

PORT OF ROCHESTER Master Plan

SASAKI
ZHA, INC.

DRAFT



Contents

EXECUTIVE SUMMARY	1	Transportation and Parking	27
1. INTRODUCTION AND GOALS	3	Transportation	27
Purpose of the Study	3	Trip generation	27
Development Goals	3	Parking	27
2. SITE AND MARKET ANALYSIS	5	Infrastructure	28
Historical Context	5	Roads and Streets	28
Regional Context	7	Utilities	29
Neighborhood Context	9	5. IMPLEMENTATION	30
Site Opportunities and Constraints	10	Private and Public Investment	30
Market Analysis	11	Project Costs and Financial Model	30
3. MASTER PLAN OVERVIEW	13	Project Phasing	31
4. DEVELOPMENT COMPONENTS	21	Permitting and Approvals	31
Housing	21	Development Controls	32
Townhouses	21	Zoning	32
Apartments	21	Design Guidelines	32
Retail	22	APPENDIX	
Office	23	Appendix A - Development Layout Option B	A1
Terminal Building Reuse	24	Appendix B - Market Analysis and Opportunity	A3
Marina	25	Appendix C - Zoning Review and Amendments	A29
Open Space	26	Appendix D - Design Guidelines	A31
Streetscapes	26	Appendix E - Project Permitting	A37
Parks	26	Appendix F - Cost Estimate	A39
		Appendix G - Financial Feasibility	A41
		Appendix H - Reuse of the Terminal Building	A49
		Appendix I - Traffic and Parking Analysis	A55
		Appendix J - Public Process and Input	A59
		Appendix K - Contributing and Prior Studies	A71

FIGURES

Existing Site Photos 2

Project Site Limits 3

Historic Maps 4

Historic Photos 5 - 6

Regional Context Maps 7

Existing Land Uses 8

Zoning Diagram 9

Existing Utilities Diagram 10

Community Photos 11

Views and Viewsheds Diagram 12

Opportunities Diagram 12

Constraints Diagram 12

Transportation Diagram 13

Overall Master Plan 14

View South from Ontario Beach Park 15

The Marina and Ontario Beach Park 16

Beach Avenue Extension and Lake Avenue 16

Genesee River Promenade 16

View from Lake Avenue Bridge 16

The Marina and Town Green 17

View from West to East 17

Typical View Corridor to Genesee River from Lake Avenue 17

Perspective view 18

Section A-A: Typical Residential Street 19

Section B-B: Typical Alley 19

Section C-C: Typical Section at Retail 19

Section D-D: Typical Street at Marina 19

Section E-E: Marina and Town Center 20-21

Section F-F: Lake Avenue to Genesee River Promenade 20-21

Section G-G: Lake Avenue to Marina 22

Highlighted plan – Housing 23

Housing types diagrams and typical block configurations 24

Highlighted plan – Retail 25

Highlighted plan – Office 25

Preferred Scenario First Floor 26

Preferred Scenario Second Floor 26

Highlighted plan – Marina 27

Highlighted Plan - Public Open Space 28

Parking Diagram 29

Circulation Diagram 30

Funding source diagram 32

Phasing diagram – Large block scenario 33

Program statistics 34

TABLES AND GRAPHS

Housing count statistics 23

Retail statistics 25

Office statistics 26

Green Space statistics 28

Trip generation 29

Parking distribution 29

Graph: Parking demand on a typical weekday 30

Projected Domestic Water/Sanitary Sewer Demand 31

Probable Development Costs 32

Executive Summary

The 30 acre Port of Rochester development parcel is located adjacent to the confluence of the Genesee River and Lake Ontario. It is an exceptional parcel of land. Since the mid 1880's this site's unique location and physical characteristics has provided varying degrees of opportunity for industrial and maritime activities. Today this land parcel still provides the City of Rochester with an international gateway onto Lake Ontario. Now it is time once again to plan this site for a new land uses based on current and near future market demands. Because the site is so valuable and diverse, we believe the new land uses proposed in this document will be central to the economic and community regeneration of the whole of the City of Rochester and add year round vitality to the Charlotte Neighborhood.

The Sasaki Planning and Design Team was asked by the City of Rochester to study this site and to prepare a comprehensive Master Plan. The plan would address current and future market demands for the greater Rochester area, be compatible with the existing Charlotte community and complement the adjacent uses on the Genesee River in the Town of Irondequoit. Accordingly, a detailed market study was conducted, key stakeholders were interviewed and numerous public work shops were held with the community to solicit input. Work sessions were also held with local developers to determine their level of interest in this site and to verify the findings of the market study.

The planning team studied a variety of potential uses. These ranged from hotel/hospitality and recreational developments to active port uses and finally, residential mixed use development based on the design principles of New Urbanism. The planning effort synthesized all of the community and stakeholder input with the market analysis. The result is a master plan for a mixed use waterfront community which is an extension of the existing Charlotte neighborhood. It will contain a variety of housing types, associated commercial / retail use, marine use, institutional use and limited professional office

space. Active recreational use will continue to be one of the strong attractions of the area as it continues to offer a large variety of amenities to the local community and the City of Rochester at large. These range from, passive and active recreation uses such as walking, jogging, beach going, boating and picnicking in Ontario Beach Park, to potential future new ferry operations associated with the existing facility on the Genesee River.

Because of the site's location at the confluence of the Genesee River and Lake Ontario it is and should remain an international gateway. To facilitate this, a portion of the existing terminal building should be reserved for a possible passenger ferry service in the future. Even with this reserve of space, the existing port building has ample room to accommodate a variety of uses. The building's prominent location at the edge of the Genesee River, in combination with a range of new uses will make it an iconic landmark within the expanded Charlotte community.

The proposed Master Plan program includes a diverse mix of uses. The size of each of these land uses has a degree of flexibility built into the plan. This gives room to make adjustments to the land use mix in response to changing market conditions as the development project is implemented over a 5 to 10 year period.

The key highlights of the proposed uses are:

- Residential housing, mixed variety 395 - 700 units
- Commercial / Retail, up to 80,000 sq ft.
- Educational / Institutional, 24,000 - 27,000 sq ft.
- Port / Marine, future passenger ferry and 100 boat marina
- Office, 6,000 sq ft.
- Recreation
- Public parking

For the housing, current market trends suggest a higher percent-

age mix of apartments, condominiums and multi family units and less of town houses. The commercial uses would be comprised of eating and drinking establishments, convenient stores, cafés, drug-stores and the like. Educational / Institutional use could be SUNY Brockport Great Lakes Research Center or similar uses. Port and marine uses could be a continuation of future passenger ferry to Toronto and a 100 boat public marina to accommodate the greater City of Rochester boating needs of permanent and transient docking spaces. Office space will be prominently located in the existing port building second floor space. Recreation use will be available throughout of the entire development, by maintaining public access along the entire water edge of the Genesee River, the propose marina basin, the village center park and all community pocket parks. Direct linkage between public promenades within the project and the harbor entrance walkway along the jetties will be maintained and should be enhanced for a better and safer experience.

Due to current market conditions, the diversity of the proposed mixes and the rigorous regulatory process to obtain the necessary approvals prior to commencing with development, this parcel of land will most likely be developed in multiple phases. The exact makeup of the initial and subsequent phases will be determined by the appointed development team, who will be responsive to market demand and with direct input from the City of Rochester and the various regulatory approval agencies.

Regardless of which process the development follows, the ultimate build out will be positive and will have remarkable effect on transforming this great parcel of land into a vibrant and diverse new community.



Existing Site Photos

Introduction and Goals 1

PURPOSE OF THE STUDY

The City of Rochester owns a parcel of approximately 30 acres at the mouth of the Genesee River adjacent to the Ontario Beach Park. The parcel has been used for a variety of purposes over time; most recently it has served as the site of the fast ferry terminal between Rochester and Toronto, Ontario, Canada. The City has long been interested in redeveloping this site into a more productive purpose than its current primary use, parking to support the ferry terminal and the seasonal use of the beach. The purpose of this study is to evaluate possible uses for the site and make recommendations on how best to redevelop it. This Master Plan is intended to become the City's blueprint to guide future investment in their redevelopment efforts.

DEVELOPMENT GOALS

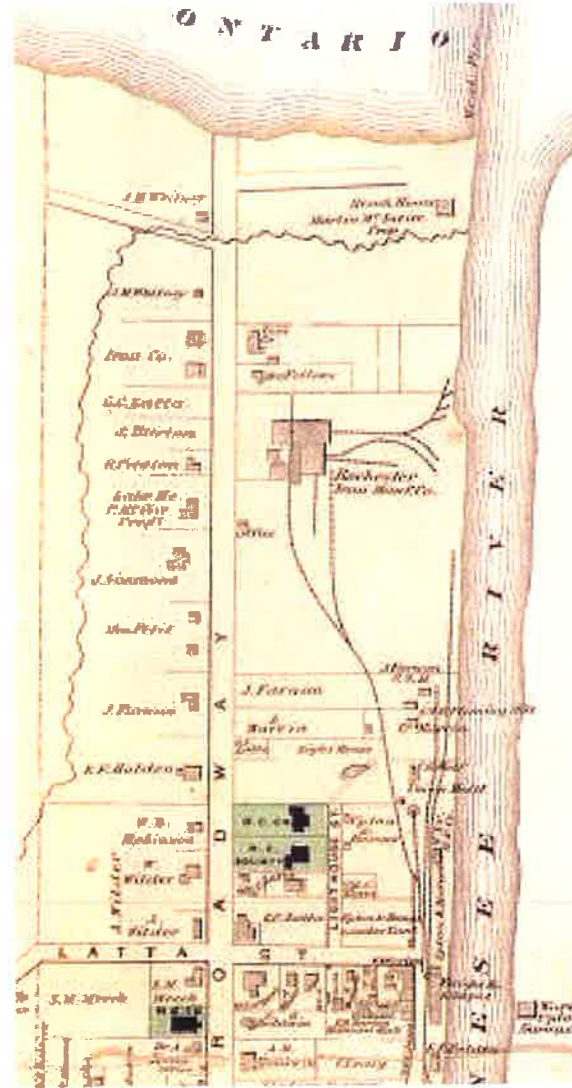
The Port of Rochester site has been the subject of a number of prior studies, including the Charlotte Harbor Area/Port of Rochester Local Waterfront Revitalization Program, the Rochester Renaissance Plan and a visioning workshop for Charlotte. These different processes produced consistent goals for the redevelopment of the port site, and have been adopted as part of this study. These goals include:

- Preserve and enhance the village character of Charlotte
- Create a family-oriented, four-season development
- Maintain and enhance visual and physical access to the water
- Improve access into and out of the Port area
- Enhance business activity within the harborfront village
- Improve the walkability and pedestrian safety of the area
- Protect and enhance the environmental, historic and cultural resources of the area

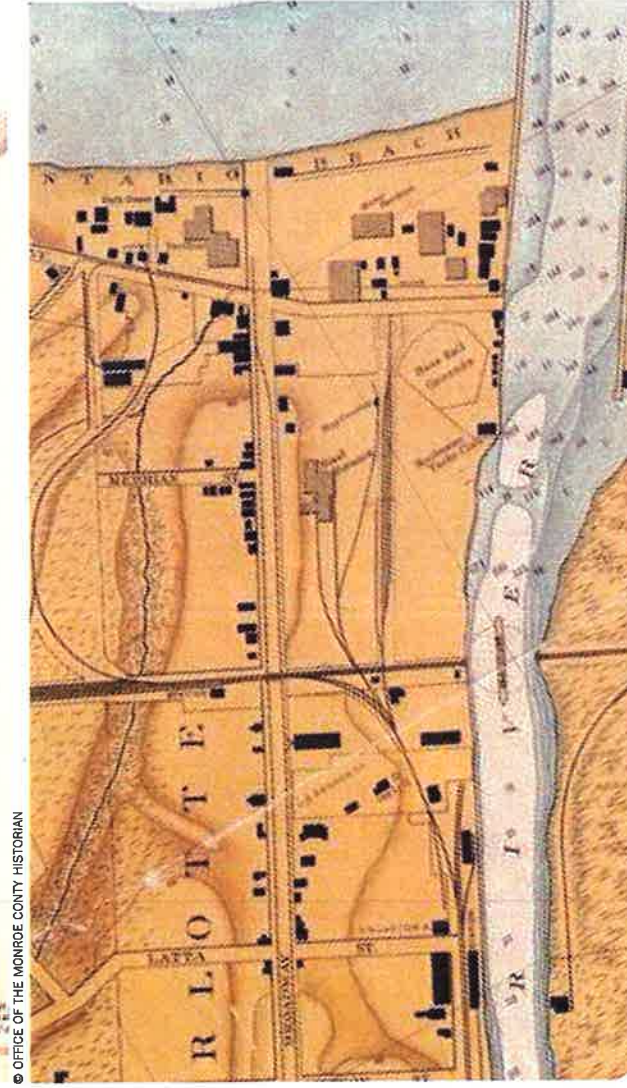
An additional goal identified in these studies was the creation of an international tourist destination, building on the presence of the fast ferry service to Toronto as a source of visitors from both Canada and upstate New York. With the ferry service shutdown in January, 2006, achieving this goal has become more difficult. The study has evaluated additional options to bring in a regional tourist trade, and found very limited potential for success. The study team therefore focused on other options for developing the year-round community established as a primary goal for the site and area.



