that the Exxon properties adjacent to Dresser Rand have been sold to the Krog Corporation. Their immediate focus is remediation of the site which is anticipated to take between 18 months and two years. There is over 100,000 feet of piping in the ground which will be removed. There has been extensive soil testing and it is not likely that there will be any surprise “hot spots” of contamination that will cause further delays. Once remediation is complete, the site will be available for development.

Community Character Survey

Kimberly Baptiste from Bergmann Associates facilitated a community character survey. Attendees were shown a series of photos and were asked to rate them from one to ten (with ten being the highest). The survey is intended to help identify desirable and undesirable development characteristics for the study area. The survey results will provide a guide for decision-making related to future development and projects that are consistent with community feedback

Four Categories of photos were shown with 15 images presented in each category:

1. Commercial/Mixed Use
2. Neighborhoods
3. Public Spaces
4. Industrial

Following are the results showing the highest and lowest rated images for each category:

Commercial Mixed Use

High Average Score 8.23



Average Score 8.00



Average Score 7.23



Low Average Score 2.85



Average Score 3.31



Average Score 3.54



Neighborhoods

High Average Score 8.00



Average Score 7.62



Average Score 7.25



Low Average Score 3.54



Average Score 4.54



Average Score 4.69



Public Spaces

High Average Score 8.00



Average Score 7.77



Average Score 7.69



Low Average Score 1.85



Average Score 4.39



Average Score 4.92



Industrial Development

High Average Score 6.31



Average Score 6.23



Average Score 6.08



Low Average Score 2.46



Average Score 2.54



Average Score 2.85



Urban Design Considerations

Following the survey, Kimberly Baptiste described a number of considerations that were intended to help committee members with the upcoming land use planning exercise. She presented slides on the topics of walkable communities, gateways, wayfinding, streetscapes, residential options, mixed use, green infrastructure, and natural habitat and environmental considerations among other topics.

Dan Sundell presented slides showing other community planning projects that featured international industrial development. The projects were intended to be aspirational and included some well-planned local projects.

Land Use Mapping Exercise

This exercise is a tool to gather feedback on preferred future development patterns. Attendees were broken into two groups and given large aerial photos of the study area. Each group was asked to work together to address the following questions by marking on the maps:

1. What types of land uses do you think are most appropriate in the BOA? Where are the best locations for these land uses?
2. What are the most important short-term projects? Possible projects may be transportation, parks and open space, infrastructure, zoning, etc.
3. What special considerations should be addressed in the master planning process?



At the conclusion of the exercise, each group selected a representative to present their findings:

Group A

This group's plan included:

- A trail network along Olean Creek that connected to the Alleghany River Trail via East Connell Street and Franklin Street
- A rail transload facility along the rail right of way south on the Indeck plant
- Sidewalks along Wayne Street along with a crosswalk at Constitution and Buffalo Street
- The Exxon properties were shown as industrial except for commercial uses along Buffalo Street
- A gateway feature at Buffalo Street and the Expressway exit

Group B

The plan marked by Group B included:

- Commercial uses such as Olive Garden, Starbucks or Red Lobster at the residential area at East Fall Road
- A Hotel at the property along Buffalo Street occupied by Verizon
- At the Exxon property nearest Buffalo Street, commercial and retail outlets were shown
- The eastern portion of the Exxon properties was shown as Flex light industrial spaces
- A truck stop was located west of Napoleon Engineering accessible via East Fall Road
- A new DPW facility along Homer Street
- The North Olean Neighborhood should be self-contained with selective demolition and quality infill
- Parking for electric vehicles throughout
- Streetscape improvements along North Union Street
- Wayfinding signage visible from the Expressway

Next Steps

The project team will use the Land Use Exercise maps from this meeting to develop a draft Master Plan for the BOA. A study is underway to identify locations for a future joint City/County Department of Public Works (DPW) facility. There will be another public meeting to present the final draft Master Plan for the BOA.



BOA Site Report

Site Name: Olean Redevelopment Parcel 1

Site Number: 1

Location: Located on northeast side of Buffalo St across from intersection of Buffalo St and Constitution Ave.

Current Use: Vacant

Occupancy: Vacant
Site Address: 1404-06 Buffalo Street
Tax ID: 94.047-2-29
Acres: 24.96

Owner: Olean Gateways, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Buffalo Street
Pedestrian Access: No
Rail Access: No
Water Access: No
Other Access: NA

Adjacent uses:

N: Vacant
S: Cytec
E: Dresser Rand
W: Buffalo Rd/Rehabilitation Center

Land Use History: Formerly operated as Eastman Refinery, Exxon Mobil Works #1, Agway Nitrogen Complex.

Notable Site Features: 60 acre site (Parcels 1,2&3) were sold by ExxonMobil to Olean Gateways, LLC. Cleanup in 2013. Phase I remediation work expected to be completed in March 2015 and plans for redevelopment of these parcels by Krog Corporation include a hotel and retail complex on Parcel 1 scheduled for construction in June of 2016.

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Formerly operated as Eastman Refinery, Exxon Mobil Works #1, Agway Nitrogen Complex.

Current Use: Vacant

Condition: Poor

Building Notes: Small former guard shack.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-601238 - two 300 gallon USTs listed as removed.

Spill Event Site: Yes **Status:** Closed **Comments:** 9509952 closed 12/26/1995; 0506994 closed 02/07/2006.

Hazardous Waste: Yes **Comments:** NYD030207708, NYD055057665 RCRAINFO NYR000169490 "Exxon Mobil Oil Corp" Active Small Quantity Generator.

DEC Remediation Site: Yes **Comments:** BCP Site C905031 "Olean Redevelopment Parcel 1" Formerly home to various oil refineries in the late 19th C. until 1954. Contaminants of concern in site soils are petroleum product, SVOCs, metals and PCBs.

Environmental Due Diligence: Phase I remediation to be completed in March 2015.

Visual Observations from Curbside Site Assessment:

Vacant Brownfield Site with dozens of monitoring wells. Currently a part of the Brownfield Program. Building foundations remain, but the structures have been demolished.

Other Notes:

Located on the Exxon/Mobil Legacy site. Part of Eastman Refinery 1876-1887, Exxon/Mobil Refinery Works #1, and as Agway Nitrogen Complex 1964-1984 as a fertilizer manufacturing plant. Subsurface investigations revealed the presence of PCBs, VOCs, SVOCs in soil and petroleum products, ammonia and nitrate in groundwater. NYSDEC implemented a groundwater treatment program but it was discontinued because of concerns related to nearby Van Der Horst Plant 2.



Guard shack and entrance.



Site signage.

BOA Site Report



View from west.



Gate at Buffalo Rd.

BOA Site Report

Site Name: Olean Redevelopment Parcel 2
Site Number: 2

Location: Located on the northeast side of Buffalo St, south of RR tracks.

Current Use: Small wooden shack visible from road.

Occupancy: Vacant
Site Address: 1470 Buffalo Street
Tax ID: 94.047-2-28.1
Acres: 9.17

Owner: Olean Gateway, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD
Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: No
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Railroad
S: Vacant Brownfield
E: Dresser-Rand
W: Verizon

Land Use History: Former Eastman Refinery, Exxon Mobil Works #1, Agway-Felmont Oil Complex.
Notable Site Features: NA

Building Information

Number of Buildings: 1
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Former Eastman Refinery, Exxon Mobil Works #1 and Agway Nitrogen Complex.
Current Use: Small wooden shack visible from road.
Condition: Poor
Building Notes: Small wooden shack.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-600932 No Information Available, 9-224154 one UST listed as closed-removed (6000 gal) and one AST listed as closed-removed (1000 gal).

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYD030207708, NYD055057665 "CF Industries Inc. Olean Nitrogen Complex"; NEINYLF9193, NYD006983605 "Felmont Oil Corp Chemical Div" RCRAINFO.

DEC Remediation Site: Yes **Comments:** BCP Site C905032 "Olean Redevelopment Parcel 2" Formerly home to various oil refineries in the late 19th C. Contaminants of concern in site soils are petroleum product, SVOCs, metals and PCBs.

Environmental Due Diligence: RI 2008, IRM and BCP 2009, New BCP June 2012.

Visual Observations from Curbside Site Assessment:

No access from public roads. Appears to be large vacant parcel.

Other Notes:

Located on the Exxon/Mobil Legacy site. Part of Eastman Refinery from 1876 until 1887, Exxon/Mobil Refinery Works #1, and as Agway Nitrogen Complex from 1964 until 1984 as a fertilizer manufacturing plant.



View from the west.

BOA Site Report

Site Name: Olean Redevelopment Parcel 3 Site Number: 3

Location: Located south of RR tracks north of Dresser Rand industrial complex.

Current Use: Unknown - no access

Occupancy: Underutilized
Site Address: 1404-06R Buffalo Street
Tax ID: 94.048-1-1.2
Acres: 11.6

Owner: Olean Gateways, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: No

Pedestrian Access: No

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Railroad

S: Dresser-Rand

E: Vacant

W: Vacant

Land Use History: Former Exxon Mobil Works #2 and Agway-Felmont Oil Complex.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #2 and Agway-Felmont Oil Complex.

Current Use: Unknown - no access

Condition: Not Applicable

Building Notes: Unknown

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-601238 - two 300 gallon USTs listed as removed.

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYR000169490 "Exxon Mobil Oil Corp" Active Small Quantity Generator.

DEC Remediation Site: Yes **Comments:** BCP Site C905033 "Olean Redevelopment Parcel 3" Formerly home to various oil refineries in the late 19th C. until 1954. Contaminants of concern in site soils are petroleum product, SVOCs, metals and PCBs.

Environmental Due Diligence: RI 2008, IRM and BCP 2009, New BCP June 2012.

Visual Observations from Curbside Site Assessment:

No access from public roads.

Other Notes:

Located on Exxon/Mobil Legacy site. Part of the former Agway Nitrogen Complex and the former Felmont Oil Site. Remediation is ongoing at the site.



General site view.

BOA Site Report

Site Name: Olean Redevelopment Parcel 3 Site Number: 3

Location: Located south of RR tracks north of Dresser Rand industrial complex.

Current Use: NA

Occupancy: Vacant
Site Address: 1420 Buffalo Street
Tax ID: 94.048-1-1.1
Acres: 12.41

Owner: Olean Gateways, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: No

Pedestrian Access: No

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Railroad

S: Dresser-Rand Residential

E: Residential

W: Vacant

Land Use History: Former Exxon Mobil Works #2 and Agway-Felmont Oil Complex.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #2 and Agway-Felmont Oil Complex.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-601238 - two 300 gallon USTs listed as removed.

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYR000169490 "Exxon Mobil Oil Corp" Active Small Quantity Generator.

DEC Remediation Site: Yes **Comments:** BCP Site C905033 "Olean Redevelopment Parcel 3" Formerly home to various oil refineries in the late 19th C. until 1954. Contaminants of concern in site soils are petroleum product, SVOCs, metals and PCBs.

Environmental Due Diligence: RI 2008, IRM and BCP 2009, New BCP June 2012.

Visual Observations from Curbside Site Assessment:

No access from public roadways. Land appears to be vacant. Photographed from Vine/Oak intersection.

Other Notes:

Located on the Exxon/Mobil Legacy site. Part of the former Agway Nitrogen Complex and the former Felmont Oil Site. As part of the NYSDEC ERP, a Site Investigation in 2007 confirmed petroleum contamination at the site. Groundwater remediation is ongoing.



View from the east.



View from the east.

BOA Site Report

Site Name: Homer Street Redevelopment Site Site Number: 4

Location: Located north of I-86 and south of Homer St, between Johnson St and Oregon Rd.

Current Use: NA

Occupancy: Vacant
Site Address: 251 Homer Street
Tax ID: 94.032-1-2.11
Acres: 16.56

Owner: Homer Street Properties LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Homer Street
Pedestrian Access: No
Rail Access: Yes to the south
Water Access: No
Other Access: NA

Adjacent uses:

N: Homer Street
S: I-86
E: Benson Construction
W: Vacant

Land Use History: Former SOCONY Vacuum Facility.
Notable Site Features: NA

Building Information

Number of Buildings: 0
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 0
Original Use: Former SOCONY Vacuum Facility.
Current Use: NA
Condition: Not Applicable
Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 0907933 closed 5/28/2010.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: Yes **Comments:** C905037: 251 Homer Street Development. Historically part of a petroleum refinery with AST petroleum bulk storage facility and heavy industrial operations. Refinery known as the SOCONY Vacuum facility from the late 1800s until the 1950s.

Environmental Due Diligence: In NYSDEC Brownfield Cleanup Program.

Visual Observations from Curbside Site Assessment:

During site visit, site clearing activities ongoing with excavators and bulldozer on-site. Soil and concrete piles, drums and steel visible as well as monitoring wells.

Other Notes:

Groundwater contamination likely migrating off-site to the southeast. COCs in soils include petroleum products, SVOCs, arsenic and lead; COCs in groundwater include degraded petroleum products, including diesel range organics.



On-site equipment.



One of many soil piles.



Drums on site.



Monitoring well on site.

BOA Site Report

Site Name: 291 Homer Street
Site Number: 5

Location: Located South of Homer St, north of I-86,
northeast of Johnson St

Current Use: Painting and Contractor Corp.

Occupancy: Vacant
Site Address: 291 Homer Street
Tax ID: 94.040-1-31
Acres: 0.92

Owner: M. J. Painting Contractor

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant

S: Interstate

E: Vacant

W: Homer St and Vacant Lot

Land Use History: Unknown.

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Painting and Contractor Corp.

Condition: Excellent

Building Notes: Building occupied by MJ Painting & Contracting Corp.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Open **Comments:** 1102014 closed 09/08/2014.

Hazardous Waste: Yes **Comments:** NYR000146878 "MJ Painting Contractor Corp" Small Quantity Generator.

DEC Remediation Site: Yes **Comments:** BCP: C905042 Active BCP site. Formerly owned by Socony-Vacuum Oil Company 1902-1954. The site was used for petroleum storage/refining, leather tanneries, light/heavy manufacturing, chrome plating, fertilizer manufacturing, railroad facilities.

Environmental Due Diligence: In NYSDEC Brownfield Cleanup Program.

Visual Observations from Curbside Site Assessment:

Newer building.

Other Notes:

291 Homer St is occupied by MJ Painting Contractor Corp, a commercial/industrial painting contractor. A metal building exists on the parcel: offices and a warehouse. Constructed on concrete piers with slab-on-grade foundations. Parcel 2 is vacant land. Formerly owned by Socony-Vacuum Oil Company, Inc. 1902-1954. The Site was used for industrial operations including, but not limited to, petroleum storage and refining, leather tanneries, light/heavy manufacturing and railroad facilities.



View from the north.



View from the north.

BOA Site Report



BOA Site Report

Site Name: Oregon Road Property Site Number: 6

Location: Located east of the intersection of Homer St and Oregon Rd.

Current Use: NA

Occupancy: Vacant
Site Address: Oregon Road
Tax ID: 94.001-2-13.2
Acres: 24.67

Owner: Benson Construction & Dev.

Brownfield: Yes
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Oregon Road and Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant

S: Homer Street, Vacant, Casella

E: Residential, Vacant, Oregon Road

W: Vacant

Land Use History: Former Exxon Mobil Works #3.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #3.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 8701580 closed 12/16/1987.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Undeveloped with the exception of roadway into property from the south. Fire plugs and water.

Other Notes:

Located on the Exxon/Mobil Legacy Site. Prior use as the United Lumber Company from 1888, then as a Refinery.



View streetside Oregon.



Access roadway.



Water onsite.



General site view.

BOA Site Report

Site Name: Former Van Der Horst Corp Plant 1 Site Number: 7

Location: Located at the intersection of Vine St and Penn Ave.

Current Use: NA

Occupancy: Vacant
Site Address: 314 Penn Avenue
Tax ID: 94.048-1-60
Acres: 1.07

Owner: Van Der Horst Properties LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Vine Street and Penn Avenue

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Residential

S: Commercial

E: Residential

W: Industrial

Land Use History: Former Van Der Horst Corporation Plant 1 - Van Atta Plant.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Van Der Horst Plant 1: Van Atta Plant - produced hydraulic presses.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-224162 one UST listed as closed-removed (10000 gal); one AST listed as closed-removed (500 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 9975354 closed 8/13/1999.

Hazardous Waste: Yes **Comments:** NYD980780928 Superfund; NYD071468292; NYP000791889 RCRAINFO; DEC 905008 "Van Der Horst Corp" former location of chromium plating facility. Spent chromic acid solutions & acid contaminated waste water disposed at site.

DEC Remediation Site: Yes **Comments:** State Superfund Site 905008 "Van Der Horst Corp" former location of chromium plating facility. Spent chromic acid solutions & acid contaminated wastewater disposed at site.

Environmental Due Diligence: RAs: 1992, 1997, 1991, 1995, 1999 (for OUs 1-3).

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

Former chromium plating facility from 1940s until 1987, also part of Van Atta plant which produced hydraulic presses. Phase I and II confirmed contamination in soil, groundwater, storm sewers. Remedial activity included removal of contaminated soils. Requires long term O&M, listed on NYSDEC as Inactive Hazardous Waste Site, on CERCLIS as Class 4 Inactive Hazardous Waste Site.



Site wells from Penn.



Site wells.

BOA Site Report



Site view from Penn.



Site view from Vine.

BOA Site Report

Site Name: Former Van Der Horst Corp Plant 2A Site Number: 8

Location: Located south of Johnson St, north of RR tracks.

Current Use: Napoleon Engineering Services.

Occupancy: Occupied
Site Address: 1601 Johnson Street
Tax ID: 94.039-4-45.2
Acres: 8.15

Owner: Markjon Properties, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Johnson and Franklin Streets

Pedestrian Access: No

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Johnson St

S: Railroad

E: Valley Tire Co

W: Vacant

Land Use History: Tanneries in the late 1800s, Wilson Roller Blind Mfg Co, Acme Glass Works, Van Der Horst Plant 2.

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Tanneries in the late 1800s, Wilson Roller Blind Mfg Co, Acme Glass Works, Van Der Horst Plant 2.

Current Use: Napoleon Engineering Services.

Condition: Excellent

Building Notes: New steel building - engineering office.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NYD980780928; NYP000791871.

DEC Remediation Site: No **Comments:** State Superfund Site Site 905022 Van Der Horst Plant 2: Over 3 acres of waste material identified by NYSDEC in 1988. Contaminated with chromium and barium. Improperly stored hazardous waste material was located in the plant building.

Environmental Due Diligence: RAs: 1996, 1991, 1995 for property adjacent-south.

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

Location of former tanneries in the late 1800s, Wilson Roller Blind Manufacturing Company from 1891 to 1902, Acme Glass Works from 1895 to 1923, Van Der Horst Corporation chromium plating facility from the 1940s until 1987. NYSDEC confirmed waste materials contaminated with chromium and barium on landfill area on adjoining property to the south. Remediation was completed in 1996 and contaminated soils have been encapsulated.



View from Franklin.



Site access.



North of building.



Steel structure.

BOA Site Report

Site Name: Former Van Der Horst Corp Plant 2B
Site Number: 9

Location: Located at the eastern terminus of W Connell St, north of RR tracks.

Current Use: NA

Occupancy: Vacant
Site Address: 1601-R Johnson Street
Tax ID: 94.039-4-45.1
Acres: 7.09

Owner: Van Der Horst Properties, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Connell Street
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Wooded/Interstate
S: Railroad
E: Napoleon Engineering
W: Residential

Land Use History: Tanneries in the late 1800s, Wilson Roller Blind Mfg Co, Acme Glass Works, Van Der Horst Plant 2.
Notable Site Features: NA

Building Information

Number of Buildings: 0
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 0

Original Use: Tanneries in the late 1800s, Wilson Roller Blind Mfg Co, Acme Glass Works, Van Der Horst Plant 2.
Current Use: NA
Condition: Not Applicable
Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYD980780928; NYP000791871.

DEC Remediation Site: Yes **Comments:** State Superfund Site 905022 Van Der Horst Plant 2: Over 3 acres of waste material identified by NYSDEC in 1988. Contaminated with chromium and barium. Improperly stored hazardous waste material was located in the plant building.

Environmental Due Diligence: RAs: 1996, 1991, 1995 (for OUs 1, 1A, 2).

Visual Observations from Curbside Site Assessment:

Monitoring wells across site. It appears as though a cap was installed on the site with stormwater protection surrounding it. Very limited site access from Connell St.

Other Notes:

Location of former tanneries in the late 1800s, Wilson Roller Blind Manufacturing Company from 1891 to 1902, Acme Glass Works from 1895 to 1923, Van Der Horst Corporation chromium plating facility from the 1940s until 1987. NYSDEC confirmed waste materials contaminated with chromium and barium. Remediation was completed in 1996 and contaminated soils have been encapsulated.



View of capped surface.



Monitoring wells.



View of capped surface.



View of capped surface.

BOA Site Report



BOA Site Report

Site Name: Franklin Street Vacant Lot Site Number: 10

Location: Located south of I-86, north of the intersection of Johnson St and Franklin St.

Current Use: NA

Occupancy: Vacant
Site Address: 350 Franklin Street
Tax ID: 94.040-1-2.1
Acres: 9.8

Owner: Blue Bird Industrial Park

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Johnson and Franklin Streets

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Interstate

S: Valley Tire Co

E: Self storage

W: Johnson St and vacant

Land Use History: Former Exxon Mobil Works #3. Historical SOCONY fuel usage.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #3. Former SOCONY Fuel usage.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYD986878775 "New York State DEC" RCRAINFO; NYD987025988 "Rupp Rental & Sales Corp" RCRAINFO Active Conditionally Exempt Small Quantity Generator.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: In process of cleanup by Exxon.

Visual Observations from Curbside Site Assessment:

Site is vacant with ongoing site investigation - drilling crew and sampling crew on-site. Drums and monitoring wells visible.

Other Notes:

Located on the Exxon/Mobil Legacy site. adjacent to the former Van Der Horst Plant 2 Site. Former SOCONY refinery use, currently being cleaned up by Exxon.



Drilling crew on site.



View from Franklin.



Drums on site.



Drilling crew on-site.

BOA Site Report

Site Name: Bluebird Industrial Park 1

Site Number: 11

Location: Located north of I-86, west of River St and Oregon Rd, southeast of RR tracks.

Current Use: Warehouse, dumpster and roll off storage visible.

Occupancy: Vacant
Site Address: 1641 River Street
Tax ID: 94.032-1-5
Acres: 25.34

Owner: Blue Bird Industrial Park

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Walnut, Martin, Homer Aly & Gate on River Street.

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Interstate 86 Highway

S: Residential

E: Residential

W: Residential

Land Use History: Former Exxon Mobil Works #3.

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Former Exxon Mobil Works #3.

Current Use: Warehouse, dumpster and roll off storage visible.

Condition: Fair

Building Notes: Small warehouse.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** Aboveground storage tank visible on-site.

Spill Event Site: Yes **Status:** Closed **Comments:** 9201686 closed 5/11/1992.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Vacant Land some Misc. Trash boarding the property. Gate Access from Rivers St. North of 86 - near warehouse, 275 gallon AST waste oil. 2 55-gallon drums. Storage of Rolloffs and Dumpsters, Misc Equip and materials storage, Cassella Trash truck.

Other Notes:

Located on the Exxon/Mobil Legacy site. During Pre-Nomination, the site included old machinery including forklifts, semi trucks, trailers, rail cars, scrap metal, lumber, and dumpsters. Contaminated groundwater may be migrating on-site from nearby Homer Street Redevelopment Site.



General site view.



View from Gate at River St.



Tank and Drums.



Building and storage.

BOA Site Report

Site Name: 1621 River Street
Site Number: 12

Location: Located north of I-86, west of River St.

Current Use: NA

Occupancy: Vacant
Site Address: 1621 River Street
Tax ID: 94.033-1-1
Acres: 0.77

Owner: Jennings, Cheryl A.

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: River Street

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Bluebird Industrial Park 1

S: I86

E: River Street

W: Bluebird Industrial Park 1

Land Use History: Former Exxon Mobil Works #3.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #3.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Large highway sign located on site.

Other Notes:

Located on the Exxon/Mobil Legacy site.



Site to Southwest.



Site to west.



Site to northwest.



Site to North.

BOA Site Report

Site Name: Bluebird Industrial Park 2 Site Number: 13

Location: Located north of Homer St, southwest of Oregon Rd.

Current Use: NA

Occupancy: Vacant
Site Address: Homer Street
Tax ID: 94.001-2-13.8
Acres: 3.86

Owner: Blue Bird Industrial Park

Brownfield: Yes
Zoning: A-R
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant.

S: Homer Street, Cassella, Benson Construction and Development.

E: Vacant with new Roadway access.

W: Ka-Bar Knives.

Land Use History: Former Exxon Mobil Works #3.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Former Exxon Mobil Works #3.

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Majority is Vacant cut land with driveway access from Ka-Bar Knife.

Other Notes:

Located on the Exxon/Mobil Legacy site.



View from Homer St.



Access road.



View along Homer St.

BOA Site Report

Site Name: 6 Leo Moss Drive

Site Number: 14

Location: Located on the western side of Buffalo St, north of Leo Moss Dr.

Current Use: Church.

Occupancy: Occupied
Site Address: 6 Leo Moss Drive
Tax ID: 94.047-1-27.1
Acres: 7.6

Owner: Bethany Evangelical Lutheran

Brownfield: Yes
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Leo Moss Drive
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Railroad
S: Cat County Offices
E: Buffalo Rd
W: Vacant/Railroad

Land Use History: Buswell Brown & Co Tannery. May have emptied refuse into on-site creek. Tannery burned down 1904.

Notable Site Features: NA

Building Information

Number of Buildings: 3
Gross Floor Area (sq. ft.): 0
Year Built: 0

Stories: 1

Original Use: Buswell Brown & Co Tannery. May have emptied refuse into on-site creek. Tannery burned down 1904.

Current Use: Church.

Condition: Good

Building Notes: Brick and Block structures with siding. One pavilion on-site.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Site used as a church and food pantry.

Other Notes:

Part of the former Buswell Brown and Company Tannery in the 1890s. It is believed that the tannery emptied refuse into the Two Mile Creek, which runs through the property. The tanning process used many chemicals including chromium, arsenic and heavy detergents, and produced residual products including tanning bark, animal flesh, fat, and hair, and chemical solutions and sludges. The tannery was consumed by fire in 1904 and was never rebuilt.



Church facility buildings.



View from the southeast.



Church building.



View from south.

BOA Site Report

Site Name: 1405-07 Buffalo Street
Site Number: 15

Location: Located south of the intersection of Buffalo St and Constitution Ave.

Current Use: Cytec Chemical and Material Manufacturing.

Occupancy: Occupied
Site Address: 1405-07 Buffalo Street
Tax ID: 94.047-1-48
Acres: 6.19

Owner: Cytec Olean Inc.

Brownfield: Yes
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Constitution Avenue.

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Radiation Medicine Center.

S: Vacant

E: Citgo Gas Station

W: Constitution/Parking/Energy Plant entrance.

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 2

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 2

Original Use: Unknown

Current Use: Cytec Chemical and Material Manufacturing.

Condition: Good

Building Notes: Office and manufacturing/shipping and receiving.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-000136 No Information Available; 9-042684 one UST listed as closed-removed (10000 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 9708644 closed 1/23/1998; 9108208 closed 12/30/1991; 9315312 closed 3/26/1994; 9407428 closed 9/2/1994; 9611515 closed 9/8/1998; 9714372 closed 5/18/1998; 9005295 closed 9/14/1990.

Hazardous Waste: Yes **Comments:** NYD096297544.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Large active manufacturing facility.

Other Notes:

NA



View from the north.



View from the east.



Rear of plant.

BOA Site Report

Site Name: 1405-07 Buffalo Street
Site Number: 15

Location: Located on either side of Constitution Ave at Ft and Anna C Maney Dr.

Current Use: NA

Occupancy: Vacant
Site Address: Constitution Avenue
Tax ID: 94.055-1-37.2
Acres: 18.6

Owner: Olean Urban Renewal Agency.

Brownfield: Yes
Zoning: I-3
Use Potential: TBD



Property Information

Infrastructure: TBD
Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Constitution Avenue.
Pedestrian Access: No
Rail Access: No
Water Access: No
Other Access: NA

Adjacent uses:

N: Cytec/Indeck/Building Supply/Credit Union.
S: Residential.
E: Citgo/Residential.
W: Vacant.

Land Use History: Historically owned by the Pennsylvania RR, used as a RR yard until the 1950s.
Notable Site Features: NA

Building Information

Number of Buildings: 0
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 0
Original Use: NA
Current Use: NA
Condition: Not Applicable
Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Mostly vacant with roadway and walking path passing through. West of Constitution had gas line running through property.

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to Cytec Industries. Formerly a rail yard until the 1950s. Phase I ESA in progress for land adjacent to Cytec.



Vacant land



Walking path/roadway



Entrance to walking path



Gas line cutting through

BOA Site Report

Site Name: 202 Franklin Street

Site Number: 16

Location: Located north of Franklin Street, south of I-86.

Current Use: NA

Occupancy: TBD
Site Address: 202 Franklin Street
Tax ID: 94.040-1-3
Acres: 8.42

Owner: Silence Dogood, LLC

Brownfield: No
Zoning: TBD
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: NA

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Franklin Street

Pedestrian Access: Franklin Street

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: I-86, Homer Redevelopment Site

S: Franklin Street, Sol Epoxy Inc and former Henkel Corp.

E: Residential

W: RR tracks, self storage, Franklin Street vacant lot

Land Use History: TBD

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built:

Stories: 0

Original Use: NA

Current Use: NA

Condition: TBD

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:**

Spill Event Site: No **Status:** Not Applicable **Comments:**

Hazardous Waste: No **Comments:**

DEC Remediation Site: Yes **Comments:** BCP: C905043. 202 Franklin Street. Historic manufacturing of wood alcohol and waste paper pulp occurred on site from 1909-1956. The operation of a powerplant and boiler operations also occurred on-site.

Environmental Due Diligence: In NYSDEC Brownfield Cleanup Program.

Visual Observations from Curbside Site Assessment:

Not visited.

Other Notes:

NA

BOA Site Report

Site Name: Dresser Rand Company 2
Site Number: 17

Location: Located at the northern terminus of N Fifth St.

Current Use: Dresser-Rand

Occupancy: Occupied
Site Address: Fifth Street N., Paul Clark Drive
Tax ID: 94.048-1-2.1
Acres: 87.48

Owner: Dresser-Rand Company

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Buffalo and Wayne Streets

Pedestrian Access: No

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant

S: Residential and Commercial

E: Railroad/Residential

W: Vacant Brownfield Site

Land Use History: Dresser-Rand Company has occupied the site for a number of years.

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Unknown

Current Use: Dresser-Rand

Condition: Good

Building Notes: Numerous manufacturing and office buildings.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-386634 17 ASTs closed; 10 USTs closed; 3 ASTs Converted to Non-Regulated Use; 9 ASTs In Service; 9-000259 No Info Available, 9-000308 No Info Available, 9-000289 No Info Available.

Spill Event Site: Yes **Status:** Open **Comments:** 16 closed spills including: 0408322, 9212970, 9311272, 9410189, 8701613, 9110616, 9203255, 9203307, 9208507, 9208913, 9109193, 9975579, 0811369, 9212687, 9102979, 9515882.

Hazardous Waste: Yes **Comments:** 3600900014, NYD002123644, 1000005055, 1400014684, NEI35396, NY0094781, 14760DRSSRPOBOX "Dresser Rand" AIRS/AFS, ICIS, NPDES PERMIT, TRI REPORTING FORM, AIR VOLUNTARY SUBMISSION, RCRAINFO, NOTIFICATION (RCRA).

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Dresser-Rand facility, active manufacturer. Limited access.

Other Notes:

NA



View of facility.



View of facility.



View of facility.



View of facility.

BOA Site Report

Site Name: Economic Development Center
Site Number: 18

Location: Located north of Wayne St, opposite 10th St.

Current Use: The Connection

Occupancy: Occupied
Site Address: 1010 Wayne Street
Tax ID: 94.048-1-2.2
Acres: 2.48

Owner: Park Centre Development Inc.

Brownfield: No
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Wayne Street
Pedestrian Access: Yes
Rail Access: No
Water Access: No
Other Access: NA

Adjacent uses:

N: Dresser-Rand
S: YMCA
E: Dresser-Rand Property
W: YMCA Child Care Center

Land Use History: Advanced Monolythic Ceramics.

Notable Site Features: NA

Building Information

Number of Buildings: 1
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Unknown
Current Use: The Connection
Condition: Good
Building Notes: Single story block and steel structure.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYR000028449 "Advanced Monolythic Ceramics."

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to Dresser Rand Facility.



View from southeast.



View from Southeast.



View from Wayne.



View from Wayne.

BOA Site Report

Site Name: Former Gasoline Station Uni-Mart Site Number: 19

Location: Located at the southeast corner of Wayne St and 9th St.

Current Use: NA

Occupancy: Underutilized
Site Address: 921 Wayne Street
Tax ID: 94.056-5-45.2
Acres: 0.34

Owner: Horsley, Ross A.

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: 9th and Wayne Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Residential

S: Olean Open MRI

E: Mash Urgent Care

W: Residential

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: NA

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-488844 three USTs listed as closed-removed (10000 gal each).

Spill Event Site: Yes **Status:** Closed **Comments:** 9508411 closed 10/30/1995.

Hazardous Waste: Yes **Comments:** NYD986944544 "Uni-Marts Inc" RCRAINFO.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Parking lot, appears to be newer. Former gas station has been demolished.

Other Notes:

Parking lot for Mash Urgent Care facility. Due to redevelopment, priority is low.



View from 9th St.



View from 8th St.

BOA Site Report

Site Name: Sol Epoxy Inc and Former Henkel Corp
Site Number: 20

Location: Located on the south side of Franklin St, east of RR tracks, at the end of W. Connell St.

Current Use: Sol Epoxy

Occupancy: Occupied
Site Address: 211 Franklin Street
Tax ID: 94.040-1-21
Acres: 5.48

Owner: Goodban Belt, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Franklin and Connell Streets

Pedestrian Access: Yes

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Parking and Vacant

S: Railroad

E: Residential

W: Railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Sol Epoxy

Condition: Good

Building Notes: Block and concrete structure.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-014605 one UST listed as closed prior to 03/91 (10000 gal); one UST listed as temporarily out of service (1000 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 0375048 closed 4/25/2003; 8911024 closed 4/20/1990; 0175283 closed 8/27/2001; 9007485 closed 10/9/1990; 9701233 closed 4/28/1997.

Hazardous Waste: Yes **Comments:** 3600900031, NYD042569079, NYR00F126 "Henkel Corporation", "Solepoxy" TRIS, Air, NEI, NCDB, TSCA.

DEC Remediation Site: Yes **Comments:** 905038 Site characterization completed in 2011. No Further Action status in 2011.

Environmental Due Diligence: Site Characterization & No Further Action in 2011.

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

NA



Building East side.



Loading dock southeast corner.



North side of building.



West side of building.

BOA Site Report

Site Name: Country Fair #75
Site Number: 21

Location: Located at the southwest corner of Buffalo Rd and N 12th St.

Current Use: Gas station

Occupancy: Occupied
Site Address: 421 Twelfth Street N.
Tax ID: 94.056-2-58
Acres: 1.75

Owner: Prime Realty II Inc

Brownfield: Yes
Zoning: I-3
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Buffalo and 12th Streets

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant

S: Residential

E: Dresser Rand

W: Vacant

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Gas station

Condition: Good

Building Notes: Single story gas station.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600367 four USTs listed as In Service (15000 gal, 10000 gal, 8000 gal, 6000 gal).

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Gas station in good condition.

Other Notes:

NA



View of pump islands.



View from the east.

BOA Site Report

Site Name: 351 Franklin Street

Site Number: 22

Location: Located south of Franklin St north of RR tracks.

Current Use: Valley Tire Co.

Occupancy: Occupied
Site Address: 351 Franklin Street
Tax ID: 94.040-1-29.1
Acres: 6.22

Owner: Blue Bird Industrial Park

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Franklin Street
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Vacant
S: Railroad
E: Scott Rotary Seals
W: Vacant

Land Use History: Historical SOCONY Fuel usage.

Notable Site Features: NA

Building Information

Number of Buildings: 2
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Historical SOCONY Fuel usage.
Current Use: Valley Tire Co.
Condition: Excellent
Building Notes: Two steel buildings with large overhead doors.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-601070 one 275-gallon in-service AST, 9-600259 three ASTs listed as administratively closed (2500, 716, 1120 gal), 9-600535 three ASTs listed as closed-removed (2500, 716, 1120 gal), 9-496030 one UST listed as closed-removed (100 gal).

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NYR00E541 "First Transit Inc" ICIS-NPDES Non-Major facility.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: In process of cleanup by Exxon.

Visual Observations from Curbside Site Assessment:

Tire company with numerous trucks and tires visible on-site. Monitoring wells border the property to the east.

