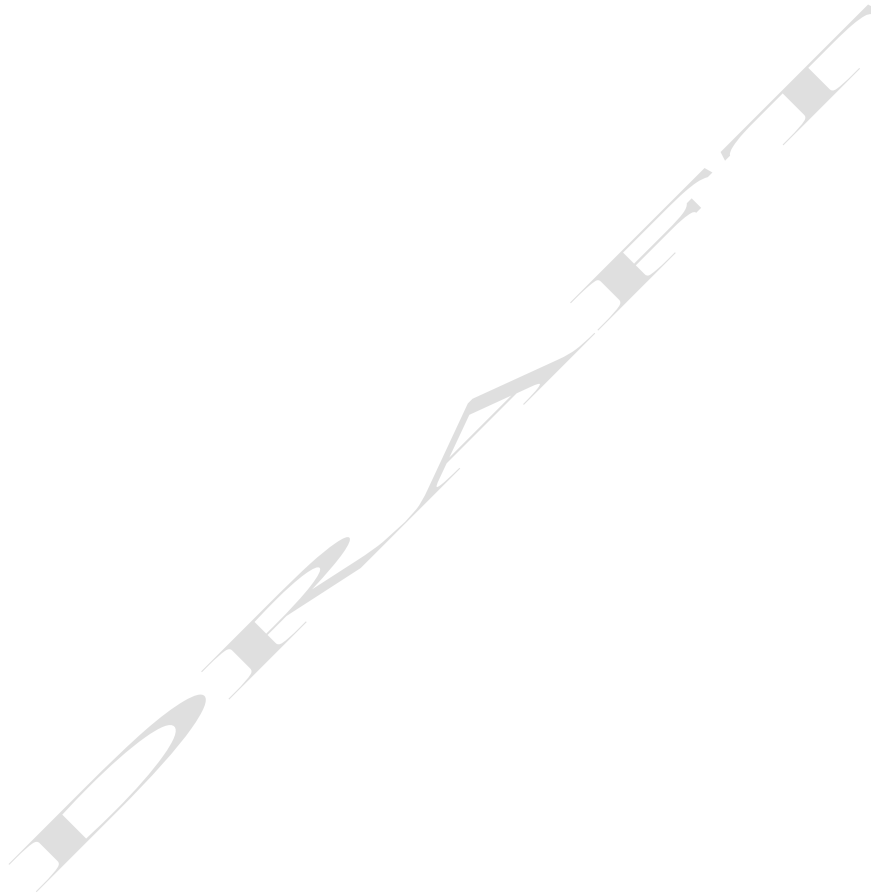


APPENDIX 2: BOLTON COMPREHENSIVE PLAN DEMOGRAPHIC & ECONOMIC PROFILE

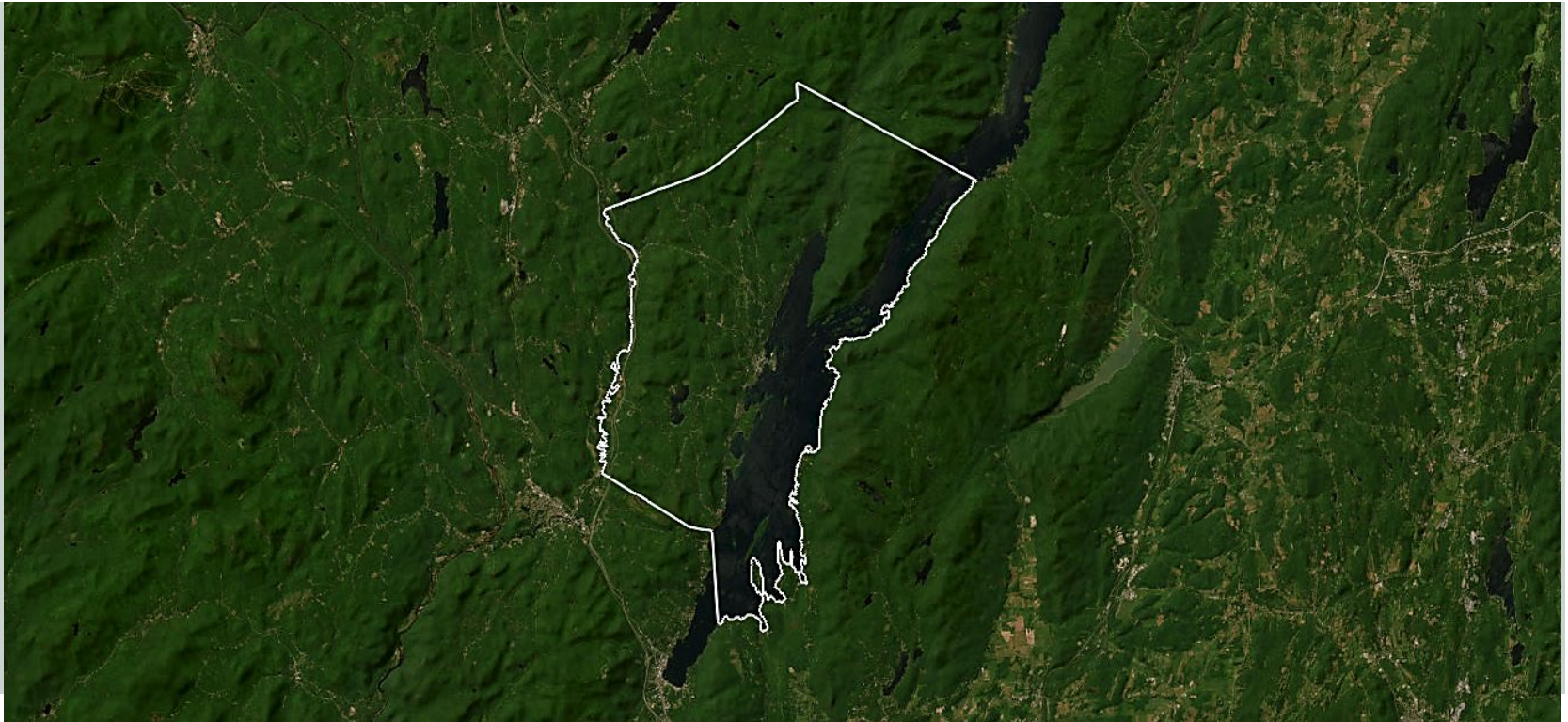




Bolton Comprehensive Plan

Demographic & Economic Profile

July 1, 2024



ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™

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Executive Summary

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



Background: Purpose

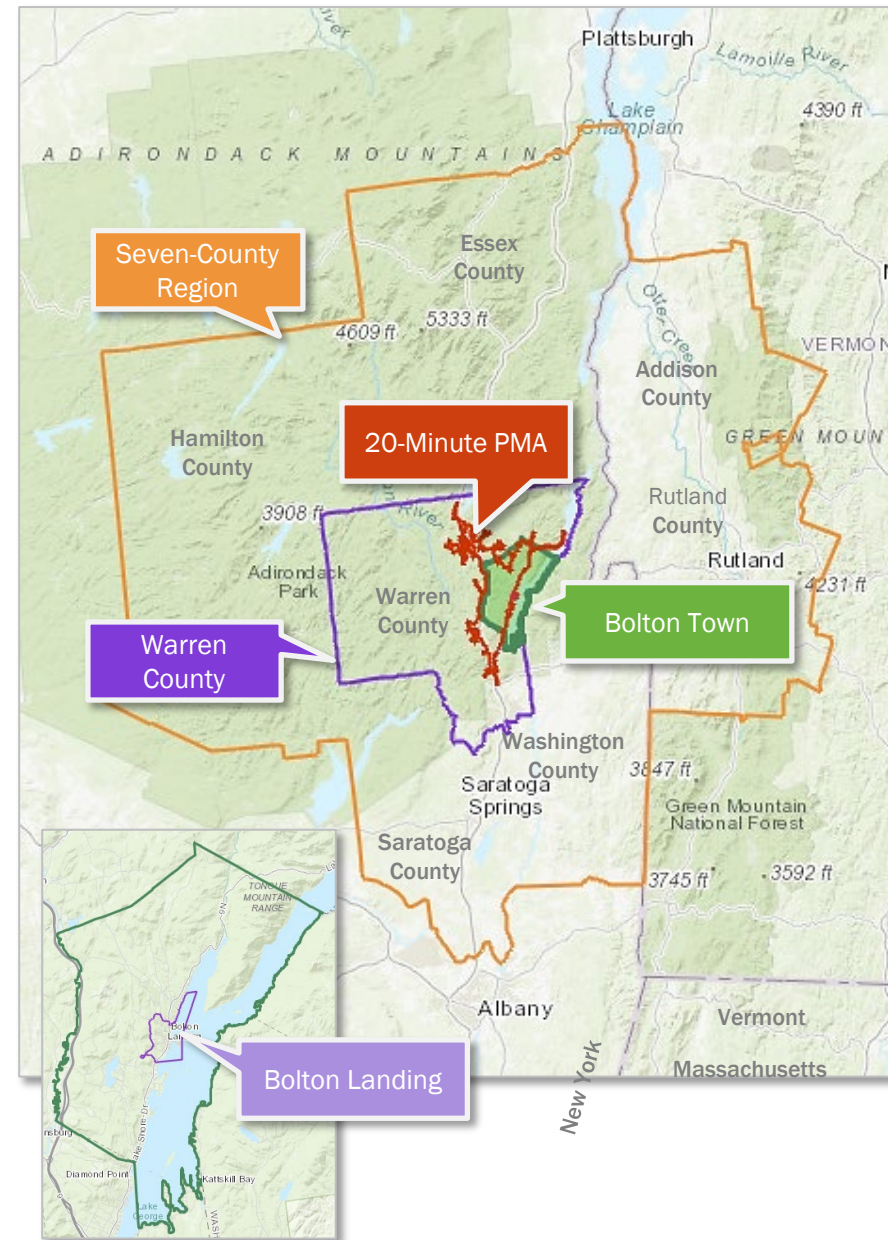
Located in Warren County, New York, the Town of Bolton is currently in the process of updating its comprehensive plan, which will present a desired vision for Bolton, reflective of its community and economic development needs for the next 10 years. A 2023 Warren County housing needs study identified a severe regional housing shortage of rental and single-family homes for the general workforce, seniors, and lower-income individuals. Residents of amenity-rich Adirondack destinations like the town of Bolton, particularly those employed in the tourism and hospitality industry, must compete for available housing with seasonal residents and the short-term rental market.

Currently, Bolton's comprehensive plan does not address short-term rentals and the significant pressures they exert on the conversion of the local economy. In support of the comprehensive plan update, 4ward Planning identified key demographic, economic, and tourism trends to help identify potential near-term goals and strategies.

Background: Study Areas

For purposes of analysis, this report focuses on the following study areas:

- **Bolton Town:** Serves as the base area. Where data is not available for the town of Bolton, hamlet of Bolton Landing data is used.
- **20-Minute PMA:** The Primary Market Area (PMA) represents the catchment area from which approximately 70 percent or more of consumer patronage originates – here defined as the 20-minute drive-time contour from the intersection of State Highway 9N and Steward Avenue, where many of the town's businesses are clustered. This is a typical observed economic pattern. It is recognized there are seasonal tourism inflows from a large surrounding region, including which extends into the greater New York City Metro region.
- **Warren County:** Serves as the Secondary Market Area (SMA), representing a larger catchment area from which the town could prospectively compete for new residents and businesses.
- **Seven-County Region:** The Seven-County Region consists of Essex, Hamilton, Saratoga, Warren, and Washington Counties in New York, and Addison and Rutland Counties in Vermont.

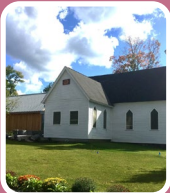


Background: Local Amenities



Lake George & Adirondack Park

- Bolton is located in in the Adirondack Park and is nestled between the shores of Lake George on the East and the Schroon River to the West.



Bolton Historic Museum (Seasonal)

- The museum displays extensive collections of regional artifacts and memorabilia and sponsors a summer lecture series with the Darrin Fresh Water Institute.



The Sagamore Resort

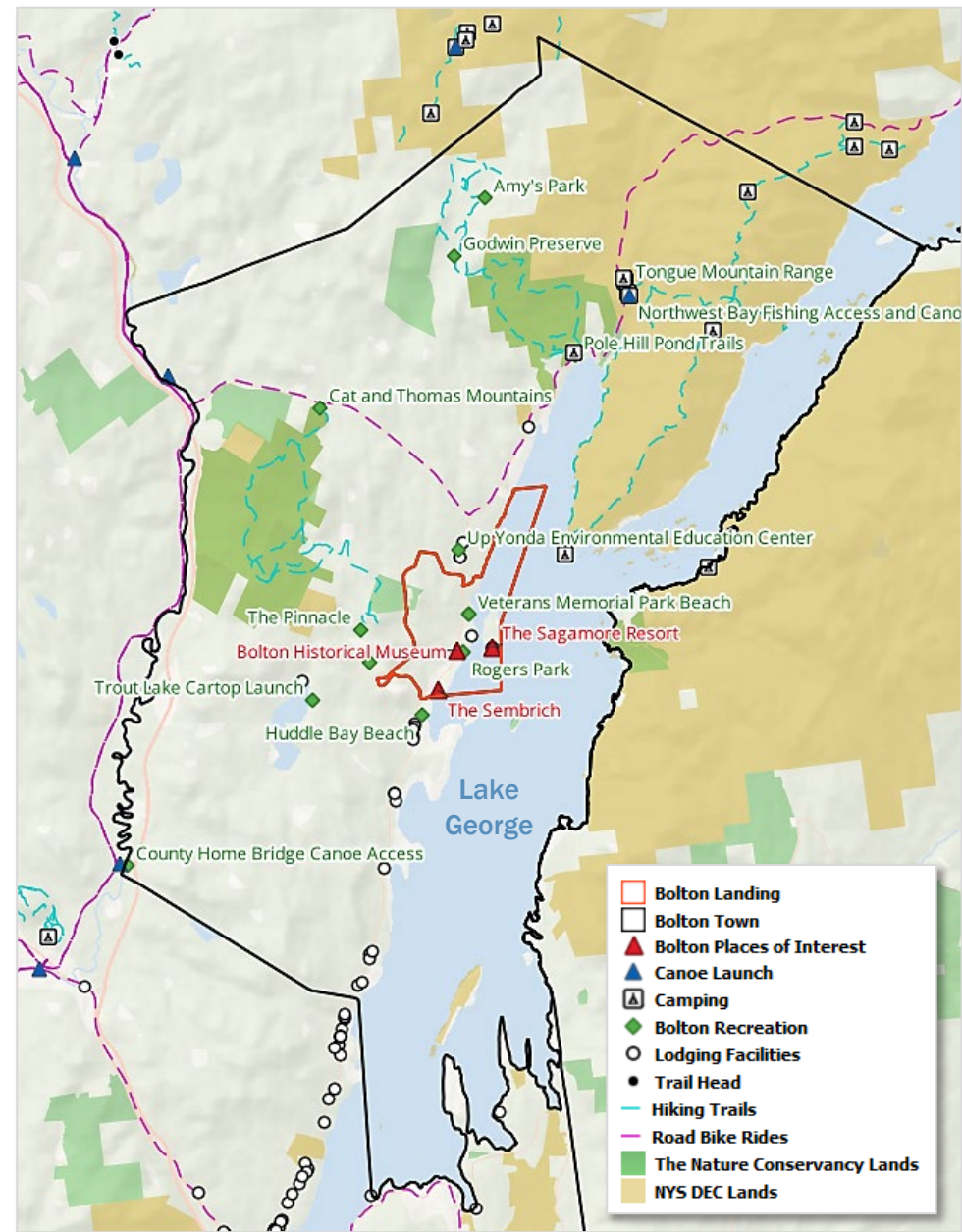
- Historical 375-room luxury hotel situated on a private island on Lake George accessible by bridge.



