







Creating an Economic Development Vision for Whately

Prepared for the Whately Selectboard by the Franklin Regional Council of Governments and funded by the MA District Local Technical Assistance Program.

August 2018



Overview

What should Whately's economy look like in the next 10 to 20 years?

To help answer this question, three activities were undertaken.

- Data was collected about what Whately looks like today.
- Recent planning efforts were reviewed.
- Group exercise responses and findings were gathered from a community discussion held on June 27, 2018 at the Whately Elementary School.







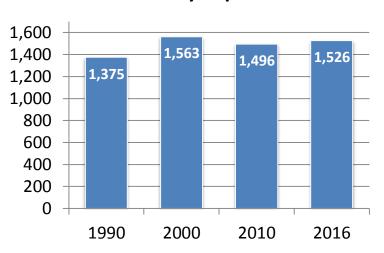
Whately Today

- Population
- Income
- Labor Force
- Industries and Employers
- Municipal Tax Base

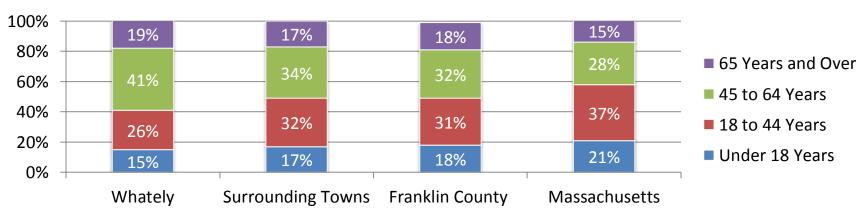
Population

- Estimated population of Whately is 1,526 in 2016. For Whately and surrounding towns*, the estimated total population is 17,820.
- ➤ In recent years, Whately has experienced a relatively stable population level. From 2000 to 2016, population changed by -2% in Whately and +1% in surrounding towns.
- ➤ 60% of Whately's population is 45 years old and over, compared to 51% in surrounding towns and 50% for Franklin County.

Whately Population



Percent of Total Population by Age Group

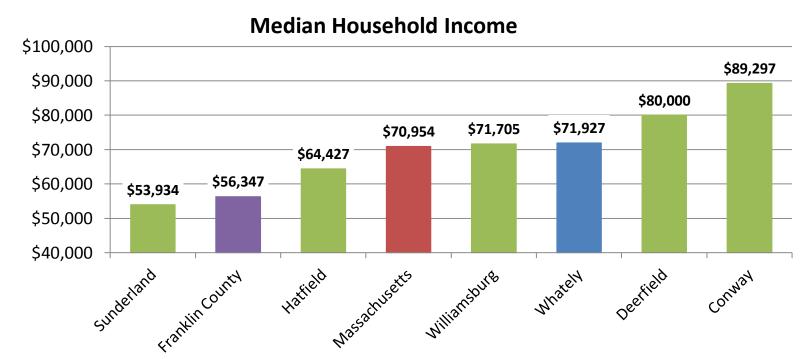


^{*} Information for "Surrounding Towns" includes aggregated data for the towns of Whately, Conway, Deerfield, Hatfield, Sunderland and Williamsburg.

Source: US Census Bureau, Decennial Population & Population Estimates; 2016 ACS Five-Year Estimates

Income

- Whately households generally have higher incomes, compared to the county, state and most surrounding towns.
- Whately's median household income (which includes families, unrelated people living together, and people living alone) is \$71,927. The median family income was slightly higher at \$73,782.
- There were 619 households in Whately and 4,903 households in surrounding towns. Sixty-nine percent (69%) of all households in Whately had a total annual income of \$50,000 or more, compared to 65% for surrounding towns, 55% for Franklin County, and 63% for Massachusetts.