Other Notes:

Former SOCONY refinery use, currently being cleaned up by Exxon.



Easternmost building.



Possible well.



Main building.



Wells at east border.

BOA Site Report

Site Name: Dresser Rand Company 1
Site Number: 23

Location: Located on N 4th St, north of Coleman St

Current Use: NA

Occupancy: Occupied
Site Address: 605 Fourth Street N.
Tax ID: 94.048-1-28
Acres: 0.16

Owner: Dresser-Rand Company

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: 4th Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: 4th St

S: Parking Lot

E: 4th St and Railroad

W: Dresser-Rand

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Unknown

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-386634 17 ASTs closed; 10 USTs closed; 3 ASTs Converted to Non-Regulated Use; 9 ASTs In Service; 9-000259 No Info Available, 9-000308 No Info Available, 9-000289 No Info Available.

Spill Event Site: Yes **Status:** Open **Comments:** 0408322 open; 15 closed spills including: 9212970, 9311272, 9410189, 8701613, 9110616, 9203255, 9203307, 9208507, 9208913, 9109193, 9975579, 0811369, 9212687, 9102979, 9515882.

Hazardous Waste: Yes **Comments:** 3600900014, NYD002123644, 1000005055, 1400014684, NEI35396, NY0094781, 14760DRSSRPOBOX "Dresser Rand" AIRS/AFS, ICIS, NPDES PERMIT, TRI REPORTING FORM, AIR.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Section of Dresser-Rand Parking Lot.

Other Notes:

NA



View from the southeast.

BOA Site Report

Site Name: City of Olean Water Treatment Plant
Site Number: 24

Location: Located on the southeast corner of E Pine St and River St.

Current Use: Water treatment facility.

Occupancy: Occupied
Site Address: 1332 River Street
Tax ID: 94.041-4-1
Acres: 4.67

Owner: City Of Olean

Brownfield: Yes
Zoning: R-3
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Rine and River Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: Yes

Other Access: NA

Adjacent uses:

N: Pine Street and Railroad

S: Residential

E: River Street

W: Water treatment Building

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 6

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 2

Original Use: Unknown

Current Use: Water treatment facility.

Condition: Good

Building Notes: City Filtration Plant 2002 on sign. Multi Buildings onsite. Mix of brick, block and wood structures.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600575 In-service AST (4000 gal), 9-000403 No Information Available, 9-000425 No Information Available.

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NY0258890 "Olean WTP" ICIS, NPDES.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Vacant property with sidewalk running across property. Multiple buildings on large property. Transformer visible onsite.

Other Notes:

NA



View from Pine.



View from Pine.



Water Pant from RR Tracks.



Water Plant.

BOA Site Report

Site Name: Continental School of Beauty
Site Number: 25

Location: Located at the northwest corner of N Barry St and Delaware Ave.

Current Use: Trade School.

Occupancy: Occupied
Site Address: 517 Barry Street N.
Tax ID: 94.057-3-9
Acres: 0.52

Owner: Park Centre Development Inc.

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Barry Street

Pedestrian Access: Yes

Rail Access: No

Water Access: Waterway to the east

Other Access: NA

Adjacent uses:

N: Parking

S: Delaware and Parking

E: Barry St N and Covered Wagon Tours

W: Parking and EADE Fitness

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Social Security Administration.

Current Use: Trade School.

Condition: Good

Building Notes: One Story Brick Building.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Open **Comments:** 0275307 - unknown amount of gasoline affecting soil.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

NA



View from the northeast.



View from the west.



From Delaware St southwest.



View from the southeast.

BOA Site Report

Site Name: Covered Wagon Tours LLC
Site Number: 26

Location: Located east of N Barry St, between Albany Ave and Delaware Ave.

Current Use: Bus /Tour Operator - Transportation

Occupancy: Occupied
Site Address: 502 Barry Street N.
Tax ID: 94.057-4-33
Acres: 1.35

Owner: Park Centre Development Inc.

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Barry and Delaware Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: Just west of the waterway

Other Access: NA

Adjacent uses:

N: Barry Street Health Center/Parking

S: Delaware Ave , American Red Cross & Armed Forces Recruiting Center

E: Parking and Delaware Executive Office Suites.

W: Barry Street, Continental School of Beauty

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Bus /Tour Operator - Transportation

Condition: Excellent

Building Notes: Block and Stucco Building.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-423130 three USTs listed as closed prior to 03/91 (4000 gal, 4000 gal, 2000 gal); two USTs listed as closed-removed (4000 gal, 2000 gal); one UST listed as In Service (10000 gal); one AST listed as In Service (275 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 8908671 closed 12/4/1989; 9612793 closed 3/17/1997; 9975063 closed 5/12/1999; 0485415 closed 1/10/2005.

Hazardous Waste: Yes **Comments:** NYD012993994 RCRAINFO "Coach USA Western New York"/"Blue Bird Coach Lines" Conditionally Exempt Small Quantity Generator.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Diesel Pump located next to tank bed. Located east of building.

Other Notes:

NA



View of east side and tank.



View at Delaware and Barry.



Parking on north Side.



Diesel dispenser.

BOA Site Report

Site Name: Hampton Inn

Site Number: 26

Location: Located at the northeast corner of Main St and N Union St.

Current Use: Hotel

Occupancy: Occupied
Site Address: 101-09 Main Street
Tax ID: 94.049-2-23
Acres: 2.01

Owner: Olean Lodging Associates, LLC

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Main Street

Pedestrian Access: Yes

Rail Access: No

Water Access: Waterway to the north

Other Access: NA

Adjacent uses:

N: Berm and Waterway

S: Main Street, Pizza Hut and Parking

E: Scooters Rest

W: Union Street and Park

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 3

Original Use: Unknown

Current Use: Hotel

Condition: Excellent

Building Notes: Appears to be new.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 9109335 closed 10/13/1992; 9515830 closed 1/19/1997.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Numerous wells onsite - flush mount and stickup wells.

Other Notes:

NA



View from Union N.



Main Entrance across Main St.



Hotel across Union.



Stickup well.

BOA Site Report

Site Name: Delaware Park Center
Site Number: 27

Location: Located east of N Union St between Main St and Delaware Ave.

Current Use: 2 buildings - plaza, 1 building - Burger King.

Occupancy: Occupied
Site Address: 502 Union Street N.
Tax ID: 94.057-3-39
Acres: 5.77

Owner: Park Centre Development Inc.

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Union, Delaware and Barry Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: City Garage, Higgins St, Christopher Columbus Lodge, Fire Department

S: Delaware St, Community Bank

E: Continental School of Beauty, Barry St N, City Garage

W: Union St, Rt 16

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 3

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: 2 buildings - plaza, 1 building - Burger King.

Condition: Fair

Building Notes: One story strip plaza and parking lots. Burger King is a standalone building. Picture of sign with tenants taken.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600683 two USTs listed as closed-removed (550 gal, 2000 gal).

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

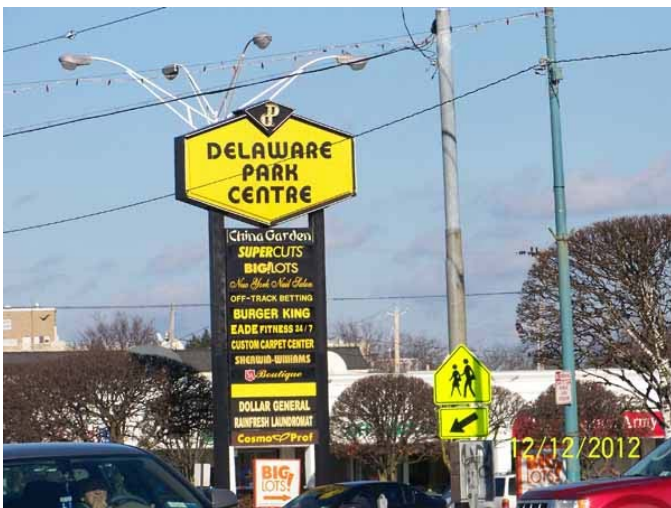
Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Transformer and Drums located behind the Salvation Army. Transformer located behind the Big Lots Section.

Other Notes:

NA



Plaza sign.



Smaller plaza building.



Transformer and drums.



Vent on back of building.

BOA Site Report

Site Name: Indeck Olean Energy Center
Site Number: 28

Location: Located west of Leo Moss Dr, between two RR tracks (North and South of site).

Current Use: Indeck Energy Facility.

Occupancy: Occupied
Site Address: 140 Moore Avenue
Tax ID: 94.047-1-28
Acres: 16.83

Owner: Indeck-Olean LP

Brownfield: Yes
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Moore Avenue
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Railroad
S: Wooded
E: Cat County Offices
W: Wooded/railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Unknown
Current Use: Indeck Energy Facility.
Condition: Good
Building Notes: Large Energy Facility Building.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600095, 9-000331, 9-000342 No Further Information Available.

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: Yes **Comments:** NY0245089, NEINY009R003, 3600900043 "Indeck-Olean Energy Center" FIS, NPDES, EGRID, PCS, CAMDBS, EIA-860, TRIS.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Energy facility - numerous tanks and pipes visible from road.

Other Notes:

NA



View from northeast.



Main energy building.



View from the northeast.

BOA Site Report

Site Name: Jordan's Restaurant

Site Number: 29

Location: Located at the northwest corner of Wayne St and 7th St.

Current Use: Jordan's Restaurant with separate shed.

Occupancy: Occupied
Site Address: 800 Wayne Street
Tax ID: 94.048-2-17
Acres: 0.29

Owner: Callahan, Karen

Brownfield: No
Zoning: RT
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Wayne & 7th Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Residential

S: Residential

E: Jak's Burger Shak

W: Residential

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 2

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Jordan's Restaurant with separate shed.

Condition: Good

Building Notes: Single story block restaurant with small wood-framed shed.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 1200920 closed 4/30/2012.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Jordan's Restaurant.

Other Notes:

NA



Shed.



Rear parking.



View from west.



View from south.

BOA Site Report

Site Name: Ka-Bar Knives Inc.

Site Number: 30

Location: Located north of Homer St, west of Oregon Rd.

Current Use: Manufacturing

Occupancy: Occupied
Site Address: 200 Homer Street
Tax ID: 94.001-2-13.3
Acres: 3.45

Owner: Park Centre Development Inc

Brownfield: No
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant

S: Homer Street, Vacant

E: Vacant

W: Metal Building

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Manufacturing

Condition: Excellent

Building Notes: Metal Building.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 9109143 closed 8/11/1992.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:
NA

Other Notes:

Manufacturing on-site.



East side of building.



Building street side.



West side of building.



West side of site.

BOA Site Report

Site Name: City of Olean Garage
Site Number: 31

Location: Located on the west side of Barry St between Delaware Ave and Main St.

Current Use: City garage and storage.

Occupancy: Occupied
Site Address: 701 Barry Street N.
Tax ID: 94.057-3-8
Acres: 1.51

Owner: City Of Olean-City Garage

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Barry and Higgins

Pedestrian Access: Yes

Rail Access: No

Water Access: Waterway to the east

Other Access: NA

Adjacent uses:

N: A Cut Above Salon, Jones Realty

S: Delaware Park Center, Plaza

E: Barry St N, Residential

W: Higgins Street, Salvation Army

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: City garage and storage.

Condition: Fair

Building Notes: Block building with flat roof.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-414344 four USTs listed as closed-removed (275 gal, 275 gal, 500 gal, 500 gal); two USTs listed as In Service (10000 gal each); one AST listed as In Service (275 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 8503983 closed 9/14/1987; 9600741 closed 9/12/1996; 9610991 closed 7/28/1997; 9713767 closed 8/10/1998; 9975660 closed 2/25/2000.

Hazardous Waste: Yes **Comments:** NYR000081224 RCRAINFO "Safety Kleen NE Inc"/"Clean Harbors Env Services Inc" Active Conditionally Exempt Small Quantity Generator.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Dispensers observed onsite. Drums, equipment, hydraulic equipment stored and maintained onsite. Covered salt storage onsite.

Other Notes:

NA



Salt storage.



Dispenser area.



Garage from Higgins St.



Garage from Barry St N.

BOA Site Report

Site Name: MJW Technical Services Site Number: 32

Location: Located on the south side of Root St at the intersection of Keating St.

Current Use: Multi Tennant.

Occupancy: Occupied
Site Address: 243 Root Street
Tax ID: 94.049-4-48
Acres: 3.4

Owner: MJW Technical Services, Inc.

Brownfield: No
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Root, Keating and Coleman Streets

Pedestrian Access: Yes

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Root and Keating Streets, Residential

S: Coleman Street and Residential

E: Residential

W: Railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Multi Tennant.

Condition: Fair

Building Notes: Lynx Ship Center, Kaman Industrial Technologies, G&C Countertops, MJW Technical Services.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-000231 No Information Available.

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

NA



View from Coleman and RR.



Truck dock on Coleman St.



Truck dock from Root St.



Northeast from Root St.

BOA Site Report

Site Name: National Grid Station 30 and Vacant Land
Site Number: 33

Location: Located at the northwest corner of W Oak St and Spruce St.

Current Use: NA

Occupancy: Underutilized
Site Address: 310 Oak Street W.
Tax ID: 94.040-1-27
Acres: 2.07

Owner: National Grid

Brownfield: No
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Oak and Spruce Streets
Pedestrian Access: Yes
Rail Access: Yes North and West
Water Access: No
Other Access: NA

Adjacent uses:

N: Vacant and Railroad
S: Oak Street Vacant, residential
E: Spruce Street, residential, vacant
W: Railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 0
Original Use: NA
Current Use: NA
Condition: Not Applicable
Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

310 West Oak Street on large sign. 3 Large Transformers and utility lines across site.

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to two railroad lines.



West edge from Oak St.



View of Nat Grid Station.



View from Oak St.



View from Spruce and Oak.

BOA Site Report

Site Name: Olean Central School District
Site Number: 34

Location: Located south of Wayne St, north of Reed St, east of N 7th St.

Current Use: Schools and athletic fields.

Occupancy: Occupied
Site Address: 410 Sullivan Street W.
Tax ID: 94.057-5-1
Acres: 28.76

Owner: Olean City Sch Dist-OHS & MS

Brownfield: No
Zoning: R-3
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Numerous

Pedestrian Access: Yes

Rail Access: Yes

Water Access: No

Other Access: NA

Adjacent uses:

N: Residential

S: Residential

E: Railroad/commercial

W: Residential/commercial

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 5

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 3

Original Use: Unknown

Current Use: Schools and athletic fields.

Condition: Good

Building Notes: Currently school buildings.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 9801286 closed 4/25/2001; 9875109 closed 11/4/1998; 0175218 closed 10/9/2001.

Hazardous Waste: Yes **Comments:** NYR000023994, NYR000024000 "Olean Central School District" RCRAINFO; NYD074023961 "Olean High School."

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Olean School District with sports fields and maintenance building.

Other Notes:

NA



Southernmost academic bldg.



Westernmost building.



North entrance.



View from Wayne St.

BOA Site Report

Site Name: Pizza Hut

Site Number: 35

Location: Located on the southeast corner of Main St and N Union St.

Current Use: Pizza Hut and Parking Lot.

Occupancy: Occupied

Site Address: 610 Union Street N.

Tax ID: 94.057-3-1

Acres: 0.52

Owner: Dixie Gardens Apartments, Inc.

Brownfield: Yes

Zoning: GC

Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Main Street and Union Street

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Main St, Hampton Inn

S: Fire Department

E: Higgins Street, Jones Realty

W: Union Street, Car Wash, 7/11 Gas Station

Land Use History: Exxon/Mobil Gasoline Station.

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Exxon/Mobil Gasoline Station.

Current Use: Pizza Hut and Parking Lot.

Condition: Excellent

Building Notes: Appears to be a new build. Brick and Stucco.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Open **Comments:** 9306639 "Pizza Hut/Exxon Mobil" MTBE and Gasoline affecting groundwater.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Remediation System located east of building in a green trailer behind a 6 foot wooden fence. Vent attached to dedicated telephone pole. Sign on fence Gate - Emergency Contact is Groundwater & Environmental Services. Unknown if system is operating.

Other Notes:

Spill report is named "Pizza Hut/ExxonMobil" which indicates that the property was formerly a gasoline station.



View from north.



Onsite Remediation System.



View of on-site building.



Street view from Union St.

BOA Site Report

Site Name: Rontina

Site Number: 36

Location: Located on N 4th St, south of Penn Ave, at the western terminus of Gardiner Ave.

Current Use: Dozen cars in lot. unknown use

Occupancy: Occupied
Site Address: 921 Fourth Street N.
Tax ID: 94.048-1-21.1
Acres: 2.46

Owner: Franklin St R.E. Partnership

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: 4th Street and Penn Avenue

Pedestrian Access: Yes

Rail Access: Yes to the west

Water Access: No

Other Access: NA

Adjacent uses:

N: Penn Ave, Residential

S: Underutilized Storage

E: 4th St, residential, Glen and Dick Auto Machine Shop

W: Railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Dozen cars in lot. unknown use

Condition: Good

Building Notes: Single story block and metal structure with flat roof.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: Yes **Comments:** 9-439843 two USTs listed as closed-removed (8000 gal, 1000 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 9610968 closed 2/12/1998.

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Transformers observed along building north side.

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to former Van Der Horst Plant 1.



Vac land and building.



Building front from 4th St.



Transformer - N side.



North side of building.

BOA Site Report

Site Name: Scott Rotary Seals
Site Number: 37

Location: Located on the south side of Franklin St, northeast of RR tracks.

Current Use: Scott Rotary Seals

Occupancy: Occupied
Site Address: 301 Franklin Street
Tax ID: 94.040-1-29.2
Acres: 1.96

Owner: DST Properties NY, LLC

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Franklin Street
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Self Storage
S: Railroad
E: Railroad
W: Valley Tire Co

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Unknown
Current Use: Scott Rotary Seals
Condition: Excellent
Building Notes: New building

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: Yes **Status:** Closed **Comments:** 0811100 closed 2/16/2010.

Hazardous Waste: Yes **Comments:** NYR000182568 "DST Properties NY LLC" RCRAINFO Active Large Quantity Generator; NYD000822932 "RG Scott" RCRAINFO.

DEC Remediation Site: Yes **Comments:** BCP Site C905036 "Scott Rotary Seals" Historically a portion of a larger petroleum refinery & MOSF known as the former SOCONY Vacuum facility which operated from the late 1800s until the 1950s. COCs include petroleum products & arsenic.

Environmental Due Diligence: Certificate of Completion issued in 2012.

Visual Observations from Curbside Site Assessment:

Appears to be a probable remediation trailer at the south of the property. Monitoring wells border the property to the west.

Other Notes:

NA



View from Franklin St.



Possible remediation trailer.

BOA Site Report

Site Name: Swatts Baking Company and Ka-Bar Lots Site Number: 38

Location: Located north of Homer St, west of Oregon Rd.

Current Use: NA

Occupancy: Occupied
Site Address: 220 Homer Street
Tax ID: 94.032-1-2.2
Acres: 0.58

Owner: Park Centre Development Inc

Brownfield: No
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Swatts Bakingn and Ka-Bar Buildings

S: Homer Street, Vac

E: Vac

W: Parking lot and access roads

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: NA

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600462 one AST listed as closed-removed (10000 gal).

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Roadside Wedge with parking lots for buildings, fire, & electric utilities.

Other Notes:

NA



Roadside wedge.

BOA Site Report

Site Name: Underutilized Warehouse and Storage Area Site Number: 39

Location: Located on the western side of N 4th St, south of Gardiner Ave.

Current Use: Storage

Occupancy: Underutilized
Site Address: 869 Fourth Street N.
Tax ID: 94.048-1-21.2
Acres: 0.37

Owner: Marra, Mary B.

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: 4th Street

Pedestrian Access: Yes

Rail Access: Yes to West

Water Access: No

Other Access: NA

Adjacent uses:

N: Vacant land and Rontina Company

S: Residential

E: 4th Street and Residential/Lots

W: Railroad

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Storage

Condition: Poor

Building Notes: Sheet metal Building with flat roof.

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

NA

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to former Van Der Horst Plant 1. Contaminants at the former Van Der Horst Plant 1 may have migrated onto this property.



Building from 4th St N.



Building from 4th St N.

BOA Site Report

Site Name: Vacant Cytec Property Site Number: 40

Location: Located on the southeast corner of Buffalo St and Constitution Ave

Current Use: NA

Occupancy: Vacant
Site Address: 1427 Buffalo Street
Tax ID: 94.047-1-41
Acres: 0.41

Owner: Cytec Olean Inc.

Brownfield: No
Zoning: I-2
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Buffalo Street and Constitution Avenue

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Buffalo Rd/Vacant Brownfield

S: Cytec

E: Buffalo Rd/Vacant Brownfield

W: Constitution/Cat County Parking

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: NA

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: Yes

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Vacant corner lot.

Other Notes:

Listed as underutilized in Pre-Nomination Study. Adjacent to Cytex Industries Facility.



View from the north.

BOA Site Report

Site Name: Verizon New York, Inc.
Site Number: 41

Location: Located on the northeast side of Buffalo St, south of RR tracks.

Current Use: Verizon Phone Company.

Occupancy: Occupied
Site Address: 1480 Buffalo Street
Tax ID: 94.047-2-28.2
Acres: 3.56

Owner: Verizon New York Inc.

Brownfield: No
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No
Road Access: Buffalo Street
Pedestrian Access: No
Rail Access: Yes
Water Access: No
Other Access: NA

Adjacent uses:

N: Railroad
S: Buffalo Rd and parking
E: Vacant
W: Cat County Offices

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1
Gross Floor Area (sq. ft.): 0
Year Built: 0
Stories: 1
Original Use: Unknown
Current Use: Verizon Phone Company.
Condition: Fair
Building Notes: Single story block structure.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-418331 No Information Available.

Spill Event Site: Yes **Status:** Closed **Comments:** 9206096 closed 12/31/1992; 9707386 closed 8/5/1998, 9800611 closed 8/5/1998.

Hazardous Waste: Yes **Comments:** NYD987030962 "New York Telephone Co" Active Conditionally Exempt Small Quantity Generator.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Verizon Offices.

Other Notes:

NYSDEC Cleanup site bordering property to the south.



Verizon building.



Sign bordering property to S.

BOA Site Report

Site Name: 7-11 Gas Station
Site Number: 42

Location: Located at the southwest corner of N Union St and Main St.

Current Use: Gas Station

Occupancy: Occupied
Site Address: 611-13 Union Street N.
Tax ID: 94.049-2-24.1
Acres: 0.6

Owner: Countryside ALF, LLC

Brownfield: Yes
Zoning: GC
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Union and North Union Streets

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: North Union, Park

S: The Car Pool car wash, Residential

E: Union Street, Pizza Hut

W: Residential

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Gas Station

Condition: Fair

Building Notes: One Story Brick Building.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600205 three USTs listed as In Service (10000 gal, 8000 gal, 1000 gal).

Spill Event Site: Yes **Status:** Open **Comments:** 1205456 open; 0201809 closed 5/22/2002; 9100614 closed 8/15/1994; 9812928 closed 7/3/2000; 9512954 closed 2/12/1996; 9505853 closed 9/18/1995; 0651501 closed 12/14/2006.

Hazardous Waste: Yes **Comments:** NYD986944544 "Sunoco Service Station" RCRAINFO.

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Active Gas station with USTs.

Other Notes:

NA



Street view.



View from northeast.



View from Union St.

BOA Site Report

Site Name: Casella Waste Services Site Number: 43

Location: Located southwest of Homer St and Oregon Rd, north of RR tracks.

Current Use: Cassella office, maintenance and dumpsters

Occupancy: Occupied
Site Address: 225 Homer Street
Tax ID: 94.032-1-2.8
Acres: 5.74

Owner: Casella Waste Mgt of NY, Inc.

Brownfield: Yes
Zoning: I
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: No

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Homer Street

S: Park Center Warehouse, Vacant

E: Vacant with Brick Building

W: Benson Construction

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 1

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 1

Original Use: Unknown

Current Use: Cassella office, maintenance and dumpsters

Condition: Fair

Building Notes: Steel building.

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: Yes **Comments:** 9-600530 one 10000 AST listed as closed-removed (10000 gal), four ASTs listed as In Service (12000 gal, 300 gal, 300 gal, 200 gal).

Spill Event Site: Yes **Status:** Closed **Comments:** 9516439 closed 4/5/1996; 0075367 closed 9/18/2000; 0701678 closed 5/11/2007.

Hazardous Waste: Yes **Comments:** NYR00D603 "Cassella Waste Services" National Pollutant Discharge Elimination System (ICIS-NPDES).

DEC Remediation Site: No **Comments:** NA

Environmental Due Diligence: NA

Visual Observations from Curbside Site Assessment:

Dumpster and truck staging, maintenance. Large AST observed onsite.

Other Notes:

NA



Large AST onsite.



Truck storage.



Storage yard.



Building from northwest.

BOA Site Report

Site Name: Playground
Site Number: 44

Location: Located at the southeast corner of Homer St and Johnson St.

Current Use: NA

Occupancy: TBD
Site Address: 299 Homer Street
Tax ID: 94.040-1-32
Acres: 1.6

Owner: MJ Painting Contractor

Brownfield: Yes
Zoning:
Use Potential: TBD



Property Information

Infrastructure: TBD

Comments: TBD

Proximity to Existing Transportation Networks:

Public Transit Access: No

Road Access: Homer Street

Pedestrian Access: Yes

Rail Access: No

Water Access: No

Other Access: NA

Adjacent uses:

N: Residential. Northeast is MJ Painting Corp and Homer Redevelopment.

S: Johnson St and Southern Tier Expressway, RR tracks

E: Southern Tier Expressway and Franklin St Vacant Lot

W: Residential

Land Use History: Unknown

Notable Site Features: NA

Building Information

Number of Buildings: 0

Gross Floor Area (sq. ft.): 0

Year Built: 0

Stories: 0

Original Use: Unknown

Current Use: NA

Condition: Not Applicable

Building Notes: NA

BOA Site Report

Environmental Information

Pre-nomination Site: No

Registered PBS or CBS Facility: No **Comments:** NA

Spill Event Site: No **Status:** Not Applicable **Comments:** NA

Hazardous Waste: No **Comments:** NA

DEC Remediation Site: Yes **Comments:** BCP: C905042. 291-299 Homer Street. Formerly owned by Socony-Vacuum Oil Company 1902-1954. The site was used for petroleum storage/refining, leather tanneries, light/heavy manufacturing, chrome plating, fertilizer manufacturing and railroad facilities.

Environmental Due Diligence: In NYSDEC Brownfield Cleanup Program.

Visual Observations from Curbside Site Assessment:

Not visited.

Other Notes:

NA



City of Olean Brownfield Opportunity Area: Market Analysis

March 2013

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EXECUTIVE SUMMARY

As a sub consultant to Bergmann Associates, Camoin Associates was commissioned to complete a comprehensive real estate market analysis of the City of Olean Brownfield Opportunity Area: Northwest Quadrant. The purpose of the analysis was to identify where opportunities might exist to promote market-feasible development and redevelopment within the BOA and the City. What follows is a summary of the major findings of our analysis and recommendations for moving forward.

Key Findings

Demographic and socioeconomic data for the BOA, City of Olean, and the region show a declining population with a lower median household income compared to Upstate New York. These trends pose a challenge for new development in the BOA as the local and regional consumer market is essentially shrinking while the local spending power of the community is already relatively modest.

A review of the regional **employment and occupation trends** show that the regional economy is losing manufacturing jobs that are being replaced with lower-wage service-sector jobs. While there has been a national decline in the manufacturing sector in recent years, the local manufacturing sector seems to be losing jobs at a much faster pace than the U.S. as a whole.

While there is not a significant amount of new industrial real estate activity occurring in the region, Olean has some of the **only available “shovel-ready” industrial property** in the County. This makes Olean a prime candidate for any future industrial opportunities.

On the other hand, there is an **oversupply of office space** in the region, particularly in Downtown Olean. Local realtors describe the local office market as “stagnant”.

Single-family homes dominate the City’s existing housing stock; most of which were built in the 1930’s. There are very **few rental properties in Olean** and almost no modern housing options available, despite evidence of demand.

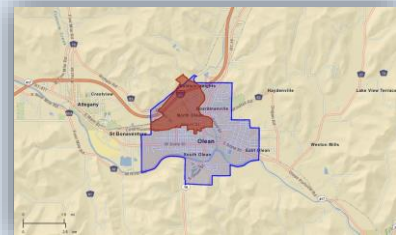
Some local businesses have a **hard time attracting and retaining** employees; especially for mid- and upper-level management positions, citing the perceived lack of recreational opportunities in the area as well lack of acceptable housing options. Local businesses have greater success retaining employees that are either from Olean or a similar region.

The retail sales data shows that there is **significant sales**

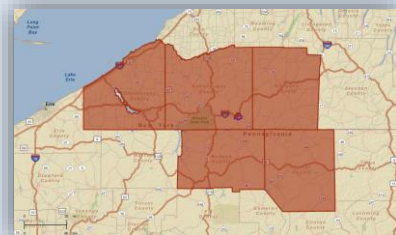
Olean BOA



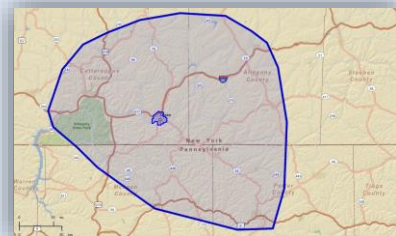
City of Olean (blue) & BOA (red)



5-County Economic Region



Retail Trade Area



leakage in several retail categories. It is likely that much of this sales leakage can be attributed to two things 1) residents of the trade area traveling 1-2 hours north to the City of Buffalo for a greater diversity of retail and service offerings, and 2) online sales of goods readily available in the trade area.

Olean has some **growing momentum in the retail sector** both in the Olean Center Mall, which recently opened a new Kohl's Department Store, and downtown along Union Street, which is undergoing a significant revitalization project spearheaded by the City. Additionally, there is new retail development occurring nearby.

Several local developers and real estate agents noted that the **City of Olean is great to work with** on development projects. This development-friendly attitude is an important asset in its own and could even be used to market the City to others less familiar with the region.

Opportunities & Recommendations

Industrial Market Opportunities

Over a period of many years, the industrially-zoned properties in the BOA have been off the market due to environmental concerns, which have since been investigated and are currently being remediated through the Brownfield Cleanup Program. Once they become available, **the BOA will contain the most attractive sites for new industrial development in the area** given the limited supply of industrial properties available elsewhere in the County. Furthermore, these sites have key advantages above and beyond their availability, namely:

- Superior access to rail transportation,
- Direct and proximate access to I-86 (albeit with certain height restrictions due to the railroad bridge for a portion of those parcels),
- Substantial Brownfield Cleanup Program tax credits that can offset a portion of capital costs,
- Built-in operational support via the Cattaraugus County IDA's generous uniform tax exemption policy for former brownfields,
- Availability of all required infrastructure (water, wastewater, electric, gas, telecommunications),
- Substantial contiguous acreage to accommodate large scale development,
- Access to workforce directly in the City itself.

Considering these factors, almost any new industrial development in the region is likely to occur in the BOA once these parcels come on the market (i.e. post remediation).

Furthermore, if New York State allows hydrofracking techniques to be use within the State to exploit non-conventional sources of natural gas, there would be **a significant opportunity for Olean to capitalize on the expected demands of the shale gas industry**. Gas companies typically look for existing warehouse space to lease under short-term conditions (3-5 years). As the existing supply of warehouse space becomes occupied, there might be an opportunity for developers to construct new space to meet the demands of businesses coming into the area, particularly for larger companies that have more substantial needs. Other space needs include high bay space with high-clearance doors to allow for machinery to be brought in via tandem trailer for repairs and maintenance. Lay-down space for sand and piping coupled with rail access is a major need for this industry. There is a certain amount of need for space for machinists and other technicians to assemble equipment. (Other gas industry-related opportunities are covered below under office and residential trends).

Because of the potential for future growth in general industrial use as well as related to the shale gas industry, we strongly **recommend that the City keep its industrial properties in the BOA available for industrial development** and not allow them to be converted to other uses.

Retail Market Opportunities

While there are growing retail opportunities for the City of Olean and surrounding community, retail may not be the best use for properties in the BOA. As mentioned in the above section, the BOA contains some of the prime industrial sites in the region making it highly attractive to any new industrial development. New retail development in the area (but not necessarily in the BOA) will complement and enhance the attractiveness of the BOA's industrial properties and other offerings. Therefore, **the following retail recommendations should be viewed as opportunities for the City as a whole** and not necessarily specific to the BOA.

There is significant demand for full service restaurants; specifically national chain, family-style restaurants such as Chilies, Tully's, TGI Friday's, Ruby Tuesday, Olive Garden, Panera Bread etc. Olean has a history of having some very good eating establishments and was once the go-to area for dining out, but consumer tastes changed and many of the restaurants did not adapt and are no longer in the area. They have not been replaced to meet this altered consumer market.

Olean continues to be a shopping destination for residents across the region serving urban and suburban residents living in adjacent communities as well as residents from the surrounding rural areas. Recent wins in the retail sector indicate that the area is growing its foothold as the regional shopping center for this market, whose only other options to access a greater assortment of goods include driving to the City of Buffalo or online shopping. **The City may be able to continue enhancing its retail offerings via this regional consolidation.**

Clothing Stores is one sector showing significant sales leakage from the Regional Trade Area; particularly women's clothing. Another industry that has strong potential according to the data is Electronic & Appliance Stores, which is a broad retail sector consisting of everything from cell phones to refrigerators. While some of this leakage may be going to online sales, there could be an opportunity to re-capture some of it if a significant amount of leakage is occurring in a specific sector (large appliances, for example). Additionally, the data suggests that there is modest demand for Office Supplies, Stationary, & Gift Stores, Health & Personal Care Stores (pharmacies), Automobile Dealers, and Used Merchandise Stores.

While Olean is a service center for the region, most residents make an occasional trip to Buffalo to access a much wider range of retail goods and services. Additionally, regional residents do a significant amount of online shopping to purchase goods not available to them locally. Many national retailers that typically embrace the "big box" are seeing the potential to capture smaller markets like Olean by creating scaled down versions or "mini-box" models for these areas. They sometimes even cluster together to create neighborhood-style shopping centers and some companies are becoming more open to occupying second-generation space, which can allow them to avoid some development issues. **There may be a potential opportunity for Olean to attract a few scaled-down versions of national chains and recapture a good portion of the consumer spending that currently "leaks" up to Buffalo.**

Another suggestion from the interviews was a local farmers market, to give "occasional retailers" such as farmers and other local entrepreneurs an opportunity to sell their goods.

The City should not completely discount the BOA for retail development; however, it should continue to focus its effort on revitalizing its existing retail hubs - Olean Center Mall and Union Street. **The BOA could use some neighborhood-sized convenience retail and services without jeopardizing larger developments elsewhere.**

Residential Market Opportunities

Based on the data analysis and discussions with local realtors and other stakeholders, Olean lacks modern rental properties. There is a development opportunity to provide modern rentals in the range of \$1,000 to \$1,500 a month. The target market for these units includes working professionals, singles and couples, that may be starting their careers and not yet ready or willing to invest in property. It may also include empty-nesters and retirees. For example, we have heard from both Dresser-Rand and Olean General Hospital that there is an immediate need for housing that would allow new employees to quickly find suitable options for short and mid-length stays. This could be in the form of **apartment blocks, duplexes, row-houses as well as a limited number of quality single family houses for rent**. As with national trends, there would also be an opportunity to serve those retirees wishing to downsize from their single family house into an apartment in an urban environment. For most of the products in demand, appliances and finishes **should be modern and good-quality, but do not need to be in the high-end/luxury range**. Some furnished apartments may be attractive for individuals only planning on staying in the area short-term. At the rents specified above, we believe these products would be both market-based and financially feasible.

The ideal setting for this type of development is in the eastern portion of the BOA along the river.

Since the properties directly across the river are in the floodplain and mostly undeveloped, this portion of the BOA provides an attractive view-shed coupled with easy access to many of the City's largest employers, including Dresser Rand and Olean General Hospital. Locational and view-shed conditions would allow a developer to charge premium rents and would serve to enhance demand for the end product. However, to allow this to occur, **the City would need to be proactive in terms of zoning and other considerations**.

Additionally, if New York State does allow fracking in the future and Olean is able to attract gas-related companies, there will be a significant increase in demand for rental properties to accommodate the workforce associated with this development. Based on the experience of other communities in such situations, there would almost certainly be **demand for one or more extended-stay hotels**.

Additional Recommendations

During the interviews conducted for this project, it was brought to our attention that the City's wastewater treatment plant is at capacity and not able to accommodate new development without potentially significant mitigation costs, which would be the developer's responsibility to cover. This issue alone can be a deal breaker for developers as the additional costs they would be obligated to pay can make an otherwise viable project unfeasible. The City of Olean should make it a top priority to mitigate the issues with the wastewater treatment plant and find a way to ensure that mitigation costs will not be tacked onto development projects.