The Sembrich (Seasonal)

- Museum and grounds of the former lakeside teaching studio of internationally renowned soprano Marcella Sembrich. The site hosts a series of summer concerts, lectures, films, and special events.

Sources: NYS DEC, The Nature Conservancy, Warren County, Esri, 4ward Planning Inc.



Key Market Analysis Findings

People

- Flat to declining population growth in the town and PMA suggests local demand for general retail goods and services will ebb lower over the foreseeable future.
- Bolton is relatively rural, with just 30 residents per square mile – a third of the population density of the PMA.
- Bolton's population is older, compared to the PMA, with higher shares of residents ages 55 and older.
- Bolton's population is predominately White (93 percent), while the population in the larger region is more diverse.
- Bolton has a greater share of adults possessing a bachelor's degree or higher compared to the PMA.

Housing

- Housing choice is limited in Bolton, as 90 percent of housing is characteristic of single-family detached housing.
- Bolton has a low share of renter-occupied housing.
- The vacancy rate among renter-occupied homes in Bolton has been steadily increasing since 2013.
- The number of homes in Bolton vacant due to seasonal use has been increasing over the past two decades.
- Both median gross rents and home values have been increasing in recent years.
- Renter-occupied households in Bolton are twice as likely to be cost-burdened.

Households

- The current average household size in Bolton (2.0 persons) has been decreasing over the past decade, likely due to declining family-household formations.
- The median household income in Bolton is relatively high and is projected to increase through 2028.
- The adjusted median household income in Bolton is much higher among owner-occupied households compared to renter-occupied households, with the difference in incomes between them increasing in recent years.
- Bolton's average household expenditures on selected retail goods and services are relatively high.

Economy

- Overall, total employment in Warren County and the Seven-County Region has been declining since 2006.
- The accommodation and food services sector (the top sector by employment in the town of Bolton) provides relatively low-wage job opportunities (\$28,220 per year).
- The 595 primary job workers employed in the PMA but living outside it represent potential unmet housing demand.
- Visitor spending is a critical driver of Warren County's economy. In 2022, Warren County captured \$859 million in direct tourism spending, with the largest share associated with lodging (51 percent).

Key Findings

Tourism spending on lodging and food and beverage is driving economy

As a gateway to the Adirondacks, visitor spending is a critical driver of the county's economy. In 2022, Warren County captured \$859 million in direct tourism spending, with the largest shares associated with lodging (51 percent) and food and beverage (23 percent). Likely due to the significant presence of resorts (e.g., Sagamore Resort) and short-term rentals (136 currently registered in Bolton, representing five percent of the town's total housing units) located along Lake George, visitor spending on lodging and food and beverages is driving Bolton's local economy.

45% of workers are employed in the accommodation and food service industry

Given tourism spending in the region, the accommodation and food services industry is the top industry by primary job employment share in Bolton and the PMA, employing nearly half of all primary workers in Bolton (45 percent in 2021). Given this sector provides relatively low-wage job opportunities (annual average earnings of \$28,220), there is likely unmet housing demand for workers within this industry.

Rental vacancy rate has been increasing despite strong demand

According to 2022 ACS Five-Year data, the vacancy rate for the inventory of rental units in Bolton has increased dramatically in recent years, rising from 2.2 percent in 2013 to 25.2 percent in 2022. While a deeper housing study would be needed to determine why the vacant rental housing rate is increasing despite strong demand, part of this spike could be due to owners of these units pursuing a short-term rental (STR) model (e.g., Airbnb, VRBO) as a means of generating higher rents per square foot than they might otherwise receive from a conventional annual lease. This has become a national trend and has exacerbated housing affordability.

Key Findings (continued)

Limited housing options, especially for small households and renters

Housing choice for local workers is limited in Bolton, as 90 percent of housing is characteristic of single-family detached housing, and just 22 percent of all housing is renter-occupied. Despite having an average household size of just two people, Bolton has high shares of three- or more bedroom homes. One- and two-person households typically prefer to reside in one- and two-bedroom units to avoid the higher costs (mortgage or rent) associated with larger housing units. Furthermore, the number of vacant housing units due to seasonal use in Bolton has increased dramatically in recent years, making the limited supply of housing stock that much more expensive for local workers. Given the high share of low-wage accommodation and food services workers and modest supply of rental housing, it is not surprising that renter households are twice as likely to be cost-burdened (spending more than 30 percent of their incomes on housing). ***Bolton should pursue both regulations and incentives aimed at increasing the supply of rental housing for those at all income levels such as promoting modular construction techniques, allowing for accessory dwelling units (ADUs), limiting daily/weekly rental properties, and addressing local opposition to strategic density as allowed within the Adirondack Park Agency land use framework.***

Skilled construction workforce in demand but likely priced out of market

Given the large seasonal second home market and investments in year-round properties (new and conversions), there is likely high levels of construction activity in town and demand for skilled construction workers. Given the limited local housing options, many skilled construction workers and apprentices may not be able to afford to live in the region. As a result, older residents with vacation homes, and small lodging and retail businesses in town may find it difficult to hire skilled construction workers.

Key Findings (continued)

Incentivize homeowners to develop ADUs

Bolton could create a tax abatement program for single-family homeowners who create ADUs and agree to rent these units to income-qualified households (earning no more than 80 percent of the AMI). A land-use attorney may need to confirm if such a tax relief incentive program is permissible under state statutes or whether a petition of the state legislature to amend the existing tax abatement statute permitting tax relief for single-family homeowners creating ADUs which are rented to income-qualified individuals is warranted.

Demographic & Growth Trends Analysis

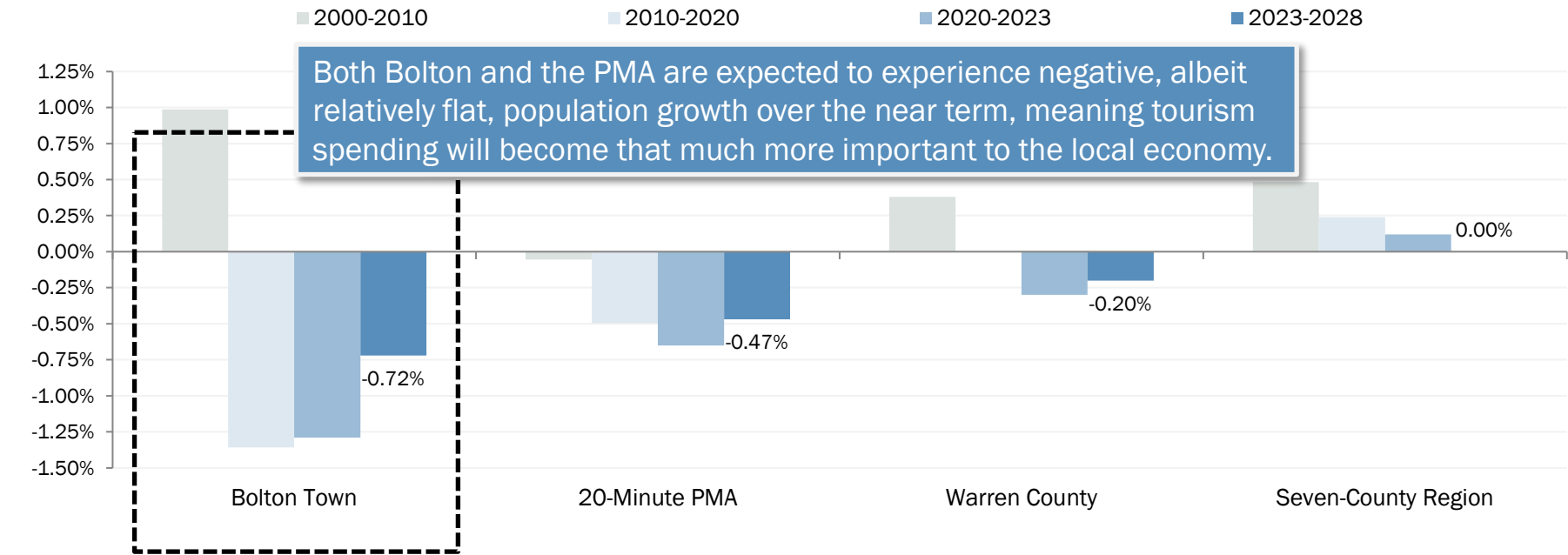
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People

Population

Annualized Percentage Change, Total Population



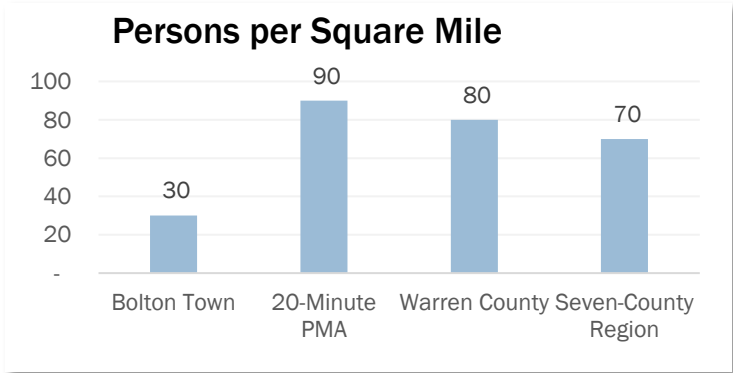
Population by Geography

	2000	2010	2020	2023	2028	2023-2028 Change
Bolton Town	2,120	2,330	2,010	1,930	1,860	-70
20-Minute PMA	7,850	7,810	7,420	7,270	7,100	-170
Warren County	63,300	65,710	65,740	65,100	64,460	-640
Seven-County Region	468,580	491,200	502,970	504,960	505,070	110

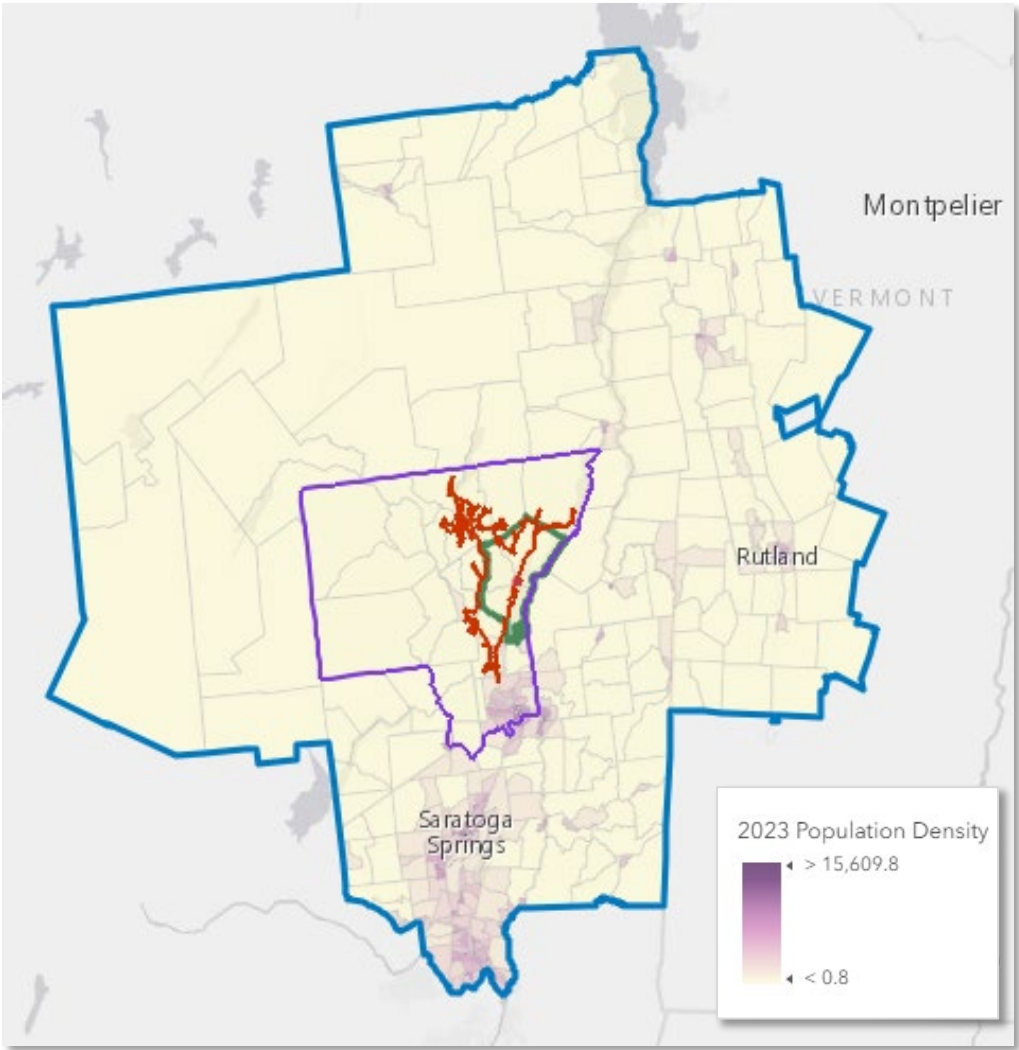
Source: U.S. Census Bureau; Esri; 4ward Planning Inc., 2024

Population Density

Bolton is relatively rural, with just 30 residents per square mile – a third of the population density of the PMA. This low population density and small population, generally, indicates the importance of tourism spending in support of local businesses.



