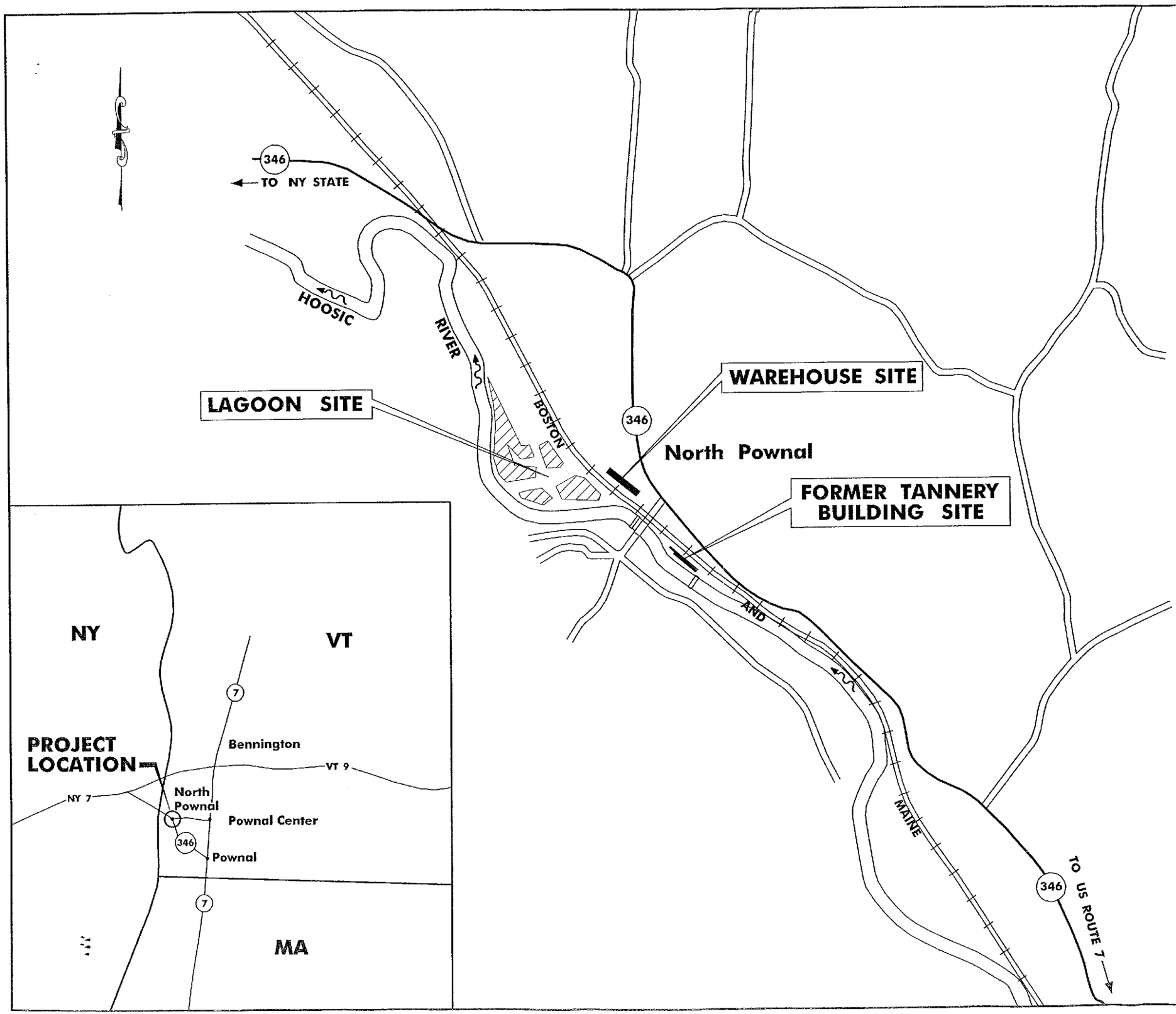
APPENDIX A

FIGURES



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GPI

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Albany, New York 12205
(518) 453-9431
(518) 453 9456 (Fax)

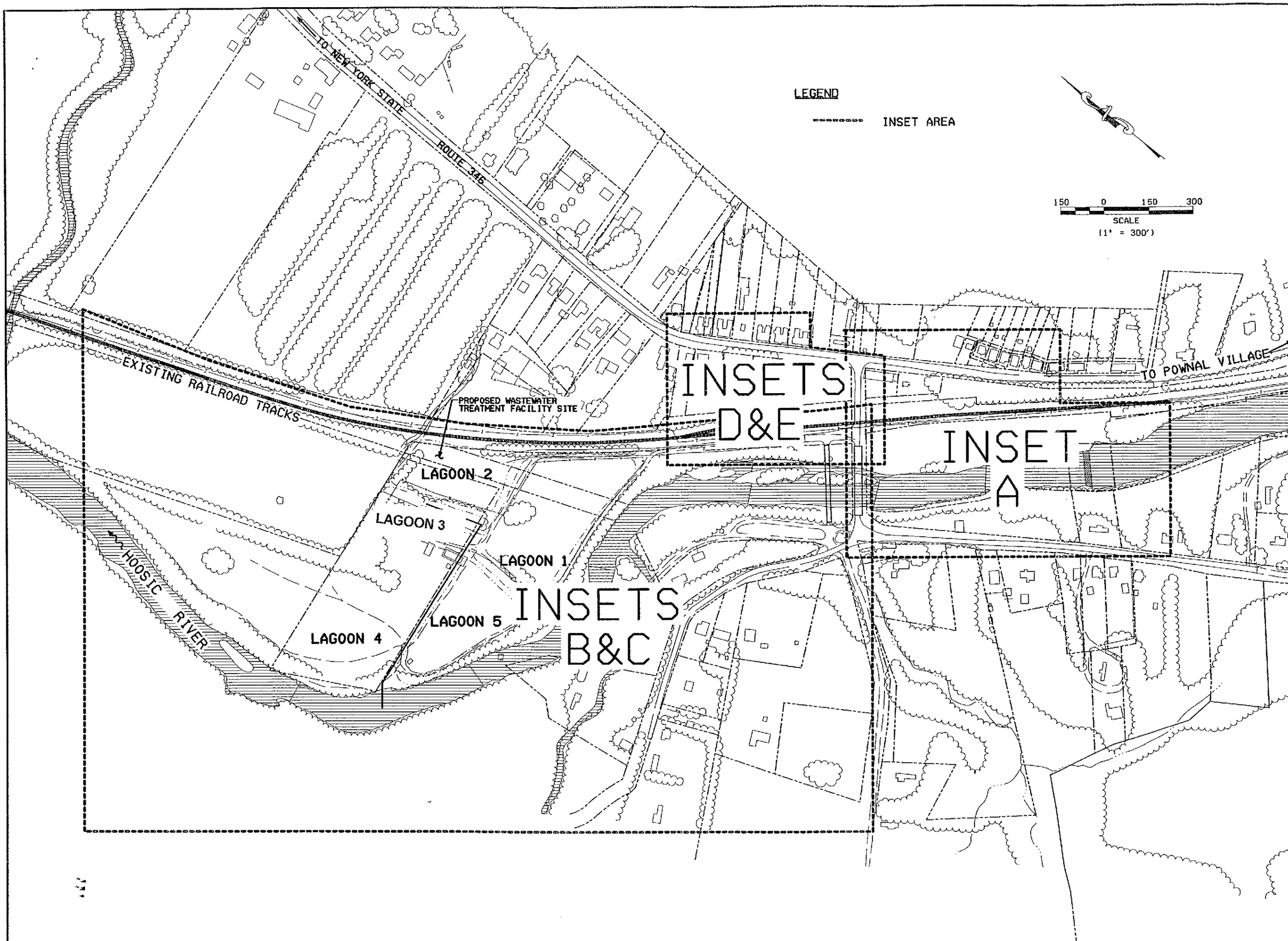
TOWN OF POWNAL

POWNAL TANNARY REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

PROJECT LOCATION MAP

DESIGNED A.C.	GPI PROJECT NO. 2000012.00
DRAWN GPI	FA & A PROJECT NO. 00108
CHECKED R.R.	FIGURE NO. 1
DATE FEB. 2001	



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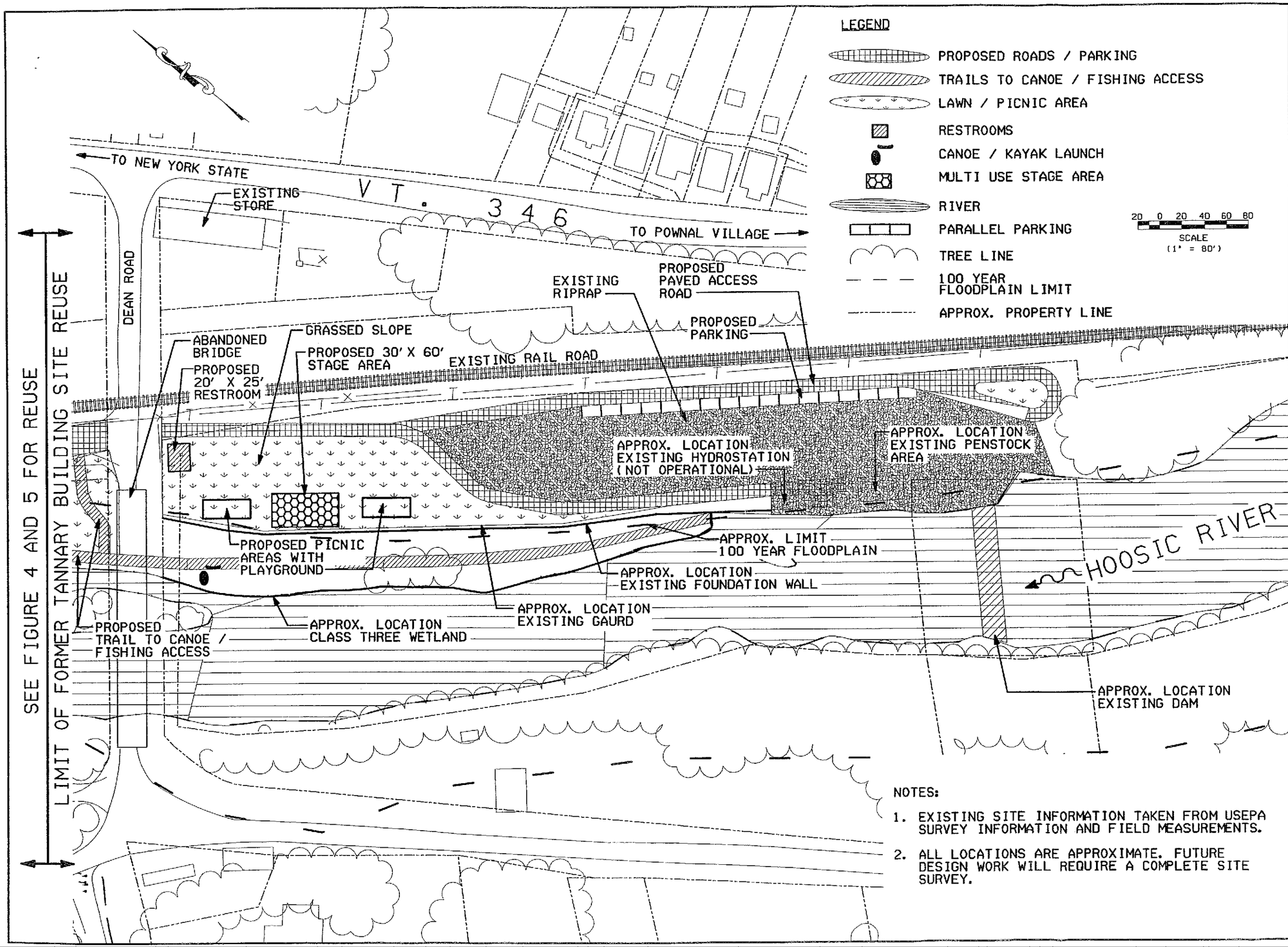
TOWN OF POWNAL

POWNAL TANNARY REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

SITE MAP

DESIGNED A.C.	GPI PROJECT NO. 2000012.00
DRAWN GPI	FA & A PROJECT NO. 00016
CHECKED R.R.	FIGURE NO. 2
DATE FEB. 2001	



NOTES:

1. EXISTING SITE INFORMATION TAKEN FROM USEPA SURVEY INFORMATION AND FIELD MEASUREMENTS.
2. ALL LOCATIONS ARE APPROXIMATE. FUTURE DESIGN WORK WILL REQUIRE A COMPLETE SITE SURVEY.