Office Market

It is not expected that there will be any significant demand for new office space in the coming years. Regarding the BOA, the sole development of office space would not be a lucrative investment; however, some new small-scale office space may be warranted to support other primary uses for the area.

INTRODUCTION

Through the New York State Brownfield Opportunity Area Program, the City of Olean is planning for the environmental cleanup and re-development of vacant and underutilized properties in its northwest quadrant. As a sub consultant to Bergmann Associates, Camoin Associates was commissioned to complete a comprehensive market analysis of the Olean Brownfield Opportunity Area (referred to as the 'Olean BOA' or simply the 'BOA').

The market analysis consists of an overview of the region's economic, demographic, and socioeconomic trends and an assessment of the regional office, industrial, retail, and housing real estate markets. The purpose of this effort is to identify market-feasible redevelopment opportunities for properties within the BOA that will serve as catalysts for revitalization both in the BOA and throughout the City of Olean.

Much of the data in this report were purchased from ESRI Business Analyst Online (ESRI) and Economic Modeling Specialists, Inc. (EMSI). ESRI's base data is the 2000 and 2010 Census. It uses proprietary statistical models and updated data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to project current statistics and future trends. ESRI data is often used for economic development, marketing, site selection, and strategic decision making. For more information, visit www.esri.com.

EMSI data are compiled from several sources, including the U.S. Census Bureau and U.S. Departments of Health and Labor using specialized proprietary processes and models to estimate current statistics and predict future trends. Visit www.economicmodeling.com for additional information.

In addition to gathering statistical data, Camoin Associates spoke with local business owners, economic development officials, City officials, local realtors, and other stakeholders to gain information on the trends occurring within region.

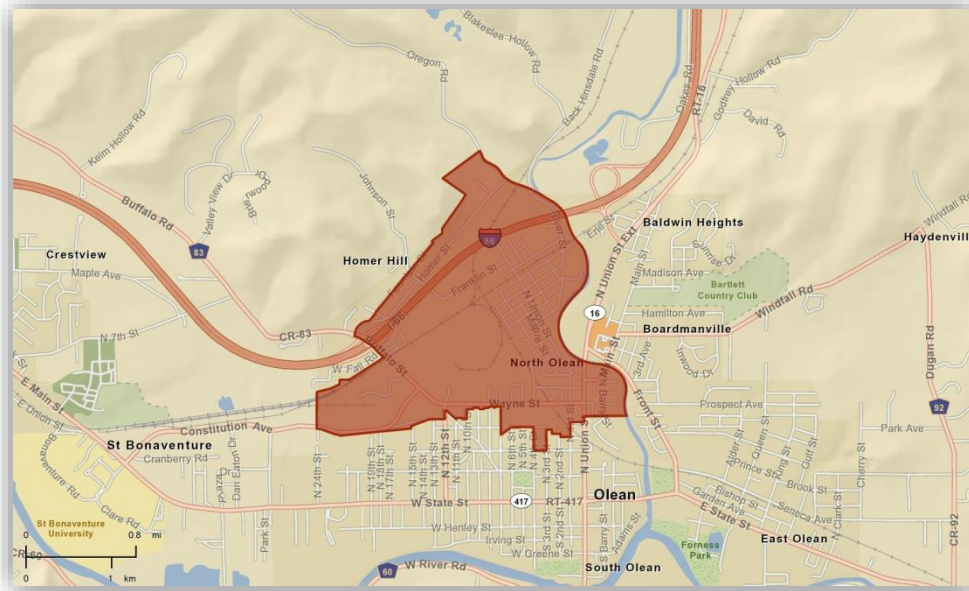
MARKET ANALYSIS STUDY AREAS

Geographies Studied

Several geographies are assessed as part of this market analysis. A brief description of these regions and their general purpose is provided below along with images illustrating the extent of each.

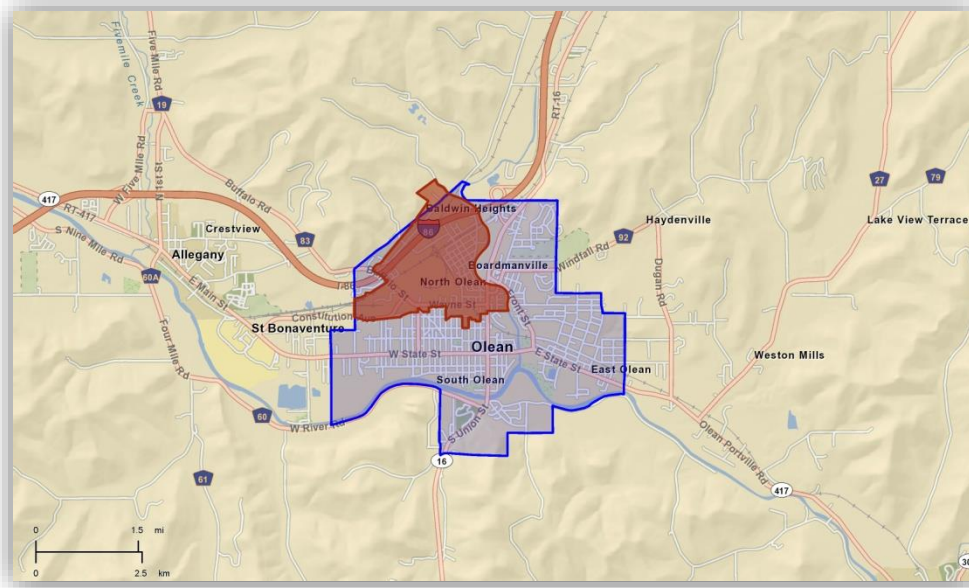
Olean BOA - The portion of the City of Olean included in the designated BOA.

Olean BOA



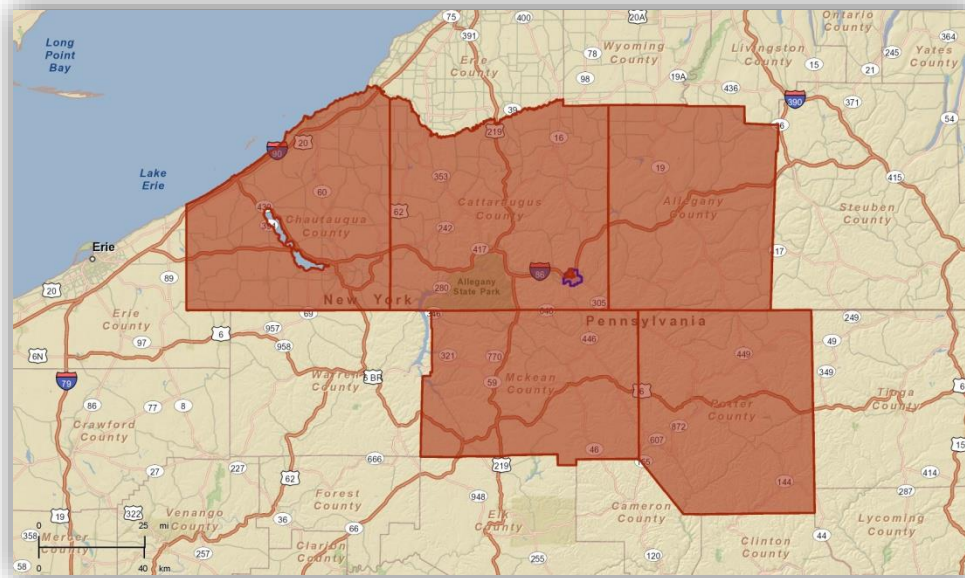
City of Olean - As shown below, the BOA is located in the northwest quadrant of the City. Demographic and socioeconomic data for the City is summarized to provide context to the market analysis. Additionally, the City boundary is assessed as a local trade area in the Retail Market Analysis.

City of Olean



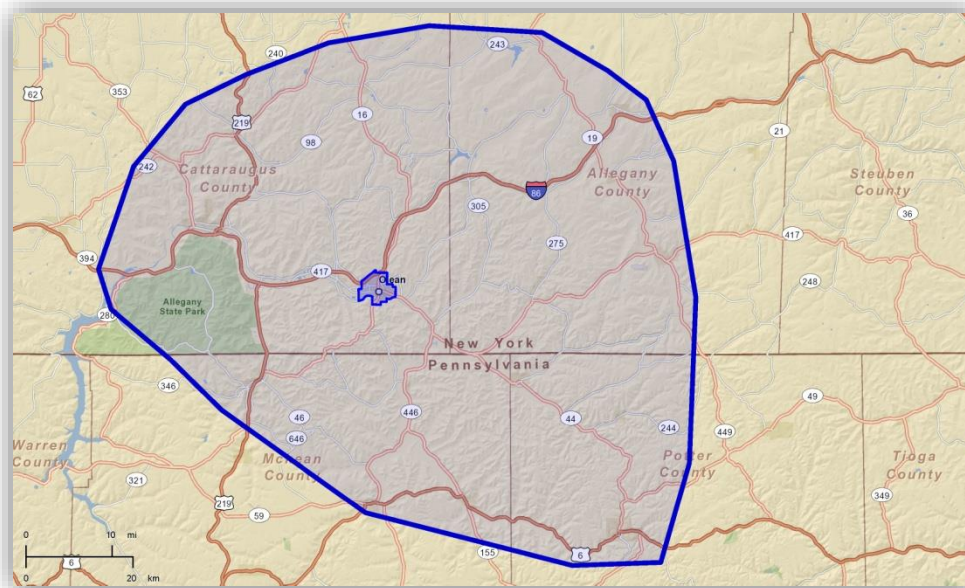
Economic Region - In order to identify important regional issues and opportunities that may impact development in the BOA, employment and industry trends in this 5-county region are examined. The Economic Region was defined considering major travel corridors, economic activity, and local knowledge.

Economic Region



Regional Retail Trade Area - This geography is the subject of the retail portion of the market analysis and represents the regions from which most (roughly 60-75%) of retail customers to Olean businesses reside. The trade area was defined with consideration of proximity to other retail centers, physical geography, drive times, and local knowledge provided by City staff. Retail market data (business sales, leakage, tapestry segmentation, etc.) are analyzed for this region.

Regional Retail Trade Area



Demographic & Socioeconomic Overview

To begin the market analysis, general demographic and socioeconomic data was reviewed to gain an understanding of past trends, existing conditions, and future projections. This information was collected for the BOA, City of Olean, Retail Trade Area, and the Five-County Economic Region. Local and regional trends in population and income were compared to those of Upstate New York and the U.S. as a whole. More detailed demographic and socioeconomic information is presented in the following sections as it relates to specific components of the market analysis; the purpose of this section is to provide a basic summary and easy comparison between the geographies studied.

The following table summarizes trends in population, households, average household size, median age, and median household income for the four geographies mentioned above. From 2000 to 2012, the population of the BOA fell by more than 10%, nearly twice the rate of decline seen in the City of Olean (-5.5%). The populations of the Retail Trade Area and the Economic Region also fell, though at slower rates. The population in all four geographies is expected to decline about 1% over the next five years (from 2012 to 2017).

Household size in all of the study areas has declined between 3% and 4% since 2000 as families have fewer children and the overall population has aged. The decline in household size is expected to continue through 2017. With an average household size of 2.10 in 2012, the BOA has the lowest household size of the geographies examined.

Because of the decline in the size of households, the number of households has fallen more slowly than the overall population in these areas, with the exception of the BOA. The rate of decline for households is below 1% for all areas except the BOA, where households declined 5.7%. These numbers suggest that residents are actively leaving the BOA, in contrast to the other areas that are more gradually declining due to a combination of factors.

Average household size is lowest in the BOA, suggesting that the area provides housing options more suitable to singles or couples without children. Household income is substantially lower in the BOA than surrounding areas (about \$31,400 in the BOA compared to over \$37,000 in the other areas). Meanwhile, the median age of the BOA, while the lowest of the study areas, is quite similar to the other geographies (around 39 in urban environments and 40 in rural regions). These indicators suggest that the BOA is inhabited by greater numbers of working people, fewer children, and/or slightly fewer retirees relative to the other geographies. Median age has increased the least in the City of Olean, suggesting that young people are being attracted to the city while the rural population ages in place.

Basic Demographics							
	2000	2012	2017	# Change 2000-2012	% Change 2000-2012	# Change 2012-2017	% Change 2012-2017
BOA							
Population	2,119	1,906	1,886	(213)	-10.1%	(20)	-1.0%
Households	953	899	899	(54)	-5.7%	-	0.0%
Average Household Size	2.19	2.10	2.08	(0.09)	-4.1%	(0.02)	-1.0%
Median Age	37.0	39.0	39.3	2.0	5.4%	0.3	0.8%
Median Household Income	\$ 26,246	\$ 31,390	\$ 35,471	\$ 5,144	20%	\$ 4,081	13%
City of Olean							
Population	15,347	14,508	14,398	(839)	-5.5%	(110)	-0.8%
Households	6,446	6,431	6,457	(15)	-0.2%	26	0.4%
Average Household Size	2.29	2.22	2.19	(0.07)	-3.1%	(0.03)	-1.4%
Median Age	38.3	39.3	39.8	1.0	2.6%	0.5	1.3%
Median Household Income	\$ 30,340	\$ 37,376	\$ 41,332	\$ 7,036	23%	\$ 3,956	11%
Retail Trade Area							
Population	124,467	121,642	120,613	(2,825)	-2.3%	(1,029)	-0.8%
Households	48,948	49,376	49,546	428	0.9%	170	0.3%
Average Household Size	2.48	2.38	2.35	(0.10)	-4.0%	(0.03)	-1.3%
Median Age	38.1	41.9	42.7	3.8	10.0%	0.8	1.9%
Median Household Income	\$ 32,558	\$ 38,565	\$ 43,352	\$ 6,007	18%	\$ 4,787	12%
Five-County Economic Region							
Population	337,648	326,941	324,698	(10,707)	-3.2%	(2,243)	-0.7%
Households	129,576	128,967	129,563	(609)	-0.5%	596	0.5%
Average Household Size	2.48	2.40	2.37	(0.08)	-3.2%	(0.03)	-1.2%
Median Age	37.4	41.2	41.9	3.8	10.2%	0.7	1.7%
Median Household Income	\$ 33,097	\$ 38,782	\$ 43,973	\$ 5,685	17%	\$ 5,191	13%

Source: ESRI

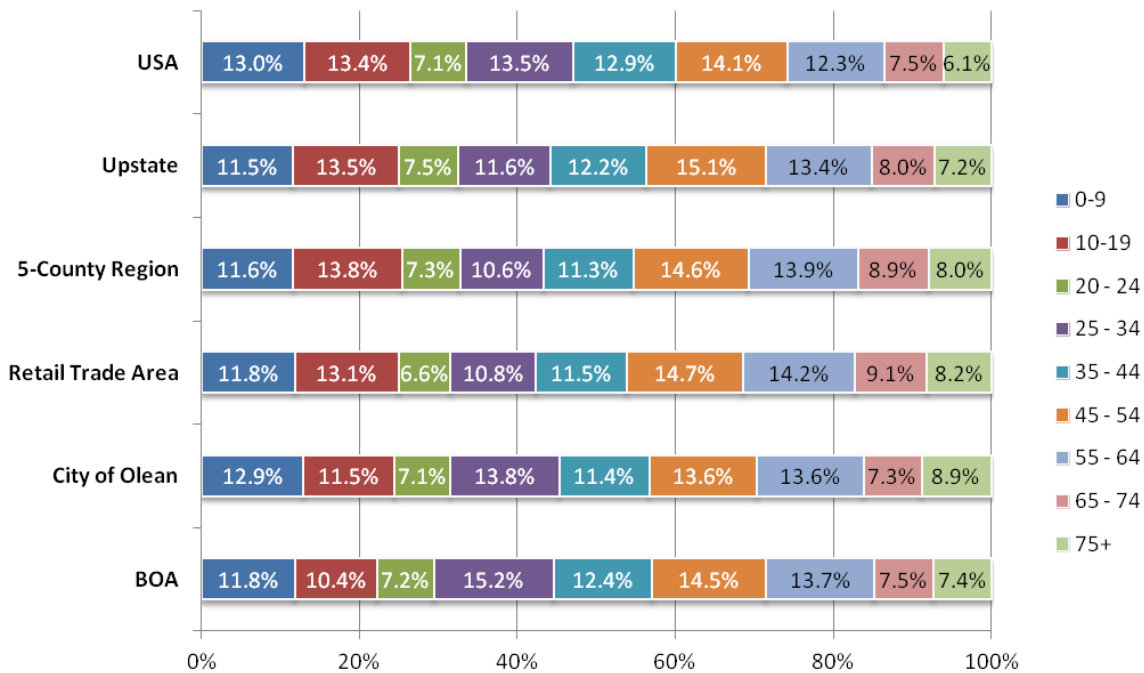
The following table summarizes historic and projected population trends for the selected geographies as well as Upstate New York (defined as all counties north of Putnam and Rockland Counties) and the United States. All of the western New York geographies have lost population since 2000, compared to Upstate New York as a whole, which gained slightly. National growth outpaced Upstate New York. These trends are expected to continue through the middle part of this decade, with the western geographies losing population, Upstate gaining slightly, and national growth continuing to outperform the others. The BOA is expected to continue losing population at a slightly faster rate than all other geographies.

Population Trends Comparison		
	% Change 2000 - 2012	% Change 2012 - 2017
BOA	-10.1%	-1.0%
City of Olean	-5.5%	-0.8%
Retail Trade Area	-2.3%	-0.8%
Five-County Economic Region	-3.2%	-0.7%
Upstate New York	2.1%	0.6%
United States	11.3%	3.5%

Source: ESRI

Population distribution of the BOA, City of Olean, Retail Trade Area, Economic Region, Upstate NY and the United States are illustrated in the chart below. The BOA has fewer children relative to all other geographies, especially in the 10-19 age grouping. There are also a notably higher number of young residents of the 25-34 age cohort represented in the BOA. Finally, there are correspondingly fewer residents aged 65+ in the BOA relative to the City, the Retail Trade Area and larger Five-County Economic Region, which includes more rural areas. The age distribution data suggests that the BOAs population consists of individuals in their late 20's and early 30's that have not yet started families.

Age Distribution, 2012



Source: ESRI

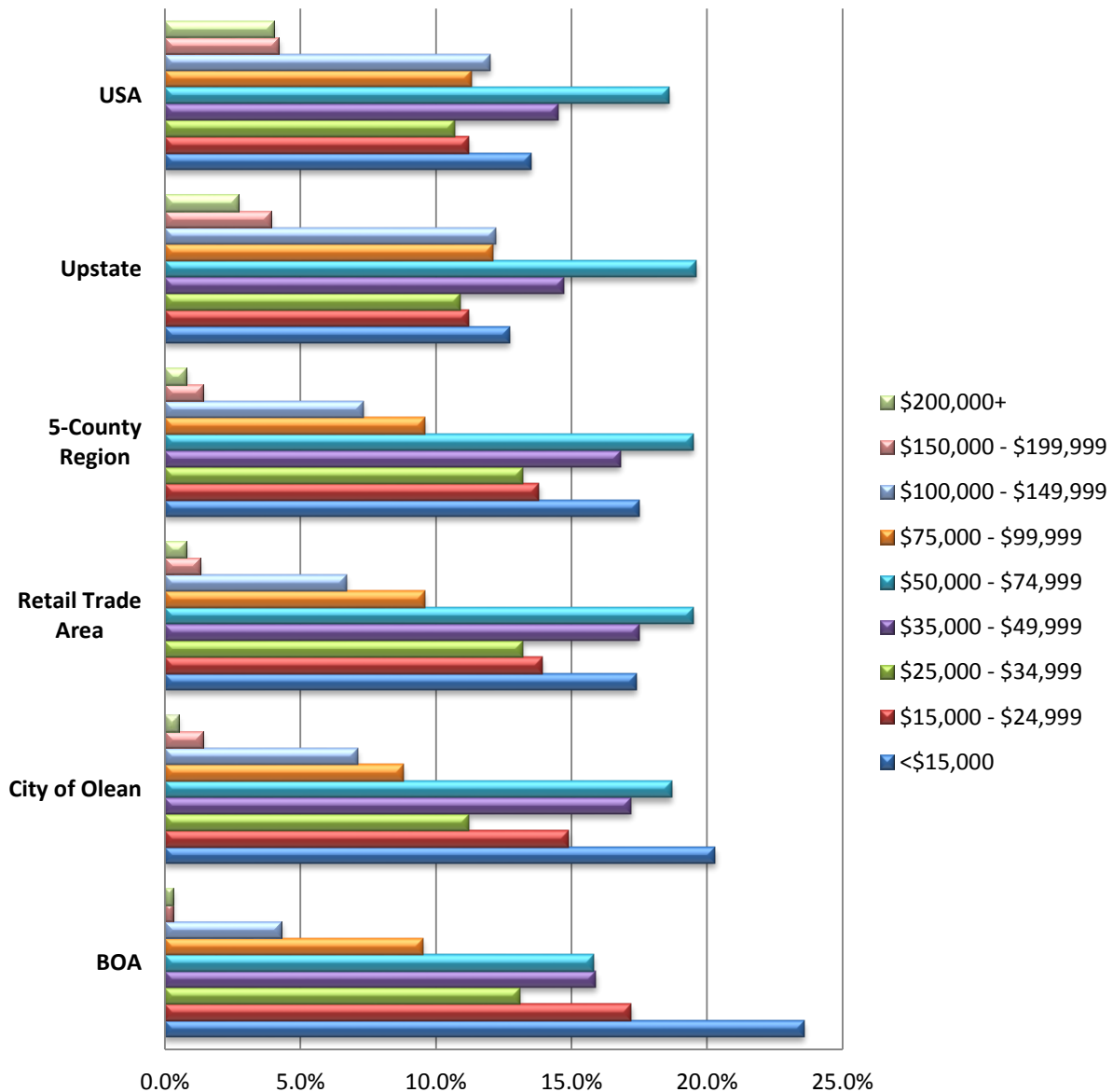
Trends in median household income of the four geographies are summarized in the following table and compared to Upstate New York and the United States. The City of Olean, including the BOA, has seen more income growth since 2000 than the surrounding Trade Area and Five-County Region. Income growth in Upstate New York as a whole outpaced all of the geographies in question. Future projections show that income growth is expected to be comparable across all geographies, although Upstate New York will continue to outpace the western New York geographies.

Median Household Income Trends Comparison		
	% Change 2000 - 2012	% Change 2012 - 2017
BOA	20%	13%
City of Olean	23%	11%
Retail Trade Area	18%	12%
Five-County Economic Region	17%	13%
Upstate New York	26%	14%
United States	19%	13%

Source: ESRI

Distributions of household income in the BOA, the City, Trade Area, Economic Region, Upstate NY and the US are illustrated in the chart below. The BOA has a substantially higher portion of households making less than \$15,000 relative to the other geographies, almost twice the proportion for Upstate New York. The BOA and City of Olean also have higher proportions of households in the \$15,000 - \$24,999 income bracket compared to the larger geographies. Middle- and upper-income households represent a smaller proportion in the BOA than in the City overall, and they are a larger proportion in Upstate New York and the nation than in all four western New York geographies.

Household Income Distribution, 2012



Source: ESRI

GENERAL ECONOMIC OUTLOOK

The General Economic Outlook provides context for discussion of redevelopment scenarios within the BOA by illustrating regional trends that shape the commercial real estate market for the City of Olean and, more specifically, the BOA. In order to identify important issues and opportunities impacting the BOA, employment and industry trends in the Five-County Region were examined.

The EMSI data includes all employment covered by unemployment insurance – only the self-employed, student workers, unpaid family workers, and some agricultural workers are excluded. Unlike the decennial Census, QCEW measures jobs by place of *work*, not place of *residence*, so it is a strong measure of economic activity taking place in a particular region.

Most of the data presented in this report are broken down into industry sectors, organized using the North American Industry Classification System (NAICS). The analysis was performed primarily at the two-digit NAICS code level, which is the highest aggregated level available. A listing of the 2-digit NAICS codes used for this analysis can be found below.

List of 2-Digit NAICS Codes	
NAICS Code	Description
11	Agriculture, Forestry, Fishing and Hunting
21	Mining, Quarrying, and Oil and Gas Extraction
22	Utilities
23	Construction
31-33	Manufacturing
42	Wholesale Trade
44-45	Retail Trade
48-49	Transportation and Warehousing
51	Information
52	Finance and Insurance
53	Real Estate and Rental and Leasing
54	Professional, Scientific, and Technical Services
55	Management of Companies and Enterprises
56	Administrative and Support and Waste Management and Remediation Services
61	Educational Services (Private)
62	Health Care and Social Assistance
71	Arts, Entertainment, and Recreation
72	Accommodation and Food Services
81	Other Services (except Public Administration)
90	Government
99	Unclassified Industry

Employment Growth

The following table summarizes the projected change in the total employment in the Five-County Region, Upstate New York, New York State, and the United States for 2012 through 2022. As shown, compared to Upstate New York, the state as a whole, and the nation, the Region is projected to add jobs at a slower rate. The Region also has lower average wages than the other geographies, with the average worker making almost \$10,000 less than the Upstate average, and nearly \$25,000 less than the state average. With cost of living adjustments the wage gap is likely smaller. However, the growth rate for the Region indicates a stagnant economy.

Employment Growth Summary					
Region	2012	2022	Change	% Change	Avg 2012 Earnings
5-County	158,904	164,645	5,741	3.61%	\$38,800
Upstate NY	3,964,225	4,335,453	371,228	9.36%	\$48,200
New York State	11,430,673	12,750,231	1,319,558	11.54%	\$64,200
United States	179,134,597	202,919,505	23,784,908	13.28%	\$51,100

Source: EMSI

Industry Employment

Existing employment levels and projections by industry sector are evaluated to identify the relative size of industries in an area's economy and any expected change in employment levels within industries. The table below shows projected employment change by industry from 2012 to 2022 and average annual earnings per worker (EPW) for 2012. The industries are listed in order by the anticipated number of jobs gained by 2022.

The largest industry by employment in the Five-County Region is Government, which employs over 28,000 workers. Manufacturing is the next largest employment sector, with over 20,000 workers, followed by Health Care and Social Assistance. Retail Trade is the fourth largest industry. Health Care is projected to add almost 3,000 jobs and overtake manufacturing as the top non-government employment sector over the next 10 years.

The consequences of this change are two-fold: 1) Manufacturing has the highest average wages after the smaller utility industry at nearly \$62,000, while health-related professions pay an average salary of only \$38,000; and 2) Manufacturing is the region's export base, bringing in far more wealth from outside the region than the Health Care industry. It should be noted that the decline in manufacturing jobs is not only due to national trends in those industries; nearly half of the job losses in this field are due to falling regional competitiveness.¹ We note that Olean just recently lost Dal-Tile, a tile manufacturing company that actually started in Olean but decided to consolidate its operations in Gettysburg, PA in 2012. Approximately 175 Olean employees were affected by this plan closure.

Other industry sectors that are expected to experience significant job growth over the next decade include Administrative and Support Professions; Private-Sector Education; and Mining, Quarrying, and Oil & Gas industry jobs, most likely due to the continued development of shale gas reserves in the region. Other industries expected to lose a significant number of jobs include Retail Trade, Agriculture, and Construction.

¹ EMSI Shift Share analysis compares regional employment trends in an industry to national trends.

Five-County Region Projected Employment Change by Industry						
NAICS Code	Description	2012 Jobs	2022 Jobs	Change	% Change	2012 Average Annual Wage
62	Health Care and Social Assistance	18,790	21,767	2,977	16%	\$37,925
56	Administrative and Support and Waste Management and Remediation Services	5,772	7,572	1,800	31%	\$26,586
21	Mining, Quarrying, and Oil and Gas Extraction	5,318	7,012	1,694	32%	\$52,351
61	Educational Services (Private)	6,099	7,124	1,025	17%	\$27,154
52	Finance and Insurance	4,660	5,647	987	21%	\$38,675
53	Real Estate and Rental and Leasing	4,549	5,364	815	18%	\$15,981
81	Other Services (except Public Administration)	8,190	8,803	613	7%	\$18,969
72	Accommodation and Food Services	10,406	10,629	223	2%	\$15,623
42	Wholesale Trade	3,058	3,258	200	7%	\$48,488
71	Arts, Entertainment, and Recreation	2,540	2,660	120	5%	\$12,555
22	Utilities	547	661	114	21%	\$111,330
54	Professional, Scientific, and Technical Services	4,672	4,734	62	1%	\$33,128
48-49	Transportation and Warehousing	3,415	3,406	(9)	0%	\$42,662
99	Unclassified Industry	72	21	(51)	-71%	\$23,792
55	Management of Companies and Enterprises	659	600	(59)	-9%	\$53,614
51	Information	1,714	1,532	(182)	-11%	\$51,612
90	Government	28,195	27,874	(321)	-1%	\$53,932
23	Construction	6,605	6,208	(397)	-6%	\$38,262
11	Agriculture, Forestry, Fishing and Hunting	5,445	4,740	(705)	-13%	\$25,881
44-45	Retail Trade	17,790	17,060	(730)	-4%	\$24,818
31-33	Manufacturing	20,408	17,973	(2,435)	-12%	\$61,901
	Total	158,904	164,645	5,741	4%	\$38,810

Source: EMSI, Camoin Associates

Industry Unemployment

The table below shows total current jobs and unemployment numbers in the Five-County Region as of September 2012, ranked by the number of unemployed workers. The unemployment rate by sector is shown along with each sector's share of the total unemployed population. Some of the sectors with high unemployment rates and numbers include:

- Manufacturing
- Retail Trade
- Accommodation & Food Service
- Construction
- Administrative & Support Services

Unemployment is relatively low in the following industries:

- Government
- Health Care & Social Assistance
- Educational Services
- Mining, Quarrying, and Oil & Gas Extraction
- Finance and Insurance

Five-County Region Unemployment by Industry					
NAICS	Industry	2012 Jobs	Un-employed	% Un-employed	% of Total Unemployed
31-33	Manufacturing	20,408	2,084	9%	16%
99	No Previous Work Experience/Unspecified	72	1,784	96%	14%
44-45	Retail Trade	17,790	1,690	9%	13%
90	Government	28,195	1,382	5%	11%
72	Accommodation and Food Services	10,406	1,207	10%	10%
62	Health Care and Social Assistance	18,790	924	5%	7%
23	Construction	6,605	663	9%	5%
81	Other Services (except Public Administration)	8,190	549	6%	4%
56	Administrative and Support and Waste Management and Remediation Services	5,772	526	8%	4%
61	Educational Services (Private)	6,099	299	5%	2%
21	Mining, Quarrying, and Oil and Gas Extraction	5,318	261	5%	2%
48-49	Transportation and Warehousing	3,415	251	7%	2%
52	Finance and Insurance	4,660	240	5%	2%
71	Arts, Entertainment, and Recreation	2,540	220	8%	2%
54	Professional, Scientific, and Technical Services	4,672	173	4%	1%
42	Wholesale Trade	3,058	145	5%	1%
51	Information	1,714	125	7%	1%
53	Real Estate and Rental and Leasing	4,549	81	2%	1%
11	Agriculture, Forestry, Fishing and Hunting	5,445	33	1%	0%
22	Utilities	547	28	5%	0%
55	Management of Companies and Enterprises	659	5	1%	0%
	Total	158,904	12,670	7%	100%

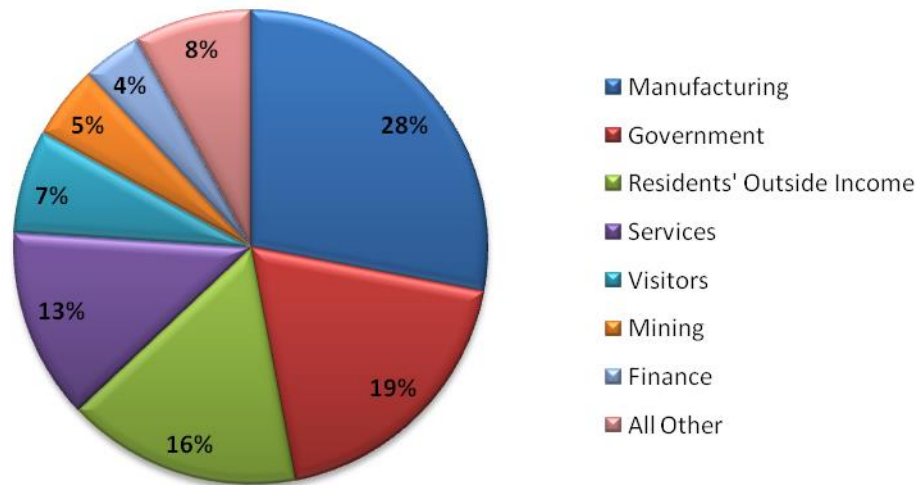
Economic Base

Another way of examining the regional economy is to look at which sectors and industries are responsible for bringing income to the region. Industries generally do this by exporting products and services to purchasers located outside the study region. This approach attempts to show which groups of industries really drive a region's economy; that is, which sectors bring the most dollars into a region, rather than circulating dollars that are already present.

Economic base sectors are groupings of broadly related industries with no claims made about their inter-dependence. In contrast, NAICS sectors are grouped by similar products and production processes. Economic base sectors are created for convenience to describe a broad type of activity that brings money into a region, for example, 'Manufacturing' or 'Visitors.'

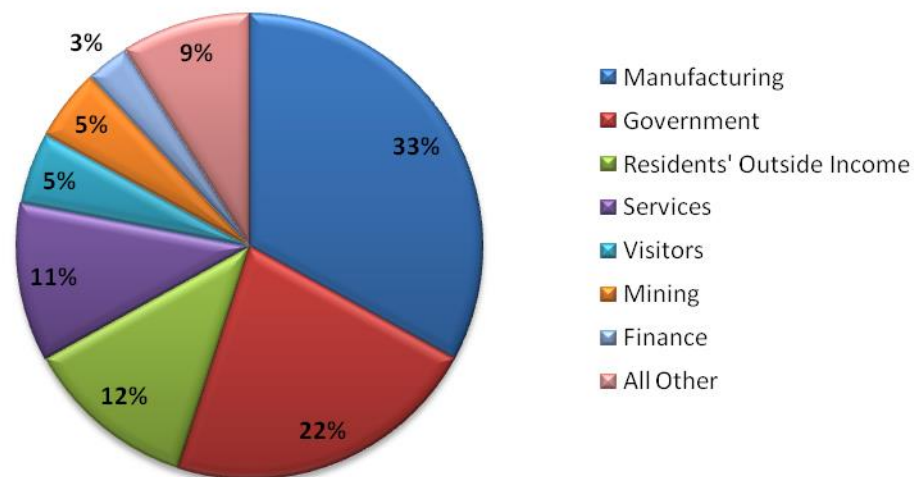
The pie charts below illustrate how much of the Region's jobs and earnings can be attributed to the activities of regional establishments in each sector. Note that the size of each of these sectors depends more on each one's export orientation than on each one's total employment. The top largest economic base sectors by both jobs and earnings are manufacturing, government, residents' outside income, and services. Note that this includes ripple effects; for example, the 33% of earnings that manufacturing supports are more than the wages earned by manufacturing workers. This is because those workers take their earnings home and buy food, clothing, housing, etc., which supports jobs in the industries that supply these goods. Thus, the manufacturing industry is "responsible" for these indirect earnings due to this multiplier effect.

2012 Economic Base - % of Regional Jobs by Sector



Source: EMSI

2012 Economic Base - % of Regional Earnings by Sector



Source: EMSI

Additional detail on the economic base sectors is provided in the following table. Manufacturing is by far the largest generator of earnings for the Region. While only around 20,000 people work directly in manufacturing, the sector generates 44,000 jobs for the Region and one-third of total regional earnings. No other sector comes close. Even though manufacturing jobs are expected to continue declining over the next decade, they will remain a critical source of wealth for the Region and must be preserved to the extent possible. Engine equipment manufacturing (\$105 million), air & gas compressor manufacturing (\$101 million), and fruit & vegetable canning (\$68 million) are the most important manufacturing industries by earnings.

As the second largest economic base sector, government accounts for 19% of jobs and 22% of earnings in the Region. Most of the earnings in this sector go to local school employees, government employees

of all levels, and postal workers. Earnings per worker in this base sector are \$45,000, compared with \$46,000 for the manufacturing sector.

Residents' outside income includes various sources of income from outside the region, which residents in turn spend in the regional economy. Examples of outside income include outside earnings (e.g., income of residents who commute or telecommute to an employer outside the region), capital or property income (investment dividends, royalties, rents), and transfer payments (unemployment benefits, welfare, Social Security payments, etc.). This sector accounts for 16% of the jobs and 12% of the earnings in the Five-County Region.

Services are the fourth largest economic base sector. Industries that drive this sector include colleges, universities, and professional schools, hospitals, and nursing care facilities.