Project Site Limits



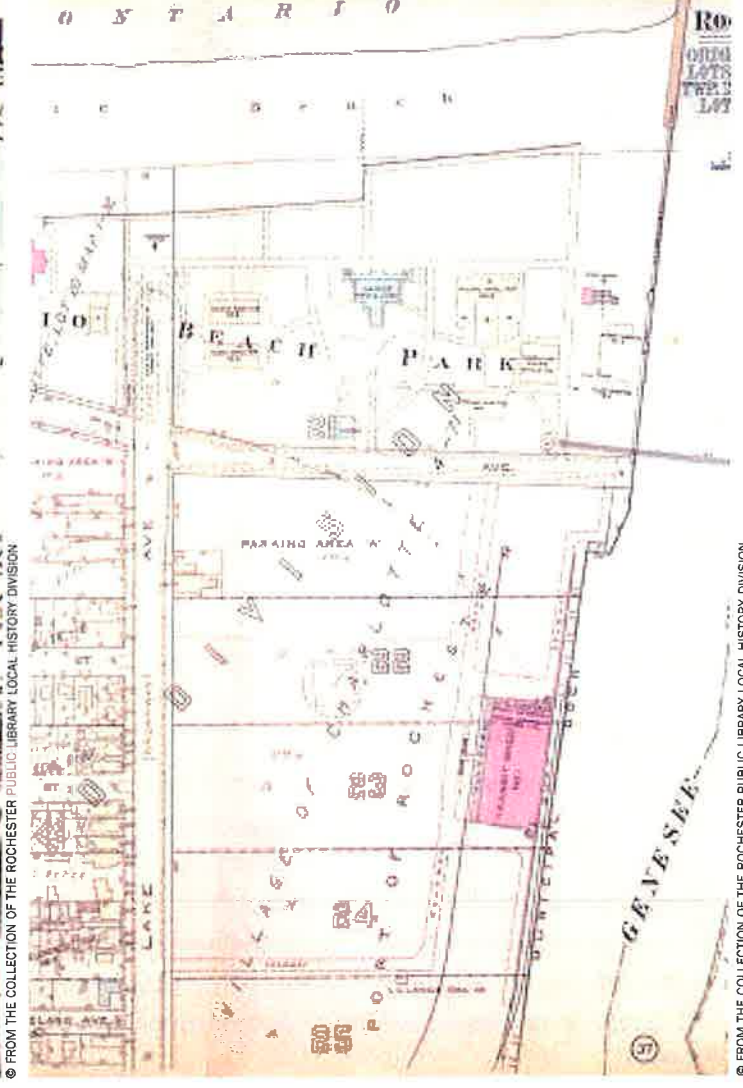
1872



1909



1926



1936

Site and Market Analysis ²

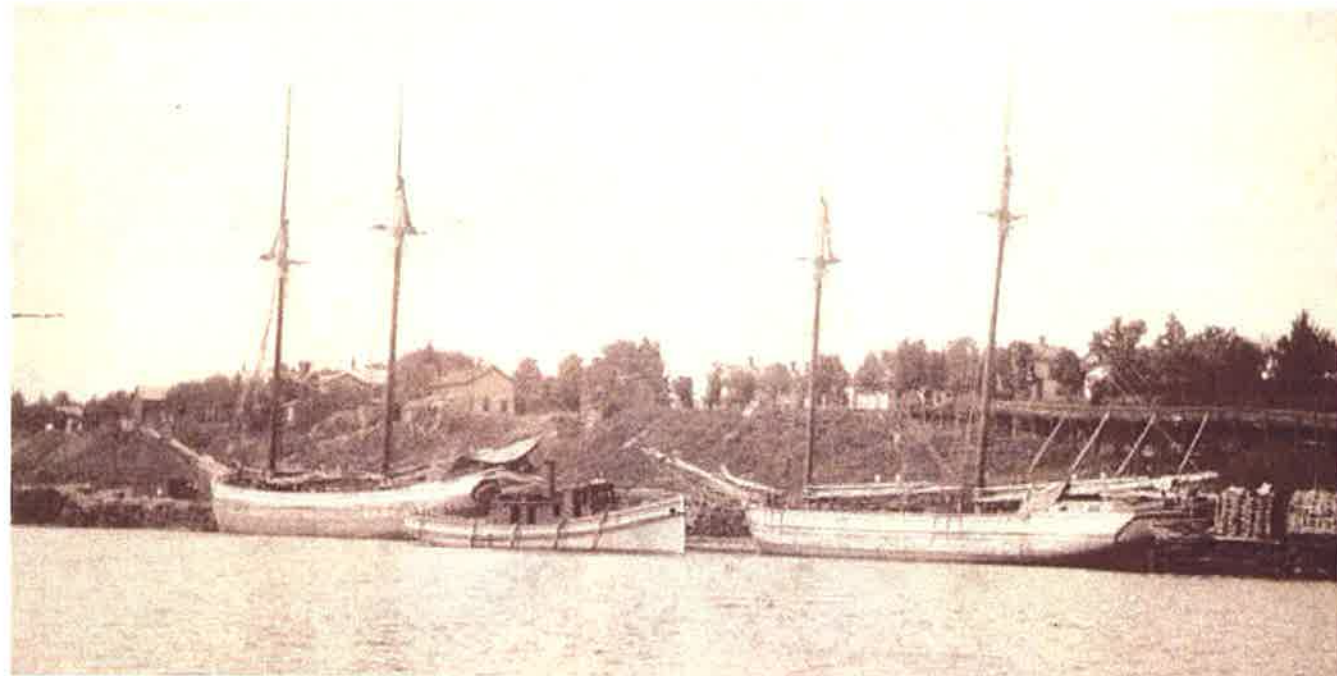
HISTORICAL CONTEXT

Over its history, the study site has been used for a variety of purposes. In the mid-19th century, it served as the home to a carnival and amusement park, including roller coasters, a midway and baseball fields. The river and lake provided the desirable commercial and recreational venues of a beach and a waterfront environment for strolling. At the same time, the area served as a stop on the Underground Railroad, bringing slaves from farther south for travel to Canada and freedom. Around 1870, a portion of the site was converted to an iron manufacturing plant, with a blast furnace that made pig iron for other fabricators in the Rochester area. Again, the river/beach setting provided easy access for shipping to bring iron ore and other raw materials to the plant, and to ship product out. An extensive network of railroad facilities, including multiple tracks and a turntable, were also constructed to support the movement of goods and materials for the factory. The blast furnace was initially very successful, but started to struggle in the late 1800's, operating on an intermittent basis until it was permanently shut down and dismantled in the 1920's. The site then became a shipping facility, loading and unloading materials destined for Toronto and other cities on both sides of Lake Ontario. The rail network first established to serve the blast furnace helped support this use, as one of the primary exports was coal. A terminal building was constructed on the site in the 1920's to facilitate the lake shipping trade and passenger travel through the port. Trade through the port followed increases and declines with the wars of the early 20th century. Primary cargoes for the port were coal and touring cars with passengers bound for Toronto and other Canadian ports. With the development of the roadway and railroad networks around the western end of the lake, both of these trades slowly tapered off. Passenger and car ferry service ended in the late 1940's and freight continuing but at very low volumes into the 1950's.

It was in this same post World War II time frame that the current use of the port as a marina for pleasure craft started to develop. The Coast Guard estimated the total number of private pleasure boats on the river at 900 in the early 1950's. The terminal continued to be used for imports of newsprint and cement and exports of coal, but trade continued to slow through the 1950's and 1960's.



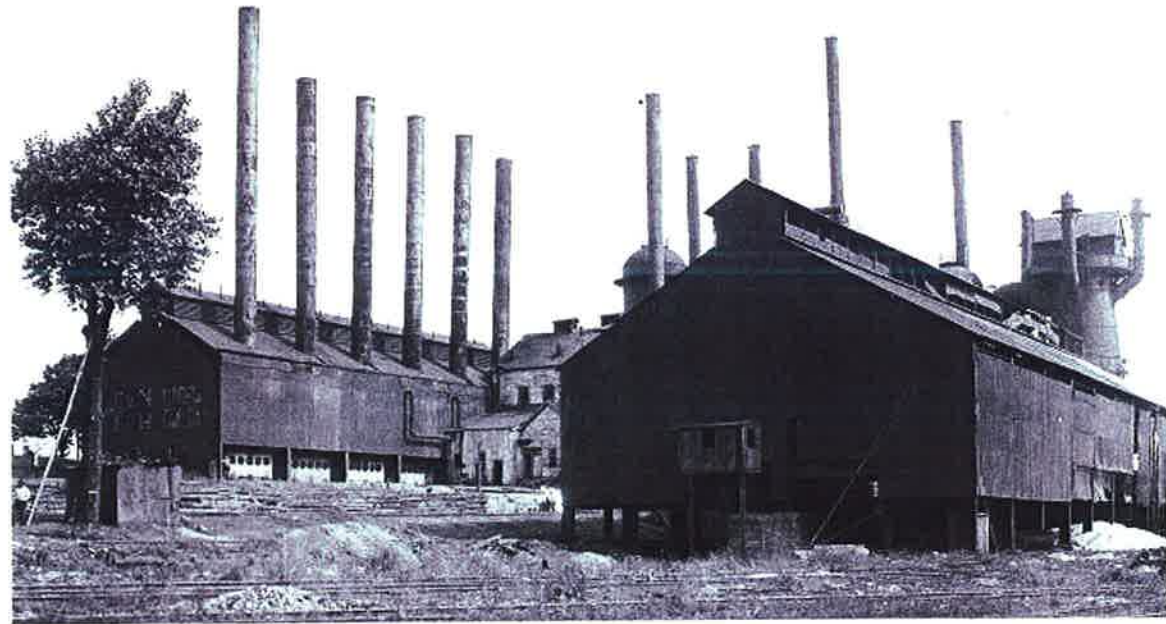
Ferry terminal at Charlotte 1910 - 1915



Lumber schooners at Charlotte c 1890

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Blast furnace exterior

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(above) East Facades 1920

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(left) Charlotte Genesee lighthouse

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The Breezer 1920

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Ontario Beach Park

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Ontario Beach in early 1900's

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The conversion of the port to support a high-speed car ferry began in 2000 with the reconstruction of the terminal building as a passenger terminal, including extensive customs facilities for walk-on passengers and vehicle processing. Ferry service to Toronto was initiated in June of 2004. In 2005 the ferry was operated by the City of Rochester. Ferry operations ceased in the January 2006.

REGIONAL CONTEXT

The Port of Rochester site is located roughly seven miles north of downtown Rochester. Approximately 400,000 people live within ten miles of the site, which includes the majority of the Rochester metropolitan area. The population within 100 miles of the site is approximately 2.6 million; this area includes the metropolitan areas of Buffalo (70 miles to the west) and Syracuse (70 miles to the east). Regional access is provided by the interstate highway system which connects to limited access highways that bring traffic within a half-mile of the site. The Rochester Transit Authority provides bus service from the site to downtown; there is no rail or boat service providing public transportation to the site.

The Port of Rochester lies at the end of a strip of annexed land on both banks of the Genesee River between downtown Rochester and the lake. The Port site and its immediate environs provide the only access to the lake within the corporate limits of Rochester. This location creates the opportunity for many services that are unique to the region: Ontario Beach Park and Durand Eastman Beach are the only public swimming beaches in the vicinity of Rochester. The Genesee River provides marina services with immediate lake access to the western Rochester area; other marinas are typically at the southern ends of bays and inlets along the lakeshore, moving them well inland from the lake itself.

As the site is bordered on the north by Lake Ontario, most services needed by the residents of Charlotte are to the south of the development site. There is small-scale retail immediately adjacent to the site, but large regional shopping centers are clustered in Greece (to the south and west of the site) and Irondequoit (across the river and to the south and east), as well as in downtown Rochester. Likewise, major employment centers are nearer to downtown and on the south side of the downtown core.

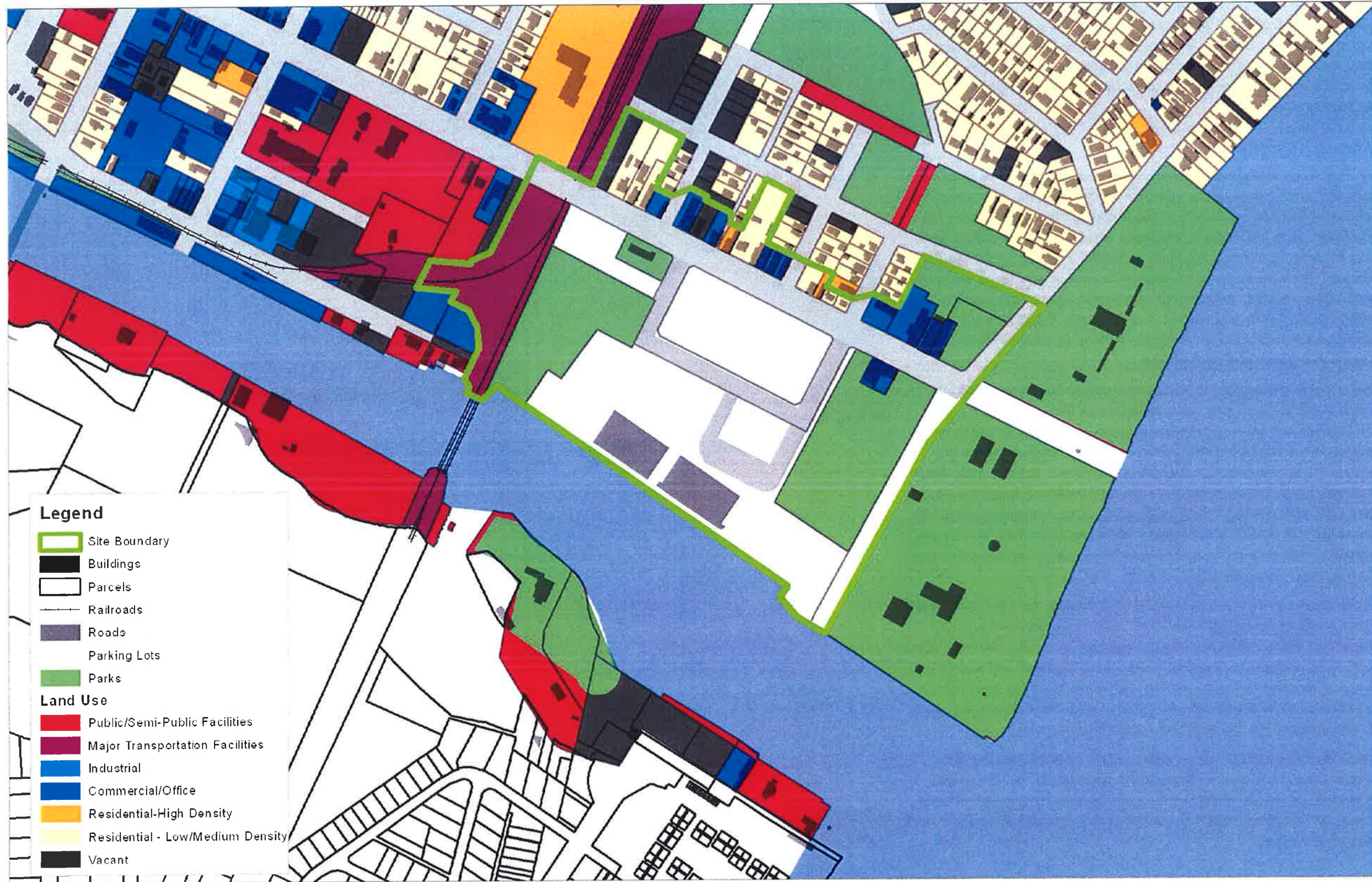
While Canada is only 50 miles across the lake from the site, the influence of Canadian trade is limited with the cessation of the ferry service to Toronto. There is a small amount of private boat traffic back and forth across the lake, but it does not have a significant impact on retail and business opportunities.



