



The Department has a total of 31 pieces of equipment that include plow-equipped dump trucks, loaders, road graders, and mowers that are used in snow plowing operations and street work. The Department also has specialized equipment such as road wideners, curbers, backhoes, and street sweepers.

The department strives to utilize shared services by sharing personnel and equipment with adjacent municipalities and the school district. The Village also shares salt storage with Chemung County and a vehicle fueling facility with the Horseheads Central School District.

County Highway Division

The Chemung County Department of Public Works provides and maintains a reasonably safe, convenient, and effective highway system for the traveling public. The County highway system is comprised of 250 miles of roads and 220 bridges.

Alternative Transportation Options

Rail Service

The nearest passenger rail station to the Village of Horseheads is in Syracuse at the William F. Walsh Regional Transportation Center. This location serves as both an Amtrak train and bus station, allowing for transfer from a passenger train to a bus bound for the Elmira Transportation Center. Primary freight rail service to the region is provided by Norfolk-Southern Inc. via the Southern Tier route. Two short carriers, the Finger Lakes Railway Corporation and the Southern Tier Extension Railroad, connect with the Norfolk Southern line in Chemung County. There is a spur track running north-south from the main line in the Village and Town of Horseheads. The Southern Tier line is one of Norfolk-Southern's two main line routes into the Metropolitan New York market.¹⁰

Bus Service

The Chemung Country Transportation System operates a bus service that runs local and regional routes. Three local routes service the Village of Horseheads, including Lake Road, Grand Central Plaza, and Elmira-Corning Community College. All local bus fares are \$1 per trip, however a monthly bus pass can alternatively be purchased for \$36. The schedule varies by route and date/time.

Short Line Trailways and Susquehanna Trailways bus companies also service Chemung County residents and provide daily service to and from the Elmira Transportation Center. Coach USA operates the Short Line Trailways routes, which provide daily service from Elmira to destinations in the states of New York and New Jersey. Susquehanna Trailways offers daily service from Lockhaven, PA to Elmira.



Transportation Opportunities and Constraints

NYS Route 17 upgrade to I-86

The section of Route 17 that runs through the Village was officially upgraded to I-86 at the end of March 2008, now that the physical conversion of Route 17 to a raised highway is complete. This upgrade is expected to bring diverse economic benefits to the region, most importantly making long distance travel through Chemung County more attractive. In addition to the higher volume of through-traffic that has been predicted, the project is intended to raise the status of Chemung County as a center for business and to create a more viable tourism industry.¹¹ It has also improved overall safety for travel on I-86.

Although substantial benefits may be realized as a result of this project, some concerns about community cohesiveness and future development have arisen. The approximately twenty foot high wall that was constructed in order to raise the interstate highway above grade and provide noise abatement, it now separates the most southern area of the Village from its northern area. Some residents on either side of the highway had felt that they were part of separate communities and this strain on community cohesiveness is an issue that the Village may continue to face into the future. Determining complementary land uses on either side of the highway could create a sense of cohesiveness between different areas of the Village and may help to bridge the gap that has already been reported by some residents.

NYS Route 13 and NYS Route 14 Analysis

New York State Department of Transportation (NYSDOT) initiated a Corridor Management Assessment of Routes 13 and 14 in 2004 because of the NYS Route 17 upgrade to I-86 predicted \$650 million in economic development in Horseheads.¹² The Chemung County IDA began looking for new industrial and manufacturing sites in the Village to prepare for predicted industrial and commercial real estate demand, and this momentum motivated NYSDOT to study how Routes 13 and 14 would be affected by increased development activity.

The Route 13 study examined three development alternatives to accommodate the predicted development, including no change in zoning or access, change in zoning with no additional access, and change in zoning with additional access. Additional access meant the construction of a roadway that provided additional access to the Center at Horseheads and stimulated greater economic growth in the area. The study concluded by endorsing the final option, with the highest estimated development value of \$71 million.¹³

The Corridor Management Assessment also examined future development along Route 14; however unlike Route 13, this highway is already heavily developed. As a result, the study set out to identify tools to minimize the impacts of increased traffic on the community. The report recommended rezoning specified areas to retail and office/commercial zones where their impacts would be best tolerated, increasing the capacity of local roads, and modifying underlying zoning and subdivision ordinances.



Center at Horseheads to NYS Route 13 Corridor Project

The Corridor Project was commissioned in order to evaluate the feasibility of creating increased highway access to the Center at Horseheads, with the aim of stimulating economic development in the area. Although several alternatives have been examined, the preferred corridor option as of Fall 2006 intersects NYS Route 13 approximately 1,300 feet north of East Franklin Street. The proposed route then proceeds to pass through Hanson Aggregates quarry, crosses Newtown Creek and a flood control levee, and finally reaches Old Ithaca Road just north of the S.C. Hanson building. The road would be designated as an urban collector and is projected to carry approximately 10,000 vehicles per day by 2030 if built, with 10% of this total representing truck traffic.¹⁴

Two private properties, including one business, would likely be impacted by the proposed alignment. In addition, exclusive turn lanes and a traffic signal or roundabout would be required at the intersection of the proposed highway and Old Ithaca Road, and its intersection with NYS Route 13 would also require these upgrades if the surrounding areas develop as expected. A 150-foot bridge crossing Newtown Creek is also proposed, however a detailed hydraulic analysis is still needed to assure that there would be no adverse effects on the creek and adjoining lands. An environmental screening has shown that key areas of concern associated with this project include cultural resources and historic resources, active farmlands, and floodplains and flood control measures.

In addition to these concerns, some quality of life issues have been raised. Noise, air quality, and energy use would all be affected, and further studies would need to be conducted in order to gauge the significance of these effects. Within the study area, the residences along Old Ithaca Road are most vulnerable to these nuisances. The proposed project's impact on the visual environment is also worth considering, however the roadway would not cross any visually sensitive public use areas, and only a few houses would have a view of the roadway. Since the study area has already been visually impacted by Hanson Aggregates former gravel pit though, additional deleterious effects are negligible in most areas.

According to the NYSDOT, the main benefits associated with this project include increased economic activity at the Center, opening up more land for development with controlled access, and relieving some of the traffic burden that has only continued to grow on Old Ithaca Road.¹⁵ Commercial, industrial, and residential growth is a reality in the Village, and this corridor project represents the acceptance of this reality and aims to maximize the benefits that can be garnered from this growth.

Appendix H: Housing Resources

Appendix H: Housing Resources

Highlights: Opportunities and Challenges

- *The Village has a high urban housing density.*
- *There are 3,007 housing units in the Village.*
- *Approximately 95% of the existing housing units are occupied.*
- *A variety of needs have been identified: affordable housing and mid/mid-upper range options.*
- *The average household size of occupied housing units is 2.38 people for owner occupied and 1.96 people for renter occupied.*
- *Less than 5% of the existing Village structures were built after 1990.*
- *The median value for a specified owner-occupied housing unit in the Village of Horseheads is \$71,225.*

Housing

The quality of housing in a municipality reflects the quality of life and the economic development level of the community. Based on information reported in the 2000 U.S. Census, the following section presents an overview of the Village of Horseheads housing resources and incorporates age of housing stock, value of structures, occupancy, and tenure. Where relevant, comparisons with the Chemung County or the State of New York are provided.

According to the Regional Comprehensive Economic Development Strategy of the Southern Tier Central Region Planning and Development Board, housing density is greatest in the Elmira-Horseheads-Corning corridor and housing densities have not developed along the Route 17/I-86 and I-390 corridors outside of the historically established centers¹⁶.

Housing Inventory

According to the 2000 U.S. Census, the Village of Horseheads consists of a 3.9 square mile land area with 3,007 housing units, which gives an average density of 771 housing units per square mile. Of the total number of housing units in this municipality, 2,862 are occupied and 145 are vacant. There are 3,006 urban housing units inside urbanized areas and one housing unit considered rural.



The 2000 U.S. Census reports that among the total 2,862 occupied housing units, 1,894 are owner occupied and 968 are renter occupied. The occupied housing units are classified in the following table.



Table 13: Occupied Housing Units by Type

Housing Type	Number
Single family detached	1,990
Single family attached	30
2 units	249
3 or 4 units	234
5 to 9 units	115
10 to 19 units	224
20 to 49 units	48
50 or more units	14
Mobile home units	95

Source: 2000 U.S. Census

Of the 145 vacant housing units 66 are for rent, 23 are for sale only, 7 are rented or sold (not occupied), 20 are for seasonal/recreational/occasional use, and 29 are vacant units for other reasons.

Table 14: Village of Horseheads housing inventory

Housing Inventory	Housing Units	Total Population	Average Household Size
Total housing units	3007	6,452	
Occupied housing units	2,862	6,416	2.24
Owner occupied	1,894	4,516	2.38
Renter occupied	968	1,900	1.96
Vacant housing units	145	N/A	N/A
For rent	66		
For sale only	23		
Rented or sold, not occupied	7		
For seasonal, recreational, or occasional use	20		
For migrant workers	0		
Other vacant	29		

Source: U.S. Census Bureau 2000 Summary File 3

The average household size of occupied housing units is 2.38 people for owner occupied and 1.96 people for renter occupied.

Age of Structures

For the Village of Horseheads, the 2000 U.S. Census reports that 719 structures were built in 1939 or earlier, 319 structures were built between 1940 and 1949 and 1,027 were built between 1950 and 1959. Almost 70% of the total numbers of standing structures in the Village were built before 1960. Less than 5% of the existing Village structures were built after 1990.



Table 15: Age of Structures

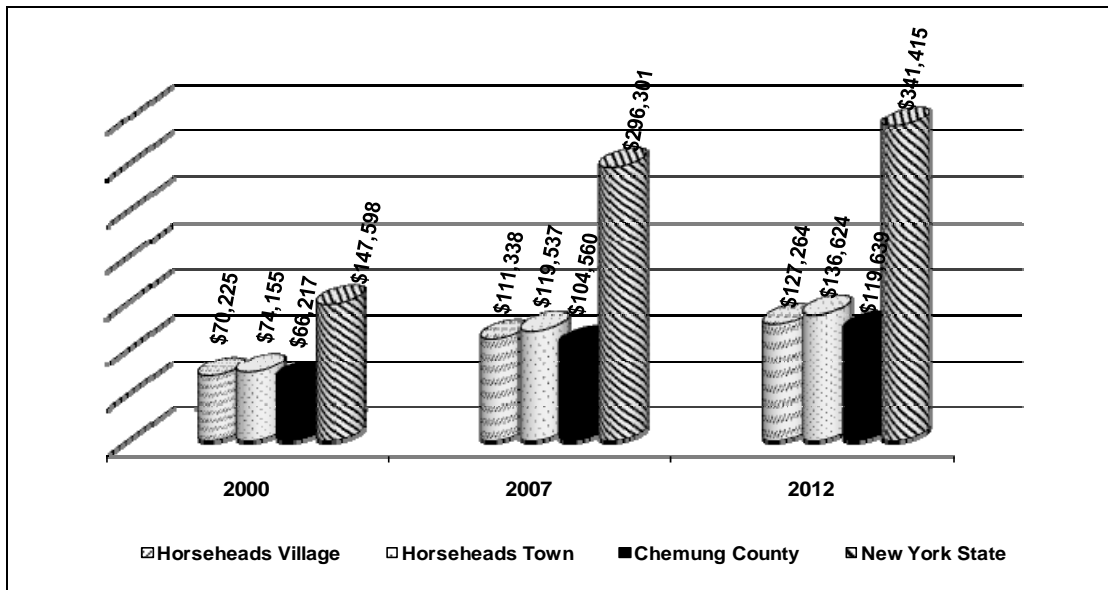
Year Structure Built	Number of Structures
Built 1999 to March 2000	10
Built 1995 to 1998	32
Built 1990 to 1994	102
Built 1980 to 1989	148
Built 1970 to 1979	300
Built 1960 to 1969	342
Built 1950 to 1959	1,027
Built 1940 to 1949	319
Built 1939 or earlier	719
Median Year Structure Built	1955

Source: U.S. Census Bureau 2000

Value of Structures

According to the 2000 U.S. Census, the values for specified owner-occupied housing units are presented in Figure 9. The median value for a specified owner-occupied housing unit in the Village of Horseheads is \$71,225, which results from values taken for specified owner-occupied housing units ranging from \$25,000 to \$400,000.

Figure 9: Value of the Specified Owner-Occupied Housing Unit in Horseheads



Source: U.S. Census Bureau 2000

In Figure 9, the median housing value in the Village is compared with the median housing values in the Town of Horseheads, Chemung County, and New York State. This graph also illustrated the projected median values for 2007 and 2012. In 2000, the median value for housing units in the Village was lower than the value for the Town and State and higher than the value for the County. The projections show an increase in the median value of the specified owner-occupied housing unit in the Village, however no change is observed relative to the Town, County, or State.

Appendix I: Municipal Services & Infrastructure

Appendix I: Municipal Services & Infrastructure

Highlights: Opportunities and Challenges:

- *The Village mayor and four trustees comprise the Village Board of Trustees that governs the Village.*
- *A five member Planning Board and a five member Zoning Board of Appeals provide decisions on land use issues in the Village.*
- *Emergency services in the Village of Horseheads are provided by a Volunteer Fire and Rescue Company, a professional ambulance service, and the Village Police Department.*
- *The Village of Horseheads' water system serves 15,000 people through 3,400 service connections in the Village of Horseheads and portions of the Town of Horseheads.*
- *The Chemung County Sewer District owns all of the sanitary sewers in Chemung County.*
- *The Horseheads Central School District educated 4,245 students in 2007.*

Village Government

Village Board

The Village Board of Trustees is comprised of four trustees and the Village Mayor. The Trustees meet the second and fourth Thursday of every month except during the months of July, August, November, and December when there is generally only one meeting on the second Thursday. The meetings are held at 7:00pm in the Council Room of the Village Hall.

Village government is responsible for the fiscal well being of the Village, along with providing services to residents and business owners which include: capital purchase and maintenance of Village roads, economic assistance, planning and development, parks and waterways, health and safety, and Village culture and recreational activities.

Village Manager

The Village of Horseheads created the position of Village Manager to provide professional management and oversight to Village operations.

Planning Board

The Village Planning Board consists of five members appointed by the Village Mayor for five-year terms. The Planning Board reviews Site Plans and provides an impartial and professional perspective on land use issues based on the long range needs of the community contained in the Comprehensive Plan or other local policy documents.



Zoning Board of Appeals

The Zoning Board of Appeals (ZBA) consists of five members who meet as needed. Under State statute, the essential function of the ZBA is to grant land area and use variances. In this capacity it protects landowners from the unfair application of the laws in particular circumstances. The ZBA also hears appeals from the decisions of the Building Inspector when interpretations of the zoning ordinance are involved.

Municipal Services

Water and Sewer Services

The Village of Horseheads' water system serves 15,000 people through 3,400 service connections in the Village of Horseheads and portions of the Town of Horseheads. The source is ground water drawn from four, seventy-foot deep drilled wells that are located within the Town of Horseheads. The total water produced in 2006 was 728 million gallons. The amount of water delivered to customers was 524 million gallons with the daily average of water pumped into the Village Water system at 2 million gallons. Village water is provided to outside users at a nominal fee.

The City of Elmira, Town of Big Flats, and the Town and Villages of Horseheads and Wellsburg have interconnected their municipal water systems so that each community is assured adequate water supply in times of emergency such as fire, localized contamination due to spills, leaks, or system failure.¹⁷

The Chemung County Sewer District owns all of the sanitary sewers in Chemung County. Chemung County Sewer District No. 1 serves an area directly north of the City of Elmira. This area includes the Village of Elmira Heights, the majority of the Village of Horseheads, and portions of the Towns of Elmira, Horseheads, Veteran, and Big Flats. The Sewer District No. 1 collection network consists of approximately 100 miles of mainline sewer that discharge to a trickling filter facility that was built in 1962 and last upgraded in 1989.¹⁸

Emergency Services

Horseheads Fire and Rescue Company

The Horseheads Fire and Rescue Company provide residents of the Village of Horseheads with Fire, Rescue, and EMS services. The members of the Fire Department work closely with the Horseheads Village Police Department to provide Village residents with emergency services. The department operates three engines, two rescue vehicles, and one aerial truck out of its single station. The station is located at 134 North Main Street, near Hanover Square in the Village of Horseheads. The Horseheads Fire Department receives approximately 600 calls annually.





Ambulance Service

NYS DOH grants a certificate of need to Erway Ambulance to provide County residents a full range of emergency and non-emergency ambulance transportation both at the Advanced and Basic Life Support levels. Erway Ambulance has 62 employees and operates nine paramedic ambulances. Erway headquarters and dispatch is located in Elmira Heights, with stations located throughout the County for rapid response. Erway maintains a station at 174 Miller Street in the Village of Horseheads.

Horseheads Police Department

The Police Department consists of twelve full-time officers, including a K-9 unit, School Resource Officer and two part-time Community Service Officers that assist with enforcing code violations. The Police Department receives more than 19,000 calls for service each year.

Public Library

The Horseheads Free Library is located at 405 South Main Street in the Village of Horseheads. The library maintains hours Monday through Saturday and is closed on Sunday.

The library provides youth programs, films, and story telling sessions throughout the week. In addition to



over 54,000 books, there are videos, compact discs, DVDs, CD-ROMS, magazines, books on tape, media sets, and electronic databases bringing the total collection size to over 63,000.¹⁹ While the library is the responsibility of the Chemung County Library District (CCLD), the Village places a high value on its convenient central location in proximity to the business district. Over time, its patronage has increased dramatically and the facility is out of capacity to perform its function. The CPC strongly

advocates the building of a new structure or expansion of the existing one, capable of handling current and future demand.

Educational Resources

The Horseheads Central School District, spanning approximately 143 square miles, is one of four school districts in Chemung County. Communities included in the district are the Town and Village of Horseheads, Big Flats, Veteran, Breesport, Pine Valley, Erin, Millport, Cayuta, Catlin, and portions of adjacent communities.

The Horseheads Central School District educated 4,245 students in 2007. As Table 16 demonstrates, this is 1.5% less than the previous year's attendance of 4,312, which corresponds to current demographic trends within the area. The majority of this decline occurred within grades 7-12. All growth occurred within Horseheads Intermediate School (grades 5-6) and Gardner Road Elementary School (grade K-4), which showed increases by 1.6% and 5.06%, respectively.

**Table 16: Student Population Changes, Horseheads Central School District, 2006-2007**

School (Grade Level)	2006 Enrollment	2007 Enrollment	% Change	% Change In Each Grade
Horseheads High School (9-12)	1,447	1,389	-4.01%	-4.01%
Horseheads Middle School (7-8)	749	723	-3.47%	-3.47%
Horseheads Intermediate School (5-6)	625	635	1.60%	1.60%
Big Flats Elementary School (K-4)	356	352	-1.12%	
Center Street Elementary School (K-4)	353	346	-1.98%	
Gardner Road Elementary School (K-4)	395	415	5.06%	
Ridge Road Elementary School (K-4)	387	385	-0.52%	0.47%
Total	4,312	4,245	-1.55%	-1.55%

Source: Horseheads Central School District General District Information, 2007.

All of the schools within the district have received additions or renovations within the past ten years except for Gardner Elementary School. The district employs more than 700 people including both instructional and non-instructional staff, and has almost 800,000 square feet of education, office, garage, and maintenance space. Its 76 school buses travel more than 862,000 miles per year and transport more than 5,000 students per day to district schools as well as private and parochial schools within the area. Through its energy management program, the district has had a “cost avoidance” of more than \$2.15 million since 1997. The district is currently beginning a \$15.3 million capital project that was approved by voters in 2006. The funding will support renovations in all district schools as well as the bus garage and is expected to take two to three years to complete.

