



# East Haddam POCD Update



PEOPLE



PLANNING



RURAL  
LIFESTYLE



VILLAGES



OPEN SPACE

## Town of East Haddam Plan of Conservation and Development **Planning & Zoning Commission Meeting**

May 29, 2018

# Agenda

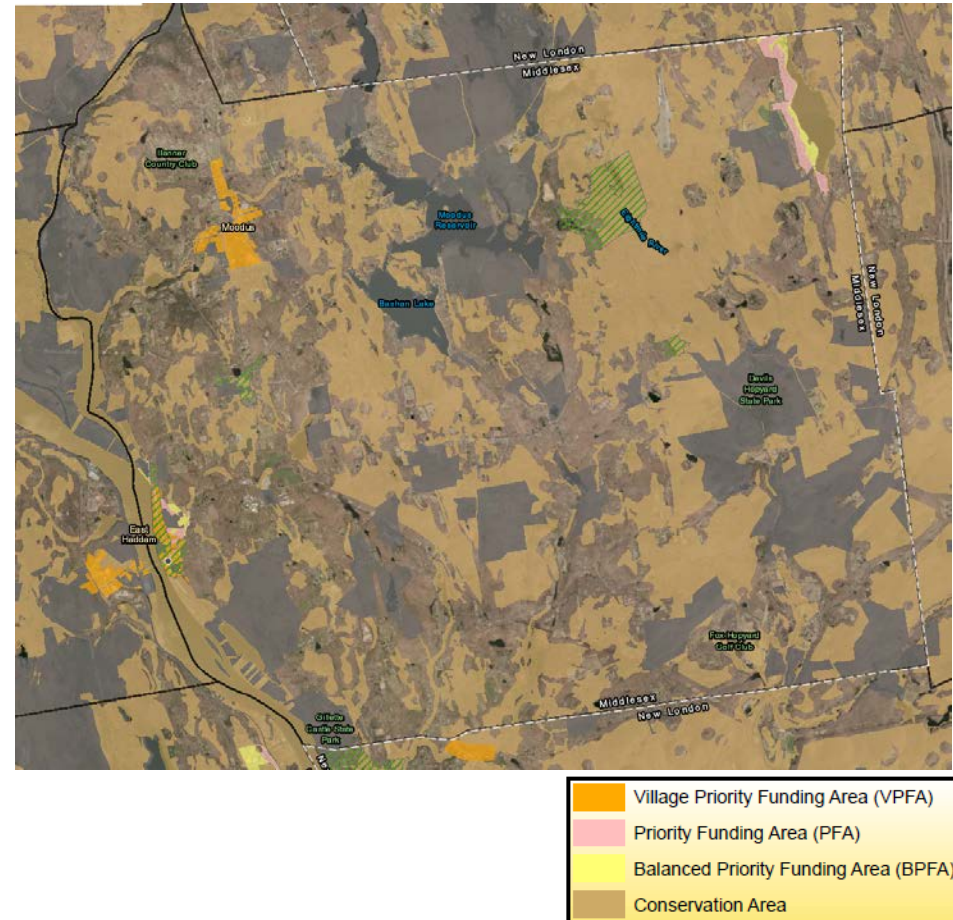
- Initial Survey Results
- Demographics
- Economic Conditions
- Housing
- Fiscal Indicators
- Land Use
- Goals and Actions for Housing, Economic Development

## Anticipated Outcomes

- Understand current town demographics and fiscal conditions
- Sense of direction on POCD goals and objectives for Housing and Economic Development

# Draft State C&D Plan

- Draft of *Conservation and Development Policies: The Plan for Connecticut, 2018-2023* has been released; updates the 2013-2018 Plan
- Locational Guide Map on Priority Funding Areas trimmed back from current Plan – affected more rural and suburban communities, where Census Block geographies are larger
- Priority Funding Areas guide growth-related State grants, such as for significant property acquisitions or development, or transportation investments

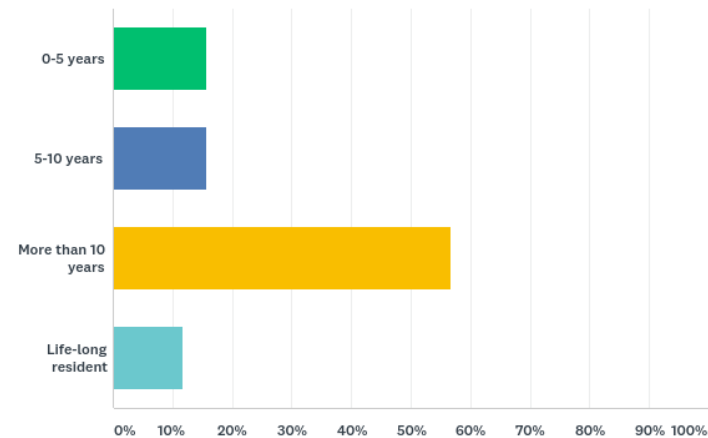


Source: CT.gov/opm

# Initial Survey Results

- 235 Responses to date (approx. 2% of population)
  - 62% aged 35-54
  - 95% year-round residents
  - Most indicate they live in East Haddam or Moodus, but all areas represented
  - 68% lived in town 10+ years; 16% less than 5 years
  - 27% participate on a Town board or organization
- 80% feel a sense of community
  - Community involvement
  - Rural qualities
  - Small town character
  - Local businesses
  - Friendly people

How many years have you lived or worked in East Haddam?



What qualities do you think contribute to the sense of community in East Haddam?





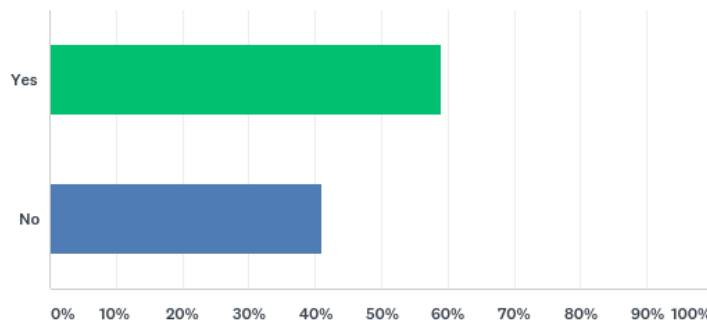
# Initial Survey Results

- Strengths tend to model responses to sense of community
- Primary concerns are economic:
  - Taxes, increasing costs
  - Economic viability, no growth or local services
  - Lack of opportunities
- Economic concerns are frequent reason for considering relocation (some attributed to CT in general)

What are three main concerns you have about living in East Haddam?

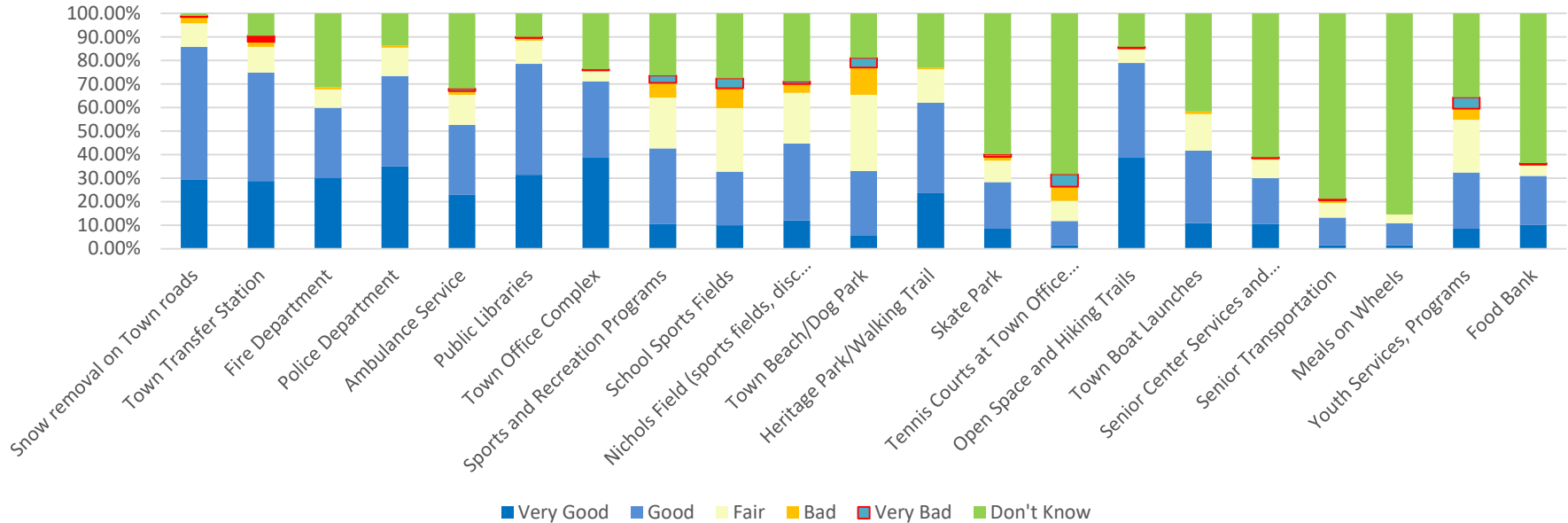
Afford Park Open Space Public Services Noise Road  
 Safety Education Concerns Drug Children  
 School Bridge Taxes Community Town  
 Families Increase Food Businesses Options  
 Budget Loss Government Speeding Rural Character  
 Family Friendly Limited Village Kids Rural Improve  
 Distance Shops Crime Bridge Business  
 Open Space Town Commercial Development  
 Taxes Transfer Station School Cats  
 Community Financial Opportunities Moodus  
 Economic Leadership Cost Mismanagement Residents  
 Housing Developments  
 Youth Crime Education Support Development Moodus  
 Bridge Economic Growth Drugs Limited Town  
 Sidewalks Business Politics Taxes Traffic  
 Cost East Haddam Roads Not Enough Opportunities  
 Distance Resources Rural Community Places Kids  
 Activities Blight

Do you see yourself living in East Haddam in 10 years?