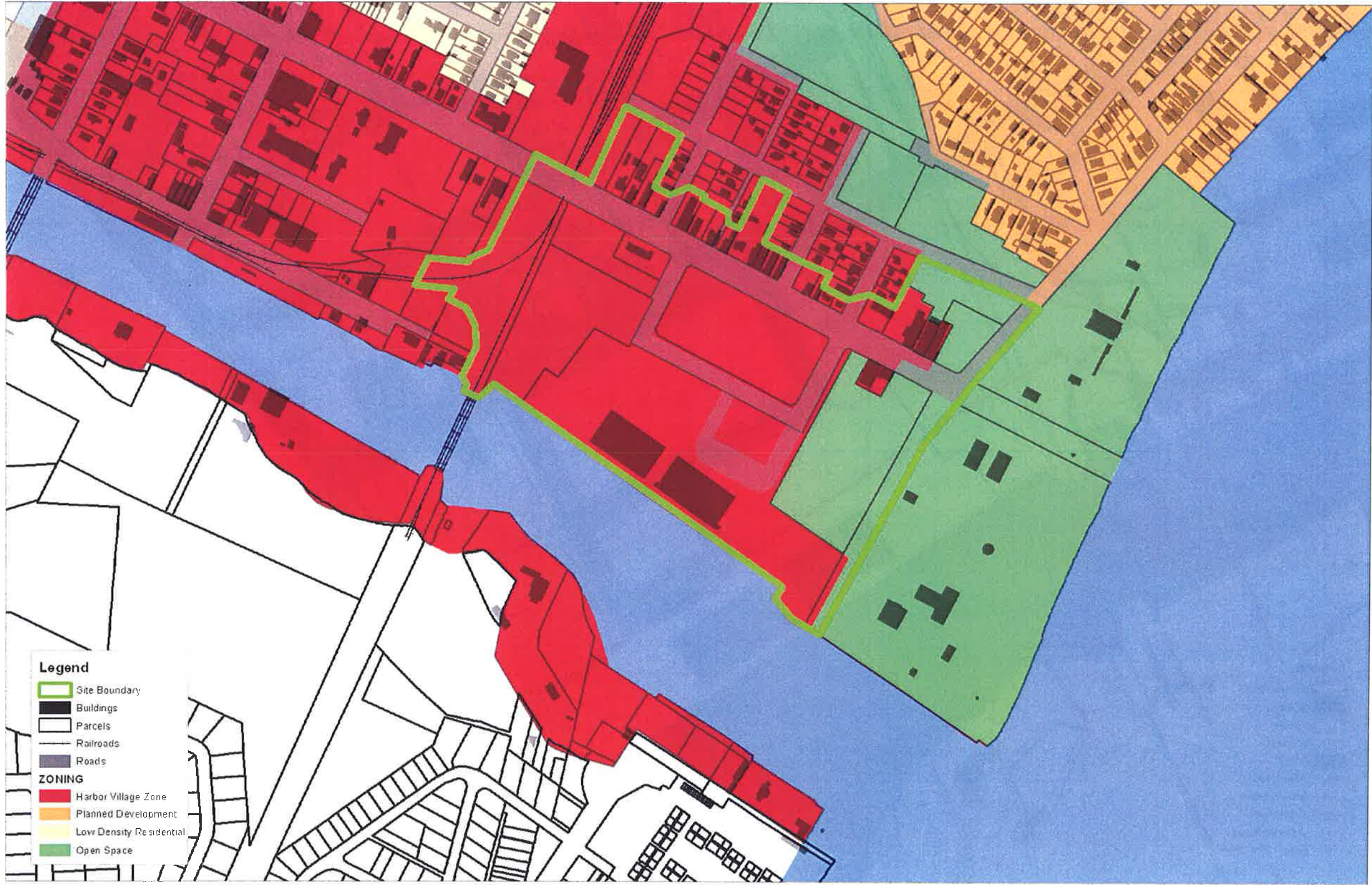
Regional Context Map – Statewide



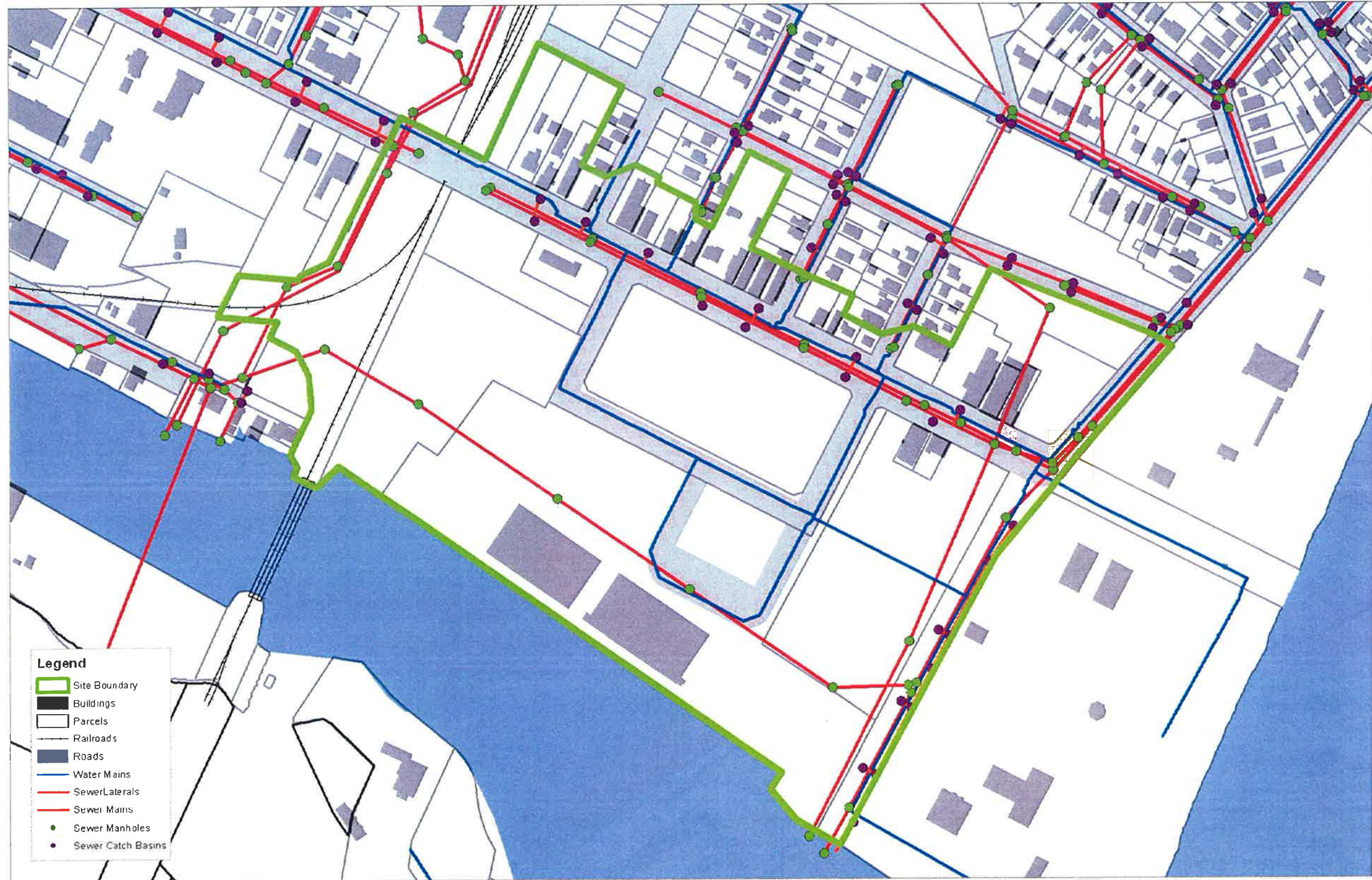
Regional Context Map – Rochester Area



Existing Land Uses



Zoning Diagram



Existing Utilities Diagram

NEIGHBORHOOD CONTEXT

The Port of Rochester site lies within the community of Charlotte, formerly a separate village that was annexed by Rochester in 1916.

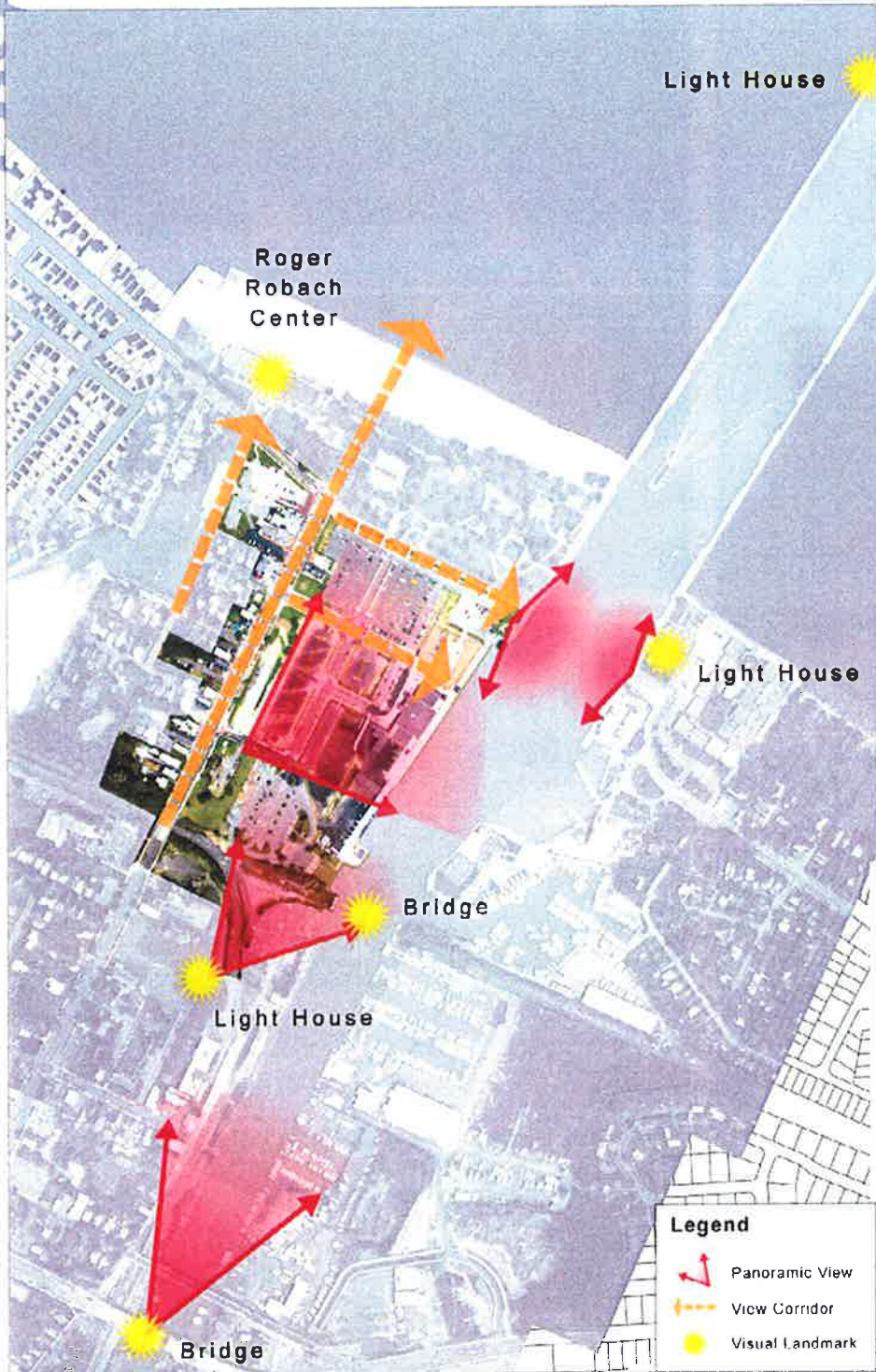
The site is bordered by different land uses on each side. To the north lies Ontario Beach Park, with an expansive sand beach that is heavily used in the summer months, as well as an historic carousel, band stand, and picnic shelters. The band stand is host to a Wednesday evening concert series in the summer. There is also a large community center within the park. The eastern border of the site is the Genesee River, the opposite bank of which is home to a series of marinas and yacht clubs that house as many as 900 boat slips. The site's immediate southern edge is the former CSX rail right-of-way, now abandoned except for a single track that carries coal to a nearby power plant. Beyond the rail line is a collection of light industrial properties, concentrated along the river and rail line. The original Genesee River light house, built in 1822, overlooks the site from a bluff south of the rail corridor.

The western edge of the Port is defined by Lake Avenue, which connects the site and Charlotte to downtown Rochester along the Genesee River. The eastern side of Lake Avenue is undeveloped, with the exception of two single-story restaurants north of Corrigan Street. Lake Avenue is developed on its western side with older two and three story structures, mostly wood-frame residential buildings, which have been converted to retail stores, restaurants and bars over the years. Behind the buildings fronting Lake Avenue are residential properties. These properties front the cross streets of Lakeland, Fleming, Hincer, Corrigan, and Estes Streets, which run parallel to Lake Avenue. This residential community is separated from a larger residential area by an active recreation park that borders the western side of Estes Street.

The community of Charlotte maintains a strong identity among its residents and throughout the Rochester metropolitan area. Charlotte has an active community association that promotes its image and identity very effectively. The village plays host to a number of events and festivals throughout the year, and is frequently visited for its various attractions by many from Rochester and beyond. The community also maintains a strong sense of its history, through a local historical society and many points of historical interest, such as the Charlotte Genesee Lighthouse.