Beyond secondary school, the region contains three major higher educational institutions: Elmira College, Corning Community College, and College Center of the Finger Lakes. The region also participates in the State BOCES system, which provides alternative education and training for high school students and adults. Furthermore, the residents in the region utilize the resources of several highly regarded nearby institutions: Alfred University, Cornell University, Ithaca College, Syracuse University, Mansfield University, Cortland Community College, and Binghamton University (formerly SUNY).²⁰

Appendix J: Economic Development

Appendix J: Economic Development

Highlights: Opportunities and Challenges

- *The average commute in Horseheads requires less time than it does on average in the State of New York or the Nation.*
- *Almost 45% of the people residing in the Village work in the Services Sector.*
- *Most people residing outside of the Village come to the Village to either dine or buy goods, alcohol, health items, and personal care items.*
- *The amount of money that Village residents spend on financial services is closest to matching national spending rates.*
- *Village residents spend significantly less on travel related services, including, but not limited to travel agency fees, transportation costs, and lodging expenses, than the average US citizen.*

Economic Profile

This section presents an inventory of the Village's economic resources in its commercial and business areas, as well as identifies industrial uses. A review of local residents' employment and occupations is also included.

Commuter Patterns

As Table 17 demonstrates, the average travel time to work has increased slightly in the past ten years, growing from 14.7 minutes to 16.4 minutes, on average. This is still almost ten minutes less than the national average of 24.4 minutes. Almost 72% of residents had commutes of less than 20 minutes, with fewer than 5% working at locations more than an hour from home.

Within this same ten-year period, the percentage of workers commuting decreased by 1% as more people followed the national trend of working from home.



Table 17: Time Travel to Work, 1990 – 2000, Village of Horseheads

Workers 16+	1990 Percentage	2000 Percentage
Did not Work at Home	98.45%	97.60%
Less than 5 minutes	7.88%	6.70%
5 to 9 minutes	19.32%	21.10%
10 to 19 minutes	45.93%	44.10%
Less than 20 minutes	73.13%	71.90%
20 to 24 minutes	12.36%	11.10%
25 to 34 minutes	7.02%	7.90%
35 to 44 minutes	2.08%	1.50%
45 to 59 minutes	1.58%	2.50%
Less than 1 hour	96.18%	94.90%
60 to 89 minutes	1.81%	1.30%
90 or more minutes	0.46%	1.40%
Worked at Home	1.55%	2.40%
Total	100.00%	100.00%
Average Travel Time to Work (in minutes)	14.70	16.40

Source: U.S. Bureau of the Census, 2000 Census Population and Housing, ESRI forecasts for 2006.

Employment Trends

Like much of the United States, Horseheads’ primary employment is in the Services Sector. Employing 40.2% of the population in 2000 and almost 45% in 2007, this sector will most likely maintain its principal position within the Village (see Table 18). Besides modest gains in Retail Trade and Construction, Services grew at the expense of every other sector within Horseheads.

Table 18: Village of Horseheads Resident Employment, 2000 and 2007

Classification	2000	Cumulative Total	2007	Cumulative Total
Services	40.2%	40.2%	44.9%	44.9%
Manufacturing	21.5%	61.7%	16.4%	61.3%
Retail trade	13.6%	75.3%	14.1%	75.4%
Public Administration	8.3%	83.6%	8.1%	83.5%
FIRE, rental and leasing	4.2%	87.8%	4.2%	87.7%
Construction	3.7%	91.5%	4.5%	92.2%
Wholesale trade	3.6%	95.1%	3.4%	95.6%
Transportation/Utilities	2.8%	97.9%	2.6%	98.2%
Information	2.1%	100.0%	1.8%	100.0%
Agriculture/ Fishing/ Mining	0.0%	100.0%	0.0%	100.0%

Source: U.S. Bureau of the Census, 2000 Census Population and Housing, ESRI forecasts for 2006.



Similar to many Upstate communities, Horseheads' second highest employment sector is within Manufacturing. While this sector has lost much of its share of employees over the past fifteen years, over 16%, or a little more than one in six employed people within the Village work in some sort of manufacturing capacity. When combined with the Services and Retail sectors, these three sectors account for more than 75% of the total employment within the Village of Horseheads.

Supply and Demand

The North American Industry Classification (NAIC) system organizes all North American businesses into individual job sectors. These sectors provide headings by which to compare the sales figures, employment rates, and market share of each business type. For example, by grouping the individual automotive repair businesses together, one can get a picture of the collective health of the mechanic job market or how much money is spent for those services in any given year. In terms of supply and demand, this information can be used to identify the supply of businesses within an area and examine whether it sufficient for regional needs.

In the case of Horseheads, this information is important in discerning the amount of tax dollars the Village is capturing compared to what it may be capable of capturing. Table 19 provides a breakdown of Horseheads supply of businesses, the consumer demand for these services, and the consequent leakage or surplus.

A score of 100, such as Horseheads has in the Specialty Food Stores sector, suggests that no businesses within the Village currently meet the sector's demand. Consumers are required to seek businesses outside the Village to meet these needs, consequently pushing tax dollars away. Any number still positive, but less than 100, suggests that while some of that sector's demand is met by internal businesses, there is still insufficient sales to supply local consumers. A Leakage/ Surplus of zero is indicative of a retail sector that meets the local demand, but does not meet any more than that.

On the other hand, any number that is negative means that the particular good is an export, having less demand for it within the Village than is needed to sustain those sales figures. This is indicative of a sector that draws consumers from neighboring areas into the locality. For instance, Beer, Wine, and Liquor stores have a demand within the Village of less than \$1 million, but the supply is almost \$8 million. This suggests that a significant amount of the business within this sector draws from the region outside of the Village.

As Table 19 demonstrates, the largest exports from the Village are alcohol, furniture, restaurants, and health and personal care items. The retail industries with the greatest lost sales opportunities (in dollars) within the Village are grocery stores, hobby stores, car dealers, and automotive parts dealers. While they may not have the greatest percentage leakage, they do have the highest dollar value leakage. Concentrating on attracting these businesses into the Village would have the largest positive retail impact.



Table 19: Village of Horseheads Retail Sales Leakage and Market Capture

Retail Category	Supply (Retail Sales)	Demand (Retail Potential)	Gap	Leakage/Surplus
Motor Vehicle & Parts Dealers	\$7,187,156	\$15,631,796	(\$25,203,011)	37.0
Automobile Dealers	\$1,667,251	\$13,262,925	(\$21,279,667)	77.5
Other Motor Vehicle Dealers	\$556,809	\$1,151,159	(\$14,979,484)	34.8
Auto Parts, Accessories, and Tire Stores	\$4,953,096	\$1,217,712	(\$12,986,773)	-60.5
Furniture & Home Furnishings Stores	\$17,333,147	\$2,353,663	(\$9,826,245)	-76.1
Furniture Stores	\$14,654,181	\$1,667,408	(\$7,043,425)	-79.6
Home Furnishings Stores	\$2,678,966	\$686,255	(\$4,674,803)	-59.2
Electronics & Appliance Stores	\$1,147,974	\$2,213,517	(\$4,239,621)	31.7
Bldg Materials, Garden Equip. & Supply Stores	\$5,355,737	\$2,006,111	(\$3,735,384)	-45.5
Building Material and Supplies Dealers	\$5,355,737	\$1,881,301	(\$3,474,436)	-48.0
Lawn and Garden Equipment and Supplies Stores	\$0	\$124,810	(\$3,349,626)	100.0
Food & Beverage Stores	\$11,970,468	\$14,442,117	(\$2,598,249)	9.4
Grocery Stores	\$4,050,361	\$13,162,700	(\$2,076,554)	52.9
Specialty Food Stores	\$0	\$402,735	(\$1,992,711)	100.0
Beer, Wine, and Liquor Stores	\$7,920,107	\$876,682	(\$1,228,921)	-80.1
Health & Personal Care Stores	\$13,543,292	\$3,717,047	(\$905,246)	-56.9
Gasoline Stations	\$5,930,653	\$6,764,522	(\$328,034)	6.6
Clothing and Clothing Accessories Stores	\$4,602,248	\$4,410,987	(\$308,485)	-2.1
Clothing Stores	\$3,885,096	\$3,557,062	(\$191,261)	-4.4
Shoe Stores	\$563,993	\$529,853	(\$34,140)	-3.1
Jewelry, Luggage, and Leather Goods Stores	\$153,159	\$324,072	\$106,734	35.8
Sporting Goods, Hobby, Book, and Music Stores	\$496,465	\$1,642,670	\$114,917	53.6
Sporting Goods/Hobby/Musical Instrument Stores	\$396,639	\$1,095,045	\$124,810	46.8
Books, Periodical, and Music Stores	\$99,826	\$547,625	\$170,913	69.2
General Merchandise Stores	\$7,115,301	\$2,440,498	\$206,543	-48.9
Department Stores (Excluding Leased Depts.)	\$4,052,260	\$1,975,706	\$332,263	-34.4
Other General Merchandise Stores	\$3,063,041	\$464,792	\$402,735	-73.6
Miscellaneous Store Retailers	\$2,198,330	\$1,293,084	\$447,799	-25.9
Florists	\$408,385	\$99,900	\$460,792	-60.7
Office Supplies, Stationery, and Gift Stores	\$40,215	\$557,458	\$517,243	86.5
Used Merchandise Store Retailers	\$59,433	\$174,350	\$524,451	49.2
Other Miscellaneous Store Retailers	\$1,690,297	\$461,376	\$594,350	-57.1
Non-store Retailers	\$0	\$1,317,506	\$698,406	100.0
Electronic Shopping and Mail-Order Houses	\$0	\$332,263	\$883,869	100.0
Vending Machine Operators	\$0	\$460,792	\$1,065,543	100.0
Direct Selling Establishments	\$0	\$524,451	\$1,146,205	100.0
Food Service & Dining Places	\$34,425,143	\$9,222,132	\$1,317,506	-57.7
Full-Service Restaurants	\$28,089,801	\$6,813,134	\$2,471,649	-61.0
Limited-Service Eating Places	\$6,335,342	\$2,095,721	\$8,444,640	-50.3
Special Food Services	\$0	\$206,543	\$9,112,339	100.0
Drinking Places (Alcoholic Beverages)	\$0	\$106,734	\$11,585,674	100.0

Data Note: Supply (retail sales) estimates to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) represents the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor is a measure of consumer demand relative to supply, ranging from 100 (total surplus) to (-) 100 (total leakage). ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. *Source: Business data provide by InfoUSA, Omaha, NE Copyright 2004. All rights reserved. 2005, ESRI Forecasts.*



It is important to note this is an analysis of the retail consumer goods sector. This does not examine business-to-business purchases or sectors that tend to be mainly exports in nature, such as manufacturing. These types of businesses usually require individual fiscal impact analyses in order to weigh their benefits to the community relative to their costs.

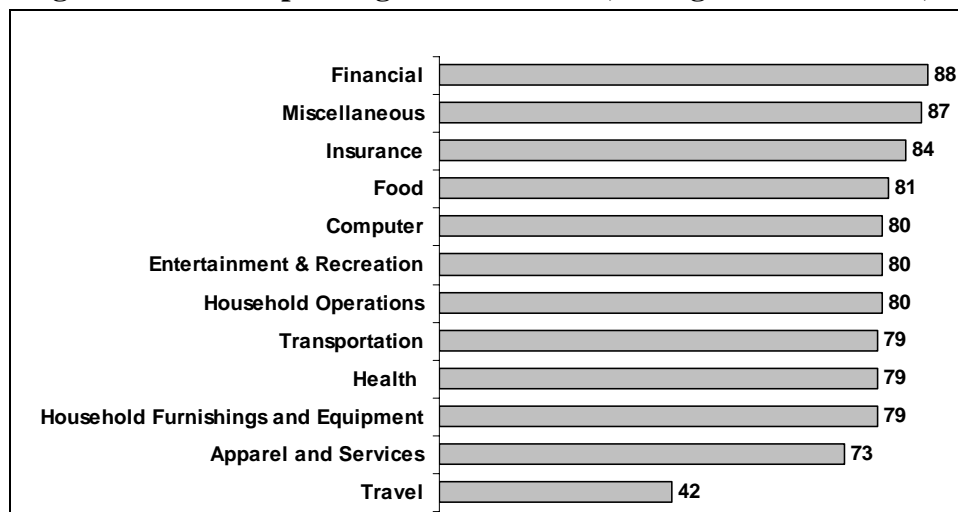
Retail Sales and Consumer Spending

Spending Potential Index (SPI) measures the level of spending within an area and compares it to national spending trends in the same category. A score of 100 within a purchasing sector suggests that the specific area spends the same amount on that good as the national average. A score lower than 100 suggests that consumers are either 1) buying the same amount as the national average but spending less for it or 2) buying less than the average US denizen buys.

Since cost of goods sold in Horseheads is less than the national averages for consumer goods, Horseheads would only have SPI's greater than 100 if an amount much greater than the national average was spent on that sector. This is illustrated by Figure 10, which shows that Horseheads is spending below the national average in every area.

While SPI's are lower than the national average in Horseheads, they still show, relative to each other, how Horseheads residents spend their money. Financial services purchases are the closest in line with national trends. This is mainly due to the fact that Horseheads has a larger portion of its population in older age brackets. These populations are more likely to purchase financial services, bringing the spending on this sector more in line with national trends than others. Likewise, Travel is substantially lower than the average. This is at least partially due to the fact that older populations are less likely to take trips.

Figure 10: Retail Spending Potential Index, Village of Horseheads, 2007



Source: Business data provide by InfoUSA, Omaha, NE Copyright 2004. All rights reserved. 2005, ESRI Forecasts

Miscellaneous goods (personal care products, school books and supplies, and smoking products) tend to be inelastic between communities. Hence, we observe spending that is closer to national trends than any other sector besides Financial Services.



Business Survey Summary

The Village of Horseheads conducted a Business Survey in late November and early December of 2007 to provide an additional opportunity for business owners and managers to contribute to the planning process. The survey was accessible online at the Village website. Additionally, CPC members met with individual business owners and managers to solicit survey information and encourage participation in the project.

The survey included 13 multiple-choice and 10 fill-in-the-blank questions. Full Survey results are included in Volume II. The intent of the survey was to gauge private sector opinion about municipal services and the local economic atmosphere.

According to the 2002 Economic Census, there were 234 business establishments within the Village. Forty-nine of them completed surveys, resulting in a response rate of nearly 21%. Responses to the survey were tabulated and illustrated in table and chart form. The questions with the most valuable information were included within the analysis. The complete results of all the survey questions can be found in the Appendix M.



Regional Economy

Economic Development in Chemung County

In early 2007, Chemung County approved a new Economic Development Plan. In it, the County outlined the five main goals for the region:

Business Retention and Expansion: Business retention is the highest priority in any economic development strategy. Maximum economic development efforts will be made to identify and respond to the needs of existing businesses to ensure their long-term viability and growth.

Workforce Development: Human capital is an increasingly important element in today's technology driven environment. Every community has a potential site to be developed, but a skilled, educated workforce is necessary for all businesses to remain competitive and profitable in today's global marketplace. Chemung County needs to be positioned to provide the type of workforce needed to stay competitive in the future.

Downtown Revitalization: "Main streets" are valuable to all communities, not only for economic reasons, but also as the visual focus point, which helps to define the character of the community. "Main Streets" reflect the pride and spirit of a community and are often the first thing that a visitor or prospective investor sees.



Business Development and Marketing: Traditional economic development includes fostering a vital business environment, promoting the development of new business establishments, pursuing opportunities to recruit businesses to the County, and providing the necessary resources – infrastructure and incentives – to attract and support those businesses.

Community Resources and Promotion: Efforts will focus on the promotion of the high quality of life enjoyed in Chemung County and utilizing these elements to retain youth and support living, visiting, and investing in the County.

Top County Employers

CAF-USA: CAF-USA is an international market leader in designing, manufacturing, maintaining, and supplying equipment and components for railroad systems. The Elmira plant of the CAF-USA acts as the North American Headquarters.

Corning Incorporated: Corning which employs over 1,000 County residents, produces a diverse array of products in telecommunications, semiconductors, environmental, and life sciences markets. Headquartered in Corning, they are an industry leader and focus on high-impact growth opportunities.

Emhart Glass: Emhart Glass, located in Elmira, is one of the world's leading international suppliers of equipment, controls, and parts to the glass container industry. With broad-based expertise in glass container forming, glass conditioning, gob forming, ware handling, cold end inspection, and quality assurance, the company's machines and systems are established as standard products worldwide.

Hardinge Incorporated: Hardinge has been providing highly reliable precision machine tooling solutions for over 100 years. Headquartered in Elmira, it employs as many as 600 people.

Hilliard Corporation: The Hilliard Corporation, independently owned and located in Elmira, manufactures motion control products, oil filtration and reclaiming equipment, starters for industrial gas, diesel engines and gas turbines, and plate and frame filter presses used in the food and beverage industry. Employing between 400 and 450 people, it offers a high level of customization for specific client needs.

Howell Packaging: Howell Packaging is a division of F.M. Howell and Company. Founded in Elmira in 1883, it provides full-service packaging capabilities to the pharmaceutical, industrial, and consumer products industries. Employing between 300 and 350 people, it has worked in all aspects of packaging, from design and manufacturing to assembly, distribution, and inventory management.

Imaging and Sensing Technology Corporation: Founded in 1988 in Horseheads, IST is a worldwide leader in the design and manufacture of advanced electronic and component systems in nuclear and high temperature environments. Its products provide operational efficiency as well as critical information to safeguard those who work in, or are exposed to, hazardous conditions.



Kennedy Valve: Headquartered in Elmira and employing 400 to 500 people, Kennedy Valve, a division of McWane Incorporated, offers the most complete product line and support system of AWWA and UL/FM fire hydrants and valves for the domestic and international markets.

Schweizer Aircraft Corporation: Schweizer Aircraft Company, which currently employs nearly 600 people and expects to add another 100 to 150 over the next year, produces helicopters, reconnaissance aircraft, unmanned vehicles, and aerospace subcontracting.

Street Paul Travelers: Headquartered in Street Paul, Minnesota, Travelers provides commercial and personal property – casualty insurance, and asset management services. Elmira’s office employs 225 people to manage commercial insurance accounts nationwide.

Vulcraft of New York, Incorporated: Vulcraft employs almost 300 people at its plant in Chemung, New York. There, it produces carbon steel joists, joist girders, composite floor joists, special profile steel trusses, and floor and roof deck materials.

General Revenue Corporation: Employing between 450 and 500 people, GRC offers full-service collection programs tailored to education, government, utility, automotive, telecommunication, retail, and shipping client needs nationwide. With a client base of over 800 institutions, GRC is the largest college and university-focused collection agency in the country.

Synthes USA: Located in Horseheads, this manufacturing facility produces instruments, implants, and biomaterials for the surgical fixation, correction, and regeneration of the human skeleton and its soft tissues. This local Synthes plant employs between 300 and 350 people.

Chemung County Jail: The Chemung County Jail is located in Elmira and employs approximately 100 full-time and part-time employees. Sixty-six of these employees are corrections officers while the remaining positions are represented by lieutenants, sergeants, nurses, one captain, and one clerk.

Chemung County Health Center: Located in Elmira, the health center employs the equivalent of approximately 275 persons working full time.²¹ Since some health center employees work much more than 40 hours a week while others work much less, hospital employment data is sometimes reported in this way.