Five-County Region Economic Base					
Sector	Jobs	Earnings(K)	Jobs %	Earnings %	EPW(K)
Manufacturing	44,051	\$2,044,143	28%	33%	\$46
Government	29,666	\$1,344,372	19%	22%	\$45
Residents' Outside Income	24,626	\$732,769	16%	12%	\$30
Services	21,169	\$678,355	13%	11%	\$32
Visitors	11,293	\$278,848	7%	5%	\$25
Mining	7,585	\$335,227	5%	5%	\$44
Finance	5,816	\$204,338	4%	3%	\$35
All Other	3,951	\$172,722	2%	3%	\$44
Exogenous Investment	3,568	\$132,794	2%	2%	\$37
Agriculture	3,399	\$100,864	2%	2%	\$30
Communications	1,937	\$73,869	1%	1%	\$38
Construction	1,772	\$67,048	1%	1%	\$38

Source: EMSI

Import Gap

Looking at the purchasing needs of existing regional industries along with how much of those needs are satisfied from within vs. outside the Region is another way to identify industries that may be a good fit within a region and, consequently, potential development opportunities. For example, businesses and residents in the Region spend about \$351 million on commercial banking, but only \$114 million of that demand is met by banks within the Region, while the remainder is met by banks in other parts of the state and nation. In general, it is desirable to satisfy as many regional purchasing needs as possible through businesses within the Region, because this keeps money circulating in the local economy.

The table below shows 20 industries that have large "import gaps," or industries for which a significant portion of regional demand is met by firms outside the Region. Since not all industries can succeed in any given region, some industries with large import gaps have been excluded. The table includes industries with large import gaps that have an opportunity to expand in the Five-County Region and that might be compatible with portions of the BOA.

Five-County Industry Import Gap				
NAICS Code	Description	\$ Required	\$ Satisfied in Region	Difference (Import Gap)
622110	General Medical and Surgical Hospitals (Private)	\$487,641,050	\$208,671,244	\$278,969,805
522110	Commercial Banking	\$351,694,947	\$114,948,485	\$236,746,462
621111	Offices of Physicians (except Mental Health Specialists)	\$318,503,279	\$86,930,272	\$231,573,007
902612	Colleges, Universities, and Professional Schools (State Government)	\$176,720,727	\$6,473,741	\$170,246,986
517110	Wired Telecommunications Carriers	\$248,773,038	\$117,731,186	\$131,041,852
541110	Offices of Lawyers	\$152,114,073	\$25,417,182	\$126,696,891
722110	Full-Service Restaurants	\$201,905,840	\$89,371,396	\$112,534,443
531210	Offices of Real Estate Agents and Brokers	\$125,115,694	\$24,426,330	\$100,689,364
721110	Hotels (except Casino Hotels) and Motels	\$121,959,741	\$46,253,519	\$75,706,222
722211	Limited-Service Restaurants	\$122,353,788	\$47,253,045	\$75,100,743
238220	Plumbing, Heating, and Air-Conditioning Contractors	\$110,877,618	\$38,667,556	\$72,210,063
238210	Electrical Contractors and Other Wiring Installation Contractors	\$102,008,047	\$29,932,863	\$72,075,184
611310	Colleges, Universities, and Professional Schools (Private)	\$109,893,988	\$38,317,667	\$71,576,321
484121	General Freight Trucking, Long-Distance, Truckload	\$89,266,794	\$20,271,902	\$68,994,892
441110	New Car Dealers	\$106,145,021	\$47,154,089	\$58,990,932
621210	Offices of Dentists	\$73,535,002	\$21,924,780	\$51,610,222
311611	Animal (except Poultry) Slaughtering	\$51,545,515	\$1,858,177	\$49,687,338
213112	Support Activities for Oil and Gas Operations	\$60,410,293	\$19,574,153	\$40,836,140
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$136,397,519	\$96,465,646	\$39,931,873
452910	Warehouse Clubs and Supercenters	\$71,790,699	\$33,255,690	\$38,535,009

Source: EMSI

OFFICE MARKET ANALYSIS

The following table shows projected employment for primary office-utilizing 2-digit industries in the 5-County Economic Region. While finance and insurance and other services industries are expected to grow through 2022, government, information, and management of companies and enterprises industries are expected to decline. Together, these six office-utilizing industries are expected to add 1,100 jobs by 2022 (an increase of about 2.3%).

Projected Employment Change in Office-Utilizing Industries, 5-County Region				
NAICS Code	Description	2012 Jobs	2022 Jobs	Change
52	Finance and Insurance	4,660	5,647	987
81	Other Services (except Public Administration)	8,190	8,803	613
54	Professional, Scientific, and Technical Services	4,672	4,734	62
55	Management of Companies and Enterprises	659	600	(59)
51	Information	1,714	1,532	(182)
90	Government	28,195	27,874	(321)
	Total	48,090	49,190	1,100

Source: EMSI

It is important to note that not every individual in these industries actually works in an office setting or requires office space. For example, the information industry includes telecommunication equipment installers that spend most of their time at customers' sites and require little-to-no formal office space. Additionally, many of the industries not listed above have a few office-occupations (for example: marketing and/or human resource departments for a manufacturing company). Therefore, in addition to examining employment data for office-utilizing industries, data on office-utilizing occupations is assessed.

The following table lists office-utilizing occupations and their expected change from 2012 to 2022 in the 5-County Economic Region. Similar to the industry data, the occupation data demonstrates that over the 10-year time period from 2012 to 2022 the 5-County Economic Region is expected to add about 1,500 office-workers (an increase of about 3.5%).

Current data on office-space vacancy for the 5-County Economic Region were unavailable for this analysis. However, considering the size of the Region and the significant job loss that occurred over the past 10-years,² it is reasonable to assume that there is more than enough vacancy in existing developments throughout the Region to accommodate the projected demand.

Local real estate agents described the office market as "stagnant" and explained that there is not a lot of vacancy in Olean, but there is almost no demand for office space either. Downtown Olean has an overabundance of old office space, the typically rents out for \$8 to \$15 per square foot. The current supply will adequately meet any changes in demand.

² According to EMSI data, the 5-County region lost 7,300 jobs from 2001 to 2012.

Projected Employment Change in Office-Utilizing Occupations, 5-County Region				
SOC	Occupation	2012 Jobs	2022 Jobs	Change
43-4000	Information and Record Clerks	4,311	4,830	519
13-2000	Financial Specialists	2,822	3,300	478
13-1000	Business Operations Specialists	2,419	2,760	341
21-1000	Social Workers, and Other Social Service Specialists	2,488	2,690	202
43-9000	Other Office and Administrative Support Workers	4,031	4,162	131
43-3000	Financial Clerks	3,682	3,802	120
43-6000	Secretaries and Administrative Assistants	3,926	4,043	117
15-1000	Computer Occupations	1,050	1,147	97
11-2000	Marketing, Promotions, Public Relations, & Sales Managers	310	405	95
11-3000	Operations Specialties Managers	957	1,035	78
27-3000	Media and Communication Workers	885	932	47
43-1000	Supervisors of Office and Administrative Support Workers	979	1,023	44
17-1000	Architects, Surveyors, and Cartographers	151	160	9
19-3000	Social Scientists and Related Workers	479	484	5
15-2000	Mathematical Science Occupations	38	40	2
39-5000	Personal Appearance Workers	879	878	(1)
25-4000	Librarians, Curators, and Archivists	391	377	(14)
43-2000	Communications Equipment Operators	138	121	(17)
23-1000	Lawyers, Judges, and Related Workers	623	602	(21)
23-2000	Legal Support Workers	248	210	(38)
17-2000	Engineers	1,147	1,081	(66)
17-3000	Drafters, Engineering Technicians, and Mapping Technicians	691	618	(73)
11-1000	Top Executives	2,399	2,131	(268)
11-9000	Other Management Occupations	7,990	7,685	(305)
Total		43,034	44,516	1,482

Source: EMSI

Office Market Potential

It is not expected that there will be any significant demand for new office space in the coming years. Regarding the BOA, the sole development of office space would not be a lucrative investment; however, some new small-scale office space may be warranted to support other primary uses for the area.

INDUSTRIAL MARKET ANALYSIS

By examining industry and occupational trends of industry sectors that typically occupy industrial and warehouse space, the market analysis seeks to identify growing sectors in the Economic Region and identify ways for Olean to meet any unmet demand.

Over the next 10-years, the change in employment in industrial-space utilizing industries is expected to decline by 436 jobs in the 5-County Economic Region. From an occupational perspective, employment of industrial-space occupations is expected to decline by 354 jobs over the next 10-years, as shown in the tables below.

Projected Employment Change in Industrial-Space Utilizing Industries, 5-County Region				
NAICS Code	Description	2012 Jobs	2022 Jobs	Change
21	Mining, Quarrying, and Oil and Gas Extraction	5,318	7,012	1,694
42	Wholesale Trade	3,058	3,258	200
22	Utilities	547	661	114
48-49	Transportation and Warehousing	3,415	3,406	(9)
31-33	Manufacturing	20,408	17,973	(2,435)
	Total	32,746	32,310	(436)

Source: EMSI

Projected Employment Change in Industrial Space-Utilizing Occupations, 5-County Region				
SOC	Occupation	2012 Jobs	2022 Jobs	Change
51-4000	Metal Workers and Plastic Workers	3,654	3,194	(456)
51-9000	Other Production Occupations	3,116	2,836	(311)
53-7000	Material Moving Workers	2,903	2,594	(252)
53-3000	Motor Vehicle Operators	2,755	2,711	(34)
51-2000	Assemblers and Fabricators	2,726	2,428	(297)
49-9000	Other Installation, Maintenance, and Repair Occupations	1,389	1,558	181
11-9000	Other Management Occupations	1,222	1,303	80
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	1,110	934	(190)
17-2000	Engineers	837	765	(65)
51-1000	Supervisors of Production Workers	782	666	(120)
47-5000	Extraction Workers	697	1,185	553
51-7000	Woodworkers	628	447	(193)
47-1000	Supervisors of Construction and Extraction Workers	513	869	382
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	411	715	319
11-3000	Operations Specialties Managers	378	374	3
37-2000	Building Cleaning and Pest Control Workers	286	358	68
51-8000	Plant and System Operators	180	189	24
51-6000	Textile, Apparel, and Furnishings Workers	166	112	(59)
51-5000	Printing Workers	157	173	18
49-1000	Supervisors of Installation, Maintenance, and Repair Workers	131	125	(5)
	Total	24,041	23,536	(354)

Both the employment and occupation projections for the sectors that primarily occupy industrial space in the Economic Region are projected to decline, suggesting that the demand for industrial space in the Region is weakening. The silver lining for Olean is that the region as a whole lacks ready-to-build sites so if there is industrial development in the region, it will likely be in the BOA. What follows is a profile of the natural gas industry and the potential opportunity for the BOA.

Natural Gas Industry

During the stakeholder interviews, the potential opportunity to meet demand of the growing natural gas industry was mentioned several times. This suggestion is supported by the economic data, which shows the oil and gas extraction industry as the third fastest growing industry at the 2-digit NAICS level over the next 10-years.

Most of this growth has occurred in and around Elmira, NY as gas companies and support businesses have moved into the region. New York State does not currently allow fracking of natural gas; however, the north-central region of Pennsylvania where most of the drilling is happening is significantly lacking in transportation infrastructure so many companies have chosen to locate in New York along the I-86 corridor.

Camoin Associates reached out to George Miner, President of Southern Tier Economic Growth, to gain insight into what the growth of the natural gas industry has meant for Chemung County.

Space Needed

In the last 4-5 years since natural gas fracking began in Pennsylvania, over 30 businesses have moved into Chemung County occupying over 800,000 square feet of space.³ Most of the demand is for old warehouse space with decent access and high overhead doors large enough to pull a tractor-trailer into (often large equipment needing repairs is on the bed of a tractor-trailer). There has been minimal demand for office space by this industry and only two companies actually built new buildings in Chemung County.

Schlumberger was one of the two companies that built new space; they constructed warehouse-type buildings on the foundation of an old Army Depot. This company supplies natural gas drilling sites in Pennsylvania with explosives, fracking chemicals, well encasement material, and other equipment. While it does not actually drill the wells or harness the natural gas, Schlumberger conducts the fracking of the shale, which allows access to the natural gas deposits.

According to Mr. Miner, these natural gas companies and support businesses are not looking for financial assistance or even the cheapest space. They are just looking to lease typically 10,000-30,000 square feet of warehouse, maybe with a few offices. Some of the businesses do use existing rail spurs. Lease rates are typically \$2.25-\$3 per square foot in the Elmira region.

Since fracking is not currently legal in New York State, developers have not tried to meet the demand for warehouse space in NY; however, there has been some limited prospective development south of the border in Pennsylvania. The primary drawback to development is that gas companies and their support businesses will only sign 3-5 year contracts to lease the space, which makes it very difficult to obtain financing.

According to the EMSI data, the transportation and warehousing industry is expected to remain relatively static over the next 10 years, suggesting that if the gas industry continues to grow in New York and now vacant warehouse properties become occupied and are taken off the market, there may eventually be a demand for new construction in the Economic Region. This is highly dependent on whether New York State allows natural gas fracking in the future.

Local Impacts

While these new gas businesses are not hiring many employees from the local workforce⁴, local restaurants, real estate companies, hardware stores, truck dealerships, and other aspects of the service

³ Data compiled by realtor from Cushman & Wakefield/Pyramid Brokerage. 2/13/13

⁴ From interviews, we heard the perception that the local workforce is often “not willing” to work the 12-hour days required by this industry. This perception may change if the industry continues to grow in the region.

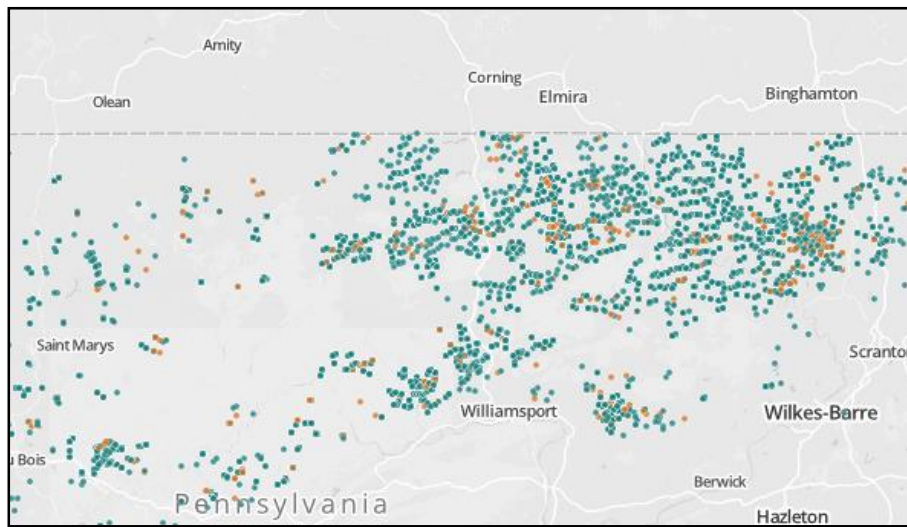
industry in Chemung County have benefited significantly from the growth. Restaurants have adjusted their hours and offerings to cater to this new market. Real estate prices increased significantly, pushing some lower-income residents out of the market. Additionally, three new extended-stay hotel projects are either completed or underway in the County.

There has been some animosity between the community and the new natural gas businesses; both because of the ongoing environmental debate and as a result of the significant changes that have occurred to these formerly “sleepy” areas. College students from local colleges have organized protests in an effort to disrupt business activity. Additionally, since this industry essentially relocates its workforce into the community, some local residents feel “bombarded” by out-of-towners.

Opportunity for Olean?

Unless NY allows fracking, there is not an opportunity for Olean because, as illustrated on the following map, there is not the density of drilling activity south of Olean as there is south of Elmira. If NY were to allow fracking in the future, Olean may be able to capitalize on this opportunity with its existing industrial properties whose size, location, and rail access would be attractive amenities for this industry. However, the City should be aware of and prepare for the socioeconomic changes that come along with this industry - the good and the bad. Mr. Miner suggested that one thing the City can do from a planning perspective is plan for housing; particularly rental properties for the new workforce that would be relocated to the area.

Natural Gas Wells in Pennsylvania



Source: StateImpact Pennsylvania

Industrial Market Potential

Based on the economic data, there does not appear to be a growing market for industrial space in the Economic Region; however, the BOA contains some of the County's only development-ready properties. The industrially-zoned properties in the BOA have been off the market for a period of many years due to environmental concerns, which have since been investigated and are currently being remediated through the Brownfield Cleanup Program. Once they become available, the BOA will contain the most attractive sites for new industrial development in the area given the limited supply of industrial properties available elsewhere in the County. Furthermore, these sites have key advantages above and beyond their availability, namely:

- Superior access to rail transportation,
- Direct and proximate access to I-86 (albeit with certain height restrictions due to the railroad bridge for a portion of those parcels),
- Substantial Brownfield Cleanup Program tax credits that can offset a portion of capital costs,
- Built-in operational support via the Cattaraugus County IDA's generous uniform tax exemption policy for former brownfields,
- Availability of all required infrastructure (water, wastewater, electric, gas, telecommunications),
- Substantial contiguous acreage to accommodate large scale development,
- Access to workforce directly in the City itself.

Considering these factors, almost any new industrial development in the region is likely to occur in the BOA once these parcels come on the market (i.e. post remediation).

Furthermore, if New York State allows hydrofracking techniques to be used within the State to exploit non-conventional sources of natural gas, there would be a significant opportunity for Olean to capitalize on the expected demands of the shale gas industry. Gas companies typically look for existing warehouse space to lease under short-term conditions (3-5 years). As the existing supply of warehouse space becomes occupied, there might be an opportunity for developers to construct new space to meet the demands of businesses coming into the area, particularly for larger companies that have more substantial needs. Other space needs include high bay space with high-clearance doors to allow for machinery to be brought in via tandem trailer for repairs and maintenance. Lay-down space for sand and piping coupled with rail access is a major need for this industry. There is a certain amount of need for space for machinists and other technicians to assemble equipment.

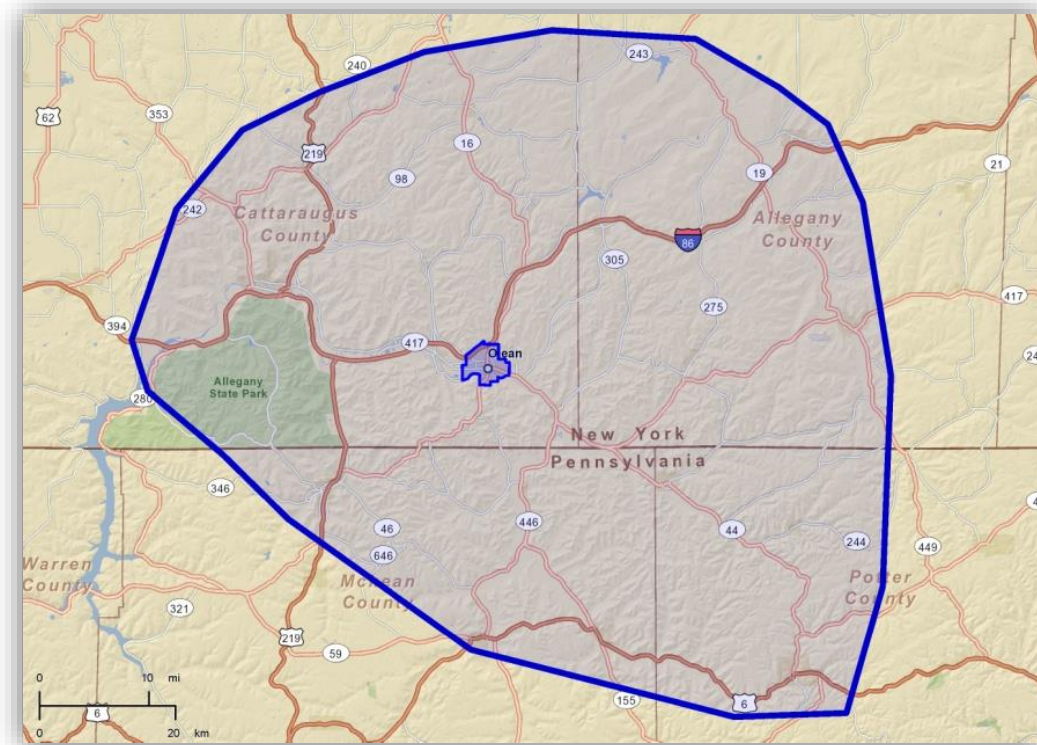
RETAIL MARKET ANALYSIS

The Retail Market Analysis provides some initial insights into the types of retail businesses that might be a good fit for the BOA as local officials begin the process of defining a vision and discussing redevelopment potential for specific sites.

Regional Retail Trade Area

Two retail trade areas have been delineated for this analysis. The first is the Regional Trade Area, which most (roughly 60-75%) of the retail customers of Olean's businesses reside. Since the City of Olean is situated in a very rural region, customers travel significant distances to obtain even basic products. As shown in the map below, the Regional Trade Area covers parts of Cattaraugus County and Allegany County in New York and Potter County and McKean County in Pennsylvania.

Regional Trade Area

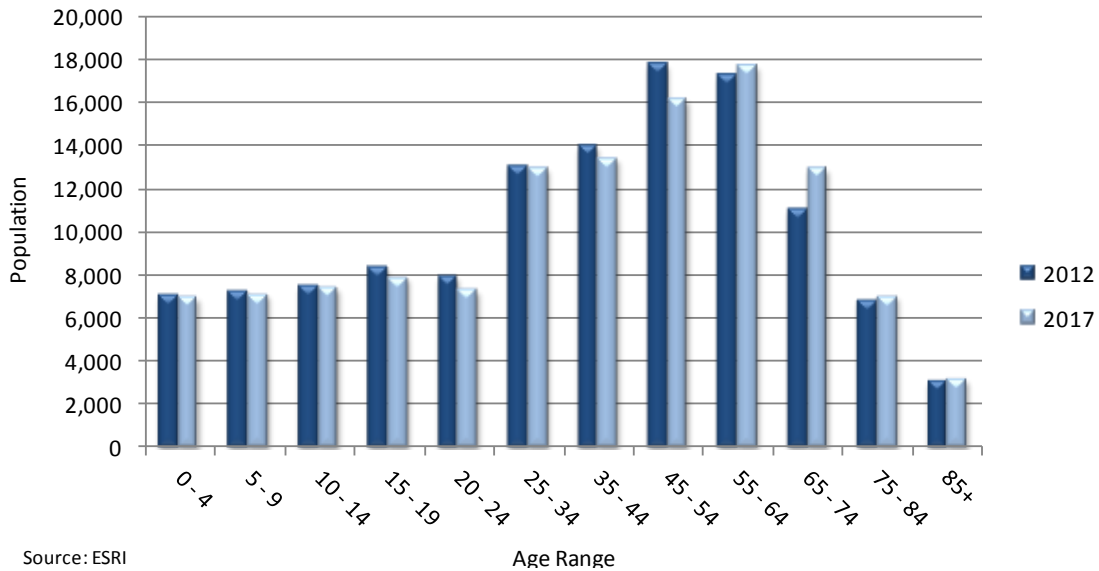


Retail Market Demographics

To begin the retail market analysis, it is essential to have a solid understanding of the demographic and socioeconomic conditions of the consumer population. A distribution of the Regional Retail Trade Area's 2012 population and 2017 projected population is provided in the graph below.

In 2012, the population of the Regional Retail Trade Area was about 121,600. By 2017 the population is expected to decline by about 1,000 residents. The largest population segment in the Regional Retail Trade Area in 2012 was the 45-54 year old group (note that some of the ranges shown below are 5-year ranges, others are 10-year ranges), which had a population of almost 18,000. This age-segment is expected to decrease through 2017 to about 16,000 while the 55-64 age range is expected to increase to just under 18,000. The age range expected to experience the greatest increase is the 65-74 age range. The 0-19 year old population is expected to remain relatively stable from 2012 to 2017, experiencing only a modest decline.

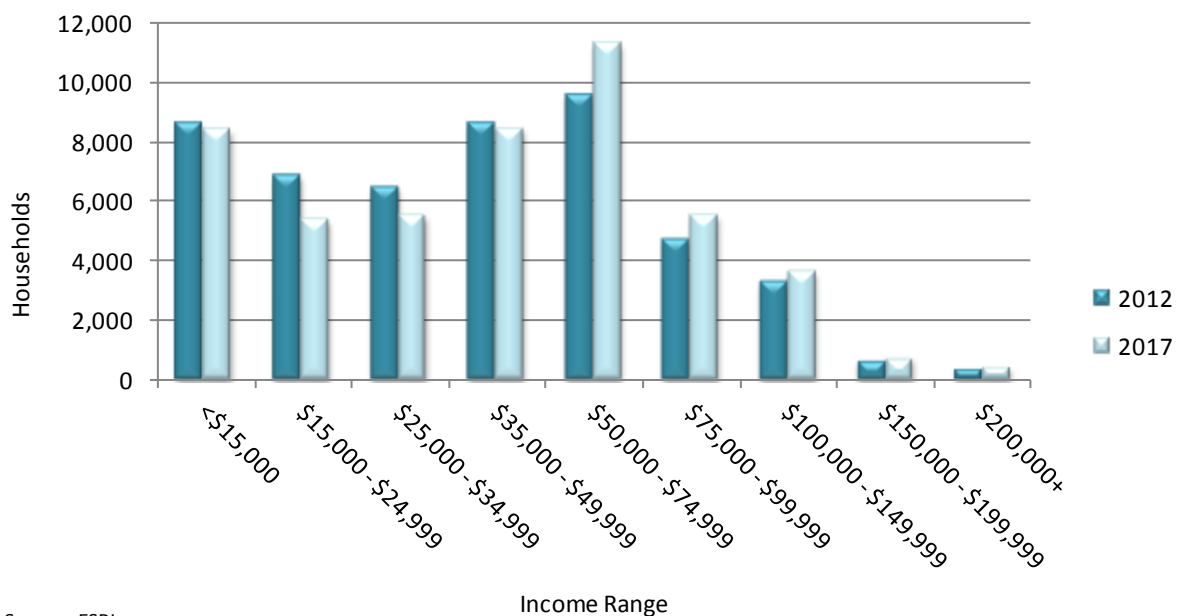
Population Distribution: Regional Trade Area



The median household income in the Regional Trade Area in 2012 was \$38,565 and expected to reach \$43,352 by 2017. Household income distribution for 2012 and 2017 projections in the Regional Retail Trade Area is illustrated in the following chart. Overall, household income is expected to increase through 2017. Currently, the largest household income bracket is the \$50,000-\$74,999 range (about 9,600 households). This income range is expected to increase through 2017 to over 11,300 households.

As household income of the Regional Retail Trade Area increases in the coming years, the distribution is expected to shift upward with the \$50,000-\$74,999 bracket remaining the largest. All income ranges below \$50,000 are expected to decline in the number of households and all of those above \$74,999 are expected to add households.

Household Income Distribution: Regional Trade Area



Market Segmentation

In addition to basic demographic data analysis, another useful tool in determining the characteristics of a particular trade area is market segmentation, which is defined as the classification of consumers according to demographic, socioeconomic, housing, and lifestyle characteristics. Market segmentation is based on the concept that people with similar demographic characteristics, purchasing habits, and media preferences naturally gravitate toward each other and into the communities in which they live. Businesses utilize market segmentation analysis to identify their best markets, measure the potential demand for new products or services, and reach their markets more effectively. Market segmentation data for the Regional Retail Trade Area were obtained from ESRI's 'Community Tapestry' segmentation model.

It is important to recognize that the classifications and labels for defined market segments are generalizations. The data and descriptions of each segment are based on comparisons with the U.S. as a whole and reflect the propensity of households within that segment to exhibit certain demographic, lifestyle, and consumer characteristics relative to the overall population. Nevertheless, market segmentation analysis can provide a useful perspective in understanding existing and potential customers residing within a defined area.

The following table shows the five largest tapestry segments as identified by ESRI in the Regional Retail Trade Area, followed by a brief description of each segment's preferences (descriptions provided by ESRI). As shown, these five tapestry segments make up over 60% of the Regional Retail Trade Area Market.

Regional Retail Trade Area Market Segmentation						
Market Segment	Number of Households	Percent of Households	Median Age	Household Income	Median Net Worth	Median Home Value
Rooted Rural	9,579	19.4%	42.6	\$37,952	\$60,202	\$95,084
Heartland Communities	7,357	14.9%	42.8	\$35,160	\$46,091	\$78,489
Rustbelt Retirees	5,481	11.1%	45.6	\$52,216	\$130,866	\$119,104
Salt of the Earth	4,740	9.6%	41.8	\$50,406	\$104,721	\$124,189
Rustbelt Traditions	3,654	7.4%	36.7	\$51,387	\$82,469	\$94,969
Total	30,811	62.4%	-	-	-	-

Source: ESRI

Rooted Rural (19.4%): Married-couple families dominate these rural neighborhoods. Big do-it-yourselfers, these residents take pride in their homes and keep busy with home improvement and remodeling projects. They are also proud of their gardens, making frequent purchases of insecticides, flower and vegetable seeds, and plants. It is common for these residents to own lawn or garden tractors and ATVs as well as an assortment of tools. They prefer domestic vehicles and most households own or lease a truck. Typically, a household member handles vehicle maintenance. When families go out to eat they prefer chain steakhouses, but generally have meals at home prepared with fresh vegetables from the garden. Many homes own a separate freezer to store produce. They shop for most supplies and groceries at a Wal-Mart Supercenter. For recreation they hunt, fish, ride bike, attend country music concerts, and go to car races.

Heartland Communities (14.9%): About half of these residents are retired and most households are married-couples. These residents invest their time and money into their cherished communities and homes. They take pride in their gardening skills; many homes own a riding lawn mower. Residents tackle home improvement projects such as exterior painting or plumbing and shop at Ace Hardware or Lowe's. Many residents enjoy ordering from QVC or Avon sales representatives as well as shop at Wal-Mart and Kmart. Heartland Community residents have a distinctly country lifestyle. They hunt, fish, listen to

country music, and enjoy auto racing. Reading Sunday newspapers is important to them and many join fraternal orders or religious clubs.

Rustbelt Retirees (11.1%): Most of the households in these neighborhoods are married couples with no children in the house or singles who live alone. These hardworking folks are settled, many living in the same household for years. They tend to be politically conservative and loyal to their communities and many participate in public activities and fund-raising, visit elected officials, and work for political candidates. They buy home furnishings and work on remodeling projects to update their houses. Rustbelt Retirees use coupons and look for bargains at discount stores. They enjoy occasionally eating out at family restaurants such as Friendly's and watch rented movies instead of going to the theater. They also go bowling, play cards, and enjoy going to casinos.

Salt of the Earth (9.6%): About 65% of these households are married couples with and without children, 20% of households are singles who live alone. Settled, traditional, hardworking, and self-reliant describes these residents. They tackle small home improvement and remodeling projects. They spend money and time on their gardens and own the tools necessary to handle these chores. Over a quarter of these households own three or more vehicles, typically including a truck and many own motorcycles. Many families own two or more pets. They eat out at family restaurants such as Bob Evans farms or Cracker Barrel. They often bake at home as well as go fishing, hunting, target shooting, and boating. They work out on indoor exercise equipment such as stationary bikes and treadmills.

Rustbelt Traditions (7.4%): These neighborhoods are primarily a mix of married-couples families, single, parents, and singles that live alone. These residents stick close to home and have shopped, lived, worked, and played in the same area. Not tempted by fads, they stick to familiar products and services. They spend money on their families, yard maintenance, and home improvements. They will hire contractors for special projects such as the installation of roofing, carpet, and flooring. They are financially conservative and shop for bargains at Sam's Club, JCPenny, and Kmart as well as online. For recreation they go bowling, fishing, and hunting and attend car races, country music shows, and ice hockey games. They are big TV fans, enjoying game shows and the Disney Channel.

Retail Leakage/Surplus Analysis

The table below shows existing retail sales ("supply") in the Regional Retail Trade Area compared to retail potential ("demand"). Supply is calculated by summing all product sales reported for an area by local businesses. Demand is calculated by estimating total purchases by local residents of various categories of goods. The difference between the retail sales demand and supply is referred to as the retail gap.

The demand for goods and services that is not being met locally is referred to as sales leakage, shown in the following table as a positive retail gap. The leakage occurs because consumers make purchases at establishments located outside the defined trade area. For example, there were approximately \$6.8 million of retail sales in the Clothing Stores category in the Regional Retail Trade Area. However, residents of the Trade Area spent approximately \$24.3 million on these goods. Therefore, residents spent about \$17.4 million outside of the Retail Trade Area; such spending is considered sales leakage. In this region, most of this leakage goes to Buffalo, which is about an hour and a half north of Olean.

Sales leakage is normally viewed as an opportunity to capture unmet demand in a trade area by opening new or expanding existing businesses. However, not all retail categories that exhibit leakage within a particular trade area are a good fit for that region. The 4-digit NAICS industry groups experiencing the most sales leakage from the Regional Retail Trade Area include:

- Automobile dealers
- Full-service restaurants

- Electronics and appliance stores
- Clothing stores
- Health and personal care stores

The retail potential for additional stores within the BOA is analyzed later in this report and identifies which industries have enough sales leakage to potentially support additional retail outlets.

Conversely, if the supply of goods sold exceeds trade area demand, it is assumed that non-residents are coming into the trade area to spend money, creating a sales surplus. A sales surplus is shown as a negative retail gap in the following table. There are two likely reasons a sales surplus condition would exist. First, a cluster of competing businesses offering a similar good or product may be located within the trade area, creating a specialty cluster that draws in spending by households from outside the trade area. Secondly, a sales surplus may indicate a saturated retail market, where supply exceeds demand. Industries in the Regional Retail Trade Area that have a large sales surplus compared to their total sales include:

- Gasoline stations
- Other general merchandise stores
- Grocery stores
- Department stores
- Home furnishing stores

As mentioned above, industry sectors with leakage can be good markets to pursue in that residents are currently going outside of the trade area to make purchases. A new business or an expansion by an existing business could potentially capture some of the spending by those residents. Alternatively, an industry with a surplus could indicate a niche market that the trade area could build on and create an identity around.

Regional Retail Trade Area Sales Surplus & Leakage					
NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Number of Businesses
441	Motor Vehicle & Parts Dealers	\$191,669,970	\$115,063,518	\$76,606,451	108
4411	Automobile Dealers	\$161,224,044	\$93,462,633	\$67,761,411	51
4412	Other Motor Vehicle Dealers	\$17,565,229	\$8,536,203	\$9,029,026	20
4413	Auto Parts, Accessories & Tire Stores	\$12,880,698	\$13,064,682	-\$183,985	36
442	Furniture & Home Furnishings Stores	\$21,974,124	\$31,765,037	-\$9,790,913	47
4421	Furniture Stores	\$11,058,385	\$12,625,891	-\$1,567,507	21
4422	Home Furnishings Stores	\$10,915,739	\$19,139,146	-\$8,223,406	26
4431	Electronics & Appliance Stores	\$23,138,086	\$5,935,807	\$17,202,279	28
444	Bldg Materials, Garden Equip. & Supply Stores	\$32,293,136	\$32,840,210	-\$547,075	79
4441	Bldg Material & Supplies Dealers	\$28,903,490	\$31,115,234	-\$2,211,744	63
4442	Lawn & Garden Equip & Supply Stores	\$3,389,646	\$1,724,977	\$1,664,669	16
445	Food & Beverage Stores	\$159,493,648	\$177,156,938	-\$17,663,290	80
4451	Grocery Stores	\$146,667,539	\$167,300,602	-\$20,633,063	51
4452	Specialty Food Stores	\$5,203,577	\$3,975,797	\$1,227,781	14
4453	Beer, Wine & Liquor Stores	\$7,622,531	\$5,880,539	\$1,741,992	15
446,4461	Health & Personal Care Stores	\$41,048,605	\$27,959,907	\$13,088,698	55
447,4471	Gasoline Stations	\$158,735,588	\$199,133,638	-\$40,398,050	48
448	Clothing & Clothing Accessories Stores	\$24,299,563	\$6,837,192	\$17,462,371	46
4481	Clothing Stores	\$18,498,072	\$4,288,684	\$14,209,388	26
4482	Shoe Stores	\$2,634,641	\$1,229,962	\$1,404,679	5
4483	Jewelry, Luggage & Leather Goods Stores	\$3,166,851	\$1,318,546	\$1,848,304	15
451	Sporting Goods, Hobby, Book & Music Stores	\$10,083,981	\$8,802,249	\$1,281,732	67
4511	Sporting Goods/Hobby/Musical Instr Stores	\$8,353,867	\$7,482,720	\$871,148	60
4512	Book, Periodical & Music Stores	\$1,730,114	\$1,319,529	\$410,584	7
452	General Merchandise Stores	\$118,676,100	\$158,738,719	-\$40,062,619	44
4521	Department Stores Excluding Leased Depts.	\$38,597,587	\$54,622,005	-\$16,024,418	11
4529	Other General Merchandise Stores	\$80,078,513	\$104,116,714	-\$24,038,201	33
453	Miscellaneous Store Retailers	\$19,482,249	\$18,621,217	\$861,032	151
4531	Florists	\$1,219,573	\$531,769	\$687,804	13
4532	Office Supplies, Stationery & Gift Stores	\$5,979,589	\$2,657,441	\$3,322,148	34
4533	Used Merchandise Stores	\$2,445,385	\$1,379,163	\$1,066,221	29
4539	Other Miscellaneous Store Retailers	\$9,837,702	\$14,052,843	-\$4,215,142	74
454	Nonstore Retailers	\$20,486,150	\$17,176,306	\$3,309,844	11
4541	Electronic Shopping & Mail-Order Houses	\$4,026,471	\$1,852,116	\$2,174,355	1
4542	Vending Machine Operators	\$4,870,340	\$2,770,300	\$2,100,040	3
4543	Direct Selling Establishments	\$11,589,340	\$12,553,890	-\$964,550	7
722	Food Services & Drinking Places	\$120,190,342	\$87,429,541	\$32,760,801	304
7221	Full-Service Restaurants	\$58,611,995	\$39,766,433	\$18,845,562	174
7222	Limited-Service Eating Places	\$51,281,331	\$40,855,373	\$10,425,958	78
7223	Special Food Services	\$6,026,704	\$3,867,928	\$2,158,777	9
7224	Drinking Places - Alcoholic Beverages	\$4,270,312	\$2,939,808	\$1,330,504	42

Source: ESRI

Retail Use Feasibility

This analysis will help the City of Olean to target businesses that will be successful by capturing a large enough portion of the current sales leakage to be profitable. While the table in the previous section identifies a number of industry sectors that are experiencing leakage, it does not necessarily mean that new businesses locating in the area would be successful. The following section identifies which of the industries with leakage may have enough sales to warrant opening a new store or expanding existing stores. The analysis assumes that 25% of the existing leakage in each category can potentially be recaptured by new businesses. The actual recapture rate for each category will vary and depends on existing amenities, commuting patterns, and consumer affinity towards certain stores or brands.