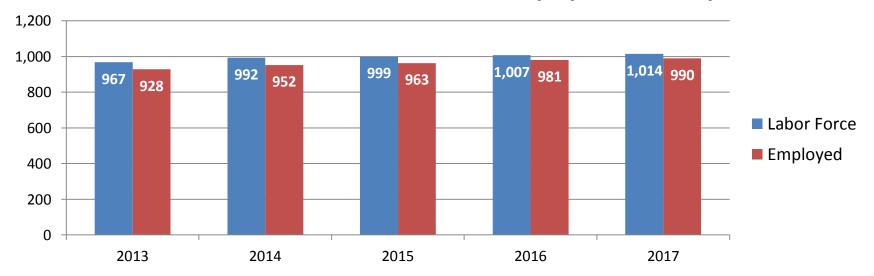
Labor Force

- Whately residents in the labor force experience low unemployment.
- The labor force includes employed people and unemployed people looking for employment.
- In recent years, Whately's total labor force grew by 4.9%. In comparison to surrounding towns that grew 1.9% and Massachusetts by 4.1%.

2017 Unemployment Rates

- 2.4% Whately
- 3.1% Surrounding Towns
- 3.3% Franklin County
- 3.7% Massachusetts

Size of Labor Force and Number of Employed in Whately



Where Residents Work

- According to this data source, 690 residents were employed in 2015.
- Most residents worked in nearby communities.
- Most residents worked in education and health care industries.

Home-based Workers

According to a different U.S. Census Bureau data set on travel to work characteristics, about 11% of Whately residents worked from home. This rate is higher than the county's rate of 6% and the State's rate of 5%.

Top Five Locations Residents Worked:

- Amherst (16%)
- Northampton (11%)
- Deerfield (6%)
- Springfield (6%)
- Hadley (6%)

Top Five Industries (by Jobs) Residents Worked in:

- Educational Services (23%)
- Health Care & Social Assistance Services (15%)
- Manufacturing (10%)
- Retail Trade (10%)
- Accommodation & Food Services (7%)

Workers Employed in Whately

- According to this data source, 1,337 workers had their primary job located in Whately in 2015.
- Most workers in Whately were employed in manufacturing or agriculture.
- Workers came from around the region for jobs in Whately.
- Few residents were employed in Whately businesses.

Inflow and Outflow of Workers

According to this data source, 651 employed residents left town to work, and 1,376 workers came to Whately for their job. As a result, there was an inflow of 725 workers coming to Whately.

Top Five Industries (by Jobs) in Whately:

- Manufacturing (55%)
- Agriculture, Forestry, Fishing & Mining (16%)
- Retail Trade (8%)
- Transportation & Warehousing (6%)
- Accommodation & Food Service (4%)

Top Five Locations where Workers come from:

- Greenfield (8%)
- Montague (5%)
- Northampton (5%)
- Sunderland (7%)
- Easthampton (4%)

Agriculture Businesses:

- Baystate Perennial Farm
- Bean's Maple Distillery
- Bear Path Farm
- Belder Farm
- Brookledge Sugarhouse
- Chamutka Farm
- Chang Farm, Inc.
- Enterprise Farm
- Fairview Farms
- Full Bloom Market Garden
- Golonka Farm
- Harvest Farm
- LaSalle Florists
- Long Plain Farm
- Manheim Farms
- Nasami Farm
- Northampton Co-op Auction
- Nourse Farms
- J.M. Pasiecnik Farms
- Poplar Hill Farm
- Potash Hill Farm
- Quonquont Farm
- Sobieski's River Valley Farm
- Scott Farm
- Tall Grass Farm
- W&W Farm

Local Businesses

Largest Employers:

- Yankee Candle Company, Inc.
- E.J. Prescott, Inc.
- Whately Diner
- Whately Inn

- Chang Farm, Inc.
- Whately Elementary School
- Judith Hunter, Consultant
- Northampton Co-op Auction

Whately Industrial Park

- 41 acres
- \$9.5 million assessed value
- 1 undeveloped parcel remains;
 Owned by Covestro LLC
- Employers in the Park:
 - Animal Eye Care of New England
 - Covestro LLC
 - Nupro Inc
 - Town of Whately
 - Goulet Trucking
 - Pioneer Valley Growers Assoc.