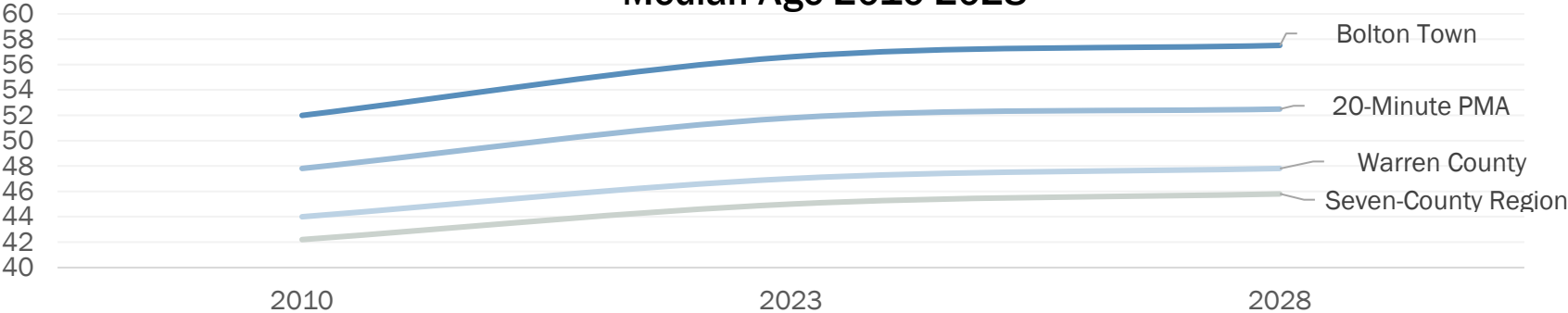
Persons per Square Mile by Block Group



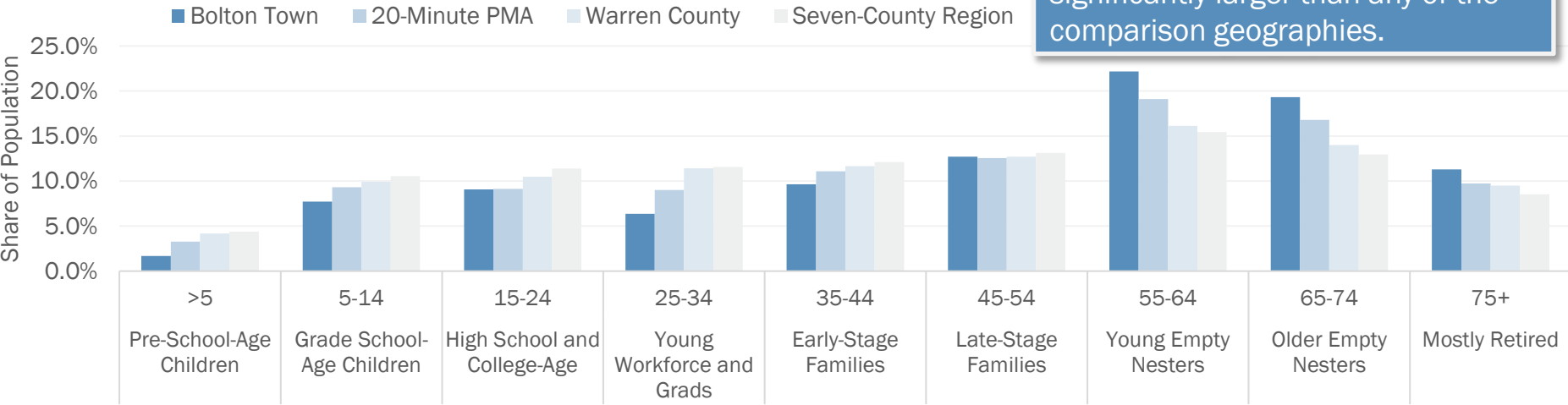
Source: U.S. Census Bureau; Esri; 4ward Planning Inc., 2024

Age

Median Age 2010-2028



Age Distribution, 2023

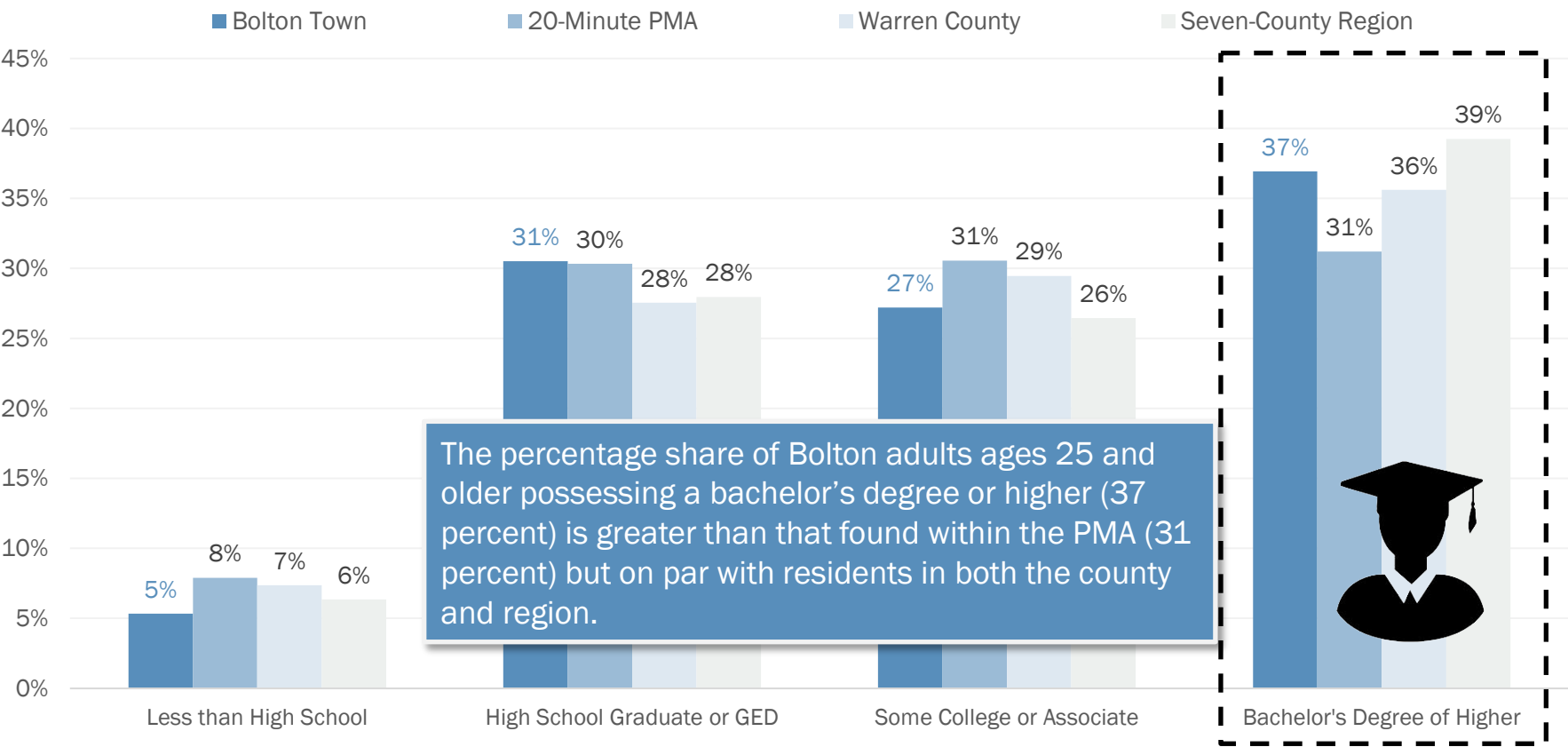


Approximately 53 percent of Bolton’s population is ages 55 and older – a demographic share significantly larger than any of the comparison geographies.

Source: Esri; 4ward Planning Inc., 2024

Educational Attainment

Highest Educational Attainment (% of Adult Population 25 and Older) 2023



Source: Esri; 4ward Planning Inc., 2024

Households

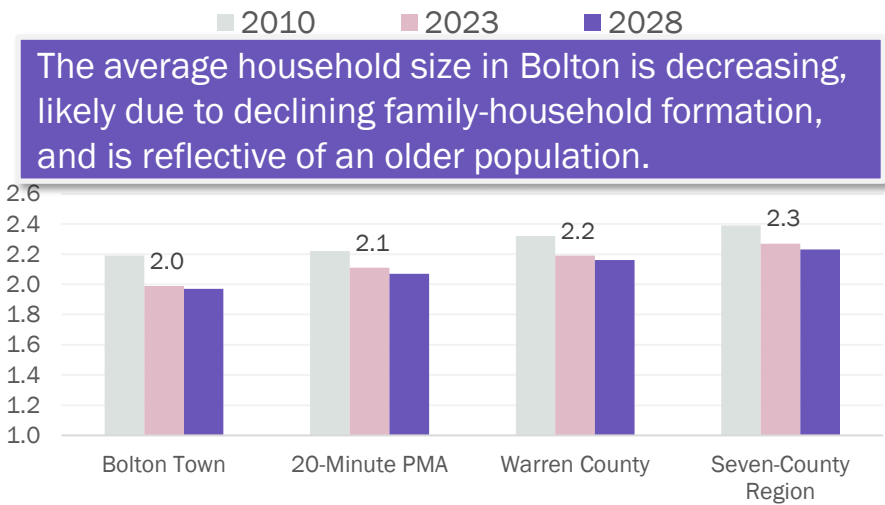
Total Households & Size

Bolton is projected to experience a relatively small two-percent decrease in the number of households through 2028.

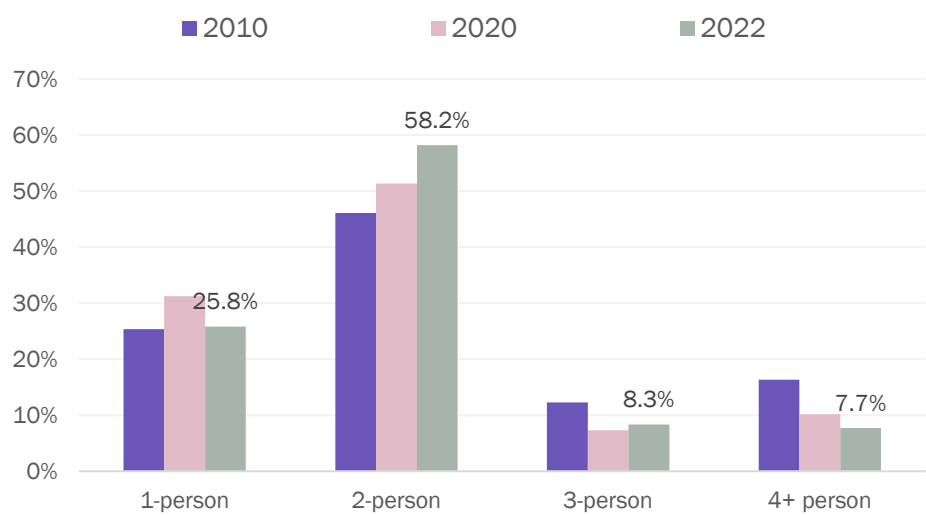
Households by Geography

	2000	2010	2020	2023	2028	2023-2028 Change
Bolton Town	940	1,060	990	970	950	-20
20-Minute PMA	3,360	3,510	3,490	3,430	3,410	-20
Warren County	25,730	27,990	29,060	29,170	29,360	190
Seven-County Region	182,490	199,020	212,450	215,860	219,900	4,040

Household Size Trends



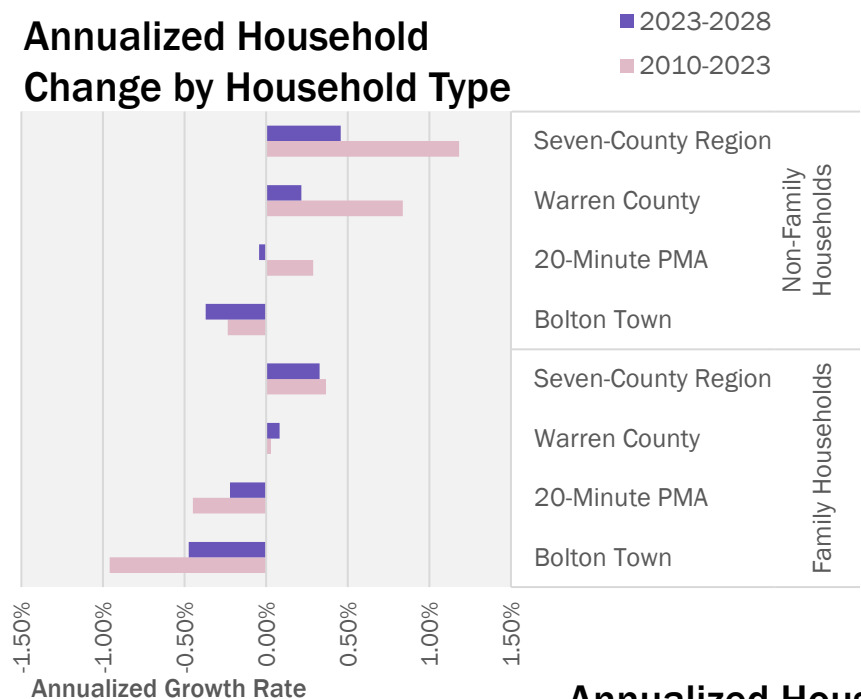
Bolton Households by Size Trends



Sources: U.S. Census Bureau; American Community Survey, 2022, Esri; 4ward Planning Inc., 2024

Household Formation

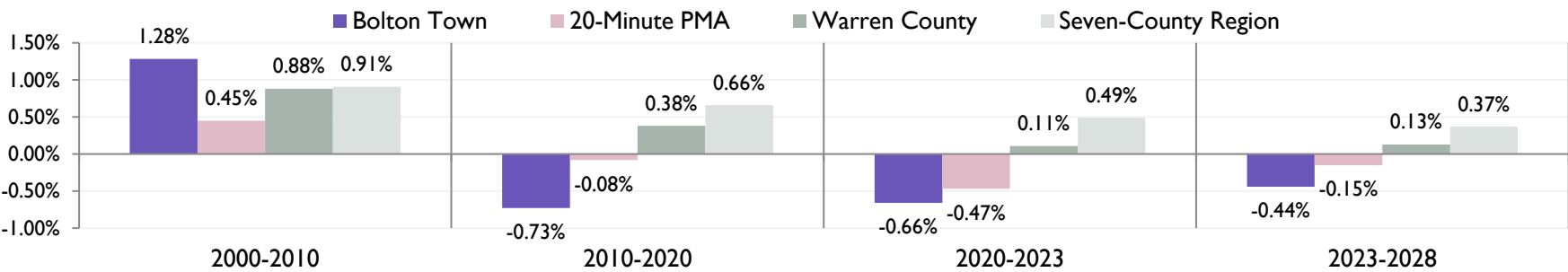
Annualized Household Change by Household Type



Generally, the number of family households significantly declined within Bolton and the surrounding PMA from 2010 to 2023, distinct from family household change at the county and regional level. The difference is likely reflective of a higher cost of housing in Bolton and the PMA, compared to the housing costs for the broader region.

Household formation in all geographies will favor small non-family households through 2028, according to Census projections, with Bolton and the PMA expected to realize slight declines in this category.