Correctional Facilities: Chemung County is the site of two major State of New York Correctional Facilities. The Southport Correctional Facility (located in the Town of Southport) employees between 400 and 450 while the Elmira Correctional Facility (City of Elmira) employees between 800 and 850 individuals.

Top Village Employers

Cameron Manufacturing and Design: This manufacturing and design company is a producer of metal fabrications, custom machinery, and engineering services. By the end of 2007 after sales had increased by over 30%, Cameron Manufacturing and Design increased its workforce to 190 persons.²²



Thomas and Betts Corp., LRC Electronics: Thomas and Betts Corporation is an international company that produces cable connectors for consumer and industrial use. In 2006, the Horseheads branch employed 285 full-time employees and 27 part-time employees.

Village Government: The Village of Horseheads employs approximately 57 people, including both full-time and part-time employees. This number increases during the summer months to account for lifeguards and other seasonal employees.

Horseheads Central School District: The Horseheads Central School District encompasses approximately 143 square miles and educated 4,245 students in 2007. More than 700 people are employed in the school system, including both instructional and non-instructional staff. Although all school district employees do not work within the boundaries of the Village itself, the school district is more representative of a top local employer than a County employer.

Appendix K: Maps

Appendix L: Bibliography

Appendix L: Bibliography

- ¹ Horseheads Village History- <http://www.horseheads.org/index.php?n=About.History>
- ² CEDS: Chemung, Schuyler, Steuben Counties, Southern Tier Central Regional Planning and Development Board. June 2007. <http://www.stcplanning.org/usr/2008CEDS.pdf>
- ³ Soil Survey of Chemung County, New York, by C. S. Pearson and J. Schwartz, Cornell University Agricultural Experiment Station, 1933
- ⁴ Artificially formed land, either by filling or dredging
- ⁵ The definition of a hydric soil is a soil that formed under conditions of saturation, flooding, or ponding long enough during the growing season to develop anaerobic conditions in the upper part. The concept of hydric soils includes soils developed under sufficiently wet conditions to support the growth and regeneration of hydrophytic vegetation. Soils that are sufficiently wet because of artificial measures are included in the concept of hydric soils. Also, soils in which the hydrology has been artificially modified are hydric if the soil, in an unaltered state, was hydric.
- ⁵ U.S. Fish and Wildlife Service, New York Field Service, www.fws.gov/northeast/nyfo/es/section7.htm
- ⁷ Village of Horseheads: <http://www.horseheads.org/index.php?n=Parks.Activities>
- ⁸ The Horseheads Marsh Trail by Bryan Samson, Catharine Valley Trail. Trail News. Issue No.5, Spring 2003
- ¹⁰ Southern Tier Central Regional Planning and Development Board. "Regional Comprehensive Economic Development Strategy." June 2007.
- ¹¹ Destination 2025: Transportation Planning for the Future. Elmira-Chemung Transportation Council. December 2004.
- ¹² Destination 2025: Transportation Planning for the Future. Elmira-Chemung Transportation Council. December 2004.
- ¹³ Destination 2025: Transportation Planning for the Future. Elmira-Chemung Transportation Council. December 2004.
- ¹⁴ Center at Horseheads Highway Corridor Analysis. Southern Tier Economic Growth in association with Elmira-Chemung Transportation Council. October 2006.
- ¹⁵ Correspondence with NYSDOT. January 7, 2008.
- ¹⁶ www.stcplanning.org/usr/2008CEDS.pdf
- ¹⁷ CEDS: Chemung, Schuyler, Steuben Counties, Southern Tier Central Regional Planning and Development Board. June 2007. <http://www.stcplanning.org/usr/2008CEDS.pdf>
- ¹⁸ <http://www.chemungcounty.com/index.asp?pageId=207>
- ¹⁹ <http://www.ccl.d.lib.ny.us/horseheads.htm>
- ²⁰ <http://www.stcplanning.org/usr/2008CEDS.pdf>
- ²¹ <http://www.hospital-data.com/hospitals/CHEMUNG-COUNTY-HEALTH-CENTER-ELMIRA.html>
- ²² <http://www.stargazette.com/apps/pbcs.dll/article?AID=/99999999/BUSINESS0201/70226037/1169>

Appendix M: Public Outreach

The Village of Horseheads conducted a Business Survey in late November and early December of 2007 to provide an additional opportunity for business owners and managers to contribute to the planning process. The survey was accessible online at the Village website. Additionally, CPAC members met with individual business owners and managers to solicit survey information and encourage participation in the project.

The survey included 13 multiple-choice and 10 fill-in-the-blank questions. Full Survey results are included in Appendix M. The intent of the survey was to gauge private sector opinion about municipal services and the local economic atmosphere. The Survey is as follows:

Village of Horseheads

CONFIDENTIAL BUSINESS SURVEY

This survey has been designed to aid in the development of the Village of Horseheads Comprehensive Plan. Your responses will be tallied and presented to the Comprehensive Plan Action Committee to gather a consensus as to the goals for the economic development portion of the plan. Please answer the following questions to the best of your ability.

YOUR ANSWERS ARE CONFIDENTIAL, AS YOU ARE NOT REQUIRED TO SIGN OR REVEAL YOUR NAME ANYWHERE ON THE FORM.

Please return your survey by **Friday, December 14, 2007** to the Clerk's Office at the Village Hall.

The survey may also be completed online by going to the Village Website (<http://www.horseheads.org>) and clicking on "Horseheads Business Survey."

Thank you for participating in this survey.

1. Please check one that best describes your business: (answer required)

- Retail Professional services (lawyer, doctor, architect or other)
 Restaurant/bar Finance, insurance or real estate
 Manufacturing Other (specify) _____
 Tradesman / Contractor

2. Your business in the Village of Horseheads is

- Headquarters Branch The only location

3. How long have you been operating your business in the Village of Horseheads?

- 0-2 years 6-9 years 15 years or more
 3-5 years 10-14 years

4. Why have you chosen to locate your business in the Village of Horseheads? Check all that apply

- Workforce Location of Consumers
 Infrastructure Proximity to Personal Residence
 Transportation Accessibility Proximity to Friends or Family
 Real Estate Affordability Other (specify) _____

5. How many people do you employ, including yourself?

Full-time _____ Part-time _____ Seasonal _____

6. What is the typical salary range of your employees? You may check more than one. (optional)

Salary	Full-Time	Part-Time	Seasonal
Under \$10,000	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$10,000 - \$19,999	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$20,000 - \$29,999	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$30,000 - \$39,999	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$40,000 - \$49,999	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$50,000 - \$69,999	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Over \$70,000	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Is the area's labor force appropriately suited for your business or industry?

Yes No If No, why not:

8. Have you been in contact with any workforce development organizations?

Yes No If Yes, which ones:

9. How would you characterize the local business climate when compared to ten years ago?

Improving Deteriorating Stable

Don't Know

10. What, if anything, has changed? How do you see the business climate changing in the next ten years?

11. Are you considering any changes for your business over the next year? Check all that apply:

- Relocating your business
- Expanding services or product line
- Hiring additional employees
- Expanding or renovating your space
- Selling or closing your business
- Other (specify)_____

12. If you were considering expanding your current business, when and where would you expand?

13. What conditions would prompt you to consider relocating your business outside of the Village of Horseheads?

14. In the past five years, have your sales revenue:

- Increased?
- Decreased?
- Stayed the same?

15. What percentage of your customers are:

- Tourists _____ %
- Residents _____ %
- Businesses _____ %
- Don't Know _____

16. Who are your primary customers:

- Horseheads Residents
- Local Businesses from outside the Village
- Local Residents from outside the Village
- Tourists
- Horseheads Businesses
- Non-Local Businesses
- Non-Local Customers

17. Please rank the five most important improvements required to encourage shopping, visiting, and doing business in the Village from 1 to 5, with 1 being the very most important improvement.

- ___ Building Improvements
- ___ Façade Improvements
- ___ Better Parking
- ___ Sidewalk Improvements
- ___ Cultural opportunities
- ___ Improved Signage
- ___ Greater diversity of shops
- ___ Enhanced marketing
- ___ Landscaping
- ___ Special events
- ___ Expanded Business hours
- ___ Expanded Utilities

18. If the Village created the following economic development programs, would you be interested in participating? Check as many as you would like.

- Capital Improvement Grant Programs
- Low/ Zero-Interest Loan Programs
- Entrepreneurial Training
- Façade Improvement Program
- Business Improvement District
- Workforce Training

19. What, if anything, needs to be done to enhance the viability and success of the economy in the Village of Horseheads? Select all that apply.

- Tax Incentives
- Architectural Design Guidelines (i.e., façade and sign requirements)
- Business Attraction Program
- Community Events
- Acquire Properties in Tax Default
- Inventory Vacant and Underutilized Properties
- Improve Local and Regional Marketing Effort
- Create a Citizen Volunteer Committee for Economic Development
- Create a full time Village Economic Development position
- Develop and expand a Business Association
- Other (specify)_____

20. What factors or amenities of the Village are beneficial to your business? Please list and/or explain as many as you can.

21. What factors or amenities of the Village adversely affect your business? Please list and/or explain as many as you can.

22. Would you be available for follow-up questions?

- Yes No

If yes, please provide contact information:

Name: _____

Phone: _____

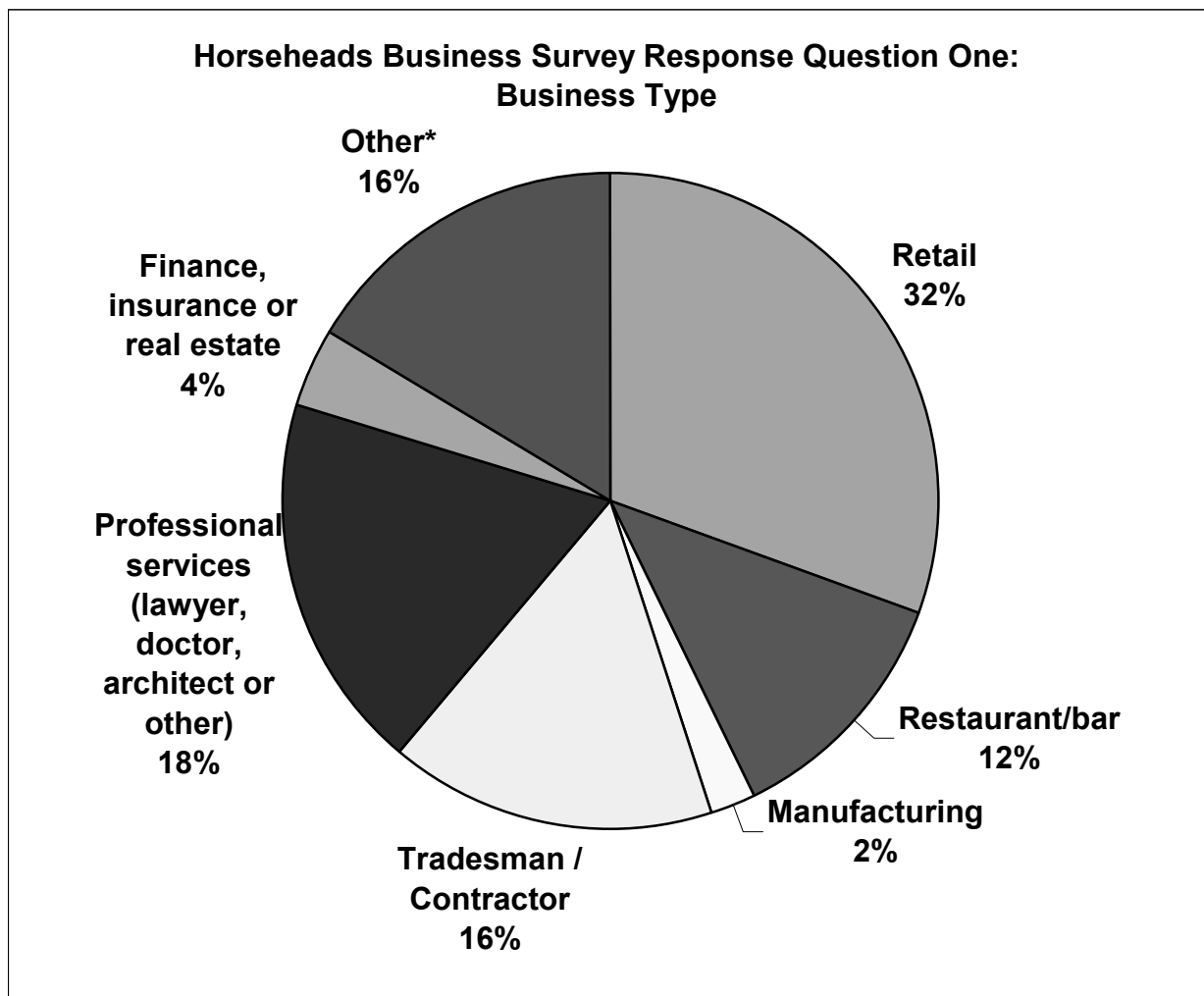
23. Please add any other comments you feel would be helpful in the development of the Village of Horseheads Comprehensive Plan.

Thank you for your time. Please do not hesitate to contact Dave Radin or Mike Stenpeck, Co-chairs of the Village of Horseheads Comprehensive Plan Action Committee, if you have any questions or concerns.

According to the 2002 Economic Census, there were 234 business establishments within the Village. Forty-nine of them completed surveys, resulting in a response rate of nearly 21 percent. Responses to the survey were tabulated and illustrated in table and chart form. The questions with the most valuable information were included within the analysis. The complete results of all the survey questions can be found in the appendix, while the following discussion highlights the most important points of the Business Survey:

Question One

Of the 49 responses, 30.6 percent were retail establishments, 18.4 percent were professional services, and both the tradesman and motel/ hotel owners were 16.3 percent each. Almost 35 percent of these stores were the headquarters. The majority (36.7%) of them were the only location, while 28.6 percent were a branch store. This is close to the general breakdown of businesses within the Village, which means the survey is fairly representative of the Village business makeup.



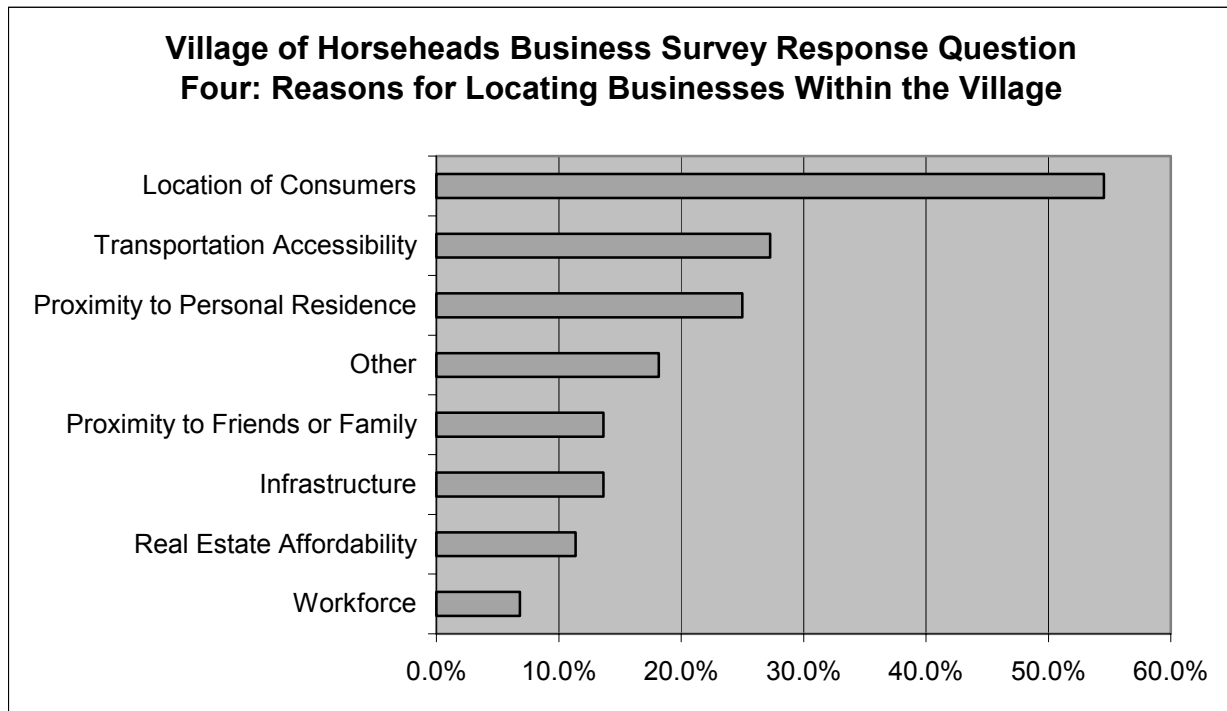
* Other responses included a Hotel, Commercial Landlord, Car Rental Agency, Private Investigator, a flooring, lighting, electrical installation and repair business, and some Motels.

Question Three

Nearly 70 percent of the respondents have operated within the Village for 15 years or more, with over 80 percent of the businesses that responded greater than 9 years old. No businesses established in the past two years responded to the survey, but 12.5 percent were business that began within the last 3-5 years. Businesses 6-9 years old made up 6.3% of the total businesses. This is a good mix, as the more established companies provide insights into the long-term business trends for the Village, while the new ones can provide details regarding the challenges of starting a new business within Horseheads.

Question Four

Over half of the businesses surveyed listed the location of consumers as the key reasons for locating within the Village of Horseheads. This was by far the most popular reason. The second most important response, with support from 27.3 percent of businesses, was transportation accessibility. Proximity to personal residence also ranked high for 25 percent of them. Many business owners also wrote in other reasons, ranging from the school and police services quality to affordability and ease of dealing with the Village. Most businesses have opened in Horseheads because the Village has a market for the business' product and because it is an enjoyable place to live. These owners most likely originate from the area or are drawn to an area specifically like Horseheads, and started businesses they thought would serve local demand. Keeping these owners happy requires attention to all aspects of quality of life. The “small town” feel must be maintained while maintaining a thriving economic base. It also requires marketing to people within the region, as these are the people buying from these businesses.