# Initial Survey Results

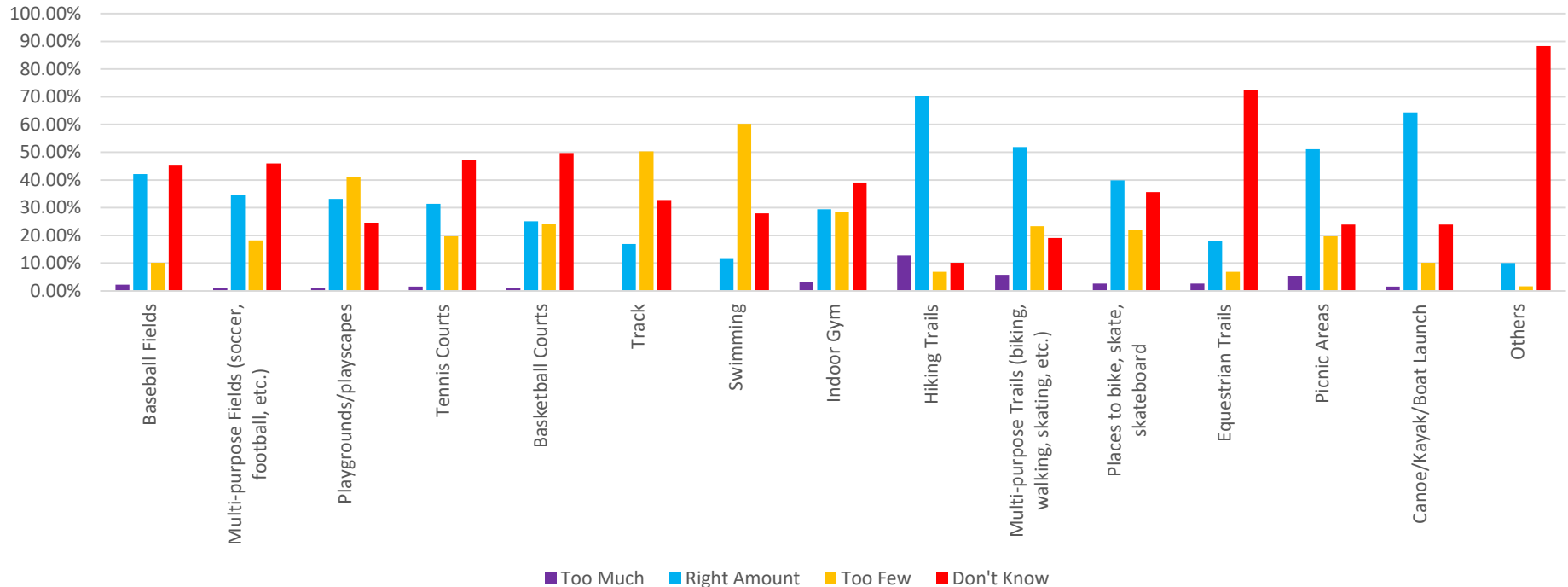
Quality of Town Services



- Most Town facilities and services rated good and very good
  - 87% say services contribute to community satisfaction
- Few ratings of "bad" or "very bad"
- With exception of open space and trails, condition of Town recreation facilities are viewed less favorably, or respondents are unaware of condition
- Little awareness of social services programs

# Initial Survey Results

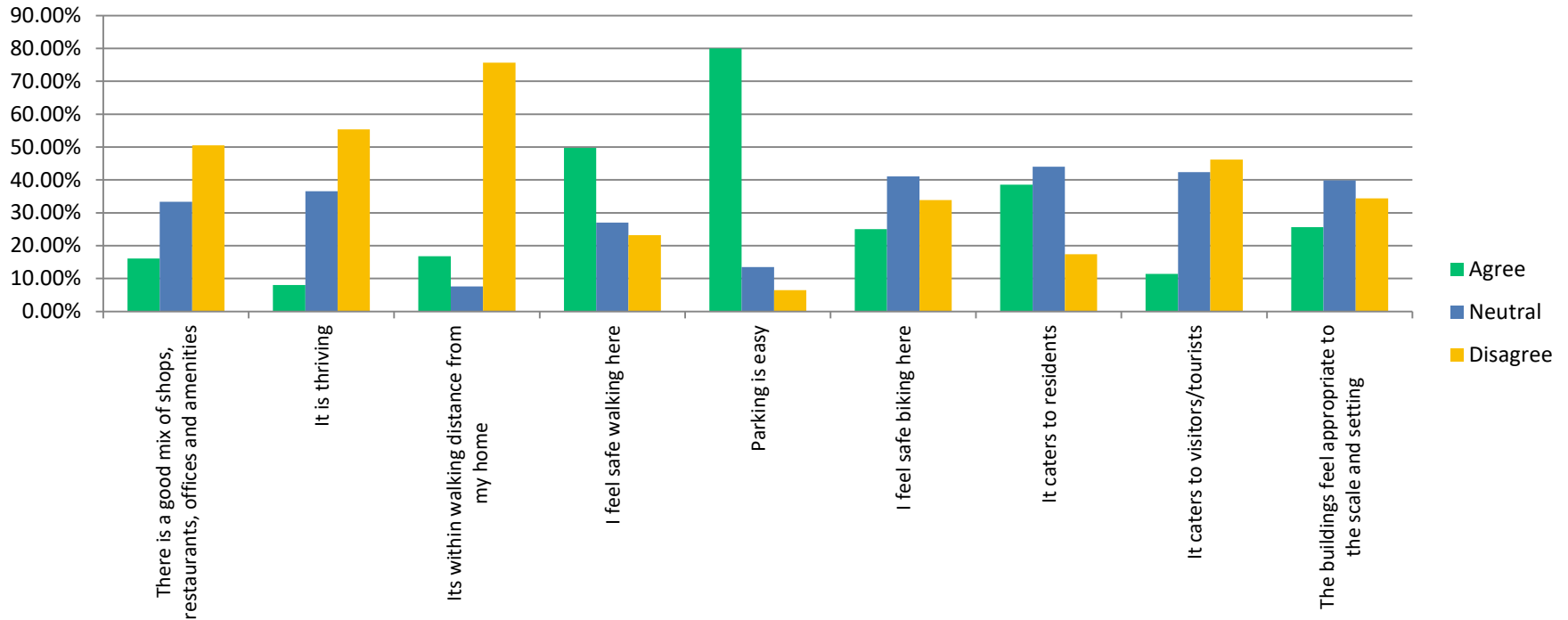
How would you rate the supply and availability of the following facilities?



- Favorable ratings for supply of hiking trails, water access and picnic areas
- Responses indicate demand for playgrounds, tracks, swimming
- Mixed response on sports fields, tennis, indoor gyms may indicate need
- General unawareness of supply may be attributed to aging population without children at home

# Initial Survey Results

Do you say this about Moodus Village?

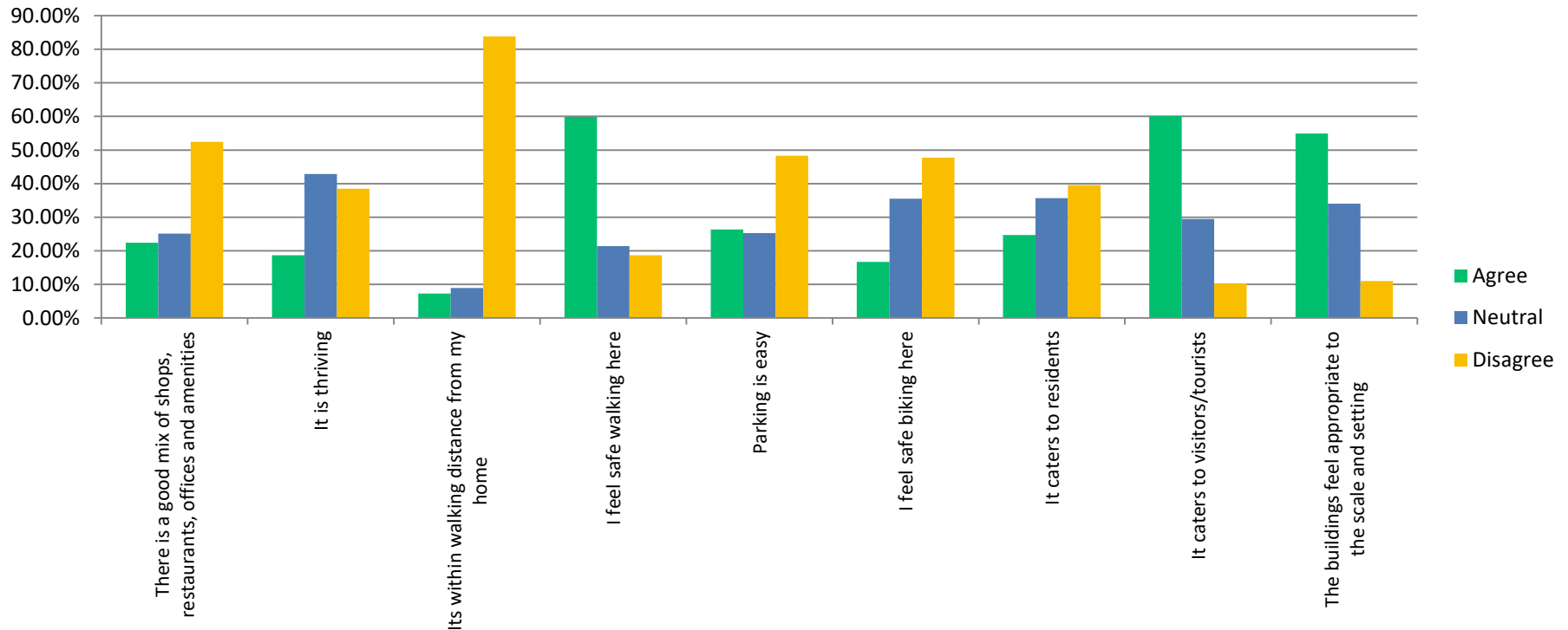


- Respondents indicate Moodus isn't vibrant
- Area viewed strong on access when there, but responses indicate its remote from where people live
- Mixed opinions on usage and character; likely tied to sentiment on vibrancy



# Initial Survey Results

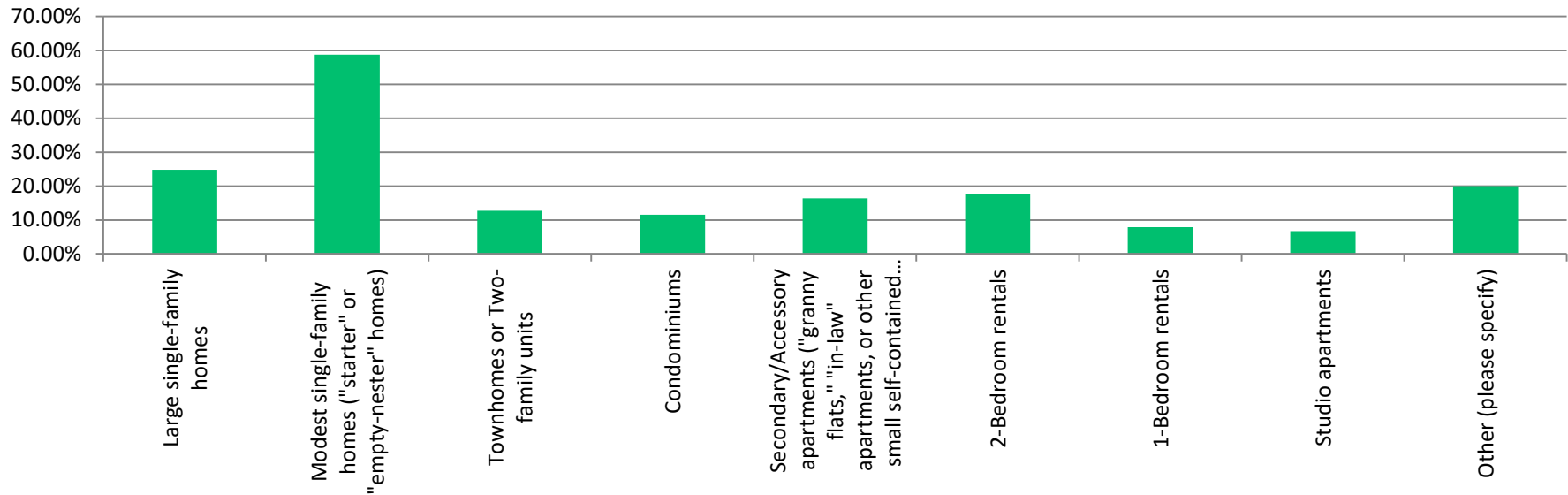
Do you say this about East Haddam Village?