Annualized Household Change



Sources: U.S. Census Bureau; Esri; 4ward Planning Inc., 2024

Household Income

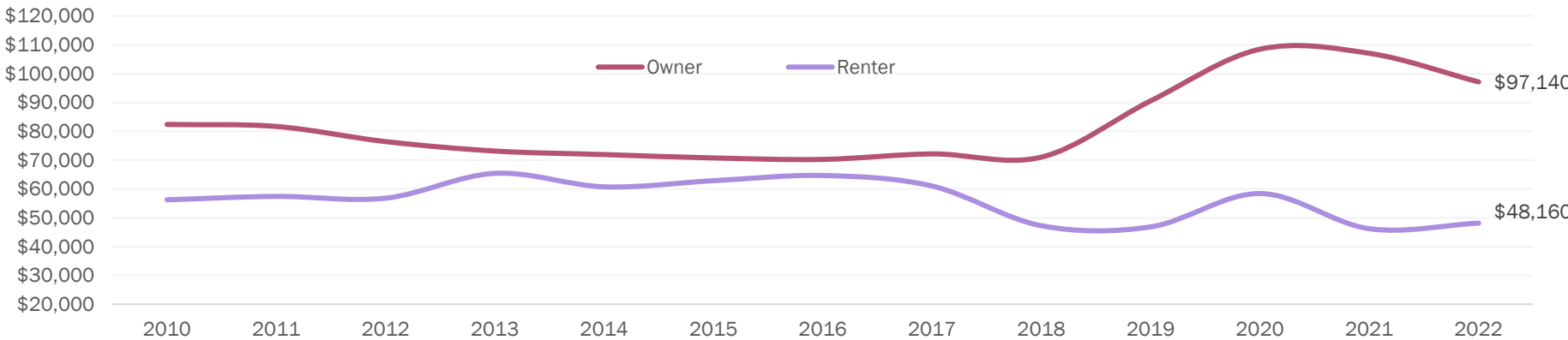
Median household income in Bolton is relatively high at nearly \$84,000 and is projected to increase to a little more than \$95,000 by 2028.

Projected Median Household Income 2023-2028

	2023 (Estimated)	2028 (Projected)	2023-2028	% Change
Bolton Town	\$83,830	\$95,070	\$11,240	2.7%
20-Minute PMA	\$76,080	\$83,470	\$7,390	1.9%
Warren County	\$75,690	\$80,940	\$5,250	1.4%
Seven-County Region	\$79,160	\$86,050	\$6,890	1.7%

When median household income is adjusted by housing tenure, a significant difference in median household income is uncovered, with owner-occupied households exhibiting a median household income two times that of renter-occupied households.

Adjusted Median Household Income (2022 Dollars)

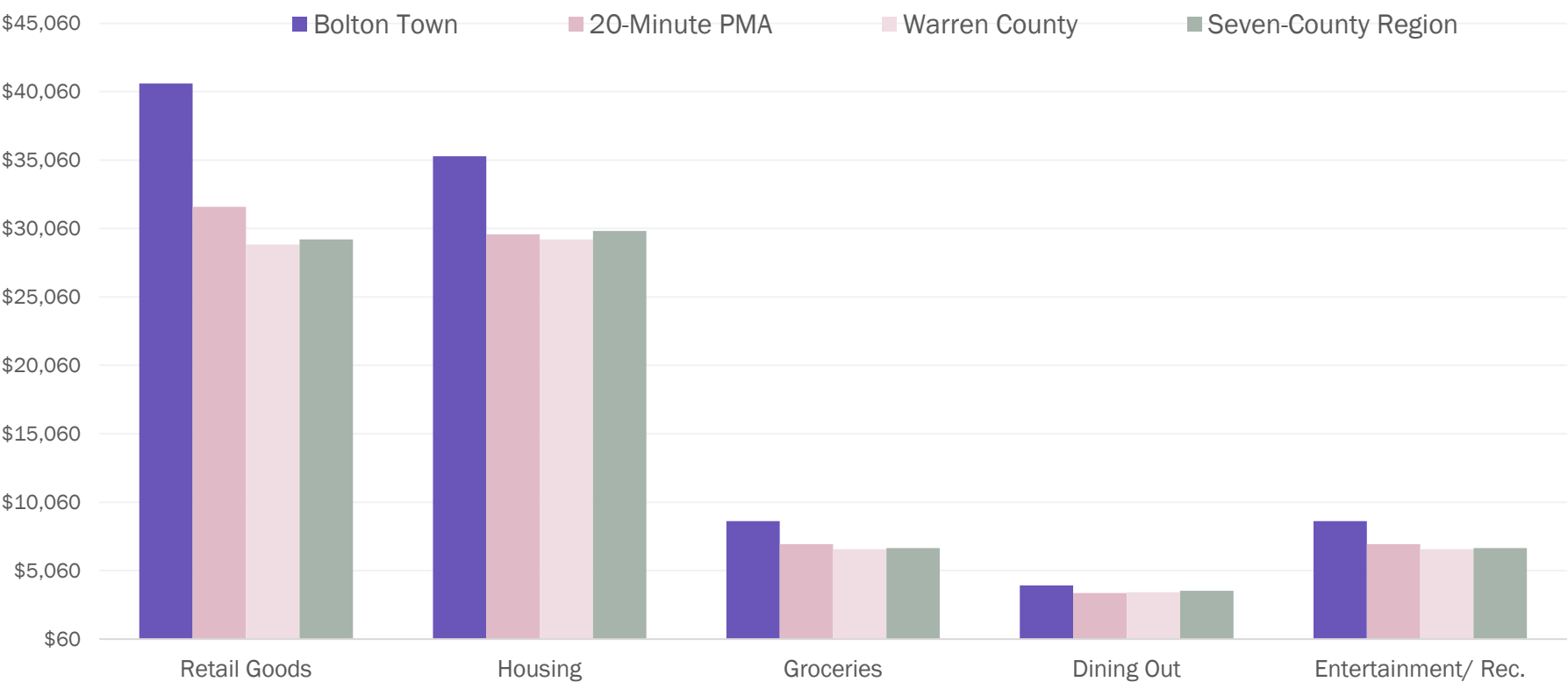


Source: Esri; 4ward Planning Inc., 2024

Household Expenditures

Bolton’s average household expenditures on selected retail goods and services are much higher than that in the PMA and region.

2023 Average Household Spending by Geography

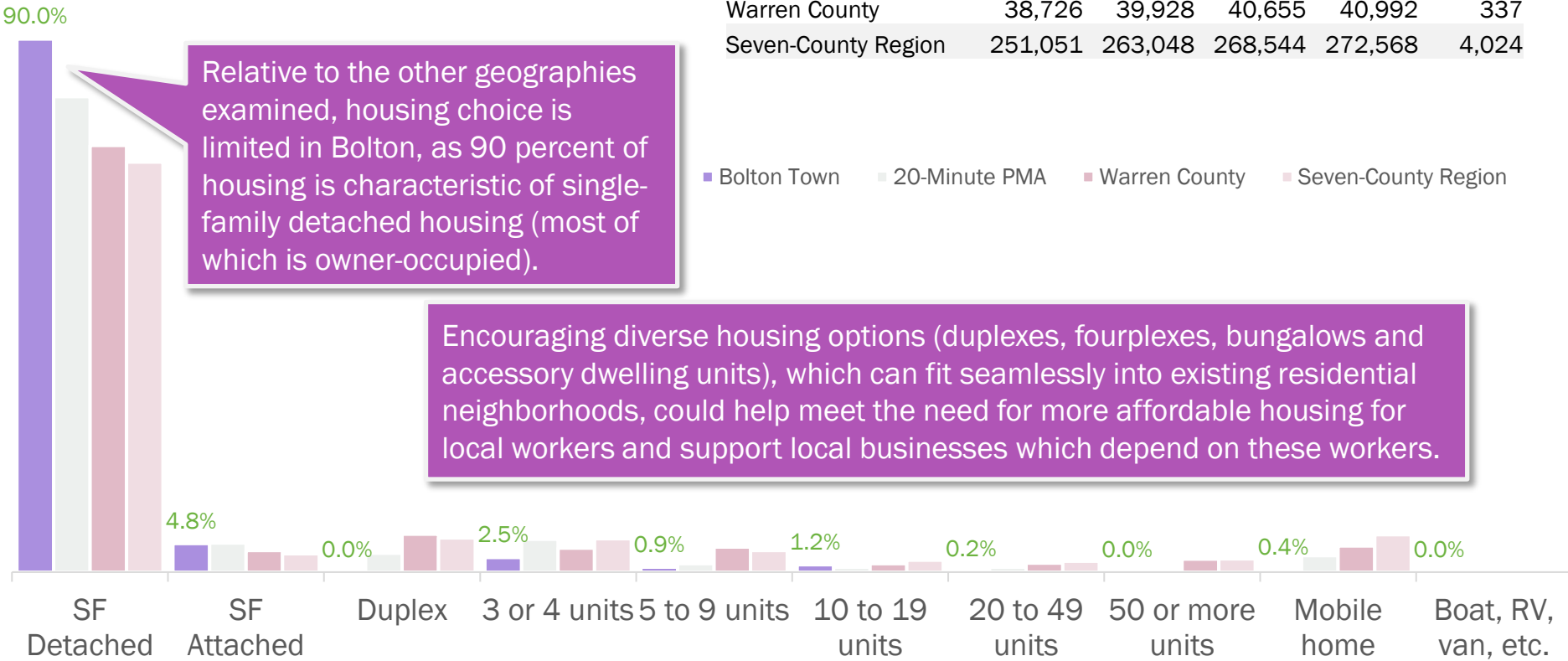


Source: Esri; 4ward Planning Inc., 2024

Housing

Housing Inventory

Housing Inventory by Structure Type, 2021



Housing Units by Geography

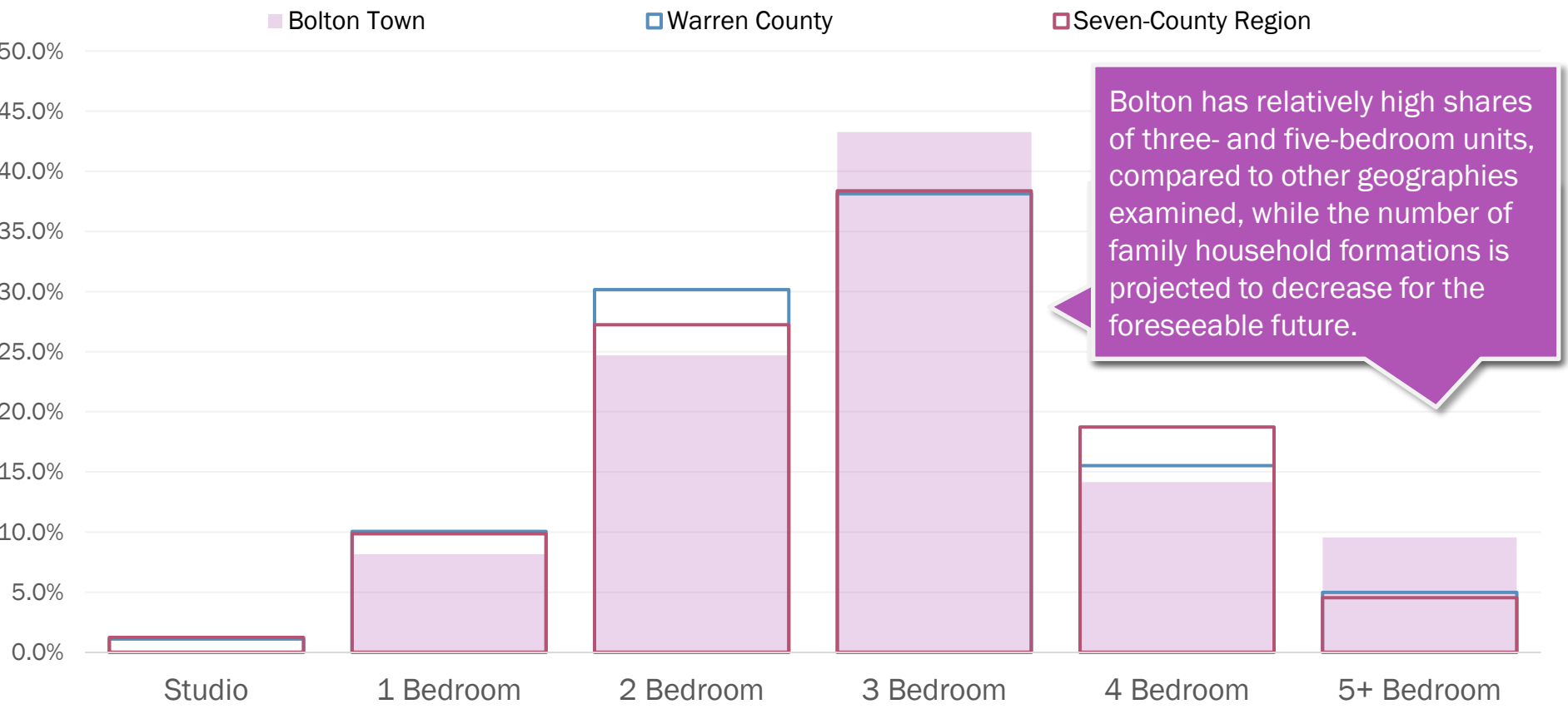
	2010	2020	2023	2028	2023-2028 Change
Bolton Town	2,581	2,514	2,528	2,528	0
20-Minute PMA	6,350	6,299	6,350	6,367	17
Warren County	38,726	39,928	40,655	40,992	337
Seven-County Region	251,051	263,048	268,544	272,568	4,024

■ Bolton Town ■ 20-Minute PMA ■ Warren County ■ Seven-County Region

Source: U.S. Census Bureau, 2021 American Community Survey, 4ward Planning Inc., 2024; Opticos Design, Inc

Housing Unit Size

Housing by Bedrooms, 2022

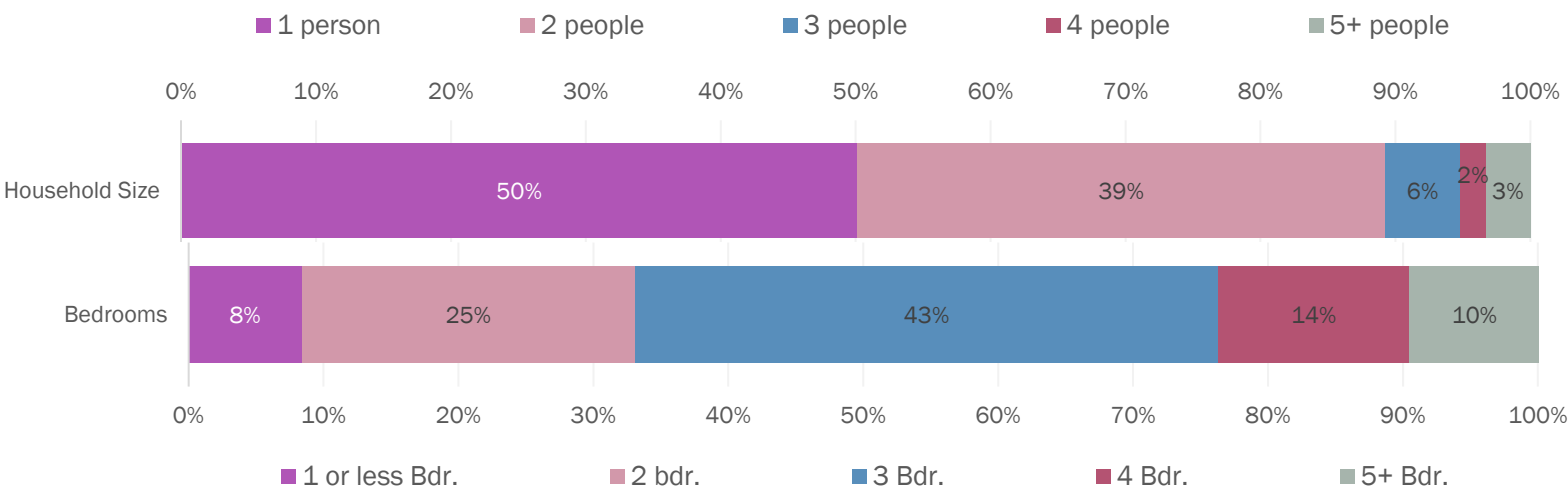


Source: 2021 ACS 5-Year Estimates, DP04

Housing Unit Size: Mismatch

The share of one-person households (50 percent) in Bolton is much higher than the share of studios and one-bedroom units, combined (eight percent). In other words, there is likely a mismatch between housing unit bedroom counts and household size among small households. As a result, some individuals living alone in the town might prefer to reside in smaller, more affordable studios or one-bedroom dwellings, if such were available, but are paying more for larger units.