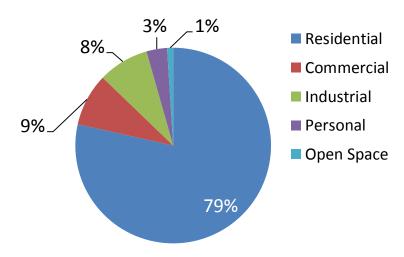
Municipal Tax Base

- 66% of Whately's municipal budget comes from the property tax levy, compared to 63% for surrounding towns and the county.
- The average single family tax bill in Whately is the fourth highest in Franklin County, and is close to the statewide median.
- 20.5% of Whately property taxes come from the commercial, industrial and personal property tax levy, compared to 18% for surrounding towns and 29% for the county.

Whately Property Tax Information

- Total assessed value of all property was \$256 million.
- \$15.60/\$1,000 property tax rate.
- Average single family tax bill of \$4,621.

Whately Tax Levy By Class



Recap of Trends

- Relatively stable population level
- Older resident population
- High household incomes

- Low unemployment
- Growth in size of resident labor force
- Most residents work out of town
- Top industries that residents are employed in are education and healthcare
- Town is a regional employment center, attracting workers from throughout Pioneer Valley region

- Significant agricultural sector
- Major manufacturing base
- Limited industrial land remaining

- Single family tax bill high, compared to the County
- Slightly higher percentage of property tax revenues from commercial, industrial and personal property, compared to surrounding towns



Recent Planning Efforts at a Glance

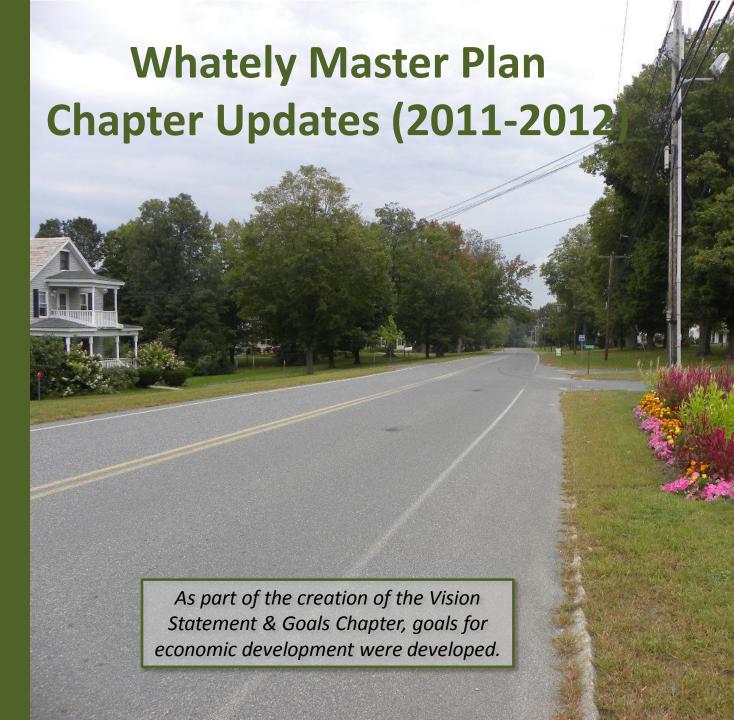
- ✓ Master Plan Chapter Updates (2011-2012)
- ✓ Whately Agriculture Brochure (2014)
- ✓ Community Food Assessment (2015)
- ✓ CSLD Whately Center Study (2016)

Four chapters of the Whately Master Plan were updated in 2011 to 2012.

The updated chapters:

- Vision Statement & Goals
- Housing
- Land Use & Zoning
- Natural Resources & Energy

The chapters were developed with input gathered from Whately Master Planning Committee meetings, a town-wide survey, and a public forum.



Vision Statement

What will Whately look like in 2025 and beyond? That is the question this vision statement strives to answer. Whately faces a challenge not unlike that of many other rural New England towns. That challenge involves planning to preserve important environmental and cultural resources in Town while engaging in the economic development needed to support the Town's tax base and to keep Whately a vibrant and sustainable town.

To meet that challenge, we envision preserving our agricultural lands and strengthening our farm businesses, helping to provide more living wage jobs and fresh, local food for Whately and its neighbors. We also foresee focusing other preservation efforts on those areas that sustain the health of our waters, forests, and wildlife as well as those areas that are the Town's most valued open spaces. These preservation efforts will help protect the unique rural character of our community and will safeguard Whately's historic and cultural resources. Along with creating more farm-based jobs, we will support sustainable economic growth by carefully planning commercial and industrial development to provide goods, services and additional jobs to our Town.