The table below identifies the industries that are experiencing sales leakage from the Regional Retail Trade Area and the number of new businesses that could be theoretically supported in each category if 25% of the sales leakage is recaptured and the new businesses have similar annual sales as the Upstate New York average for stores in each category.

Regional Retail Trade Area Opportunities					
NAICS	Industry Group	Retail Gap	25% Recapture	Average Sales per Business in Upstate NY	# of Potential Businesses
4411	Automobile Dealers	\$67,761,411	\$16,940,353	\$4,113,929	4.1
4412	Other Motor Vehicle Dealers	\$9,029,026	\$2,257,256	\$782,278	2.9
4431	Electronics & Appliance Stores	\$17,202,279	\$4,300,570	\$432,258	9.9
4442	Lawn & Garden Equip & Supply Stores	\$1,664,669	\$416,167	\$194,024	2.1
4452	Specialty Food Stores	\$1,227,781	\$306,945	\$434,792	0.7
4453	Beer, Wine & Liquor Stores	\$1,741,992	\$435,498	\$773,830	0.6
446,4461	Health & Personal Care Stores	\$13,088,698	\$3,272,175	\$711,067	4.6
4481	Clothing Stores	\$14,209,388	\$3,552,347	\$378,768	9.4
4482	Shoe Stores	\$1,404,679	\$351,170	\$268,745	1.3
4483	Jewelry, Luggage & Leather Goods Stores	\$1,848,304	\$462,076	\$131,375	3.5
4511	Sporting Goods/Hobby/Musical Instr Stores	\$871,148	\$217,787	\$146,559	1.5
4512	Book, Periodical & Music Stores	\$410,584	\$102,646	\$294,798	0.3
4531	Florists	\$687,804	\$171,951	\$153,264	1.1
4532	Office Supplies, Stationery & Gift Stores	\$3,322,148	\$830,537	\$159,640	5.2
4533	Used Merchandise Stores	\$1,066,221	\$266,555	\$66,992	4.0
4541	Electronic Shopping & Mail-Order Houses	\$2,174,355	\$543,589	\$5,055,823	0.1
4542	Vending Machine Operators	\$2,100,040	\$525,010	\$1,019,834	0.5
7221	Full-Service Restaurants	\$18,845,562	\$4,711,390	\$305,708	15.4
7222	Limited-Service Eating Places	\$10,425,958	\$2,606,489	\$714,674	3.6
7223	Special Food Services	\$2,158,777	\$539,694	\$828,308	0.7
7224	Drinking Places - Alcoholic Beverages	\$1,330,504	\$332,626	\$109,014	3.1

Source: ESRI, Camion Associates

Legend:

25% Recapture Rate: Equals 25% of the Retail Gap

of Potential Businesses: Potential recapture divided by Upstate Average Sales

Based on the analysis of sales leakage, it appears that there is significant demand in the Regional Retail Trade Area for Full-Service Restaurants. This was mentioned time and time again by the various individuals interviewed for this study. Most seemed to feel that national chain, family-style restaurants such as Chilies, Tully's, TGI Friday's, Ruby Tuesday, Olive Garden, Panera Bread etc. would do very well in Olean. One interviewee explained that Olean has a history of having some very good eating establishments and was once the go-to area for dining out, but consumer tastes changed and many of the restaurants didn't adapt and are no longer in the area. They have not been replaced to meet this consumer market.

This restaurant sector is growing across the U.S. as well, restaurant concepts alone (for national chain stores) account for over 42% of planned retail growth in 2013. Growth leaders include limited-service eating places: Subway, Five Guys, Chipotle, Panera Bread, etc.⁵

Another industry that has strong potential according to the data is Electronic & Appliance Stores, which is a broad retail sector consisting of everything from cell phones to refrigerators. While some of this leakage may be going to online sales, there may be an opportunity to re-capture some of it if a significant amount of leakage is occurring in a specific sector (large appliances, for example).

Clothing Stores is another sector showing significant sales leakage from the Regional Trade Area that was also mentioned during stakeholder discussions; particularly women's clothing.

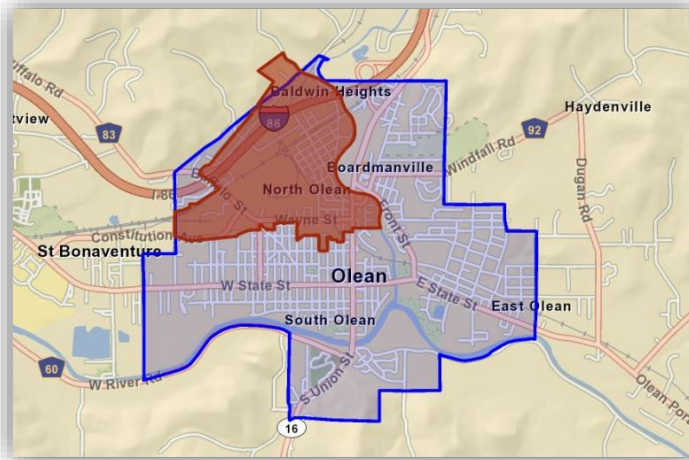
Additionally, the data suggests that there is modest demand for Office Supplies, Stationary, & Gift Stores, Health & Personal Care Stores (pharmacies), Automobile Dealers, and Used Merchandise Stores.

⁵ U.S. National Retail Report, Chainlinks Retail Advisors: <http://www.ctbt.com/Web/Download-Research-File.aspx?id=6772A9C9-09B2-4C0B-8135-BD2E09E29033>.

City Retail Trade Area

The second retail trade area is a local trade area and is defined as the City boundary (see map below). By analyzing the City Retail Trade Area we answer the question: “What type of services/goods, if any, do Olean residents leave the City to purchase?” In other words, this analysis identifies any unmet local demand by City residents.

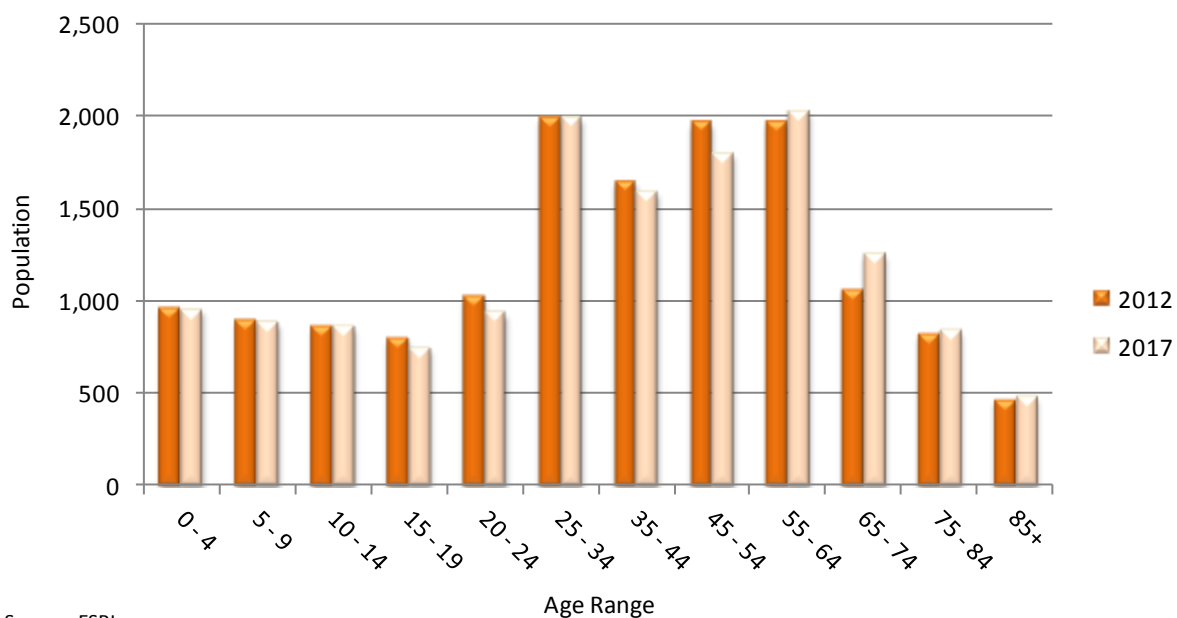
City Retail Trade Area (Blue) with BOA Boundary (Red)



Retail Market Demographics

In 2012 the City's population was 1,906. Most of this population was concentrated in the 25-64 year old age range (over 50%). Just under a quarter of the population was under the age of 19 and about 16% of the population was over 65 years old. Through 2017, the City's population is expected to age with the 65-74 year age range projected to experience the greatest increase. Overall, the City's population is expected to remain relatively stable with only a small decline of about 20 residents from 2012 to 2017.

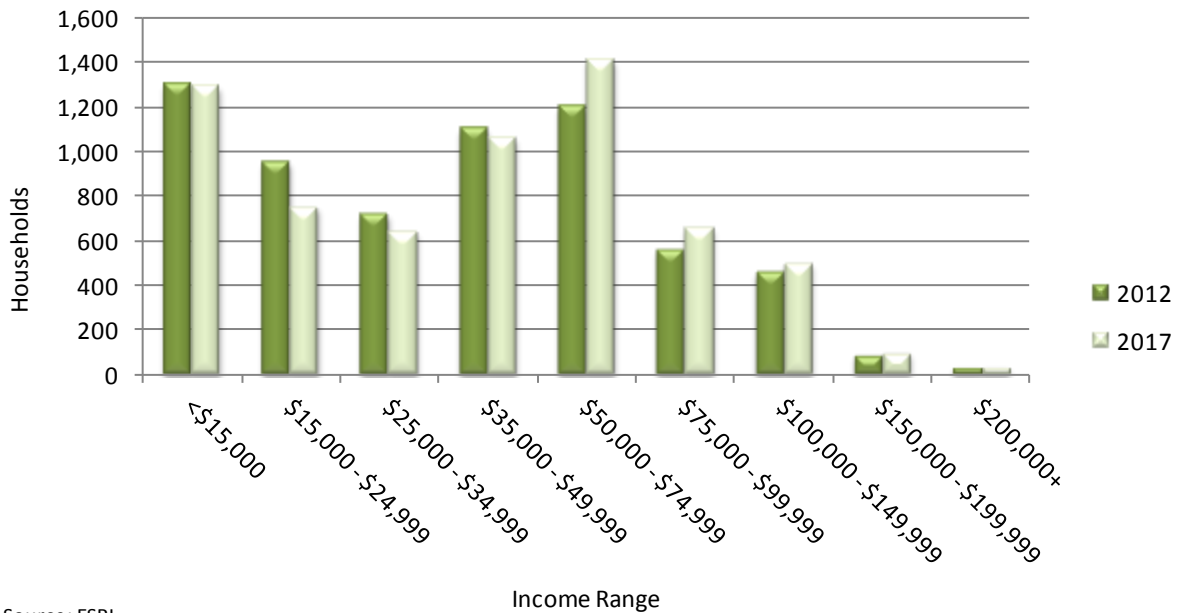
Population Distribution: City Trade Area



Source: ESRI

In 2012, over 20% of the City's households had a household income of less than \$15,000 annually. The second largest household income bracket was the \$50,000 - \$74,999 range, which had about 1,200 households (19%). As household income increases through 2017, this income bracket is expected to experience the largest increase, reaching over 1,400 households.

Household Income Distribution: City Trade Area



Source: ESRI

Market Segmentation

The five largest tapestry segments as identified by ESRI in the City Retail Trade Area are summarized in the table below, followed by a brief description of each segment's preferences (descriptions provided by ESRI). As shown, these five tapestry segments make up over 94% of the City Trade Area, which suggests that there is little diversity in consumer preferences in the City's market.

City Retail Trade Area Market Segmentation						
Market Segment	Number of Households	Percent of Households	Median Age	Household Income	Median Net Worth	Median Home Value
Simple Living	1,550	24.1%	41.3	\$29,408	\$15,034	\$96,358
Great Expectations	1,511	23.5%	33.3	\$40,243	\$21,548	\$100,315
Rustbelt Traditions	1,408	21.9%	36.7	\$51,378	\$82,469	\$94,696
Rustbelt Retirees	1,087	16.9%	45.6	\$52,216	\$130,866	\$119,104
Prosperous Empty Nesters	502	7.8%	48.9	\$67,295	\$261,595	\$193,784
Total	6,058	94.2%	-	-	-	-

Source: ESRI

Simple Living (24.1%): Half of these households are singles that live alone or share housing, 32% are married-couple families. The lifestyle of these residents is reflected by their ages; younger people go to nightclubs and play musical instruments; seniors refinish furniture and go fishing. Community activities are also important to the latter; they join fraternal orders and veterans' clubs. Simple Living households spend wisely on a restricted budget. They buy the essentials at discount stores and occasionally treat themselves to dinner out and a movie. Cable TV is a must for these frequent viewers of family programs, news programs, and game shows. They are big fans of daytime TV. Owning a personal computer, cell phone, or DVD isn't important.

Great Expectations (23.5%): Young singles who live alone and married-couple families dominate this market segment. Homeowners in this group are not afraid to tackle smaller maintenance and remodeling projects, but they also enjoy a young active lifestyle. They go out to dinner and to movies. They do most of their grocery shopping at Wal-Mart Supercenters and Aldi. They throw Frisbees; play softball and pool; go canoeing; watching horror, science fiction, and drama films on DVD; and listen to country music, classic rock, and sports on the radio. They occasionally eat at Arby's and Dairy Queen and shop at major discount and department stores. They rarely travel. Focused on starting their careers, they're not investing for retirement yet.

Rustbelt Traditions (21.9%): These neighborhoods are primarily a mix of married-couples families, single, parents, and singles that live alone. These residents stick close to home and have shopped, lived, worked, and played in the same area. Not tempted by fads, they stick to familiar products and services. They spend money on their families, yard maintenance, and home improvements. They will hire contractors for special projects such as the installation of roofing, carpet, and flooring. They are financially conservative and shop for bargains at Sam's Club, JCPenny, and Kmart as well as online. For recreation they go bowling, fishing, and hunting and attend car races, country music shows, and ice hockey games. They are big TV fans, enjoying game shows and the Disney Channel. *(Note: This market segment was also a top market segment in the Regional Retail Trade Area.)*

Rustbelt Retirees (16.9%): Most of the households in these neighborhoods are married couples with no children in the house or singles who live alone. These hardworking folks are settled, many living in the same household for years. They tend to be politically conservative and loyal to their communities and many participate in public activities and fund-raising, visit elected officials, and work for political candidates. They buy home furnishings and work on remodeling projects to update their houses. Rustbelt Retirees use coupons and look for bargains at discount stores. They enjoy occasionally eating out at family restaurants such as Friendly's and watch rented movies instead of going to the theater. They also go bowling, play cards, and enjoy going to casinos. *(Note: This market segment was also a top market segment in the Regional Retail Trade Area.)*

Prosperous Empty Nesters (7.8%): Forty percent of the households in this market segment are composed of married couples with no children living at home and these residents are enjoying the transition from child-rearing to retirement. These residents exercise regularly and take a multitude of vitamins. The refinish furniture and play golf. They also attend golf tournaments and sports events, particularly baseball games and college football games. They order by phone from catalogs and use coupons. Households are likely to own at least one luxury car. They travel extensively in the U.S. and abroad. They read biographies, mysteries, and history books; two or more daily newspapers; and business or fitness magazines. Residents will join a civic club or charitable organizations; help with fund-raising; write to a radio station or newspaper editor; and volunteer.

Retail Leakage/Surplus Analysis

Retail sales at City businesses and retail demand by City residents are summarized in the table on the next page. Overall, most retail industry categories are experiencing a sales surplus meaning that local demand is being met and these businesses are attracting customers from outside the City. Retail industries at the 4-digit NAICS code level experiencing the greatest sales surplus include:

- Grocery stores
- Gasoline stations
- Other general merchandise stores
- Health and personal care stores
- Limited service eating places

City residents do look outside the City for certain purchases, particularly for automotive-related products and electronics. Industries experiencing the greatest sales leakage out of the City Retail Trade Area include:

- Department stores
- Electronic and appliance stores
- Other motor vehicle dealers
- Automotive dealers
- Direct selling establishments

NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Number of Businesses
441	Motor Vehicle & Parts Dealers	\$22,579,877	\$20,402,758	\$2,177,119	7
4411	Automobile Dealers	\$19,243,675	\$17,921,883	\$1,321,792	3
4412	Other Motor Vehicle Dealers	\$1,660,808	\$0	\$1,660,808	0
4413	Auto Parts, Accessories & Tire Stores	\$1,675,394	\$2,480,875	-\$805,481	4
442	Furniture & Home Furnishings Stores	\$2,896,409	\$6,241,672	-\$3,345,263	8
4421	Furniture Stores	\$1,883,429	\$5,893,577	-\$4,010,148	6
4422	Home Furnishings Stores	\$1,012,980	\$348,095	\$664,885	2
4431	Electronics & Appliance Stores	\$2,556,191	\$361,970	\$2,194,221	2
444	Bldg Materials, Garden Equip. & Supply Stores	\$3,784,975	\$3,691,750	\$93,225	15
4441	Bldg Material & Supplies Dealers	\$3,292,718	\$3,664,227	-\$371,509	14
4442	Lawn & Garden Equip & Supply Stores	\$492,257	\$27,523	\$464,734	1
445	Food & Beverage Stores	\$19,250,829	\$66,964,483	-\$47,713,654	9
4451	Grocery Stores	\$17,461,377	\$66,264,241	-\$48,802,864	7
4452	Specialty Food Stores	\$953,379	\$0	\$953,379	0
4453	Beer, Wine & Liquor Stores	\$836,073	\$700,242	\$135,831	2
446,4461	Health & Personal Care Stores	\$4,735,729	\$10,957,905	-\$6,222,176	13
447,4471	Gasoline Stations	\$18,335,172	\$33,255,026	-\$14,919,854	7
448	Clothing & Clothing Accessories Stores	\$2,103,328	\$1,884,089	\$219,239	11
4481	Clothing Stores	\$1,418,915	\$1,036,608	\$382,307	6
4482	Shoe Stores	\$350,044	\$423,546	-\$73,502	1
4483	Jewelry, Luggage & Leather Goods Stores	\$334,369	\$423,935	-\$89,566	4
451	Sporting Goods, Hobby, Book & Music Stores	\$1,288,489	\$1,886,638	-\$598,149	14
4511	Sporting Goods/Hobby/Musical Instr Stores	\$976,522	\$810,388	\$166,134	10
4512	Book, Periodical & Music Stores	\$311,967	\$1,076,250	-\$764,283	4
452	General Merchandise Stores	\$16,930,997	\$20,343,819	-\$3,412,822	7
4521	Department Stores Excluding Leased Depts.	\$7,457,153	\$4,406,782	\$3,050,371	3
4529	Other General Merchandise Stores	\$9,473,844	\$15,937,037	-\$6,463,193	4
453	Miscellaneous Store Retailers	\$2,493,819	\$2,585,731	-\$91,912	19
4531	Florists	\$94,031	\$92,069	\$1,962	1
4532	Office Supplies, Stationery & Gift Stores	\$567,651	\$909,770	-\$342,119	4
4533	Used Merchandise Stores	\$142,522	\$257,820	-\$115,298	5
4539	Other Miscellaneous Store Retailers	\$1,689,615	\$1,326,072	\$363,543	9
454	Nonstore Retailers	\$3,587,468	\$1,433,187	\$2,154,281	2
4541	Electronic Shopping & Mail-Order Houses	\$1,157,097	\$0	\$1,157,097	0
4542	Vending Machine Operators	\$987,009	\$1,186,367	-\$199,358	1
4543	Direct Selling Establishments	\$1,443,362	\$246,820	\$1,196,542	1
722	Food Services & Drinking Places	\$15,541,971	\$23,041,399	-\$7,499,428	52
7221	Full-Service Restaurants	\$7,161,954	\$8,364,836	-\$1,202,882	29
7222	Limited-Service Eating Places	\$7,053,504	\$12,637,033	-\$5,583,529	13
7223	Special Food Services	\$883,614	\$1,621,569	-\$737,955	1
7224	Drinking Places - Alcoholic Beverages	\$442,899	\$417,961	\$24,938	9

Source: ESRI

Retail Use Feasibility

While the table above shows that about half of the retail industries in the City are experiencing some sales leakage, there is not enough sales leakage to support new a new business except maybe in the Electronics and Appliance Stores industry. This means that the spending power of local residents alone is not enough to support a new business; however, as demonstrated in the analysis of the Regional Retail Trade Area above, there are several opportunities that could capture the spending power of the region as a whole.

Cattaraugus County Trade Area Opportunities					
NAICS	Industry Group	Retail Gap	25% Recapture	Average Sales per Business in Upstate NY	# of Potential Businesses
4411	Automobile Dealers	\$46,415,284	\$11,603,821	\$4,113,929	2.8
4412	Other Motor Vehicle Dealers	\$5,975,447	\$1,493,862	\$782,278	1.9
4413	Auto Parts, Accessories & Tire Stores	\$318,531	\$79,633	\$514,443	0.2
4422	Home Furnishings Stores	\$1,742,657	\$435,664	\$411,520	1.1
4431	Electronics & Appliance Stores	\$8,237,082	\$2,059,271	\$432,258	4.8
4442	Lawn & Garden Equip & Supply Stores	\$699,422	\$174,856	\$194,024	0.9
446,4461	Health & Personal Care Stores	\$4,617,521	\$1,154,380	\$711,067	1.6
4481	Clothing Stores	\$4,382,549	\$1,095,637	\$378,768	2.9
4482	Shoe Stores	\$859,711	\$214,928	\$268,745	0.8
4483	Jewelry, Luggage & Leather Goods Stores	\$752,065	\$188,016	\$131,375	1.4
4512	Book, Periodical & Music Stores	\$214,757	\$53,689	\$294,798	0.2
4531	Florists	\$59,793	\$14,948	\$153,264	0.1
4532	Office Supplies, Stationery & Gift Stores	\$1,450,256	\$362,564	\$159,640	2.3
4541	Electronic Shopping & Mail-Order Houses	\$3,985,320	\$996,330	\$5,055,823	0.2
4543	Direct Selling Establishments	\$374,271	\$93,568	\$3,501,436	0.0
7221	Full-Service Restaurants	\$8,223,762	\$2,055,941	\$305,708	6.7
7222	Limited-Service Eating Places	\$6,920,662	\$1,730,166	\$714,674	2.4
7223	Special Food Services	\$1,637,559	\$409,390	\$828,308	0.5
7224	Drinking Places - Alcoholic Beverages	\$207,183	\$51,796	\$109,014	0.5

Source: ESRI, Camion Associates

Legend:

25% Recapture Rate: Equals 25% of the Retail Gap

of Potential Businesses: Potential recapture divided by Upstate Average Sales

County-Level Data

Since retail sales are reported by county, county-level data is typically the most accurate. Therefore, in addition to examining the trade areas above, we collected county-level retail data to examine the retail gap for Cattaraugus County alone. For the most part, the county-level data aligns with that of the Regional Trade Area.

Cattaraugus County Retail Trade Area Sales Surplus & Leakage					
NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Number of Businesses
441	Motor Vehicle & Parts Dealers	\$124,540,780	\$71,831,518	\$52,709,262	47
4411	Automobile Dealers	\$105,115,943	\$58,700,659	\$46,415,284	20
4412	Other Motor Vehicle Dealers	\$10,937,572	\$4,962,125	\$5,975,447	8
4413	Auto Parts, Accessories & Tire Stores	\$8,487,265	\$8,168,734	\$318,531	19
442	Furniture & Home Furnishings Stores	\$14,665,229	\$15,740,680	-\$1,075,451	31
4421	Furniture Stores	\$9,511,240	\$12,329,348	-\$2,818,108	17
4422	Home Furnishings Stores	\$5,153,989	\$3,411,332	\$1,742,657	14
4431	Electronics & Appliance Stores	\$13,288,831	\$5,051,749	\$8,237,082	20
444	Bldg Materials, Garden Equip. & Supply Stores	\$21,167,492	\$27,613,667	-\$6,446,175	53
4441	Bldg Material & Supplies Dealers	\$18,183,685	\$25,329,282	-\$7,145,597	43
4442	Lawn & Garden Equip & Supply Stores	\$2,983,807	\$2,284,385	\$699,422	10
445	Food & Beverage Stores	\$99,422,638	\$121,340,418	-\$21,917,780	49
4451	Grocery Stores	\$90,491,922	\$109,413,461	-\$18,921,539	25
4452	Specialty Food Stores	\$4,922,255	\$7,550,441	-\$2,628,186	14
4453	Beer, Wine & Liquor Stores	\$4,008,461	\$4,376,516	-\$368,055	10
446,4461	Health & Personal Care Stores	\$25,643,000	\$21,025,479	\$4,617,521	32
447,4471	Gasoline Stations	\$100,217,636	\$137,847,448	-\$37,629,812	31
448	Clothing & Clothing Accessories Stores	\$10,456,179	\$4,461,854	\$5,994,325	28
4481	Clothing Stores	\$7,041,674	\$2,659,125	\$4,382,549	15
4482	Shoe Stores	\$1,758,045	\$898,334	\$859,711	4
4483	Jewelry, Luggage & Leather Goods Stores	\$1,656,460	\$904,395	\$752,065	9
451	Sporting Goods, Hobby, Book & Music Stores	\$6,667,912	\$7,346,352	-\$678,440	45
4511	Sporting Goods/Hobby/Musical Instr Stores	\$5,184,717	\$6,077,914	-\$893,197	40
4512	Book, Periodical & Music Stores	\$1,483,195	\$1,268,438	\$214,757	5
452	General Merchandise Stores	\$87,793,335	\$112,835,700	-\$25,042,365	27
4521	Department Stores Excluding Leased Depts.	\$38,309,381	\$43,082,291	-\$4,772,910	9
4529	Other General Merchandise Stores	\$49,483,954	\$69,753,409	-\$20,269,455	18
453	Miscellaneous Store Retailers	\$13,685,294	\$16,367,537	-\$2,682,243	103
4531	Florists	\$566,171	\$506,378	\$59,793	7
4532	Office Supplies, Stationery & Gift Stores	\$2,998,657	\$1,548,401	\$1,450,256	15
4533	Used Merchandise Stores	\$701,930	\$733,795	-\$31,865	14
4539	Other Miscellaneous Store Retailers	\$9,418,536	\$13,578,963	-\$4,160,427	67
454	Nonstore Retailers	\$19,426,991	\$15,420,566	\$4,006,425	8
4541	Electronic Shopping & Mail-Order Houses	\$5,837,436	\$1,852,116	\$3,985,320	1
4542	Vending Machine Operators	\$5,070,226	\$5,423,392	-\$353,166	3
4543	Direct Selling Establishments	\$8,519,329	\$8,145,058	\$374,271	4
722	Food Services & Drinking Places	\$77,497,446	\$60,508,280	\$16,989,166	183
7221	Full-Service Restaurants	\$35,429,069	\$27,205,307	\$8,223,762	106
7222	Limited-Service Eating Places	\$35,586,772	\$28,666,110	\$6,920,662	49
7223	Special Food Services	\$4,448,279	\$2,810,720	\$1,637,559	6
7224	Drinking Places - Alcoholic Beverages	\$2,033,326	\$1,826,143	\$207,183	22

Source: ESRI

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4481	Clothing Stores	\$4,382,549	\$1,095,637	\$378,768	2.9
4482	Shoe Stores	\$859,711	\$214,928	\$268,745	0.8
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4541	Electronic Shopping & Mail-Order Houses	\$3,985,320	\$996,330	\$5,055,823	0.2
4543	Direct Selling Establishments	\$374,271	\$93,568	\$3,501,436	0.0
7221	Full-Service Restaurants	\$8,223,762	\$2,055,941	\$305,708	6.7
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7223	Special Food Services	\$1,637,559	\$409,390	\$828,308	0.5
7224	Drinking Places - Alcoholic Beverages	\$207,183	\$51,796	\$109,014	0.5

Source: ESRI, Camion Associates

Legend:

25% Recapture Rate: Equals 25% of the Retail Gap

of Potential Businesses: Potential recapture divided by Upstate Average Sales

Retail Market Momentum

As noted above, the Department Stores retail sector has a sales surplus in the Regional Retail Trade Area. This sector received a boost recently as the department store Kohl's recently moved into the Olean Center Mall. The Mall has struggled in recent years but is going through a period of re-birth. It may be possible to build on this momentum by targeting additional clothing/department style stores with affordable goods such as TJ Maxx or Marshall's.

The City is also seeing some momentum in its downtown retail sector. A new bridal salon and a beer & wine store opened recently. The significant Union Street Revitalization project that the City is currently pursuing will help to continue this momentum.

Another exciting project is being planned in Allegany outside of the City, just west of the BOA. This project is a multi-use project known as Bonaventure Square. Plans include a family entertainment center, restaurant, bowling, arcade, 100 suite hotel, medical office, and retail space. While the target market is the St. Bonaventure community (directly across the street) it is expected that the community and region as a whole will benefit from the planned retail and recreation offerings. By providing an array of new retail and recreation amenities for the region, it is expected that this development will also contribute to the region's ability to attract and retain a workforce, which was a concern cited by many.

Retail Market Potential

Based on the data analysis and discussions with local stakeholders Olean has a history of and continues to be a shopping destination for regional residents. There is a growing demand for several sectors, including:

- Full-Service Restaurants - particularly national chain stores
- Electronic & Appliance Stores
- Clothing stores - demand for women's clothing
- Office Supply, Stationary, & Gift Stores
- Health & Personal Care Stores (likely pharmacies)

It is clear that any retail development that occurs in the BOA must complement, not compete, with the Olean Center Mall and the City's downtown businesses. Lifestyle centers have been suggested by some; however, these typically attract a very high-end consumer which, based on the demographic analysis, Olean does not currently offer. Other stakeholders feel that outlet stores that offer good bargains - the other end of the retail spectrum - would do well in the BOA given its proximity to I-86 and regional consumer market.

While Olean as a whole is a service center for the region, most residents make an occasional trip to Buffalo, which offers a considerably larger diversity of shopping and dining options. In most cases, large national chains locate in larger cities - like Buffalo - for their population density and broad consumer market. However, over the last few years many national brands have realized that they are missing out on smaller markets - like Olean - and have developed scaled-down concepts. In some cases, such as in nearby Jamestown NY, several national retailers that typically embrace the "big box" have clustered together to create a neighborhood shopping center. Some companies are even becoming more open to occupying second-generation space, which can allow them to avoid some development issues.⁵ There may be a potential opportunity for Olean to attract a few scaled-down versions of national chains and recapture a good portion of the consumer spending that currently "leaks" up to Buffalo. This type of development is likely better suited for the City's existing retail centers.

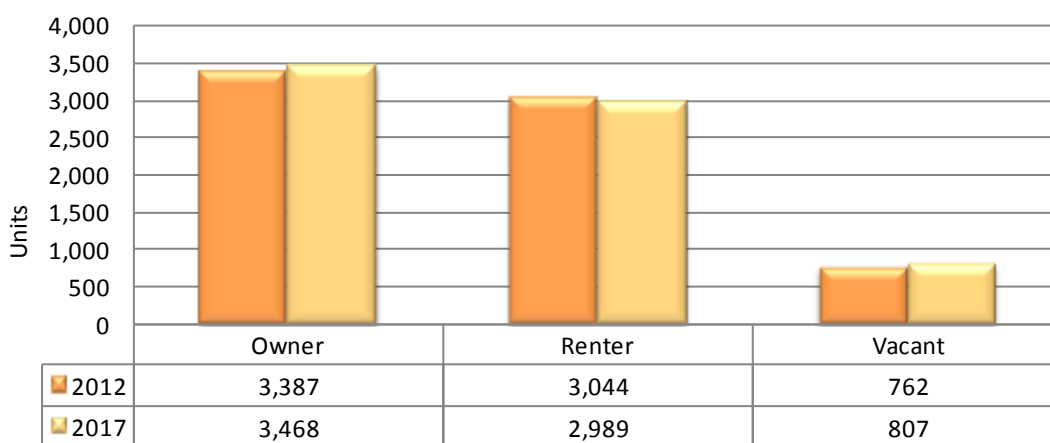
Another suggestion from the interviews was a local farmers market, to give "occasional retailers" an opportunity to sell their goods.

HOUSING MARKET ANALYSIS

The analysis of the housing market helps to identify potential residential developments that could serve currently unmet needs as well as be feasible and marketable in the current real estate environment. For the City of Olean, we examined market demographics and existing housing characteristics in terms of total number of units, vacancy, values, rents, units per structure and age of structure.

According to ESRI data, which is derived from the U.S. Census, owner-occupied housing units are slightly more common than renter-occupied units in City of Olean. 2012 figures show approximately 47.1% owner-occupied versus 42.3% renter-occupied and 10.6% vacant. The vacancy rate is projected to rise to 11.1% by 2017. According to 2007-2011 American Community Survey (ACS) data, the homeowner vacancy rate in the City of Olean is 4.1% and the rental vacancy rate is 5.0%.

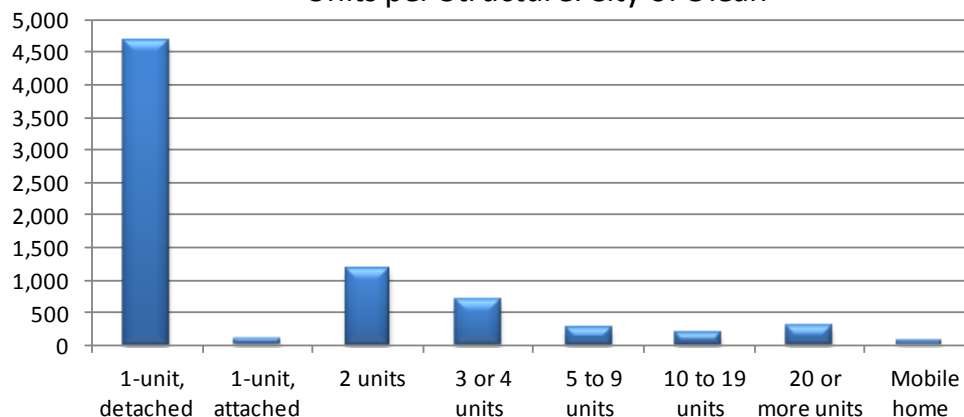
Housing Units by Tenure: City of Olean



Source: ESRI

The vast majority (63%) of units in the City are single-family, detached. Regarding multi-unit structures, most are either duplexes (2-units) or structures with three and four units. There are very few multi-unit properties in the City. The lack of rental properties in the region is a significant issue for local companies trying to recruit young professionals.