Household and Unit Size, 2022

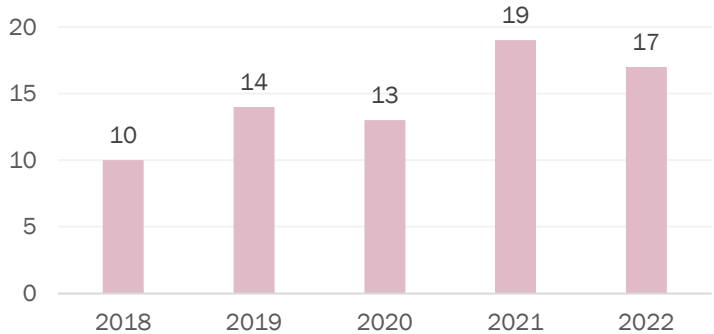


Source: 2021 ACS 5-Year Estimates, B11016; DP04

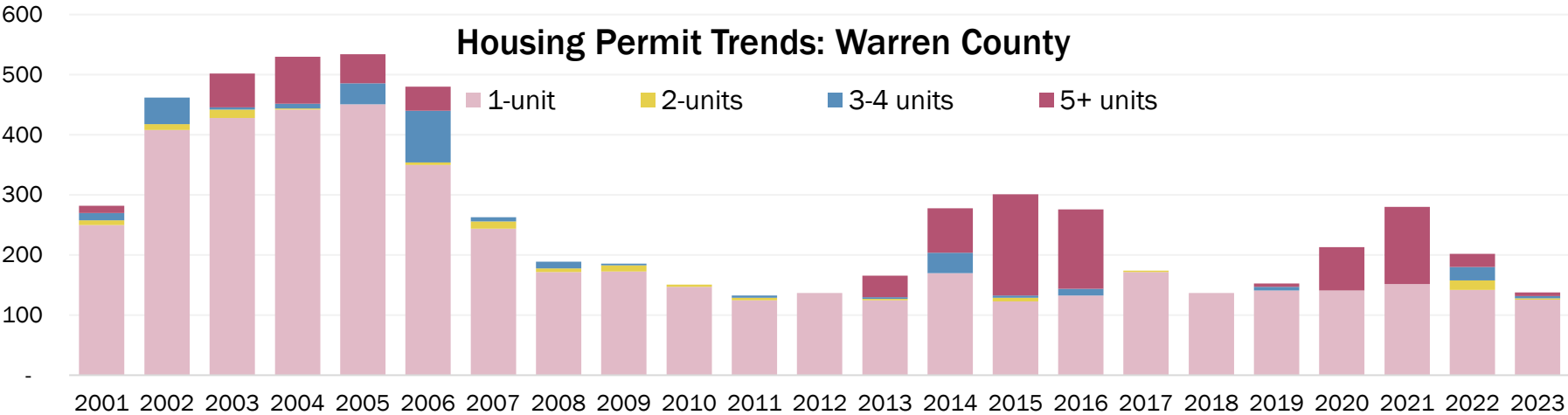
Housing Permits Trends

Building permits were issued for 73 single-family units in Bolton from 2018 to 2022. Permits for two or more housing units were issued for other Warren County communities over the same time period.

Major Residential Building Permits:
Town of Bolton



Housing Permit Trends: Warren County

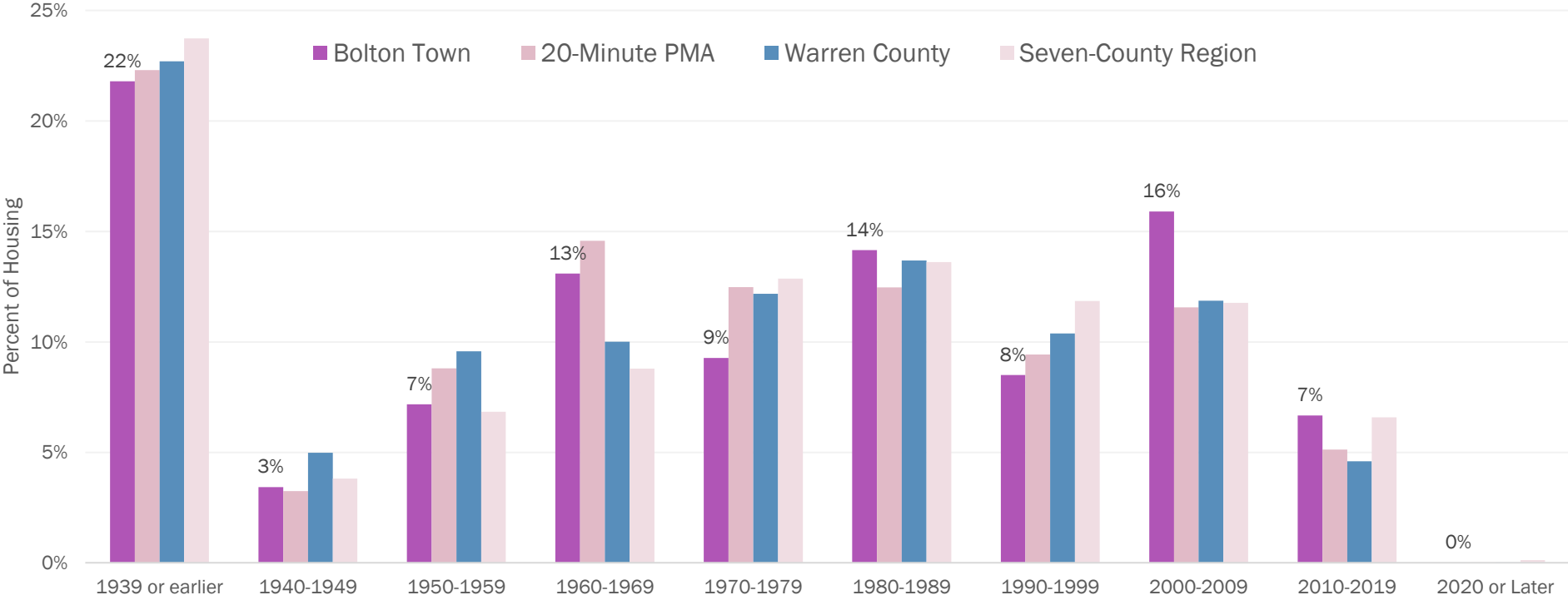


Source: Bolton Town Planner; SOCDS Building Permits Database

Housing Age

Housing Inventory by Year Built

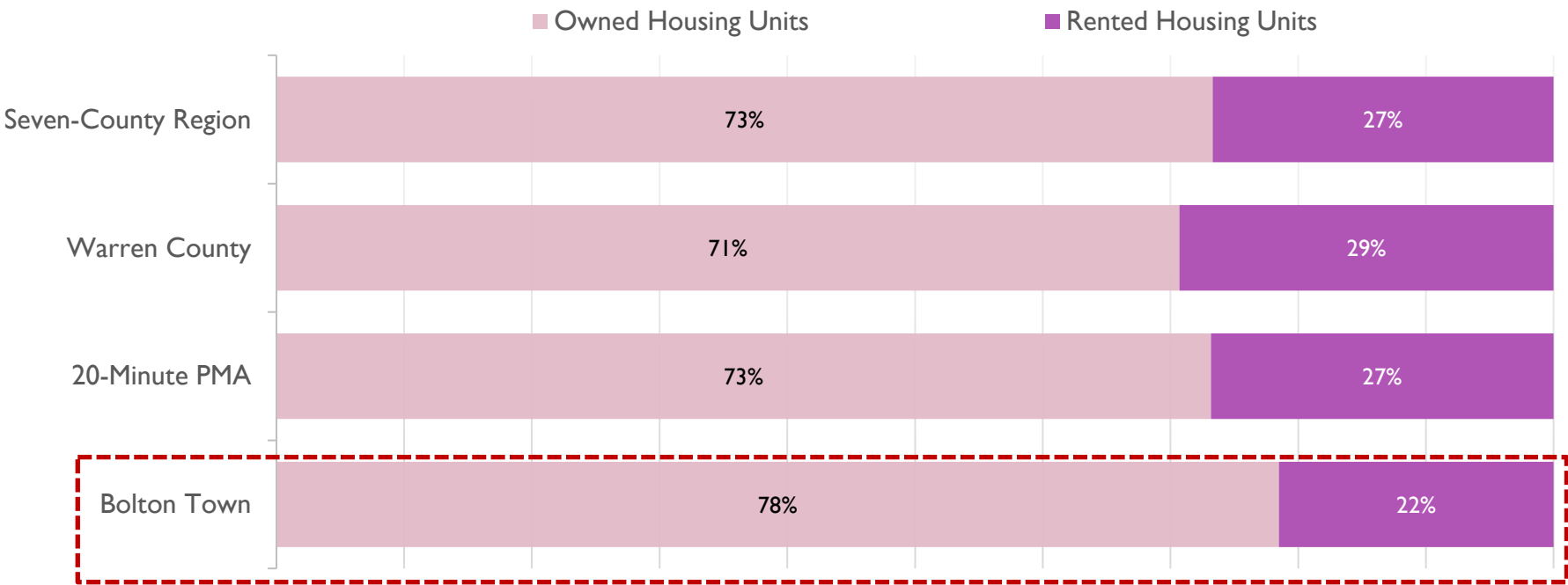
Relatively little housing stock has been built within the region since 2000 (as a percentage of its total housing inventory, Bolton had the greatest percentage share of new housing built since 2000 (23 percent or 581 units) among all other geographies examined. While it is unlikely that a similar share of housing would be developed in Bolton in the foreseeable future, even a five-percent increase in the current inventory (representing approximately 126 units could significantly benefit local workers in need of such housing.



Source: U.S. Census Bureau, 2020 American Community Survey, 4ward Planning Inc., 2024

Housing Tenure

Housing Tenure as Share of Total Occupied Housing Units, 2023



Throughout the region, less than three out of every 10 occupied housing units are renter-occupied, with the town of Bolton exhibiting the lowest share of renter-occupied units (22 percent) among all geographies examined. Given most workers within the accommodation and food and beverage industries are low- to moderate-income, the relatively small share of rental housing stock in the vicinity of their places of employment contributes to the housing cost burdens these workers face, ultimately undermining the economic resilience of the region.

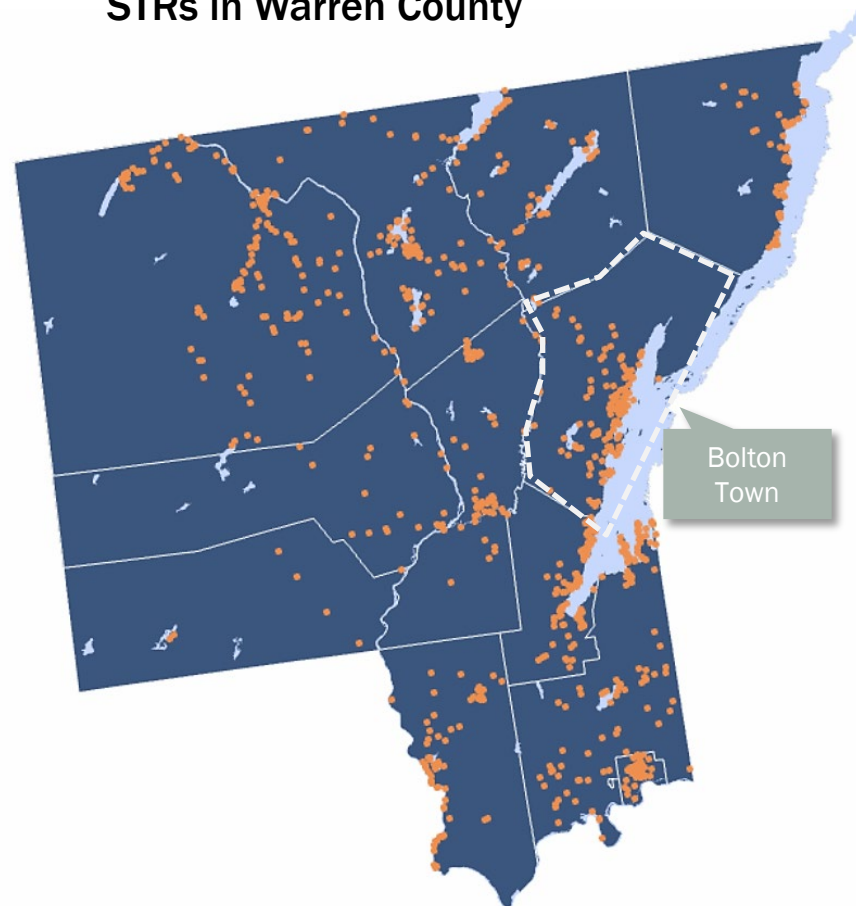
Source: Esri; 4ward Planning Inc., 2024

Short-Term Rentals

Short-term rentals (STRs) are defined as a rental of 30 days or shorter in duration. This includes short-term rental property owners who rent on their own or use companies such as Airbnb, VRBO, or any other rental platform. As of September 2020, STRs in Warren County have been required to register and pay a licensing fee. As of September 2023, Warren County had 934 STRs registered with the Warren County Treasurer's Office, as required by county law. As illustrated in the map, a relatively high percentage of short-term rentals (orange dots) are in waterfront locations like the town of Bolton.

According to Bolton's Town Planner, there are 136 currently registered with the Town of Bolton (representing five percent of the town's total housing units) and 11 units in the process of being registered. This is a significant number of housing units, given the need for permanent affordable units.