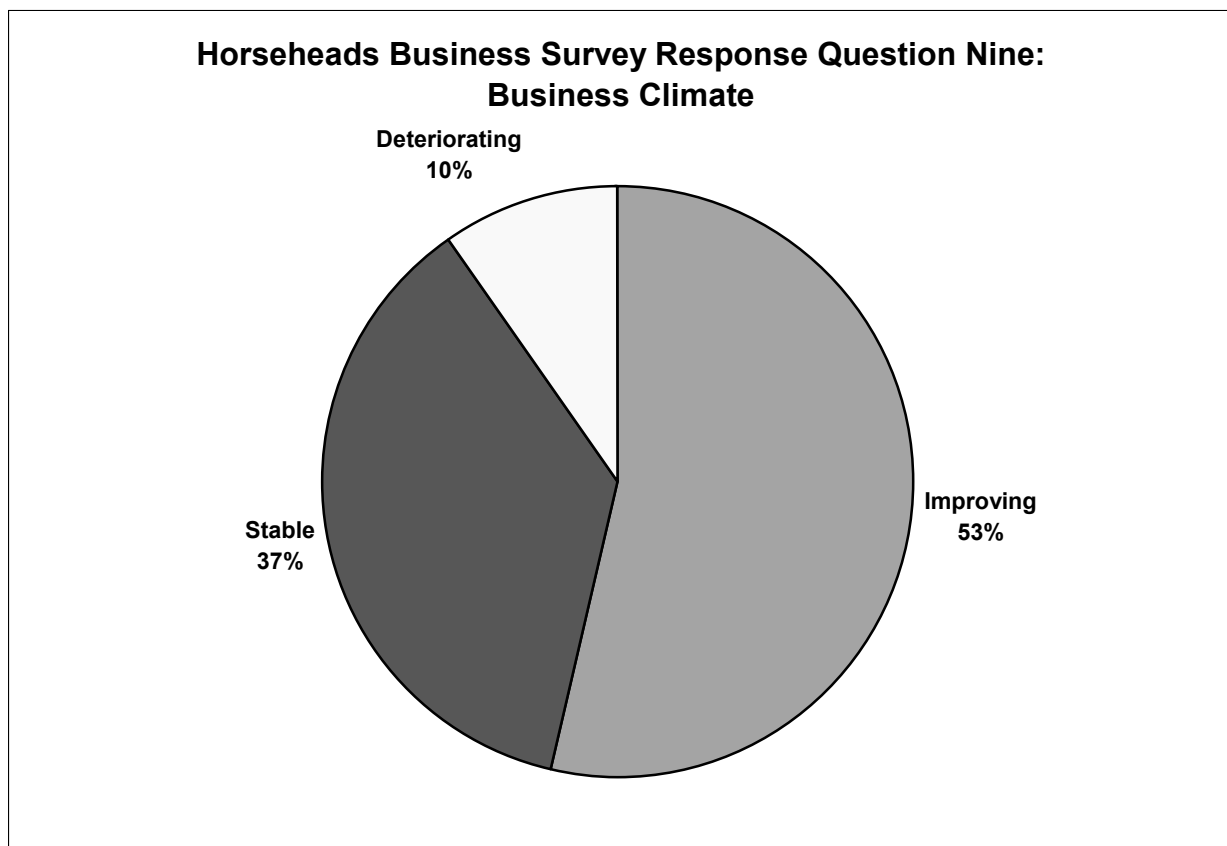
* Other included reasons ranging from the school and police services quality to affordability and ease of dealing with the Village.

Question Seven

The vast majority of businesses (95.6%) found the area's labor force to be appropriately suited for their needs. Of the ones that found them inadequate, the reasons were that trained secretarial is hard to find and that there is a lack of local training facilities.

Question Nine

Slightly more than 90 percent of businesses find the local business climate to be stable or improving. Nearly 54 percent consider it improving while only 9.8 percent consider it to be deteriorating. This upbeat trend is helpful in encouraging further business attraction and development. Businesses are attracted to growth areas.



Question Ten

When asked what, if anything, had changed while working in Horseheads, multiple business owners and managers observed an increase in retail jobs, a decrease in manufacturing jobs, an expansion of the economy to a global scale, and an overall increase in competitiveness. Many are starting to see a positive growth in business since the completion of the Horseheads section of I-86. In terms of future expectations, many felt New York had to become more business friendly and address its high tax burden relative to the other states in the country. Many saw the need for

business to become more technologically savvy and adapt to the fast paced changes taking place. Policies that reduce tax burden, encourage technological infrastructure, and make doing business less difficult would be helpful to the local economy.

Question Eleven

Over 35 percent of businesses are planning to expand services or product lines within the next year. Almost 25 percent expect to hire additional employees or expand/ renovate space. More than 32 percent saw limited to no change occurring over the next year. Only one business that responded suggested relocating the business. In general, businesses are doing well within the Village. This is good because it encourages businesses to stay in the area.

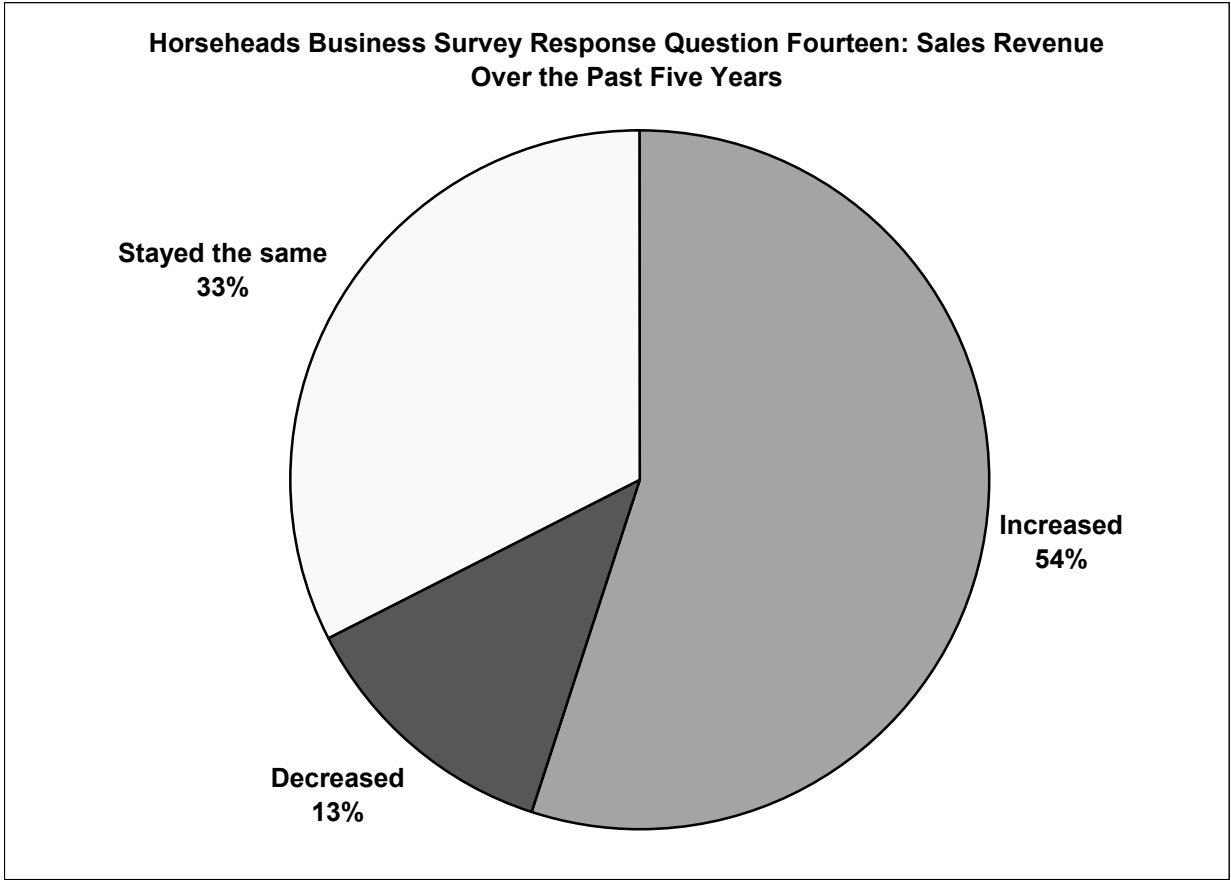
Are you considering any of the following changes for your business over the next year? Check all that apply:		
Answer Options	Response Percent	Response Count
Expanding services or product line	35.1%	13
*Other	32.4%	12
Hiring additional employees	24.3%	9
Expanding or renovating your space	24.3%	9
Selling or closing your business	10.8%	4
Relocating your business	2.7%	1

*Other includes:

- No changes;
- Cosmetic changes only;
- Opening an additional location;
- No changes in the next year, but maybe in two to three years.

Question Fourteen

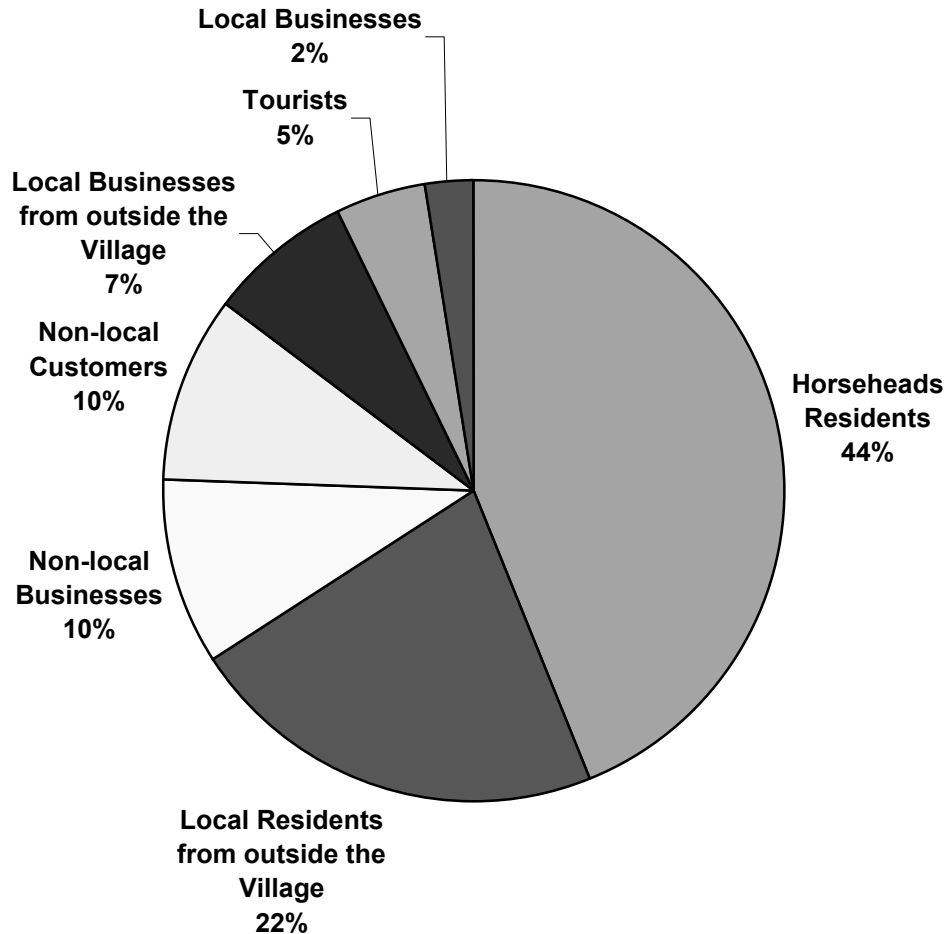
Over the past five years, only 12.5 percent of Horseheads businesses experienced a decline in sales revenue. Of the remaining 87.5 percent, 32.5 percent reported stagnant figures, while 55 percent experienced sales revenue growth.



Question Sixteen

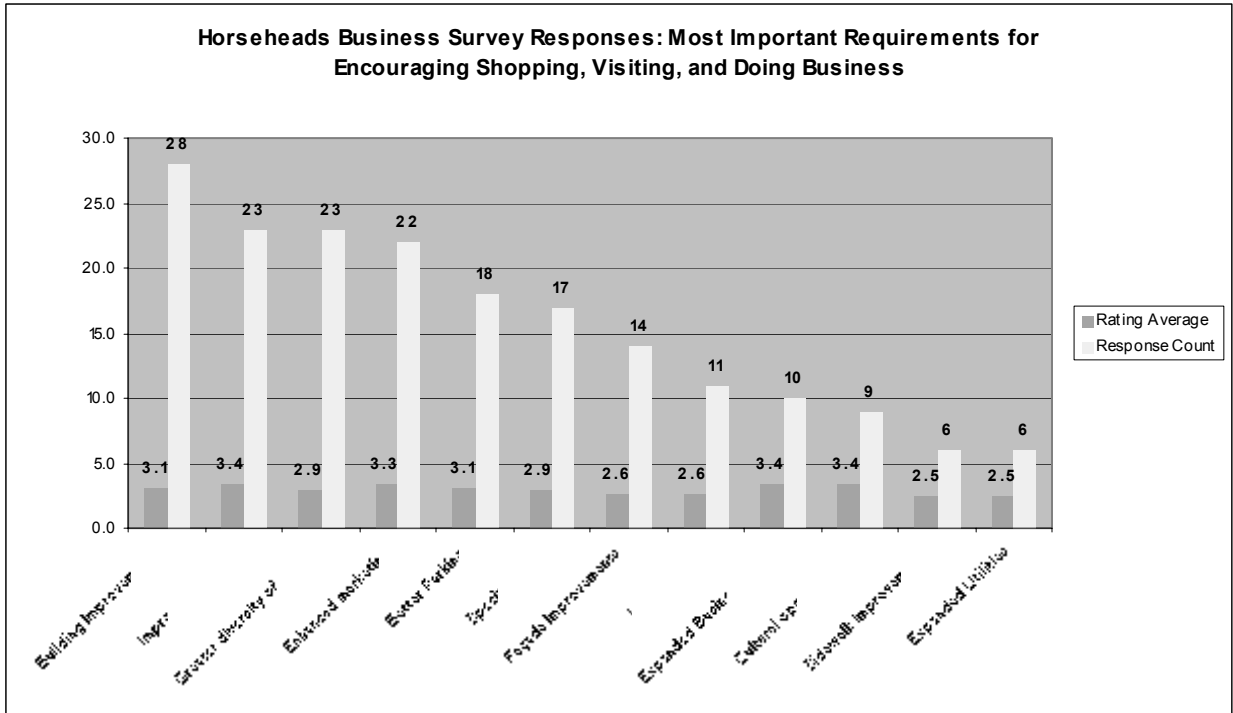
Making up 44 percent of the businesses responding to this question, Horseheads Residents are by far the primary customers. The second highest portion of customers, at 22 percent, is Local Residents from outside the Village. Combined, residents in and around Horseheads make up more than 65 percent of the customer base. Non-local businesses and customers make up less than 20 percent of primary customers. Any Economic Development programs invested in by the Village should include an analysis of local residents needs and possible growth to accommodate them.

**Horseheads Business Survey Response Question Sixteen:
Primary Customers**



Question Seventeen

When asked what improvements are most important for encouraging shopping, visiting, and doing business in the Village, the answer that was most ranked in the top five was Building Improvements. Twenty-eight business owners or managers felt this to be one of the top five concerns, and seven listed it as the top concern. Only Improved Signage was chosen number one more frequently, as eight people listed it at number one. Enhanced Marketing had seven, tying with Building Improvements.



When examining the Rating Average, Cultural Opportunities, Expanded Business Hours, Improved Signage, and Enhanced Marketing all scored more highly than Building Improvements. The Rating Average takes the average ranking of all responses to provide a figure between 1 and 5. The higher the rating is, the more important it is for business owners and managers. Since Improved Signage had the second highest number of responses and the third highest Rating, it is the biggest concern overall and should be addressed first. The Village should then seek to Enhance Marketing, encourage Building Improvements, and increase Cultural Opportunities, and Expand Business Hours, in that order.

Please rank the five most important improvements required to encourage shopping, visiting, and doing business in the Village, from 1 to 5, 1 being the most important.

Answer Options	1	2	3	4	5	Rating Average	Response Count
Building Improvements	7	5	5	5	6	3.07	28
Improved Signage	8	4	4	3	4	3.39	23
Greater diversity of shops	5	2	6	5	5	2.87	23
Enhanced marketing	7	4	2	7	2	3.32	22
Better Parking	6	3	1	2	6	3.06	18
Special events	2	2	8	2	3	2.88	17
Façade Improvements	0	4	5	1	4	2.64	14
Landscaping	0	3	3	3	2	2.64	11
Expanded Business hours	1	5	2	1	1	3.40	10
Cultural opportunities	1	5	1	1	1	3.44	9
Sidewalk Improvements	0	2	0	3	1	2.50	6
Expanded Utilities	1	0	1	3	1	2.50	6

Question Nineteen

In terms of enhancing the viability and success of the economy in the Village of Horseheads, the overwhelming majority of respondents felt tax incentives need to be offered. Besides the 72.1 percent that felt this way, the options of Community Events and Improve Local and Regional Marketing tied with 48.8 percent support apiece. All of this points to lowering taxes, encouraging a sense of place, and alerting outsiders to the attributes of the Village.

What, if anything, needs to be done to enhance the viability and success of the economy in the Village of Horseheads? Select all that apply.	
Answer Options	Response Percent
Tax Incentives	72.1%
Community Events	48.8%
Improve Local and Regional Marketing Effort	48.8%
Business Attraction Programs	30.2%
Develop and expand a Business Association	30.2%
Inventory Vacant and Underutilized Properties	23.3%
Architectural Design Guidelines (i.e., façade and sign requirements)	18.6%
Create a Citizen Volunteer Committee for Economic Development	16.3%
Acquire Properties in Tax Default	11.6%
Create a full time Village Economic Development position	11.6%
Other (please specify)	7.0%

Question Twenty

Of the 27 responses regarding Village amenities beneficial to businesses, 15 praised the high-quality roads, high traffic count, and excellent snow removal services. They felt minimal seasonal impact from snowfall. A few mentioned the high level of police and fire coverage as a positive. One business feels that the new Super Wal-Mart will be a boon because it will draw more people to the area. Another suggested drawing the Finger Lakes Wine Trail and the Gateway to Wine County as a way to attract tourists into the Village.

Question Twenty-One

In terms of services adversely affecting businesses, few complaints were given. In fact, many owners and managers defended Interstate 86, stating that it did not affect business. Some, however, disagree with that and specifically mentioned its construction as a cause for lost business. Another mentions that the signs for Ithaca and Horseheads are confusing, causing people to head towards Ithaca rather than go down Grand Central, or vice versa. Traffic along South Main was cited for causing difficulty exiting adjacent parking lots. Fairport Lane was also mentioned as hurting business because it is one way.

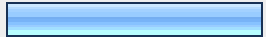


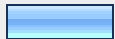



Question Twenty-Three



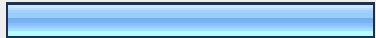


General comments from business owners and managers varied greatly. Some reiterated points they made elsewhere, some praised the Village and its services, some criticized those same

services, and some had issues specific to their business. It would be useful to get business owners together to discuss these and other ideas and concerns they might have. Due to the diversity of opinion, the compiled list has been included:

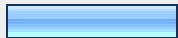
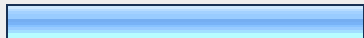



- Extremely happy with Horseheads.
- Village Manager needs to bring in new business and not just rely on the County.
- Encourage Wine Country Tourism.
- Open Pritchard Hall to public use.
- Improve Chemung Street and access to the manufacturing sections of Horseheads.
- Develop festivals, including Winter, Arts and Crafts, and Cultural.
- Create a Horseheads Trolley.
- Happy with current code enforcement program.
- Unhappy with current code enforcement program.
- Attract more diversified retailers.
- High taxes, gas prices, EBay, box stores, and poor paying jobs are hurting business.
- Get rid of brick crosswalks because they are rough and fall apart more and more every year.
- Create a Village Brochure highlighting businesses and important places.

Village of Horseheads Community Planning Survey



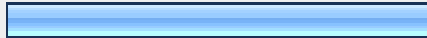

1. A. In your household, how many are in the age range 0-20?			
		Response Percent	Response Count
N/A		27.5%	58
One		27.0%	57
Two		28.9%	61
Three		11.9%	25
Four		3.8%	8
Five		0.5%	1
Six		0.5%	1
answered question			211
skipped question			420

2. B. In your household, how many are in the age range 21-40?			
		Response Percent	Response Count
N/A		26.9%	54
One		31.3%	63
Two		39.3%	79
Three		1.5%	3
Four		1.0%	2
Five		0.0%	0
Six		0.0%	0
answered question			201
skipped question			430

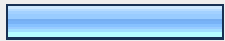


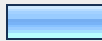

3. C. In your household, how many are in the age range 41-60?

		Response Percent	Response Count
N/A		18.9%	59
One		38.5%	120
Two		41.0%	128
Three		1.0%	3
Four		0.6%	2
Five		0.0%	0
Six		0.0%	0
		answered question	312
		skipped question	319

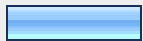
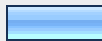
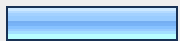
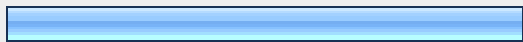
4. D. In your household, how many are in the age range of 61+ ?