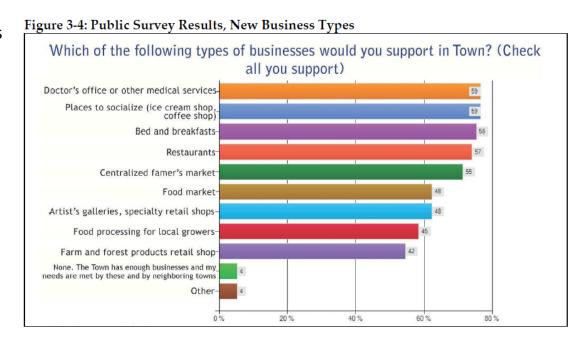
With more jobs in Town, we see a future with less reliance on having to drive long distances to seek work and a possibility of more young adults desiring to stay in Town and raise their families. To accommodate that growth, we will work to support a mix of housing opportunities in Whately which harmonize with the historic character of the Town and which, along with accommodating future generations, could potentially satisfy our aging residents who may want to live in more accessible homes. We will encourage all residential and commercial growth to occur using energy efficiency and affordability as guiding principles. With this vision firmly in place, in 2025 Whately will have met the dual challenges of preservation and sustainable development.

Vision Statement & Goals: Economic Development Goals

- Encourage economic, industrial, and commercial growth to occur in an orderly manner consistent with the best interests of the community as a whole and to discourage uncoordinated and incompatible development that may overburden public investment or damage the Town's natural resources and rural character.
- Promote the use of the Town's existing historic architectural styles in the development of new economic development initiatives.
- Encourage the Town to recognize and promote its historical character as an existing economic asset, which is coordinated with regional tourism activities.
- Support and maintain economic development that strengthens the municipal tax base.

Economic Development-Related Findings

- A lack of a diverse tax base means a heavy reliance on residential property owners.
- Support for new industrial development, with corresponding new infrastructure (i.e. sewer), should go along Routes 5 & 10 or in the existing industrial park only.
- Top types of new businesses supported – see chart.
- Greatest concerns of new business impacts were:
 - changes to rural character
 - loss of farmland, forestland or open space
 - higher traffic



Economic Development-Related Recommendations

- Consider a Farm Building Reuse Bylaw.
- Consider specific "Overlay District" bylaws in select focus areas of Town for limited commercial activities.
- Finish developing a Chapter 61 policy that prioritizes parcels in Chapter 61 program and allows Town to utilize its right of first refusal.
- Prioritize updating the Economic Development Chapter of the Master Plan.
- Encourage sustainable local forest-based and local farm-based economic activities.
- > Encourage Agricultural Commission to produce farm brochure.

Whately Agriculture Brochure (2014)

As recommended in the 2011-2012 Master Plan's updated Natural Resources & Energy Chapter, the Whately Agriculture Commission produced a brochure to describe and promote the community's agricultural industry.

The Commission identified 27 farm-based businesses in the Whately area.

Whately Farms— A thriving and important asset for our community.

The farm listings below showcase the bounty of Whately's farms. Soils that rival any in the world combined with the hard work and dedication of our farmers produce a wide variety of vegetables, fruits, flowers and nursery plants, honey, maple syrup, herbs, hay, livestock and forest products.

Our twenty-seven farms sell directly to local markets and restaurants, as well as to regional distributors, processors, and export markets. In addition to growing delicious food, Whately's farmers, stewards of the land, sustain beautiful working land-scapes and save precious open space. The diverse activities of Whately's farms contribute significantly to our local economy. In 2012, Whately's farmers.

- · cultivated 4,250 acres
- · employed more than 425 workers
- grossed revenues estimated at over \$20 million

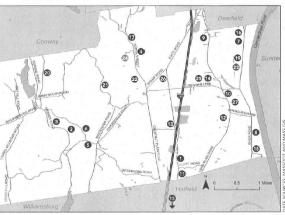
Whately has a lengthy history of productive farming which began before European settlement. The town is also home to businesses that provide important services to the region's agricultural industry, including the Pioneer Valley Grower's Association, the Northampton Cooperative Auction and C & A Repair.