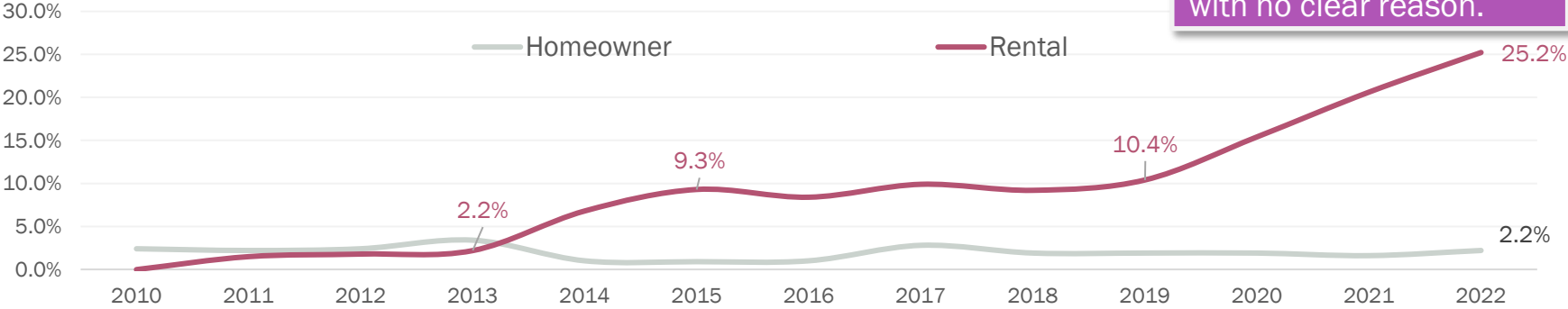
STRs in Warren County



Sources: Town of Bolton; Warren County GIS, Short-Term Rentals in Warren County, NY – DRAFT, November 27, 2023

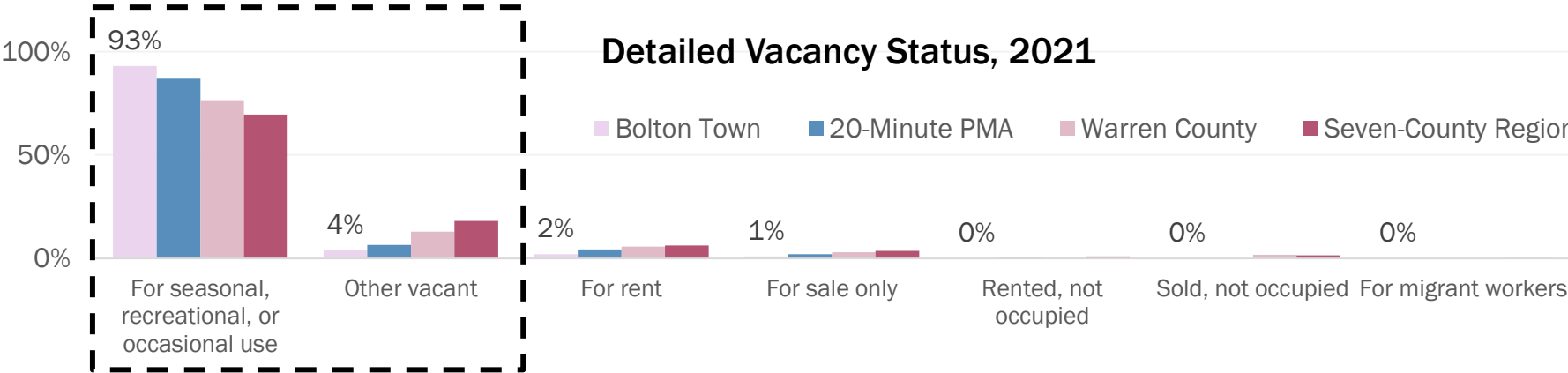
Housing Vacancy

Housing Vacancy By Tenure Trends, Bolton Town



The vacancy rate among renter-occupied homes in Bolton has increased dramatically since 2019 with no clear reason.

According to the U.S. Census, 93 percent of vacant housing in Bolton is vacant due to seasonal, recreational, or occasional use (often characteristic of places where people own second homes).

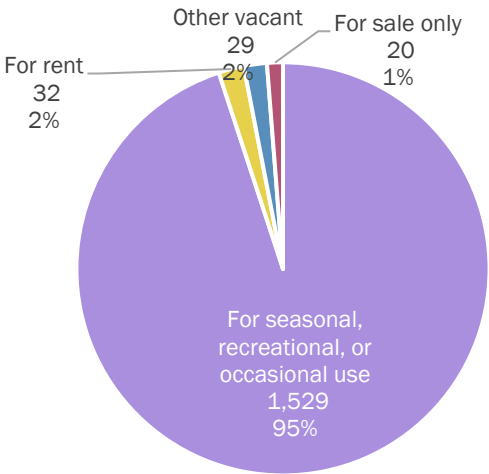


Note: Rental and homeowner vacancy rates do not include "other vacant" or "seasonal" units in the calculation of vacancy rates.
Source: American Community Survey 5-Year Estimates; 4ward Planning Inc., 2024

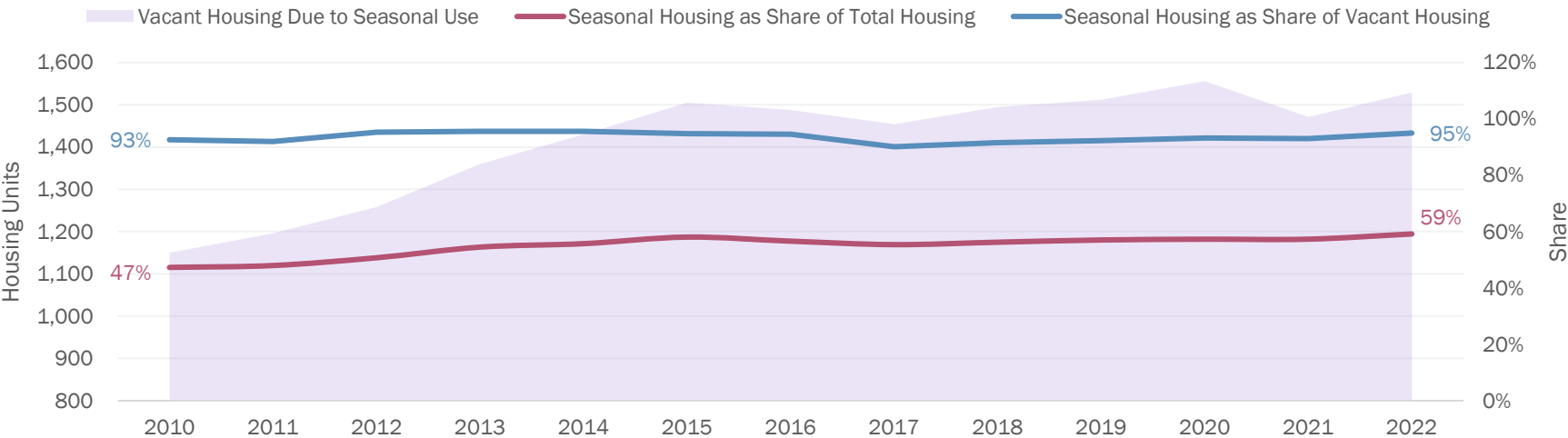
Detailed Housing Vacancy, Bolton Town, 2022

Housing Vacancy (continued)

According to the U.S. Census, in 2022, 1,530 housing units in Bolton were vacant due to seasonal, recreational, or occasional use (95 percent of all vacant housing and 59 percent of all housing). The number of homes in Bolton vacant due to seasonal, recreational, or occasional use has been increasing over the past two decades (represented just 1,150 units in 2010).



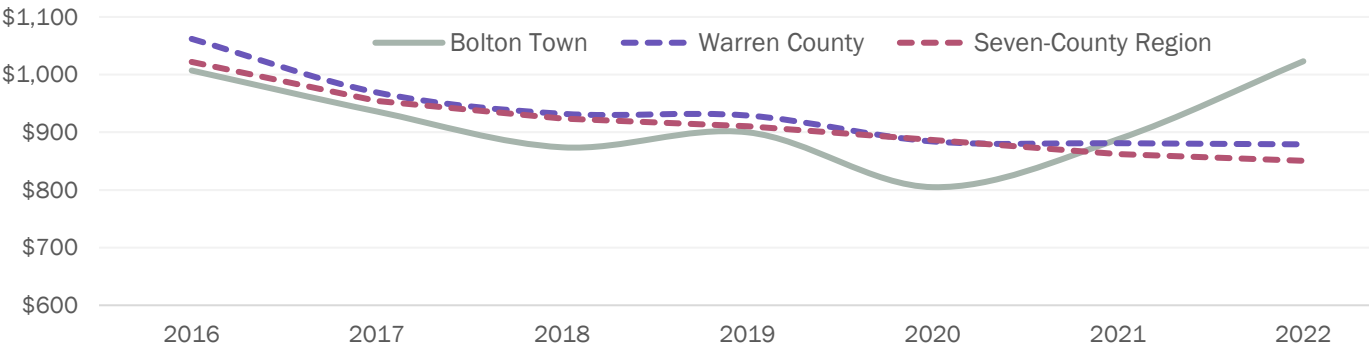
Housing Vacant Due to Seasonal, Recreational, or Occasional Use, Bolton Town



Note: Rental and homeowner vacancy rates do not include "other vacant" or "seasonal" units in the calculation of vacancy rates.
Source: American Community Survey 5-Year Estimates; 4ward Planning Inc., 2024

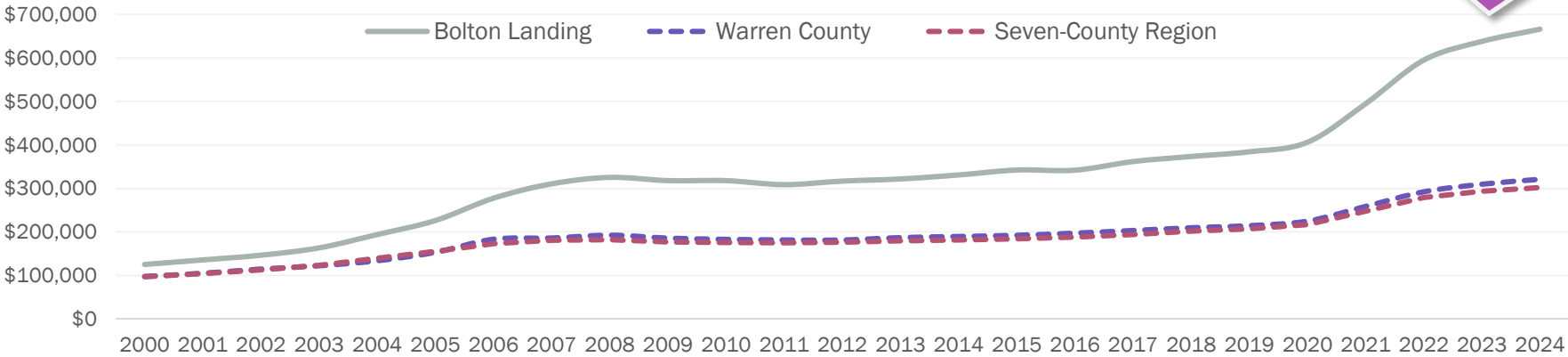
Housing Costs

Median Real Gross Rent Trends



Median gross rents in the town of Bolton have been increasing in recent years, while they have been declining in the county and larger region over the same time.

Home Value Index



Home values in the hamlet of Bolton Landing (data for the town is not available) have also increased in recent years, at a rate greater than those in the county and larger region.

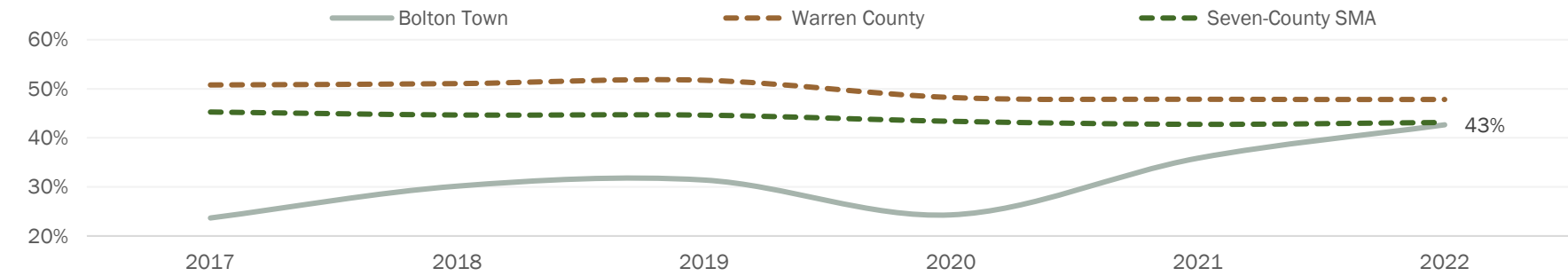
Note: Median real (inflation-adjusted) gross rent includes contract rent plus utilities. Zillow Home Value Index (ZHVI) represents a smoothed, seasonally adjusted measure of the typical home value and market changes across a given SMA and housing type, reflecting the typical value for homes in the 35th to 65th percentile range. Average 2024 data is as of February 2024.

Sources: American Community Survey; Zillow

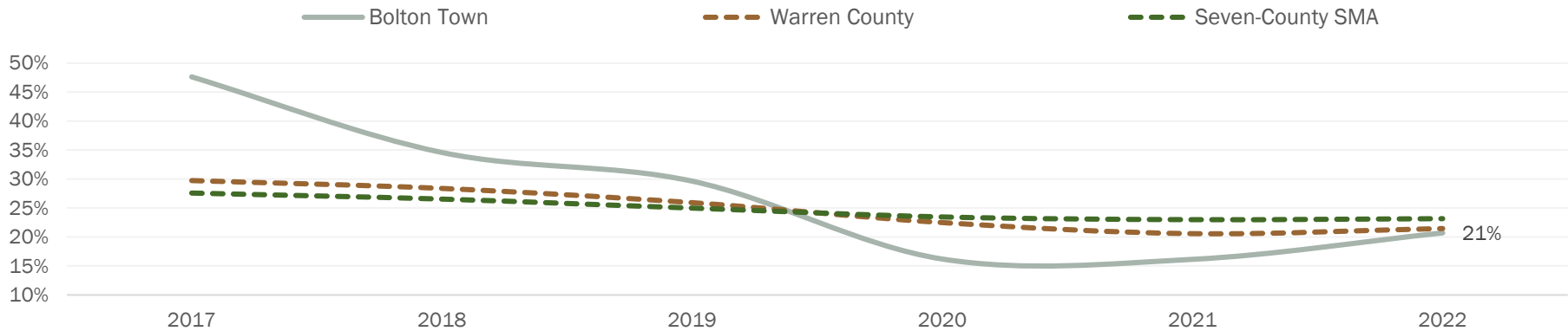
Housing Cost Burden

In 2022, the share of renter-occupied households in the town of Bolton spending more than 30 percent of their incomes on housing (43 percent) is approximately double the share of owner-occupied households with mortgages spending more than 30 percent of their incomes on housing (21 percent).