- Respondents indicate East Haddam Village lacks mix of uses; neutral on vibrancy
- Viewed as catering more to visitors, and strong on character
- Sentiment that it's pedestrian friendly, but access for cars and bicycles tends to be viewed unfavorably

# Initial Survey Results

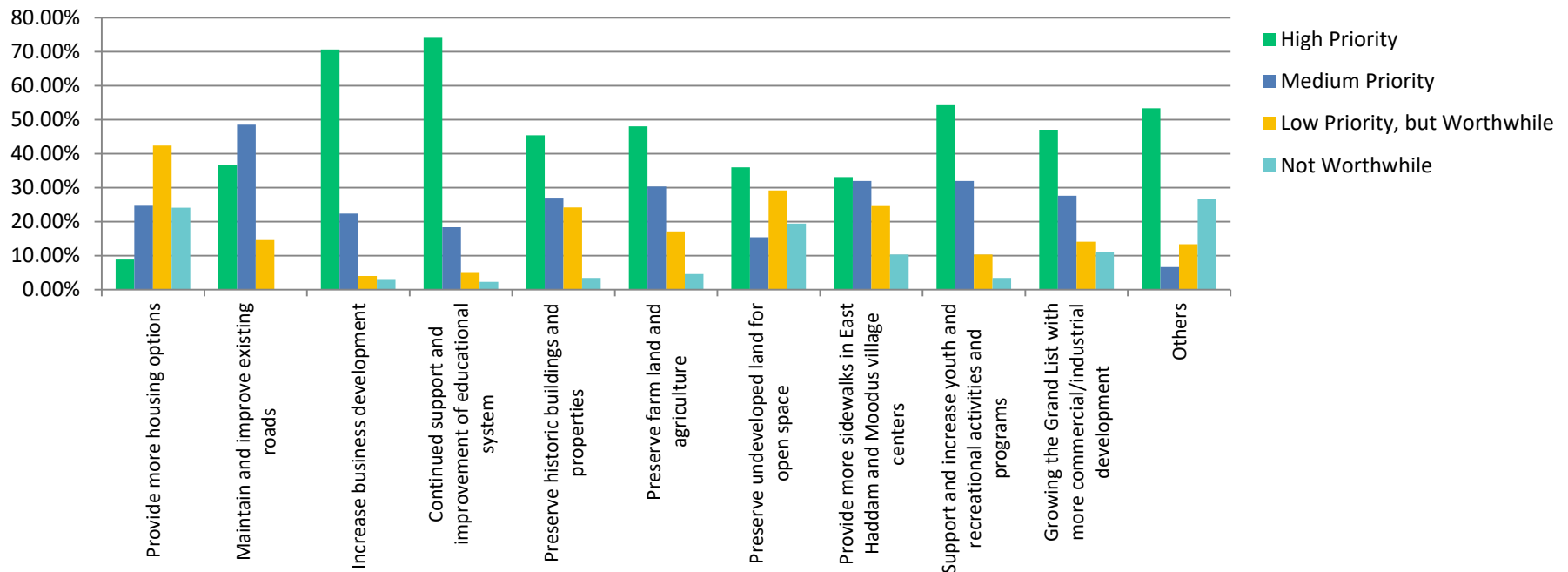
If the Town were to focus on accommodating more housing options, which types are needed most?



- 58% indicate a need for more modest single family housing to serve young professionals or families
- Responses low on development of multi-family housing types
- Written responses show a mix of need for senior housing, but a lack of support for multi-family units; 55% state housing options would benefit the town, vs. 27% state it would have negative impact
  - Sentiment that multi-family and rentals detract from rural character

# Initial Survey Results

Please rate the following in terms of priority focus areas for the Town over the next 10 years .



- Top priority focus areas appear to include business/economic development, more local retail, and support for schools and recreation, with favor to also focus on preservation and rural qualities of the town
- Mobility (roads and sidewalks) show mix of high/medium priority
- Housing development appears to be low priority

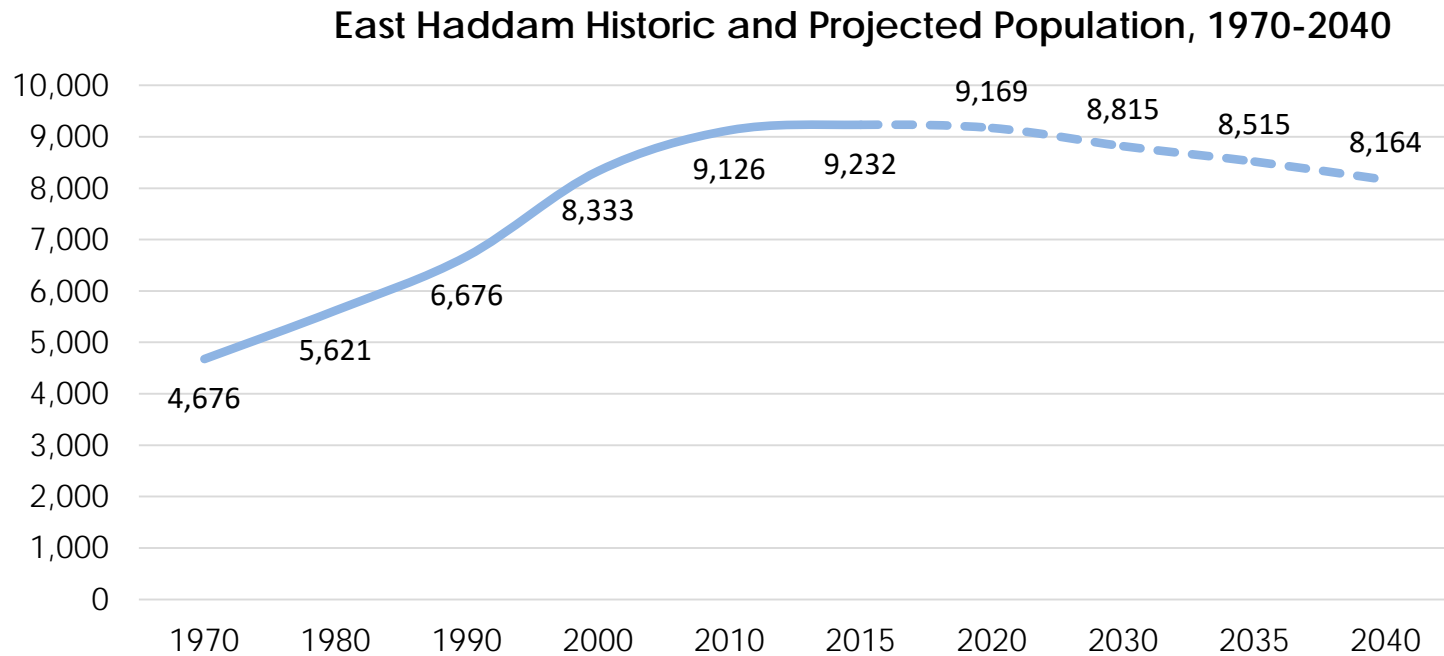
# Initial Survey Results

In your opinion, what is the greatest challenge facing East Haddam's growth and development?

Resistance to Change Historic Balancing Education  
Budget Colchester Rural Character Transparency  
Grow Children Development Middle Town  
Younger Families Business Bussiness Tax  
Ignorant East Haddam Access Open Space  
Drive Location Happen Vision Utilities Housing  
Closed Minded People

- Challenges appear to be working to enhance fiscal conditions in order to reduce taxes
- Appears to be a balance desired between encouraging business growth and maintaining rural character

# Demographics: Total Population



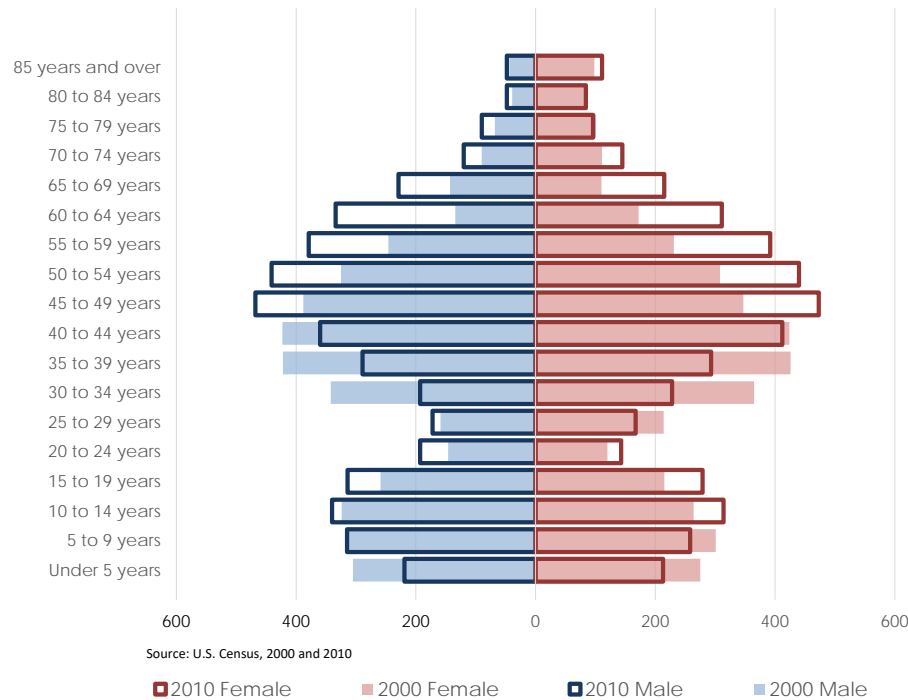
Sources: 1970-1990 CT ECD; US Census 2000 and 2010, ACS estimates 2015; Projections CT DOT.