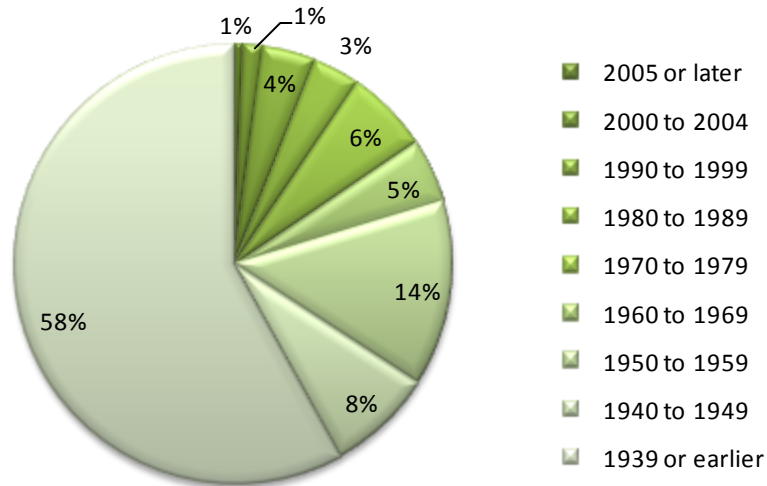
Units per Structure: City of Olean



Source: American Fact Finder, 2011 5-yr estimates

Below is a table showing the ages of residential units (both rental- and owner-occupied) in the City. The majority (90%) were built in the 1930s and before. Less than 1% of the units were built after 2005. As such, there are very few modern residential units on the housing market currently.

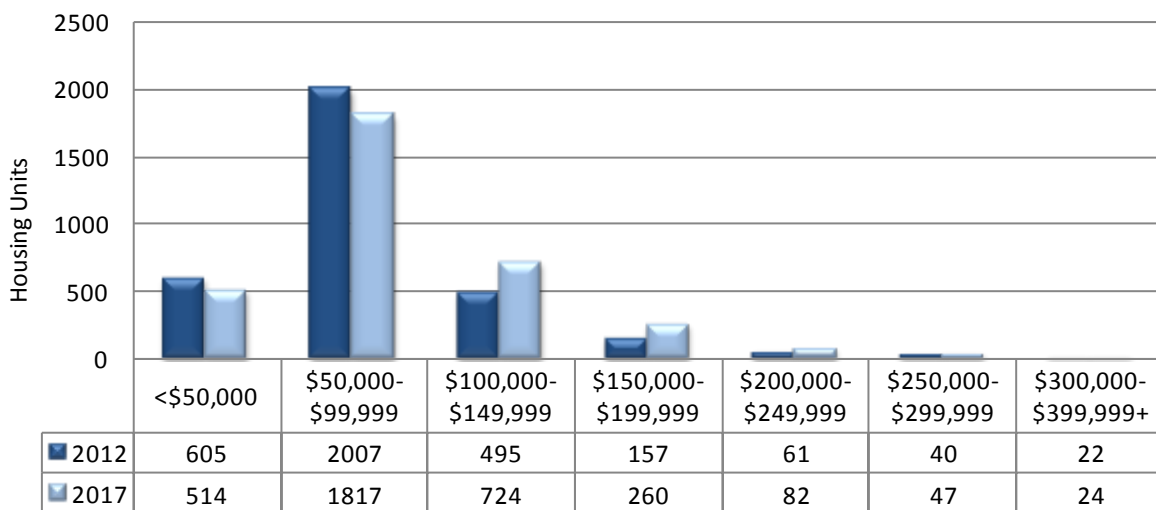
Age of Housing Stock: City of Olean



Source: American Fact Finder, 2011 5-yr estimates

Looking solely at values in the owner-occupied realm, we see a pronounced trend in valuations increasing from 2012 through 2017. By 2015, the \$100,000-\$149,999 range will likely increase from about 15% of the market to roughly 20% of the market. Some of this is due simply to inflation and the anticipated recovery nationally in the housing market.

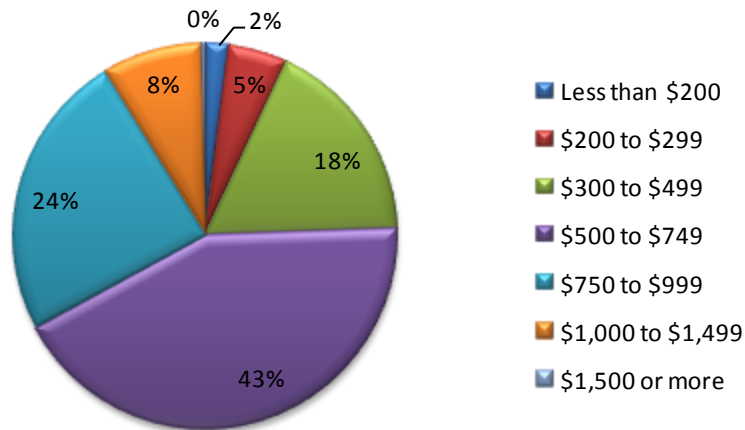
Change in # of Owner Occupied Units by Value: City of Olean



Source: ESRI

Data from the 2007-2011 American Community Survey, 5-year estimate shows that there is a wide range of unit rental prices for the City. Less than 10% of the units rent for \$1,000 per month or more and a significant portion (43%) rent for \$500-\$749 per month - these rates were confirmed by local real estate agents familiar with the market. Again, these rental rates are likely indication of relatively old, modest, and downscale offerings.

Gross Rent: City of Olean



Source: 2007-2011 ACS 5-yr Estimates

Housing Market Opportunity

Taken at face-value, these modest rental rates are not necessarily in a “developer-friendly” range and do not justify a new development or renovation project without substantial public assistance serving as a catalyst. However, there may never the less be an opportunity to provide modern rentals in the range of \$1,000 to \$1,500 a month.

Kinley Corporation had good success when it tested the high end of this market with a townhouse complex a few years ago. The project included 1,200 square foot units that sold for \$175,000 and rented for \$1,500 a month plus utilities. Both the rentals and townhouses filled up quickly and remain occupied. Kinley recently sold the development to a local investor who now manages the property.

Since the City’s population is made up predominately of 25-64 year olds, a good target market for these rentals is working professionals, singles and couples, that may be staring their careers and not yet ready to invest in property. Appliances and finishes should be modern but do not need to be high-end. Even some furnished apartments may be attractive for individuals only planning on staying in the area short-term.

Additionally, if New York State does allow hydrofracking in the future and Olean is able to attract gas-related companies, there will be a significant increase in demand for rental properties to accommodate the workforce associated with this development. As seen in Chemung County, extended-stay hotels would also be a significant development opportunity to serve the natural gas industry’s fluctuating workforce.⁶

⁶ We learned during the interviews and through research that the initial drilling of the wells requires a significant amount of workers to perform the necessary tasks. However, once the drilling phase is complete and the actual fracking begins is employment is reduced significantly.

The ideal setting for multi-unit residential development is in the eastern portion of the BOA along the river. Since the properties directly across the river are in the floodplain and mostly undeveloped, this portion of the BOA provides an attractive view-shed coupled with easy access to many of the City's largest employers, including Dresser Rand and Olean General Hospital. Locational and view-shed conditions would allow a developer to charge premium rents and would serve to enhance demand for the end product. To allow this to occur, the City would need to be proactive in terms of zoning and other considerations.

City of Olean DPW Facility
Conceptual SF Construction Estimate

March 18, 2015

Building Construction

Construction Category	Quantity	Unit		\$/Unit *		Cost
Office Buildout	3,645	SF		\$168		\$612,360
Maintenance Buildout	12,650	SF		\$147		\$1,859,550
Heated Storage	25,610	SF		\$85		\$2,176,850
Unheated Storage	4,320	SF		\$68		\$293,760
Covered Storage	6,500	SF		\$37		\$240,500
Subtotal	52,725			\$98 avg		\$5,183,020

Site Work

	Quantity	Unit		\$/Unit		Cost
Site Work (overall)	1	LS		\$1,750,000		\$1,750,000
Fuel Island	0	LS		\$0		\$0
Salt Barn (10,000 s.f.)	1	LS		\$100,000		\$100,000
Box Culvert	2	LS		\$125,000		\$250,000
Subtotal						\$2,100,000
Construction Subtotal						\$7,283,020
Contingency				25%		\$1,820,800
Design				12%		\$1,092,458

CONSTRUCTION TOTAL

\$10,196,278

Assumptions:

1. Buildings are to be pre-engineered metal buildings.
2. No hazardous materials removal is required.
3. The soil bearing capacity is 3000 psf min.
4. Utilities to the site are adequate.
5. Retaining wall design is not anticipated and therefore is not included.
6. Wetlands are not located on the site and therefore delineation and permitting are not included.
7. Relocation, mitigation, and/or permitting associated with Two Mile Creek along Homer Street is not anticipated therefore is not included.
8. Relocation of existing drainage ditch between railroad tracks and Two Mile Creek does not require mitigation or permitting.
9. Offsite (outside project limits) highway, sanitary, drainage, watermain extensions or downstream drainage or water distribution studies or design of improvements are neither anticipated nor included. Sanitary sewer, watermain, & gas services are adequate and available at the street to meet the projects needs.
10. Storm sewers and stormwater detention will be conventional gravity design and managed on-site. We have assumed that no further downstream analysis of storm water is necessary. Groundwater depth is adequate to allow for excavation of stormwater detention ponds.
11. We have assumed a conventional gravity sanitary sewer system will be used for this project. No pump stations are required.
12. Sub-soils are adequate to sustain standard pavement designs.

Project **Olean DPW Site**
 Client

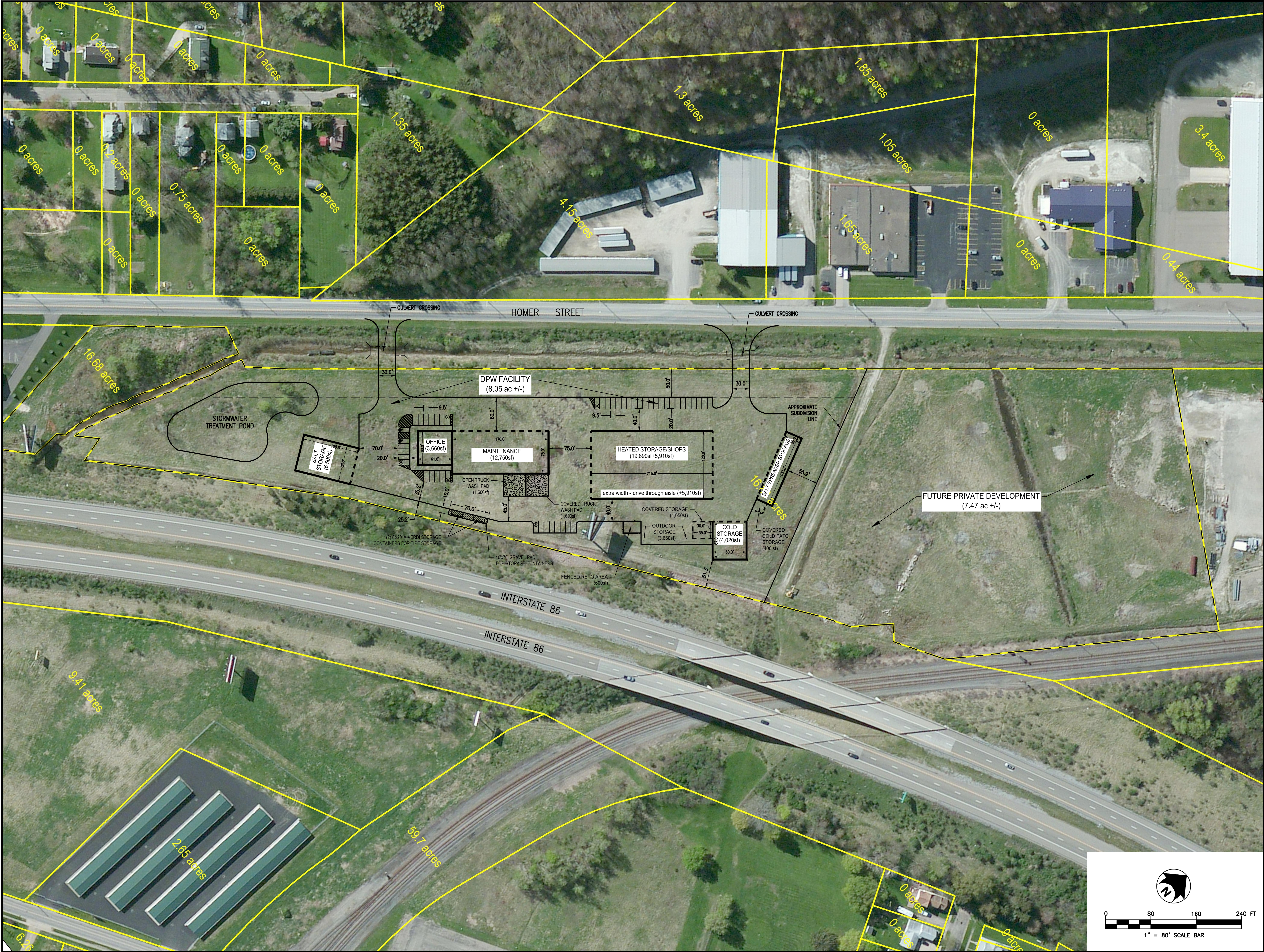
Engineering Rough Order of Magnitude Costs Demolition of Existing Buildings

NYS DOT Prepared by Bergmann Associates - March 25, 2015

					TOTAL	
	Item No.	DESCRIPTION	UNIT	PRICE	QTY	COST
	203.02	Unclassified Disposal of Millings	CY	\$27.00	377.00	\$10,179.00
	203.xx	Excavation for Sidewalk	CY	\$25.00	0.00	\$0.00
	209.13	Silt Fence - Temporary	LF	\$1.50	1200.00	\$1,800.00
	209.1701001	Pavement Milling, Top and Binder Courses (Depth to 4")	SY	\$9.00	4532.00	\$40,788.00
	304.12	Crushed Stone 3/4" to Stabilize Site 4" thick	CY	\$29.00	738.00	\$21,402.00
		Main Building Demolition, 8,172 Two Story and 9,774 Single Story Masonry	SF	\$4.00	17946.00	\$71,784.00
		Secondary Metal Building Demolition Single Story 3,085 sf	SF	\$3.00	3085.00	\$9,255.00
		Salt Barn 2,666 sf	SF	\$2.50	2666.00	\$6,665.00
		Electric and Gas Services Disconnects (Estimate)	LS	\$5,000.00	1.00	\$5,000.00
		Watermain Removal	LF	\$15.00	100.00	\$1,500.00
		Roof Lateral Sewer Removal	LF	\$5.00	300.00	\$1,500.00
		Sanitary Sewer Removal	LF	\$10.00	100.00	\$1,000.00
		Electric Service Removal	LF	\$30.00	50.00	\$1,500.00
		Gas Service Removal	LF	\$12.00	50.00	\$600.00
		Chain Link Fence Removal	LF	\$4.00	765.00	\$3,060.00
		Barb Wire Removal 3 strand	LF	\$2.15	200.00	\$430.00
<i>SUBTOTAL SITE DEMOLITION CONSTRUCTION COSTS</i>						<i>\$176,463</i>
		Contingency Factor	LS		10%	\$17,646.30
	619.01	Basic Work Zone Traffic Control	LS		5%	\$8,823.15
	634.01	SWPPP Inspections	LS		2%	\$3,529.26
	699.04	Mobilization	LS		5%	\$8,823.15
<i>SUBTOTAL DEMOLITION COSTS Lump Sum PERCENTAGES</i>						<i>\$38,822</i>
<i>TOTAL CONSTRUCTION COST</i>						<i>\$215,285</i>

Assumptions

All buildings have been cleaned of hazardous materials.
 Existing storm sewer will remain to drain run-off after stabilization
 Clean stone will be spread over the site for temporary stabilization
 Existing asphalt is 4" thick
 Foundations and Footings for all structures will be removed.



DPW FACILITY

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Olean, NY 14760

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REVISIONS				
NO.	DATE	DESCRIPTION	REV.	CK'D

CONCEPT SITE PLAN

NOTE:
Unauthorized alteration or addition to this drawing is a violation of the New York State Education Law Article 145, Section 7209.

Project Manager:
K. BAPTISTE
Designed by:
E. SHAW
Drawn by:
E. SHAW
Checked by:
K. BAPTISTE
Date Issued:
3/3/2015
Scale:
1" = 80'

Project Number: 9440.00 File Name: 944000-CP01-OLEAN DPW-HOMER-CITY ONLY-DEV.DWG

Drawing Number:

CP01.2

of



Olean Brownfield / Industrial Area Revitalization

MARKETING PLAN

Prepared for
The City of Olean, New York

August 2014

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marketing plan

Presenter contact: Craig Thrall; cthral@jfitzgeraldgroup.com

MARKETING PLAN / Olean Revitalization

I. Executive Summary

The main objectives for our marketing and branding efforts for Olean, NY, are to support development and redevelopment efforts in underutilized, vacant and brownfield properties in one centrally located land area. We seek to increase awareness of offerings and assets with the goal of bringing in new industry and commercial business. This plan takes into consideration the findings and recommendations of studies/reports conducted by Camoin Associates and Herron Associates.

At the same time we need to be mindful to view the entire community as a whole – including large industry, small business/retail and residential - as key players. This will involve embracing the community's historic heritage and treasures in an effort to attract and retain businesses of all sizes and residents of all walks of life. A phased approach is recommended to achieve immediate success and build a foundation that can sustain and breed new and ongoing success.

II. The Challenge

- Determine recommended Branding and Marketing plan strategies
- Messaging direction for marketing materials and promotions
- Support efforts to recruit industry and businesses to encourage economic development at many levels
- Support the established Vision Statement

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Marketing Communications
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Vision Statement:

The Olean Northwest Quadrant Revitalization Area aspires to be one of the region's nationally competitive employment centers, providing high quality jobs across a diverse base of advanced manufacturing and technology. The following strategies are core to the success of this vision:

- Remediate and re-use brownfield sites for their highest and best use as determined by their location, market conditions and community input.
- Establish a regulatory framework consistent with NYS Smart Growth Principles allowing for the efficient review and approval of development while ensuring a high quality built environment.
- Stabilize neighborhoods in the study area by investing in infrastructure, infusing housing types attractive to a range of ages and incomes.
- Advance design principles supportive of healthy living and high quality of life including a safe and connective street system with pedestrian facilities that support non-motorized trips to employment, downtown and recreational resources.



III. Situation Analysis

SWOT Analysis

Olean's internal attributes can be classified as *strengths* and *weaknesses*, while the external environment presents *opportunities* and *threats*.

Strengths (internal)

- **Transportation Access & Proximity**
 - Good access from I-86
 - Gateway to midwestern cities (halfway between Chicago and Boston)
 - Many industrial sites are accessible by rail – including nexus of two key rail lines (Southern Tier Extension and Buffalo Line)
 - Proximity to a major airport (Buffalo Niagara International Airport) located 60 miles away (1.5 hour drive)
 - Close proximity to Pennsylvania (less than 10 miles away)
 - Once complete, Route 219 expansion will provide even greater access
 - Public transportation available to most residents
 - Centrally located as a destination stop beyond larger nearby towns, namely Jamestown to the west, Corning to the east and Buffalo to the north
- **General**
 - Open, accessible land:
 - Over 150 acres available for development in the Northwest Quadrant Brownfield Opportunity Area (BOA)
 - Located within commuting distance to urban centers of Jamestown, NY, and Bradford, PA
 - Located within short driving distance from border states and larger urban centers of Buffalo, NY, Warren, PA, Erie, PA and Canada
 - Workforce:
 - Hardworking, resilient, strong work ethic
 - Trainable
 - Property costs are lower than surrounding areas



- **Community / Quality of Life**

- A safe, small-town community:
 - Perfect for visitors, businesses and families to take root
 - Ideal for visitors and those seeking new residence away from large, fast-paced urban settings
 - Geographically isolated into its own community (advantages/disadvantages)
 - Safe with low crime
 - Rural, open setting outside of the central city core
 - Four seasons – outdoorsmen; recreation
 - This quality of life should be used to the advantage of Olean in marketing efforts
- Quality public schools and nearby higher education institutions of distinction
- Excellent hospital and medical offerings
- Historic downtown commercial shopping district
- Nearby water access (mostly for recreation)
- Wide variety of services/amenities
- Every residential parcel in the revitalization area within ½ mile walk of a park/open space

- **Attractions**

- Rock City Park
- Allegany State Park
- Allegheny River Valley Trail
- Allegheny Mountains
- Olean Point Museum
- Sports:
 - Division 1 Sports (St. Bonaventure)
 - Bradner Stadium (multi-sport)
 - Sport Fishing and Derbies
 - Holiday Valley / Skiing / Other ski resorts
 - Four-Season Outdoor Recreation
- CUTCO/KA-BAR Visitors Center
- Olean is a central point for camping, hunting and other outdoor activities; there are state parks, state and national forests and game lands all within easy driving distance
- Nearby casinos:
 - Seneca Allegany Casino (Salamanca, NY)
 - Presque Isle Downs & Casino (Erie, PA)

- **Cultural Attractions**

- Olean Community Theatre
- Olean Theatre Workshop
- Regina A. Quick Center for the Arts (St. Bonaventure)
- Woodland in the City
- Pfeiffer Nature Center
- Seneca Art & Culture Center
- Fannie E. Bartlett Historical Center
- Arts / Squirrel Community Project



Weaknesses (internal)

- Need job opportunities to create an employment center
- Not enough suitable office space downtown
- Excellent industrial rail access but no train station for passenger use
- Declining population
- Reduction in workforce
- Housing:
 - Not varied and is declining in quality (average residential home value: \$75,000-\$80,000)
 - Weak rental housing opportunities
 - No zoning buffer between residential and industrial districts
 - Local business professionals/executives living/spending in outer areas (Ellicottville, Allegany, Bradford, etc.)
- Not enough variety/diversity in terms of a shopping district (for residents or tourists):
 - Lack of big box options
 - Lose shopping dollars to Erie, PA, Buffalo, NY, and online shopping
- Underutilized public parks and/or lack of green space:
 - Compounded by a limited park staff for maintenance of existing or future parks
- Traffic flow/congestion
- Isolated location – can be considered a liability
- Need reliable marketing budget to launch initial efforts and sustain progress going forward



Opportunities (external)

- Focus on the strengths of the BOA properties:
 - Advantages of EPA/DEC support, credits and sign-off
 - “Certified Clean”:
 - Technology and amenity access
 - High pressure steam access
 - Water access
 - Services access
 - Availability of all infrastructure (water, wastewater, electric, gas, telecom)
 - Much easier for developers – because properties are involved with the New York State Brownfield process
 - Incentives and tax deferments
 - Unique features of each parcel
 - Existing buildings and facilities on some industrial properties:
 - Open floor plans
 - Large bay doors
 - High ceilings
- Address the area’s industrial legacy – and work to show how now, due to regulation and clean up efforts, industry is cleaner and different
- Potential tie into NYS’s SUNY “Tax-Free NY” plan (support businesses associated with and adjacent to SUNY campuses) and “Start-Up NY” (incentives for certain business types expanding or relocating to NYS)
- Potential lower-cost energy power incentives to offer new/expanding industry and business
- Growth and business sustainability through continued cooperative assistance and tax breaks from the city, county, state and IDA(s)
- Nearly 2/3 of revitalization area is zoned industrial
- Many shovel-ready industrial properties with ready utilities and resources
- Vacant land comprises the largest land use type (23.6%) – ahead of commercial (17.5%) and residential (15.9%)



Opportunities (external) - *continued*

- Build up the growing educational corridor with proximity to education centers, expansion for upscale housing and pool of nearby educated graduates:
 - St. Bonaventure
 - Jamestown Community College (JCC)
 - Cattaraugus-Allegany BOCES
 - Alfred State
 - Houghton College
 - University of Pittsburgh at Bradford
 - Tech schools
- Offer incentives or cheaper retail rent for businesses
- Strong, well-respected hospital; growing medical corridor
- Attract and retain young professionals
- Position Olean to selecting companies/industry as part of a larger area made up of more attractive demographics; not just Olean, but to include the educational and medical corridors and surrounding markets as one:
 - More than 120 million people reside in a 500 mile radius of the Southern Tier, which includes 50 percent of the United States population and 62 percent of Canada's population
- Create volunteer teams to beautify the city and “adopt a park” (employee groups, higher education students)
- Promote winter and four season recreational activities:
 - Fishing, wildlife, outdoors/nature, hunting, motorsports/quad machines
- Create more biking/walking trails to make the whole community pedal/pedi friendly
- Develop a brand identity that showcases Olean



Threats (external)

- High NYS taxes and regulatory burden limiting new business growth – and pushing existing NYS business to other states – including nearby PA
- High energy rates (reportedly 2X higher than PA for electricity)
- Need to attract and retain new business; economic development
- Environmental concerns:
 - Concern/misinformation associated with industrial brownfields
 - Negative legacy of area's industrial past
 - Perception of DEC/EPA "hassles"
- Bureaucracy – Politics – Red Tape
- Apathy; "Nothing will ever change" attitude
- Lack of trust for government
- Need to develop attractive/modern housing options, including upscale residential for doctors and higher paid professionals:
 - Many end up buying – not renting due to lack of options
 - Very few upscale rental options
- Need to overcome perceptions that keep people / business away:
 - "un-advanced"
 - "Podunk"
 - "nothing to do here"

Competitor Analysis

Understand that whether perceived or not, Olean is in competition with other regional cities as a destination for industrial / commercial business, tourism and residents.

Many nearby towns / cities feature some level of attractions, events, etc. that are leveraged to draw businesses and tourism:

- **Ellicottville, NY**, successfully built upon its reputation as a skiing resort by augmenting offerings of summer concerts, a Fall Festival, zip line adventures, golf and as a destination for business conferences
- **Erie, PA**, positioned its Splash Lagoon into further economic development for restaurants, shopping, Erie Otters hockey, and other attractions that include a zoo, children's museum and more
- **Jamestown, NY**, has experienced growth due to the success of its Lucille Ball Comedy Festival, skating rinks and tournaments, Arts Center, Audubon Nature Center and more



IV. Market Segmentation

There are three key markets to consider from a citywide perspective – however they should be weighted for our focus as follows:

Segment 1 – Industry / Commercial Business	(85% focus)
Segment 2 – Retail / Consumer Business	(12% focus)
Segment 3 – Local / Regional Residents & Visitors	(3% focus)

Segment 1 – Industry / Commercial Business

- Description:
 - Various sizes, not just large with 2,000+ employees, but also multiple businesses with 20-200 employees
 - Those seeking a new home to start, relocate or expand a commercial business
 - Entrepreneurs that are local, regional and out of state/country
- What they want:
 - Space/acreage – with room for growth and expansion
 - Good employee workforce
 - Government support / workable regulatory conditions
 - Low taxes / tax credits / tax exemptions
 - Natural resources
 - Ease of travel (imports, exports, shipping, customers)
 - Rail / interstate access
 - Infrastructure – ideally in place for turnkey operation startup
- How they use product/service/offering:
 - Open or expand business enterprise
- New and/or preferred targets:
 - Advanced manufacturing
 - Distribution / processing
 - Warehousing
 - Professional services
 - Urban Agriculture / Agribusiness
 - Heavy / commercial industry
 - Clean industry
 - Light manufacturing
 - Durable goods manufacturing
 - Medical manufacturing
 - Gas and oil, including support
 - Fracking industry support
 - Service distribution
 - Trucking
 - Wholesale



Segment 1 – Industry / Commercial Business - *continued*

- Food system development / Food hubs (facilities that manage the aggregation, storage, processing, distribution or marketing of locally and regionally produced food):
 - Yogurt
 - Wine / spirits
 - Microbreweries/hops industry
 - Humane meat processing (key need: storage space)
- Office / business management
- Call centers
- Training centers / technical training / incubation centers
- How to reach them:
 - Incentives
 - Bids / Call for proposals
 - Economic development
 - Tradeshow
 - IDA / Chamber of commerce
 - Real estate mediums
- Price sensitivity:
 - Price is important but not the greatest priority
 - Location, access and site specifications are highest priority



Segment 2 – Retail / Consumer Business

- Description:
 - Businesses – large and small; mom/pop; national restaurants; small box
 - Focused more on retail or consumer business
 - Occasional retailers (farmers, crafters, part-time space needs)
 - Seeking a new home to start a business, relocate or expand operations
 - First time entrepreneurs and existing business operations that are local, regional and out of state/country
- What they want:
 - Space – with room for growth and expansion
 - Good employee base
 - Government support / workable regulatory conditions
 - Low taxes
 - Clientele or business purpose (reason to operate)
 - Natural resources
 - Ease of travel (customers, imports/exports, shipping/receiving)
- How they use product/service/offering:
 - Open or expand business enterprise
- How to reach them:
 - Economic development
 - Incentives
 - Tradeshows
 - Chamber of commerce
 - Real estate mediums
- Price sensitivity:
 - Price (within the context of the entire picture – space, people, taxes, resources, livability, etc.) is very important



Segment 3 – Local / Regional Residents & Visitors

- Description:
 - People within a close regional “home” range, including residents of the City and Town of Olean, Cattaraugus County, Chautauqua County, Allegany County, Erie County and Warren, McKean and Potter in PA
- What they want:
 - Something easy going, unpretentious
 - Modern; good quality; good value
 - A warm, friendly quality of life
 - A place to go for something unique and different
 - A quick, nearby getaway – for a day or short trip
 - Family friendly
- How they use product/service/offering:
 - A place to call home
 - Entertainment
 - Recreation
 - Casual pleasure
- How to reach them:
 - Local advertising (print/broadcast/outdoor)
 - Postal mail
 - Email
 - Social media
 - Referrals from friends, families and other local businesses/attractions
- Price sensitivity:
 - Price is very important
 - Looking to maximize budget through affordable living (residents)
 - Looking to maximize budget through low-cost values (tourists)
 - Priced to accommodate the entire family at a reasonable rate



V. Selected Marketing Strategy

Product

Olean's main product is its industrial/business offerings, namely its:

- Shovel-ready industrial property
- Large amounts of vacant land
- Excellent transportation access

Price

Olean's industrial and commercial offerings present good overall value in relation to products/sites, surrounding assets (transportation, infrastructure) and regional competition.

Private ownership for 80% of total land in the BOA poses both challenges and opportunities.

Where possible, government-owned parcels can be sweetened with incentives and breaks to encourage development and expansion.



Overall Recommendations

We recommend taking a phased approach comprised of two main stages or time periods:

Phase 1: Marketing / Branding for the Industrial BOA & properties as a whole

Timeframe: Immediate

Will market the entire BOA/industrial core as one collective area, promoting the general benefits of the entire sector, as well as assets/specs of individual parcels (which could be either select parcels or all parcels).

Because land ownership varies between public and private this phase will be focused on marketing the area with a goal of making all parties profitable and successful together. When Olean as a whole prospers the individual parties that make it up will also be successful. Cooperation and collaboration between public and private sectors is key during this phase. A unified, “group” approach in marketing will assist in this effort.

Although landowners vary in how they market their individual properties, as well as what they hope to secure as prospective buyers / renters and in their timelines for site/seller readiness, this approach will help everyone “speak from the same script” and position the Olean land area as a destination of choice for site selectors.

This phase will include the roll out of an overall brand and campaign theme that should be used in marketing the area’s industrial/business identity on a local, regional and national level.



Phase 2: Marketing / Branding for the City as a whole

Timeframe: 2015 and beyond

Will include promotion of the entire City and all of its key assets, namely a small town community with a strong quality of life. Included in this phase will be promotion of tourism attractions and other assets of the broader community.

This phase can begin on some level in the immediate future, but can advance on a larger scale after there is significant progress in building out the industrial BOA. Some measures of success in Phase 1 can allow the building and sustaining of more success and growth through the marketing of the City and community as a whole. This will help each side of the equation feed and support the other. A stronger industrial business core will support a higher tax base and a greater number of residents with more income and a greater need / desire to spend locally. Better housing, more retail shopping and a more vibrant community supports industry with a happy, diverse and growing workforce. The back and forth support continues and grows exponentially.

Marketing and branding of the City and expansion and amplification of efforts such as signage, beautification, events, promotions and awareness during this phase – particularly in regard to downtown – can help take a community to new heights.



Branding/Campaign Theme

Olean needs a branding and campaign theme that can be used consistently in all marketing efforts. It should be utilized by all parties with a stake moving Olean forward, including government and all individual land owners in the BOA. Branding the area as one shows liked-minded and like-run industrial and commercial business enterprises that there is a welcoming environment to this type of business we want to attract, not a shunned relegation to the outskirts of town.

Campaign themes need to be separated by Phase, with one for immediate use in promoting the industrial areas inside the BOA and another for Phase 2 that is reflective of the entire City.

Recommended Theme – Phase 1 (Northwest Quadrant BOA)

- *Top Suggestions*

“Olean: Land of Industrial Opportunity.”

“Join Olean’s Industrial Solution.”

“Join Olean’s Industrial Evolution.”

“Join Olean’s Industrial Revolution.”

“Industrial-Sized Opportunity.”

“Industrial-Sized Land of Opportunity.”

“Industrial Strength Business Opportunity.”

“Industrial Strength Opportunity.”

“Manufactured for Results.”

“Powering Your Business Opportunity.”

“Olean: Come Spread Your Operations.”



- *Other Choices*

“Your Industrial-Sized Opportunity.”

“Olean: We are Industrial Strength.”

“Olean: Your Base of Operations.”

“Olean: Your Industrial Base.”

“Your Industrial Force.”

“Manufactured for You.”

“Olean: Come Spread Your Wins.” (*NOT A TYPO*)

“Olean: Fueling your Passion for Business.”



Recommended Theme – Phase 2 (Citywide)

Can work in tandem with and enhance current downtown merchant group efforts (St. Bonaventure student plan: “*Onward Olean*”)

- *Top Suggestions*

“Olean: En Route To Greatness.”

“Olean: Open for New Adventures.”

“Olean: Industrial Strength Quality of Life.”

“Olean: You’re Welcome. With Open Arms.”

- *Other Choices*

“Olean: Your Path to A Better Way.”

“Olean: Head for the Valley.”

“Olean: Your Link to Life.”

“Olean: Your Link for Life.”

“Olean: Your Mainline for Life.”



Marketing Plan Tactics

Phase 1: Marketing / Branding for the Industrial BOA & properties as a whole

The following tactics could be developed for immediate utilization in support of marketing and branding the industrial BOA and properties as a collective whole.

Develop The Brand

- Create logos and an identity graphics package that can be utilized by the City and all stakeholders / land owners in the BOA
- Infuse into new and existing signage where allowable – including “LAND AVAILABLE” signage
- Surround the brand with engaging news and information about new industry filling the vacancies; updates on BOA process/remediation, etc.
- Reinforce through communication of accomplishments to date
- More aggressively communicate activities and plans for the future to national developers and site selectors (“See what Olean is doing...”; “See what’s working...”)



Web Communications

Create a separate micro website strictly geared toward marketing the BOA/industrial properties as a whole. Target audience would be industrial site selectors.

The microsite and physical BOA/Industrial area (much like the naming of a business park) should utilize a name; something memorable that brings some cachet and solidarity to the collective. Suggested names (which play on Olean's namesake oil and industrial heritage) could include:

- **The Barrel District** (oil production; general industry)
- **Rock Oil District** (means petroleum)
- **The PowerPlant**
- **Driller District**
- **Hard Hat District**
- **Diesel District**
- **Derrick District** (as in oil derrick)
- **Motorhand District** (oil drilling worker term)
- **Powerhouse District**
- **The Plant District**
- **Mineral District**
- **The Production District**

Create the site and all printed support materials (which would also be utilized as a bundled kit in a digital format for sharing and downloading from the site) – then launch and promote the site with a promotional splash geared toward the target audience.