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Views and Viewsheds Diagram



Opportunities Diagram



Constraints Diagram



Transportation Diagram

SITE OPPORTUNITIES AND CONSTRAINTS

The greatest asset of the site is its location near the mouth of the Genesee River and the Lake Ontario shore. This location provides good physical access to boating and other water-oriented activities. The context of existing and proposed marinas and mature vegetation of Ontario Beach Park create an ambiance that will be desirable to potential residents and visitors to the development. The proximity to the park also creates a recreational and entertainment amenity to the site: the park includes swimming supported by a large bathhouse; basketball and beach volleyball courts; a bandstand that supports a regular summer concert schedule; a historic carousel; and picnicking and passive recreation facilities. A strong connection between the park and the development, particularly as a visual amenity, has been one of the most important issues for participants in the public meetings.

Transportation into and out of the site is one of the problems that must be resolved in advancing the development plans. The site is currently fed primarily by Lake Avenue, which can become a restriction for access during peak times (festivals and summer concerts at the beach). There are several opportunities to address this, particularly the development of River Street that can be used to re-route traffic around the Lake Avenue railroad crossing, usually the choke point in traffic movements. Also, greater use of Beach Avenue and its connections to the Lake Ontario State Parkway and Route 390, possibly combined with improvements to Estes Street to take traffic off Lake Avenue, can be used to mitigate the overall traffic picture. In the long term, there are opportunities to use the railroad corridor heading south along the river and west towards Greece as a transportation link, either through the development of bike and walking trails within the right-of-way or for some form of public transportation.

One of the greatest issues facing development will be dealing with the geotechnical and geological conditions of the site. The industrial uses during the late 1800's and early 1900's deposited a layer of slag across much of the site, ranging in depths from two to ten feet. This material is not considered a restriction to redevelopment, but its placement will be controlled (it must be placed with sufficient cover to isolate it), and removal from the site will require handling as a contaminated soil. The site's geology will also place limits on the structures to be developed: the soils will only support four to five stories of wooden-framed construction on spread footings; depth to bedrock is generally in excess of 100 feet, making pile-supported construction expensive.

MARKET ANALYSIS

As a part of the master plan process for the Port of Rochester, existing reports and documents were reviewed and interviews and site visits were conducted. In addition, published data was analyzed to assess the viability for residential, retail, office, hospitality uses and recreational boating.

Market studies use both quantitative and qualitative data to gauge what can be reasonably supported in a given area. Using the research, a likely trade area for each use was determined, the supportable square feet in the given trade area was calculated, and then a likely capture rate for the uses that would locate at the Port was projected. This assessment of area economic conditions found that the Port site could reasonably support the following:

Residential:	1,126 new units
Retail:	General retail 17,000 sf Convenience retail 28,000 sf Eating and Drinking 33,000 sf
Office:	51,000-76,000 sf
Hotel:	Limited opportunity for boutique/condo hotel
Destination Use:	Very limited opportunity

These amounts are projected to be supportable within the next 5-7 years, with known data at the time of this report and without the introduction of additional extraordinary circumstances that would change the given market.

The full market analysis is included as Appendix B to the Master Plan Report.

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Master Plan Overview 3

The Master Plan envisions a moderately dense mixed use development to create a lifestyle community to enhance the Charlotte community focused on the waterfront and marina components. The development would feature housing in a number of different configurations and price ranges with supporting small-scale retail and office space. The variety of the site provides a broad range of settings for the housing as well: from urban street units along Lake Avenue to quieter, internal sites along the main north-south streets, abutting the river and the marina. There is enough variety to satisfy almost any potential resident. With careful planning, and using the site's natural topography, it should be possible to configure the housing such that many units will have water views of either the river or the lake.

The site is organized around a series of blocks that respond to the existing street grid in the immediate area of the development. These blocks form the basic structure of the plan and provide opportunities for flexibility within the overall development. The street grid responds to both the alignment of Lake Avenue and the Genesee River, using the divergence in their alignment to create greater interest in the overall development. Within the block structure, the developers may organize and place dwelling units to respond to the market, the specific block within the development, and other factors that may influence the cost, form, and marketability of the units.

The major organizing elements of the site are its system of open spaces, including the marina and town green. These features create vistas across the development that allow connections to the river, Ontario Beach Park, and the marinas and other development on the east bank of the river create a more interesting visual environment and making the project seem larger than its limited footprint. These features also create value in the development, providing valuable amenities and desirable housing sites.

The plan is focused on creating a walkable pedestrian community. The design, proportions and amenities of the streets are created to invite people to walk from destination to destination within the development. All streets are created with comfortable tree-lined sidewalks, and internal pedestrian paths link destinations. Lighting will be in scale with the



View South from Ontario Beach Park



The Marina and Ontario Beach Park



Genesee River Promenade



Beach Avenue Extension and Lake Avenue



View from Lake Avenue Bridge

pedestrian environment while providing adequate illumination for night-time comfort of both pedestrians and motorists.

The placement of retail space and the anticipated retail mix also look to create destinations, allowing daily shopping needs to be met by convenient walking trips rather than driving. This approach will reduce the volume of cars on the streets, the amount of traffic entering and leaving the development, and the number of parking spaces required within the development to support both the retail and residential functions.

The relationship of the development to its edges was also carefully considered in the preparation of the master plan. Buildings along Lake Avenue will relate to the uses and scale of the existing buildings on the west side of the street. Retail uses are initially concentrated at the northern end of the street, where there is currently a higher concentration of retail activity, and where it can draw on users of the beach. The residential units along Lake Avenue should be designed to be converted to retail uses in the future, as retail demand increases. The openness of the site along the southern edge of the Ontario Beach Park created by the marina provides a buffer to the park, visually extending it into the development to the town green in front of the terminal building. On the southern edge of the site, the placement of the apartment structures provides an opportunity to address and soften the embankments of the railroad corridor while still maintaining openness and visual access to and from the historic lighthouse.

One fundamental assumption of the proposed development is the conversion of a portion of the existing terminal building into the Great Lakes Natural Resource Center, maintained and operated by the State University of New York at Brockport. This facility would provide an early economic stimulus to the site, creating a presence of researchers and support staff to begin generating a demand for other activities on the site, as well as providing a focal point of activity around which to develop the marina, open spaces and other components of the plan. The use of the terminal building for the research facility would still provide opportunities for developing retail and leaseable office space within the building.



The Marina and Town Green



Typical View Corridor to Genesee River from Lake Avenue

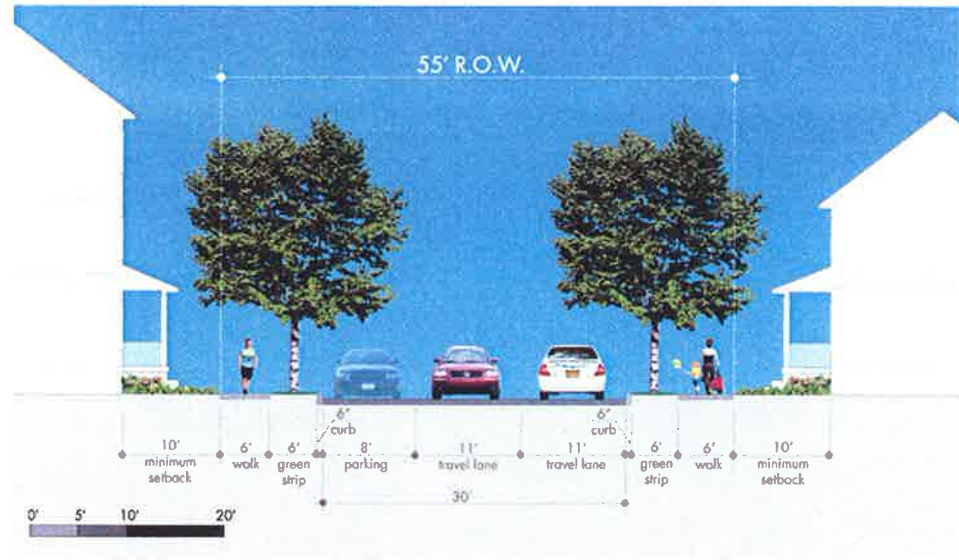


View from West to East

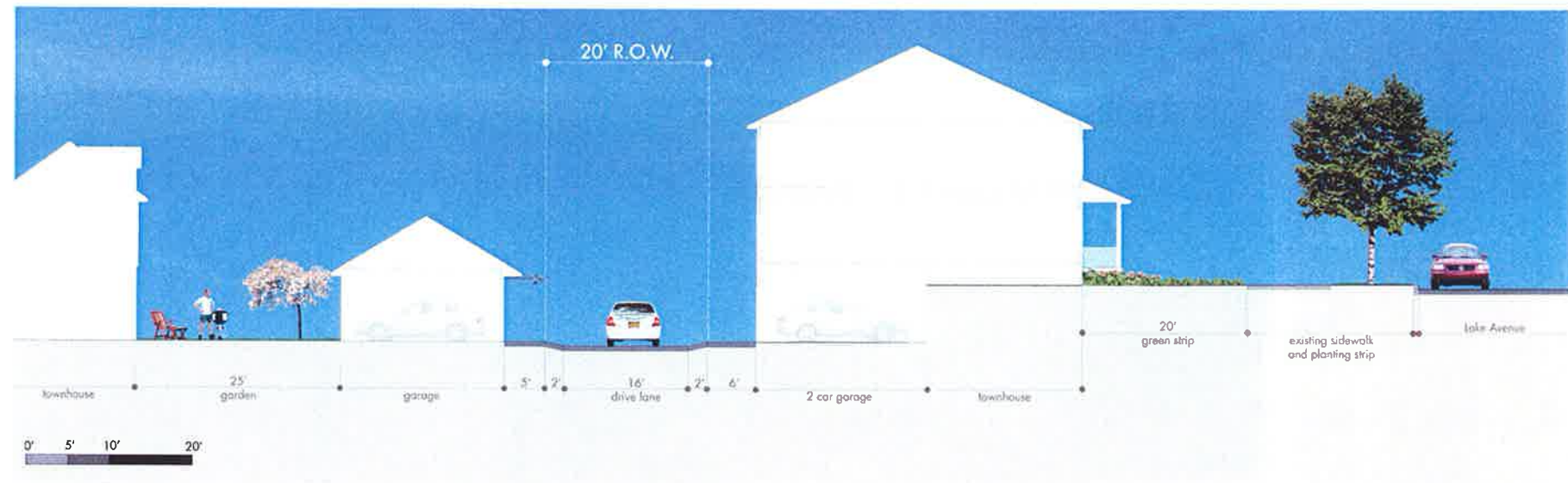
The development proposal, as presented in this report, assumes that ferry service will not be re-established at the site. However, there is the potential to accommodate a future ferry service within certain parameters. The future service is assumed to be passenger only (no vehicular transport) and of a smaller scale than the fast ferry service. This would significantly reduce the program required to support a ferry, particularly the large vehicle staging areas required to queue cars for loading and process cars through customs after unloading. There would still be a requirement for passenger ticket sales and waiting as well as customs processing, but these activities could potentially take place within one of the proposed waterfront buildings. The parking needed to support the ferry could be accommodated within a parking structure built along the southern edge of the site, replacing one of the residential buildings proposed for that area. Changes of this nature are expected as the plan and development evolve in response to new opportunities created by the economy and other development initiatives.