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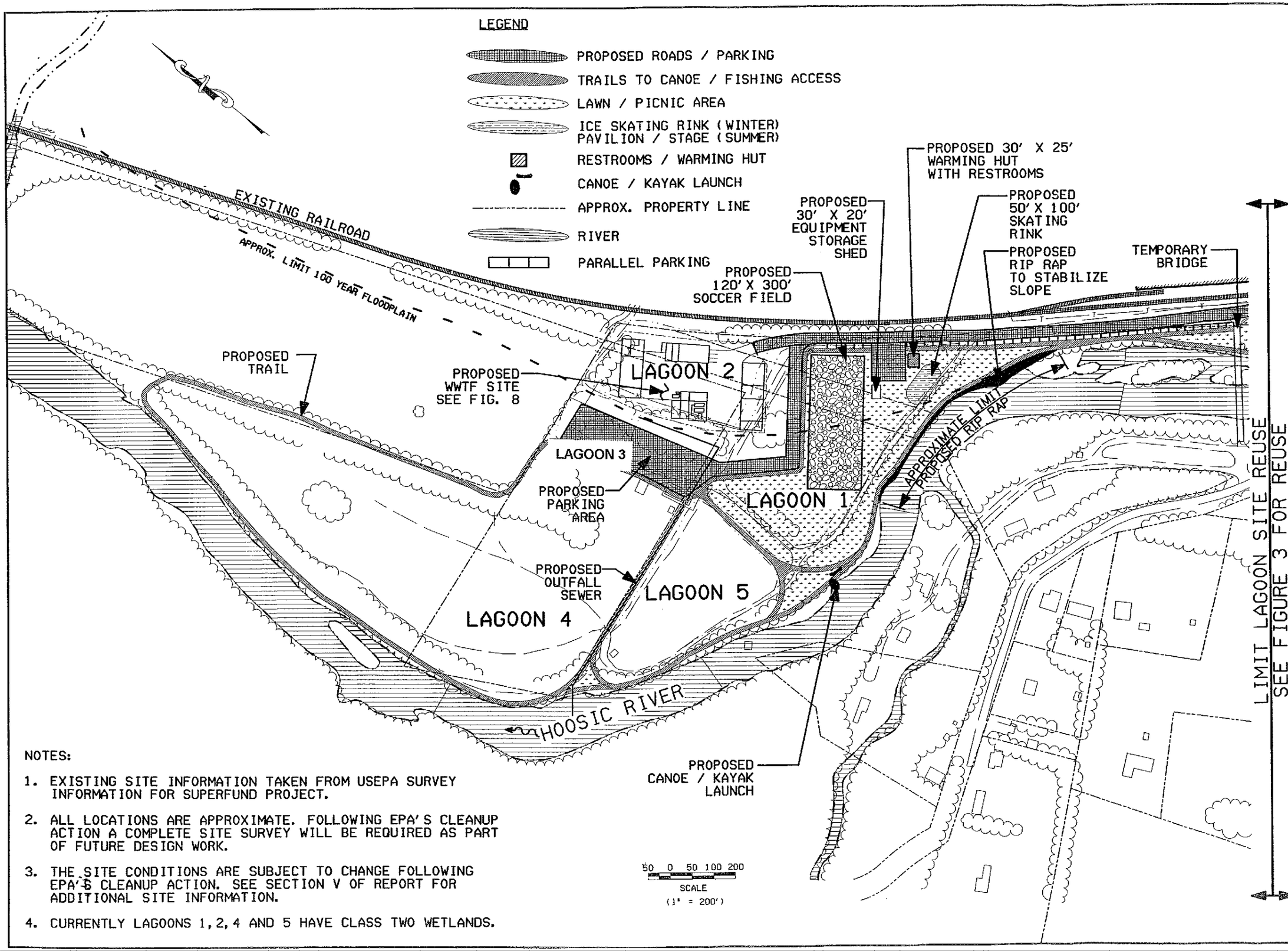
TOWN OF POWNAL

POWNAL TANNARY REUSE ASSESSMENT

INSET A
FORMER TANNARY BLDG. SITE RECOMMENDED REUSE

NO.	DATE	REVISION DESCRIPTION	CHECKED

DESIGNED A.C.	GPI PROJECT NO. 200002.00
DRAWN GPI	FA & A PROJECT NO. 00103
CHECKED R.R.	FIGURE NO. 3
DATE FEB. 2001	



NOTES:

1. EXISTING SITE INFORMATION TAKEN FROM USEPA SURVEY INFORMATION FOR SUPERFUND PROJECT.
2. ALL LOCATIONS ARE APPROXIMATE. FOLLOWING EPA'S CLEANUP ACTION A COMPLETE SITE SURVEY WILL BE REQUIRED AS PART OF FUTURE DESIGN WORK.
3. THE SITE CONDITIONS ARE SUBJECT TO CHANGE FOLLOWING EPA'S CLEANUP ACTION. SEE SECTION V OF REPORT FOR ADDITIONAL SITE INFORMATION.
4. CURRENTLY LAGOONS 1, 2, 4 AND 5 HAVE CLASS TWO WETLANDS.

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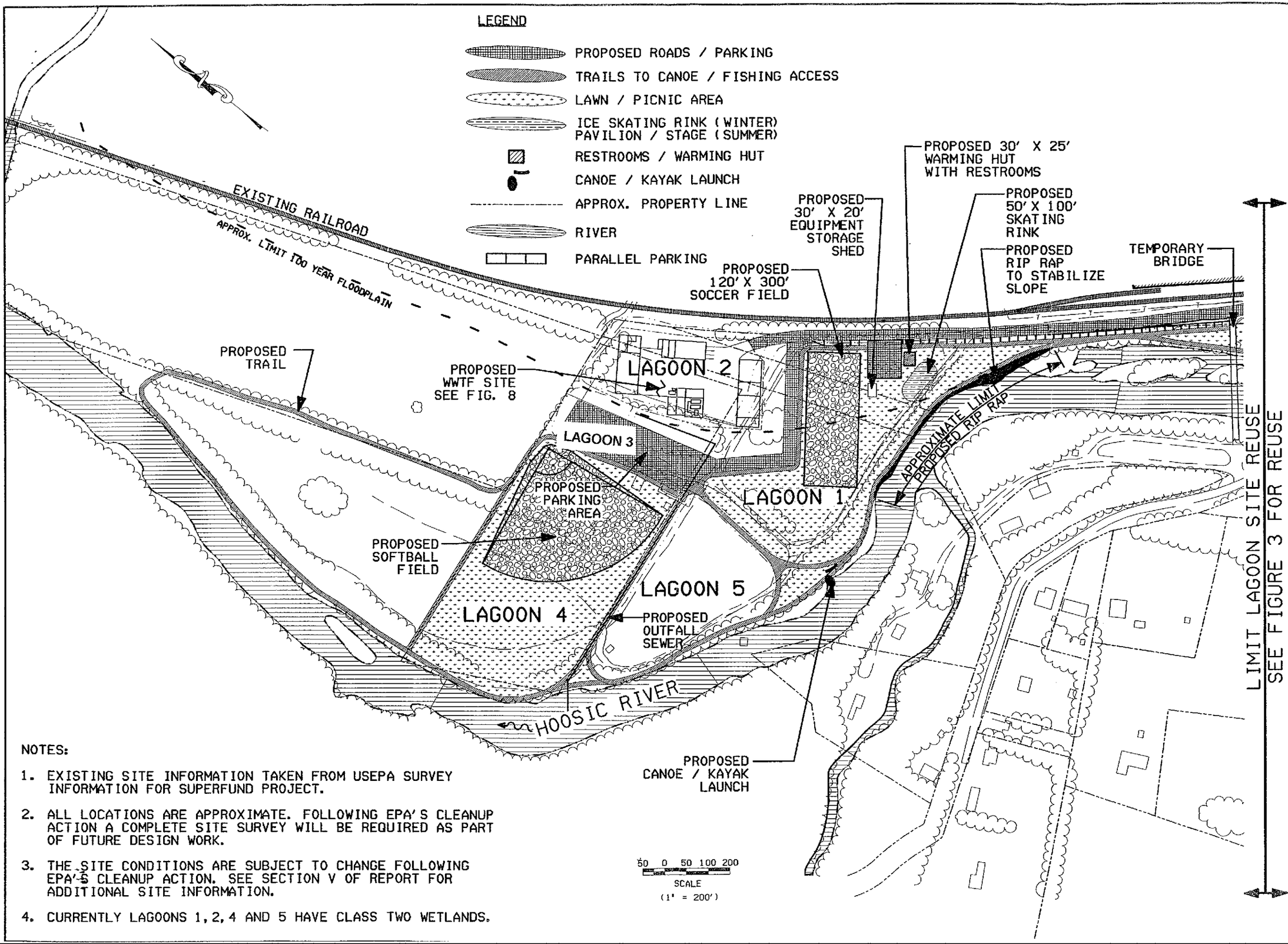
TOWN OF POWNAL

POWNAL TANNARY
REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

INSET B
LAGOON SITE
REUSE ALTERNATIVE No. 1

DESIGNED A.C.	GPI PROJECT NO. 2000012.00
DRAWN GPI	FA & A PROJECT NO. 00108
CHECKED R.R.	FIGURE NO. 4
DATE FEB. 2001	



NOTES:

1. EXISTING SITE INFORMATION TAKEN FROM USEPA SURVEY INFORMATION FOR SUPERFUND PROJECT.
2. ALL LOCATIONS ARE APPROXIMATE. FOLLOWING EPA'S CLEANUP ACTION A COMPLETE SITE SURVEY WILL BE REQUIRED AS PART OF FUTURE DESIGN WORK.
3. THE SITE CONDITIONS ARE SUBJECT TO CHANGE FOLLOWING EPA'S CLEANUP ACTION. SEE SECTION V OF REPORT FOR ADDITIONAL SITE INFORMATION.
4. CURRENTLY LAGOONS 1, 2, 4 AND 5 HAVE CLASS TWO WETLANDS.

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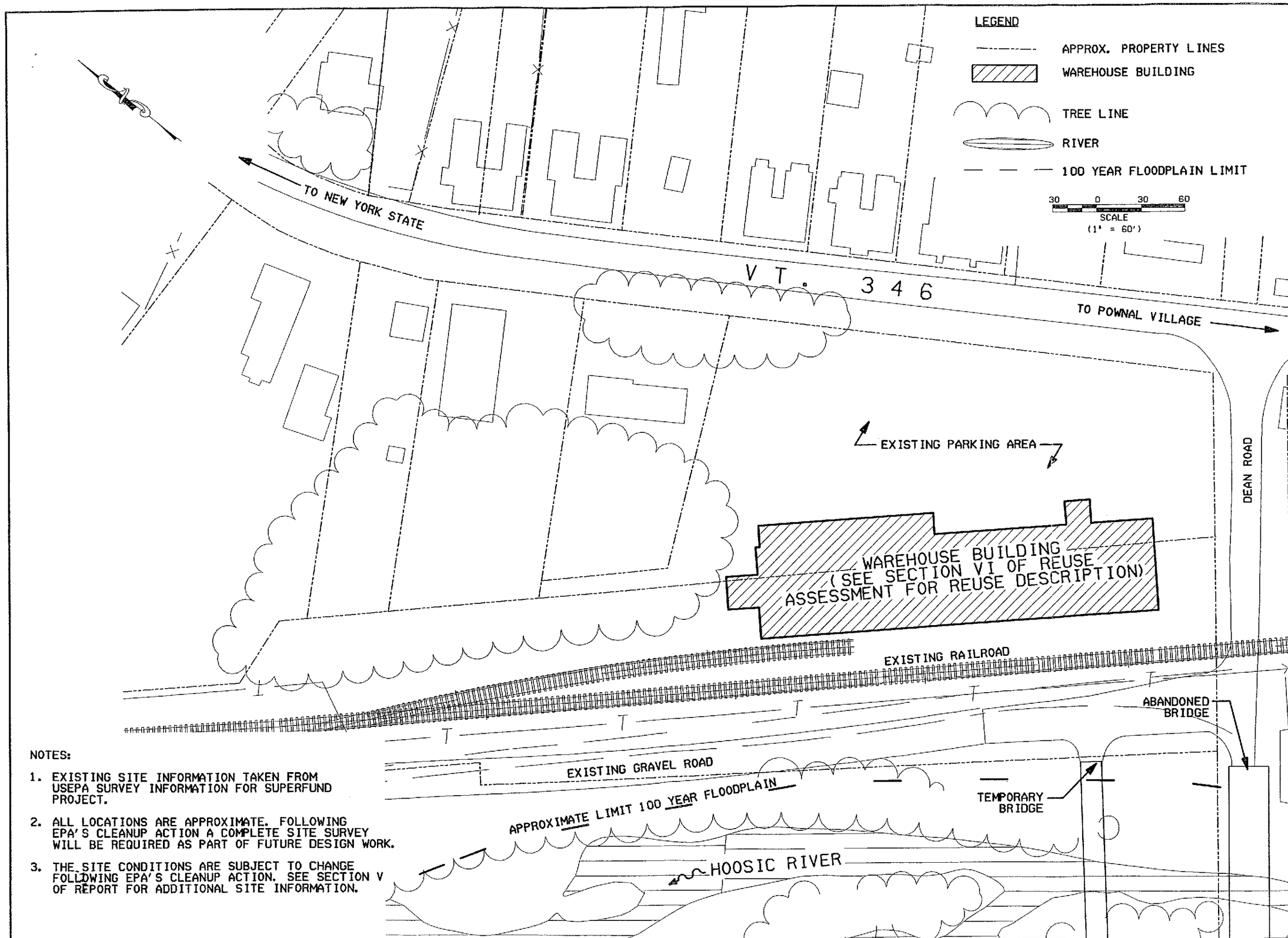
TOWN OF POWNAL

POWNAL TANNARY
REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

INSET C
LAGOON SITE
REUSE ALTERNATIVE No. 2

DESIGNED A.C.	GPI PROJECT NO. 2000012.00
DRAWN GPI	FA & A PROJECT NO. 0010B
CHECKED R.R.	FIGURE NO. 5
DATE FEB. 2001	



NOTES:

1. EXISTING SITE INFORMATION TAKEN FROM USEPA SURVEY INFORMATION FOR SUPERFUND PROJECT.
2. ALL LOCATIONS ARE APPROXIMATE. FOLLOWING EPA'S CLEANUP ACTION A COMPLETE SITE SURVEY WILL BE REQUIRED AS PART OF FUTURE DESIGN WORK.
3. THE SITE CONDITIONS ARE SUBJECT TO CHANGE FOLLOWING EPA'S CLEANUP ACTION. SEE SECTION V OF REPORT FOR ADDITIONAL SITE INFORMATION.