		Response Percent	Response Count
N/A		17.8%	71
One		35.5%	142
Two		45.8%	183
Three		1.0%	4
Four		0.0%	0
Five		0.0%	0
Six		0.0%	0
		answered question	400
		skipped question	231

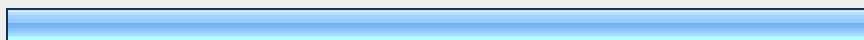

5. E. How many individuals live in your household? (PAPER SURVEY: Add up the lines above)

		Response Percent	Response Count
One		23.5%	142
Two		45.3%	274
Three		14.6%	88
Four		10.6%	64
Five or more		6.1%	37
		answered question	605
		skipped question	26

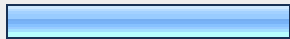


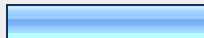
6. 1. How long have you lived in the Village of Horseheads?

		Response Percent	Response Count
0-5 years		14.9%	93
6-10 years		10.7%	67
11-20 years		18.7%	117
21+ years		55.7%	348
		answered question	625
		skipped question	6

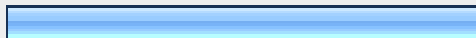
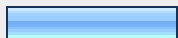
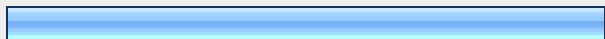
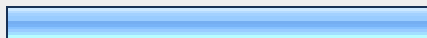
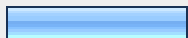
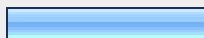
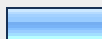
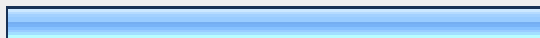
7. 2. Do you own or rent your residence in the Village?

		Response Percent	Response Count
Own		92.2%	569
Rent		7.8%	48
		answered question	617
		skipped question	14

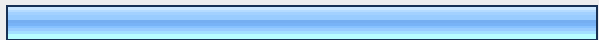
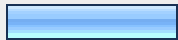
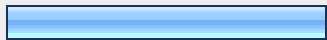
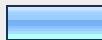
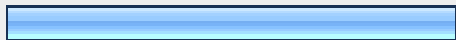
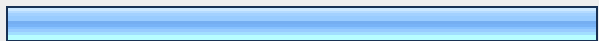
8. 3. For the purposes of this survey, please identify the general area in which you live in the Village of Horseheads.

		Response Percent	Response Count
Village Center		30.6%	187
Windsor Gardens Area		36.8%	225
South of Rt.17/86		10.8%	66
North of Hanover Square		21.9%	134
		answered question	612
		skipped question	19


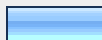
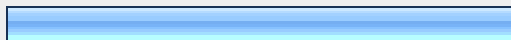
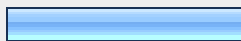
9. 4. In your opinion, what are the positive aspects of living in the Village of Horseheads? Mark only three or none of your answers will be counted.

		Response Percent	Response Count
Village lifestyle		50.9%	315
Scenic Beauty		18.9%	117
Low crime rate		64.6%	400
School District		45.7%	283
Close Knit Community		19.9%	123
Community services		21.8%	135
Recreational facilities		10.3%	64
Close to work and shopping		58.0%	359
		answered question	619
		skipped question	12


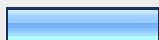
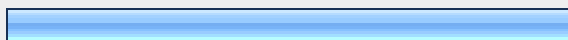
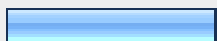
10. 5. In your opinion, what are the least positive aspects of living in the Village of Horseheads? Mark only three or none of your answers will be counted.

		Response Percent	Response Count
Lack of local jobs		63.0%	365
Not enough shopping		18.8%	109
Not enough recreation		34.5%	200
School District		10.7%	62
Nightlife/Activities		48.0%	278
Traffic		63.4%	367
		answered question	579
		skipped question	52

11. 6a. How do you rate Village government and its communication with its residents?

		Response Percent	Response Count
Do Not Know or N/A		9.1%	55
Excellent		10.9%	66
Satisfactory		54.7%	332
Unsatisfactory		25.4%	154
		answered question	607
		skipped question	24

12. 6b. How do you rate Road Maintenance?

		Response Percent	Response Count
Do Not Know or N/A		0.5%	3
Excellent		16.4%	102
Satisfactory		60.8%	378
Unsatisfactory		22.4%	139
		answered question	622
		skipped question	9

13. 6c. How do you rate Sidewalk Maintenance?

		Response Percent	Response Count
Do Not Know or N/A		12.6%	78
Excellent		5.2%	32
Satisfactory		47.5%	293
Unsatisfactory		34.7%	214
		answered question	617
		skipped question	14

14. 6d. How do you rate Police Services?

		Response Percent	Response Count
Do Not Know or N/A		2.4%	15
Excellent		55.5%	346
Satisfactory		37.9%	236
Unsatisfactory		4.2%	26
		answered question	623
		skipped question	8

15. 6e. How do you rate Fire/Emergency Services?

		Response Percent	Response Count
Do Not Know or N/A		4.0%	25
Excellent		73.8%	461
Satisfactory		21.4%	134
Unsatisfactory		0.8%	5
		answered question	625
		skipped question	6

16. 6f. How do you rate Code Enforcement?

		Response Percent	Response Count
Do Not Know or N/A		13.3%	81
Excellent		14.3%	87
Satisfactory		48.3%	294
Unsatisfactory		24.1%	147
		answered question	609
		skipped question	22

17. 6g. How do you rate Current Density and Population?

		Response Percent	Response Count
Do Not Know or N/A		10.3%	63
Excellent		15.2%	93
Satisfactory		71.5%	438
Unsatisfactory		3.1%	19
		answered question	613
		skipped question	18

18. 6h. How do you rate Senior Services & Activities?

		Response Percent	Response Count
Do Not Know or N/A		32.3%	198
Excellent		7.5%	46
Satisfactory		43.1%	264
Unsatisfactory		17.1%	105
		answered question	613
		skipped question	18

19. 6i. How do you rate Youth Services & Activities?

		Response Percent	Response Count
Do Not Know or N/A		23.4%	143
Excellent		24.8%	152
Satisfactory		41.2%	252
Unsatisfactory		10.6%	65
		answered question	612
		skipped question	19

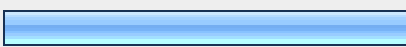

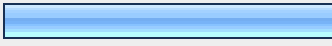
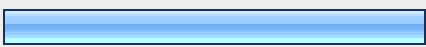
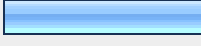
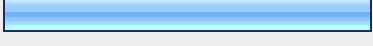
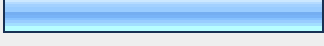
20. 6j. How do you rate Selection of Stores/Shopping

		Response Percent	Response Count
Do Not Know or N/A		1.5%	9
Excellent		26.8%	166
Satisfactory		56.9%	352
Unsatisfactory		14.9%	92
		answered question	619
		skipped question	12


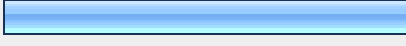
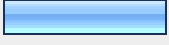

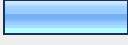
21. 6k. How do you rate Animal Control?

		Response Percent	Response Count
Do Not Know or N/A		11.2%	70
Excellent		22.0%	137
Satisfactory		53.3%	332
Unsatisfactory		13.5%	84
		answered question	623
		skipped question	8

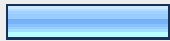



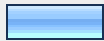
22. 7. Please indicate the three things that would make the biggest improvement to the area where you reside. Mark only three or none of your answers will be counted.

		Response Percent	Response Count
Get property owners to take better care of their houses/property		44.0%	269
Develop sidewalks		34.5%	211
Prevent loss of open space and Village character		36.0%	220
Limit the impact on residential areas from commercial/industrial development		45.4%	278
Allow small, neighborhood retail and service establishments		21.7%	133
Limit traffic and/or slow traffic		39.5%	242
The area where I live is fine		34.8%	213
		answered question	612
		skipped question	19

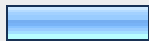
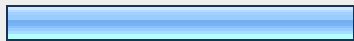
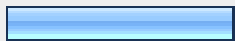

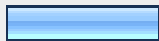
23. 8a. The Village should maintain a residential focus versus adding more businesses.

		Response Percent	Response Count
Strongly Agree		22.6%	136
Agree		43.6%	263
Disagree		17.9%	108
Strongly Disagree		2.8%	17
Undecided		13.1%	79
		answered question	603
		skipped question	28

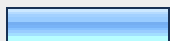
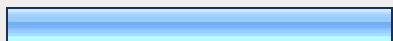
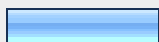

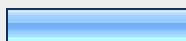
24. 8b. Village needs beautification projects to maintain its quaintness and character.

		Response Percent	Response Count
Strongly Agree		17.5%	107
Agree		52.3%	319
Disagree		17.9%	109
Strongly Disagree		2.3%	14
Undecided		10.0%	61
		answered question	610
		skipped question	21

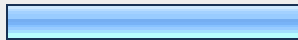
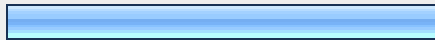


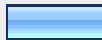
25. 8c. Hanover Square would benefit from a new paint scheme and nicer signs.

		Response Percent	Response Count
Strongly Agree		15.3%	92
Agree		37.7%	227
Disagree		24.2%	146
Strongly Disagree		6.8%	41
Undecided		16.1%	97
		answered question	603
		skipped question	28

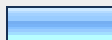
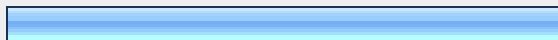
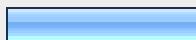


26. 8d. Business in Hanover Square would benefit from upscale apartments on the upper floors

		Response Percent	Response Count
Strongly Agree		17.3%	105
Agree		41.9%	254
Disagree		17.0%	103
Strongly Disagree		4.1%	25
Undecided		19.8%	120
		answered question	607
		skipped question	24


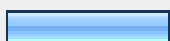
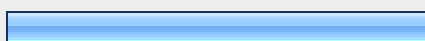
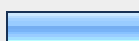
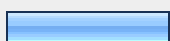
27. 8e. Construct new sidewalks and trails to improve residents' ability to walk comfortably and safely to nearby destinations (i.e. parks, schools, stores). (PAPER SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		31.3%	167
Agree		46.3%	247
Disagree		9.7%	52
Strongly Disagree		2.4%	13
Undecided		10.3%	55
		answered question	534
		skipped question	97


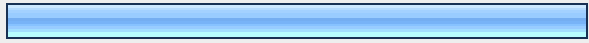
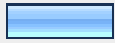

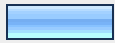
28. 8f. Village has sufficient local businesses to meet my need

		Response Percent	Response Count
Strongly Agree		11.3%	69
Agree		59.7%	364
Disagree		20.8%	127
Strongly Disagree		4.1%	25
Undecided		4.1%	25
		answered question	610
		skipped question	21


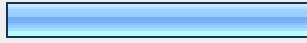


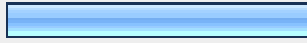
29. 8g. Spend public money to acquire more parkland. (PAPER SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		5.7%	30
Agree		17.2%	91
Disagree		45.5%	240
Strongly Disagree		14.4%	76
Undecided		17.2%	91
		answered question	528
		skipped question	103

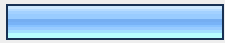
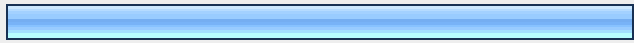



30. 8h. A range of affordable home ownership is available in the Village

		Response Percent	Response Count
Strongly Agree		8.1%	49
Agree		62.4%	377
Disagree		11.9%	72
Strongly Disagree		6.0%	36
Undecided		11.6%	70
		answered question	604
		skipped question	27

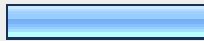



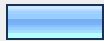
31. 8i. Village provides affordable and adequate senior housing

		Response Percent	Response Count
Strongly Agree		5.0%	30
Agree		32.2%	195
Disagree		20.3%	123
Strongly Disagree		9.9%	60
Undecided		32.6%	197
		answered question	605
		skipped question	26

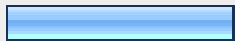
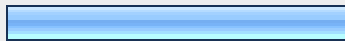
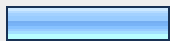

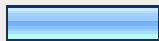
32. 8j. Village is a community where residents feel safe in their homes and on the streets.

		Response Percent	Response Count
Strongly Agree		23.5%	144
Agree		67.5%	413
Disagree		6.2%	38
Strongly Disagree		0.5%	3
Undecided		2.3%	14
		answered question	612
		skipped question	19

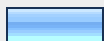
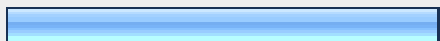
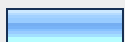

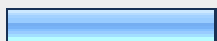
33. 8k. Rt. 14/Westinghouse Rd. should be maintained as a professional/residential roadway.

		Response Percent	Response Count
Strongly Agree		22.0%	134
Agree		59.7%	364
Disagree		5.6%	34
Strongly Disagree		2.3%	14
Undecided		10.5%	64
		answered question	610
		skipped question	21

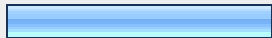




34. 8l. Village needs a community center.

		Response Percent	Response Count
Strongly Agree		24.4%	148
Agree		36.1%	219
Disagree		17.1%	104
Strongly Disagree		6.1%	37
Undecided		16.3%	99
		answered question	607
		skipped question	24

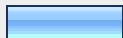
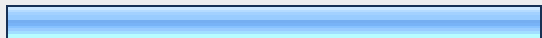
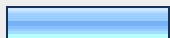

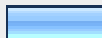
35. 8m. Village currently promotes itself as a unified community with the new traffic pattern of I-86.

		Response Percent	Response Count
Strongly Agree		10.9%	65
Agree		46.8%	278
Disagree		13.0%	77
Strongly Disagree		6.9%	41
Undecided		22.4%	133
		answered question	594
		skipped question	37

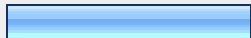
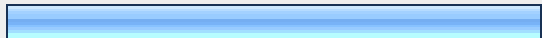



36. 8n. Volunteer Emergency service protection (Fire/first responder) meets the needs of the community. (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		28.6%	24
Agree		59.5%	50
Disagree		2.4%	2
Strongly Disagree		1.2%	1
Undecided		8.3%	7
		answered question	84
		skipped question	547

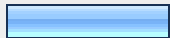



37. 8o. Village provides adequate, appropriate activities for youth (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		12.5%	10
Agree		57.5%	46
Disagree		17.5%	14
Strongly Disagree		2.5%	2
Undecided		10.0%	8
		answered question	80
		skipped question	551






38. 8p. Village has a responsive police presence. (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		26.3%	21
Agree		57.5%	46
Disagree		7.5%	6
Strongly Disagree		6.3%	5
Undecided		2.5%	2
		answered question	80
		skipped question	551


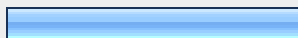
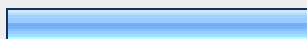
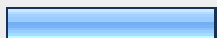
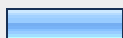
39. 8q. Village roads are maintained in good shape. (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		17.5%	14
Agree		55.0%	44
Disagree		21.3%	17
Strongly Disagree		6.3%	5
Undecided		0.0%	0
		answered question	80
		skipped question	551

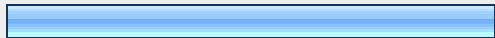






40. 8r. Code enforcement is adequate to maintain desirable neighborhoods. (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		5.0%	4
Agree		56.3%	45
Disagree		27.5%	22
Strongly Disagree		7.5%	6
Undecided		3.8%	3
		answered question	80
		skipped question	551



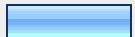


41. 8s. Village government communicates with its residents. (WEB SURVEY ONLY)

		Response Percent	Response Count
Strongly Agree		1.3%	1
Agree		31.3%	25
Disagree		32.5%	26
Strongly Disagree		22.5%	18
Undecided		12.5%	10
		answered question	80
		skipped question	551

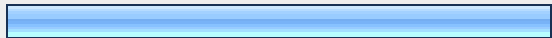







42. 9. In general, what type of development do you feel the Village should encourage? Mark all that apply

		Response Percent	Response Count
Residential		52.1%	305
Small scale, neighborhood commercial		36.5%	214
Large scale commercial		6.8%	40
Office/light industrial		22.0%	129
Mixed use development with residential, office and small scale commercial		42.2%	247
Large industrial		10.9%	64
No new development		20.8%	122
		answered question	586
		skipped question	45


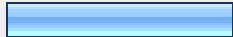


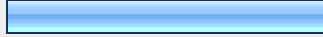
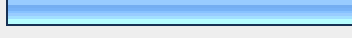
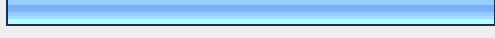
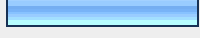
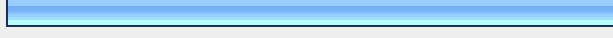
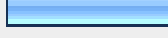
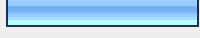
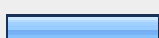
43. 10. How often do you shop or seek services in the Village?

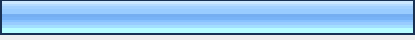
		Response Percent	Response Count
Several times per week		47.0%	285
Once a week		36.1%	219
Once a month		13.3%	81
Once a year		1.8%	11
Never		1.8%	11
		answered question	607
		skipped question	24

44. 11. What types of businesses would draw you to the Village? Please mark any that apply

		Response Percent	Response Count
Restaurants		58.7%	310
Drug Store		24.6%	130
Specialty Retail		40.2%	212
Grocery		39.4%	208
Medical		23.3%	123
Convenient Store		15.7%	83
Clothing/Shoe Store		31.1%	164
Movies/Entertainment		50.0%	264
		answered question	528
		skipped question	103

45. 12. If no changes are made, what will be the most important problems facing the Village over the next 10 years? Please mark only five or none of your answers will be counted

		Response Percent	Response Count
Availability of affordable housing options		39.8%	233
Availability of a variety of housing options		24.9%	146
Loss of open land/undeveloped land		26.5%	155
Adequacy of parks and recreation facilities		24.7%	145
Adequacy of infrastructure(water and sewer)		34.6%	203
Maintaining highest quality schools		37.7%	221
Crime and public safety		52.4%	307
Damage to natural resources		20.7%	121
Level of traffic and congestion		65.7%	385
Rate of residential growth		17.2%	101
Rate of commercial growth		21.0%	123
Appearance of commercial		16.0%	94

development			
Availability of places to walk and bike safely		44.5%	261
	answered question		586
	skipped question		45

46. Please feel free to include anything else you would like us to know in regards to planning in the Village of Horseheads.		
		Response Count
		234
	answered question	
	skipped question	
		234
		397

47. If you wish, provide comments or an explanation to any of your answers above. (WEB SURVEY ONLY)		
		Response Count
		25
	answered question	
	skipped question	
		25
		606

MEMORANDUM

TO: Dave Radin and Mike Stenpeck, Co-Chairs, Horseheads Community Planning Advisory Committee

FROM: Jeremy R. Zaborowski, Economic & Community Development Specialist - Laberge Group

DATE: 11/05/2007

RE: **Village of Horseheads, New York, Assets and Liabilities Workshop #1 – Summary**

This is a summary of the results from the Horseheads Assets and Liabilities Workshop #1, held October 3, 2007. A group of more than 60 citizens attended the session, worked in small and large groups, and provided insights and perspectives on the current and future state of the community. A compilation of all assets and liabilities, along with the number of groups that mentioned them and the number of people who felt them to be the most important issue facing the Village, is included after the summary.