- Population growth accelerated in the 2000s – 25% increase from 1990 to 2000
- Estimated to have gained additional 10.8% from 2000 to 2015, with a modest growth of 1.2% from 2010 to 2015
- Population is projected to decrease from 2020 to 2040 by 11%

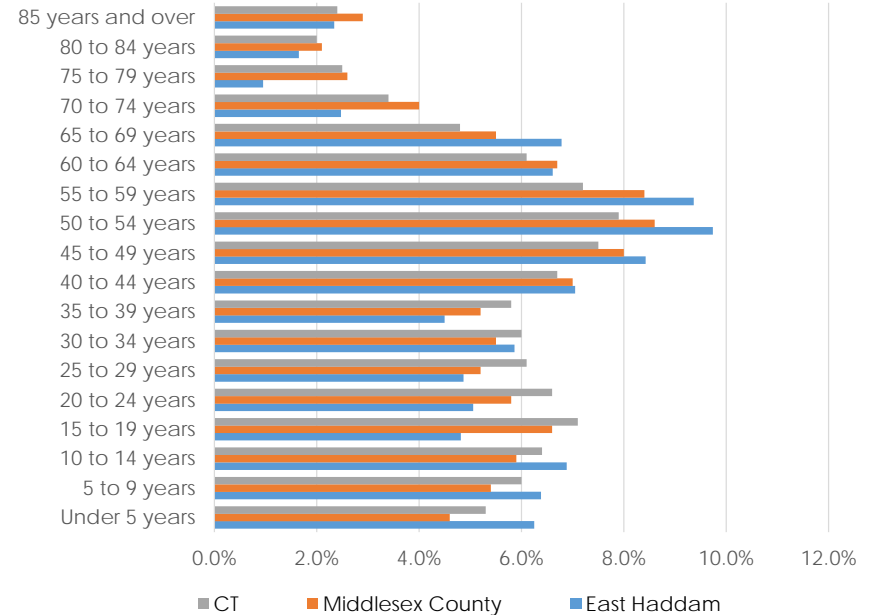


# Demographics: Age Distribution

East Haddam Population Distribution, 2000-2010



2015 Population Distribution Estimates

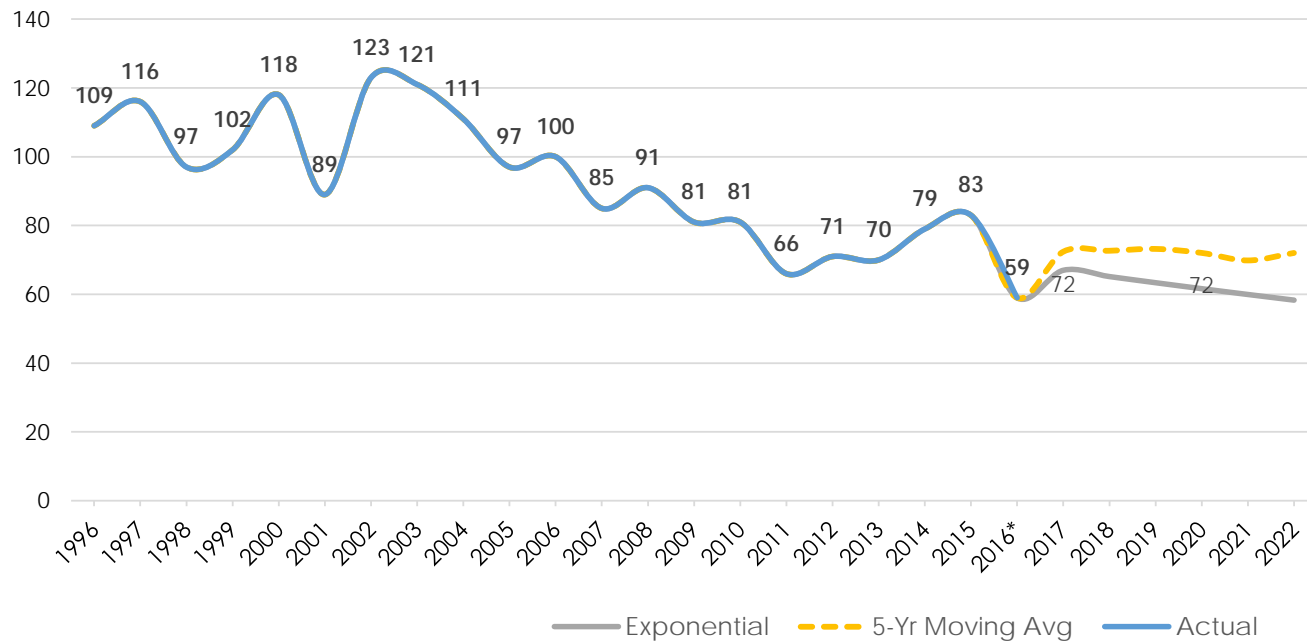


Source: ACS 5-Year Estimates, 2015

- Significant aging of community from 2000 to 2010 – Baby Boomers
- 2015 estimates indicate a higher proportion of young children in East Haddam than in Middlesex County or the State
- 2015 estimates also indicate continued aging of the workforce – potential for housing turnover as retirement ages are reached

# Demographics: Births

East Haddam Actual and Projected Births



- Births peaked in 2002 and started to decline prior to recession
- Births increased from 2010 to 2015, but below rates of 1990s and early 2000s
- Regression analyses did not yield a good fit; however, a range of models all indicated an upward trend

# Demographics: Households

- 30% of households include children under age 18 – primarily living with married-couple families
- More households have school-age children (6-17 years) than young children, under 6
- 35% of all households include one or more persons age 60+
- Almost 9% of all households consist of a householder age 65+ living alone

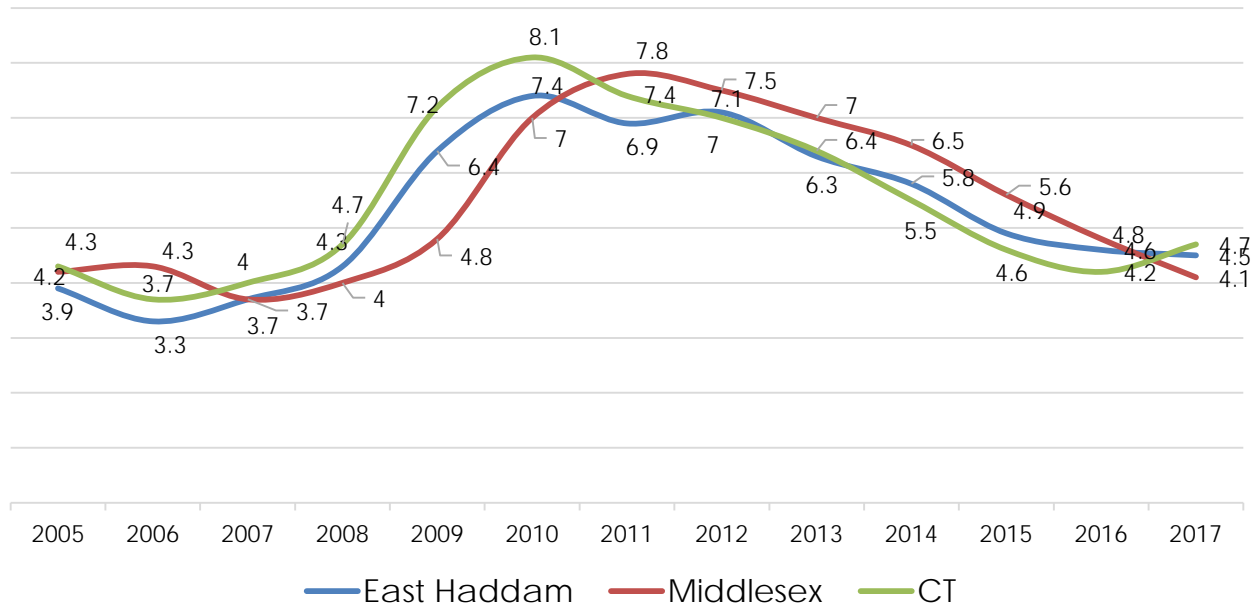
2015 Households by Type

Household Type	Estimate	% of Total Households
Total Households	3,453	100.0%
Average Household Size	2.6	
With Own Children Under 18 Years	1,070	31.0%
<b>Married Couple Families</b>	<b>2,213</b>	<b>64.1%</b>
With Own Children Under 18	882	25.5%
Under 6 Years	180	5.2%
Under 6 and 6 to 17	212	6.1%
6 to 17 Only	506	14.7%
<b>Single Parent Families with Own Children Under 18</b>	<b>188</b>	<b>5.4%</b>
<b>Other Family Households</b>	<b>122</b>	<b>3.5%</b>
<b>Nonfamily Households</b>	<b>930</b>	<b>26.9%</b>
Householder Living Alone	749	21.7%

Source: American Community Survey 2011-2015

# Economic: Unemployment Rates

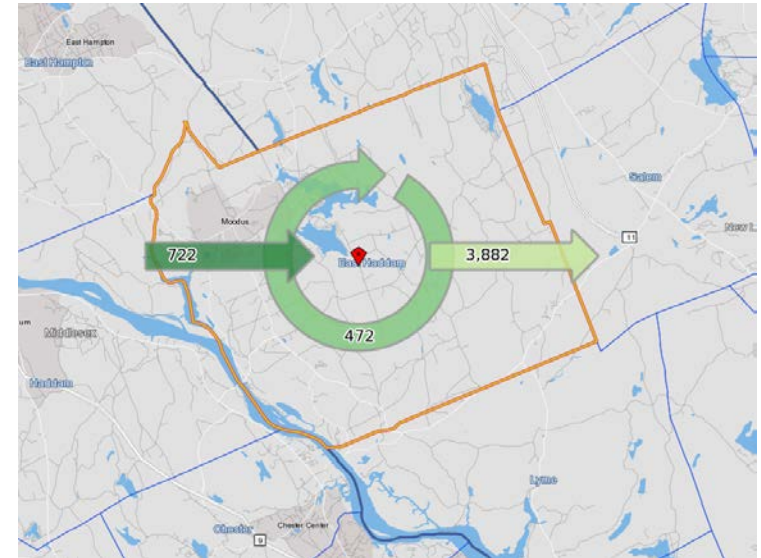
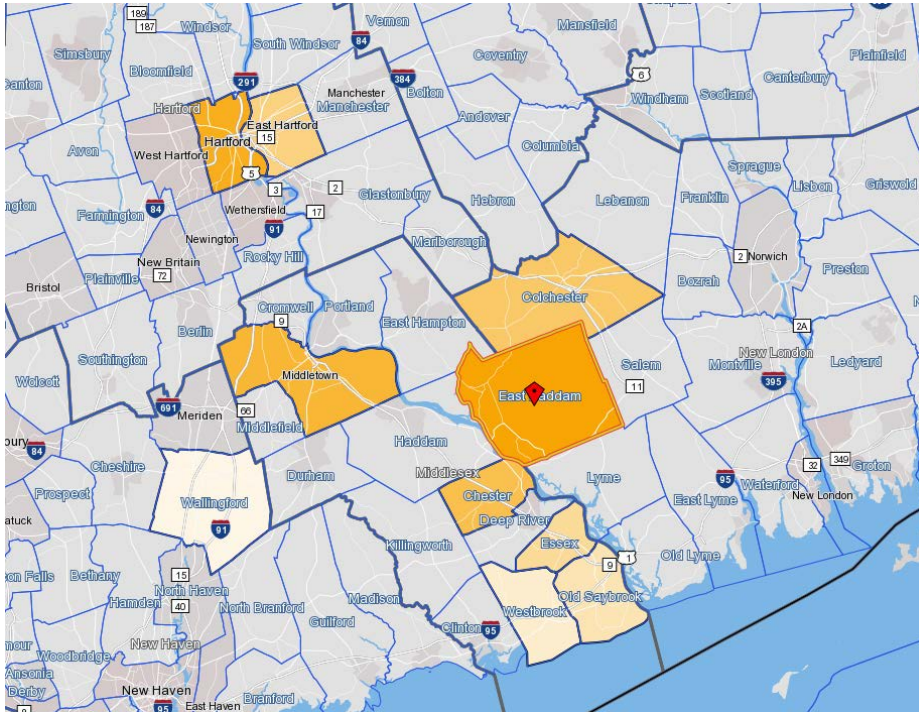
East Haddam, Middlesex County and CT  
Unemployment Rates