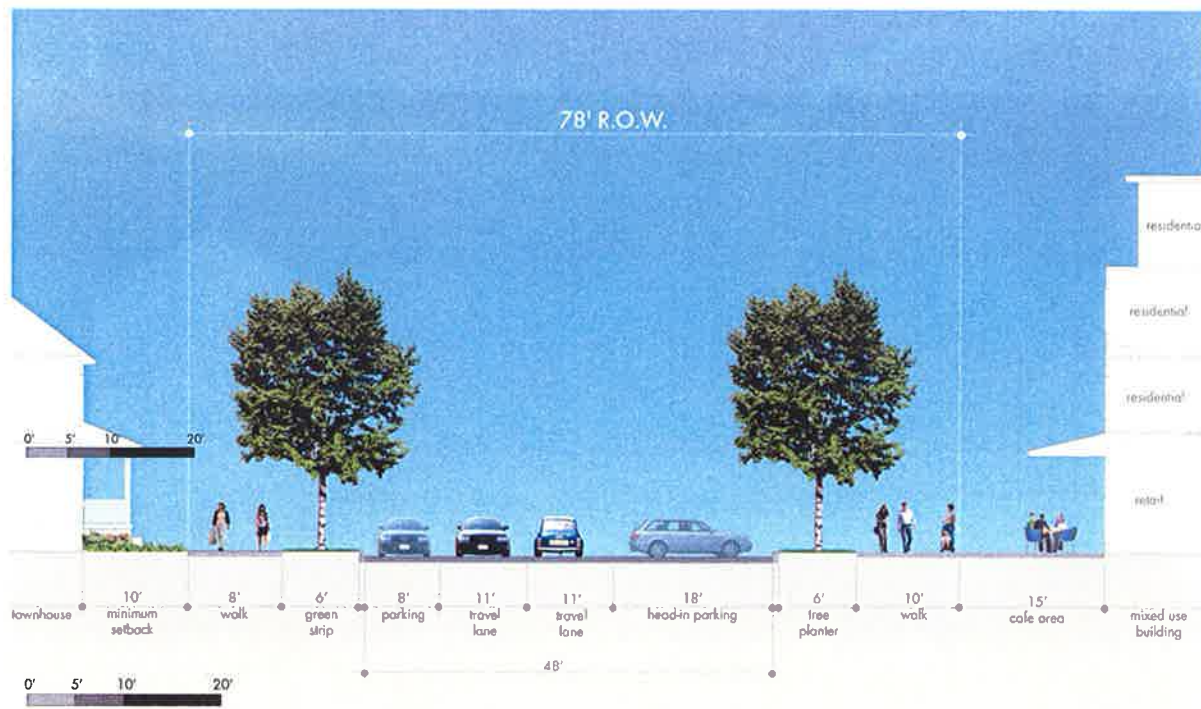
Perspective view



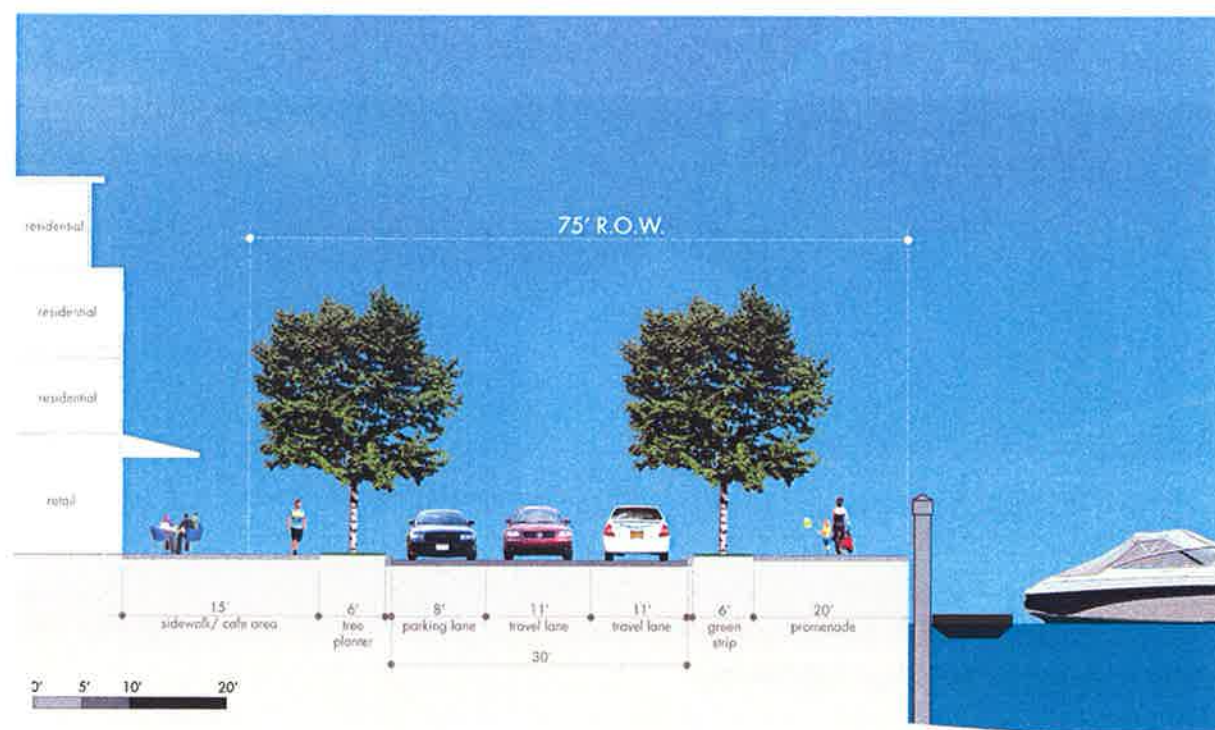
Section A-A: Typical Residential Street



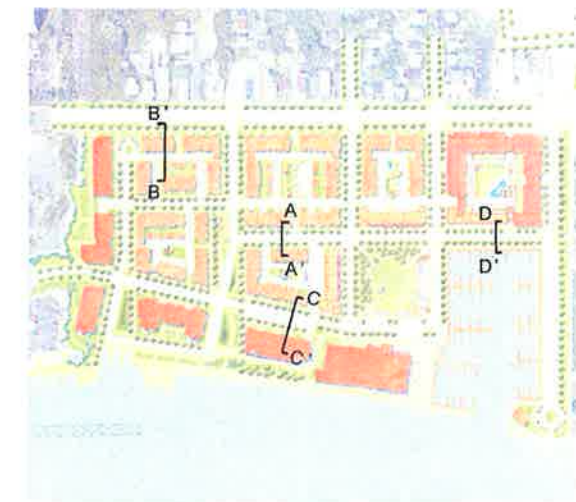
Section B-B: Typical Alley

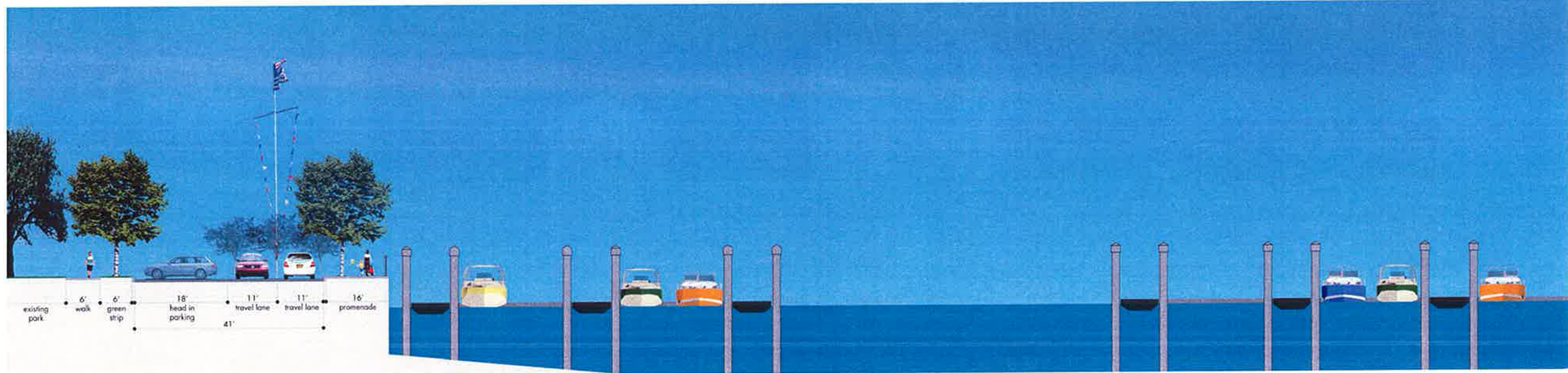


Section C-C: Typical Section at Retail

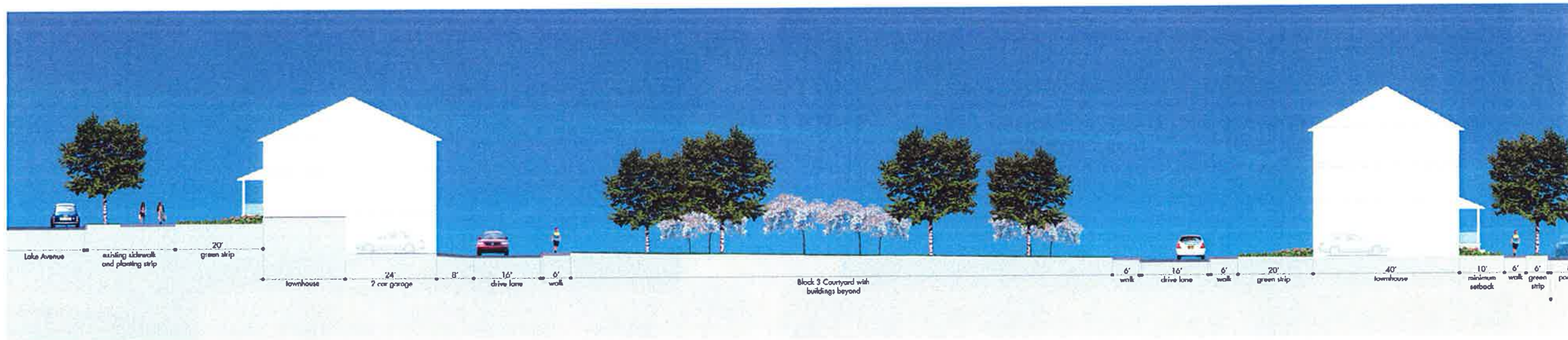


Section D-D: Typical Street at Marina

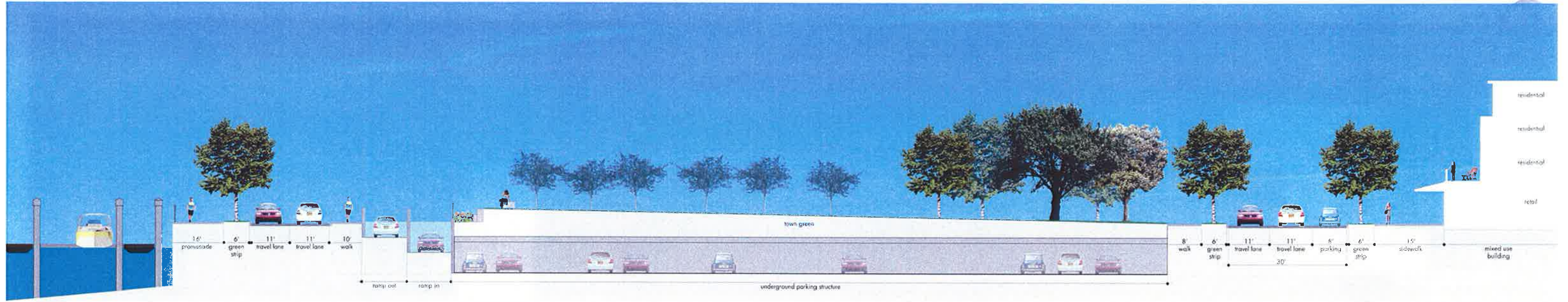




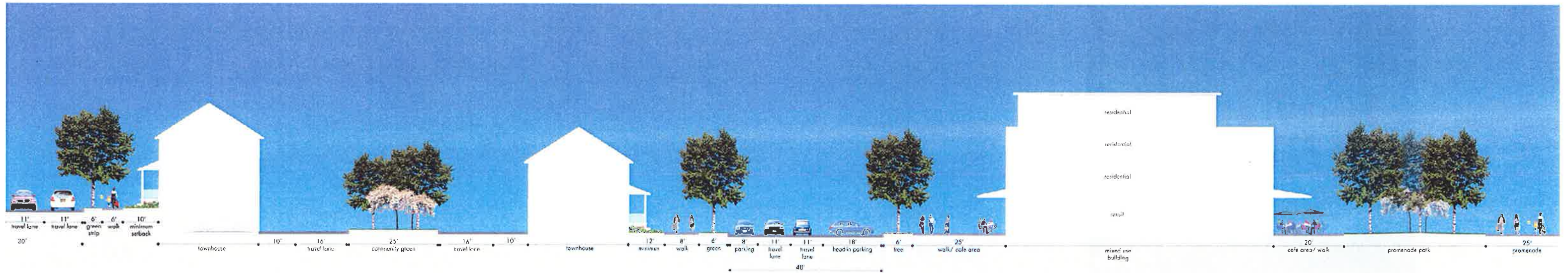
Section E-E: Marina and Town Center



Section F-F: Lake Avenue to Genesee River Promenade

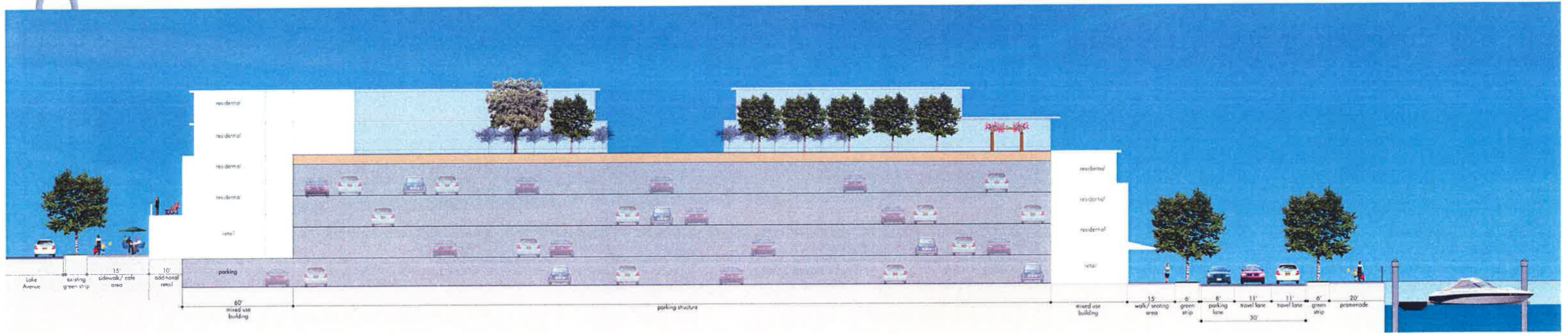


Section G-G



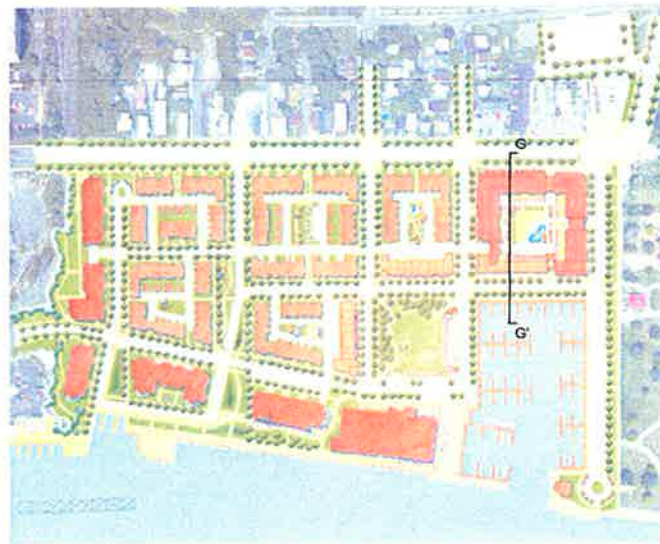
Section F-F

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Section G-G: Lake Avenue to Marina

Section G-G



Development Components 4

HOUSING

The primary use of the site will be residential. Empty nesters and young professionals establishing first households will be the target market groups. This will be a waterfront community with a variety of housing types that will create a new urbanist neighborhood.

The housing types sought by these two markets have many similarities, for different reasons. Empty nesters are seeking to reduce the capital investment in their homes by downsizing to something that is easier to maintain and afford. First time home buyers are looking for smaller dwellings with potential for value growth. Both groups are seeking communities that they can become part of and that will meet many of their needs in the immediate development area. Empty nesters will have a means to extend their circle of support, and first time home buyers can create vitality and community around their place of living. The potential of value in the Port development will appeal to both groups as the only major waterfront oriented housing development in the Rochester market. It will command a premium from those interested in the lifestyle and vitality that the marina and its supporting elements will bring.

Townhouses

Townhouses are provided in a number of different configurations to appeal to different sub-groups of the primary target markets. Townhouse sizes range from 1,750 sf to 2,600 sf per unit, configured in widths of 20 to 24 feet and utilizing two or three stories. Enclosed parking is included for all townhouse units, either as tuck-under garages where grade changes in the site can be leveraged to economically create this configuration, or as detached garages on flatter portions of the site. Two spaces per unit are provided. Townhouses are organized around four sided city blocks, of approximately six to eight attached houses per side. These blocks also create interior courtyards featuring vest pocket parks and play yards that will be accessible to the public. The parking supporting the units is accessed by a system of alleys or service roads behind the units, keeping interruptions of the sidewalks and front yards of the units by driveways to a minimum.