The greatest asset, as observed by Village residents, is the “small town” feel and all the accompanying traits. They find it a safe place for kids and adults; a small community with a hometown feeling and a low crime rate. Fifteen people, or 25% of meeting attendees, chose this aspect as the greatest asset of Horseheads. Tied into this perception were the second and third greatest assets: good police and fire departments and good schools and facilities. Eight of the ten tables mentioned the high quality of fire and police services as an asset, and 11 people marked it as the greatest asset. Good schools and facilities were expressed by seven tables and was considered most important by 9 of the people. The remaining 25 people split their various votes between 15 other assets of the community, including affordable and convenient services, central location and close proximity to services, and a strong sense of community and friendliness.

The liability expressed and emphasized the most was the lack of a community center. Nine tables and nine separate people marked this as the number one liability of Horseheads. Many others emphasized the need for Code enforcement consistency, with five people considering it a priority and three tables bringing it up. While eight separate tables brought up traffic issues related to Hanover square, only three people marked it as the greatest Village liability. Likewise, trash pick-up, street cleaning, and spring cleanup were mentioned by six tables but only prioritized by two people. Lack of sidewalk maintenance was also mentioned by five tables and chosen as the biggest problem by two people. While many tables did not cite communication and the LRC buildings as a problem (three and four tables, respectively), each issue did receive four votes for being the greatest Village liability. The other 36 votes were spread among 24 other potential liabilities of the Village, including abandoned buildings, lack of jobs, a split Village due to I-86, and general traffic issues.

Village of Horseheads

Assets and Liability Workshop

Category	Assets	No. of groups mentioning it	Stickers*
Transportation	I-86, north side and Linear park look more appealing than expected	2	-
	Grand Central median plantings are wonderful	2	-
	New and safe walking areas	2	
	Logistical location – highways are easily accessed to other areas	1	1
	Easy access by way of highway	1	-
	Rte. 64 improvements gives good access to area shopping	1	-
	Transportation alternatives are handy	1	-
	Highways – better for traffic	1	
Passive and Active Recreation	Parks and park entertainment, recreation areas, Teal Park, Farmers Market, Sullivan Park	8	-
	Youth activities, sport organizations, sports teams and the Youth Bureau	7	2
	Rich history	6	1
	Village festivals, holiday events, Jubilee, community gatherings	5	1
	First class library	4	-
	Great place to raise kids- lots of activities, pool, low-cost or no-cost recreational activities	3	-
	Variety of civic and religious organizations	1	-
	Village website	1	-
	Youth court	1	-
	Zimmerman House	1	-
	Arts and entertainment	1	-
Housing and Structures	Affordable housing	2	-
	Retirement facilities, Bethany Retirement	2	-
	Housing stock	1	-
	Senior housing availability	1	-
	Well maintained homes	1	-
	Very strong home ownership	1	2

Services and Infrastructure	Police and Fire departments	8	11
	Village administrative staff, government services, Village employees	4	-
	Affordable and convenient services, community services, diversity and availability	4	5
	Really good snow removal, and street maintenance, public works system	4	-
	Low taxes	2	-
	Animal shelter, animal control shared service	2	-
	Health care	2	1
	Top notch emergency services	1	1
	Reasonable taxes and water cost	1	-
	Planning board listens and looks towards the future	1	-
	Parks and Recreation	1	-
	Water and environment	1	1
	Garbage pick-up	1	-
	Easy access to banks	1	-
	Senior Citizens Center at Broad Street School	1	-
Economic Development	Restaurants, Younger people are drawn by restaurants to Hanover Square	5	1
	Hanover Square improvements and potential	4	1
	Available brownfields for industrial development	1	-
	Holding Point has industrial potential	1	-
	Westinghouse has potential for growth	1	-
	Real estate potential		
Community Image	Safe for kids and adults, low crime rate, small community, hometown feeling, safe neighborhoods and neighbors, sense of community, close-knit community	10	15
	Participating citizens, people help people, Village friendliness, people know each other, community reputation, volunteerism	10	5
	Central location, geography and proximity, everything you want is close by, quality of life	7	6
	Close to shopping	7	2
	Good schools and facilities	7	9

	Good variety of places of worship, well maintained cemeteries	6	
	Clean environment, scenery, aesthetics, historic architecture	4	-
	Beautification areas and opportunities, appearance of the community	2	-
	Grand Central Ave and Main St. homes are lovely, quality architecture in the Square	2	-
	Stability of population	2	
	Gateway to the Finger Lakes	1	1
	Close to medical facilities	1	-
	Close to higher education	1	-
	Close State and County parks	1	-
	Rural atmosphere	1	1
	Neighborhood watch	1	-
	Insurance rate/safety	1	
	Weather	1	-

*Stickers denote the number of votes each topic received for being the most important asset or priority for the Village to focus upon.

Village of Horseheads

Assets and Liability Workshop

Category	Liabilities	No. of groups mentioning it	Stickers*
Transportation	Traffic	4	2
	Lack or poor maintenance of Sidewalks	5	2
	Can't cross I 86 by foot	1	-
	Lack of curbing	1	-
	Need of affordable public transportation	1	-
	Speeding	2	2
	Traffic lights timing	2	-
	Hanover Square traffic pattern, crosswalks and parking. Merchants should park elsewhere.	8	3
	South Main Street traffic	1	-
	Intersection of Broad and Thorne Street	1	1
	Westinghouse Road traffic	1	-
	Absence of access from Rte.13	1	-
	Traffic lights on Grand and Sayre Streets	2	-
	Develop access to Rte. 13 from Holding Point	1	-
	Extend median to south on Grand Central	1	
Passive and Active Recreation	Lack of open space, green space	3	1
	No cultural entertaining	1	
	No community center	9	9
	Need more activities and community events	3	-
	Catharine Trail extension not completed	1	-
	Linear Park not maintained	1	
	Need larger library	2	2
	Historic restoration	3	1
	Lack of sunsets	1	-
	Cold winters	1	-
Housing and Structures	Housing in ill repair	3	-
	Rental residential properties can be undesirable	1	-
	Non-diverse community	1	-
	Lack of affordable housing for elderly	1	-
	Absentee landowners	1	-
	Abandoned or poorly maintained properties on North Main Street	1	1
	Abandoned buildings on South Ave.	1	1
Services and Infrastructure	Animal control, cats, mosquitoes	1	2

	Trash pick-up, street cleaning, spring clean-up	6	2
	Code enforcement consistency	3	5
	Need more policemen	2	-
	No community newsletter	3	1
	Zoning enforcement, changes, too complex zoning ordinance	4	2
	Not enough Village services	1	-
	Need to consolidate services	1	-
	Poor communication by Village officials, embedded mind set, inapproachable, favor few over majority	3	4
	Fear of using financial resources	1	-
	Duplication of services	1	-
	Improve water infrastructure	1	
	Post Office moving	1	1
	No crematorium in the Village	1	1
Economic Development	Control commercial growth	1	-
	Lack of stability in Hanover Square businesses	1	-
	Lack of jobs, or better paying jobs	4	2
	LRC building	2	4
	Increasing number of residents on public assistance	1	-
	Loosing young people to other places, no influx of other people	2	1
	Lack of businesses and industrial development at the Holding Point	1	1
	Shortage of developable land	2	-
	Not “trapping the tourists”, bad tourism marketing, highway traveler moving through	3	1
	Develop Hanover Square for retail and niche shops	3	-
	Poor entrance to Village	1	-
	Encourage small businesses to refurbish and use old buildings	1	-
	Lack of manufacturing	1	-
	High cost of doing business	1	-
	No selling point to come into village	1	-
	Preserve natural resources	1	
	Hanover Square loosing focus – historic district	2	3
	Holding Point	1	-
	Aesthetics of store fronts	1	-

Community Image	Split Village due to highway	5	1
	Eyesores: abandoned commercial properties	1	-
	Pockets of poverty within the Village	1	
	Spot zoning problems	1	
	Older population	1	
	Young adults are not active in community affairs	1	
	Overdevelopment, urban sprawl, too close to Elmira	2	2
	Lack of concern for south side of Village	1	-
	Filthy business back lots	1	1
	Rundown, blighted properties	2	3
	Lack of neighborhood watch in some neighborhoods	1	-
	Plant more street trees	1	-
	Littering	1	-
	Community suited for older median age	1	1

*Stickers denote the number of votes each topic received for being the most important asset or priority for the Village to focus upon.

MEMORANDUM

TO: Dave Radin and Mike Stenpeck, Co-Chairs, Horseheads Community Planning Advisory Committee

FROM: Jeremy R. Zaborowski, Economic & Community Development Specialist - Laberge Group

DATE: 11/5/2007

RE: **Village of Horseheads, New York, Visioning Workshop #2 – Summary**

This is a summary of the results from the Horseheads Visioning Workshop #2, held October 22, 2007. A group of more than 60 citizens participated in the session aimed at defining and coming up with solutions to the main issues for the Village. The full set of comments from the meeting is included with this document in the following format:

Topic

- Issue/ Concern
 - Recommendations/ Solutions

While a large number of concerns came from the Visioning Workshop, the majority of them were specific issues falling under broader categories. For instance, many specific issues were raised that all related to development of the Holding Point. Likewise, Hanover Square was identified as an asset, but one that requires significant and broad changes, such as solutions to traffic and parking, attraction of businesses that stay open later and attract younger people, and improvement to overall aesthetics.

Multiple people expressed interest in extending existing trails and walkways to connect with each other. While many people love this resource, they saw connecting them as a way to improve their contribution to the community. Thorne Street Park was also seen as a wealth of opportunities, ranging from winter activities like an ice rink to repairing the current sidewalks. Many people were also concerned with preserving the historical character of the Village, including major homes as well as municipal architecture.

Sidewalks were often cited as a major issue. Most people wanted replacement or new sidewalk creation, while some did see the lack of sidewalk in their front yard as an asset (i.e., reducing the shoveling responsibility and the liability of someone getting injured while walking across it). Redeveloping the Leprino area was also seen as important.

In terms of housing, two major concerns came out of the meeting: 1) lack of code enforcement and 2) lack of affordable housing stock. Many people expressed concern over the appearance of neighboring houses and yards and wanted better code enforcement to address this issue. Many people also recognized a need in the community for affordable to moderately priced housing opportunities. The lack of these entry-level living spaces was seen as a significant drawback to attracting younger professionals and families.

VISIONING WORKSHOP #2 PUBLIC COMMENTS

Economic Development

- Holding Point – Privately owned.
 - Problem: Not filled up – Private ownership. Excellent infrastructure – water, sewer.
 - Need to work with STEG.
 - 1st appearance is unappealing.
 - Need access to major highway, i.e. RT 13, I-86.
 - Attempt to get owners involved in the community/planning process.
 - Work with STEG and county government to create a RT 13 – Holding Point connector sign.
- Hanover Square
 - Traffic is hectic and parking is inadequate. Enough business is there.
 - Left turns are difficult on any street in Hanover Square.
 - Traffic flow still a problem.
 - More boutique type stores in Hanover.
 - A Dance club or something else social for younger people.
 - Acquire property for a parking garage (some said no).
 - Stop sign at John St.
 - Police need to write tickets, enforce cross walks.
 - Manufacturing facilities/tax incentives.
 - Small grocery store.
 - More parking – promote what is there.
 - If you bring apartments and more business, it might make it worse.
 - Slow down speed limits.
 - Stop sign at John Street or change speed limits.
- Small Business
 - Apartments above Hanover Square buildings.
 - Upscale apartments.
 - Communication issues with small business.
- Economic Development is a way to lighten burden on residential taxpayers.
 - Village should have an Economic Development Committee.

Recreational, Cultural and Historical Resources

- Dog park
 - Open land in Holding Point.
 - Better things to do with tax money e.g. sidewalks – a dog park is not necessary.
 - Possible site: down by I-86 or South Main by retention pond.
- Community Center
 - LCR Building.
 - Current library – use for community center.
- Thorne Street park
 - Extend walking path, connect to Linear Park,
 - Clean up swamp.
 - Sidewalk through cemetery to Thorne Street is bad. Walking trail is a huge plus.
 - There is no recreation in winter months.
 - Get an ice rink at Thorne Street.

- South Main
 - Put services underground
 - Extend Square further out.
- Walking Path
 - Connect to Catharine Walking Trail.
- Hanover Square
 - Uniformity colors
 - Underground utilities.
- History/Historical
 - Information Center.
 - Work to identify historic buildings.
 - Walking trail, Library -can a second floor be added.
 - Protect and identify historical homes. Get help for HHCS volunteers.
 - Where is the old Canal? Clinton campaign and how HHDS got its name.
 - Promote ZIM House. Masons promote as a gateway to Finger Lakes.
 - Find money.
 - Need architectural review of Hanover Square building.
 - Protect large older family homes from becoming multi-family.
 - Promote the historical society to the community.
 - Library too small – built in 1967 and designed for 25,000 items. It now has 63,000.
 - Library district should float a bond for a new Horseheads Library.
- School acreage is underutilized – community center is a great idea.
 - Locate in available areas such as the school.
- Cultural base – sense of community
 - Start oral history project. Use as a basis for local paper.
- Babe Ruth baseball needs more space.
 - Get Horseheads High School to allow use of the varsity fields.
- Changes to recreational space, facilities, programming.
 - Develop a Community Center.
 - Expand baseball fields if land is available.
- What incentives to property owners, etc.
 - Find out if money, tax breaks, or grants are available.
- Horseheads Linear Park
 - Good lighting, many people walk the brickyard.
- Thorne St. Pool
 - Good attendance, good balance of residents and non-residents at pool.
- Recreation
 - How about a winter fest with snow sculptures, ice games, any kind of food?
 - Expand recreational activities. Restructure use of existing buildings.
 - Need central organization office for youth and seniors.
 - Need personnel to organize youth and senior activities.
- Incentives
 - Develop revolving, low-interest funds for exterior Improvements.

Municipal Resources

- Zoning issues
 - We have enough of everything;
 - Re-develop the Leprino area.
 - Retain charm of Village. Residential character is nice.
 - Examine properties to be sure that they are with the zoning – seems to be many violators.
 - Preserve Village feel/charm.
 - Full time code enforcement.
 - Keep from allowing front yards to turn into “junk yards.”
 - Garner Road near Jubilee. Teal Park area requires better code enforcement.
 - No communication on code enforcement, programs for improvement – need full time.
 - Code enforcer.
- Thought traffic on Broad Street would lessen when I-86 was done, but it appears not be the case.
- Sidewalks
 - Older section of Village Sayre/South Avenue/N. Carroll requires replacement.
 - Expense is problem; some Village improvements need more.
 - Sometimes you have to call them for curb repairs.
 - No area to walk on Upper Garner Road. There is a ditch on one side.
 - Need sidewalks so people do not have to walk in road.
 - Steuben, Crane/Central sidewalks crumbled, roots dangerous – a mixed bag - 50/50 replacement not known by citizens, property owners can be sued.
 - Promote 50/50 program more. Find out what programs other communities have. Are unions required?
 - Encourage trustees to do study on sidewalks, on safety, (Garner Rd. School), 50/50. Find less expensive ways to replace.
- Speed on Main St. near HSBC is an issue. Multiple groups agreed.
 - Reduce speed –police stretched to limit. Separate patrol to monitor.
- Communication from Village is good, but website not used enough.
 - Many people should use website -newsletter from Village Board on a quarterly basis.
- Speed on Upper Garner Rd. is outrageous –near school.
 - More enforcement would be possible if police force increased or install cameras.
- Intersection at Broad/Thorne is a serious hazard.
 - Control w/more stop signs.
- Village needs to maintain volunteer fire force.
 - Need to train and recruit new members for volunteer fire department.
- Speeding on S. Main St./Grand Central.
 - Enforcement.
- Westinghouse Road Traffic
 - Limit businesses along this busy corridor.
- Municipal services
 - Good services overall.
 - Want Dumpster Program back. More police visibility.
 - Neighborhood watch program needed.
 - Enforce speed limits on Village Streets.
- Intersections
 - Intersections with high traffic: West 15 Road and Grand Central.
 - Westinghouse Road.
 - Thorne and Broad St. intersection.

- Roadways
 - Plants are too high in the median of Grand Central.
 - Increase road maintenance.
 - Increase code enforcement activities.
 - Better maintenance of streetlights.
- Village government communication
 - Semi-annual neighborhood/public meetings.
- Village service needed or need improvements.
 - Create Dumpster program.
 - Properly repair storm drains along Grand Central and Fletcher Street.
- Government communication
 - Encourage website.
 - Make more accessible.
- Public hearing indifference
 - Proactive in public awareness. Community needs to represent itself.

Housing

- Housing
 - Help people who wish to improve property.
 - Garbage is in yards and rules seem not enforced.
 - Preserving historic homes should be a priority. Find help & money and registration. Get Cornell architecture students.
 - Get neighbors to clean up their yards- don't have a solution.
 - Preserving historic homes should be priority: help & money and registration. Cornell students, architectural grants.
 - Village to obtain grants and 50/50 programs such as paint/ sidewalks/ fencing programs.
 - Adding more personnel to the code department in the Village.
 - Bring dumpster program back.
 - Still need more single-family mid-range.
 - Zoning changes high-rise apartments in developable areas.
 - North Main Street houses need to be fixed up.
 - Marshall feed mill/get rid of it.
 - Build more affordable homes (100,000-150,000).
- Code Enforcement
 - Not maintaining properties. Too many people in residence beyond code requirements.
 - People unaware of codes or codes not enforced.
 - No accountability, need incentives to enforce codes. Stiffen penalties and more fines. Need to look at whole issue of codes.
 - Sidewalks need to be upgraded. Possibly increase the sidewalk funding.
 - More code officers needed.
 - Revisit code and see if all are still valid. Figure out how to pay for it. Money has to come from somewhere.
 - Could be handled more easily by prioritizing issues and having more communication.
- No side walks or curbs
 - Some are happy about it while others want new or replacements sidewalks and curbs.
- Trees on property
 - Trim trees so they will not hang over the sidewalk.
 - Maintain property so it is safe.