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GPI

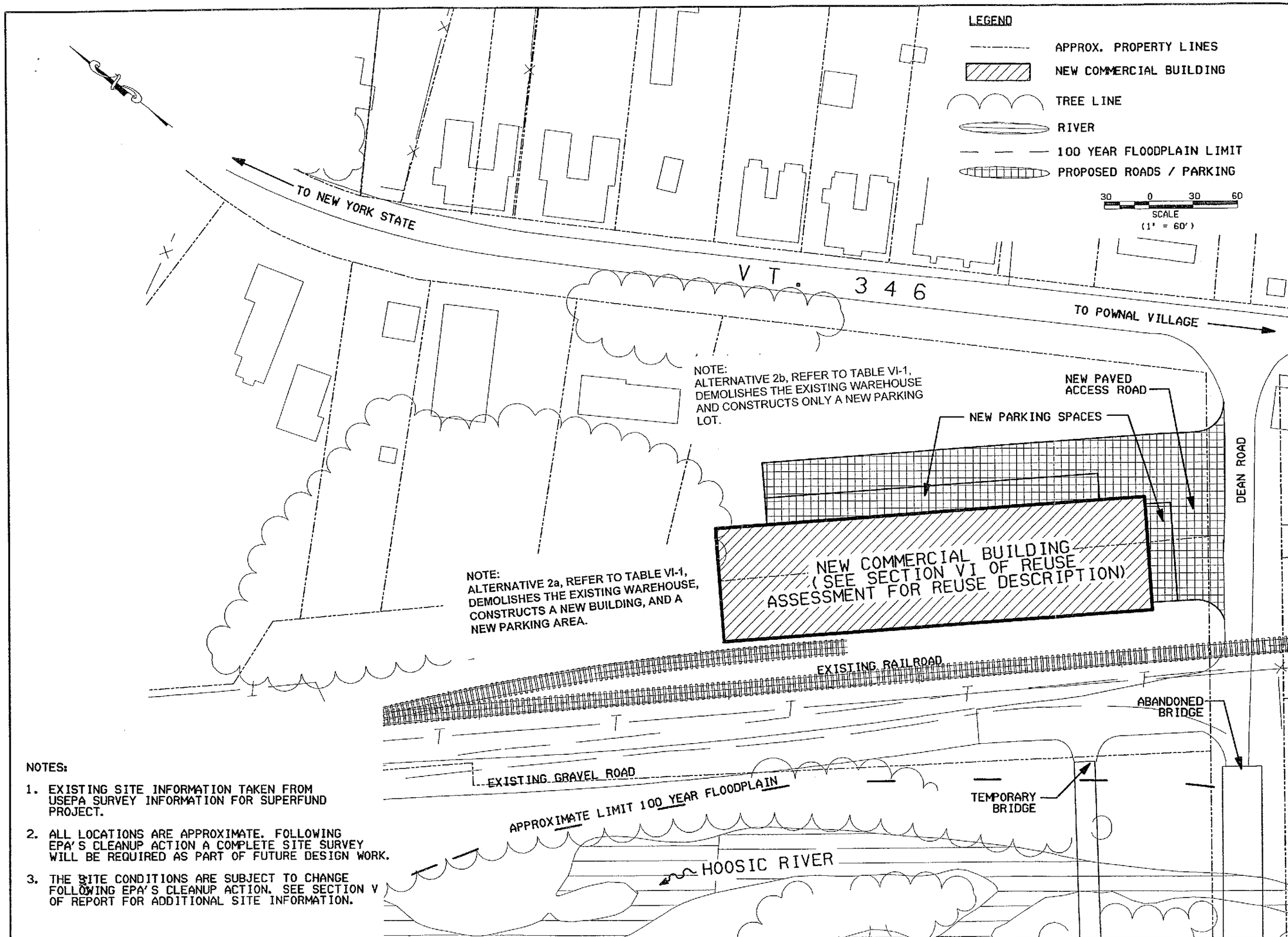
TOWN OF POWNAL

POWNAL TANNARY
REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

INSET D
WAREHOUSE SITE
REUSE ALTERNATE No. 1

DESIGNED A.C.	GPI PROJECT NO. 2000D02.00
DRAWN GPI	FA & A PROJECT NO. 0006
CHECKED R.R.	FIGURE NO. 6
DATE FEB. 2001	



NOTES:

1. EXISTING SITE INFORMATION TAKEN FROM USEPA SURVEY INFORMATION FOR SUPERFUND PROJECT.
2. ALL LOCATIONS ARE APPROXIMATE. FOLLOWING EPA'S CLEANUP ACTION A COMPLETE SITE SURVEY WILL BE REQUIRED AS PART OF FUTURE DESIGN WORK.
3. THE SITE CONDITIONS ARE SUBJECT TO CHANGE FOLLOWING EPA'S CLEANUP ACTION. SEE SECTION V OF REPORT FOR ADDITIONAL SITE INFORMATION.

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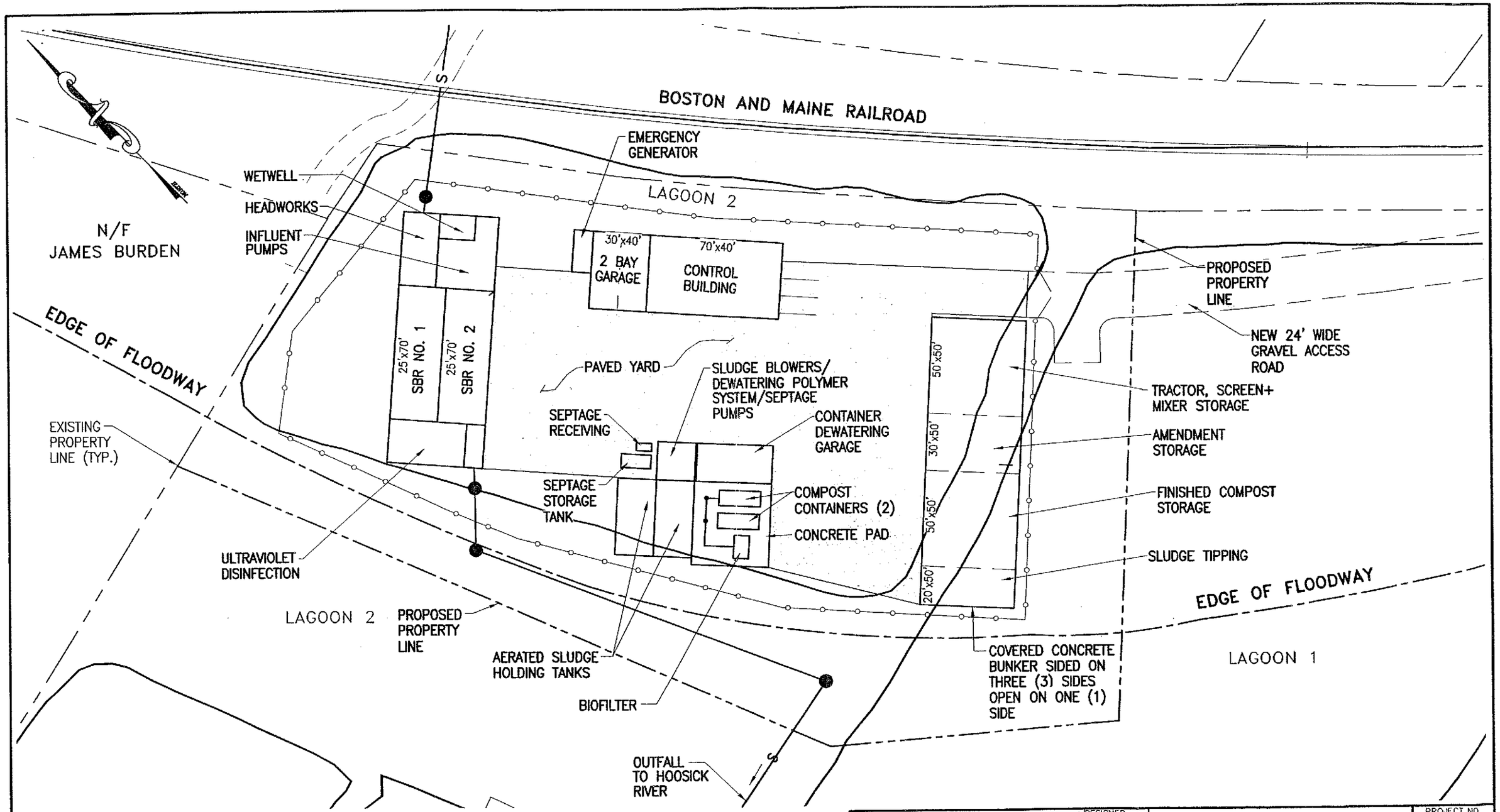
TOWN OF POWNAL

POWNAL TANNARY
REUSE ASSESSMENT

NO.	DATE	REVISION DESCRIPTION	CHECKED

INSET E
WAREHOUSE SITE
REUSE ALTERNATE No. 2

DESIGNED A.C.	GPI PROJECT NO. 2000012.00
DRAWN GPI	FA & A PROJECT NO. 00108
CHECKED R.R.	FIGURE NO. 7
DATE FEB. 2001	



SITE PLAN

SCALE: 1"=50'

NOTES:

1. FIGURE NO. 8 WAS TAKEN FROM THE FA&A AUGUST 2000, TOWN OF POWNAL WASTEWATER FACILITIES PLANNING PRELIMINARY ENGINEERING REPORT, FIGURE NO. 22.

Forcier Aldrich & Associates

Consulting Engineers

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(802) 879-1742 (Fax)

DESIGNED	KJC
DRAWN	BRR
CHECKED (PM)	DEP
CHECKED (PE)	DEP
SCALE	AS NOTED
DATE	FEB. 2001

PROPOSED WWTF SITE PLAN

POWNAL TANNERY, REUSE ASSESSMENT

TOWN OF POWNAL

POWNAL VERMONT

PROJECT NO. 00108

FIGURE NO. 8

APPENDIX B

SAMPLE SOLICITATION QUESTIONNAIRES

PUBLIC QUESTIONNAIRE

SURVEY OF REUSE IDEAS FOR THE POWNAL TANNERY BUILDING AND LAGOON SITES

Idea	Reuse Description	Do you like this idea (Yes/No) ?	Your Comments
	RECREATIONAL IDEAS		
1.	Boat/Canoe/Tube Rental/Launch/Fishing Areas/River		
2.	Walking/Nature/cross country ski/jogging or bicycle		
3.	Skateboarding/In Line Skating Area		
4.	Ice Skating Rink (inc. hockey)		
5.	Golf Course/Pitch&Putt/Driving or Archery Range		
6.	Lawn/Picnic Areas/Shelters/Birdwatching/horseshoe pits		
7.	Indoor Mixed Sports Facility–basketball,Swimming,		
8.	Outdoor Mixed Sports Facility – Baseball, football,		
9.	Observatory		
	MUNICIPAL IDEAS		
10.	Wastewater Treatment Facility		
11.	Pownal Fair grounds		
12.	Pownal Historical Society Display		
	COMMERCIAL IDEAS		
13.	Office/Bank/Conference rooms complex		
14.	Daycare/Amusement/Conference Center		
15.	Arts and Crafts		
16.	Sporting Goods Store (inc. fishing equip.)		
17.	Sports Equipment (inc. bicycle) Rental		
18.	Retail Space(s)/Shopping/Business Center		
19.	Daycare		
20.	Amusement Arcade/Club House		
	INDUSTRIAL IDEAS		
21.	High-tech Industrial Park or single facility		
22.	Low-tech Industrial Park or single facility		
	OTHER		
23.	*College Campus Annex/Learning Center*		
24.	*Research Park/Facility*		
25.	*Gradated Elderly/Retirement Housing*		
26.			
27.			
28.			

ADDITIONAL COMMENTS AND IDEAS
(If you need additional space, please continue on back of sheet)

1. Please write "Yes" or "No" next to each Reuse idea – write "Yes" if you like the idea, "No" if you do not like the idea
2. For each reuse idea you like, indicate how much you like it on a scale of 1-3 with 1 being excellent, 2 being good and 3 being fair.
3. Please indicate specific preferences. For instance, Idea 2 is "Walking/nature/cross country ski/jogging or bicycle trails" If you prefer bicycle trails over walking trails (or vice versa), please indicate this preference under "Your Comments".
4. You are welcome to attend the first Public Informational Meeting to be held July 12, 2000 with the formal presentation at 7 p.m. and an open forum at 6 p.m. The public meeting will be held at the North Pownal Fire Station.
5. If you have questions on this form, please call the offices of Greenman-Pedersen, Inc. (802) 442-1566, Ext. 221.

SCHOOL QUESTIONNAIRE

SURVEY OF RECREATIONAL USES OF THE POWNAL TANNERY BUILDING AND LAGOON SITES

***Please return completed form to either the Pownal Town Office or Transfer Station by Friday, June 23.**

RECREATIONAL REUSE IDEAS	Do you like this idea (Yes/No)?	Your Comments
Boat/Canoe/Tube Rental/Launch/Fishing Areas/River		
Walking/nature/cross country ski/jogging or bicycle		
Skateboarding/In Line Skating Area		
Ice Skating Rink (inc. hockey)		
Golf Course/Pitch&Putt/Driving or Archery Range		
Lawn/Picnic Areas/Shelters/Birdwatching/horseshoe		
Indoor Mixed Sports Facility–basketball,Swimming,		
Outdoor Mixed Sports Facility – Baseball, football,		
Observatory		
OTHER		

Is there a recreational activity that is not currently offered in the Bennington area that you would want to see at the former Tannery site?

1. Please write "Yes" or "No" next to each Reuse idea – write "Yes" if you like the idea, "No" if you do not like the idea.
2. For each reuse idea you like, indicate how much you like it on a scale of 1-3 with 1 being excellent, 2 being good and 3 being fair.
3. Please indicate specific preferences. For instance, Idea 2 is "Walking/nature/cross country ski/jogging or bicycle trails" If you prefer bicycle trails over walking trails (or vice versa), please indicate this preference under "Your Comments".
4. If you have questions on this form, please call Alison Church at the offices of Greenman-Pedersen, Inc. (802) 442-1566, Ext. 221.

APPENDIX C

MARKET DEMAND ANALYSIS

Market Demand Analysis
Pownal Tannery Site
Pownal, Vermont

Prepared for:

Greenman-Pedersen, Inc.

January, 2001

RER Economic Consultants, Inc.,
950 Herndon Parkway
Suite 200
Herndon, VA 20170

RER Economic Consultants

a Division of RER Resources Limited Partnership

January 17, 2001

Mr. Russel Ryan, P.O.E.
Forcier Aldrich and Associates, Inc.
6 Marketplace
Suite 2
Essex Junction, Vermont 05452

Ms. Alison Church
Greenman-Pedersen, Inc.
43 Fuller Road
Albany, New York 12205

Dear Mr. Ryan and Ms. Church:

This will submit our findings, conclusions, and recommendations regarding commercial development potential of available land at The Tannery site in Pownal, Vermont. This report includes the Market Demand Analysis for the Reuse Assessment Study for the Pownal Tannery site. RER's market analysis is under a subcontract with Greenman-Pedersen, Inc. The EPA contract is under the direction of Mr. Russel Ryan of Forcier Aldrich and Associates, Inc. Data was collected and analyzed during Fall, 2000.

I trust that the attached report covers all required market data and recommendations which meet the requirements of the Community Needs Assessment. I remain available to continue to assist you with the analysis of the reuse of The Tannery site. Please call if additional information or clarification are needed.

Sincerely,

Stuart M. Patz
President

SMP/mec
[Tannery.ltr]

R · E · R
RESOURCES
L. P.

950 Herndon Parkway, Suite 200, Herndon, Virginia 20170 • (703) 742-6789 • FAX (703) 742-3335
Herndon, VA • Boca Raton, FL • Dallas, TX

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Executive Summary

The former Tannery site and the lagoon site are planned for public recreation with fishing, boating, hiking, and other outdoor activities.

The warehouse site is 1.2 acres, of this, the warehouse portion has approximately 20,000 square feet. The parking area has approximately 33,000 square feet of land area. None of the site is served by public water and sewer at present.

The warehouse is under a short time lease. Reuse potential of the site is predicated on the Town of Pownal taking ownership of the property. The site size, current lack of utilities, location and market trends do not support any private development. The timetable for providing public sewer service is 2003.

Current market research indicates that new commercial development in Pownal is not strong. For any commercial market that may exist, The Tannery site is not the best location. A Route 7 setting is far more marketable.