The arrangement of the townhouses provides not only a variety of unit sizes and configurations, but also a variety of placements within the overall development. Some units front the main public street of Lake Avenue others front the new marina, the new town green or other open spaces. The plan is configured to maximize views of all units to the river and lake front.

The intent of this variety in unit configuration and siting is to create a mix of pricing within the development that will appeal to potential residents.

Apartments

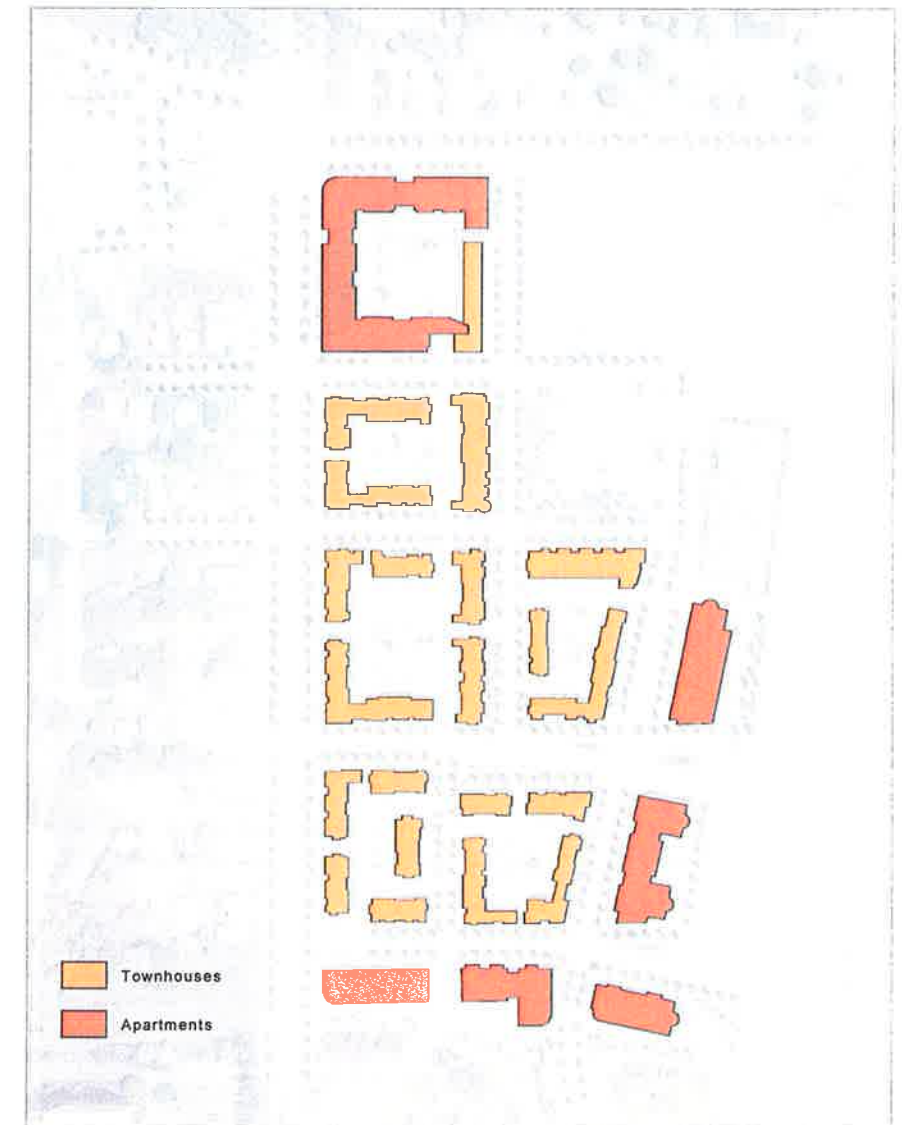
The proposed development includes eight apartment blocks located at key points in the plan. The locations were selected to define the edges of the development, to provide maximum return on highly desirable sites like the waterfronts, and to take advantage of the potential to mix ground-floor retail opportunities with housing to create larger structures. The apartments are to be single-floor units arranged on double-loaded corridors. The structures are to be three-story buildings where no ground-floor retail is included and four stories with retail. Parking for the units will be provided as a basement garage, and will provide 1.5 spaces per unit.

The apartment blocks front onto the riverfront, Lake Avenue and the marina, creating distinct and interesting views from each unit.

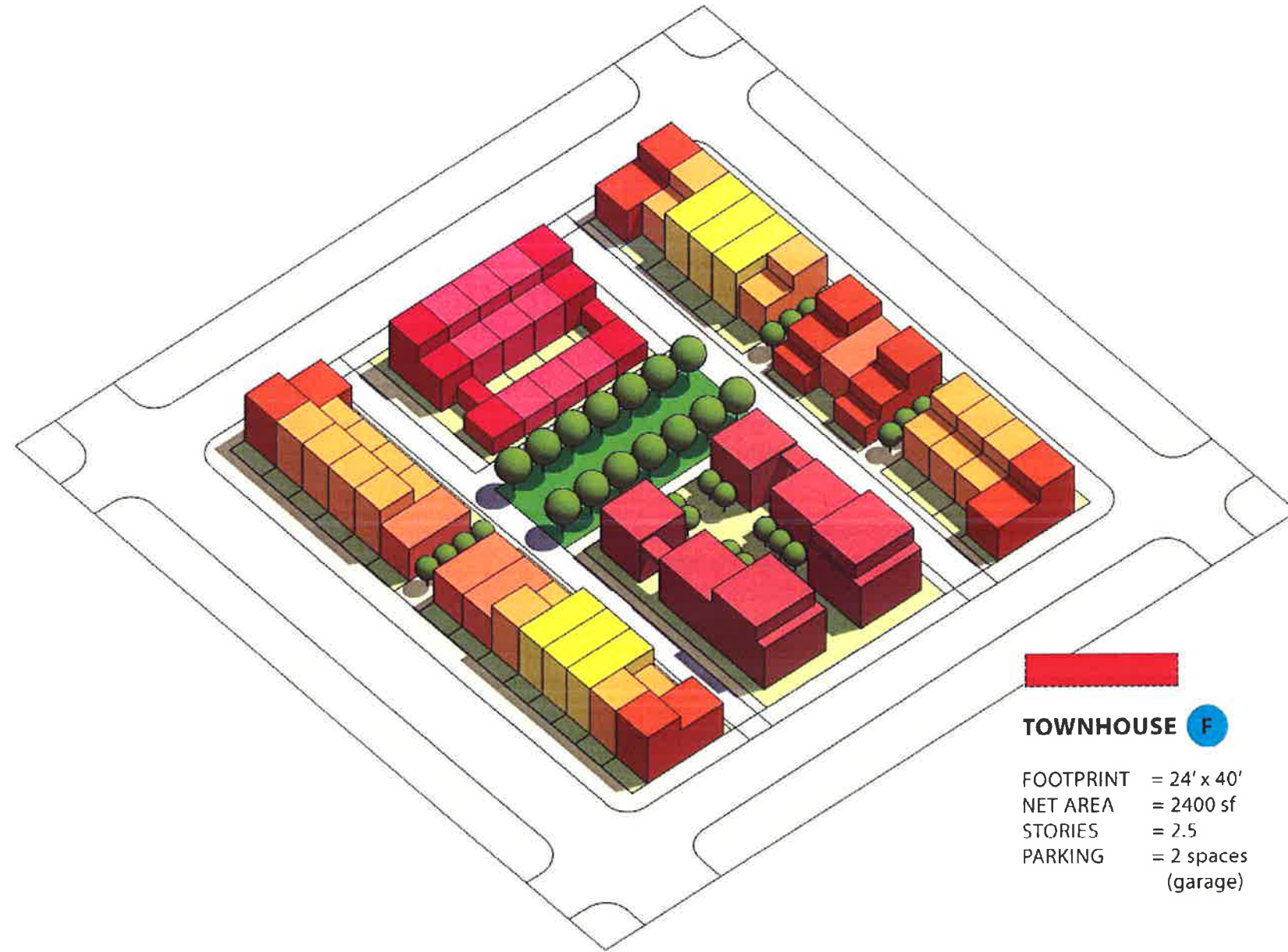
Establishment of pricing for the apartment units will depend on unit size, finishes, location, views, amenities and other factors. The variety of building types and locations provides for a wide range of possible price points.

Unit type	Quantity
Townhouses	147
Apartments	248
Total	395

Housing count breakdown (by type)



Highlighted plan - Housing



TOWNHOUSE F

FOOTPRINT = 24' x 40'
 NET AREA = 2400 sf
 STORIES = 2.5
 PARKING = 2 spaces (garage)



TOWNHOUSE E

FOOTPRINT = 20' x 40'
 NET AREA = 2000 sf
 STORIES = 2.5
 PARKING = 2 spaces (garage)



TOWNHOUSE D

FOOTPRINT = 24' x 50'
 NET AREA = 2600 sf
 STORIES = 3
 PARKING = 2 spaces (tuckunder)

2 DU (2 Bed + 3 Bed Units)



TOWNHOUSE C

FOOTPRINT = 22' x 40'
 NET AREA = 1750 sf
 STORIES = 2
 PARKING = 2 spaces (tuckunder)



TOWNHOUSE B

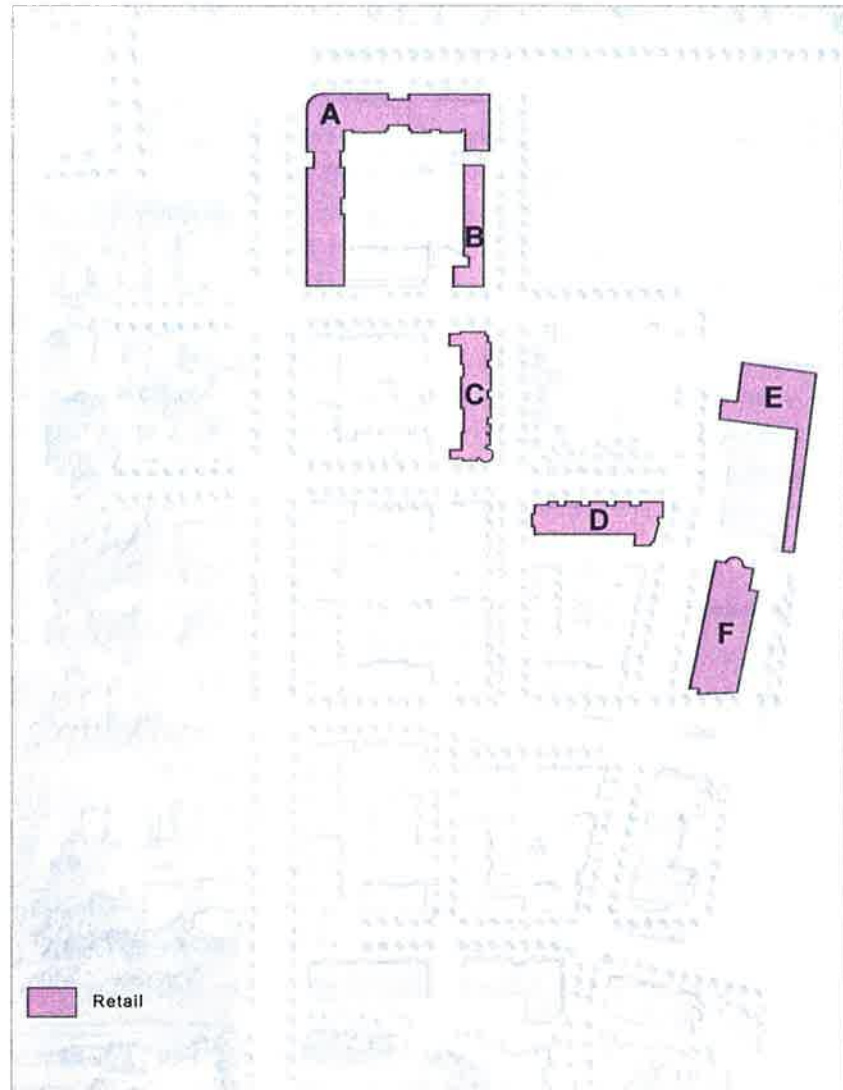
FOOTPRINT = 20' x 40'
 NET AREA = 2000 sf
 STORIES = 2.5
 PARKING = 2 spaces (tuckunder)



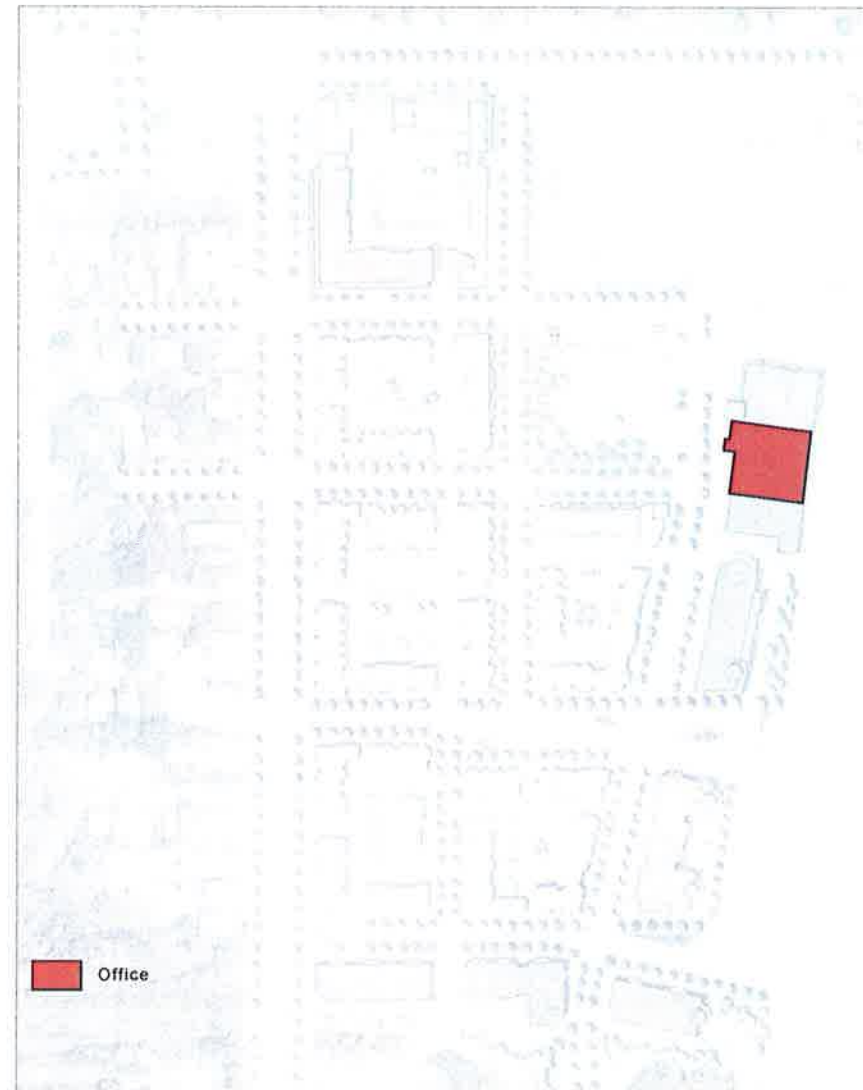
TOWNHOUSE A

FOOTPRINT = 18' x 42'
 NET AREA = 2250
 STORIES = 3
 PARKING = 2 spaces (tuckunder)

Housing types diagrams and typical block configurations



Highlighted plan - Retail



Highlighted plan - Office

RETAIL

The market analysis indicates that the site could support up to 78,000 sf of retail space, roughly half of which would be eating and drinking establishments. The master plan accommodates these uses in a number of locations around the site, to take advantage of anticipated pedestrian traffic patterns and activity generators.