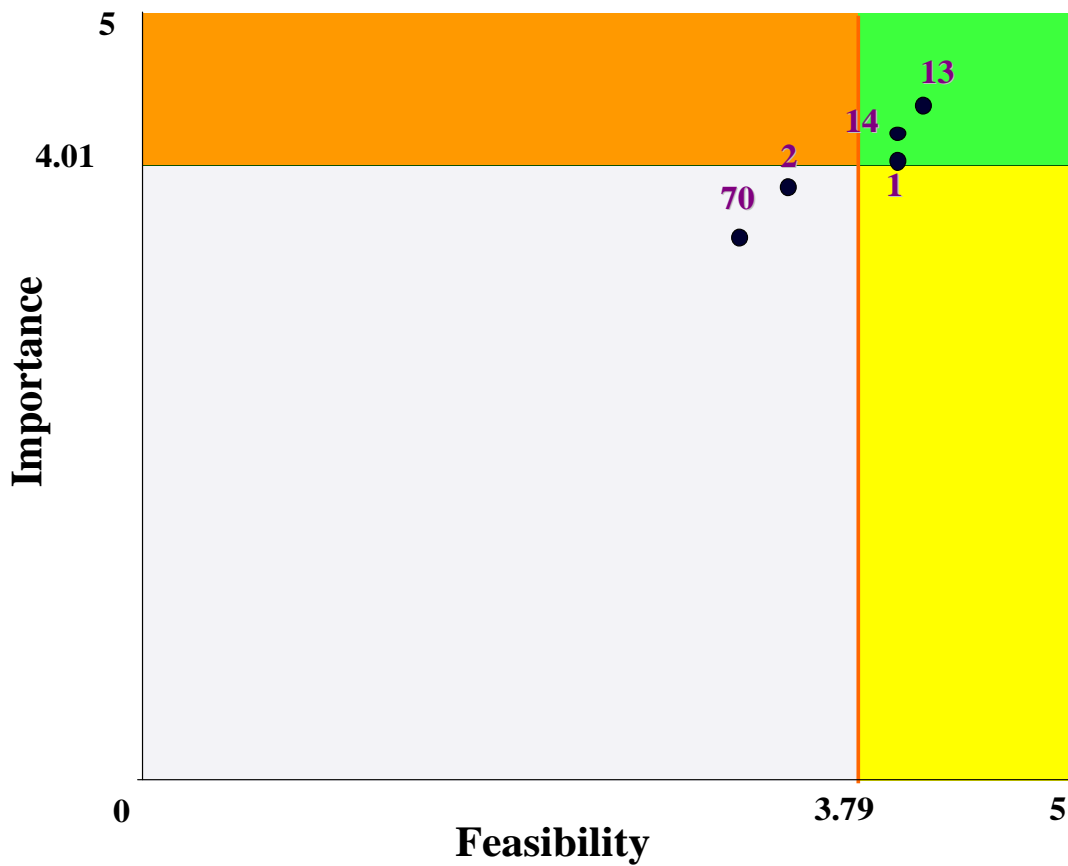
- Mixed bag: well kept next to “dump”. How do we know who are rentals? Several houses on Orchard St. have been in disrepair for years.
 - Neighborhood coalition.
- More rentals without incentives to maintain.
 - Owners of rentals need to be under management.
- Affordability
 - Maybe not enough upscale.
 - Large price range available.
 - Direct link to well paying jobs.
- Bring back dumpster day
 - Figure out how to pay for it.
- Sloppy yards
 - Kids/community service volunteers. High school volunteers.
 - Grants from community improvements.
- Benton Place
 - Residents were opposed to it. How did it happen?
- What housing to encourage.
 - Just clean up what we have.
- Connectivity
 - No issue.
- How to integrate the neighborhoods.
 - Create more local activities for the entire Village community.

Land Use and Resources

- Influx of traffic from I-86 development.
 - Signs (lighted).
 - State issues not Village issues.
- Entering I-86 West, Miracle mile.
 - Alternative back roads from Miracle mile to Plaza crossings.
- Old golf course
 - Make into dog park,
 - extend Catherine Valley trail.
 - Have it used for senior housing-accessible to mall, Guthrie Clinic, Amot Clinic, etc.
- Wetland area does not even have name. It is only called the Swamp.
 - Preserve, picnic area, wildlife walk.
- Garner Road growth (23 acres).
 - Residential development is preferable to commercial development.
 - Communication with business about Block Grants and grant money availability.
- Wal-Mart Super Center.
 - Keep “Big-Box “ stores there (zoning).
- Local Community Resources
 - Community Center.
- Colonial Motel
 - Clean up area.
- Housing for seniors
 - Build “Villa Siereen” in Horseheads.
- Chemung Street-behind the Plaza
 - Zoning may be an issue.

- If the Village needs more land, perhaps annexing the area by Elks would help.
 - This would encourage growth.
- Developers should be required to meet specifications.
 - Require developers to put parks/ open space in whenever a new facility is put up. The park then becomes a Village asset.
- Absentee landlords becoming an issue.
 - Need to develop restrictions to control rundown apartments.
- Code enforcement is a problem in keeping the community aesthetically appealing.
 - Increase code office staff.
- Westinghouse Road could be a problem
 - Want to avoid strip malls.
- Changes to land use trends.
 - Do not change zoning for Lutheran Church on Westinghouse.
 - Clean up areas that need it.
- Do we want progress or green space?
 - Protect remaining green space by not developing, change zoning.
- Natural resources
 - Protect great water supply.
 - Mill St. Pond clean up.
 - Don't need any more places to shop.
 - Don't want empty buildings in 10 years.
- Growth issues
 - Garner Road area -stop development
- Too many absentee landlords. Too many empty apartments
 - Regulate, and stop building any more! We need to benchmark other towns/cities who are trying to tackle absentee landlords.
- Water
 - Must protect Newton Aquifer
- R-2 and R-3 issues
 - Look at spot zoning.
 - Revise zoning to re-impose quaint character of the Village.
 - Hanover Square needs to have new Town storefronts and signs- needs an identity.

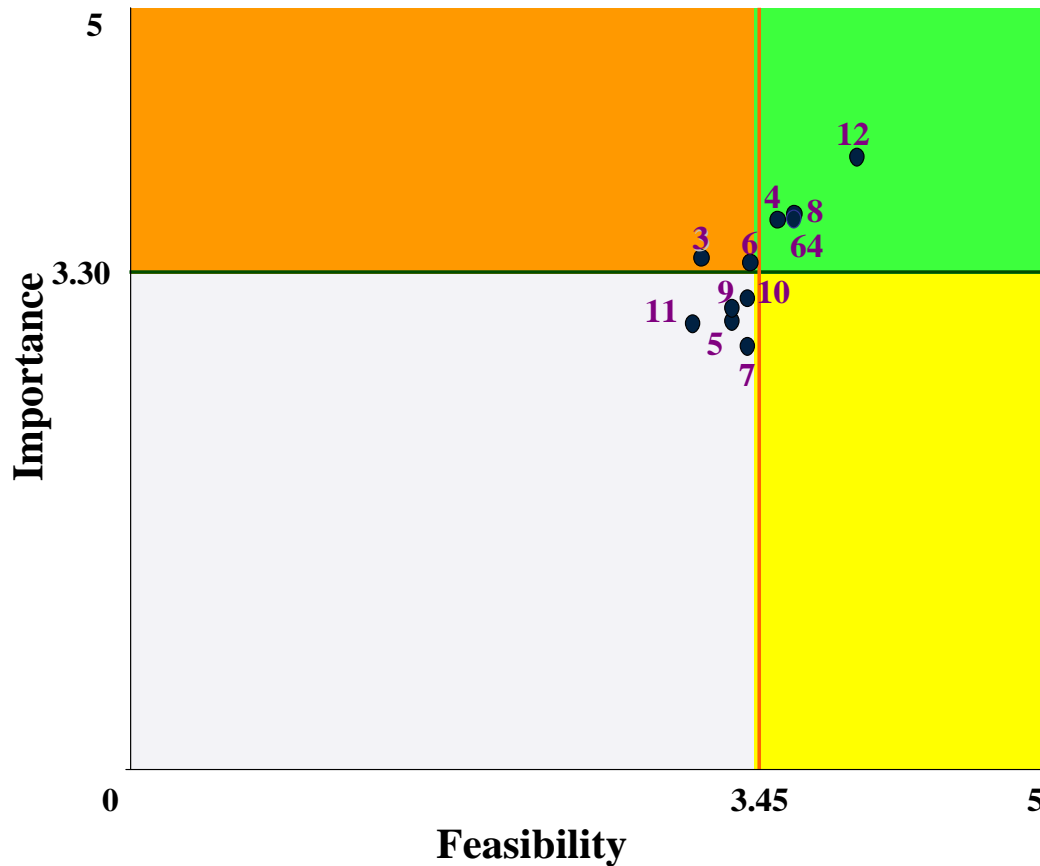
Economic Development



Question	Average Importance	Average Feasibility
1	4.00	4.02
2	3.90	3.40
13	4.38	4.21
14	4.28	4.02
70	3.52	3.29
	4.01	3.79

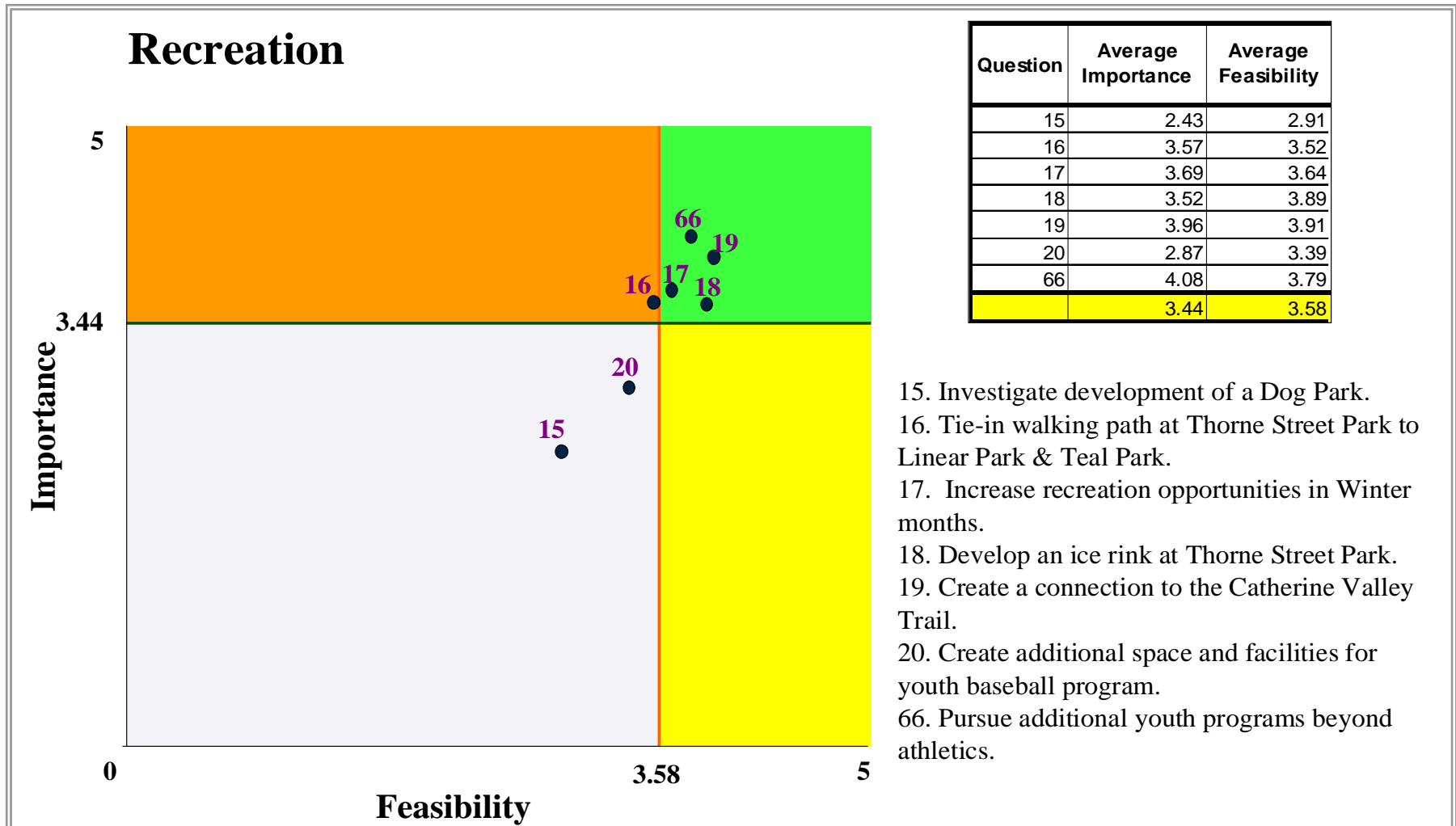
- 1. Work closer with Southern Tier Economic Growth to market the Holding Point Facility.
- 2. Investigate a direct access from major highways to the Holding Point facility.
- 13. Enhance communications between village government and small businesses.
- 14. Enhance/promote a revolving, low-interest loan program for façade improvements and small business start-ups.
- 70. Enhance Rail access to the Holding Point.

Hanover Square

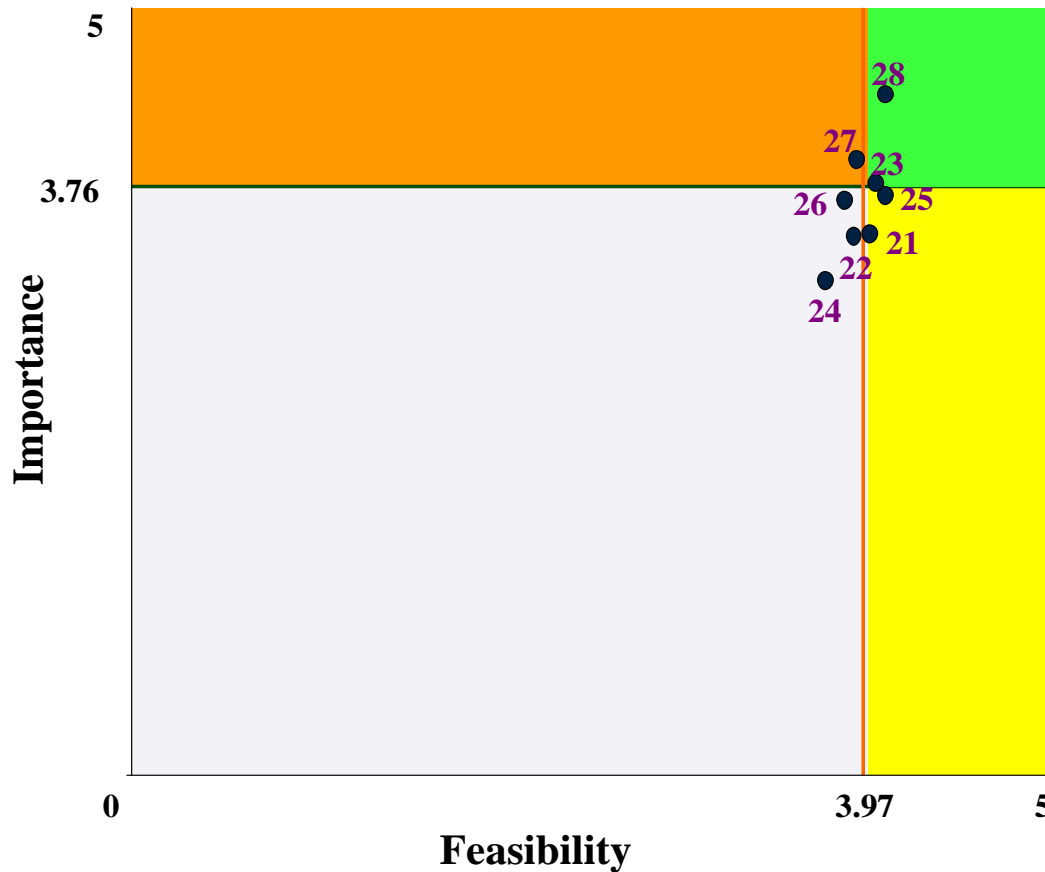


Question	Average Importance	Average Feasibility
3	3.38	3.11
4	3.60	3.53
5	2.96	3.30
6	3.33	3.43
7	2.78	3.41
8	3.64	3.64
9	3.02	3.36
10	3.09	3.43
11	2.90	3.11
12	4.09	3.96
64	3.56	3.63
	3.30	3.45

- 3. Investigate traffic in Hanover Square.
- 4. Attract boutique/niche stores.
- 5. Attract stores/services for younger people.
- 6. Initiate a parking needs study.
- 7. Increase police enforcement at cross walks.
- 8. Assist development of higher-end housing.
- 9. Investigate opportunities for Pritchard Hall.
- 10. Pursue development of wireless system.
- 11. Extend the boundaries of Hanover Square.
- 12. Create architectural design guidelines.
- 64. Provide Resources to continue/ enhance beautification Program.