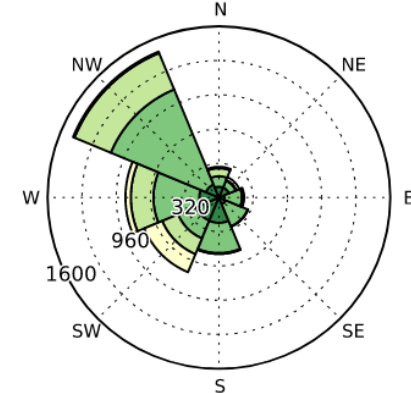
- Unemployment trends generally mimic State, and at a slightly lower rate than Middlesex County; County rate decreased in 2017
- Slow recovery from Great Recession, with current unemployment rates nearing pre-Recession rates

# Economic: Areas of Employment

- 3,500 residents (over 1/3) work outside East Haddam, with 722 workers commuting in
- Top destinations of commuters - Hartford, Middletown, Chester and Colchester



Job Counts by Distance/Direction in 2015  
All Workers

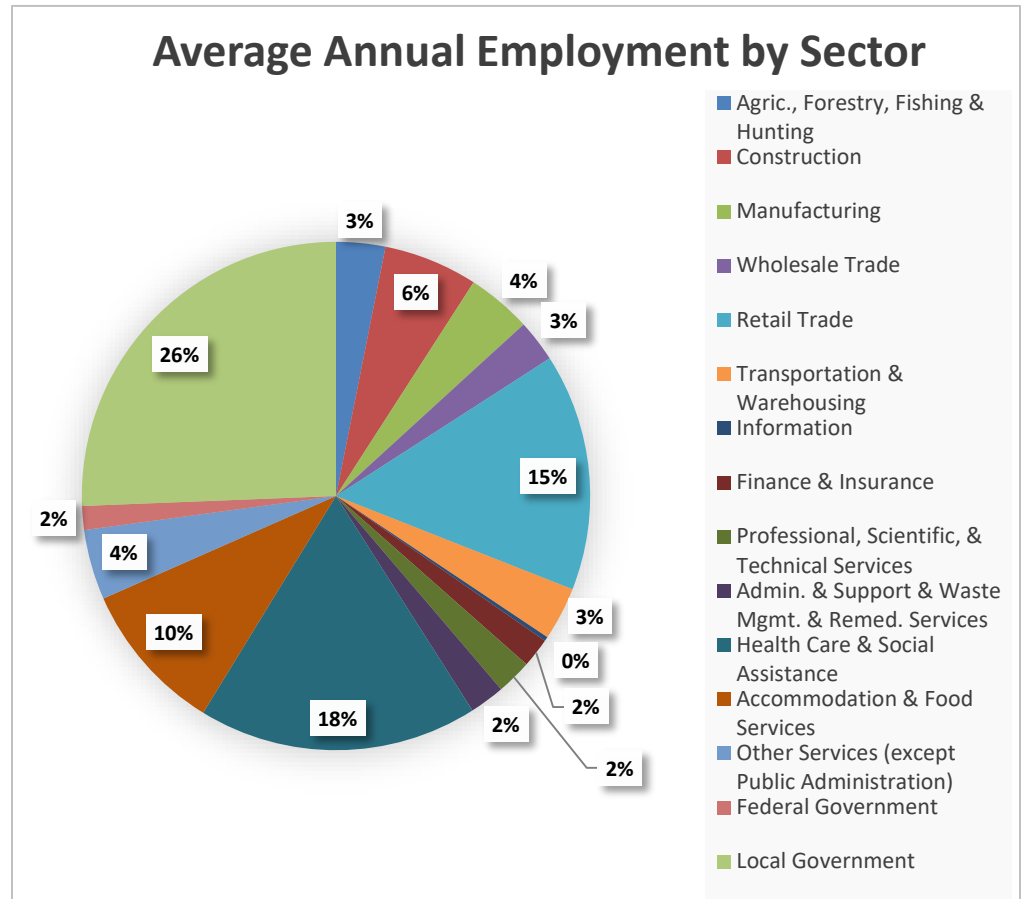


Source: U.S. Census On The Map, 2015



# Economic: Town Employment

- Largest Employment Sectors:
  - State/Local Government (287 jobs)  
(Includes schools)
  - Health/Social Assistance (199 jobs)
  - Retail (169 jobs)
  - Accommodations/Food Service (108 jobs)
- Highest average annual wage rates (>10 jobs):
  - Wholesale (30 jobs, \$157,465)
  - Finance/Insurance (21 jobs, \$56,570)
- Annual wage rates for largest sectors:
  - Local Government \$53,470  
(includes schools)
  - Health/Social Assistance \$33,820
  - Retail \$33,635
  - Accommodations/Food Service \$18,388



*Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages*

Note: data obtained does not indicate figures for Arts/Entertainment; may be included with other industries.

# Summary of EDC Plan (2016)

## Goals from 2016 EDC Plan Update (Paraphrased)

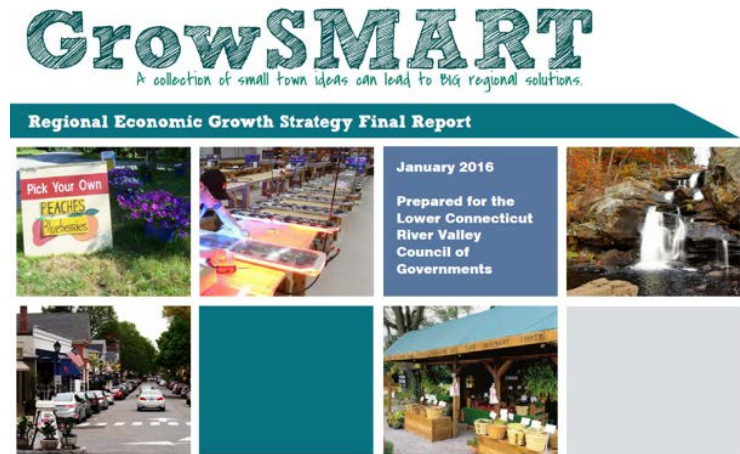
- Develop Goodspeed Landing as the town's primary location for visitor services while retaining the rural, historic and cultural character of the Village.
- Develop the Moodus Center as a location for commercial businesses.
- Encourage appropriate industrial and commercial business development in the Four Corners Center and East Haddam Industrial Park.
- Support/retain existing businesses and attract new commercial businesses to town to broaden the tax base.
- Increase awareness of East Haddam as a desirable daytrip/weekend destination and attract arts/culture/outdoor-sports related businesses while retaining the town's rural, historic and cultural character.
- Promote awareness of existing Agricultural based businesses and encourage/support new Agricultural based business opportunities.

# Regional Economic Conditions

2016 Regional Economic Growth Strategy notes the following economic drivers:

- Traded Goods - manufacturing, wholesale
- Tourism - cultural, natural resources
  - Influences retail, accommodations, food service
- “Lifestyle” - second home residents; people who can work from anywhere
  - Influences support and service industries
- “Local” - driven by resident and institutional demand
  - Health care, social services, government, retail
  - Vibrancy depends on size/wealth of population

Lifestyle and Local businesses are key contributors to growth, with a net gain of 1,500 jobs in the region since 2012



# Regional Economic Policies

- Balance Development and Conservation
  - Use design standards to maintain character
  - Target density to areas with infrastructure; consider structure to share revenues and expenses for infrastructure
- Build on Existing Economic Assets
  - Full continuum of business creation, support entrepreneurs
  - Historic artist and manufacturing heritage; expand to new industries
  - Tourism—focus on associated revenue potential
- Hedge the Future
  - Support housing where infrastructure, transportation access is available
  - Support “metro edge community” to compete for wider demographic and talent pool (Middletown)
  - Consider creation of regional development entity



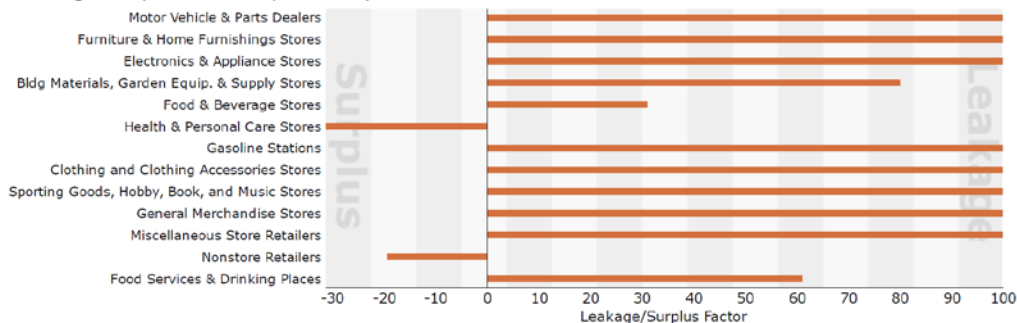
# Local Consumer Spending

Data indicates most households shop elsewhere for goods and services

- Local spending indicates surplus for health/personal care (Moodus) and home improvement establishments (East Haddam)
- Restaurants and bars show even split in spending in East Haddam and elsewhere
- Most daily needs (food and beverage stores, general merchandise) appear to be obtained outside of Town.