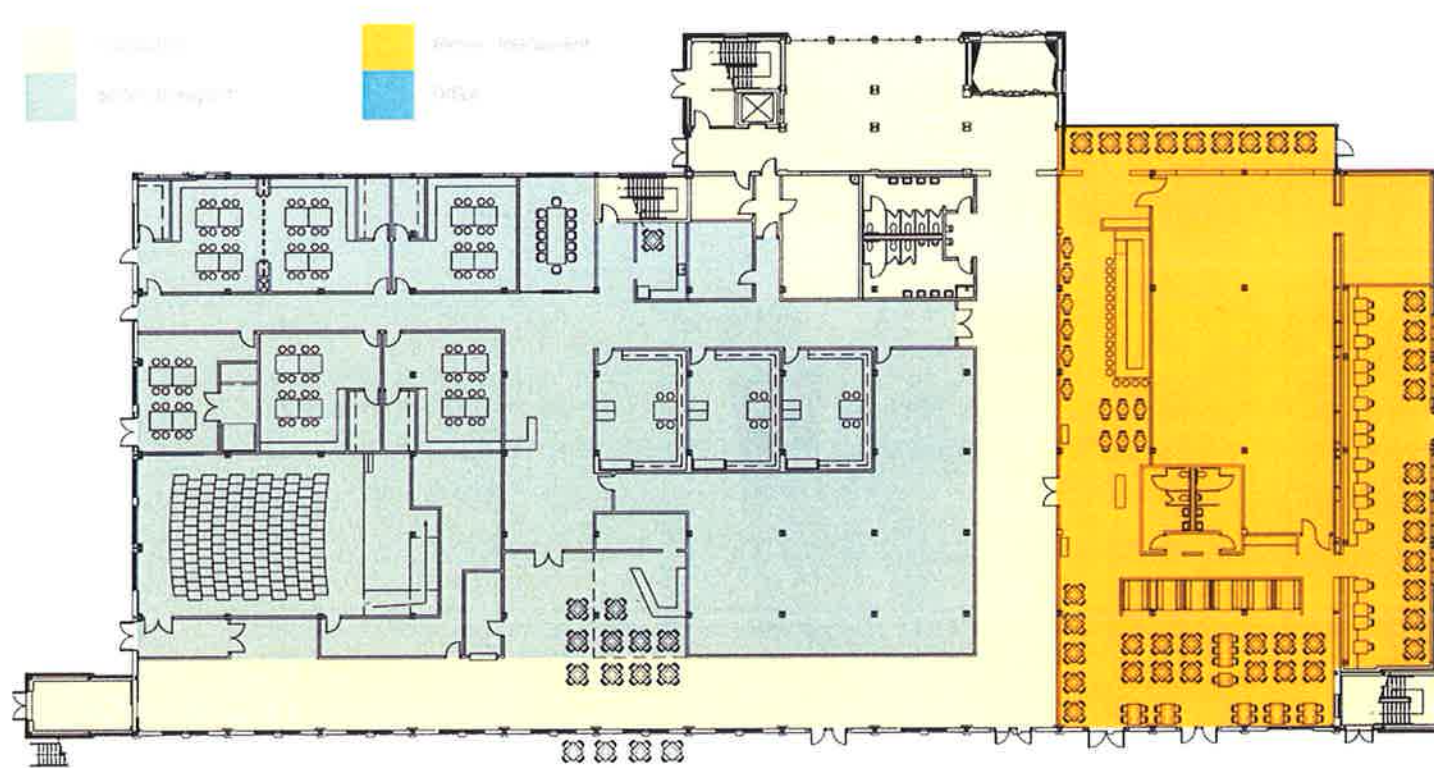
Most of the retail space will be oriented toward Lake Avenue, where it will have the greatest visibility, access, and compatibility with similar existing uses along the west side. The northwest corner of the site, at the intersec-

tion of the beach access drive and Lake Avenue, will see a large volume of pedestrian traffic, particularly on concert nights and summer weekends, and is a prime location for retail development. The terminal building will continue to include some restaurant uses, as will a new retail/residential building to its south.

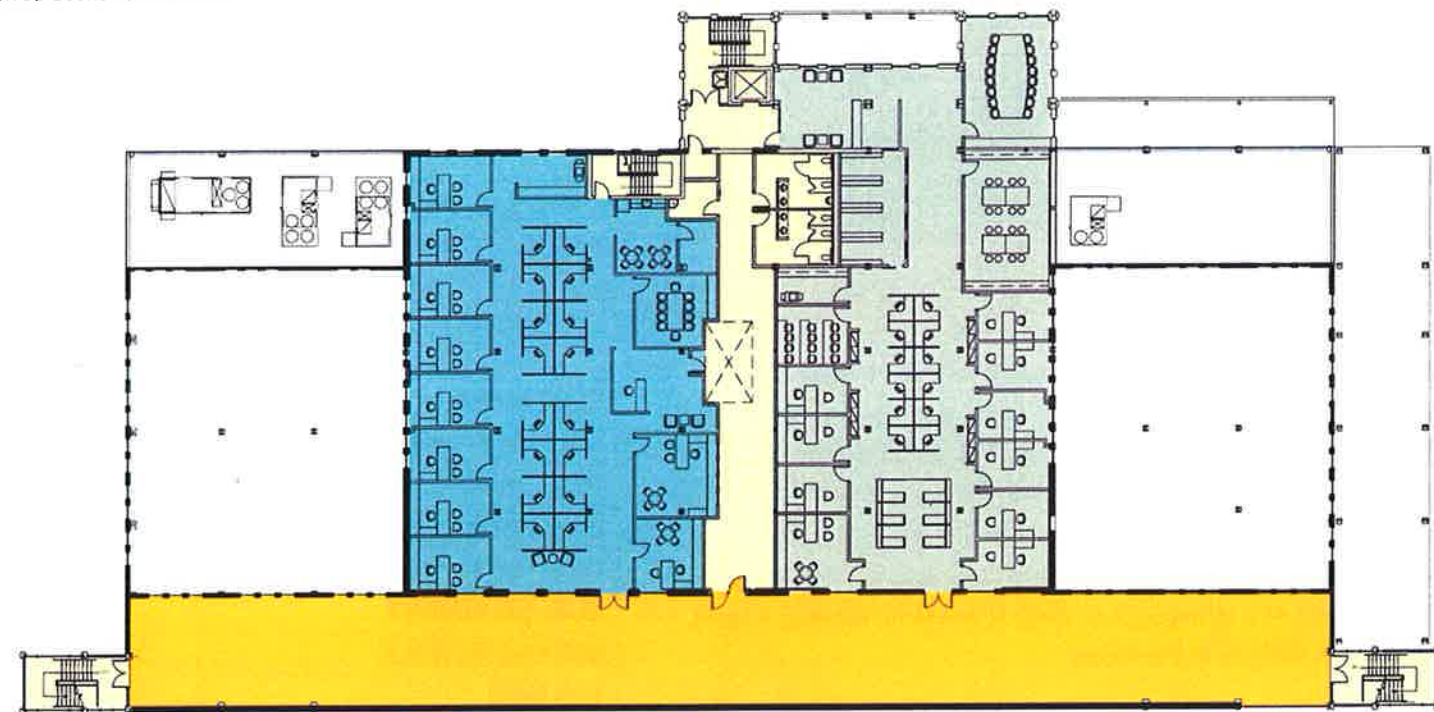
Other structures in the plan, particularly along Lake Avenue, will be constructed in a manner that conversion to retail is easily achievable, should there be increased demand in the future.

Retail location	Size
Mixed Use Building A	30,000 sf
Mixed Use Building B	8,000 sf
Mixed Use Building C	10,000 sf
Mixed Use Building D	10,000 sf
Mixed Use Building E	9,600 sf
Mixed Use Building F	12,000 sf
Total Retail	79,600 sf

Retail breakdown



Preferred Scenario First Floor



Preferred Scenario Second Floor

OFFICE

The market analysis prepared for the site indicated a potential to accommodate as much as 76,000 sf of office development within the project. It is anticipated that at least the second floor of the existing terminal building would continue to be used as leasable office space. Development of large-scale office uses, however, is difficult within the other goals and components of the master plan. Office development requires a large number of parking spaces (usually 3 or 4 cars per 1,000 square feet), and accommodating that much parking without large surface lots or dedicated parking structures would be difficult. In the case of parking structures, it is unlikely that the current lease rates for the office space would support the development of structured parking within the foreseeable future. As such, the master plan anticipates a limited amount of office space located where it can take advantage of other parking resources.

Office location	Size
Terminal Building (second floor)	6,000 sf

Office breakdown (location, size)

TERMINAL BUILDING REUSE

As a component of the overall development of the Port of Rochester site, a new use has to be found for the recently reconstructed terminal building while preserving a portion of it for passenger only ferry service. The building presents great potential. It has modern infrastructure, large floorplates with very high first floor ceilings (approximately 19 feet, with some areas even higher), and interesting architectural features such as the entry and corner towers and the second level portico on the river side.

The building would be suitable for any of the uses proposed for the site, including residential (with the potential for loft-style units due to the ceiling height available), retail and restaurant (the structure currently houses some restaurant and limited retail uses), and office (the second floor was rebuilt into office suites during the previous renovation).

The State University of New York at Brockport has proposed creating a Great Lakes Natural Resource Center (NRC) within the Port of Rochester parcel as a research facility serving the university and potentially other institutions. With the cessation of ferry service to the site, and no new viable ferry service on the horizon, conversion of the existing structure into the NRC has great potential. Initial discussions with the University and their

architectural consultants suggested this would be an acceptable solution; further study by the NRC team is required to finalize the arrangements.

Reuse of the building for this purpose has many advantages. It creates a potential early-action item for the site, as redevelopment of the building could move independently from the rest of the site. The NRC would also create an initial population on the site, bringing workers to use retail and other facilities. This activity would also create a potential destination for visitors, as part of the program is an educational center with an auditorium and a small aquarium.

The design team prepared a series of alternative studies, looking at ways to incorporate the NRC program into the building and maximizing the remaining space for retail, restaurant and possible future passenger ferry uses. After reviewing these with the NRC development team, it was agreed to carry Option B forward. A more detailed review of the existing building and options for its redevelopment is included in Appendix H.

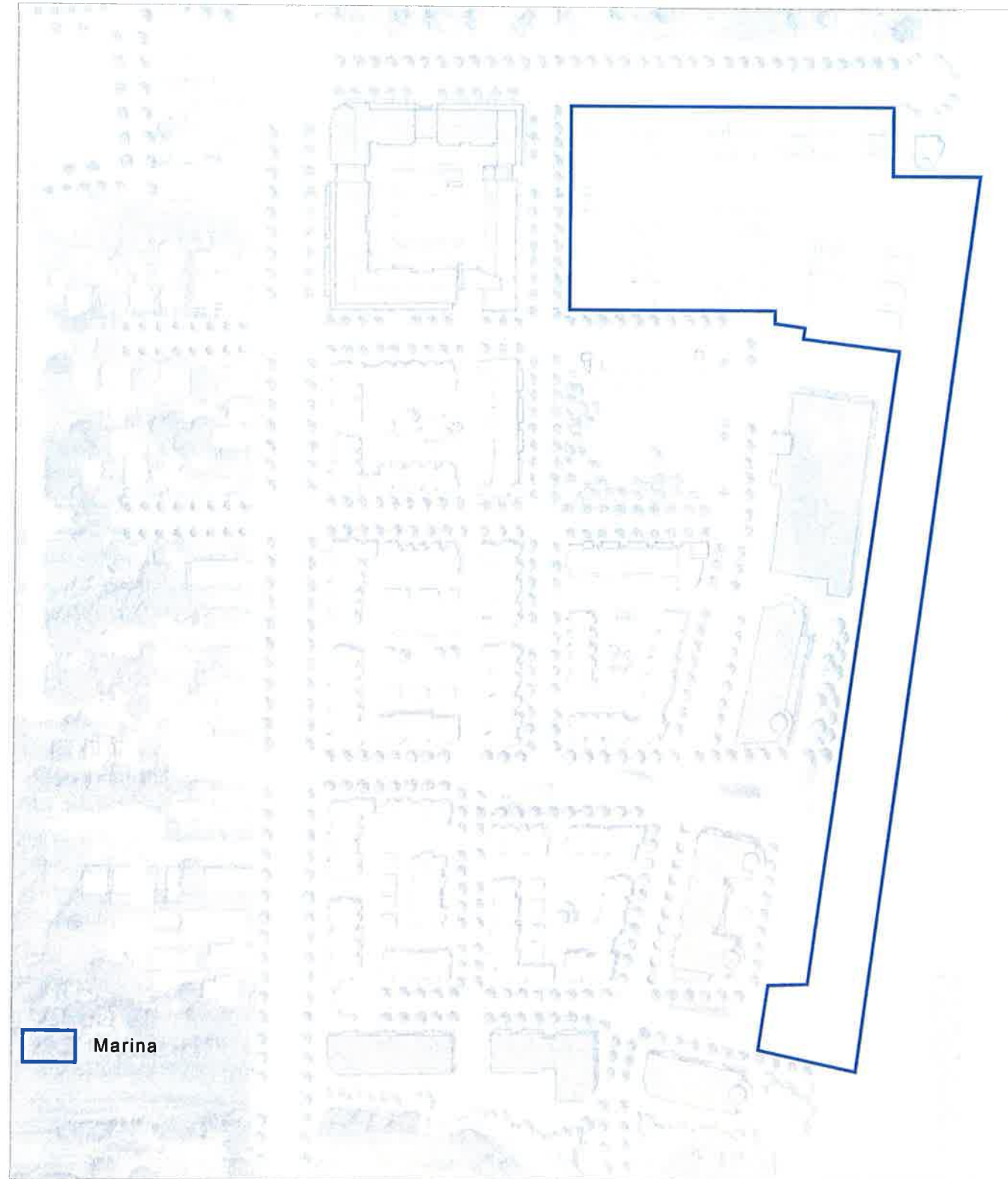
MARINA

A major new feature of the development will be a 100 slip marina, constructed in the site's northeast corner. The boating market remains very strong in the Rochester area, both for leased and transient dockage. This facility, with its immediate access to Lake Ontario and the current and future amenities of the village of Charlotte, should prove very attractive to boat owners. The marina will provide dockage for boats of up to 40 feet in length, and will be able to accommodate a limited number of larger boats.