Thus, recommendations for The Tannery site are as follows:

1. The proposed investment for a large outdoor recreation facility is a good one and would be an attractive addition to the Bennington area tourist/visitation draw, not a duplication. If well done and expansive, this could be a major draw for visitors. The Bennington Area Chamber of Commerce would welcome a new visitor draw.

   Canoe/Kayak rentals, fishing gear rentals, etc could generate some revenue for the Town if small fees are charged to non-residents of Pownal.

2. The warehouse does not represent a compatible use in the future. The warehouse could remain leased until the recreation area is open and then removed. However, this building could bring $20,000+ per year in revenue for the Town if owned by the Town. An alternative option is to increase rent slightly as there are no other buildings locally that can be leased at this low rent, and keep the building in place as long as it is leased.

3. The parking area of 33,000± square feet has potential for commercial development.

There are no private sector operations that appear practical for the subject property, given the problems with the site--size and location. Public investment would be risky given available retail and industrial properties in other parts of the Bennington area. The primary opportunity would be to build upon the expected investment at the property for recreation use and expected visitor attraction.

Introduction

The following is a Market Demand Analysis of the potential reuse of The Pownal Tannery Superfund Site (Tannery) that represents one part of a larger reuse assessment study of the property. The reuse assessment includes two parts. One is a Community Needs Assessment that is being prepared by Greenman-Pedersen, Inc. (GPI) and Forcier Aldrich and Associates, Inc. which entails an analysis of public input and desires for the reuse of the property. The Market Demand Analysis, to follow, is a subset of the Community Needs Assessment, as it is designed to "test" the market potential of development concepts proposed by the citizens of Pownal and to evaluate market support for other development proposals based on local market trends. The report by RER Economic Consultants (RER) is under a subcontract to GPI.

Site Description and History

The Tannery property is located on the west side of State Route 346 (Main Street) in the Village of North Pownal in the Town of Pownal. The site is located on the Hoosic River at Avery Place (Map A).

It is the site of a former hide tannery and finishing facility that closed in 1988 when the Pownal Tannery Company, Inc. declared bankruptcy. The property was designated a superfund site by EPA in 1998 and approved for removal of site contaminants in 1999.

The Tannery property consists of numerous parcels and these are under various ownerships. The original Tannery property includes: (1) 71 acres of woodland area on the east site of Route 346, (2) 900 acres of forest and woodlands on the west side of the Hoosic River in the mountains, (3) 15± acres in the hazard waste dump area, (4) a 16-acre lagoon area, and (5) the existing warehouse and parking lot along Route 346 with approximately 1.2 acres. There are also several small parcels on both sides of the old bridge across the river.

The warehouse building is the only building remaining on the property. It is a 16,900± square foot steel framed facility with cement block walls, tin roof and wooden additions on the side. It is presently occupied as a warehouse for wood pellets. The wood chip maker who rents the building currently pays $1,700 per month in rent.

The building and Tannery property have no water or sewer service. Thus, the warehouse is rented for a modest $1.21 per square foot to a user who requires no sewer or water service. There are no employees at the site, just wood pellet storage. The 33,900± square foot parking

area that adjoins the warehouse is not presently used by the building tenant.

Based on public input to date and interest from Town officials, the majority of the site is planned for a wide range of passive and active recreational uses, given the site's river and mountain setting. Current plans are for Town officials to take ownership of much of the property. There is no timetable for the change in ownership, but this could occur by mid-2001 based on current negotiations, and whether ownership can transfer without legal implications.

The available site for commercial use includes the 1.2 acres that comprise the warehouse and parking area. The remainder of the property is set aside for recreational use. Thus, the subject site for the market study is the 1.2± acres that is currently developed with the warehouse and parking area. There is no desire by Town officials or citizens of Pownal to develop the other parcels within the property for commercial use.

Based on interviews with town officials, there is a reported desire by the tenant to remain at the warehouse under the current lease. The following market study will assess this proposal, as part of the assessment of other potential commercial (and industrial) uses for the Tannery property.

Site Location and Setting

The site is located in a rural, low-density setting. A small food/variety store is located along Dean Road at Route 346 and directly across from the subject property. On the east side of Route 346 is a small cluster of mature homes and mobile homes. A few houses are scattered along Route 346, but the area is largely underdeveloped with farms and meadowland. The area to the west of Route 346 is mountainous with some homes.

Route 346 is not the primary road in Pownal and is most often used by local residents rather than by commuters and tourists. It was a bypass route in the past (15 or more years ago) when the Green Mountain Race Track was in operation, as Albany area citizens bypassed downtown Bennington from Route 7 in New York to Route 7 in Pownal at the race track location.

The entire Town of Pownal is rural with a population of approximately 3,500. The area has lost several of its larger employers over the last 10 or more years, including the 150± at The Tannery and

others at the former race track and General Cable plant. There has been no new major development in the Town during the 1990's.

Retail uses exist along Route 7, primarily north of the intersection with Route 346. Most of these retail outlets are tourist related, including motels, antique and craft stores, and other uses that cater to the large summer and winter tourist population that is attracted to this very attractive section of South Vermont.

Retail and service stores that serve the local population are in the Town of Bennington to the immediate north. These facilities include a wide range of service and retail stores in Downtown Bennington and supermarkets and discount department stores (Kmart, WalMart and Ames) to the immediate north of the downtown along Route 7A in Shaftsbury (Map B). These stores are approximately 6 to 8 miles from Pownal.

Fashion and comparison goods shopping is 45 minutes away in the Albany-Troy-Schenectady market area and to a lesser degree in northeast Massachusetts in Berkshire County.

The setting of the Town of Pownal is somewhat unique in Bennington County. It is on the south side of Bennington County, south of the Town of Bennington. The Town of Bennington is the County seat in terms of government and professional offices. It is a business center first and a tourist area second. All of the major business activity is within the Town of Bennington, or to the immediate north. Pownal has not shared in the growth and expansion of the Bennington area economy, due partly to its location away from the area's primary east-west highway, Route 9, its distance from the center of the Town of Bennington, and lack of available infrastructure in Pownal.

Bennington County is a large tourist destination area, as described later in the report. However, the County's primary tourist attractions are in the Manchester/Bromley area to the north, near the ski regions of South Vermont. Thus, in both cases, Pownal is not within the primary tourist centers of the County--ski areas in the greater Manchester area and cultural and government center in Bennington. Pownal shares in the region's Fall foliage attraction but has no other major tourist destination at present. The Town has one small motel.

These data indicate that the Town of Pownal is not currently sharing in the economic and tourist growth of the County. Proposed reuse of the Tannery site is therefore studied under these trends and conditions.

Williamstown/Berkshire County. Just to the south of Pownal is Williamstown, Massachusetts, a "pricey" community with Williams College; numerous "world class" tourist attractions, such as the Clark Art Institute, Tanglewood, Berkshire Summer Theatre, etc.; and a large and expanding health services base. It is an area that attracts commuters from Bennington County to the various employment centers in the greater Williamstown area, as for some industries, Pownal and Bennington County serve as a suburb of Williamstown.

Williamstown also provides hotel rooms for the Bennington County tourist when rooms are not available locally. According to economic development officials in Berkshire County, the only likely overlap between the economies of Bennington and Pownal that provide some benefits for Bennington County is that sector of the Williamstown tourist base that visits attractions in Bennington County. This is reported to be primarily outlet stores in Manchester and to a lesser extent the Bennington Museum.

The lack of facilities in Pownal excludes this community from benefiting from the resident and tourist markets in Williamstown.

Methodology

The original concept and contract for the Community Needs Assessment is for GPI to undertake a series of public meetings in order to solicit citizen input on community desires for the site. Public input is encouraged by EPA on how to redevelop the property and how the future reuse of the property can better serve the community. The input from the community is to be analyzed and organized into three alternative concept plans for the site. These plans are then to be market-tested in a Market Demand Analysis. Recommendations for reuse of the site is to follow.

Citizen input was analyzed by a survey of citizens of Pownal by GPI. The survey included recommendations for recreation, commercial, industrial and miscellaneous uses. The vast majority of the respondents selected recreation as the preferred uses for the Tannery property, including a wide range of passive recreation uses, boating and fishing, and other active uses. There was minimal public interest for commercial and industrial reuses, partly due to the fact that the majority of the site is wooded and very attractive for recreational uses. Public opinion was also influenced by a realistic assessment of past and current market trends in Pownal and the site's setting off the Town's primary highway.

Town officials report a desire to acquire the site for recreation based on public input. This is clearly the most immediate use given the current lack of public sewer and water at the site.

These conclusions create a need to slightly change the original study methodology, as there are no alternative commercial development proposals to study, based on input from Pownal's citizens. Thus, the Market Demand Analysis is not evaluating potential commercial uses proposed by the public, rather the market analysis to follow evaluates market support based on local commercial development trends and economic strength.

The market study results have also been influenced somewhat by the fact that the site currently has no public water and sewer. Current plans, however, indicate that wastewater would be available at the site by mid-2003, or 2± years after the Town is likely to acquire control of the property. Water could be made available on the west side of the river via a new well drilled as part of the site reuse.

Market Area. The market area defined for the Town of Pownal for the evaluation of past and current economic trends is the Bennington Region. The Bennington Region includes 14 towns in Bennington County, but excludes three small towns in the County that are located on the east side of the Green Mountain National Forest, including Readsboro, Searsburg, and Winhall. The Bennington Region (of Bennington County) is the geographic area that represents the market area within Bennington County when local officials analyze economic trends.

The Bennington Region is more a market area for the Town of Bennington than for the Town of Pownal, as Pownal is a small community in the County and does not compete with the towns north of the Town of Bennington for commercial, industrial, or tourist growth. However, this region represents the competitive market in the County and represents a defined geographic area in South Vermont that best defines local economic development and market potential.

The Albany area to the west is too far from Bennington County to impact the local economy. However, local residents do commute to work in the greater Albany area.

Berkshire County, Massachusetts to the immediate south, with the communities of Williamstown and Adams, has an active economic base with Williams College, Clark Art Institute and an expanding (but small) high tech job market. To date, this area has not generated economic development north to Pownal. However, this could occur in the future. It is not however part of Pownal's current market area. To the extent

that it can be in the future is discussed in the conclusion section of the report.

Section I Bennington Region Economic Trends

This section of the report presents the economic trends in the defined market area of the Bennington Region. The first part of Section I presents demographic and employment trends for the region. These data are based on United States Census data and data from the State of Vermont, both the Health Care Authority and the Department of Employment and Training.

The second part presents the economic development activity in the region, including tourist trends, industrial development trends and retail development trends. These are compared with demographic and employment data in Section II as part of the demand analysis for new development at the Tannery site.

Demographic Trends

Population Trends

As shown in Table 1, the current population estimate for the market area is 34,630. This figure is approximately 115 above the 1990 official census count indicating that the population of the Bennington Region has grown very slowly during the 1990's. The 2000 estimate will likely be above 35,000. 2000 data are not yet available from the Bureau of the Census, although 1999 data show a somewhat larger increase over the annual population increase during the 1990's.

Table 1 Population Trends by Town, Bennington Region, 1980-1998

Town	1980	1990	1998
Arlington	2,184	2,299	2,343
Bennington	15,815	16,451	16,069
Dorset	1,648	1,918	2,055
Glastenbury	3	7	9
Landgrove	121	134	142
Manchester	3,261	3,622	3,725
Peru	312	324	312
Pownal	3,269	3,485	3,530
Rupery -	605	654	669
Sandgate	234	278	264
Shaftsbury	3,001	3,368	3,472
Stamford	773	773	768
Sunderland	768	872	933
Woodford	314	331	338
Bennington Region	32,308	34,516	34,629

Source: 1980, and 1990 U.S. Census of Population and Housing; 1998 U.S. Census Population Estimates (7/1/98)

The region grew by 2,000 persons during the 1980's and by 4,000 persons during the 1970's. The trends over the past 20 years show a significant slowing of population growth in the market area--14.8 percent during the 1970's; 6.8 percent during the 1980's; and 0.3 percent during the 1990's. This change is the result of past employment losses in the area, as will be discussed below.

Data in Table 1 show that the Town of Bennington has approximately half of the County's population, but that the town lost population during the 1990's. Shaftsbury, a "suburb" of Bennington, and Manchester, a community that is attracting commercial and tourist growth, have realized modest growth. In general, all of the communities in the market area are not expanding to any degree.

Population in the State of Vermont increased by five percent during the 1990's. The state's population trends mirror Bennington County's in that the 1970's was a strong growth period and the rate of growth declined during the 1980's and 1990's.

Pownal. The population of Pownal is estimated at 3,500±. Census data show that Pownal's population increased by 45 during the 1990's, after a growth of over 200 during the 1980's and 800 during the 1970's.

Population Projections

Population projections for Bennington County (and Region) have been prepared by Vermont Health Care Authority in 1993. Projections that have been prepared appear high, as the 1995 estimate by that agency is above the 1998 census estimate.

The population count for 2000 is likely to be published by early-2001. It is expected that the 2000 population will be only slightly larger that the 1998 estimate shown in Table 1, as local officials report modest new home construction in each town, including the County's largest jurisdiction, the Town of Bennington.

There is no data that supports an increase in population growth over the next five or so years. A following analysis will show some employment growth in the County during the 1990's. This employment growth did not affect population growth.

Based on available data, the following is a rough estimate of the expected population forecast for the 2000 to 2010 period.

Population Forecast

	2000	2005	2010
Pownal	3,550	3,600	3,600
Bennington Town	16,100	16,150	16,150
Bennington Region	34,700	35,000	35,500

These projections show a stabilized population with very little expected growth.

Population By Age

Typically, rural areas such as Bennington County have a high percentage of seniors and this is the case in the market area. In 1990, nearly 15 percent of the population was over 65 years of age. This is well above the national average. Additionally, the senior population increased over the 1980's as a percent of total population; this trend is estimated for the 1990's.

It was the under 18 year old population that has declined in the Bennington Region, as presented in Table 2. There has been an absolute increase in persons over 18 years of age but a decrease in pre-school aged population.

Table 2 Population By Age, Bennington Region, 1980-1998

	1980	1990	1998
Total Population	**32,310**	**34,520**	**34,630**
Under 18	9,650	8,680	8,140
19-64	18,1430	20,710	21,120
Over 65	4,520	5,130	5,370
Percent of Total			
Under 18	29.9%	25.1%	23.5%
19-24	56.1%	60.0%	61.0%
Over 65	14.0%	14.9%	15.5%

Source: 1980 and 1990 U.S. Department of Commerce, Bureau of the Census; and RER Economic Consultants

Pownal. Pownal also realized a loss in school-aged population and an increase in seniors and persons in the 19 to 64 age category during the 1980's. In 1990, just under 10 percent of Pownal's population were seniors, a percentage that is closer to the national average.