Renter-Occupied Households with Housing Cost Burden¹



Owner-Occupied Households with a Mortgage and Housing Cost Burden¹



¹HUD defines cost-burdened families as those “who pay more than 30 percent of their incomes for housing” and “may have difficulty affording necessities such as food, clothing, transportation, and medical care.”

Sources: ACS 5-Year Estimates Detailed Tables, B25070, S2506

Economic Trends

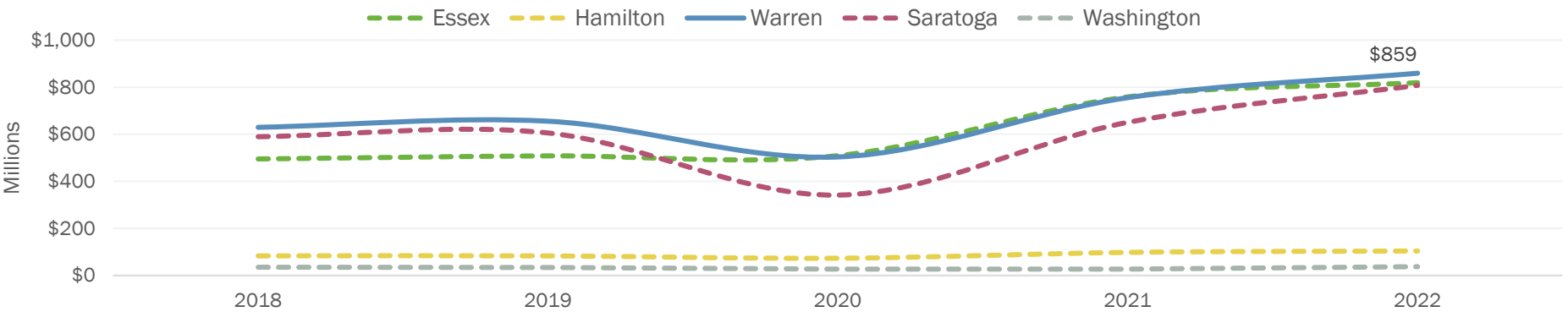
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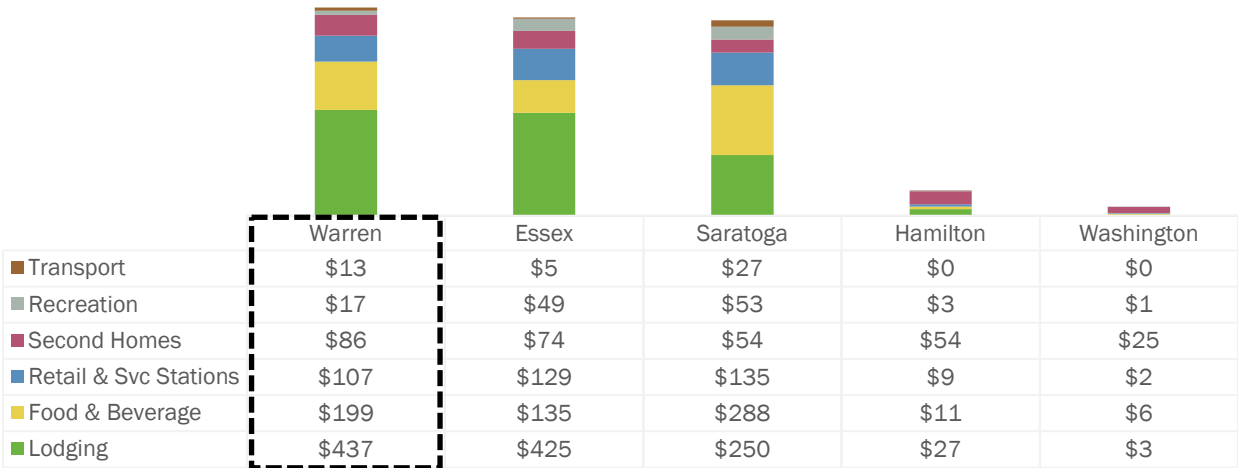
Employment & Industry

Tourism Economy: SMA (NY Portion)

Traveler Spending Trends



Traveler Spending, 2022



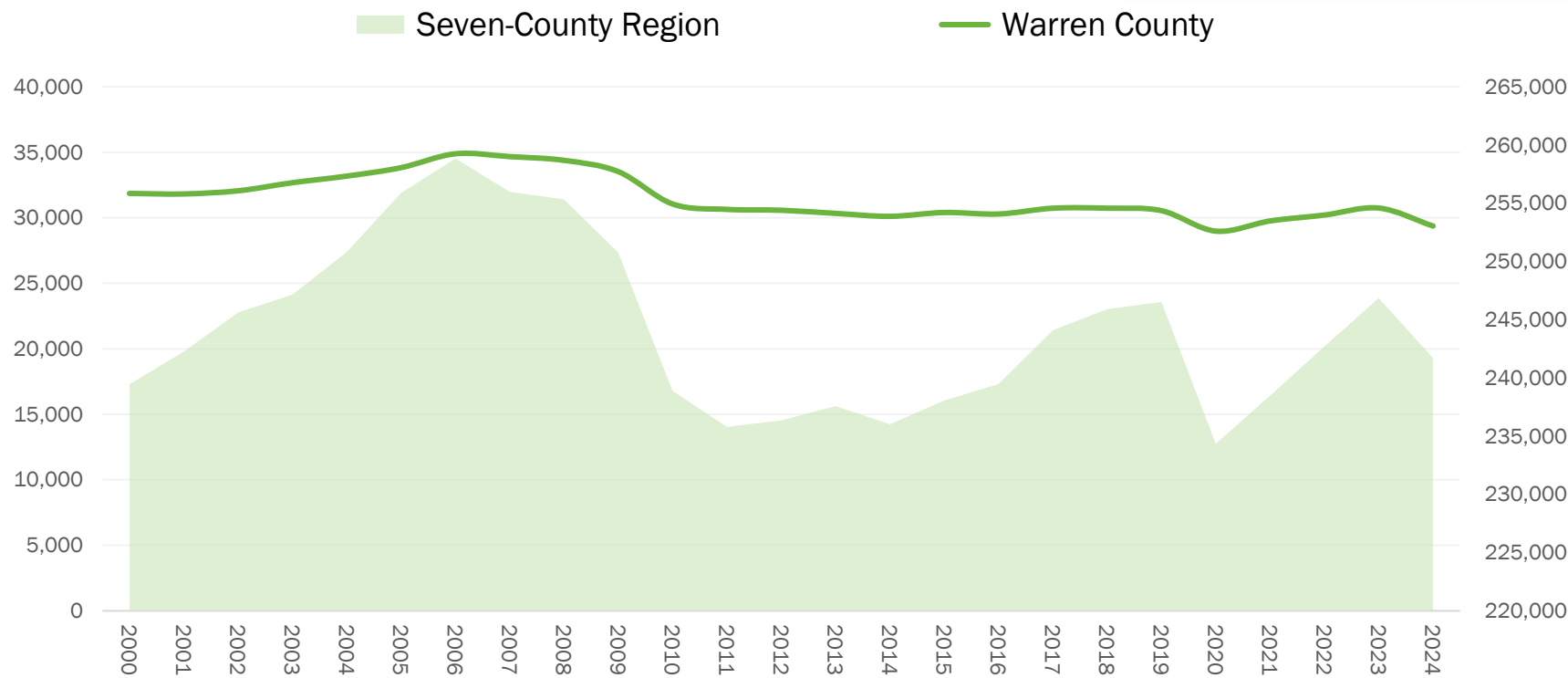
Visitor spending is a critical driver of Warren County's economy. In 2022, the county captured \$859 million in direct tourism spending, with the largest share of this spending associated with lodging (\$437 million or 51 percent of total spending).

Source: Tourism Economics, *Economic Impact Of Visitors In New York 2022: Capital-Saratoga and Adirondacks Focus*, September 2023

Employment Trends: Seven-County Region

Employment Trends: Seven-County Region

Employment in Warren County and the Seven-County Region peaked in 2006 and was at its lowest in 2020, likely owing to pandemic-related impacts.

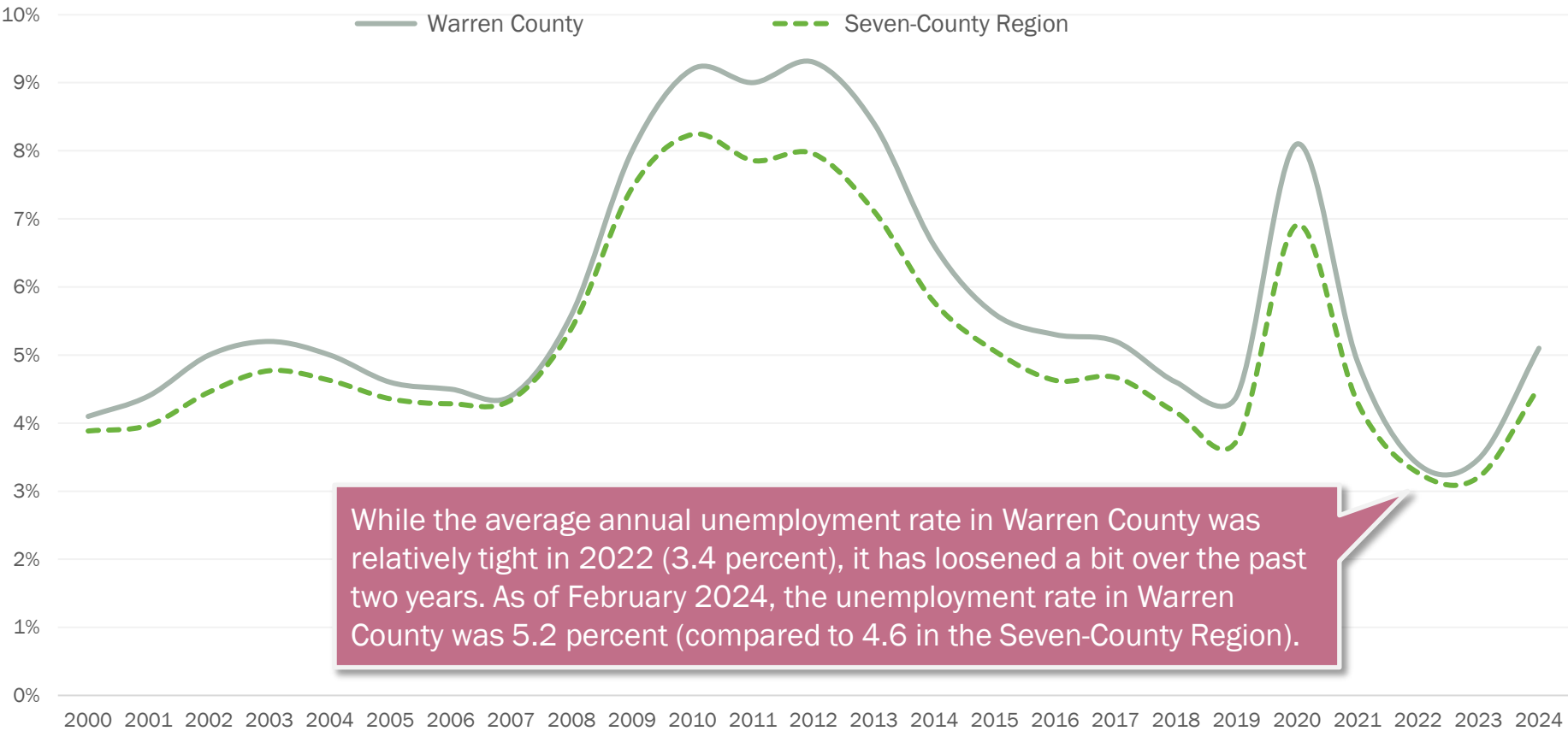


As of February 2024, there were approximately 29,320 jobs in Warren County - 4,310 less than there were in 2006 for the same month.

Note: Non-seasonally adjusted. Average 2024 data is as of February 2024.
Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Unemployment Rates: Warren County

Historical Average Annual Unemployment Trends



While the average annual unemployment rate in Warren County was relatively tight in 2022 (3.4 percent), it has loosened a bit over the past two years. As of February 2024, the unemployment rate in Warren County was 5.2 percent (compared to 4.6 in the Seven-County Region).

Note: Average 2024 data is as of February 2024.
Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

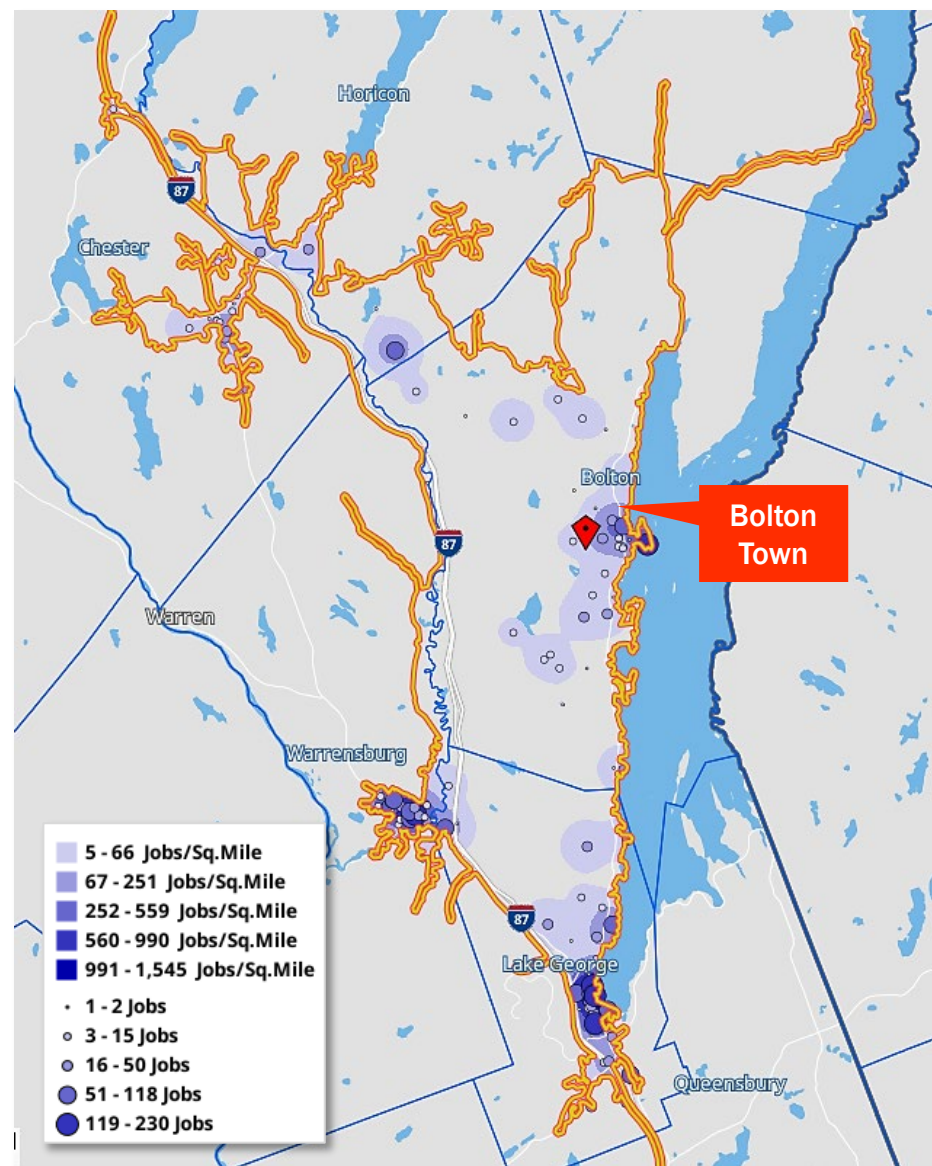
Private Primary Jobs: 20-Minute PMA

Inflow/Outflow Analysis, 2021



A small portion of the 595 primary job workers employed in the PMA but living outside it represent potential unmet housing demand, as a share of these commuting workers (three to five percent) may prefer to live closer to work if adequate housing, affordable to their incomes, were available in Bolton.