Whately's farmers' willingness to adapt to modern practices has allowed agriculture to remain a vibrant core of the town's culture, providing an important source of jobs and economic returns.

- Baystate Perennial Farm
 36 State Road 413-665-3525
 www.baystateperennial.com
 Trees, perennials, shrubs
 Open April through September
- 2 Bean's Maple Distillery 80 Webber Road • 413-665-7404 Maple syrup and other maple products Drop-in sales during the maple season; sales by phone year-round
- 3 Bear Path Farm
 134 Webber Road + 413-665-2894
 www.bearpathfarm.com
 Compost, peaches, apples
 April through November, 8am to 6pm
 Call to arrange a compost delivery or
 pickup at the farm

- 4 Belder Farm 68 North Street • 413-665-3338 1st and 2nd cutting hay, call for hay availability. Wholesale Only: Milk
- S Brookledge Sugarhouse
 159 Haydenville Road + 413-665-2891
 www.brookledgesugarhouse.com
 Maple Products
 Drop-in sales during the maple season;
 sales by phone year-round
- O Chamutka Farm

 14 Conway Road
 Strawberries, peeled squash, organic
 products (pickling cukes, cabbage, tomatoes)
 Wholesale Only: look for our products
 at Big Y and River Valley Market and
 in Real Pickles





WHATELY AGRICULTURE

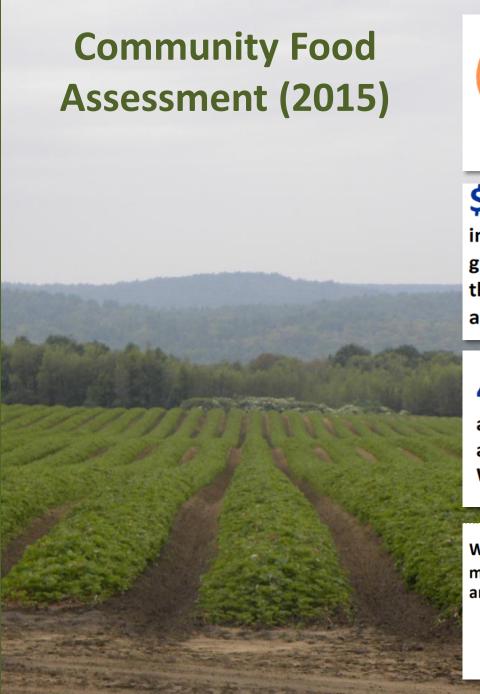
A vibrant core of our town's culture and economy.

Created by the Whately Agricultural Commission with assistance from the FRCOG.

Examined economic and other benefits of farms, as well as the cost of community services.

The Study assessed currently preserved farmland, and strategies to preserve additional farmland.

The Study also recommended that more Community Preservation Act (CPA) funds be used to help preserve farmland.



farms in Whately are vital to the Town's tax base

\$20 million in revenues are grossed by these farms annually



425 workers are employed annually by Whately farms



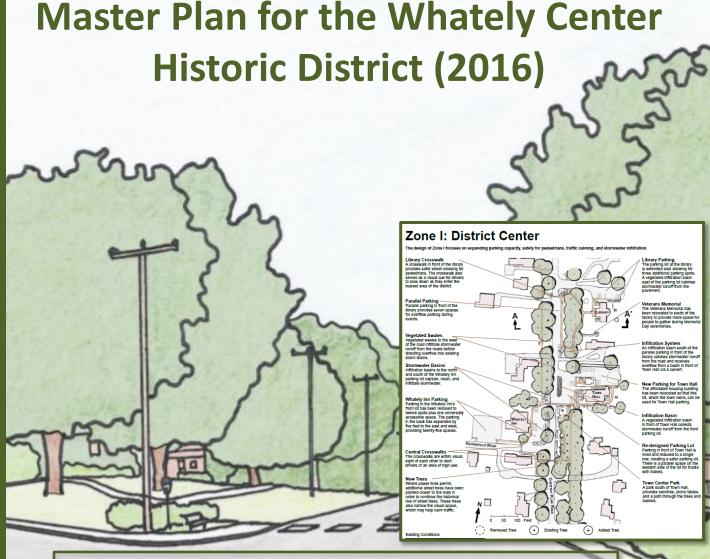
Whately farms create \$32 million in economic impact annually

For every dollar created by local farms, another 60¢ is reinvested in the local economy

A review and evaluation of historic Whately Center was conducted by the Conway School of Landscape Design.