Households

The Bennington Region has approximately 13,320 households, or occupied housing units. Household growth is estimated to have equaled 300 for the 1990's, or approximately 30 per year on average. This is consistent with reported housing unit construction in the Bennington Region, based on interviews with local officials.

A comparison of data in Table 3 with data in Table 1 show that the net household growth of the 1990's was significantly higher than population growth. This is due to the significant reduction in the average household size, as shown.

The reduction in household size from 2.80 in 1980 to 2.65 in 1990 and an estimated 2.60 in 2000 is due to a decrease in the number of

children per household and an increase in the senior population, as presented in Table 2.

Table 3 Household Trends and Projections, Bennington Region, 1980-2000

	1980	1990	2000
Total Population	32,310	34,520	34,630
Persons/Household	2.80	2.65	2.60
Households	11,540	13,030	13,320

Source: 1980 and 1990 U.S. Department of Commerce, Bureau of the Census; and RER Economic Consultants

Households represent the basis for new housing unit demand, as each household requires a new home. Data shown in Table 3 indicate that the demand for new home development is modest.

Households also represent the key spending unit for retail goods and services, as goods are purchased based on household income, not family size. The following analysis will show the trends in retail expenditure potential in the market area.

Housing Units. The Bennington Region has approximately 16,500 total housing units. Of these, approximately 10 percent are seasonal homes. There are approximately 3,400 vacant units as of 1990, which is a very high 23 percent for year round homes and 20 percent of total housing units. The number of vacant housing units more than doubled during the 1980's and likely have increased during the 1990's.

Retail Expenditure Potential

In spite of the modest population growth in the market area during the 1990's, there was a household growth of 300. There was also some increase in average household income, when income data are expressed in constant 1999 dollars. These data shown in Table 4 show significant increase in the market area's retail goods expenditure potential.

First, in constant 1999 dollar values, market area median household income increased by approximately seven percent in constant dollar values during the 1990's. Data in Table 4 show steady

increases in median household income over the past 20 years over and above the rate of inflation.

This has generated a significant increase in total household income for the region and a resulting increase in market area expenditure potential for food and general merchandise and services.

Data in Table 4 show that the U. S. Department of Commerce estimates that 16.3 percent of annual available household income is spent on food and beverages. This includes consumer spending at restaurants, which currently is approximately 40 percent of the total for this defined consumer category. The market area realized a significant $46 million increase in expenditure potential for food and beverage consumption. (Data are not available on percent changes in expenditure potential over time, partly due to shifts in component categories by the Department of Commerce. However, food and beverage consumption is a higher percentage of expenditure from the past and food consumption outside of the house is a growing segment of this consumer category.)

Table 4 Trends in Household Expenditure Potential, Bennington Region, 1980-2000 (constant 1999 dollars)

	1980	1990	2000
Households	11,540	13,030	13,320
Median Household Income	$30,980	$35,880	$38,500
Total Household Income, (000's)	$357,509	$467,516	$512,820
% for food & Beverage	16.3%	16.3%	16.3%
Food & Bev. Potential (000;s)	$58,275	$76,205	$83,590
% Goods & Services	14.1%	14.1%	14.1%
Goods & Services Potential, (000's)	$50,410	$65,920	$72,310

Source: U.S. Department of Commerce

Approximately 14.1 percent of available household income is spent on a wide range of goods and services, including household furnishings and appliances, apparel, and personal services. As with food and beverage expenditure potential, there has been significant growth in this sector of consumer expenditure potential.

These trends would suggest that market support has increased for retail and service space even with a small population increase. Further analysis will show that the Bennington area has realized one new large supermarket in 1994/95 and a second and third new supermarket for 2000 and 2001. Also WalMart opened in the early-1990's and increased the amount of "big box" department store space by over one-third. These new stores, and others in the downtown, are supported by an increase in expenditure potential rather than population and household increases.

Employment Trends

Data presented in the following paragraphs present trends in employment for Bennington County for the 1980 to 1998 period. Data are shown for at-place employment, i.e., the number of jobs that exist in the region and a breakdown of those jobs by major industrial category.

The state also provides labor force data, but defines labor force as all persons within the ages of 16 to 64 years of age. Labor force is more typically defined as those persons who are available for work, not just residents. It excludes residents who are not available for work due to age, capacity, desire, etc. Thus, no analysis is shown for labor force, which would show the number of persons available for jobs. Thus, labor force data are not available.

Trends in Employment

As of 1998, the Bennington Region had approximately 17,660 at-place jobs (employment). This is compared with a population of 34,630, indicating that a high ratio exists in jobs to population. Approximately 58 percent of these jobs (10,220) are in the Town of Bennington. Manchester has just under 4,400 jobs, or 25 percent of the County total. Data on Pownal show 265 jobs, which would be mainly tourist related retail and some industrial jobs at two large area warehouses.

Table 5	Trends in Employment by Town, Bennington Region, 1988-1998		
Town	**1988**	**1993**	**1998**
Arlington	689	712	1,065
Bennington	9,524	9,652	10,221
Dorset	666	498	591
Glastenbury	0	0	0
Landgrove	23	21	49
Manchester	3,619	3,601	4,381
Peru	203	192	232
Pownal	330	303	265
Rupert	46	53	68
Sandgate	N/A	N/A	N/A
Shaftsbury	596	472	566
Stamford	227	94	114
Sunderland	81	58	81
Woodford	13	19	25
Region Total	**16,017**	**15,675**	**17,658**

Source: U.S. Department of Commerce

Key data shown in Table 5 are the increase in jobs since 1993. The region lost employment over the 1988 to 1993 period; this was the major recession period of the early-1990's throughout the entire nation. However, over the four years between 1993 to 1998, the region realized an increase in nearly 2,000 new jobs and some additional increases occurred since 1998. Current regional employment is 1,600 more than in the late-1980's.

Pownal has not shared in the region's job growth. Pownal lost jobs during the 1988 to 1993 period and also since 1993. In fact, the Town of Pownal is the only town within the Bennington Region that has realized a loss in total jobs since 1993.

The Town of Bennington gained nearly 500 jobs over the 1993 to 1998 period. Manchester also realized an increase in jobs since 1993, as did Shaftsbury and Arlington, two communities near Bennington in the center of the County.

Data in Table 6 identify much of the net job growth during the 1990's by company. These data show that 1,500± new jobs were generated by the growth of three manufacturing companies and four retail stores,

plus, numerous small retail stores in the downtown. Of the 1,500 new jobs shown in Table 6, 700± were in retail and 800± were in manufacturing. Net job growth for the 1990's was 1,220, as Johnson Control reduced jobs by 300.

Two points are shown by the data in Table 6:

1. Most of the County's job growth was primarily in two categories--retail and manufacturing; and

2. The job growth that occurred had little impact on population growth.

Trends at these companies are fully explained in the next subsection.

Table 6 Net Job Growth at Major Facilities Bennington County, 1990-1999

New Jobs	Total Jobs 1/
NASTECH	500
Mack Molding	250
Abacus Automation	40
WalMart	80
Hannaford Supermarket	230
Manchester Retail Space (New)	200
Equinox Hotel	120
Downtown Bennington	100
(Subtotal)	(1,520)
Job Loss	
Johnson Control	300
Net Gain	**1,220**

Note: 1/ Estimate and rounded

Source: RER Economic Consultants Field Survey

For the post-2000 period, a new supermarket has opened and will add 300± new jobs. Countering that is the announced closing of the Stanley Tool Plant and the loss of 160 jobs. Thus, there are no

identified trends after 2000 that would indicate any changes to population trends.

However, the large increase in retail jobs often allows a second wage earner in households. This does not always generate population or household increases but does add significantly to household income. These are part of the reasons for the trends in average household income growth presented in Table 4.

Bennington County shows a net gain in employment over the 1990's. Of the 1,200+ new jobs, 700+ are in the retail sector. Most of the job growth in the County has been in hourly wage jobs. Nearly 60 percent are in the lower wage retail sector.

Employment By Industry

Data in Table 7 show employment by industry for 1980 and 1990 which are not fully consistent with the data on total employment shown in Table 5. The inconsistency is due in part to different data sources. However, the totals of employment are similar, indicating that trend data and distribution of employment by industry will represent consistent trends.

Retail trade has the largest number of jobs, at nearly 3,500 (20 percent of total) and is the fastest growing sector of the economy. Retail trade and personal services are jobs related to the area's large tourist industry and are expected to be large and growing sectors of the economy.

Manufacturing jobs declined by over 30 percent during the 1980's and is now below Retail Trade as the largest employment sector. This decline is likely to be reversed somewhat by 2000 based on data presented in Table 6. Construction jobs grew, as did jobs in all other categories. Only manufacturing jobs declined locally during the 1980's. Professional and service related jobs increased over the 1980's.

Table 7 Employment by Industry, Bennington County, 1980 and 1990

	1980	1990
Agriculture 1/	385	500
Manufacturing	4,684	3,081
Construction	926	1,540
Transportation	342	360
Comm. And Utilities	200	195
Wholesale Trade	280	327
Retail Trade	2,815	3,489
Fire 2/	501	841
Business and Repair	447	645
Personal, Services	812	1,015
Health	1,241	1,554
Education	1,509	1,929
Other Prof.	521	1,133
Public Admin.	337	386
Total	15,000	16,995

Notes: 1/ Includes Forestry, Fish and Mining
2/ Finance, Insurance and Real Estate

Source: U.S. Census 1980, 1990 STF3

Regional Development Trends

Three sectors of the area economy, including industrial, retail and tourism, are presented in the following paragraphs. These are the primary local economic factors that generally describe the development activity in the Bennington Region. Analysis of data for each sector serve as the basis for evaluating the data provided by state and federal reports on local population and employment.

Retail space development is described and includes trends in Downtown Bennington, new construction outside of the downtown that serves the greater Bennington area and retail space development in Manchester. The analysis will show considerable activity in the

expansion of retail space over the 1990's in spite of the area's very small population increases.

Tourism data is also presented and tourist visitation is shown to be a major factor in market support for new retail space.

Data in Table 5 show a growth of 2000± new jobs over the 1990's. Much of this is in the retail trade sector. Some is for job growth at area companies. However, the following analysis will show that industrial park development was nearly stagnant during the 1990's and that few new companies moved into the region during the 1990's. Industrial or manufacturing job growth was at large manufacturing companies and not from new companies moving into the region.

Retail Space Development Trends

Downtown Bennington. Downtown Bennington contains the largest concentration of retail space in the County, with approximately 522,000 square feet of first floor space and another 250,000 square feet of upper floor space (excluding government space). The downtown has a wide variety of specialty fashion and service retail space, including apparel, jewelry, gift, appliance and hobby stores. These are contained in a total of 159 street level stores.

Of the downtown stores, 16 are restaurants, with eight restaurant/bars, seven fast food facilities and one wine/liquor store. There are numerous banks, travel agencies and beauty/barber salons. The downtown is also the location of most professional offices.

Aside from the attractiveness of this historic "main street" retail core, the downtown is very active and thriving. It now has almost full occupancy of first floor space along Main Street, with the majority of the vacant space located along the side streets. Vacancy in the downtown was reduced in half over the past three years due to the occupancy of 50,000 square feet.

There were 16 new businesses located in the downtown since 1998 and six that expanded. (At the same time seven businesses closed.) New businesses included gift shops, art galleries, and other specialty stores. Most of the new retail outlets are upper end stores with a market orientation towards visitors to the region.

The Better Bennington Corporation has taken an active role in successfully promoting the downtown, which follows in part the national Main Street Program, a program to upgrade historic downtown areas. There has also been considerable public investment in street scape

improvements along Main Street that have, coupled with improved marketing and professional management, attained the desired results of an improved business environment. The new retail space in the downtown has generated approximately 100 new jobs over the past few years.

Bennington Area. While all of the vacant first floor retail space has been greatly reduced in the downtown, considerable vacant retail space exists to the north of the downtown in the retail centers built in the 1970's along the Route 7 bypass.

At present, several shopping plazas exist along the Route 7 bypass with Kmart, WalMart, Ames and Staples as the largest anchor stores. This area also has three existing grocery stores--Grand Union, Price Chopper, and Hannaford. Hannaford opened a 45,000 square foot unit in 1994/95.

At present, Price Chopper has a new 58,000 square foot store that opened in Fall, 2000 behind WalMart. Approximately 300 employees are likely to work at the new store, although this is not all net, as the company will close its existing store after its lease expires. In addition, another grocery store, Aldi, a discount operation, is planning to add a 15,000 square foot new store within the next year or so, as the company has applied for and received permits for the store.

These data indicate an increase of 103,000 square feet of grocery store space within the past six years. In spite of the area's very modest population growth, the Bennington area realized the expansion from 30,000± square feet of grocery store space prior to 1995 to 133,000 in 2001. Clearly some of this expansion is the result of a pent-up demand for new quality that existed when only two small retail outlets existed prior to 1995. The expansions of Price Chopper by 43,000 square feet is another indication of a current unmet demand, as this company would certainly understand the market.

While the growth and plans for total space appears generous compared with population trends, three points are shown by these development trends:

1. That new retail space is being built on the north side of Bennington and away from Pownal

2. That new retail space in the area is convenience related (food) space or specialty space, as in the case of the new downtown stores, and not comparative shopping space, such as other big box stores--WalMart was the last to open in 1993; and

3. The new retail space that is being built along the bypass is not competing with downtown space, as evidenced by the evolving trends in the downtown and the different type of space that is being built.

The current trend of retail space being attracted to the north side of Bennington, rather than the south side towards Pownal, is likely to continue. The state has a new bypass under construction that will make travel to the north side of Bennington easier.

At present, the first phase of the new highway (Route 9) is under construction. This is a bypass from the New York/Vermont state line, where New York Route 7 and Vermont Route 9 intersect. The Route 9 bypass will extend to the north and into Route 7 in Vermont about 0.75 miles north of K Mart. This phase is scheduled for completion within two years.

This bypass will be extended east connecting with VT 9 from Route 7 to the east side of downtown Bennington; this segment is expected to be started by 2003/04. There may be a third phase constructed, which will extend the bypass south to Route 7 south of downtown Bennington near Carpenter Hill and thus will create a "beltway" around Downtown Bennington and the urban core of the town. This last phase, which could provide a positive impact for Pownal, is not currently scheduled for construction.

Manchester. The Village of Manchester has also realized considerable new retail space development during the 1990's, generated in part by the new investment at the large, historic Equinox Hotel. The historic 133-room hotel was purchased in 1990 by its current owners and fully renovated in 1991/92. The adjacent golf course was upgraded and in 1995 the hotel owners rebuilt the 14-room Orvis Inn. In all, the current owners of the Equinox invested over $14.0 million for the hotel and golf course renovation, a new spa and ballroom. The reopening of the hotel generated 125± new jobs at this location.