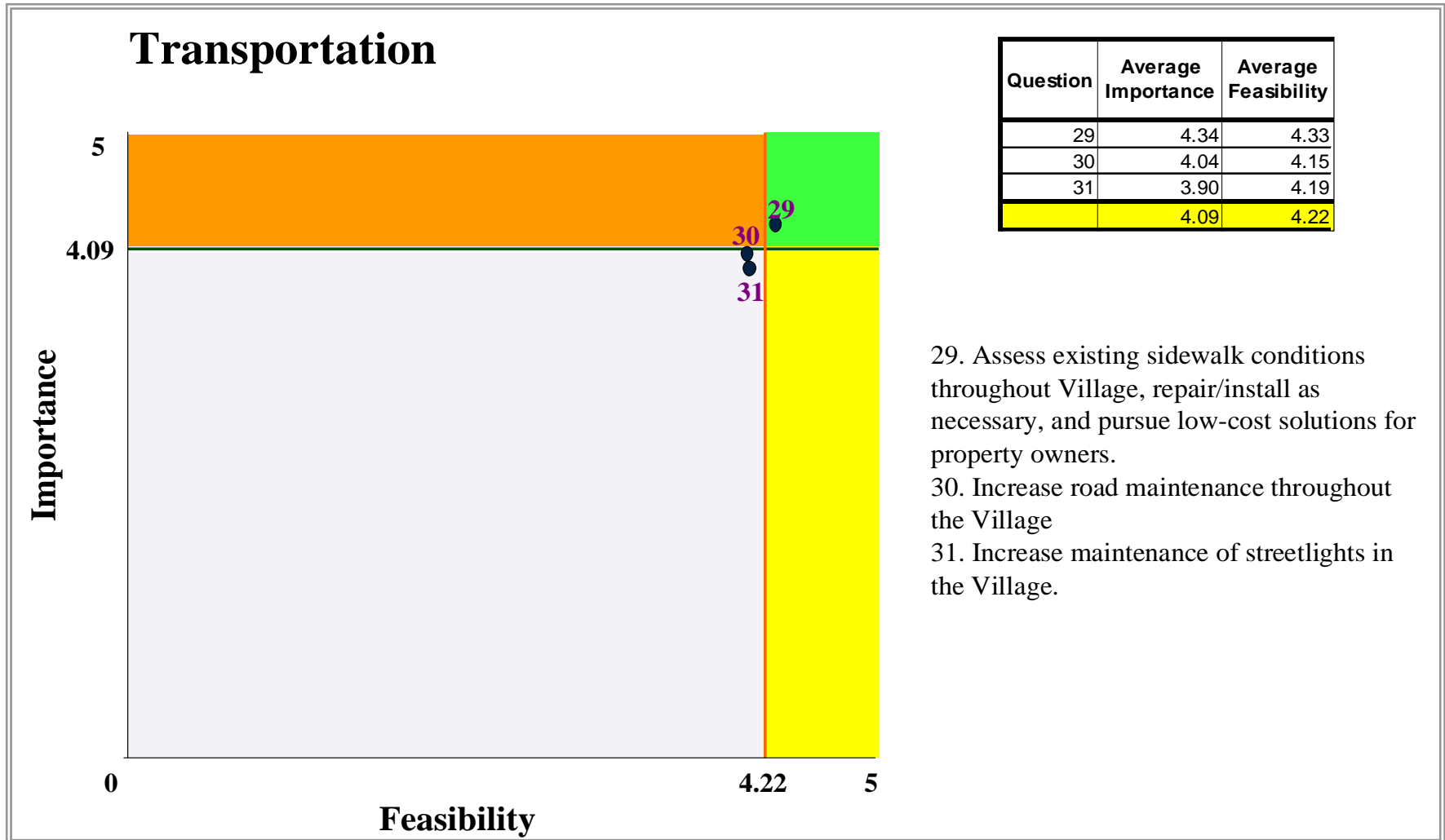


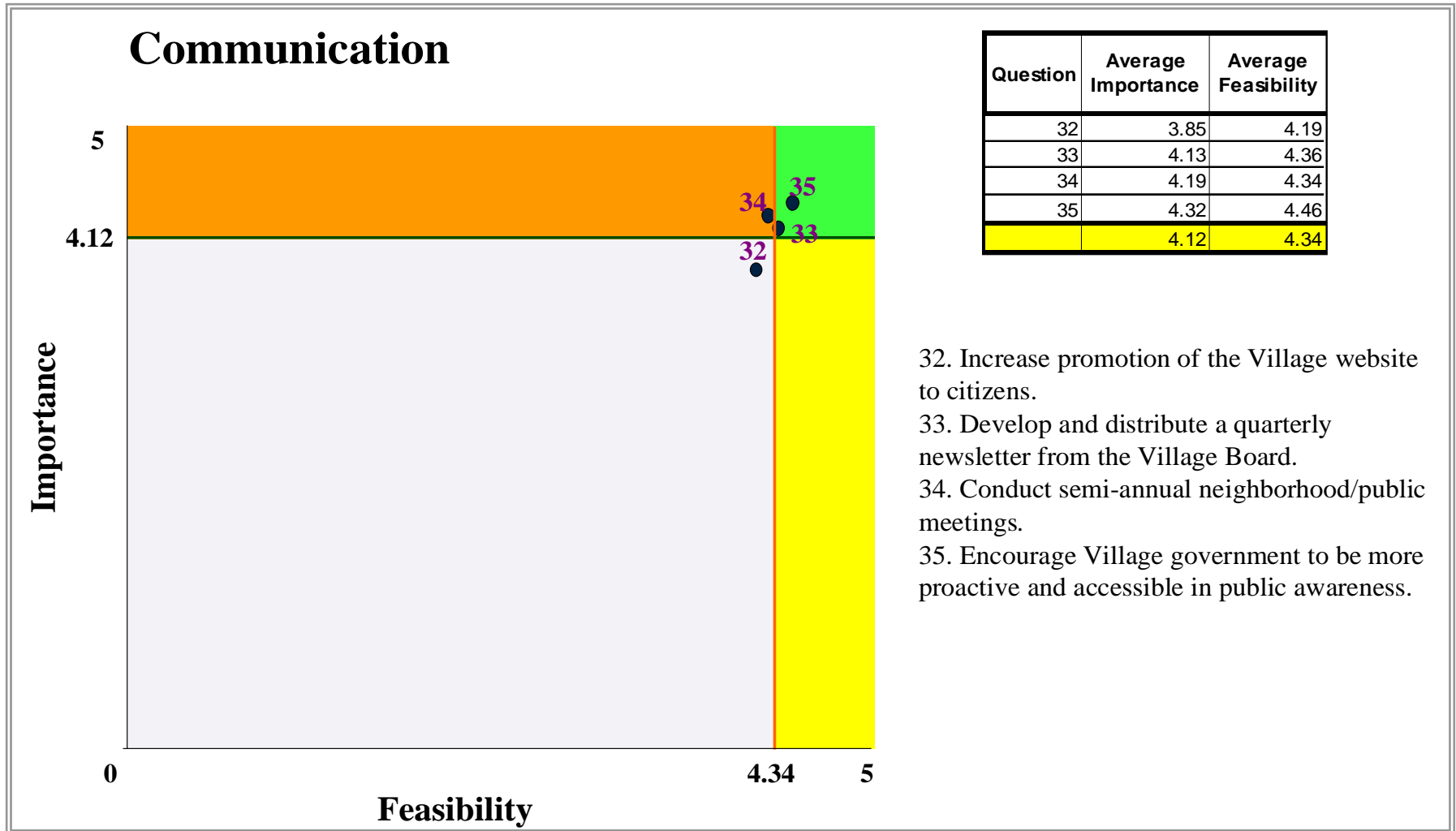
Historical & Cultural Resources



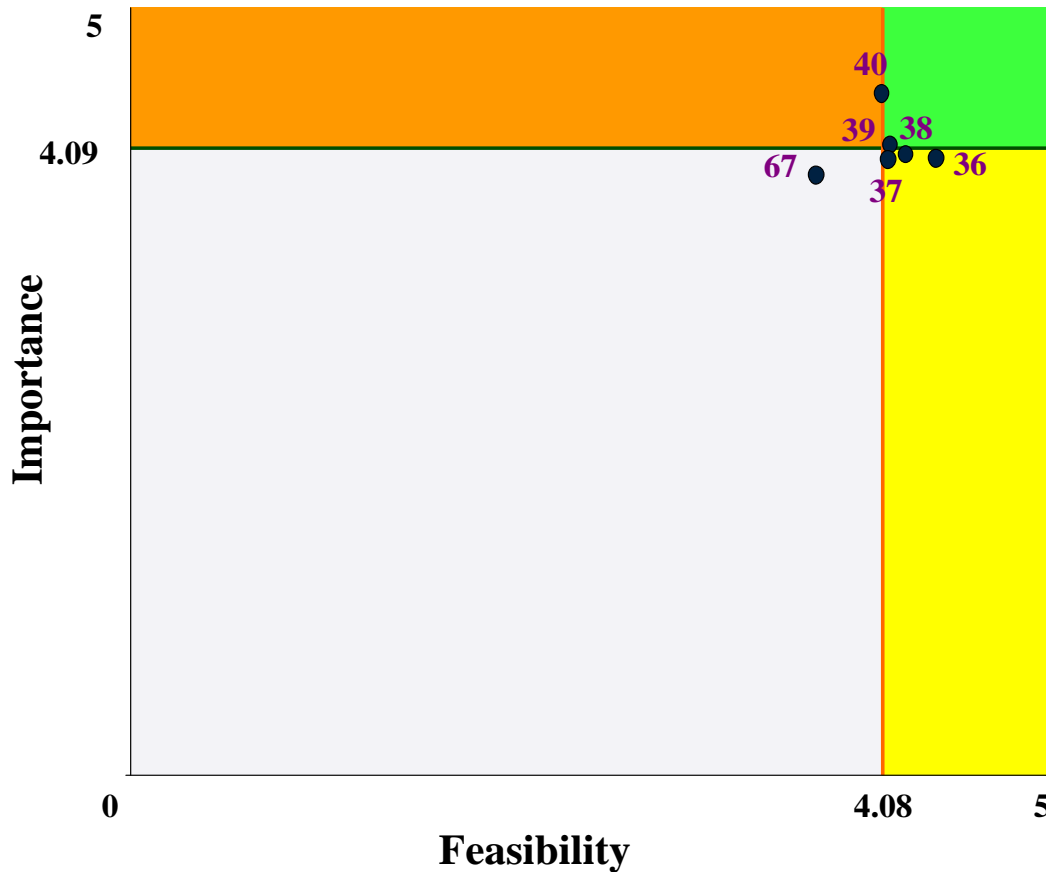
Question	Average Importance	Average Feasibility
21	3.57	4.00
22	3.55	3.96
23	3.79	4.06
24	3.30	3.78
25	3.73	4.09
26	3.63	3.74
27	4.04	3.96
28	4.46	4.17
	3.76	3.97

- 21. Create a Village Information Center.
- 22. Enhance promotion of the ZIM House.
- 23. Promote the historical society to the community.
- 24. Create a Village oral history project.
- 25. Promote Village history - internally and externally.
- 26. Develop a Village Winter Festival.
- 27. Enhance better utilization of existing Village buildings and activities.
- 28. Develop a full-service, combined Community, Library, Youth, and Senior Center.



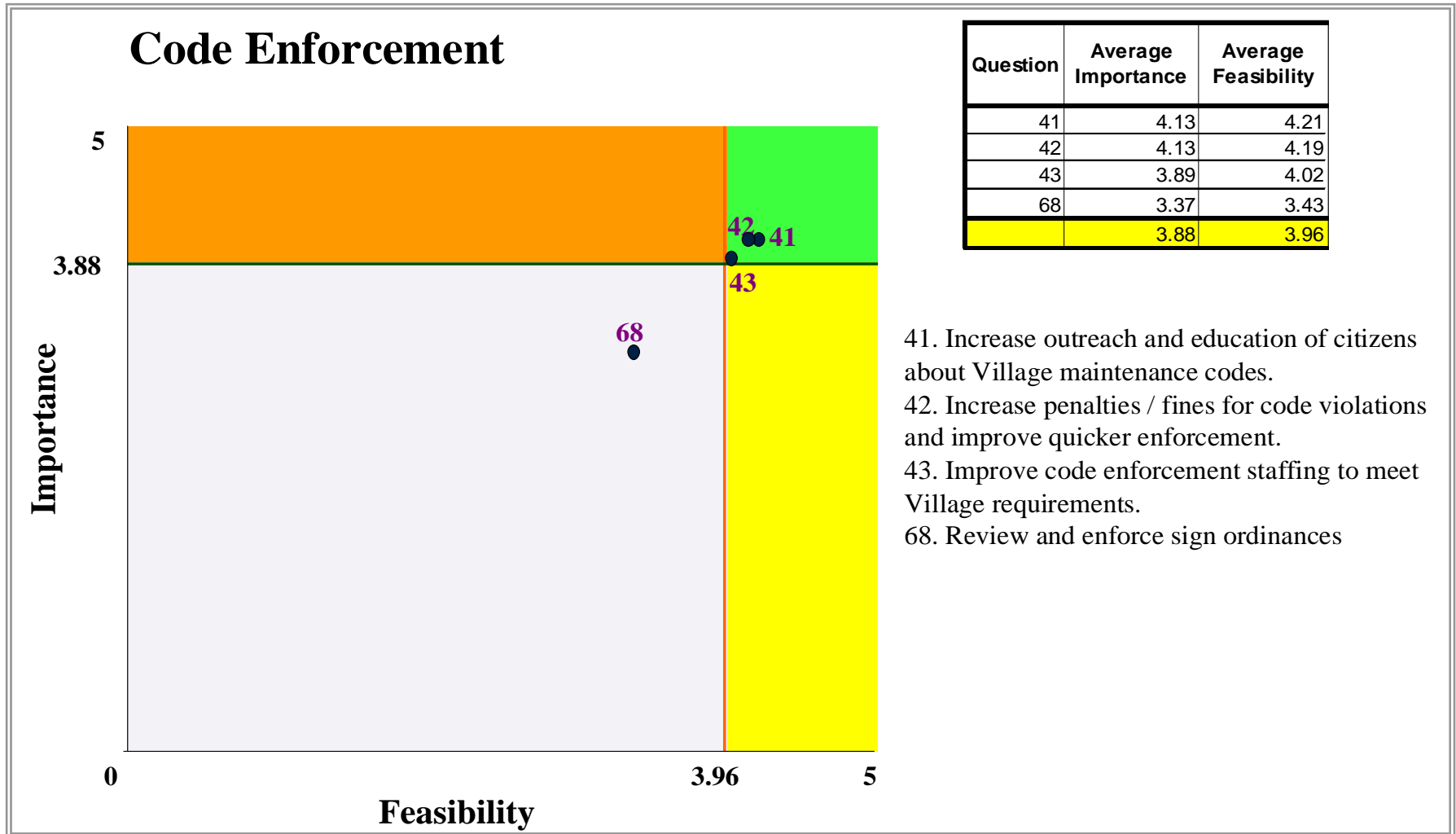


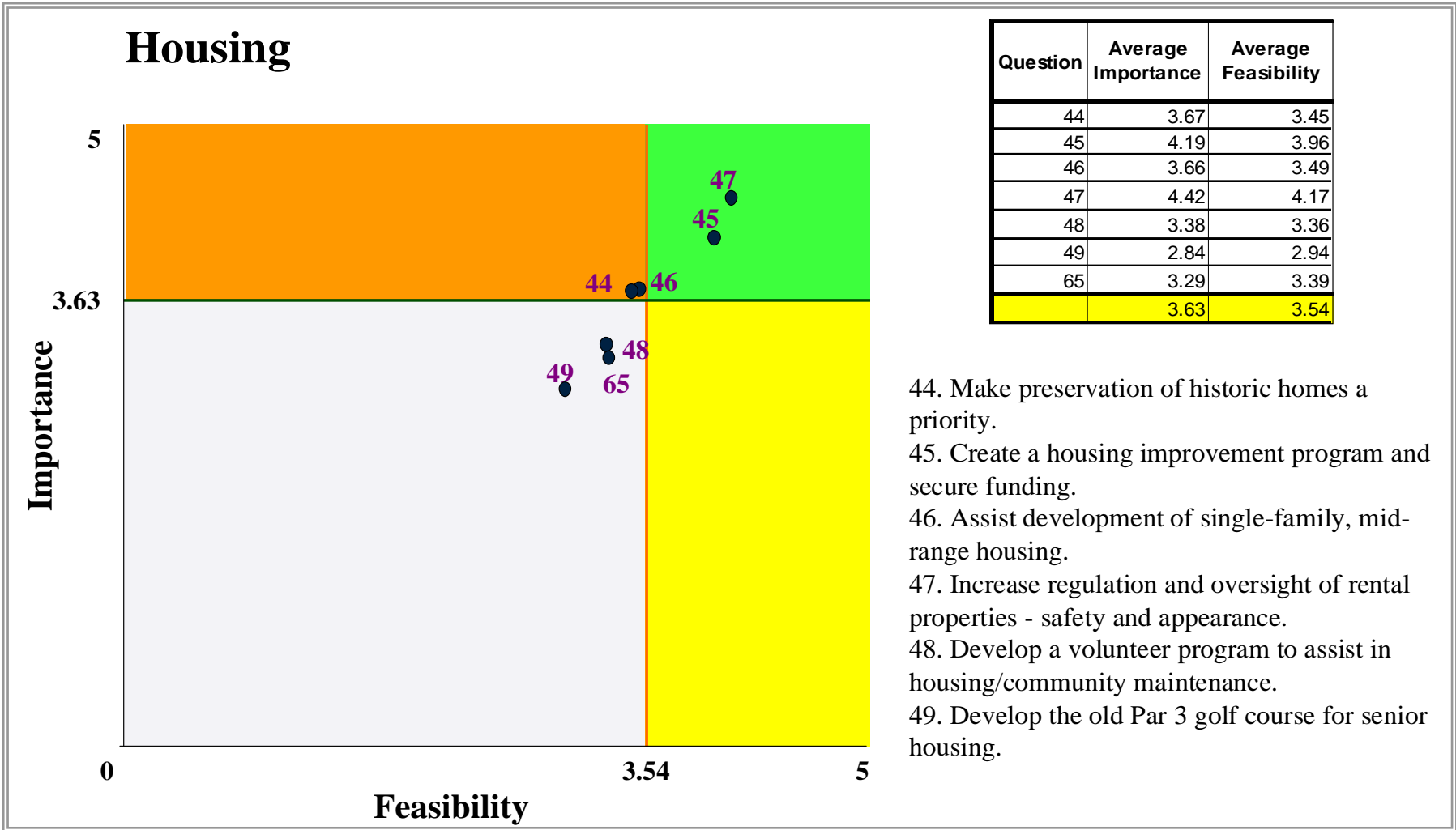
Municipal Services



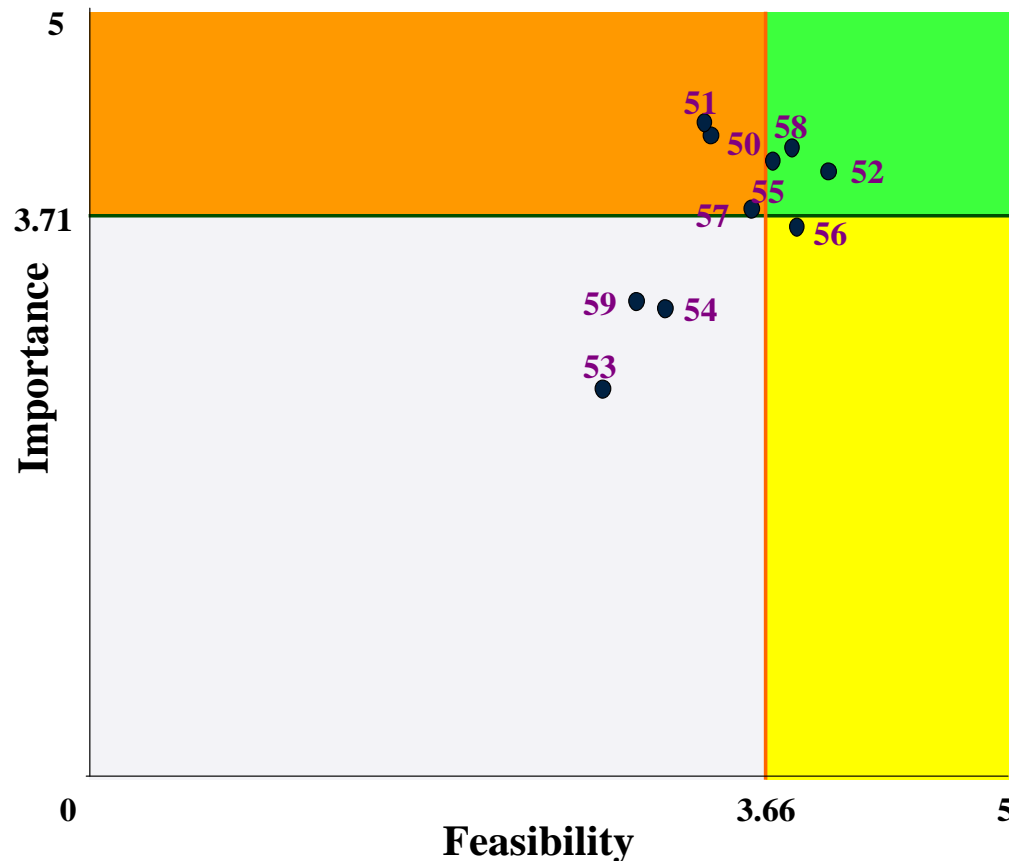
Question	Average Importance	Average Feasibility
36	4.06	4.30
37	4.00	4.11
38	4.04	4.22
39	4.06	4.10
40	4.47	4.08
67	3.90	3.67
	4.09	4.08

- 36. Re-instate the Village Dumpster Program.
- 37. Increase police visibility in the Village.
- 38. Develop a Neighborhood Watch Program.
- 39. Stricter enforcement of Village speed limits.
- 40. Recruit and train new members for volunteer fire department.
- 67. Investigate Shared Services opportunities.





Zoning & Land Use



Question	Average Importance	Average Feasibility
50	4.43	4.30
51	4.42	4.40
52	3.96	4.00
53	2.57	2.74
54	3.04	3.20
55	4.00	3.71
56	3.64	3.82
57	3.72	3.60
58	4.08	3.80
59	3.21	2.98
	3.71	3.66

- 50. Re-develop / rezone the Leprino / LRC area.
- 51. Protect the residential character of the Village through zoning.
- 52. Update zoning regulations to prohibit large homes from becoming multi-family.
- 53. Make changes to zoning to allow high-rise apartments in appropriate areas.
- 54. Allow "big box" store in appropriate locations.
- 55. Develop stricter design guidelines to protect the visual character of the Village.
- 56. Investigate different zoning allowances for older neighborhoods.
- 57. Require developers to provide parks / open space or pay impact fees to support recreation.
- 58. Remove or redevelop the Marshall feed-mill.
- 59. Pursue annexation of additional land.