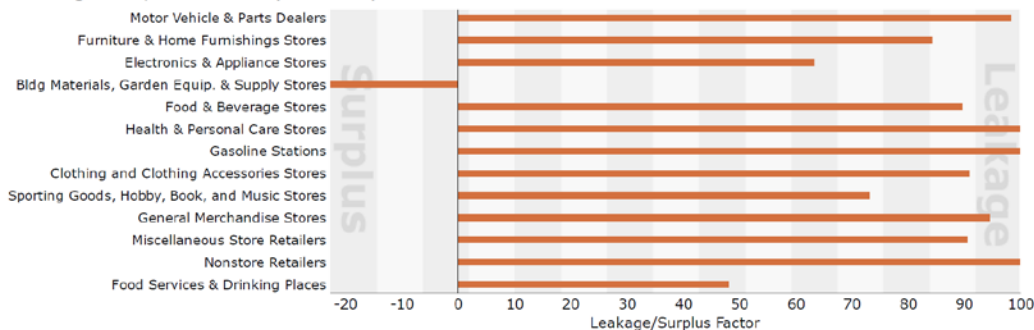
## Annual Spending in Moodus (Zip Code 06469)

Leakage/Surplus Factor by Industry Subsector



## Annual Spending in East Haddam (Zip Code 06423)

Leakage/Surplus Factor by Industry Subsector



Data indicates total local spending potential of \$97.6M, of which \$16.3M is spent locally, or \$81.3M in spending outside East Haddam (\$2.7M on-line).



# Tourism Spending

Data indicates local spending on entertainment and recreational fees (excluding equipment) is less than sales.

- 2017 average local spending of \$84 on theater/ concerts
- Average local spending of \$144 per-person on recreational vehicles and fees
- More spending at restaurants and specialty food stores in East Haddam zip code than local demand

**Indicates that most spending on cultural and recreational venues in East Haddam is likely attributed to tourism.**



# Tourism Impacts

- In 2017, Goodspeed had an estimated 90,000 visitors over 34 weeks (April to December), in addition to other visitors for programs throughout the year. There were 9 show-times per week.
- Gillette Castle State Park drew 250,000 visitors in 2012 (verification pending on current numbers and visitors to Devil's Hopyard and other State venues)
- There are 17 sites and structures on the National Register of Historic Places
- Approximately 50 tourism-related businesses are registered with the EDC



# Economic Development: Village Revitalization

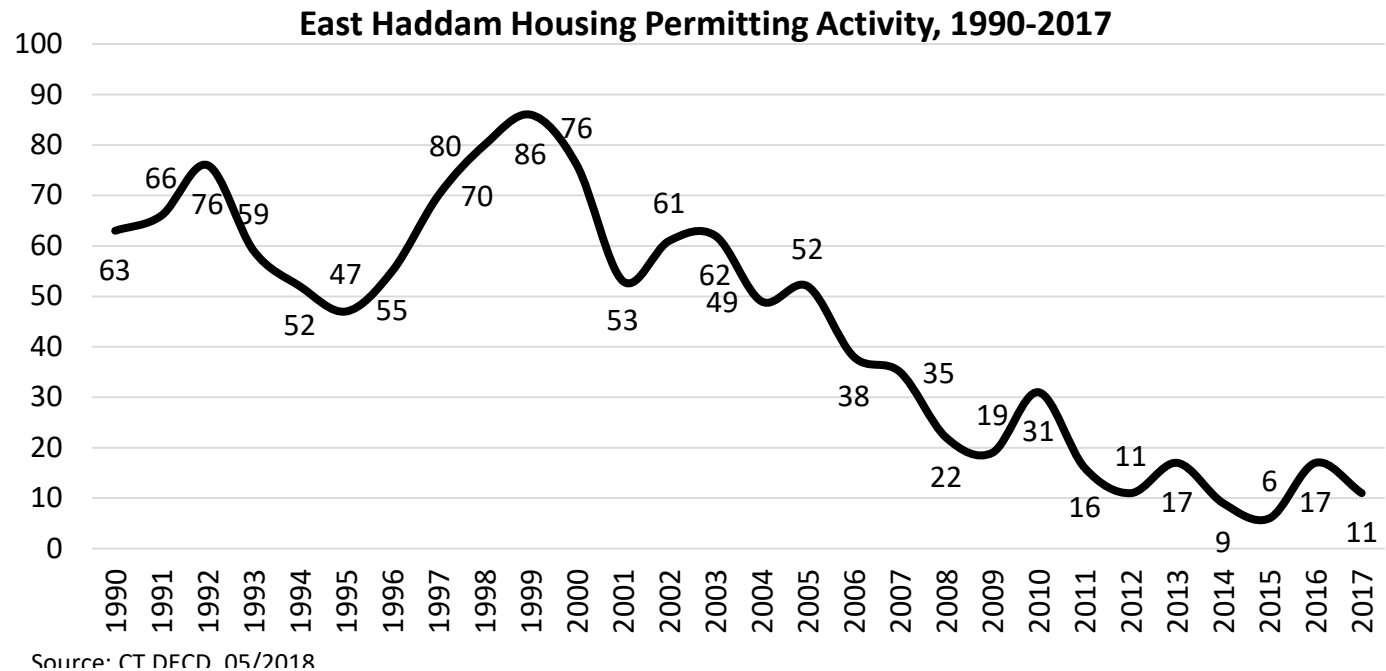
Village Revitalization Committee reconvened to address reuse of Town property

- RFP out for environmental assessment
- Exploring options to prepare a master plan, and/or a “familiarization event” to solicit input from developers
- Parking needs and access issues; road relocations are not CTDOT jurisdiction
- Town seeking BUILD grant application with Haddam for sidewalk construction on bridge
- Pedestrian connection will create a vital link to Tylerville, State Eagle Landing property and assets on west side of River. Preliminary scheduled in fall 2019-2021.



# Housing: Total Units

- Housing permits peaked in the late 1990s
- Permitting very low since 2010



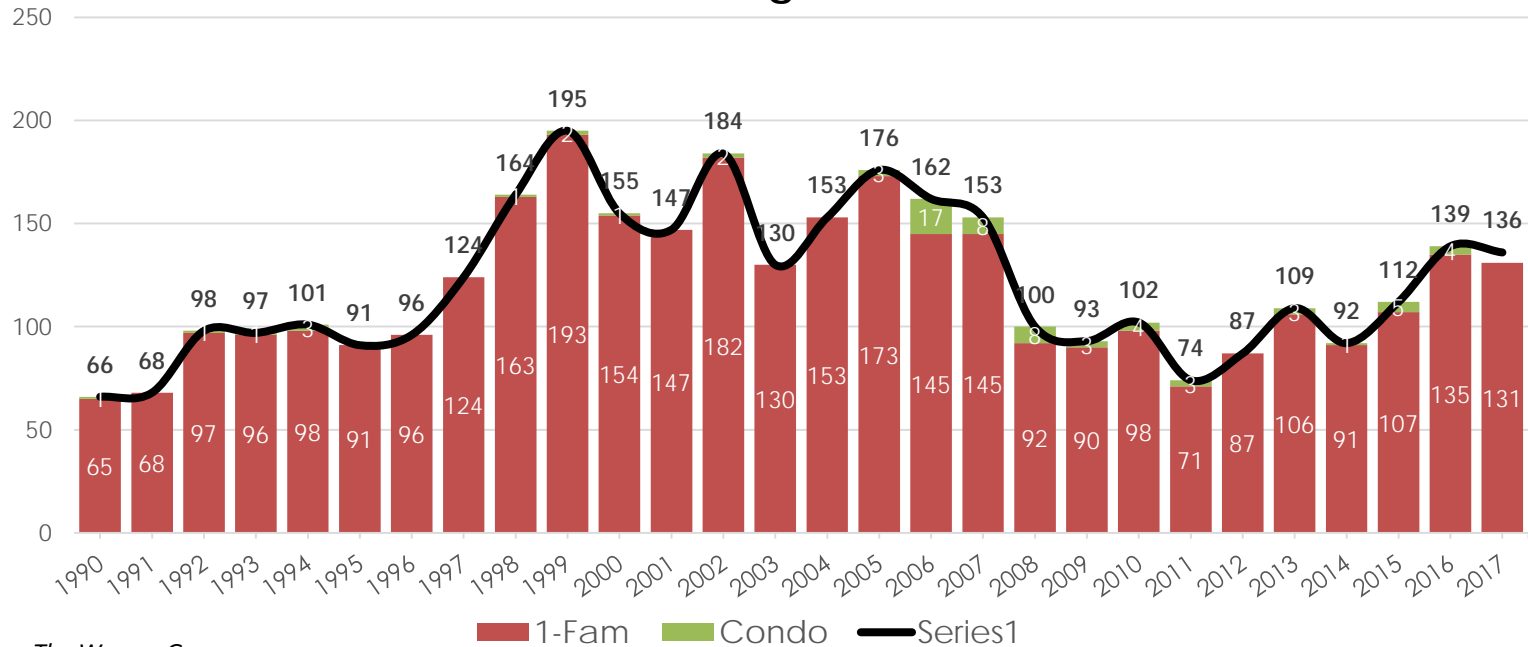
- Housing units increased at a greater rate (12.3% increase) than total population (9.5% increase) from 2000 to 2010
- Minimal growth in housing from 2010 to 2016 (0.6% increase)

East Haddam Total Housing Units				
2000	2010	% Change 2000-2010	2016 Estimate	Percent Change 2010-2016
4,015	4,508	12.3%	4,533	0.6%