The purpose of study was to make recommendations to create "a more walkable, attractive, and functional place."

The study's findings identified the need to improve pedestrian facilities, storm water management, parking capacity and more. Related to these findings specific design recommendations were illustrated in the final report.



Since the Study was completed, the renovation to transform the Town Hall into a community performance center is underway.

The Town is also developing a Complete Streets Plan, which may provide access to grant funds to implement improvements.



Creating an Economic Development Vision for Whately

- What are successful economic development outcomes for Whately?
- What should economic development look like in different areas of Whately?
- Are the Master Plan's Economic Development Goals applicable or should they evolve?
- What is the community's vision for economic development?

A few ideas to consider when developing a vision for economic development in Whately.

This list of questions can help identify potential economic development outcomes.

What types of outcomes would be appropriate and applicable to Whately?

What are successful economic development outcomes for Whately?

Supporting current businesses in Whately and helping them to continue to thrive?

Creating more jobs in Whately?

Attracting and supporting the growth of new businesses in Whately?

Providing more goods and services to residents?

Creating a dynamic community space that includes business activity?

Creating a more resilient local economy?

Increasing the commercial and/or industrial tax base contribution to the municipal budget?

Balancing economic growth and community character?

Or a combination of outcomes?

Group Exercise #1.
What should successful economic development outcomes in Whately look like?

Step 1:

Potential economic development outcomes were grouped by topic area and listed on large posters.

Participants were invited to add any potential outcomes missing from this list to the posters. Items added to the list are in **bold red font**.

What are successful economic development outcomes for Whately?

BUSINESSES

Support existing businesses
Attract new businesses

TARGET INDUSTRIES

Agriculture

Manufacturing

Food/Restaurant

High Tech

Retail

Tourism

JOBS

More jobs

Jobs for residents

Higher wage jobs

CHARACTER

Preserve historic buildings
Protect farmland
Maintain scenic resources

MUNICIPAL FUNDING

More government services

Lower tax rate

Lower home tax bill

SPACES

More industrial sites

Expanded area for commercial uses

Co-working, mixed use space or incubator

Dynamic village center

SUSTAINABILITY

"Green" business practices

More resilient environment

Cleaner environment

Diversity of industries

Group Exercise #1. What should successful economic development outcomes in Whately look like in the future?

Step 2.

Each participant had three sticker dots and was asked to place them on the outcomes that are their highest priorities.

Based on this feedback here is the list of most frequently selected outcomes.

What are successful economic development outcomes for Whately?

Top Priority Outcomes Selected:

- Attract new businesses.
- Co-working, mixed use, or incubator space
- Maintain scenic resources

Additional Priority Outcomes:

- Dynamic village center
- Protect farmland
- ➤ Higher wage jobs
- Restaurant/café

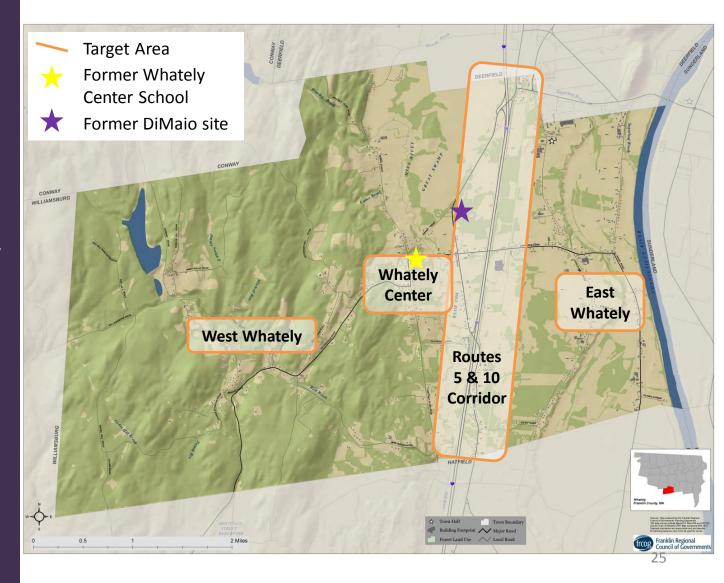
Other Outcomes Selected:

- Expanded area for commercial uses
- "Green" business practices
- Lower home tax bill
- More resilient environment.
- Preserve historic buildings
- Support existing businesses
- > Tourism

Participants were divided into two discussion groups. They were asked to identify the assets and opportunities in each area, and what successful economic development should look like in these areas.

Participants were also asked what future uses would be appropriate for two Town-owned properties: the former DiMaio restaurant site and the former Center School.

What should economic development look like in different areas of town?



Preferred Type of Economic Development:

- Support outdoor recreation tourism.
- Encourage home-based businesses.

West Whately

Assets & Opportunities:

- Smith College's McLeish Station & trails
- Possibility for additional hiking trails
- Create wildlife trails
- Snowmobile trails
- Use old roads to create trails
- Trails will need maintenance
- Watermelon Wednesdays
- Chapel
- Potential for Bed & Breakfasts
- Internet access available
- A good place for home-based businesses
- Determine status of the hut on Dry Hill Road Extension
- Need for forest management plans
- Need to understand what parcels are protected and the ownership of large parcels
- Haydenville Road in need of repair

Preferred Type of Economic Development:

- Encourage small scale tourism that targets bicyclists and visitors attending local events.
- Foster small business(es) in the former Center
 School, such as a café or multi-tenant office space.

Whately Center

Assets & Opportunities:

- Views from Chestnut Plain Road
- Town Hall renovation into a performing arts & community center
- Potential reuse of former Center School
- Presence of Whately Inn and Quonquont Farm
- Potential to improve walking connections between Whately Inn and Quonquont Farm

Center School Property Reuse Ideas:

- A place for food in the morning or daytime, such as a coffee shop or café
- Small business incubator or co-working space
- A business that caters to bicyclists
- Allow mixed use with business on the 1st floor and housing on the 2nd floor

Preferred Type of Economic Development:

 Encourage tourism services (such as a restaurant) that is accessible to people traveling on I-91.

Routes 5 & 10 Corridor

Assets & Opportunities:

- Easy I-91 highway access to transport people and goods; Potential to draw visitors to restaurants or retail destinations from I-91
- Land near I-91 Exit 24 could be developed; Need to confirm water supply access
- The nearby Yankee Candle Company flagship store is a major attraction to the region
- The Tea Guys outlet store attracts visitors at a small scale
- Nasami Farm attracts visitors from far away
- Sugarloaf Shops complex underutilized
- Need signage to "brand" Whately and direct visitors
- With presence of rail line, possible future passenger rail stop?

Former DiMaio Restaurant Property Reuse Ideas:

- Restaurant
- Co-working or similar small scale, multi-tenant business use
- Mixed use with business use on first floor and housing in upper floor
- Housing on site and additional housing on nearby parcels

Preferred Type of Economic Development:

- Support current farms and expand agricultural sector.
- Enhance outdoor recreation amenities.

East Whately

Assets & Opportunities:

- Cluster of farms.
- Historic barns and agriculture architecture.
- As farming is an economic engine is there potential for additional farm and food businesses, such as developing higher value products or promoting organic products.
- Outdoor recreation assets, such as snowmobile trails, baseball fields and more.
- Campsite accessible only from the Connecticut River and part of the Connecticut River Paddlers Trail.
- Enhance the Tri-Town Beach property for multiple season use (e.g. skating in winter) and/or privatize functions, such as a restaurant.
- No public access to Connecticut River. Explore potential for public access to river.

Group Exercise #3.

After considering what successful outcomes could be and the economic development opportunities found in different areas of town, let's consider the 2011-2012 Master Plan Update's Economic Development Goals.

Do they continue to apply or should they evolve?

What else should be factored into these goals?