Also since the late-1980's and early-1990's, the Village of Manchester has become a haven for retail outlet stores. Approximately 300,000 square feet of outlet stores have located here, both in historic and new buildings, with 72,000 square feet built during the 1990's. These outlets serve the very large tourist market in this part of the County, generated from the adjacent ski areas of Bromley and Stratton and from the vast array of natural amenities in this rustic, natural setting. This area is the home of the Vermont Symphony, the Southern Vermont Arts Center (which was enlarged with a $7.0 million investment), several golf courses, a large skating rink, and outdoor

sports, such as off road driving, fishing, horseback riding, snowboarding, falconry, and cross country skiing.

The Village of Manchester has considerable cultural and natural facilities that are generating growth. It is a separate submarket within the County and adds to the uniqueness and diversity of Bennington County.

Tourism

Manchester generates considerable tourism due to the ski and outdoor recreational facilities of this part of Bennington County and the adjacent Windham County.

The Bennington area is also a tourist center with its primary attraction the research of history that dates to the Revolutionary War. This is a totally separate tourist submarket area within the County which generates a different type of visitor compared with those who visit the attractions in the Village of Manchester.

The Bennington Area. The Bennington area contains approximately 533 motel and bed and breakfast rooms, plus 173 campsites. It is an area that markets historic sites and events, as well as Fall foliage, craft fairs and special events. The Bennington area is not competitive for the region's ski season and attracts only a small overflow market during busy ski days. This is not a year round tourist destination, as only the Summer and Fall seasons are active tourist periods. Local officials estimate that motel/bed and breakfast occupancy averages 40 percent for the year, as low occupancy occurs during the Winter and Spring.

Local officials are attempting to increase tourism with a number of special events, including:

- Antique and Classic Car show - September
- Bennington Battle Days- August
- Mayfest Craft Show- May
- Art shows- Summer
- Summer Music Events- Summer
- Farmers Markets- Summer
- Craft Fairs- October and November
- Maple Sugar Day- March
- Ethan Allen Day-June

There is also local theatre from mid-July through mid-September.

In spite of improved marketing and an increase in event days, local merchants report stabilized visitation but increases in sales. The one area where improved sales are evident is the new craft and gift stores in Downtown Bennington.

The Bennington area has numerous antique and craft stores. Interviews with several larger local merchants indicate a stable but "cautious" market, partially given the seasonability of the region with patronage limited to two seasons of the year.

Manchester Area. This area includes the Bromley and Stratton ski areas and the Arlington area of Bennington County with its famous Norman Rockwell Gallery. There are approximately 2,000 motel rooms in this submarket, four times the number in the south part of the County. These are likely to generate 55 percent annual occupancy, according to local officials.

While no visitor patronage figure exists, a 55 percent occupancy rate, with an estimated 2.25 persons per room would generate over 900,000 visitors to the region for overnight stays. Day visitors could add an estimated 450,000 to this total, indicating that the Manchester area generates well over 1.3 million visitors per year--between 2.5 to 3.0 million visitor days when the length of stay or 2.5 days is calculated.

This total is four times larger than Bennington's visitation total, which would place visitation in the Bennington area at 500,000 to 600,000 annually. Manchester has more hotel rooms, a longer season (including Winter), more natural outdoor activities, and a large outlet store market that attracts tourists. The Manchester area is 20± miles north of Pownal.

Trends in Tourism

The Vermont Department of Taxes report key indicators of trends in taxable receipts for hotel rooms, meals and alcohol purchases for the fiscal years 1995 to 1998. These represent the most reliable data for determining trends in visitation. Data for Bennington County show a 7.7 percent increase for the four-year period where data are available. Eliminating inflation for this period would indicate a stable but slow growth market.

State data on year-round occupancy rates for all lodging facilities in the County show a significant increase from 1998 to 1999

of 40.3 percent to 46.3 percent. These data indicate that occupancy data provided by local Chamber of Commerce officials are close to being accurate. State data also show that Bennington County's annual lodging occupancy rates are 5.0 percent higher than the state average in 1999 (and 0.5 percent higher in 1998.) Occupancy data for 2000 should be about the same as in 1999.

Industrial Development Trends

The industrial market in Bennington County is somewhat unique. Employment data trends show an increase in industrial and service jobs during the 1990's. However, the following paragraphs will show that these job increases were almost exclusively in large plant expansions, as the County's industrial park market was stagnant over the past decade. The County did realize job growth from local expansion, as no new companies entered the County.

Industrial Plant Expansion. The following paragraphs describe the companies that generated the primary job growth that occurred during the past decade. In addition to large job increases in the retail sector, three local industries realized significant increases in new jobs during the 1990's, as presented in the following paragraphs.

- NASTECH is a local company that manufactures steering columns for golf carts for use in North America. The company started in 1989/90 from "scratch". It now has 500 employees, with all of this job growth occurring in the 1990's. NASTECH is located in Bennigton near Shields Drive.

- Mack Molding in Arlington is a plastic molding manufacturer for the electronic industry. This is a mature company with two plants in Arlington and a warehouse in Pownal. The company added 250 new jobs during the 1990's.

- Abacus Automation is a Bennington company that expanded from an 8,000 square foot building to 40,000 square feet. The company has grown over the years from a start-up company located in a garage to incubator space and presently into a large manufacturing facility. This expansion added 40 new jobs.

- Orvis Company opened a new corporate headquarters in Sunderland in the late-1990's which was a consolidation of office related jobs from numerous locations in Manchester. It is reported that this relocation generated only a few new jobs.

These four expansions added 800± new jobs to the County over the past 10 years. Along with these increases was the 300 job loss at Bennington's Johnson Control Plant.

Industrial Parks. Bennington County has three small industrial parks. These have been relatively inactive during the 1990's, as described in the following paragraphs.

- Morse Industrial Park. This is the primary industrial Park in Bennington County which is privately owned by the William Morse Trust. The park has a total of approximately 35 to 40 acres, with 20 or so acres still available for development. All utilities serve the property. There are also 10 acres of adjacent property that represent expansion potential for the park..

  The park opened in the late-70's or early-80's and currently has five businesses, most heavy industrial companies. The most recent transaction was the 1999 sale of a 50,000 square foot vacant building that was purchased by a local company (J.G. Temple). Another recent transaction in the park was in the early-1990's when Bennington Iron Works expanded by 20,000 square feet on their own property. There were no land sales or new site developments at this park during the 1990's.

- Bowen Road Industrial Park is an industrial zoned area with no common ownership. The area was originally developed in the late-1960's or early-1970's and contains approximately 60 acres. There has been no recent development activity at this area which contains six businesses. The Jard Property has been vacant since the 1980's, but is a brownfield site with PCB's in the building and problems with land ownership. There is a 38,000 square foot building in the area that is for sale but occupied on an annual lease basis. This has also been an inactive industrial area during the 1990's.

- Shields Drive is a 45±-acre property owned and developed by Bennington County Industrial Corporation (BCIC). All infrastructure is available to the property that was developed in the 1970's. There are three businesses located here, with the last parcel of five acres sold to Abacus Automotion in 1998. Abacus Automotion was a local company that expanded to this location from 8,000 square feet in an incubator building to 40,000 square feet.

The approximate 45-acres that comprise the Shields Drive Industrial Park is in addition to the large NASTECH property that located adjacent to the park in 1989/90 and constructed a large manufacturing building at that location.

Section II Conclusions and Recommendations

The purpose of the market study is to determine the reuse potential for the Tannery site. Conclusions and recommendations for the site are presented in this last section of the report based on the detailed market data described and analyzed in Section I.

Market Findings

Summary of Bennington County Economic Trends

The County had a modest population growth of 0.3 percent over the 1990's, yet at-place employment (jobs in the County) grew by 2000 during the 1990's, or 13 percent. Half of the job growth was at three local manufacturing firms, while most of the remainder was at new retail stores.

Data on population and employment are state and federal data. There appears to be some inconsistency with these data, as job growth would typically generate population growth, particularly when the County's unemployment rate is low--5.5 percent in 1990 and 3.7 percent in 1998.

The drop in the unemployment rate accounted for 300 new jobs. Much of the hourly retail jobs can be accounted for by persons previously not in the work force now being employed. Thus, this would provide two-worker families rather than one wage earner, and thus be one reason for the significant net gain in average household income. Bennington County must also be attracting employees who reside outside of the County for some of the manufacturing jobs.

Future employment gains would probably generate some population increase. At present, the two new job-generating companies are retail stores--Price Chopper's current (post-2000) expansion and Aldi's proposal for a small grocery store. Somewhat offsetting these new jobs is the recent announced planned closing of the Stanley Tool plant and the resulting loss of 160 manufacturing jobs at that location.

The tourist market is very strong in Bennington County, but is primarily contained in the north part of the County in Manchester, and includes adjacent ski areas that extend outside of the County into Windham. Data show that the County probably attracts nearly 2.0 million tourist visitors annually, including day-trippers and overnight visitors. At 2.25 days per stay for overnight visitors, total tourist visitor days in the County would exceed 3.0 million. This market is stable but presently growing very slowly according to local officials.

Seventy-five percent of total tourist visitors are attracted to locations in the north end of the County. More importantly, local officials report that visitation is not growing, and in fact, may have declined slightly in 2000. However, tourism is a stable part of the Bennington County economy (hotel occupancy increased significantly from 1998 to 1999) and will remain so given the natural facilities that exist and the local events that generate tourist visits.

Tourism supports a considerable number of retail outlets throughout the County. However, in the Bennington area, the season is only Summer and Fall and most retailers do not report a strong or growing market.

These data suggest a stable but very slow growth economy in Bennington County. Manufacturing, retail trade, and tourism will remain as the primary economic factors in the County.

In spite of available industrial land, there has been no evidence that new companies are likely to move into the County under present conditions and based on data from local officials. One reason is the lack of quality local industrial parks. A second is that these existing parks are located north of the Town of Bennington and are targeted to local companies not new companies to the region. Also, with the expansion of Price Chopper and the expected addition of Aldi's, this sector of the retail market appears satisfied for the foreseeable future.

This comment can also be true for downtown retail space, as first floor space along Main Street is now full and the downtown has few quality storefronts available. Population growth does not support any new big box stores, with the market area already containing Kmart, WalMart and Ames.

In general, the best option for economic expansion in Bennington County is tourism. A second option is the provision for future industrial growth. The investment in the Equinox Hotel and golf course, and expansion of quality outlets in Manchester Village, are examples of developments that have had positive impacts on the local economy. There are other possibilities, as will be discussed below.

Economic Trends in Pownal

Pownal has not realized much economic growth over the 1990's. Employment decreased during that period. No new companies located there and the primary development site, Green Mountain RaceTrack, has

had no realized interest from the development community, although several attempts to revitalize horseracing were made. General Cable did add 10 to 15 new jobs.

There are several reasons for Pownal's past limited growth trends. One is a general lack of public water and no public sewer throughout the Town. A second issue is a lack of well located land for development. But most importantly, the 1990's was a slow growth period for the region and Pownal was not the prime location for the growth that was realized.

Pownal attracts some tourist visitors, as part of the Bennington area market, but these are related to the Fall foliage season. Pownal has one motel along Route 7, The Ladd Brook Inn, and a few antique and craft stores--Century Barn Antique Center, Pownal View Barn and Hillside House (furniture), Pottery Place, and the Moccasin Store. These are marketed through the Bennington Chamber of Commerce.

The Century Barn and Antique Center is a 6,500 square foot building that opened in August, 1998 as an antique center which leases space to antique venders. At present, there are 40 or so vendors that occupy 70 percent of the space at the center. This building was formerly a gift shop that closed when the owner retired. Vendors come from a wide geographic region to display antiques and crafts but do not stay in Pownal for any extended time. The owner expects all space to be leased by next year.

The region has a considerable number of antique and craft stores. The success of the Century Barn is impressive in light of existing competition. Our research found no other antique/craft centers that expanded recently, but this is clearly a strong and stable sector of the market.

Generally, Pownal's location at the extreme south end of the County places it away from most of the economic activity in the Bennington Region. The Williamstown Region in Berkshire County, Massachusetts has not yet generated any impact on the Town of Pownal in spite of that County having an active and growing economy.

Tannery Site Recommendations

The potential commercial site is 1.2 acres, including the warehouse. Of this, the warehouse portion has approximately 20,000 square feet. The parking area has approximately 33,000 square feet of land area. None of the site is served by public water and sewer at present. A proposed Wastewater Treatment Facility is scheduled to be

operational in the Fall, 2003 which will provide wastewater service to the site. Water can be supplied by constructing a drilled well.

The remainder of the site is planned for public recreation with fishing, boating, hiking, and other outdoor activities. These will take two or so years to open up. If successful, this should generate some tourist activity.

The warehouse is under a short time lease at a very low rate. Reuse potential of the site is predicted on the Town of Pownal taking ownership of the property. The site size, current lack of utilities, location and market trends do not support any private development. The timetable for providing public water and sewer service is 2003. This service is also needed for other properties in the town.

The market for new commercial development in Pownal is not strong. For any commercial market that may exist, The Tannery site is not the best location. A Route 7 setting is far more marketable.

Thus, recommendations for The Tannery site are as follows:

1. The proposed investment for a large outdoor recreation facility is a good one and would be an attractive addition to the Bennington area tourist/visitation draw, not a duplication. If well done and expansive, this could be a major draw for visitors. The Bennington Area Chamber of Commerce would welcome a new visitor draw.

   Canoe/Kayak rentals, fishing gear rentals, etc could generate some revenue for the Town if small fees are charged to non-residents of Pownal.

2. The warehouse does not represent a compatible use in the future. The warehouse could remain leased until the recreation area is open and then removed. However, this building could bring $20,000+ per year in revenue for the Town if owned by the Town. An alternative option is to increase rent slightly as there are no other buildings locally that can be leased at this low rent, and keep the building in place as long as it is leased.

3. The parking area of 33,000± square feet has potential for commercial development.

There are no private sector operations that appear practical for the subject property, given the problems with the site--size and location. Public investment would be risky given available retail and industrial properties in other parts of the Bennington area. The primary opportunity would be to build upon the expected investment at the property for recreation use and expected visitor attraction.