# Housing: Sales

East Haddam Housing Sales, 1990-2017

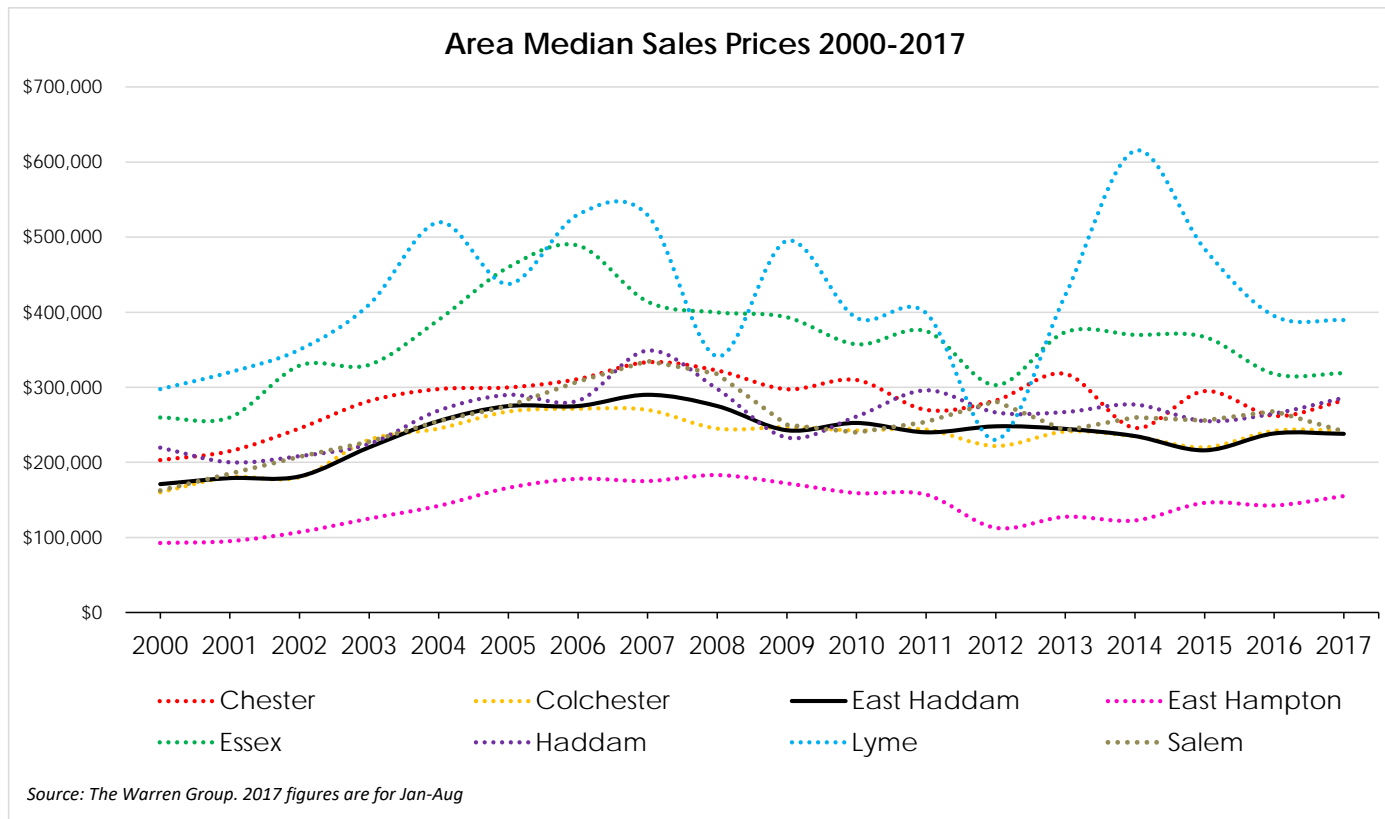


Source: The Warren Group

- Housing sales are predominantly single-family units
- Recession cut annual sales in half from housing boom of mid-2000s
- Sales generally increasing since 2011, nearly back to pre-recession levels
- 2018 appears to be on pace with 2017 sales numbers



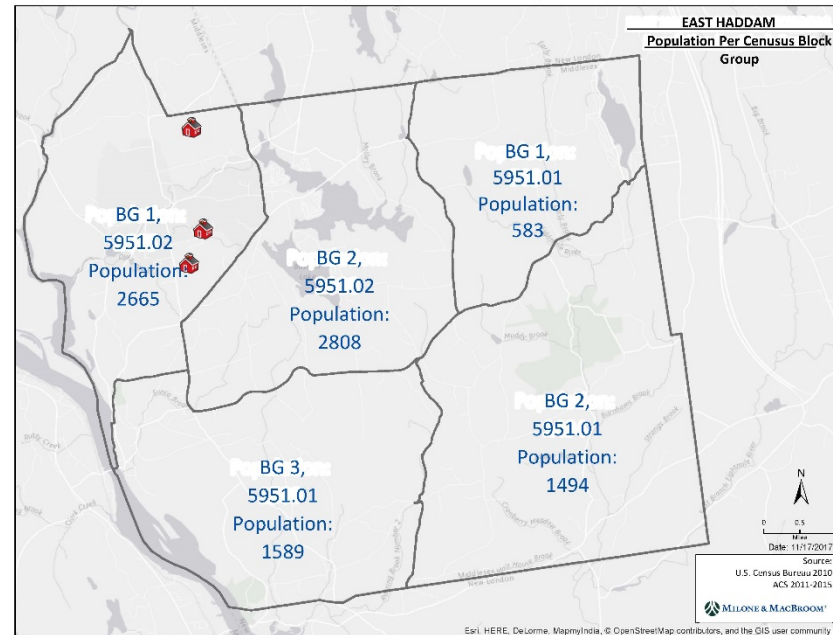
# Housing: Sales Prices



- East Haddam's median home values on lower end of peer towns, but has consistently moderate sales prices
- Prices still struggling to recover from Recession – appears to be a regional issue

# Housing: Rental Units

- 15% of units in East Haddam are renter occupied
- Rental housing is concentrated in Moodus (densest population area and densest student enrollment area)



Geography	Total Occupied Units	Owner-Occupied		Renter-Occupied	
BG 1, Tract 5951.01	300	274	91.3%	26	8.7%
BG 2, Tract 5951.01	529	492	93.0%	37	7.0%
BG 3, Tract 5951.01	601	519	86.4%	82	13.6%
BG 1, Tract 5951.02	1146	865	75.5%	281	24.5%
BG 2, Tract 5951.02	1017	916	90.1%	101	9.9%
<b>Total</b>	<b>3,593</b>	<b>3,066</b>	<b>85.3%</b>	<b>527</b>	<b>14.7%</b>

# Town Fiscal Indicators

- The POCD guides capital expenditures through the CGS 8-24 referral process
- Important to be cognizant of fiscal conditions when considering goals and objectives

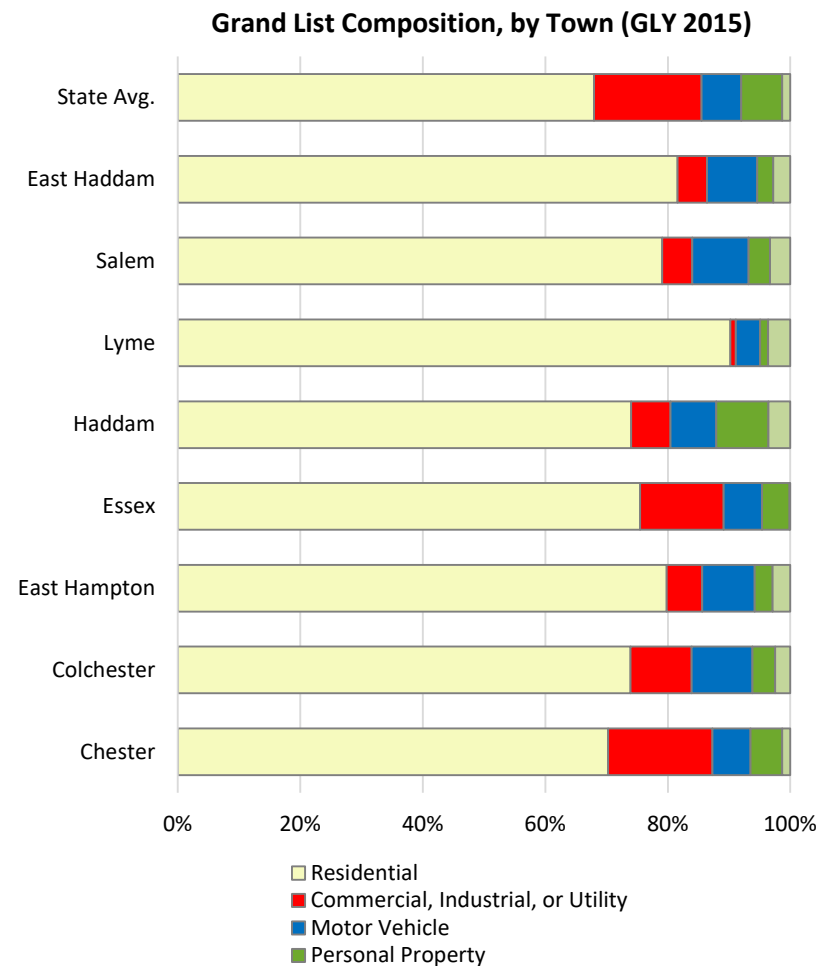
## **CGS 8-24 Referral Process:**

No municipal agency or legislative body shall take the following actions until the proposal to take such action has been referred to the Planning Commission for a report:

- (1) locate, accept, abandon, widen, narrow or extend any street, bridge, parkway or other public way,
- (2) locate, relocate, substantially improve, acquire land for, abandon, sell or lease any airport, park, playground, school or other municipally owned property or public building,
- (3) locate or extend any public housing, development, redevelopment or urban renewal project, or
- (4) locate or extend public utilities and terminals for water, sewerage, light, power, transit and other purposes

# Town Fiscal Indicators

- Property tax revenues comprise 86% of Town expenditures; in line with State average
- Residential uses comprise 81.6% of the grand list
- Proportion of commercial, industrial or utility property is lower than peers, at 4.8% of total grand list
  - State average is 17.5%
  - Majority of peer towns range from 6 to 17%
- Personal property values are low, at 2.6% of total grand list
  - State average is 6.7%
  - Peer towns are between 3.5 and 8.5%



Source: Connecticut Office of Policy and Management:  
Municipal Fiscal Indicators, Fiscal Years Ended 2012 to 2016

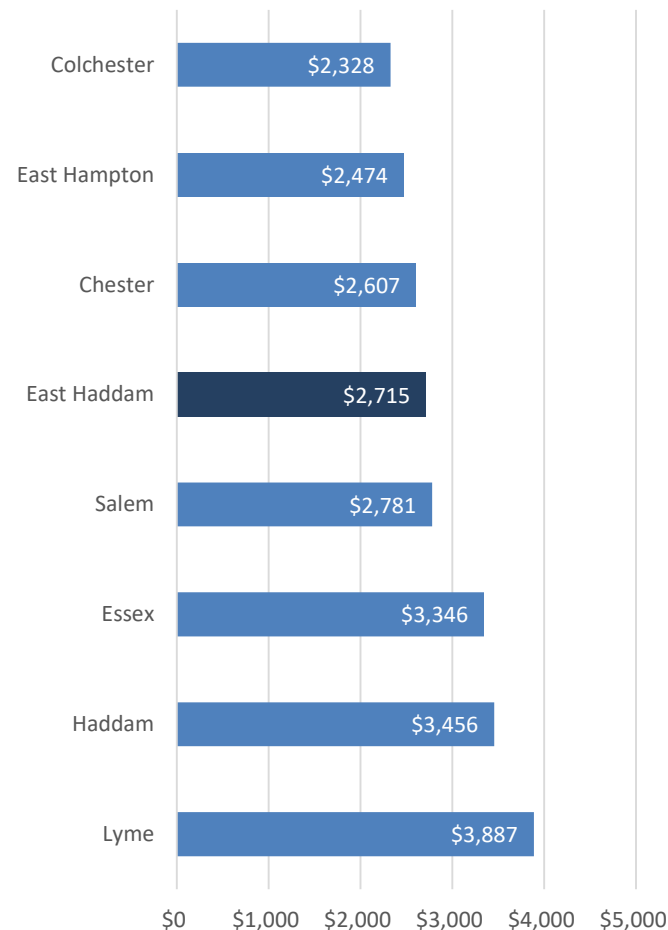
# Town Fiscal Indicators

- Per capita property tax levy of \$2,715 is in the middle of peer group
  - State average for towns under 10,000 in population is \$2,950, and statewide median is \$2,783
- FY16 Equalized Mill Rate was at higher end of peer group, less than only Colchester and Salem
- FY18 Actual Mill Rate of 29.58 is in the middle of the peer group