* A primary job is the highest paying job for an individual worker.
Source: U.S. Census Bureau, Center for Economic Studies, LEHD



Industry Share by Employment

The accommodation and food services sector is the top industry by primary job employment share in both Bolton and the PMA, representing 45 and 35 percent of total jobs, respectively, in 2021 (compared to slightly more than 11 percent in Warren County). Meeting the housing needs of the workers who underpin the local economy will determine its long-term viability.

Primary Job Share, 2021

	Bolton Town	20-Minute PMA	Warren County	Seven-County Region
Accommodation and Food Services	45.0%	35.1%	11.3%	9.1%
Educational Services	11.9%	11.7%	7.3%	11.9%
Retail Trade	9.6%	15.9%	13.5%	12.0%
Arts, Entertainment, and Recreation	5.8%	1.9%	1.3%	1.8%
Public Administration	5.6%	6.0%	6.0%	5.9%
Construction	5.5%	3.0%	3.8%	6.0%
Professional, Scientific, and Technical Services	3.6%	3.7%	3.6%	4.8%
Other Services (excluding Public Administration)	3.4%	4.5%	3.3%	3.0%
Manufacturing	2.8%	2.3%	10.7%	11.0%
Health Care and Social Assistance	2.5%	6.7%	18.7%	14.6%
Administration & Support, Waste Management and Remediation	2.4%	1.0%	6.7%	4.1%
Real Estate and Rental and Leasing	1.6%	1.5%	0.8%	1.2%
Information	0.3%	0.6%	1.9%	1.1%
Agriculture, Forestry, Fishing and Hunting	-	2.0%	0.5%	1.1%
Mining, Quarrying, and Oil and Gas Extraction	-	0.8%	0.4%	0.4%
Utilities	-	0.4%	0.6%	0.5%
Wholesale Trade	-	0.8%	2.7%	3.7%
Transportation and Warehousing	-	0.6%	1.4%	3.0%
Finance and Insurance	-	1.5%	3.3%	3.4%
Management of Companies and Enterprises	-	0.1%	2.2%	1.4%
Total	100.0%	100.0%	100.0%	100.0%

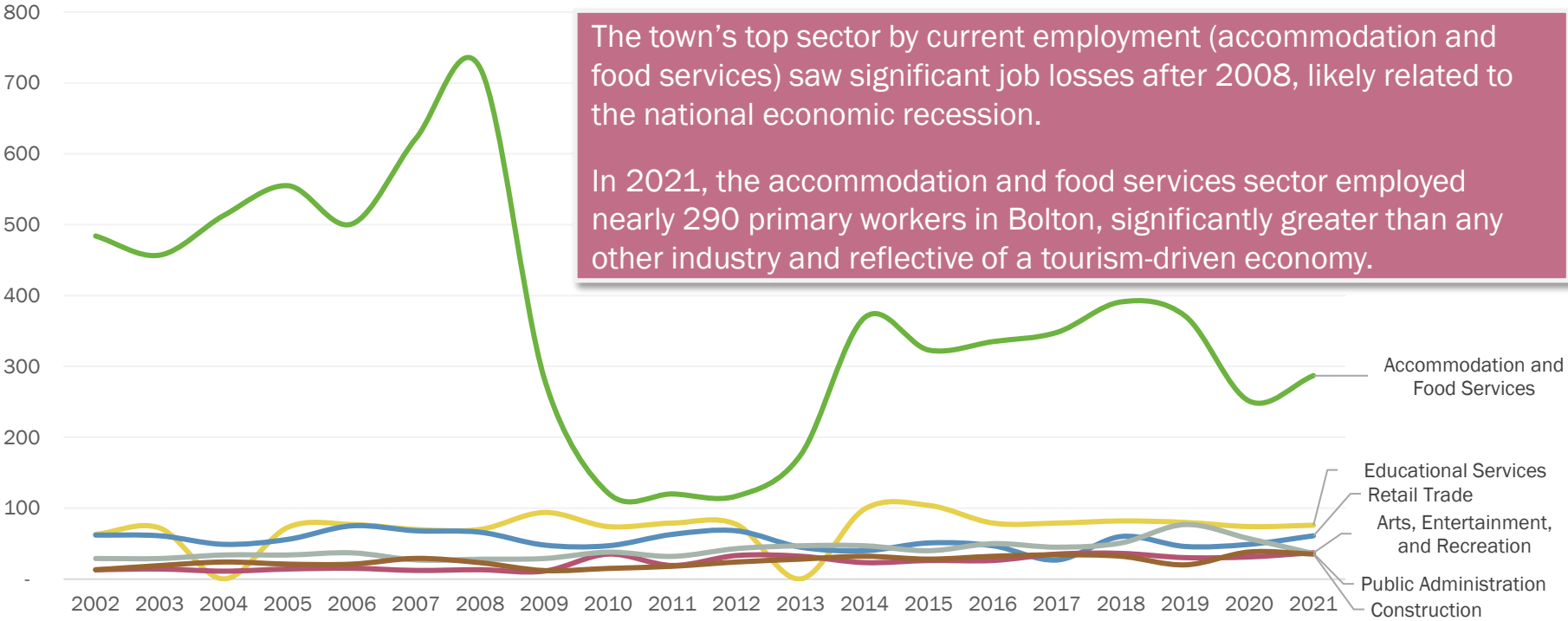
Note: A primary job is the highest paying job for an individual worker. Data for 2021 is the latest year provided for this geography. The top six industries by geography are highlighted in **bold**.

Source: U.S. Census Bureau, for Economic Studies, LEHD

Top Industry Trends: Bolton Town

Top Sector by Employment	Primary Jobs (2021)	Job Change (2002-2021)
Accommodation and Food Services	287	(197)
Educational Services	76	13
Retail Trade	61	(1)
Arts, Entertainment, and Recreation	37	24
Public Administration	36	7
Construction	35	22

Jobs Trends by Top Six Industry Sectors: Bolton Town, 2021

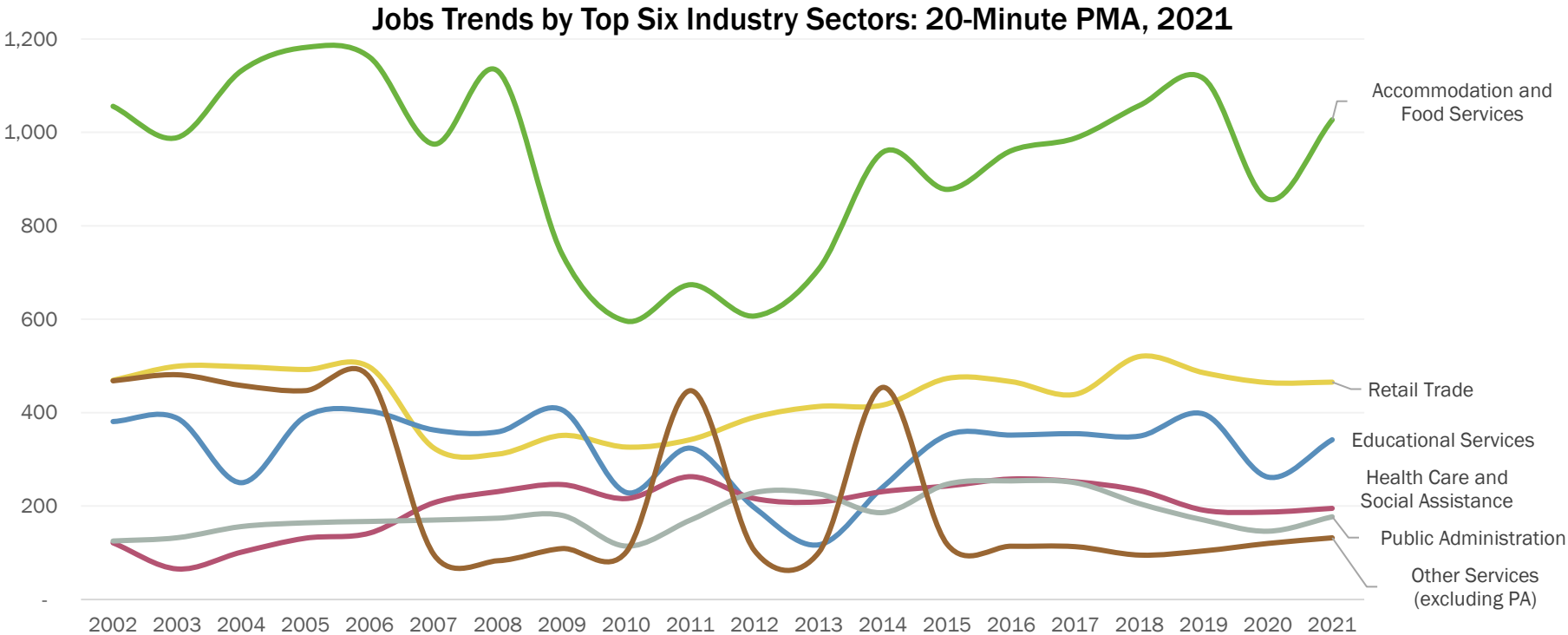


Source: U.S. Census Bureau, for Economic Studies, LEHD

Top Industry Trends: 20-Minute PMA

Four of the PMA’s top six sectors by current employment experienced some job losses over the past two decades. Notably, in 2021, the accommodation and food services sector employed nearly 1,027 primary workers in the PMA.

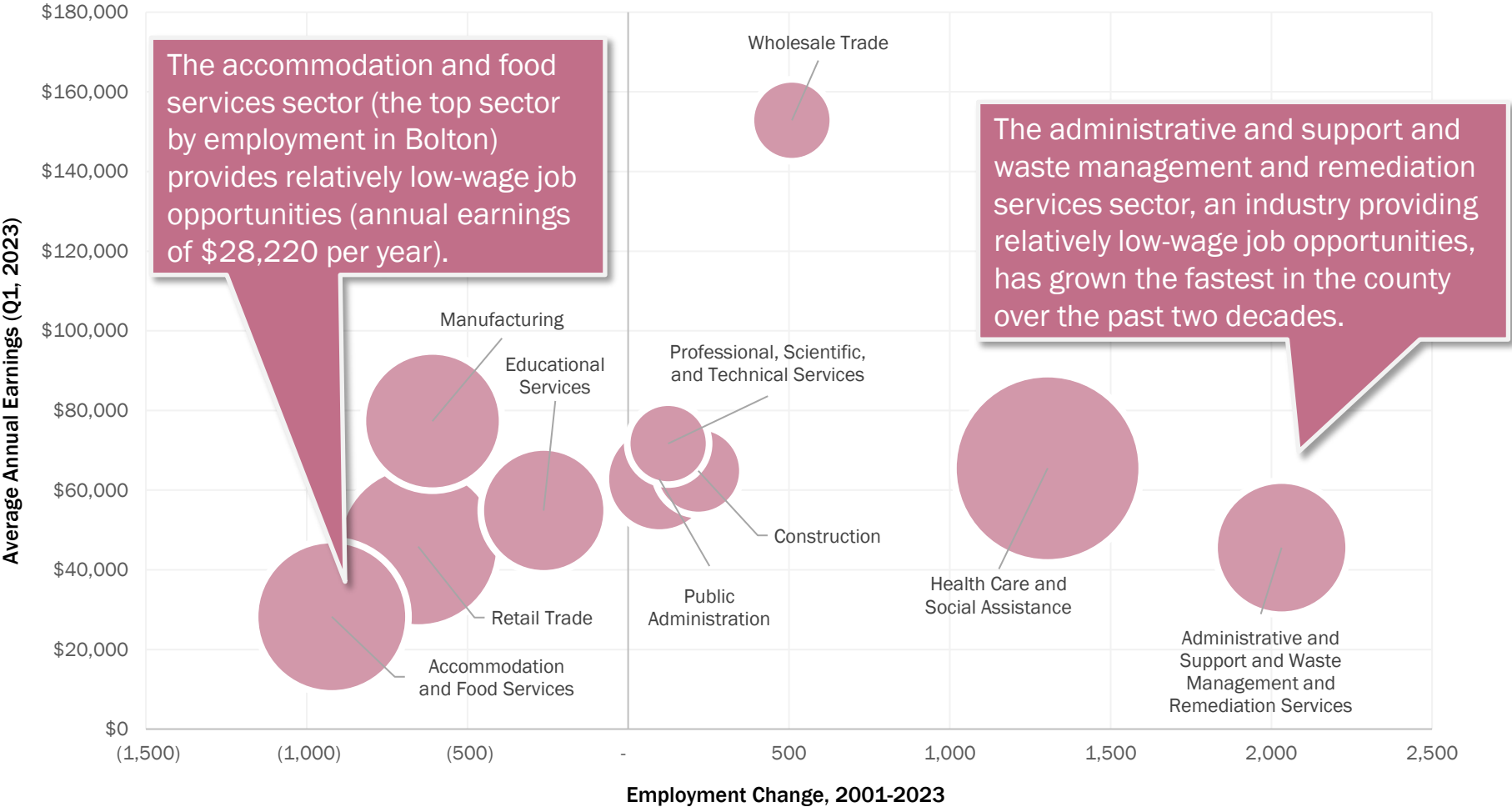
Top Sector by Employment	Primary Jobs (2021)	Job Change (2002-2021)
Accommodation and Food Services	1,027	(29)
Retail Trade	465	(4)
Educational Services	342	(39)
Health Care and Social Assistance	195	74
Public Administration	177	52
Other Services (excluding Public Administration)	132	(336)



Source: U.S. Census Bureau, for Economic Studies, LEHD

Top Industries by Earnings: Warren County

Top Six Industries by Total Employment



Note: Bubble size represents average 2023 employment.
Source: U.S. Census Bureau, for Economic Studies, LEHD



For more information, please contact:

Todd Poole
646.383.3611
tpoole@landuseimpacts.com