NOTE: **all names above are available** (as of August 2014) as short, desirable domain names. Only one would require adding "Olean" to the domain name to make it truly unique and different from the taken, shorter name without Olean (PowerPlantOlean.com)



Site features could include:

- Videos, downloads, virtual site tours, PDFs and links to all the specifications and details about each site
- Certain areas of the site or information could be password protected (not viewable by all visitors)
- Could show all the BOA sites or only focus or feature a few select sites
- Include key contacts for each site
- Make the site user-friendly and easy to find for site selectors and industrial/manufacturing companies to discover and explore what Olean has to offer
- Create and send E-blasts targeted at industrial developers/investors – pushing call to action of visiting the micro website
- Website banner ads can be utilized on this micro website, other sites controlled by Olean, and purchased space on sites viewed/utilized by target audiences:
 - Push call to action of visiting the micro website
 - Target placement on key industries and business categories
 - Target key geographic areas and regions – including Pennsylvania and nearby urban centers where open land is at a premium
 - Focus on a message of “Industrial Space/Land AVAILABILITY”
- Micro website would tie in and family with the community/quality of life Olean micro website that could be created in Phase 2



Signage

- Large, bright colored signs that read “AVAILABLE – Industrial Space/Land”:
 - o Prominently place off of I-86, Route 16 and/or Route 417
 - o Make it clear – Will build to Suit; XYZ lot with specs; etc
 - o Utilize branding / graphics standards

Collateral Materials

- National Outreach Package:
 - Invites developers and site selectors to review available opportunities and submit bids to develop the land parcels
 - Includes all the details about each parcel for sale (specifications, classifications, zoning, certifications, images, video links, renderings)
- Business Recruitment Kit:
 - Geared toward highlighting the many reasons why business profitably works in the Greater Olean Area
 - Feature success case studies
 - New opportunities available with renderings
 - Highlight resources and incentives available
 - Make the kit printed and web/digital friendly

Investor/Developer Forum

- Host event on development sites or nearby showcase locations
- Walk through the key offerings – talking details and incentives
- Create promotional materials with key specs and visuals
- Tailored to recruit large-scale industry and business

Industry / Trade Show Attendance

- Although some trade shows are by special invite only, attempt to attend regional and national shows geared toward specific industry and business that would be a good fit for Olean
- Recruitment trips



Video

- Create videos focused on the needs of the key audiences:
 - Industry/Business Recruitment
 - Profiles of each site
 - Environmental certifications / Clean up efforts in progress
- House the videos on the BOA/industry recruitment micro website

Advertising

- **Print advertisements** in local, regional and national publications relevant to target audiences:
 - Focused on industrial and economic development; jobs
- Key business resources:
 - Business publications and websites
 - Tradeshows
 - Chamber of commerce
 - Business real estate
- **Billboard** advertisements on I-86 access to/from Olean and areas farther away:
 - Promote business/industry availability and opportunity
- **Television** spots:
 - Local New York & Pennsylvania region



Direct Mail

- Target audiences through direct mail postcards and expanded/foldout mailers:
 - Focused on industry/business land availability and opportunities
- Mailers can be targeted to specific mailing lists geared toward:
 - Advanced manufacturing
 - Distribution / processing
 - Warehousing
 - Professional services
 - Urban Agriculture / Agribusiness
 - Heavy / commercial industry
 - Clean industry
 - Light manufacturing
 - Durable goods manufacturing
 - Medical manufacturing
 - Gas and oil, including support
 - Fracking industry support
 - Service distribution
 - Trucking
 - Wholesale

Business or Developer Incentive Program

- Develop incentives to encourage businesses to relocate or expand in Olean:
 - Utility discounts or breaks for a certain amount of time
 - Microloans
 - Discounted fees and permits
 - Special deals for employees:
 - Club/Gym membership
 - Restaurant discounts
 - Lodging breaks
- Develop incentives to encourage private industry and businesses to pay attention and care about their public appearance and creation of public amenities:
 - Provide incentives, awards or public recognition for those that:
 - Develop or build spaces for shared use and community enjoyment
 - Show care for their appearance and cleanliness
 - Feature designs that meet established look guidelines (for public or interstate facing frontage)



Public Relations

- Publicize and promote when industrial properties achieve EPA/DEC sign-off
- Develop ongoing public relations articles and positive events and activities to promote business happenings
- Properly respond to inquiries about activities and events
- Maintain and develop relationships with industrial business writers and editors
- Compile and manage an editorial calendar to ensure a consistent stream of news in key media:
 - Write and submit articles / pieces for industry and trade publications to showcase Olean's infrastructure, success stories and available opportunities

Public Education Sessions

- Keep the public informed and educated – and seek acceptance and buy-in:
 - Take it to the people – either piggybacking on existing events or creating new ones
 - Don't just expect people to come to City Hall
- Host a "Brownfield Education" forum to educate residents and businesses:
 - Seek to overcome worries and perceptions of environmental concerns
 - Remove stigma of older industrial areas or "black forests" that should be avoided
 - Outline the progress
 - Inform what concerns / areas DEC is addressing
 - Invite and include as participant speakers some industrial owners / neighbors that can speak to their experiences working in and around these type of spaces

Testimonials & Success Stories

- Utilize and promote a few key local, long-term success stories that show, "It works here", such as:
 - Dresser Rand and its recent multi-million dollar investment in the facility (John Stahley, General Manager)
 - CUTCO
 - Sol-Epoxy (Jeff Belt)
- Leverage business successes through case histories:
 - Third-party credibility
 - Generates new business
 - Place in key industry publications
 - Populate on website(s)



Phase 2: Marketing / Branding for the City as a whole

The following tactics could be developed further down the road during Phase 2 of the campaign, with a broader focus on the entire City as a whole and assets that include residential interests, smaller business, community and quality of life.

Develop The Brand

- Create logos and identity standards, branding the City as a whole so it can be utilized by the City and all like-minded business stakeholders
- Infuse the brand into new and existing signage where allowable
- Surround the brand with engaging news and information about new business or economic development, new downtown features, events and activities
- Reinforce through communication of accomplishments to date
- By 2016 integrate the new brand seamlessly into all City communication across all internal and external communications, banners on downtown lights, etc.
- Give the brand increased visibility at key areas outside the downtown area (events, partner community presence, etc.)



Web Communications

Create a separate micro website strictly for the promotion of the Olean business, residential and quality of life assets (separate from the [government site](#) or [Cattaraugus County's Enchanted Mountains](#) site). Target audience would be current residents, visitors, local businesses and potential residents/businesses.

Site features could include:

- User-friendly and easy to find information about what Olean has to offer, making it simpler to use than hard-to-find information on a deep content government site
- Cross promotion of all Olean offerings
- Could include sub-micro sites or content focused on:
 - new business/economic development
 - tourism/cultural offerings
 - community/quality of life
- Create and send E-blasts targeted at current residents, recent visitors, smaller business, and industrial developers/investors – pushing call to action of visiting the micro website
- E-newsletters that can be downloaded off the site, emailed or printed and postal mailed
- Website banner ads can be utilized on this micro website, other sites controlled by Olean, and purchased space on sites viewed/utilized by target audiences:
 - Push call to action of visiting the micro website
 - Target key geographic areas and regions – including Pennsylvania and nearby urban centers
- Micro website would tie in and family with the micro website featuring the BOA/industrial sites created in Phase 2

Other City controlled sites (including the [government site](#)) should receive a facelift to family and tie in with the established brand.



Video

- Create videos focused on the needs of the key audiences
 - Residents/Community/Retail Business/Quality of Life:
 - Amenities
 - Tourism
 - Housing
 - Community Assets
 - Arts/Theatre/Culture
 - Entertainment
 - Sports
 - Parks/Recreation
 - Public Schools and Higher Education
 - Police/Fire/Public Services
- House the videos on the Olean community/quality of life micro website

Support Team Groups

- Recruit support teams and subcommittee task forces to support and achieve specific goals related to marketing and promotion:
 - Made up of business and community leaders, as well as stakeholders from nearby collaborating communities, Cattaraugus County, etc.
 - Local business retirees can also bring a professional expertise not common in small towns:
 - Leverage their combined expertise and contacts
 - Helps create true buy-in
- Create a new business opportunity effort geared toward existing successful businesses:
 - Help them identify and pursue additional opportunities in downtown region
- Host networking events in and around Olean:
 - Informational & helpful – not intended to be the “hard sell”
 - Target groups that align with the businesses ideally suited for Olean
- Promote historic infrastructure for new commercial attractions:
 - Railroad or oil history-themed restaurant or bar
- Create opportunities for residents to “fund” the cause:
 - Option to “Round Up” their utility bills to nearest dollar
 - Revenues go into grants to help downtown/merchants renovate façades
 - Grants \$1 reimbursement for every \$2 invested by business owner
 - Cap grants at maximum per project



Advertising

- **Establish a co-op advertising program** where Olean businesses can seek reimbursement through city programs, grants and other funding sources to promote and improve their business as an individual that is a part of the greater whole.
 - Funding support for:
 - Advertising support
 - Landscaping / exterior façade beautification
 - Signage guideline adherence
 - Separate into two classification categories with different standards / thresholds:
 - Industry / Commercial Business
 - Retail / Consumer / Small Business
- **Print advertisements** in local, regional and national publications relevant to target audiences:
 - Focused on tourism and regional visitors
 - Focused on surrounding areas – Buffalo, Rochester, Niagara Falls, Ellicottville, Bradford, Erie, Jamestown, Warren
 - Centered in Olean as well
- Tourism booklets, Travel Guides, Hunting / Sportsmen's Guides:
 - New York State Guides
 - Pennsylvania State Guides
- Key business resources:
 - Business publications and websites
 - Tradeshows
 - Chamber of commerce
 - Business real estate
- Billboard advertisements on I-86 access to / from Olean and areas farther away:
 - Promote events, business/industry, quality of life
- Paid ads on social media outlets such as Pandora, Internet Radio, Facebook, YouTube
- Radio spots:
 - Local New York & Pennsylvania region
- Television spots:
 - Local New York & Pennsylvania region
 - Could be web-only pieces:
 - Utilize the already produced [Video tour book](#) to promote further on YouTube, social media and use on individual business sites



Direct Mail

- Target audiences through direct mail postcards and expanded/foldout mailers
 - Focused on community, quality of life, tourism (ecotourism) and more
- Mailers can be targeted to:
 - Specific zip codes within short trip range
 - Specific zip codes out of state with affluent income levels
 - Specific mailing lists for
 - Industry and business
 - Groups identified as having an association or interest in related adventure/nature hobbies
 - Prospective students and families for large regional education institutions

Collateral Materials

- Brochures, pamphlets and more can be created for use at all local businesses, attractions, restaurants, St. Bonaventure and lodging points
- Travel and Visitor centers:
 - AAA
 - NYS and PA Thruway System stops
- Hunting/Fishing/Trails/Outdoors/Nature guides and materials



Public Relations

- Develop ongoing public relations articles and positive events and activities to promote tourism offerings and happenings
- Build on short-term - even small successes – and make them known. It may continue to wash over target audiences until one day they take notice or are ready to listen because what you offer is what they now want
- Properly respond to inquiries about activities and events
- Maintain and develop relationships with travel, recreation and business writers and editors
- Compile and manage an editorial calendar to ensure a consistent stream of news in key media:
 - Write and submit articles/pieces for industry and trade publications to showcase Olean's community-wide offerings, recreation, success stories and available opportunities
- Create an annual promotional calendar of events to coordinate and publicize information on all existing city events and activities
- Create a PR program for downtown, retailers and business community:
 - Allow smaller businesses access to PR resources for major announcements
 - Alerts for events or promotions

Social/New Media

- Facebook, LinkedIn, Twitter, Instagram, YouTube, Four Square and other online social media sites can be utilized to expand reach in ways that are more personally relevant to audiences
- These interactive and inexpensive platforms should become a greater part of Olean's marketing efforts
- Some of the benefits of utilizing social media marketing include:
 - Enhanced customer engagement
 - Increased visits
 - Brand-building
 - Sharing of progress
 - Expanded promotion of existing events
 - Instant news availability



Community Events & Sponsorships

- Events and celebrations give residents a way to celebrate their community, but also draw tourists and promote the advantages of living in Olean.
- Give residents a sense of community and visitors a reason to come to town – ideally for visits that extend into two or more days, thus requiring lodging or stayovers
- Create opportunities for face-to-face interaction with the public
- Obtain and retain positive publicity
- Continue building on established events such as Rally in the Valley, Olean Gus Macker, Fourth of July River Regatta, Outdoor & Rec show, Taste of Olean
- Create one major revenue generating event that is used and promoted as a fundraiser for marketing downtown and / or the area, or a specific community purpose – such as downtown building façade renovations
- Create new events seeking to bring residents and visitors to Olean:
 - Gear events toward various interests, age groups and historic ties to Olean, including:
 - Oil Run (5K) – Oil Slick Challenge:
 - Oil “slicks” and other obstacle challenges (Tough Mudder style)
 - Run through downtown and other areas of the city
 - The Enchanted 5K:
 - Run through Allegheny Nature Trail and Park
 - Sponsorships from local and surrounding businesses
 - Olive Oil and artisan bread tasting / wine event:
 - “Celebrating Olean’s Oil Heritage with some Fine Oil you can Drink”
 - “We have Oil-Refined Tastes”
 - Oil Painting Art Exhibit – Sales Show – “You Paint It” event:
 - “The event where it’s okay to get paint all over yourself”
 - Oil-Petroleum Fuel Antique Show and Expo – celebrating our heritage and thirst for everything oil related:
 - Globe-style gas pumps, collectable oil cans, gas / auto advertising signs, and more
 - Play off the Latin root for Olean’s name – Oleum – with an “Ole-Yum” Festival:
 - Food street fair celebrating all the vibrant and diverse heritage
 - All old-world heritage foods (which differs from Taste of Olean)
 - Timber logging related event with chainsaw skill competitions, carvings, woodcraft / art sales, beer tent, etc.
 - Create an “Industrial Strength” event:
 - Strong man events (tug of war, lifting huge tires, tossing industrial objects)
 - Challenge to build the strongest / toughest soapbox derby car (and race)



- Challenge to build the strongest / toughest demolition derby vehicle
- 2-day Geocache through Rock City Park and Allegheny River Trail:
 - Plant course and clues throughout the City of Olean
 - Invitations through E-mail blasts, social media and local and surrounding area newspapers
- “The Rock City Rock Out” or “Olean Rock City” – Music Festival:
 - Local band competition
 - Secure regional or national acts
 - Stage in various locations around Olean to showcase area
- “Enchanted Mountain Jamboree” – Music Festival
- Classic Car Cruises or Car-B-Q events:
 - Have a major event at the beginning and end of the summer season on downtown North Union
 - Cars-BBQ-Beer – Gatherings for Meet & Meat
- Enchanted Art Festival:
 - Bring in renowned artists or student artists from local university / college / schools to paint / chalk various scenery throughout Olean
 - Judging based on artistic skill level (including the public and kids)
 - Local food vendors, music
- Buy / Support Local Events or Campaign:
 - Farmers’ market or local-produced crafts / art / goods
 - Close off part of downtown to pedestrians only
 - Help offset sales leakage to larger urban centers and online shopping
- Creek Canoeing Regattas
- Fishing Derbies along Allegheny River and Olean Creek
- Deer or Game Hunting Contests – followed by a hunter appreciation dinner:
 - Teach and support hunting safety and conservation
 - Make hunters from outside the area want to hunt, stay and spend their time and money here
- Bus tourists or shoppers in for special 1 or 2-day trips:
 - Offer special discounts and group rates on food, lodging, events and more
- Sponsored Little League Baseball or Little Loop Football tournaments at Bradner Stadium:
 - Weekend long tournaments featuring regional teams
- Seek out and entice NYS groups / associations to hold their annual events here (which as part of their bylaws must be held somewhere in the State)



Signage

- Gateway feature signage – improvements when entering into Olean from various points.
- Use a consistent, theme-branded design. Include some type of gateway signage at all entry points into the City, and depending on budget, some gateway signs could be impressive tone setters, and quite grand in stature. Potential locations for major signage could include:
 - o Buffalo Street from I-86
 - o Route 417
 - o NY 16
- Improve cross community signage promotion with nearby locations:
 - o Ellicottville
 - o Jamestown
 - o Bradford, Warren, Erie
 - o Near area casinos
- Wayfinding signage - improvements throughout the downtown central core leading visitors to other key offerings and attractions:
 - o Increase vehicle and foot traffic through the business district
 - o Improve cross promotion of other nearby offers visitors may not be aware of when visiting for a specific reasons / attraction
- Wayfinding signage visible from expressway / interstate routes into Olean

Industry / Trade Show Attendance

- Although some trade shows are by special invite only, attempt to attend regional and national shows geared toward specific industry and business that would be a good fit for Olean
- Recruitment trips

Local Business Communications

- Keep our closest allies and ambassadors informed, positive, sharing and collaborative
- Cross-business / attraction promotion signage and branding usage
- E-blasts
- Newsletters
- Blog(s)



Consumer Frequency Program

- Develop a consumer frequency “downtown” or “tourist” program focused on key restaurant, retail or attractions
- Scan cards to earn points and redeem bucks or discounts
- Display participation at every venue
- Tie to incentive program

Public Education Sessions

- Keep the public informed and educated – and seek acceptance and buy-in:
 - Take it to the people – either piggybacking on existing events or creating new ones
 - Don't just expect people to come to City Hall
- Host a “Brownfield Education” forum to educate residents and businesses:
 - Seek to overcome worries and perceptions of environmental concerns
 - Remove stigma of older industrial areas or “black forests” that should be avoided
 - Outline the progress
 - Inform what concerns / areas DEC is addressing
 - Invite and include as participant speakers some industrial owners / neighbors that can speak to their experiences working in and around these type of spaces

Testimonials & Success Stories

- Utilize and promote a few key local business success stories that show, “It works here.”
- Capture and promote visitor testimonials touting the historical, tourism and City offerings
- Testimonials can be utilized on the web, in ads, on mailers, social media and in public relations efforts
- Capture testimonials through traditional means / requests, as well as:
 - On websites through webcams
 - Submit your own videos through social media
 - Create your own at video kiosks located through the area
 - Hire a basic video / audio team to wander key events and tourist attractions to capture the testimonials of visitors or guests as they are experiencing or leaving the attraction:
 - People are more apt to share their testimonial experience while “in the moment” – the excitement is still fresh and their reactions are real
 - Individuals who give a testimonial can receive a simple giveaway, redeemable coupon, discount, etc.
 - Keep, use and promote only those testimonials that are the best



Overall Budget (General)

- To be determined by client
- Funding sources to include State resources (ongoing Brownfield phases, etc), grants, local government budgets for promotion, etc.

Recommended Budget Focus (Phase 1)

Promotions / outreach on attracting new industrial business:

- **30%** outreach sales package / kit promoting the BOA properties
- **25%** web communications / online advertising
- **20%** signage / roadside
- **10%** local / regional advertising
- **10%** national advertising / mailings
- **5%** forums / trade shows

Recommended Budget Focus (Phase 2)

Promotions / outreach focused on community, quality of life and attracting/improving retail business:

- **50%** web communications / online advertising
- **25%** beautification / signage / façade improvements
- **15%** local / regional advertising on overall Olean community (place to live / work / play)
- **5%** media / promotions on ecotourism and attractions
- **5%** forums / trade shows



VI. Marketing Plan Objectives

Marketing and promotion efforts should begin on some level as soon as marketing / promotion funding is established. Branding development, as well as “LAND AVAILABLE” related tactics – including I-86 signage and / or billboards, micro website and Developer / Investor kits should begin as soon as possible. All other Phase 1 tactics should be incorporated within the coming year.

Short-term success – however small – can build long-term momentum. Demonstrate success as it happens. Showing success with “low-hanging fruit” shows that change is afoot and there is reason for optimism and an incentive to join in the process.

Beyond this, Phase 2 activities can begin at the beginning of 2015 and beyond, building as slowly or quickly as allowable by time, resources and budget. Tactics could also begin immediately to work in concert with any current marketing efforts for downtown, etc.

Baseline and follow up research and surveys should be considered to accurately track progress and awareness saturation.



Olean, New York:
Land of Industrial Opportunity.

Prime Industrial Land

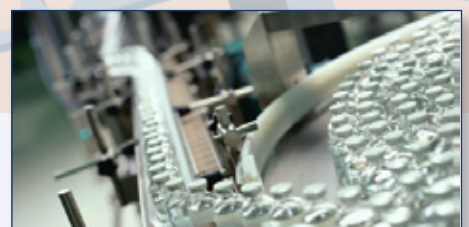
NOW

AVAILABLE



- Over 150 acres of open land available for development
- Utility & infrastructure access in place
- NYS Brownfield incentives, credits & tax breaks

Join Olean's Industrial Evolution today.



Find Your Industrial Solution in Olean.

Come grow your operations in Olean, New York, your industrial-strength business opportunity.

The City of Olean is positioned for change as numerous industrial properties bring wide availability and opportunity for large areas of prime industrial spaces.

Located in the Northeast United States, South of Buffalo, minutes from Pennsylvania and less than 100 miles from the Canadian border. Olean features available sites that are all ideally situated directly off of a major interstate and two key rail lines, with close proximity to an international airport.

More than 120 million people reside in a 500 mile radius of its beautiful home in the Southern Tier, including 50 percent of the United States population and 62 percent of Canada's population.



The Site of Success. Yours.

In Olean, industry is welcomed with open arms with a development friendly government, a team-driven public-private spirit and a dedicated community base raised on generations of attributes that drive industry and business: dedication, grit and work ethic.

Highlights of a community ready to support your business success include:

• General

- Over 150 acres of open land available for development in the Northwest Quadrant
- Utility & infrastructure access in place (water, wastewater, electric, gas, telecom)
- "Certified Clean" technology and amenity access
- Hardworking, trainable workforce
- Local colleges & educational facilities

• Transportation Access & Proximity

- Major thoroughfare access from I-86
- Gateway to midwestern cities & Pennsylvania
- Rail access at the nexus of two key rail lines (Southern Tier Extension and Buffalo Line)
- Major international airport (Buffalo; 60 miles away)

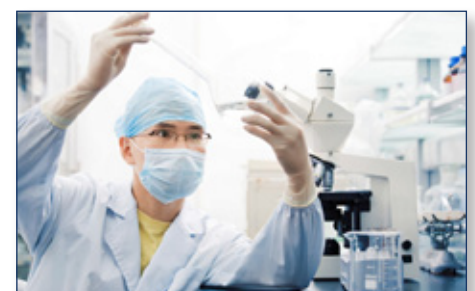
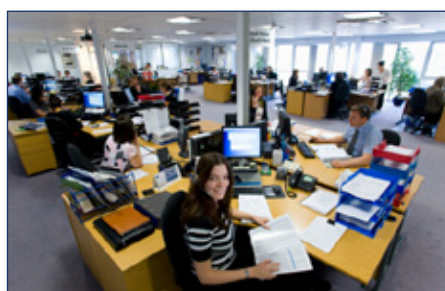


• Credits & Support

- Advanced involvement with New York State's Brownfield Opportunity Area program
- Available incentives, credits, deferments & tax breaks
- EPA/DEC credits & support

• Community / Quality of Life

- A safe, small-town community with low crime
- Rural, open setting outside of the central city core
- Quality public schools and nearby higher education institutions of distinction
- Excellent hospital and medical offerings
- Wide range of attractions, parks and arts
- Four season recreation



Your Space to Operate:

The growing Olean Barrel District aspires to be a nationally-competitive employment center, providing high quality jobs across a diverse base of industry, manufacturing and technology:

- Advanced manufacturing
- Distribution / processing
- Warehousing
- Professional services
- Urban agriculture / agribusiness
- Heavy / commercial industry
- Clean industry
- Light manufacturing
- Durable goods manufacturing
- Medical manufacturing
- Gas and oil, including support
- Wholesale
- Office / business management
- Call centers
- Training centers / technical training

We recognize and embrace our industrial legacy, while looking forward to a future forged on clean, modern industry built through innovation, hard work and community spirit.



Olean New York, Land of Industrial Opportunity.

Join Olean's Industrial Evolution Today.

Learn more at www.BarrelDistrict.com

Contact each site owner for details
or your central contact:

Mary George
City of Olean
Department of
Community Development
716-376-5648
mgeorge@cityofolean.org







Prime Industrial Land Now Available

716-376-5648 • www.BarrelDistrict.com



Site Details

DESCRIPTION:

Vacant site comprised of two parcels. Located on the west edge of neighboring business Dresser-Rand. One of the best opportunities in Olean's Northwest Quadrant for redevelopment. Relatively flat, open and large. Visibility to the site from Buffalo Street is excellent, creating a possibility for commercial or mixed uses along the frontage.



LOCATION:

1404-1406 Buffalo Street
and 1420 Buffalo Street

SITE SIZE:

24.7 Acres

CERTIFICATIONS:

Enrolled in the NYS Brownfield Cleanup Program (2009). This site is currently being remediated.



SITE ACCESS:

Excellent access off Buffalo Street with potential for a four-way intersection at Constitution Avenue.

CURRENT ZONING:

Industrial

INFRASTRUCTURE / UTILITIES:

- List
- List
- List
- List



DISTANCE TO AIRPORT:

60 miles to Buffalo (BUF);
numerous regional airports/airfields



RAIL ACCESS:

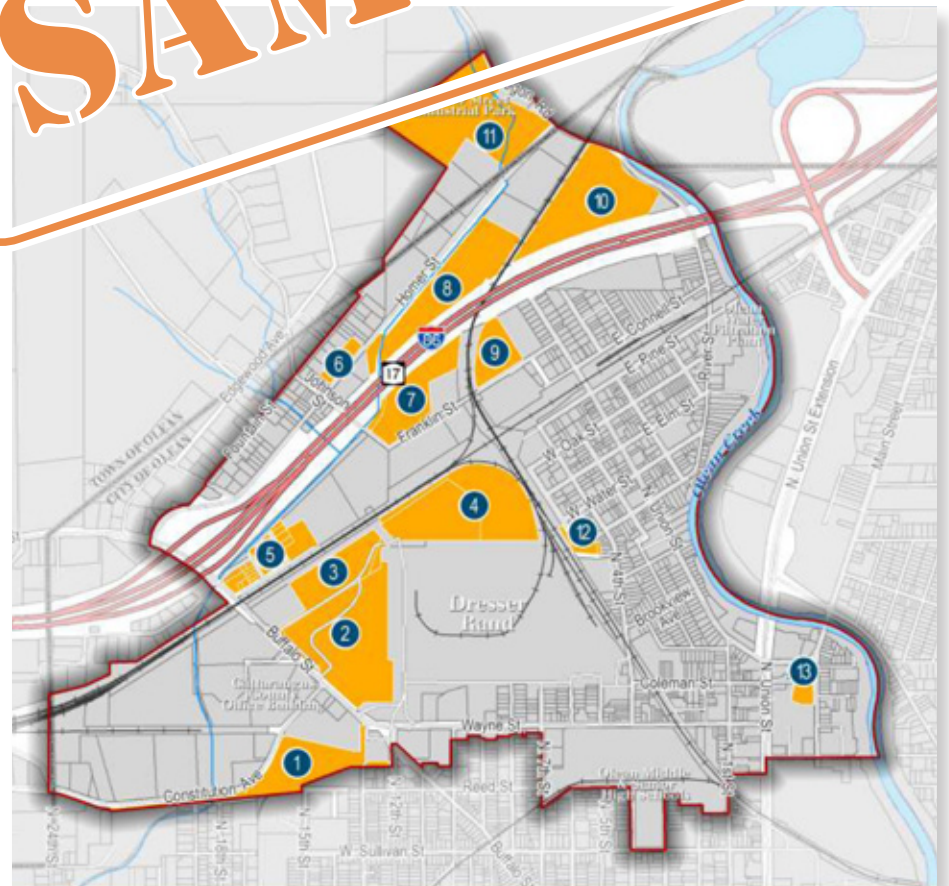
Freight rail line runs nearby; Possibility for a spur line to extend to this property

OWNERSHIP:

Former Agway Nitrogen Complex Site



SAMPLE



Olean: Land of Industrial Opportunity.

OWNER CONTACT:

First Last Name
Title

555-555-5555

contact@ownername.com

OLEAN CONTACT:

Mary George

Department of Community Development

716-376-5648

mgeorge@cityofolean.org



Site Details

DESCRIPTION:

Vacant site. Located in Olean's Northwest Quadrant northeast of Buffalo Street and south of the nearby railroad tracks. Relatively flat, open and free of encumbrances.



LOCATION:

1470 Buffalo Street

SITE SIZE:

9.2 Acres

CERTIFICATIONS:

Enrolled in the NYS Brownfield Cleanup Program (2009). This site is currently being remediated.



SITE ACCESS:

No public road frontage; access currently would need to be provided through adjacent parcel to the west.

CURRENT ZONING:

Industrial

INFRASTRUCTURE / UTILITIES:

- List
- List
- List
- List



DISTANCE TO AIRPORT:

60 miles to Buffalo (BUF); numerous regional airports/airfields

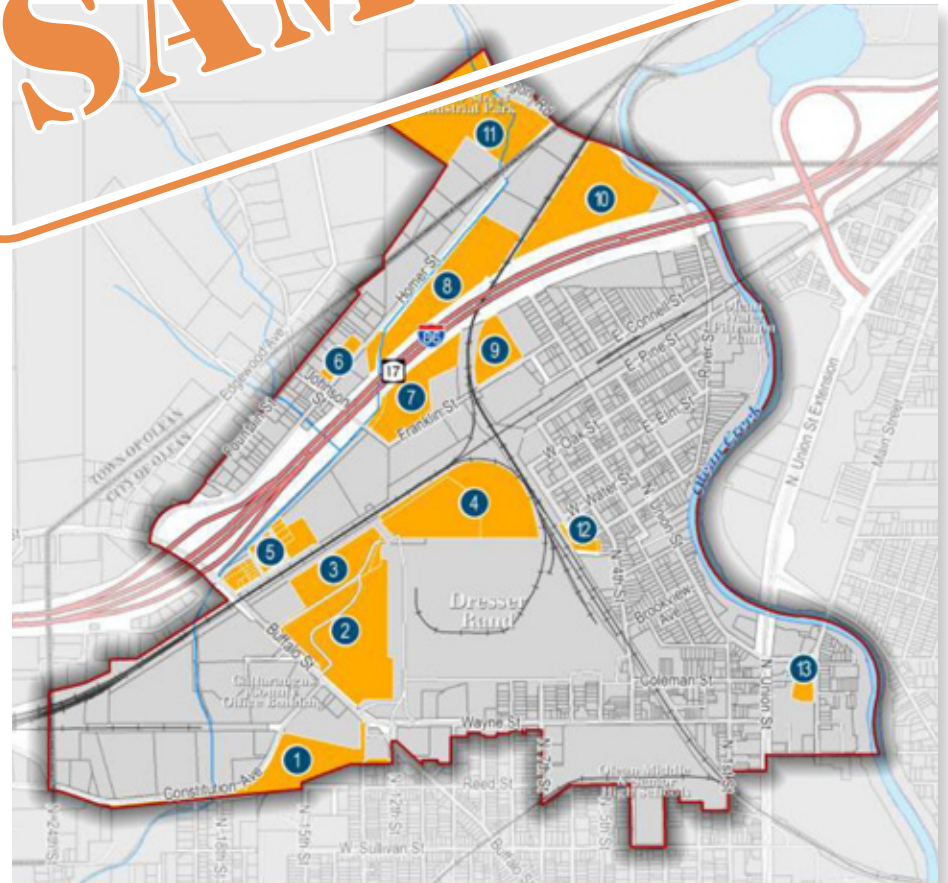


RAIL ACCESS:

Located along a major freight rail line; possibility for a siding or spur line

OWNERSHIP:

Former Felmont Oil Site



Olean: Land of Industrial Opportunity.

OWNER CONTACT:

First Last Name
Title

555-555-5555

contact@ownername.com

OLEAN CONTACT:

Mary George

Department of Community Development

716-376-5648

mgeorge@cityofolean.org



Site Details

DESCRIPTION:

Vacant, flat, open grassland; located on the west and north sides of All Weather Self Storage, across Franklin Street from Valley Tire Company. Although a small stream runs through the northwest corner of the site, it is contained in a steep channel preventing the site from being in the 100-year flood zone. Good visibility from the nearby I-86.



LOCATION:

350 Franklin Street

SITE SIZE:

9.8 Acres

CERTIFICATIONS:

- List
- List



SITE ACCESS:

Access near an exit from the I-86 expressway, which runs along its northern edge; Buffalo Street interchange off the I-86 is approximately 0.5 miles away via the Johnson Street underpass, providing good truck access.

CURRENT ZONING:

Industrial

INFRASTRUCTURE / UTILITIES:

- List
- List
- List
- List



DISTANCE TO AIRPORT:

60 miles to Buffalo (BUF); numerous regional airports/airfields



RAIL ACCESS:

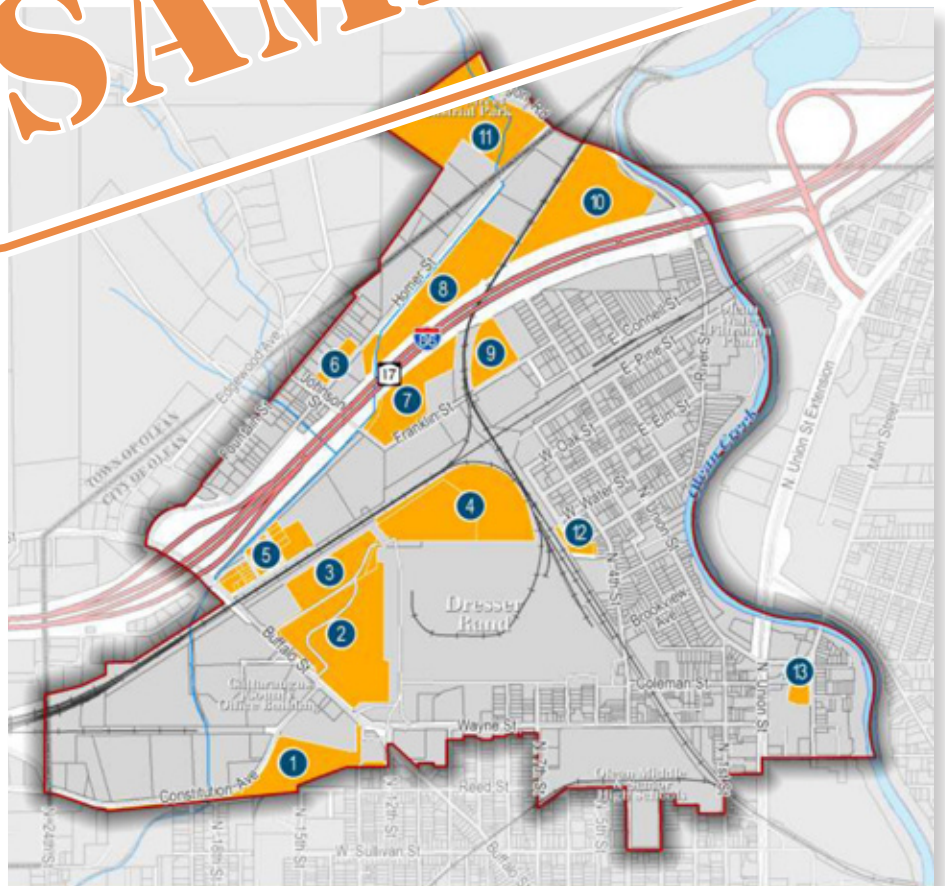
No direct access

OWNERSHIP:

Franklin Street Vacant Lot



SAMPLE



Olean: Land of Industrial Opportunity.

OWNER CONTACT:

First Last Name
Title

555-555-5555

contact@ownername.com

OLEAN CONTACT:

Mary George

Department of Community Development

716-376-5648

mgeorge@cityofolean.org



Land of Industrial Opportunity



OLEAN

AVAILABLE



716-376-5648

Industrial Space/Land

- **18.9 Acres**
- **Utility & Infrastructure Access**
- **Incentives & Credits Available**

www.BarrelDistrict.com

SAMPLE INTERSTATE BILLBOARD

AVAILABLE Industrial Space/ Land



OLEAN, NY

- **Over 150 Acres**
- **Utility & Infrastructure Access**
- **Incentives & Credits Available**

716-376-5648

CITY OF OLEAN BROWNFIELD OPPORTUNITY AREA

**TARGET INDUSTRY ANALYSIS,
BUSINESS RECRUITMENT STRATEGIES, and
ORGANIZATIONAL RECOMMENDATIONS**

Prepared For:

The City of Olean NY

November 2013



HERRON CONSULTING LTD
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Atlanta, Georgia 30309
www.HerronConsultingServices.com

City of Olean Brownfield Opportunity Area Target Industry Analysis, Business Recruitment Strategies and Organizational Recommendations

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TARGET INDUSTRY ANALYSIS

CITY OF OLEAN BROWNFIELD OPPORTUNITY AREA (BOA)

Vision for the Olean BOA

“The Olean Northwest Quadrant Revitalization Area aspires to be one of the region’s nationally competitive employment centers, providing high quality jobs across a diverse base of advanced manufacturing and technology. The following strategies are core to the success of this vision:

- *Remediate and reuse brownfield sites for their highest and best use as determined by their location, market conditions, and community input.*
- *Establish a regulatory framework consistent with New York State Smart Growth Principles, allowing for the efficient review and approval of development while ensuring a high quality built environment.*
- *Stabilize neighborhoods in the study area by investing in infrastructure, infusing housing types attractive to a range of ages and incomes.*
- *Advance design principles supportive of health living and high quality of life, including a safe and connective street system with pedestrian facilities that support non-motorized trips to employment, downtown and recreational resources.”*

Introduction

The Vision Statement provides a clear understanding of the goals Olean wants to achieve in the Northwest Quadrant Revitalization Area in the future. The Olean BOA has a diverse base of industries, a strong employment base and other assets from which to grow. These underlying fundamentals provide a solid base from which the BOA can undergo revitalization and achieve economic development growth, added investment, and increased jobs in the future.

Additionally, the BOA benefits from the many diverse stakeholders from the community, county and the state that are interested in helping the BOA realize its vision.

One of the best means Olean and its stakeholders can undertake to increase its economic and employment base is to recruit new industries and jobs to the BOA, retain the businesses that it has and support internal expansions and entrepreneurial growth. The latter is of utmost importance because oftentimes 70% or more of new jobs and investment in an area comes from internal expansions.

Target Industries

Recruiting new industries and retaining and growing existing industries are the foundation of economic development. In order to achieve this in Olean, a targeted, focused approach must be implemented. Undertaking a targeted approach will ensure that the industries that are most likely to find the community and BOA competitive and attractive, with the greatest likelihood of responding to marketing and industry recruitment programs, are the focus of attention.