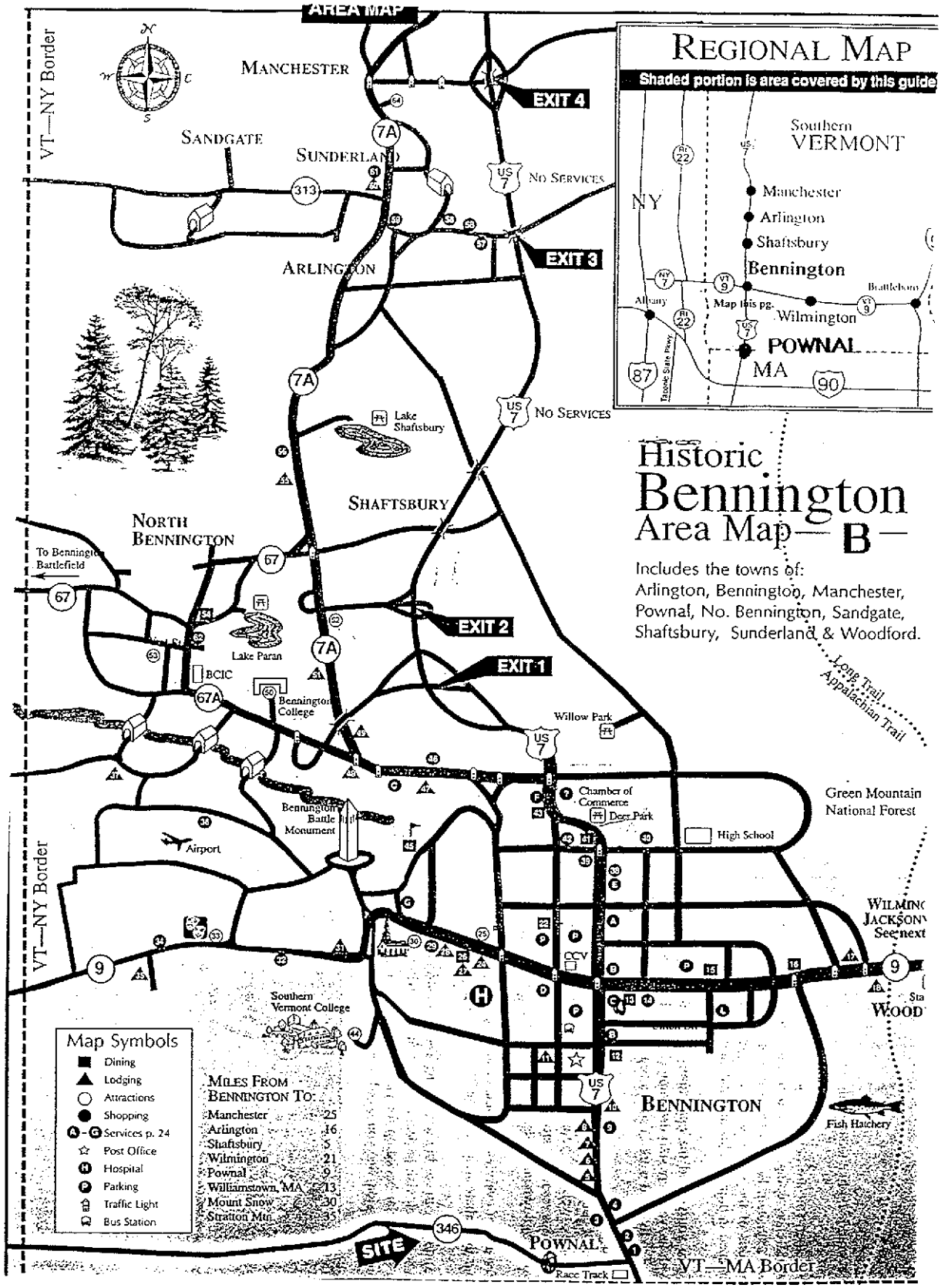
Other Issues. Town Officials might want to consider purchasing the former racetrack property of 149 acres, and with state financial support, develop and industrial park at this location. The site has a large existing building and 100± acres of flat land that will be served with public water and sewer in the near future.

The site is near the Massachusetts border and thus close to Willimastown.. That area has a large and expanding manufacturing market and limited land to expand a t present. While new sites are being proposed for development, the racetrack property in Pownal will provide an attractive alternative for Williamstown area companies that require expansion space at a more modest rental rate and land price than can be found in Massachusetts.

[Pownal.Rpt]

APPENDIX D

EPA SUPERFUND CLEANUP INFORMATION


AREA MAP
VT—NY Border
MANCHESTER
SANDGATE
SUNDERLAND
ARLINGTON
SHAFTSBURY
NORTH BENNINGTON
To Bennington Battlefield
EXIT 4
EXIT 3
EXIT 2
EXIT 1
No Services
No Services
Lake Shaftsbury
Lake Paran
BCIC
Bennington College
Bennington Battle Monument
Airport
Willow Park
Chamber of Commerce
Deer Park
High School
Green Mountain National Forest
Southern Vermont College
BENNINGTON
Fish Hatchery
POWNAL
Race Track
VT—MA Border
SITE
Long Trail
Appalachian Trail
Map Symbols
Dining
Lodging
Attractions
Shopping
A - G Services p. 24
Post Office
Hospital
Parking
Traffic Light
Bus Station
Miles From Bennington To:
Manchester 25
Arlington 16
Shaftsbury 5
Wilmington 21
Pownal 9
Williamstown, MA 13
Mount Snow 30
Stratton Mtn 35
REGIONAL MAP
Shaded portion is area covered by this guide
Southern VERMONT
NY
Manchester
Arlington
Shaftsbury
Bennington
Wilmington
POWNAL
MA
Albany
Map this pg.
Historic
Bennington
Area Map — B —
Includes the towns of:
Arlington, Bennington, Manchester, Pownal, No. Bennington, Sandgate, Shaftsbury, Sunderland & Woodford.

RER

EPA Completes Landfill Cap Construction and Other Cleanup Activities at the Pownal Tannery Superfund Site

U.S. Environmental Protection Agency (EPA)
Community Update #6
January 2001

Pownal Tannery
N. Pownal, VT

Overview

EPA is cleaning up the Pownal Tannery located on Route 346 in N. Pownal. EPA is conducting this cleanup effort in cooperation with the Vermont Agency of Natural Resources (VT ANR).

The cleanup is being addressed in two phases. The first phase was to remove the contaminated tannery building materials and soil, and to place a final cap over a landfill used by the tannery. While the first phase has been fundamentally completed, the second phase will take place over the following two years beginning with the comprehensive environmental testing of the remaining portions of the site that were affected by tannery operations. This investigation is currently underway and is expected to be completed in in the spring of 2001.

Activities Completed to Date

As of December 2000, all tannery buildings on-site were decontaminated and demolished. Demolished building debris was segregated and either recycled or disposed of off-site. Wood beams segregated from the building were cleaned and donated to the town of Pownal for use in a future recycling facility and equipment shed. Excavated soils and sludge from beneath tannery buildings and along the Hoosic River were disposed of at the tannery landfill or at off-site licensed disposal facilities. Buried sludge pipes which connected the tannery building to the lagoon area were excavated and disposed off-site. Multiple underground oil and waste tanks were excavated, cleaned and also disposed off-site.

The site of the former tannery building was re-graded using clean fill material and was partially vegetated. Protective handrails and guardrails were erected in areas that might pose a danger to accidental falling. A locked wood framed enclosure was built around the hydroelectric equipment near the dam. This equipment was exposed when the tannery building was demolished. An historic plaque was erected at the entrance to the former tannery building to commemorate the historic nature of the old mill and tannery building.

Contaminated soil and debris in the drains beneath the tannery warehouse building were excavated and disposed of off-site at a licensed facility.

At the landfill, construction of a new multi-layer cap was completed in November 2000. This cap and newly installed leachate collection system will prevent further discharge of contaminants to the groundwater and adjacent wetlands. The cap was seeded with grass to germinate in the spring. In addition, an access road and a new fence were built around the landfill.

Current and Future Activities

Efforts to vacuum and steam clean the interior floors and walls of the former tannery warehouse building, to reduce the levels of residual contamination on these surfaces, is scheduled to begin in January 2001. Additionally, repairs to the restored slope along the Hoosic River, in response to a flooding event in December 2000, will be completed in January 2001. These repairs will consist of minor regrading and placement of stones along the slope to reduce the potential for future erosion. This area will be planted with native plants in the Spring of 2001.

Future activities to maintain the building and cap areas (leachate collection/disposal, mowing, fence repairs) will be addressed by the VT DEC and the town of Pownal.

In year 2000, EPA's investigation to assess the remaining contaminated media at the site included: collection and analysis of soil/sludge samples from the lagoons and surrounding areas; a geophysical survey to identify buried objects in the lagoon; installation and sampling of groundwater monitoring wells; a residential water sampling program; collection of surface water and sediment samples from the Hoosic River; and a wetlands and wildlife survey. Using the Information collected above, a human health and ecological risk assessment is being developed to assess the potential

hazards posed by the site, as well as to identify additional cleanup measures. A Feasibility Study to identify and evaluate a range of alternatives to address potential site risks to human health and the environment is scheduled to begin in January 2001. Both the site investigation and the FS will be released for public review by June 2001. These documents will be released concurrently with EPA's preferred cleanup alternative, in a document called a Proposed Plan. This document will also be available for review and public comment prior to a final cleanup decision, which is scheduled for September 2001. Cleanup activities are anticipated to begin in 2002.

Questions about the Tannery cleanup, contact EPA's Boston Office or use EPA's toll-free number, 1-888-372-7341

Leslie McVickar, EPA
617/918-1374

Sarah White, EPA
(617) 918-1054

Vermont ANR
Brian Woods
(802) 241-3885

Where to find out more ...

To help you understand the cleanup plan for the site, technical and public information publications prepared to date for the site are available at these Pownal Tannery site information repositories:

Solomon Wright
Public Library
Pownal, Vermont 05261
(802) 823-5400
Hours: Open daily during the week. Call ahead for schedule.

EPA Records Center
90 Canal Street
Boston, MA 02114
(617) 573-5729
Hours: 10:00 am-noon and 2:00 pm-5:00 pm

Internet users may access general Superfund information on EPA's Superfund web page at: http://www.epa.gov/superfund

APPENDIX E

LETTER ON PROJECT UNDERSTANDING

TOWN OF POWNAL

P.O. Box 411, Pownal, VT 05261
Town Clerk: 823-7757 • Selectmen: 823-0132 • Fax: 823-0116

November 17, 2000

Ms. Leslie McVickar, Project Officer
USEPA
1 Congress Street
Number 1100, HBT
Boston, MA 02114-2023

RE: Pownal Tannery Reuse Assessment Report – Project Understanding

Dear Leslie:

This letter confirms the understanding reached at the October 18, 2000 coordination meeting with the FA&A, EPA and the Town of Pownal. As discussed at that meeting, the Reuse Assessment Report is a pilot and as such, EPA has considerable latitude to modify the project scope to suit the particular project situation. Because the completion date for the clean-up designs for the lagoon site and the warehouse site is well beyond the date to complete the Reuse Assessment Report, it is agreed that the reuse grant award scope requirements can be modified as necessary. The Town agrees with EPA that there is no need to re-write the agreement terms, provided there is a clear understanding on what deliverables are to be included in the Reuse Assessment Report. To that end, we have attached a working draft copy of the Table of Contents for the Reuse Assessment Report. This draft Table of Contents serves as an outline for the Report we are scheduled to deliver next March. As part of your review process, please confirm that you agree to the Report content as outlined in the draft Table of Contents.

Again, this is a pilot program and as such additional scope changes may be required as we progress with the Reuse Assessment and as EPA's cleanup evolves. We continue to appreciate the flexibility you have provided in allowing the scope to be tailored to meet the project needs. Currently identified scope changes and/or clarifications are described below.

General

- It is understood that the reuse construction cost estimates for the lagoon and warehouse sites will be very approximate and not suitable for selecting a reuse alternative. Once the EPA cleanup actions have been designed and are implemented for the lagoon and warehouse sites, more precise cost estimates for reuse alternatives will be possible. Part II of the reuse work will include getting detailed Total Project Cost Estimates, and selecting reuses for the lagoon and warehouse sites based on available construction funds, permitting requirements and other factors that apply to the sites as they exist post clean-up. The implementation plans will then be developed for the selected reuses. However, it should be noted that a source of funding for part II of the reuse work has not been identified.

- The final reuse alternative evaluation and selection process is outside the scope of this Reuse Assessment Report, and will need to be part of a separate follow-up study.

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- Where appropriate, we shall estimate first year expenses and income for reuse alternatives.

- Construction costs shall not include the EPA cleanup costs.

Lagoon Site

- For the lagoon site, we shall present two recreational reuse alternatives. The first alternative assumes filling of lagoons 1 and portions of lagoon 4 as a result of the EPA cleanup action. The second reuse alternative assumes that the EPA fills lagoon 1 and lagoon 4 is left as a hiking area.

- For the Reuse Assessment Report, it is assumed that lagoon 2 and portions of lagoon 1 (as shown on Figure No. 32, copied to you at the October 18 meeting) shall be used by the proposed WWTF.

- The proposed WWTF is a completely separate project from the reuse project. We will however, be working closely with the EPA to work towards a mutually acceptable construction schedule for both the lagoon site cleanup and the WWTF construction.

Warehouse Site

- For the warehouse site, we shall present two commercial reuse alternatives. The first alternative assumes the cleanup action leaves behind the existing warehouse building. The second alternative assumes the cleanup action removes all existing structures, and a new structure is built as part of the reuse alternative.

Former Tannery Building Site

- For the former tannery building site, we shall present the most popular recreational reuse.

- For this site we shall prepare the Total Project Cost estimate for implementing the recommended reuse.

We appreciate your ongoing efforts to clean up the former tannery site, and are confident we shall create a reuse that will have widespread appeal and use.