East Haddam and Peer Group Mill Rates

Municipality	FY 2017/18 Mill Rate
Lyme	18.25
Essex	21.96
Chester	26.36
East Haddam	29.58
East Hampton	31.32
Haddam	31.69
Salem	32.20
Colchester	32.37

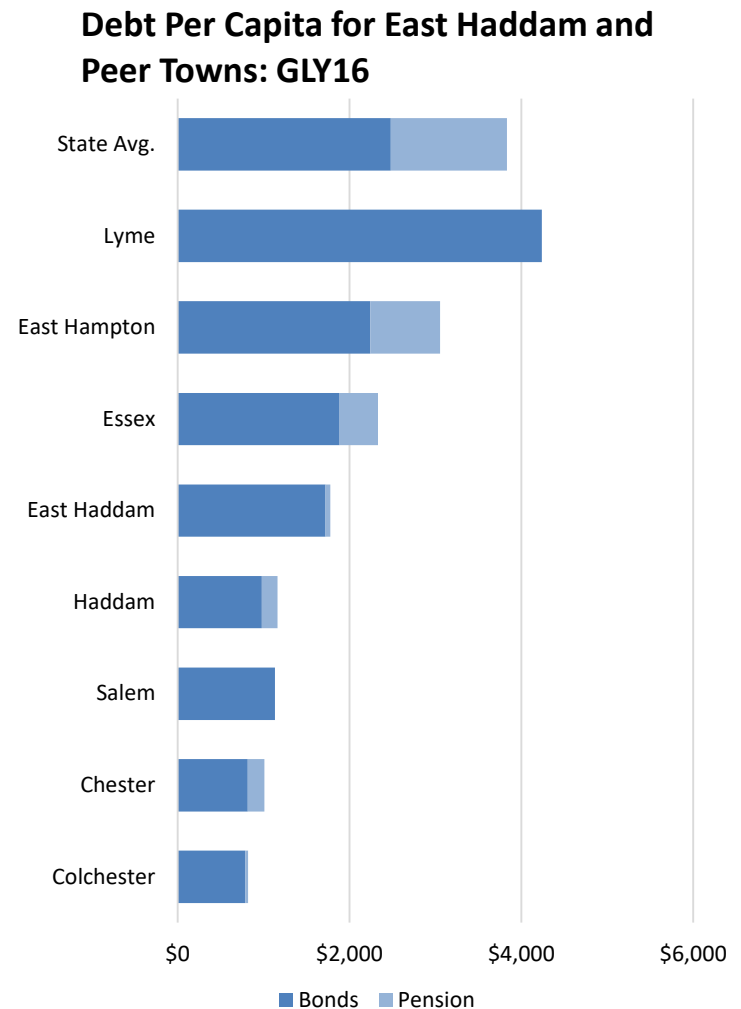
Property Tax Levy Per Capita FYE16



Source: Connecticut Office of Policy and Management:  
Municipal Fiscal Indicators, Fiscal Years Ended 2012 to 2016

# Town Fiscal Indicators

- East Haddam has an AA+ Standard & Poor's bond rating – indicative of town's strong financial standing
- 2016 debt per capita was \$1,775; \$1,721 in bonds for new Middle School, sewer treatment plant, and open space acquisitions
  - In the mid-range of debt per capita in peer group; much lower than state average of \$2,480



Source: Connecticut Office of Policy and Management:  
Municipal Fiscal Indicators, Fiscal Years Ended 2012 to 2016

# Principal Taxpayers

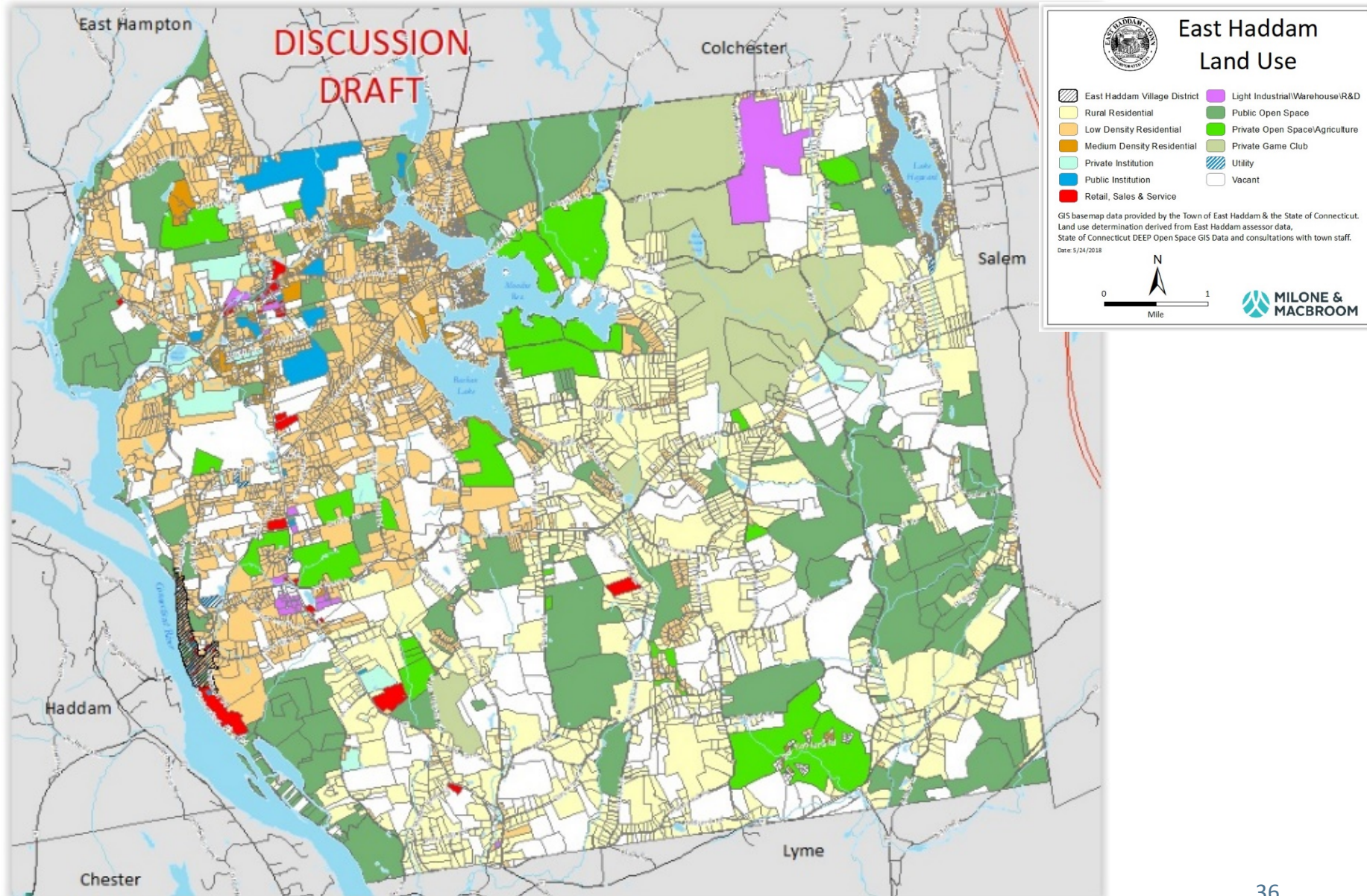
Rank	Taxpayer	Grand List Value	Percent of Net Grand List	Notes
1	CT Light & Power	\$ 16,418,210	1.91%	Utility
2	Fox Hopyard Golf Club	\$4,349,360	0.51%	Private Recreation
3	RMD Land Development LLC	\$2,295,410	0.27%	Residential
4	Goodspeed Real Estate LLC	\$2,221,240	0.26%	Theater
5	Banner Country Club	\$1,918,270	0.22%	Private Recreation
6	Healthcare Holdings LLC	\$1,902,040	0.22%	Nursing Home
7	Fox Hopyard Realty LLC	\$1,750,000	0.20%	Residential
8	Iglesia Ni Cristo	\$1,638,200	0.19%	Johnsonville Village
9	Goodspeed Opera House Foundation	\$1,485,480	0.17%	Theater
10	Wildwood Inc.	\$1,450,440	0.17%	Residential
<b>Total Net Grand List</b>		<b>\$35,428,650</b>	<b>4.08%</b>	

*Source: Connecticut Economic Resource Center*

- CT Light & Power is the largest tax generator in East Haddam
- Half of the Top-10 land holders are country clubs or residential developments; 1.3% of the total assessed value in Town
- Goodspeed entities comprise two of the Top-10
- One Top-10 land holder is senior housing/nursing home; indicative of national economic growth trend in sector



# Land Use



# Land Use

Land Use	Acres	% of Total
Rural Residential	7,169	20%
Low Density Residential	5,116	14%
Medium Density Residential	517	1%
<i>Total</i>	<i>12,802</i>	<i>35%</i>
Private Institution	496	1%
Public Institution	368	1%
<i>Total</i>	<i>864</i>	<i>2%</i>
Retail, Sales & Service	204	1%
Light Industrial\Warehouse\R&D	411	1%
<i>Total</i>	<i>615</i>	<i>2%</i>
Public Open Space	6,662	18%
Private Open Space\Agriculture	1,900	5%
Private Game Club	2,551	7%
<i>Total</i>	<i>11,113</i>	<i>31%</i>
Utility	34	0%
Vacant	8,159	22%
Other	2,788	8%
<b>Grand Total</b>	<b>36,375</b>	<b>100%</b>

# Goals Discussion

## Examples of Goals and Objectives:

- Goals are the outcomes you want to see realized
- Objectives are the actions that need to be completed to achieve the Goal

Goal	Strategies
1. Increased access to locally grown foods	1.1 Identify an appropriate site on the west side of Town for a community garden.
	1.2 Work with schools to promote ongoing farm-to-school food service programming and student gardens.
2. Improved traffic circulation on key arterials	2.1 Revise zoning to require landscaping improvements and access standards for new commercial development.
	2.2 Seek DOT funding for a study of Town Center circulation and potential improvements, including opportunities to convert existing one-way streets to two-way streets.

# Opportunities

Looking at the actions of the last POCD:

- What sort of uses are currently lacking in town that would best meet objectives to expand the tax base, meet residents needs, and also protect the rural character of East Haddam?
  - Which of these uses are most appropriate for Moodus, East Haddam Village, Four Corners, or other areas?
- What initiatives could be taken to better reinforce and build upon the key economic generators in East Haddam?
  - What short- and long-term actions are needed to enhance these efforts?
- What obstacles (e.g. regulatory, physical, utilities, others?) have inhibited or constrained desired goals for growth?
  - What actions are needed to overcome these obstacles?