This target industry analysis identifies those industries that the City of Olean should target for jobs and investment in the City of Olean BOA in the future. Herron Consulting, a sub consultant to Bergmann Associates, completed this target industry analysis and its recommendations. We conducted this analysis from the perspective of a corporate site selector, drawing upon our industry knowledge and experience obtained from conducting site selection programs for manufacturing, headquarters and office operations, life sciences, warehousing/distribution and other industries, and working with communities on economic development strategies.

In this analysis, we:

- Evaluate the current industry mix (industrial base) in the City of Olean, Cattaraugus County, and the five-county region studied by Camoin Associates in the Market Analysis. The counties in the region are Chautauqua, Cattaraugus and Allegany in New York and Mercer and Potter in Pennsylvania. The industries in the City, County and region will provide the foundation for the local economy, and are reflected in the data that investors typically will review before making their investment decisions.
- Assess the appropriateness of other industries for targeting for jobs and investment, considering location quotients, location criteria, growth rates, wages, diversification possibilities, skill requirements, new economy orientation, export base, and the types of companies currently located in the community.
- Embrace those industries that are reflective of the “Vision for the Olean BOA.” De-emphasize those industries, such as chemical manufacturing and oil and gas related industries, we believe are not appropriate for the BOA due to noise, type of industry, lack of appropriate buildings and sites, environmental concerns, etc.
- Identify four target industry clusters that the City of Olean should focus on as preferred targets to achieve enhanced growth and development in the BOA in the future. Each cluster is composed of several recommended individual industries, defined by NAICS code.
- Analyze why each cluster was selected and why the City of Olean BOA is a good fit for economic development and marketing purposes.
- Identify realistic target industry recruitment strategies for the City of Olean and stakeholders to implement to attract the recommended target industries to the BOA.

An overview of our findings and recommendations are included in this report.

Data Source and the City of Olean BOA

Economic Modeling Specialists, Inc. (EMSI) is the primary source of data used in the target industry analysis. EMSI is the same data provider referenced and used by Camoin Associates in the City of Olean Brownfield Opportunity Area (BOA): Market Analysis. The EMSI Complete Employment Data Set are based upon information from several government sources, including the most recent data compiled by the U.S. Census Bureau, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis, U.S. Department of Health, and the New York Department of Labor. EMSI uses specialized proprietary processes and models to estimate current statistics

and predict future trends. It is unique because the employment data generated includes the self-employed, part-time and seasonal workers.

For the purposes of the target industry analysis, zip code 14760, the zip code for the City of Olean which encompasses the BOA, is the most appropriate geography for analyzing the industrial base and recommending target industries and clusters.

Industry Mix

It is important to understand the industry mix in the City of Olean BOA, Cattaraugus County and the five county region because these form the foundation for the target industry analysis and recommendations.

The table on the following page shows the total number of employees who work in the City of Olean BOA, Cattaraugus County and the region, and provides specifics about the industrial composition of these businesses. The data are for 2013, the most recent year for which statistics are available.

Over 13,800 are employed in City of Olean BOA. Government is the largest employer, providing jobs to 20%, followed by manufacturing, 18%; retail trade, 17%; and health care and social assistance, 15%.

In Cattaraugus County, 31,760 are employed in the county. Once again, government is the largest employer, with over 31% working in government jobs. The next largest employment sectors are retail trade, nearly 13%; manufacturing, 11.4%; and health care and social assistance, 11.2%.

Nearly 127,240 work in the five county region. As in the Olean BOA and Cattaraugus County, government is the largest employer, providing jobs to over 21%. Like Olean, the sector with the next highest employment is manufacturing which employs over 15% of employees in the region. The next largest employment sectors are health care and social assistance, 13.5%, and retail trade, 11.5%.

Industries in the BOA, Cattaraugus County and the Region, 2013

NAICS	Industry	Olean BOA		Cattaraugus County		Region	
		Employees	% of Total	Employees	% of Total	Employees	% of Total
11	Agric, Fishing, Forestry*	15	0.1%	484	1.5%	2,012	1.6%
21	Mining, Quarrying	14	0.1%	113	0.4%	1,588	1.2%
22	Utilities	48	0.3%	94	0.3%	548	0.4%
23	Construction	241	1.7%	1,020	3.2%	5,109	4.0%
31-33	Manufacturing	2,511	18.2%	3,614	11.4%	19,332	15.2%
42	Wholesale Trade	364	2.6%	703	2.2%	2,601	2.0%
44-45	Retail Trade	2,381	17.2%	4,052	12.8%	14,622	11.5%
48-49	Transportation & Warehousing	171	1.2%	463	1.5%	2,657	2.1%
51	Information	168	1.2%	229	0.7%	1,493	1.2%
52	Finance & Insurance	425	3.1%	694	2.2%	2,348	1.8%
53	Real Estate	190	1.4%	260	0.8%	1,119	0.9%
54	Prof., Scientific & Technical Services	275	2.0%	628	2.0%	2,552	2.0%
55	Management Co. & Enterprises	200	1.4%	202	0.6%	663	0.5%
56	Admin Support, Waste Mangt., Remediation Services	290	2.1%	641	2.0%	4,335	3.4%
61	Education Services, Private	77	0.6%	970	3.1%	5,143	4.0%
62	Health Care & Social Assistance	2,082	15.1%	3,546	11.2%	17,147	13.5%
71	Art, Entertainment, & Recreation	39	0.3%	283	0.9%	1,352	1.1%
72	Accommodations / Food Services	899	6.5%	2,422	7.6%	9,488	7.5%
81	Other Services	609	4.4%	1,370	4.3%	5,748	4.5%
90	Government	2,794	20.2%	9,931	31.3%	27,262	21.4%
99	Unclassified	14	0.1%	41	0.1%	120	0.1%
	TOTAL	13,807	100.0%	31,760	100.0%	127,239	100.0%

* Agricultural employment data includes the self-employed, part-time and seasonal workers, and over-counting may result.

Source: EMSI Complete Employment Data

RECOMMENDED TARGET INDUSTRIES AND CLUSTERS

HERRON CONSULTING recommends specific target industry sectors for the BOA that the City of Olean should pursue to bring new jobs and investment to the community and the BOA. The industries are grouped into four clusters, based upon synergies between the target industry sectors. The recommended target industry clusters and sectors are:

- **Advanced Manufacturing**
 - Resin, Synthetic Rubber and Synthetic Fibers
 - Custom Compounding of Purchased Resins
 - Architectural and Structural Metals
 - Machine Shops
 - Other Fabricated Metal Products
 - Other General Purpose Machinery
- **Distribution and Warehousing**
 - Wholesale Trade, Durable and Non-Durable Goods
 - Warehousing and Storage
- **Professional Services/ Entrepreneurial Networked Professionals**
 - Management, Scientific, Technical Consulting Services
 - Other Professional, scientific, Technical Services
 - Management of Companies and Enterprises
- **Urban Agriculture/ Agribusiness**
 - Sugar and Confectionary Products
 - Fruit and Vegetable Preserving and Specialty Foods
 - Dairy Products
 - Bakeries
 - Other Food Products
 - Wineries

In addition to focusing on these target industries, Olean needs to take additional steps to develop and maintain quality of life amenities that make the community an attractive location for the target industries and other employers, residents and visitors. Examples of quality of life amenities are retail stores, restaurants, lodging facilities, recreational amenities and the performing arts.

REASONS FOR INDUSTRY TARGETS AND WHY THE OLEAN BOA IS A GOOD FIT

The foundation for this target industry analysis and recommendations is the confidential interviews Herron Consulting conducted with local stakeholders; public workshops in January 2013; the City of Olean Brownfield Opportunity Area (BOA): Market Analysis, completed by Camoin Associates; research; and data analysis. We also reviewed public documents, including the Greater Olean Area Chamber of Commerce Membership Directory, the Buffalo Niagara 2013 Economic Guide, completed by the Buffalo Niagara Enterprise; and the Industry Clusters in New York's Economy: A Statewide and Regional Analysis, completed by the New York State Department of Labor in October 2012. These provided the understanding of the City of Olean, Cattaraugus County and the region that we relied upon when identifying appropriate target industries.

Target Industry Criteria

The selection criteria used to identify the recommended target industries and clusters for the Olean BOA consider the following.

- **Location Quotients:** Indicator of the relative goodness-of-fit concentration of specific industry sectors in the Olean BOA, Cattaraugus County and the five county region. We evaluate location quotients based on sector employment in 2013 in existing industries, (i.e., Dresser Rand, Sol Epoxy and Cytek, etc.), the most recent year for which comparable statistics are available. A location quotient greater than 1.0 indicates the specific industry is generally more concentrated (employs a greater proportion of the workforce) than in New York State and/or the US. See Location Quotient table at the end of this section.
- **Local Presence:** Takes into consideration the types of industries that have started operations, but which are not reflected in the EMSI data.
- **Local Demand:** Supports demand for goods and services by local industries that are currently being supplied by companies outside the community.
- **Location Criteria:** How well the locational criteria of the industries match up with Olean's identified strengths and competitive advantages.
- **Growth Trends:** Past growth and likely future growth of the industry. We recommend industries we believe will grow in the future, after recovery from the sustained downturn in the local, national and global economy subsides.
- **Diversification of Existing Industry Base:** Targets must reflect a mix of diversified but synergistic industries which will bring new investment to Olean and the BOA, and help position them for even greater investment by other industries.
- **Wages:** The target industries should offer high value-added jobs with good wages.
- **New Economy:** The recommended industries offer opportunities for Olean to target industries that rely on technology; are new economy-oriented; and are heavily dependent on communication, networking and collaboration.

- **Export Industries:** The recommended target industries should export products and services to markets outside Olean and bring new wealth into the community.

The North American Industrial Classification Systems (NAICS) is the system used by the Federal statistical agencies for classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the US business economy. NAICS was developed by the Office of Management and Budget, and replaced the Standard Industrial Classification (SIC) system in 1997. It was jointly developed by the government agencies in Canada and Mexico so that there is a high degree of comparability in business statistics in the three North American countries.

NAICS codes are provided for the target industry sectors recommended for the Olean BOA.

RECOMMENDED TARGET INDUSTRY CLUSTERS AND SECTORS

The table which follows, Recommended Target Industry Clusters and Sectors, provides examples of products and/or services for each recommended industry sector and describes the supportive strengths for the industry in the City of Olean and the BOA.

Recommended Target Industry Clusters and Sectors for the Olean BOA

Target Industry Cluster and Sectors	Products / Services Examples	Local/ Regional Supporting Strengths For Advanced Manufacturing Cluster
1. Advanced Manufacturing		
<ul style="list-style-type: none"> Resins, Synthetic Rubber and Synthetic Fibers, NAICS 3252 	Plastics materials and resins	Target industry of New York State and Buffalo-Niagara MSA
<ul style="list-style-type: none"> Custom Compounding of Purchased Resins, NAICS 3259 	Custom compounding of resins to make epoxy and other products	Growing base of industries to support advanced manufacturing in Olean
<ul style="list-style-type: none"> Architectural and Structural Metals, NAICS 3323 	Sheet metalwork and plate work, including architectural components and parts for ships, bridges, railcars, and reactor vessels.	Productive employees with strong work ethic in local 30 mile radius commute zone
<ul style="list-style-type: none"> Machine Shops, NAICS 3327 	Machine shops and precision turned products	Generates well-paying jobs
<ul style="list-style-type: none"> Other Fabricated Metal Products, NAICS 3329 	Ball and roller bearings, industrial valves, fluid power valves, small arms, pipe, safes/ vaults, foils/ containers	Access to global markets
<ul style="list-style-type: none"> Other General Purpose Machinery, NAICS 3339 	Air and gas compressors	Proximity to markets in US and Canada
		Highway and rail accessibility
		International airport in Buffalo
		Telecom infrastructure
		Existing sites suitable for these industries
		St. Bonaventure, Jamestown Community College and other colleges offer relevant courses/ degrees
		Jamestown Community College customized training and Dream It, Do It program
		Quality-of-life amenities
		County and state economic development incentives
		Machine shops support other manufacturing industries; an asset for business attraction

Target Industry Cluster and Sectors	Products / Services Examples	Local/ Regional Supporting Strengths For Distribution/Warehousing Cluster
2 Distribution and Warehousing <ul style="list-style-type: none"> Wholesale Trade, Durable and Non-Durable Goods, NAICS 42 Warehousing and Storage, NAICS 4931 		
	Industrial machinery, equipment, and supplies; farm equipment and supplies; groceries; clothing; household goods	Target industry of New York State Supports Buffalo-Niagara MSA's logistics target industry
	General, refrigerated and specialized warehousing	Growing base of industries to support distribution and warehousing in Olean Productive employees with strong work ethic in 30 mile radius local commute zone Generates well-paying jobs Access to global markets Proximity to markets in US and Canada Highway and rail accessibility International airport in Buffalo Telecom infrastructure Existing sites suitable for these industries Jamestown Community College offers relevant courses, degrees, and customized training Quality-of-life amenities County and state economic development incentives

Target Industry Cluster and Sectors	Products / Services Examples	Local/ Regional Supporting Strengths For Professional Services/ Entrepreneurial Networked Cluster
3. Professional Services/ Entrepreneurial Networked Professionals		
<ul style="list-style-type: none"> • Management, Scientific, Technical Consulting Services, NAICS 5416 • Other Professional, Scientific and Technical Services (NAICS 5419) • Management of Companies and Enterprises (NAICS 55) • Entrepreneurial Networked Professionals (no NAICS available) 	<p>Management, marketing, logistics, environmental, scientific and technical consulting</p> <p>Marketing research and other miscellaneous services</p> <p>Corporate, subsidiary and regional managing offices</p> <p>Self-employed professionals, small business owners and independent performers. Willing to collaborate with other professionals on large projects. May work from non-traditional settings, including homes. Examples found in business consulting, performing arts venues, festivals and motion picture/video production. Engaged in providing technical expertise. Not included in typical industry paradigms.</p>	<p>Target industry of New York State and the Buffalo-Niagara MSA</p> <p>Productive employees with strong work ethic in 30 mile radius commute zone</p> <p>Generates well-paying jobs</p> <p>Access to global markets</p> <p>Proximity to markets in US and Canada</p> <p>Highway accessibility</p> <p>International airport in Buffalo</p> <p>Telecom infrastructure</p> <p>Colleges, universities, and community colleges offer relevant courses/ degrees</p> <p>St. Bonaventure, Jamestown Community College and other colleges offer relevant courses/ degrees</p> <p>Jamestown Community College offers customized training</p> <p>Quality-of-life amenities</p> <p>County and state economic development incentives</p>

Target Industry Cluster and Sectors	Products / Services Examples	Local/ Regional Supporting Strengths For Urban Agriculture / Agribusiness Cluster
4 Urban Agriculture/ Agribusiness	Specialty and locally-produced food; organics; jams/ preserved products; chocolates; bakeries; dairy products; spices, wineries	<p>Target industry of New York State and the Buffalo-Niagara MSA</p> <p>Responds to “locally-grown” trend which is increasing in importance</p> <p>Support for this industry from local farms, orchards, wineries, specialty food producers, specialty food stores, residents, businesses, colleges and visitors</p> <p>Available work force</p> <p>Supports green tourism industry and is a quality-of-life amenity</p> <p>Access to global markets</p> <p>Proximity to markets in US and Canada</p> <p>Highway and rail accessibility</p> <p>International airport in Buffalo</p> <p>Telecom infrastructure</p> <p>Colleges, universities, and community colleges offer relevant courses and degrees</p> <p>Adaptive reuse possibilities of buildings as they become vacant to urban agriculture facilities and used shipping containers to modular controlled environment sustainable “grow pods” (such as Pod Ponics in Atlanta Georgia (www.podponics.com))</p> <p>Other suitable existing buildings and sites</p>

Goodness-Of-Fit

The following table shows the location quotients in 2013 and 2023 for the selected industry sectors in the Olean BOA, Cattaraugus County and the five county region. Location quotients for the BOA and County have been calculated using existing and projected New York State employment as the base of comparison.

The location quotient for the five county region has been calculated using existing and projected employment in the U.S. as its base of comparison, since it consists of three counties in New York and two counties in Pennsylvania.

Location Quotients for Target Industries, 2013 and 2023

NAICS Code	Industry	Olean BOA State LQ		Cattaraugus County State LQ		Region National LQ	
		2013	2023	2013	2023	2013	2023
ADVANCED MANUFACTURING							
3252	Resin, Synthetic Rubber and Synthetic Fibers	3.41	n.a.	4.39	n.a.	.59	.26
3259	Custom Compounding of Purchased Resins	184.44	n.a.	160.61	n.a.	2.00	n.a.
3323	Architectural and Structural Metals	.73	1.25	.96	1.66	2.55	2.77
3327	Machine Shops	0.0	0.0	0.49	n.a.	1.91	2.40
3329	Other Fabricated Metal Products	7.61	10.61	3.38	4.68	5.22	4.65
3339	Other General Purpose Machinery	53.81	54.59	24.21	24.13	5.36	6.49
DISTRIBUTION / WAREHOUSING							
42	Wholesale Trade, Durable and Non- Durable Goods	.74	.77	.62	.69	.52	.54
4931	Warehousing and Storage	2.35	3.27	1.02	1.43	.15	.16
PROFESSIONAL SERVICES / ENTREPRENEURIAL NETWORKED PROFESSIONALS							
5416	Management, Scientific, Technical Consulting Services	.33	.43	.38	.49	.32	.34
5419	Other Professional, Scientific and Technical Services	.50	.52	.50	.53	.53	.55
5511	Management of Companies and Enterprises	1.03	1.13	.45	.50	.39	.38

Location Quotients for Target Industries, 2013 and 2023 (contd.)

NAICS Code	NAICS and Industry	Olean BOA State LQ		Cattaraugus County State LQ		Region National LQ	
		2013	2023	2013	2023	2013	2023
URBAN AGRICULTURE / AGRIBUSINESS							
3113	Sugar/ Confectionary Products	0.0	0.0	0.0	0.0	.56	.89
3114	Fruit/ Vegetable Preserving/Specialty Foods	n.a.	n.a.	n.a.	n.a.	7.44	7.40
3115	Dairy Products	0.0	0.0	.81	1.12	7.98	8.59
3118	Bakeries	2.65	2.08	1.36	0.92	1.82	1.83
3119	Other Food Products	0.0	0.0	1.05	n.a.	1.68	1.74
3121	Wineries	0.0	0.0	2.88	5.69	1.52	2.21

Source: EMSI Complete Employment Data

The tables on the following page, Recommended Target Industries: Earnings and Jobs, provide:

- Information about the target industry sectors in the Olean BOA, Cattaraugus County, the five county region and New York State, and
- An understanding about why the recommended target industries are selected.

As can be seen, the average earnings, which include benefits, indicate these industry sectors pay good wages. Additionally, employment is projected to increase in many of these industries between 2013 and 2023.

Recommended Target Industries: Earnings and Jobs – Olean BOA

NAICS Code	Industry Description	BOA 2013 Avg. Earnings	2013 Jobs	2023 Jobs	% Change
ADVANCED MANUFACTURING					
3252	Resin, Synthetic Rubber, and Synthetic Fibers	\$111,857	54	n.a.	n.a.
3259	Custom Compounding of Purchased Resins	\$88,839	59	n.a.	n.a.
3323	Architectural and Structural Metals	\$97,295	15	28	87%
3327	Machine Shops	n.a.	0	0	0
3329	Other Fabricated Metal Products	\$76,022	86	118	37%
3339	Other General Purpose Machinery	\$86,455	1,137	1,344	18%
DISTRIBUTION / WAREHOUSING					
42	Wholesale Trade, Durable and Nondurable Goods	\$52,957	364	368	1%
4931	Warehousing and Storage	\$42,895	68	98	44%
PROFESSIONAL SERVICES / NETWORKED ENTREPRENEURIAL PROFESSIONALS					
5416	Management, Scientific, Technical Consulting	\$61,932	38	60	58%
5419	Other Professional, Scientific, Technical Services	\$33,677	37	44	19%
5511	Management of Companies and Enterprises	\$35,632	200	227	14%
URBAN AGRICULTURE/ AGRIBUSINESS					
3113	Sugar and Confectionary Products	n.a.	0	0	0
3114	Fruit and Vegetable Preserving/Specialty Foods	\$14,946	n.a.	n.a.	n.a.
3115	Dairy Products	n.a.	0	0	0
3118	Bakeries	\$53,109	83	64	(23%)
3119	Other Food Products	n.a.	0	0	0
3121	Wineries	n.a.	0	0	0

Recommended Target Industries: Earnings and Jobs – Cattaraugus County

NAICS Code	Industry Description	Cattaraugus County 2013 Avg. Earnings	2013 Jobs	2023 Jobs	% Change
ADVANCED MANUFACTURING					
3252	Resin, Synthetic Rubber, and Synthetic Fibers	\$111,857	54	n.a.	n.a.
3259	Custom Compounding of Purchased Resins	\$88,839	59	n.a.	n.a.
3323	Architectural and Structural Metals	\$97,362	44	85	93%
3327	Machine Shops	\$49,954	24	n.a.	n.a..
3329	Other Fabricated Metal Products	\$75,789	88	120	36%
3339	Other General Purpose Machinery	\$85,619	1,176	1,359	16%
DISTRIBUTION / WAREHOUSING					
42	Wholesale Trade, Durable and Nondurable Goods	\$49,282	703	757	8%
4931	Warehousing and Storage	\$42,895	68	98	44%
PROFESSIONAL SERVICES / NETWORKED ENTREPRENEURIAL PROFESSIONALS					
5416	Management, Scientific, Technical Consulting	\$61,257	100	155	55%
5419	Other Professional, Scientific, Technical Services	\$31,472	86	101	17%
5511	Management of Companies and Enterprises	\$35,632	202	230	14%
URBAN AGRICULTURE / AGRIBUSINESS					
3113	Sugar and Confectionary Products	n.a.	0	0	0
3114	Fruit and Vegetable Preserving/Specialty Foods	\$14,946	n.a.	n.a.	n.a.
3115	Dairy Products	\$33,144	24	33	38%
3118	Bakeries	\$51,056	98	65	(34%)
3119	Other Food Products	\$24,905	22	n.a.	n.a.
3121	Wineries	\$89,380	60	107	78%

Recommended Target Industries: Earnings and Jobs – 5 County Region

NAICS Code	Industry Description	Region 2013 Avg. Earnings	2013 Jobs	2023 Jobs	% Change
ADVANCED MANUFACTURING					
3252	Resin, Synthetic Rubber, and Synthetic Fibers	\$102,121	63	n.a.	n.a.
3259	Custom Compounding of Purchased Resins	\$88,839	59	n.a.	n.a.
3323	Architectural and Structural Metals	\$56,667	757	862	14%
3327	Machine Shops	\$53,062	604	750	24%
3329	Other Fabricated Metal Products	\$70,229	1,234	1,069	(13%)
3339	Other General Purpose Machinery	\$85,525	1,179	1,361	15%
DISTRIBUTION / WAREHOUSING					
42	Wholesale Trade, Durable and Nondurable Goods	\$49,710	2,601	2,804	8%
4931	Warehousing and Storage	\$43,845	86	102	19%
PROFESSIONAL SERVICES / NETWORKED ENTREPRENEURIAL PROFESSIONALS					
5416	Management, Scientific, Technical Consulting	\$53,011	402	538	34%
5419	Other Professional, Scientific, Technical Services	\$30,055	330	391	18%
5511	Management of Companies and Enterprises	\$43,274	663	665	0%
URBAN AGRICULTURE / AGRIBUSINESS					
3113	Sugar and Confectionary Products	\$36,800	32	46	44%
3114	Fruit and Vegetable Preserving/Specialty Foods	\$59,504	1,046	940	(10%)
3115	Dairy Products	\$53,229	935	943	1%
3118	Bakeries	\$46,813	458	437	(5%)
3119	Other Food Products	\$58,992	257	268	4%
3121	Wineries	\$53,481	238	338	42%

Recommended Target Industries: Earnings and Jobs – State of NY

NAICS Code	Industry Description	State 2013 Avg. Earnings	2013 Jobs	2023 Jobs	% Change
ADVANCED MANUFACTURING					
3252	Resin, Synthetic Rubber, and Synthetic Fibers	\$123,446	2,569	2,117	(18%)
3259	Custom Compounding of Purchased Resins	\$75,024	59	n.a.	n.a.
3323	Architectural and Structural Metals	\$62,947	13,869	16,713	21%
3327	Machine Shops	\$60,293	14,694	14,791	1%
3329	Other Fabricated Metal Products	\$72,788	7,828	8,316	6%
3339	Other General Purpose Machinery	\$84,571	14,609	18,358	26%
DISTRIBUTION / WAREHOUSING					
42	Wholesale Trade, Durable and Nondurable Goods	\$87,030	339,580	366,530	5%
4931	Warehousing and Storage	\$51,809	20,163	22,279	10%
PROFESSIONAL SERVICES / NETWORKED ENTREPRENEURIAL PROFESSIONALS					
5416	Management, Scientific, Technical Consulting	\$115,211	79,425	103,140	30%
5419	Other Professional, Scientific, Technical Services	\$58,759	51,003	62,054	22%
5511	Management of Companies and Enterprises	\$165,133	133,866	149,326	12%
URBAN AGRICULTURE / AGRIBUSINESS					
3113	Sugar and Confectionary Products	\$54,900	2,920	2,924	0.1%
3114	Fruit and Vegetable Preserving/Specialty Foods	\$54,512	5,672	4,837	(15%)
3115	Dairy Products	\$64,966	8,777	9,603	9%
3118	Bakeries	\$34,274	21,744	23,007	6%
3119	Other Food Products	\$68,784	6,207	6,018	(3%)
3121	Wineries	\$68,523	6,231	6,128	(2%)

Target Industry Recruitment Strategies

It is important that the City of Olean implement recruitment strategies that build from its strengths to attract the recommended target industries to the BOA. For many regions, post-recession recruitment strategies are receiving renewed emphasis as key components of an economic development marketing plan. The recovering economy portends a very different, less lucrative recruiting landscape, characterized by heightened competition from aggressive cities and states.

Recommended Recruitment Strategies

Herron Consulting recommends the following target industry recruitment strategies. The strategies are realistic and achievable actions that the City of Olean and stakeholders should begin to implement now. They can be included in a comprehensive economic development marketing plan.

Strategy 1 – Expand and Deepen Personal Relationships

Successful marketing programs take advantage of personal relationships.

- Meet with relevant state, regional and local government agency project managers and economic development organizations to inform them about the completion of this study and the recommended target industries the City of Olean intends to pursue for economic growth, new jobs and investment.
 - Promote Olean and the BOA as an appropriate location for expanding and new businesses in the industry sectors.
 - Discuss how Olean can work with them to attract the target industries, and how Olean can become more visible in their marketing and recruitment efforts.
- Engage in similar types of meetings with regional employers, particularly managers of national and global companies.
 - Describe Olean's advantages for their next corporate expansion or relocation, and convey to them that your objective is to assure their business is successful.
 - Ask for their assistance in gaining introductions to their appropriate headquarters staff.
- Meet with industry experts at Empire State Development, Buffalo-Niagara Enterprise, Cattaraugus County Industrial Development Authority, regional utilities, and selected colleges and universities to learn about the State's target industries.
 - These industry experts can be an excellent resource for identifying the trade shows and trade journals which focus on the target industries.

- Solicit their input in identifying industry specific issues that might be considered in developing Olean's collateral material.
- Continue these meetings on a regular (semi-annual) basis. Provide color promotional brochures and collateral materials (see below) to meeting attendees for their information and use.
- Cultivate professional networks by joining/maintaining membership in professional organizations for educational purposes and to develop a network of peers and consultants who are active in economic development. Examples include New York State Economic Development Council, International Economic Development Council, and the Industrial Asset Management Council.

Strategy 2 – Establish an Education And Workforce Committee

- Bring education institutions and local employers together to establish an education and workforce committee which collaborates to improve workforce preparedness, including “soft” skills and lifelong learning
- Meet regularly with key education leaders, education institutions, and local employers since all have a critical role to play in economic development. They must be partners in the process to better support community objectives by ensuring education and training align with employer needs.

Strategy 3 – Engage in Direct Outreach To Decision Makers

- Based on the information obtained and the corporate contacts identified in Strategy 1, implement a direct communication and follow-up program with potential prospects in the target industry clusters.
 - Prospects should include large and small businesses and entrepreneurs. Entrepreneurs have great leeway in making critical decisions that could lead to locating operations in the BOA.
 - Consider offering to pay travel expenses of selected prospects who agree to visit Olean.
- Undertake an outreach program to corporate site consultants, real estate brokers, and other location decision-makers.
 - Outreach should be by mail, phone, e-mail, meetings, and by posting and responding to messages on social media sites, for example, LinkedIn, Twitter and Facebook.
 - Inform them about the completion of this BOA study and the target industries the city intends to pursue for economic growth and diversification and increased jobs and investment in the BOA.

- Learn how Olean can work with them to meet their/clients' needs.
- Continue this outreach on a regular basis.

Strategy 4 – Engage In Shared Activities

- Participate in integrated economic development marketing programs with Empire State Development and other state agencies; Cattaraugus County Industrial Development Authority; Chambers of Commerce and other economic development organizations in the county, region and state; utilities; and other relevant entities.
- Participate in recruitment trips which are sponsored by the state, county, Buffalo – Niagara MSA and others.

Strategy 5 – Enhance Olean's Internet Presence, Print Brochures and Collateral Material

- Update the City of Olean's website with key findings and information from this Brownfield Opportunity Area study, and include a list of the recommended target industries and clusters. Coordinate the logo, colors and message with those on color promotional brochures and collateral materials.
- Actively maintain and update your presence on appropriate social media sites.
- Develop color promotional brochures with pictures that highlight the business climate and the strengths of the City of Olean, the BOA, and the strategic brownfield redevelopment sites; quality of life, and target industries. Make sure the logo, colors and message are consistent with those on the collateral materials and website.
- Prepare other collateral materials, such as fact sheets and maps, which should be used as the starting point to respond to requests in a customized manner. Make sure the logo, colors and message are consistent with those on the website and color promotional brochures.
- Solicit relevant testimonials from local business owners and managers, business organizations, arts organizations, etc. Include these prominently on the community's website and promotional/collateral marketing materials.

Strategy 6 – Continue To Invest In the Community

- Continue to invest in public services and infrastructure (public safety, streets, utilities, green space, etc.) which have the additional "side benefit" of being attractive to business and industry decision-makers.
- Support initiatives to expand retail offerings, especially hotels/ full-service restaurants.
- Support opportunities to develop in-town rental and upscale housing.

Strategy 7 – Produce Special Events

- Host a special event, such as a dinner with an interesting speaker or a tour, and invite selected state and local government officials, regional economic development organizations, business leaders, and consultants. This could grow into an annual event and a means for promoting the community and educating guests about the desirability of the City of Olean and the BOA as a place to work and live.
- Offer to host some of the regularly scheduled meetings of local professional and business associations in an appropriate venue in the BOA.

Strategy 8 – Participate In Trade Shows

- Attend key industry trade shows that are relevant to the target industry clusters for educational, professional development, networking and marketing purposes.
 - Obtain the attendee and sponsor list for a trade show before it begins, if possible, to determine if any are potential target industry prospects or corporate decision-makers that might be interested in the community as a location for their businesses and clients. Send a mailing or e-mail in advance and try to arrange appointments with selected attendees. Enter these into a prospect/contact data base for recruitment and marketing purposes.
 - Walk the floor of the trade show and converse with general participants and exhibitors to keep abreast of industry trends.
 - If the State of New York, Cattaraugus County or other stakeholders are attending the trade show, participate as a member of this joint delegation. If any of these have a booth, “work” the booth, add Olean and BOA exhibits, and share the cost.
 - Follow-up in a customized and very timely manner with potential prospects, corporate decision-makers, site consultants and relevant others who were met at the trade show. Follow-up can be by letter, phone call or e-mail. Always make sure all requests are acknowledged; all questions are answered; and relevant information about the City of Olean and the BOA, such as a Target Industry Fact Sheet and a map, is provided. Repeat follow-up will be necessary.

Strategy 9 – Consider Print Advertising

- Consider advertising in trade journals as budgets permit, but be forewarned that subscription or circulation information is not a reliable indicator of likely success. Herron Consulting has requested “proof” from publishers, but there is no reliable information documenting the effectiveness of print advertising for community economic development.

Organizational Recommendations

The City of Olean has prime responsibility for facilitating economic development in the community. At the present time, however, the community does not undertake any formalized business retention or recruitment initiatives and does not have an internal expansion or entrepreneurial development program.

Several interviewees mentioned Olean used to have an industrial management council, and suggested efforts be made to restart this organization. They indicated the community has a growing number of companies who would likely join.

Several organizations and stakeholders are involved in economic development in Olean and can and do assist with economic development opportunities and initiatives when requested on an as-needed basis. These include:

- Greater Olean Area Chamber of Commerce
- Cattaraugus County Industrial Development Authority
- Empire State Development, Buffalo – Niagara Enterprise and other county and state government departments and agencies
- Business and banking community, other employers, stakeholders and residents
- Utility companies
- Jamestown Community College, St. Bonaventure University, SUNY, and other post-secondary educational institutions

Economic development is a “team sport” where all the players have a role and success is built upon experience, expertise, skill, trust, collaboration, respect, commitment, proactiveness, flexibility, and responsibility. In general, successful economic development and marketing activities are highly personal and involve establishing and maintaining positive relationships.

Good, collaborative leadership is critical since the leader(s) must steer economic development in a proactive, positive direction for the short and long-term benefit of the community overall.

The stakeholders we interviewed for this study reported that the economic development climate in the City of Olean is better than it has been in the past, and much of this is due to an increased emphasis on economic development by the City (Mayor, Council, and staff). There is more collaboration and trust. Existing working relationships are being strengthened, and new relationships are being formed. The same is true for the other organizations and entities involved in economic development.

Economic Development Organization

Given the different players and interests represented in the economic development community, Herron Consulting recommends an organization be established to coordinate and focus energies on economic development in the City of Olean and the BOA. We also recommend the

organization be structured as a public-private partnership, a best practice that is growing in popularity and success.

Effective public/private partnerships are exactly what they say they are – partnering to share responsibilities and resources of the public and private sectors in a community (or region). They provide opportunities for the public and private sectors to jointly participate, communicate, network, and get directly involved in economic development. The structure for public/private partnerships varies, but we believe those that are structured 50/50 foster greater trust and collaboration and, in the end, more effective and efficient execution.

There are numerous benefits that can be generated from effective public/private partnerships, including:

- The ability to “tap into” a larger pool of public, private and philanthropic funds to support economic development programs in Olean and the BOA, and joint marketing activities with local and state partners.
- The ability to leverage the knowledge and resources of additional Olean partners.
- Organizational efficiencies and ability to expedite corporate site selection decisions being made by prospects, existing industry, new start-ups/entrepreneurs and other investors and decision makers.
- The opportunity to demonstrate community consensus, cohesiveness, collaboration and broad support for local initiatives and proposed new community investments that support economic development. This expression of common purpose and willingness to support development will also lessen perceived risk by businesses considering making new investments in Olean and the BOA.

Every economic development organization is unique, as roles and services are defined by the community that it represents. Some of the services the Olean / BOA economic development organization might provide include:

- Business retention and attraction
 - Business retention is critical since 70% or more of internal growth in a community can come from existing employers and retention programs
- Functioning as the focal point for prospect visits by consultants and corporate decision-makers
- Local education and consensus-building on issues that will impact economic development success; for example, the need for additional spending to support improved infrastructure, public education, etc. and the anticipated return on investment.
- Developing general agreement on a value proposition reflecting community values, and promoting a positive environment for new business start-ups and entrepreneurs
- Marketing the City of Olean and the BOA to internal and external audiences

- Maintaining and expanding relationships, including with state agencies that can directly or indirectly impact local economic development
- Land and building acquisition
- Incentives analysis and recommendations.

A dedicated economic development entity and staff would go a long way toward establishing and maintaining strategic relationships with other organizations and stakeholders involved in economic development and conveying the benefits of Olean and the BOA to the regional and state economic development community.

Time is of the essence! Without a dedicated effective economic development organization, Olean and the BOA are in danger of not effectively competing with other communities to hold onto existing businesses; being unable to attract new businesses engaged in fast track site selection decisions; and not offering maximum support for indigenous business start-ups and entrepreneurs.

Next Steps

The groundwork for establishing the recommended public-private partnership economic development organization involves a number of next steps, including interviews, workshops and best practice research. This is beyond the current scope of services, but is one the Bergmann consulting team can undertake in a subsequent phase of work for the City of Olean BOA.

Appendix G- Phase I ESA

Phase I Environmental Site Assessments have been prepared under a separate cover for **701 Barry Street** and **Constitution Avenue**.

Appendix H

SEQR documentation pending and will be provided under separate cover.