Sincerely,

Town of Pownal

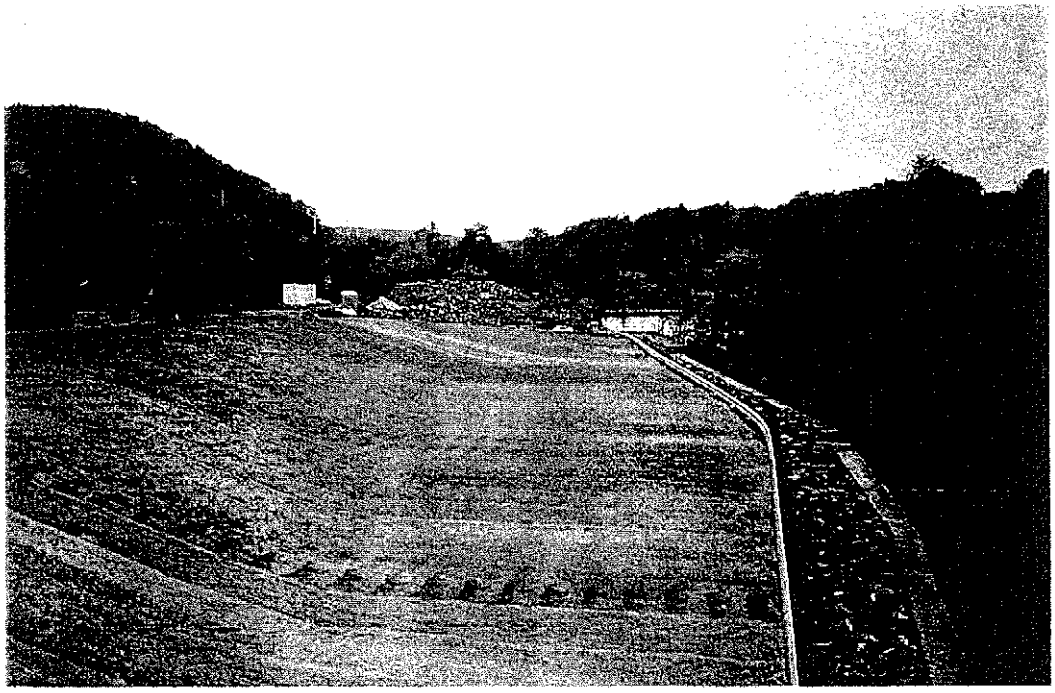
Nelson Brownell, Chairman
Board of Selectmen

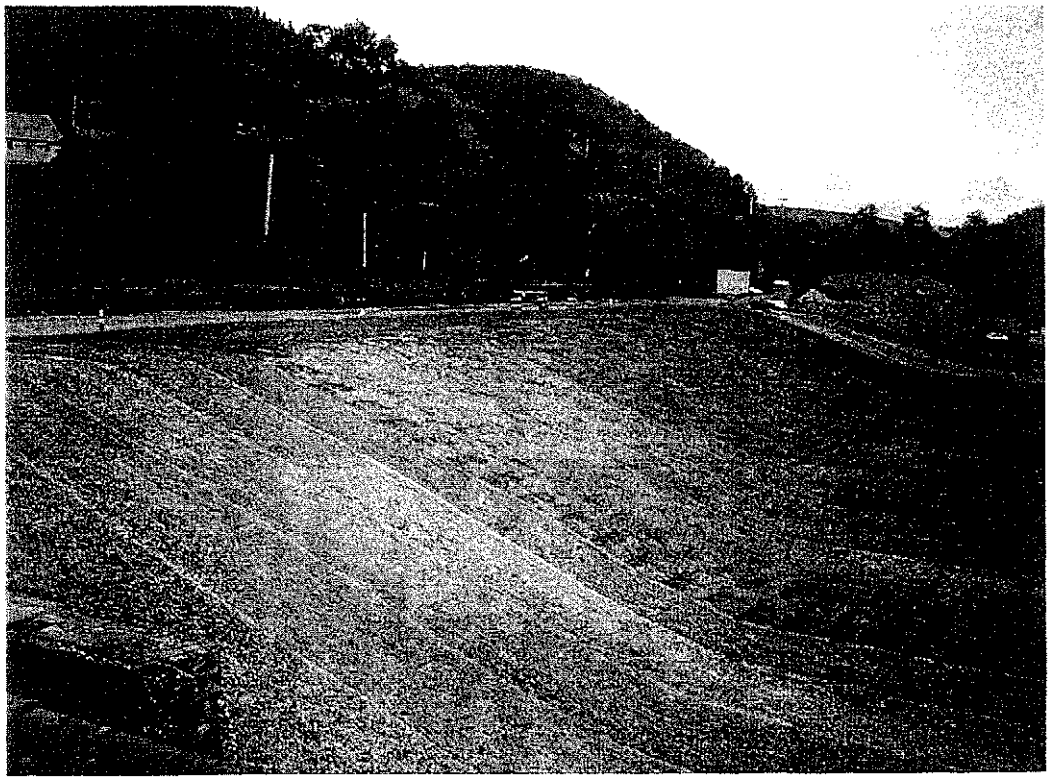
Alan Strobridge, Chairman
Tannery Reuse Assessment Steering Committee

cc: Brian Woods, Hazardous Materials Specialist, State of Vermont,
Pownal Reuse Steering Committee Members
Pownal Board of Selectmen
Russel Ryan, P.E. FA&A
Alison Church, P.E. GPI

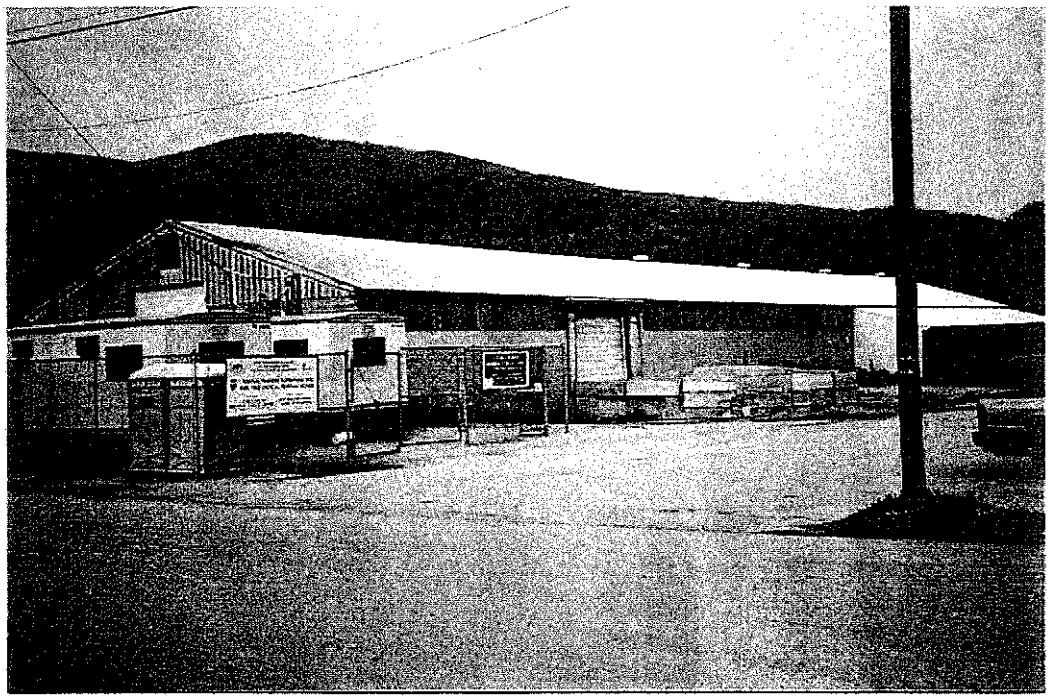
APPENDIX F

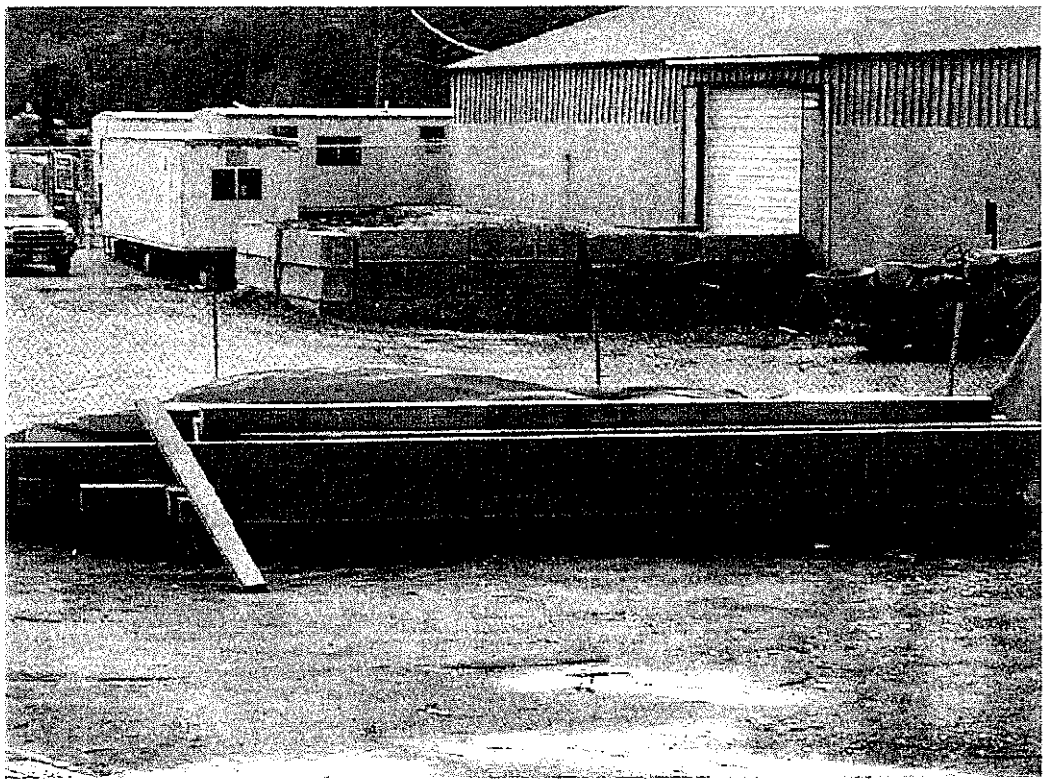
PHOTOGRAPHS



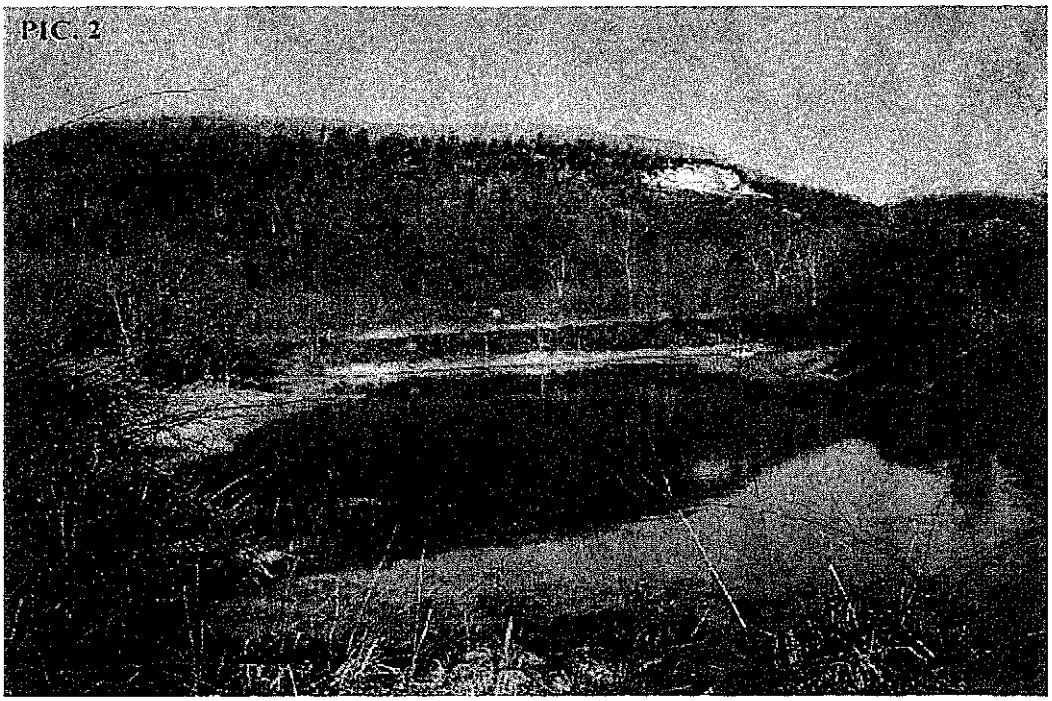


FORMER TANNERY BUILDING SITE, 10/5/00

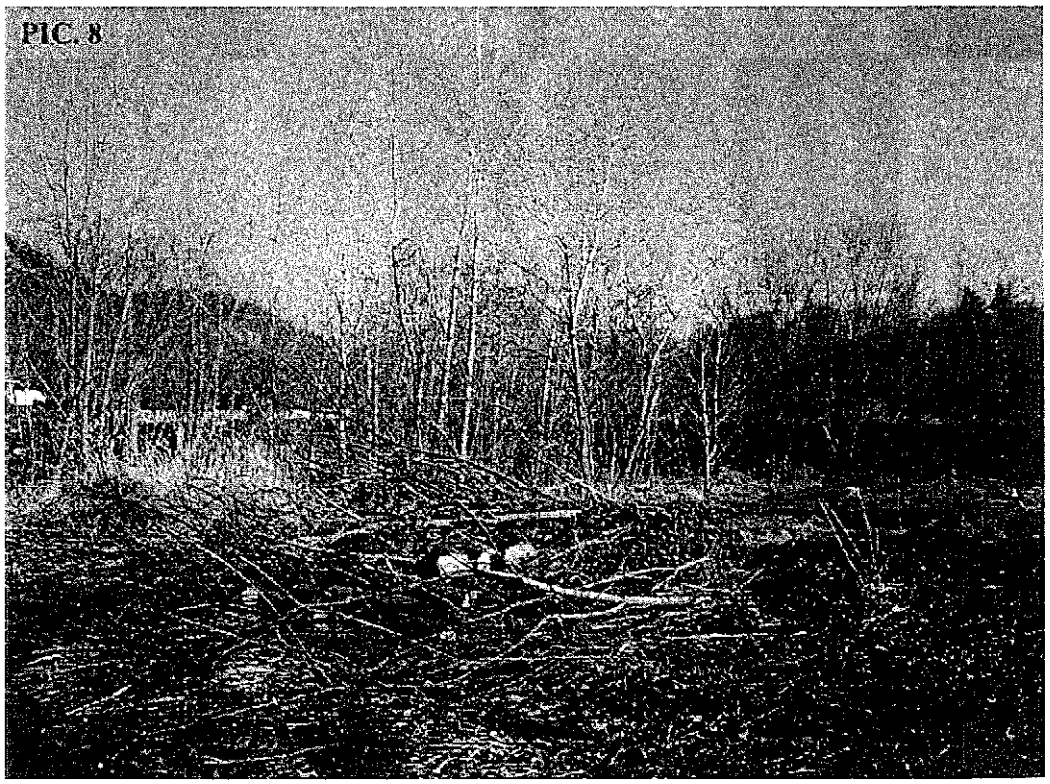




WAREHOUSE SITE



LAGOON SITE (LAGOON 5, LOOKING EAST)



LAGOON SITE (IN LAGOON 4, LOOKING SOUTH)