How does our discussion relate to these Economic Development Goals?

2011-12 Master Plan Update: Economic Development Goals

- Encourage economic, industrial, and commercial growth to occur in an orderly manner consistent with the best interests of the community as a whole and to discourage uncoordinated and incompatible development that may overburden public investment or damage the Town's natural resources and rural character.
- Promote the use of the Town's existing historic architectural styles in the development of new economic development initiatives.
- Encourage the Town to recognize and promote its historical character as an existing economic asset, which is coordinated with regional tourism activities.
- Support and maintain economic development that strengthens the municipal tax base.

Group Exercise #3.

After considering what successful outcomes could be and the economic development opportunities found in different areas of town, let's consider the 2011-2012 Master Plan Update's Economic Development Goals.

Do they continue to apply or should they evolve?

What else should be factored into these goals?

How does our discussion relate to these Economic Development Goals?

Comments and Considerations

- Overall, the Economic Development Goals developed in 2011-2012 remain relevant. In particular, maintaining historic character and natural resources continue to be priorities.
- Whately has farms and other food producers with valued added products, such as maple syrup. Objectives should promote and assist with the resilience of local farm and food businesses. Is there an opportunity for a farmers' market in town?
- In addition to the Town's history and character, the community has assets to encourage outdoor recreation tourism. Support for more infrastructure and amenities to promote this sector could be encouraged. For example: access to a public bathroom for bicyclists touring through Town. Small businesses can be developed to provide goods and services to these tourists.
- How can the Town brand itself to easily communicate its assets and identity?
- Do the current Zoning Bylaws protect what residents most value and that are appropriate in the context of that location?
- What are development restrictions, such as wetlands, that could impact the Routes 5 & 10 corridor?
- Should residential development be supported and will the tax revenues support new residential development?

Group Exercise #4. What is the overarching theme? What do we want the world to know about the Town of Whately's vision for economic development?

And can this vision be condensed into one or two sentences?

Overarching Theme

Themes developed by participants:

- "Bountiful Whately."
- "Responsible and sustainable use of the bounty/beauty of our land to promote sustainable living, work and leisure for people of all ages."
- "Whately is an agricultural gem nestled in the forward leaning Pioneer Valley in Western Massachusetts, where 21st Century technology is cosseted in 18th Century history and 19th Century landscapes. Hills, forests, a great grand river, plains, even a swamp, give backdrop to a place where you can live well, earn a living, enjoy an evening."



Summary

A summary of key points based on participant discussions:

- ➤ The 2011-2012 Master Plan Update's Economic Development Goals continue to be applicable, with maintaining historic character and natural resources continuing to be priorities.
- Interest in continuing to support local farm and food businesses, and helping the industry sector to be resilient and expand.
- Interest in recognizing the outdoor recreation assets of the community, and encouraging related responsible small scale business creation.
- Interest in attracting and fostering small businesses, such as through the creation of a co-working, mixed use or incubator space.
- Interest in leveraging convenient access to I-91 for appropriate business development, such as restaurant development on buildable land near I-91 exits.
- ➤ The foundation for Whately's vision of economic development is the town's historic character and natural environment, as it provides business development opportunities as well as a strong community identity to attract visitors and bring together residents .



Recommendations

The following are a list of recommendations based on the research conducted and participant discussions.

- Complete the Master Plan update, by conducting a planning process to create chapters on economic development, transportation, community services and facilities, and cultural and historic resources. An updated Economic Development Chapter will establish the objectives to accomplish goals, and outline the specific actions to be taken. Similarly an updated Open Space & Recreation Plan can provide context for outdoor recreation economic development initiatives.
- The Massachusetts Department of Housing & Community Development's Massachusetts Downtown Initiative (MDI) is a competitive award program open to municipalities seeking professional assistance on a range of topics, including wayfinding and branding. If awarded, the MDI provides expert consultant services to help the municipality develop a community brand and corresponding wayfinding signage. The application process for the MDI typically occurs annually in the fall.
- Continue to participate in the MassDOT Complete Streets Program to implement pedestrian facility, streetscape and other improvements.
- Evaluate the town-owned Center School and former DiMaio site for prospective reuse options.