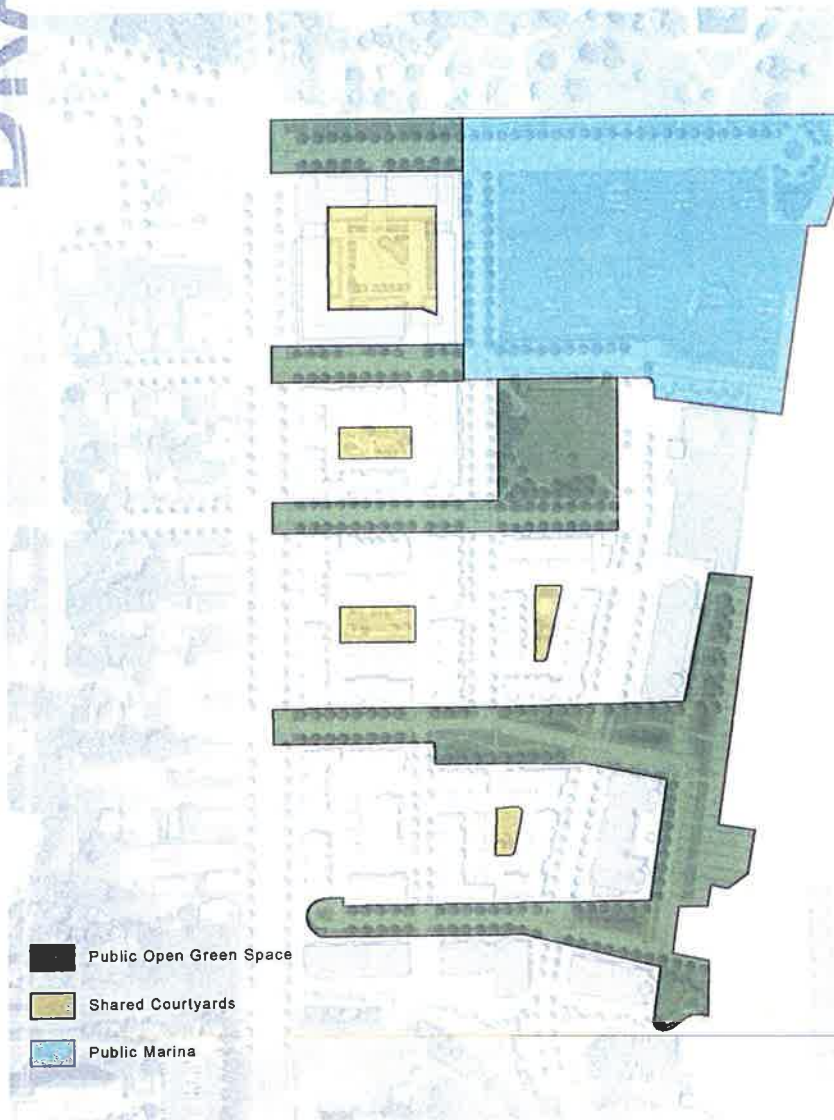
The marina will also be a major component of the development's open space system, preserving views across the site to the beach and park, and providing promenades on all sides for pedestrian access. The marina will also serve as an attraction, bringing people to stroll its edges and watch the boats.

Constructing the marina in its proposed location will enhance the value of the town green as well as the real estate uses that surround it. The marina will become a central feature in the center of the village and will play a key function in preserving open space and views to the surrounding water bodies.

The marina is envisioned as a limited service facility: fueling, repairs and hauling out of boats would not be provided, nor would winter storage. Although, laundry, shower, supply, and other landside facilities should be accommodated as part of the development's retail functions. Boat service facilities such as fuel, repair, and haulout are readily available across the



Highlighted plan - Marina



Highlighted Plan - Public Open Space

river in Irondequoit. The lack of these facilities within the proposed marina will be no hardship for its future patrons.

To serve the greater need of the boating population in Rochester, the master plan proposes for the majority of the slips in the marina to be available on a first come first serve leasing basis, with annual renewable lease. This will allow for lease rate adjustment based on true market demand. A small number of slips should be reserved to accommodate the need of transient docking.

OPEN SPACE

The open space system of the development incorporates three major components: Streetscapes; parks; and courtyards.

Streetscapes

The streetscapes of the development are designed to provide comfortable walking spaces that connect the different components, and provide an opportunity for residents, visitors and other users to meet and mingle. Generous right-of-way widths have been set aside to allow for street tree plantings and broad planting strips along the streets. These also provide the advantage of separating the vehicular traffic from the sidewalks, quieting the sidewalks for pedestrians and the residences. Appropriate and adequate site furnishings should be provided along the streets, with seating, trash receptacles, and other amenities located where needed.

Parks

The plan provides for three major park areas throughout the development: the town green adjacent to the terminal building and the marina; the waterfront promenade along the entire length of the riverfront; and two smaller greens (pocket parks) where streets of the development meet the riverfront. The town green is intended to serve as the primary recreational and gathering space of the development, with room for small group events and passive recreation. It is envisioned as a primarily soft park, with walking paths and seating areas as well as a large lawn suitable for hosting events and small games.

The riverfront promenade is an extension of the walkway on the pier, providing a connection from the development along the eastern edge of Ontario Beach Park to the lake itself. The promenade follows the bulkhead on the river from the terminal building south, and the edge of the marina to the north. A flagpole provided at the end of the beach access road serves as both a terminus to the road and a visual element along the riverfront defining the development and the marina. South of the terminal building, the

promenade widens to include a narrow green park, providing separation and protection between the walkway and the ground-floor retail and residential activities occurring in the adjacent buildings.

At the intersections of Portside Street and Marina Drive with River Street, there are small greens provided within the street rights-of-way. These greens are intended to preserve views of the river from Lake Avenue by limiting building placement. These spaces will therefore need to be kept free of vertical elements, such as street trees, but could be used for informal seating, flower gardens, and other purposes.

Within the building clusters, there are courtyards set aside for public use. These are intended to serve as tot lots, community gardens, or other shared purposes, and may vary from block to block. The access routes to these courtyards will be important in maintaining the perception that they are public, shared spaces, not private domains of the adjacent housing. To accomplish this, the Master Plan has designated wide walkways between housing structures with planting, lighting and other elements to help draw the public into them. Recognizing the harsh winter climate within the lake frontage and the winter lake effect microclimate, these contained and intimate public spaces are designed to extend the use of outdoor activities in early spring and late fall. The buildings that surround each space should provide protection from wind, while allowing ample sunlight for daily use.

Location	Type	Size
Town center	Town green	50,500 sf
Portside Drive	Green	25,800 sf
South Drive	Green	8,100 sf
Block 1	Courtyard	7,000 sf
Block 2	Courtyard	6,600 sf
Block 3	Courtyard	8,800 sf
Block 5	Courtyard	3,400 sf
Block 6	Courtyard	4,600 sf
Promenade Green	Green	13,200 sf
Total		128,000 sf

Green space breakdown (location, area, type)

TRANSPORTATION AND PARKING

Transportation

The primary means of access to the site will continue to be private automobile for the foreseeable future. A preliminary traffic study was prepared to identify any fatal flaws that might result from the proposed development adding traffic to the existing flows along Lake Avenue, none were found. The traffic analysis and a description of its conclusions are provided as Appendix I. One significant change from the development that may improve area wide traffic flow is the reconnection of River Street over the former CSX right-of-way. This will provide a second means of access and egress from the development that avoids the Lake Avenue Bridge over the railroad. While River Street no longer continues south along the river past Stutson Drive, getting past the bottleneck on Lake Avenue will help in improving overall traffic flow.

This development will create a new population. Although, the associated retail and recreational venues will not create a population large enough to justify increases or adjustments to the current public transportation service to the site.

In assessing the potential traffic impacts and parking needs of the Port of Rochester, the new-urbanist character of the master plan must be taken into account. This can be done by adjusting the factors of trips generated and parking spaces occupied per unit of development to reflect that, especially in the case of the convenience store and restaurant uses, a large proportion of the traffic will be on foot or other non-auto mode. In the analysis presented in Appendix I, the trip generation and parking needs rates used for convenience store and restaurant are 25 percent and 50 percent, respectively, of the rates given in the manuals published by the Institute of Transportation Engineers.

Trip generation

Trip generation is a projection of how many vehicles will enter and leave the development based on the proposed land uses. Trip generation is the first critical step in developing the total traffic impact of a development, and is usually followed by detailed traffic analysis of the various intersections within the project, adjacent to the project, and along major routes leading to and from the project. Trip generation provides an early estimate of the potential for traffic impacts, and can be used to fine-tune proposed development components to minimize traffic impact.

The initial analysis prepared for the Port of Rochester master plan suggests that the total daily vehicular traffic generation of the proposed development will be on the order of 10,100 trips. Table 1 shows the projected AM peak-

hour, PM peak-hour and daily trip generation. Methodology and assumptions are detailed in Appendix I.

Appendix I also demonstrates that the volumes of traffic generated by the Port of Rochester development program will be comfortably accommodated by the planned road system.

	AM Total	Trips in	Trips out	PM Total	Trips in	Trips out	Weekday
Trips	478	191	287	681	387	293	10,097

Trip generation

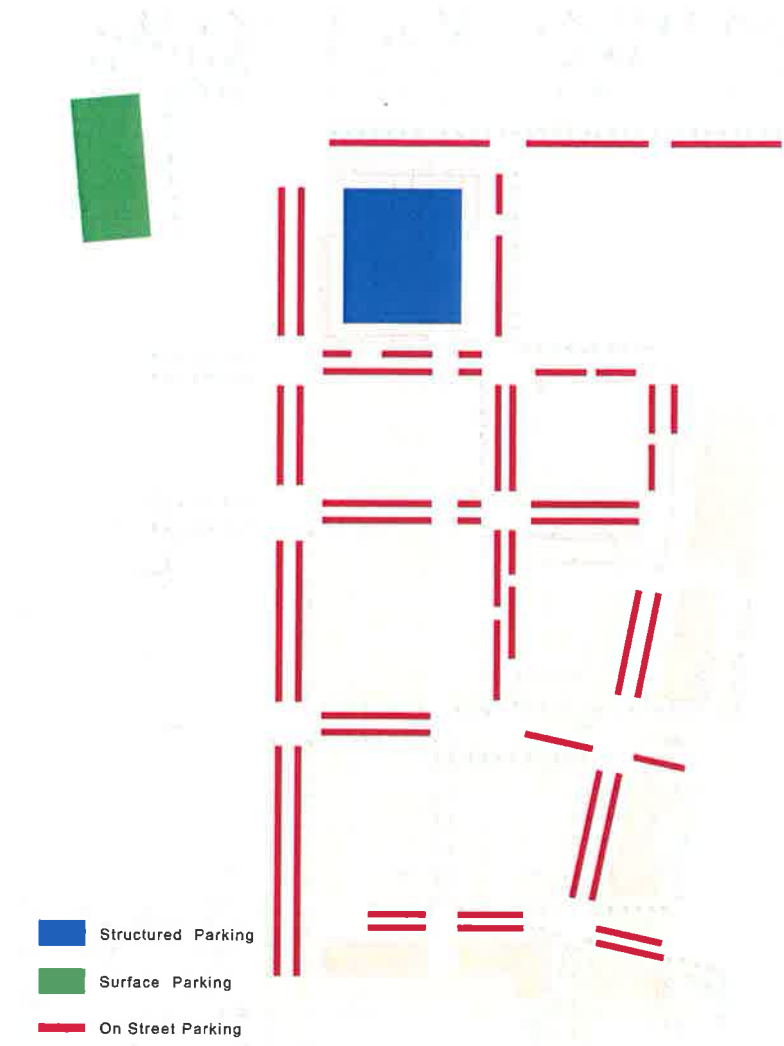
Structured		Public		Reserved/Residential	Totals
		on-site	off-site		
	off-street	540	0	125	665
	on-street	46	80	541	667
		154	150		304
Totals		970		666	1,636

Parking

Parking facilities within the development can be broken into three components: Housing, office and retail, and beach/park. Parking for the residential units will be provided either within or adjacent to the unit (for townhouses) or within the residential structure (for apartments). The townhouses will each be provided with two parking units, at least one of which will be a garage. The garages will be tucked under, attached, or on the first level within the unit depending on unit type and location. The second space for townhouses would be provided as a space within the garage driveway for units with only a single garage. In addition, the interior courtyards provide some overflow parking, for use by guests and others.

Apartment units will be provided with 1.5 spaces per unit. This parking will be accommodated as basement or first-level garages within the footprint of the building; no open surface lots will be required for the apartment blocks.

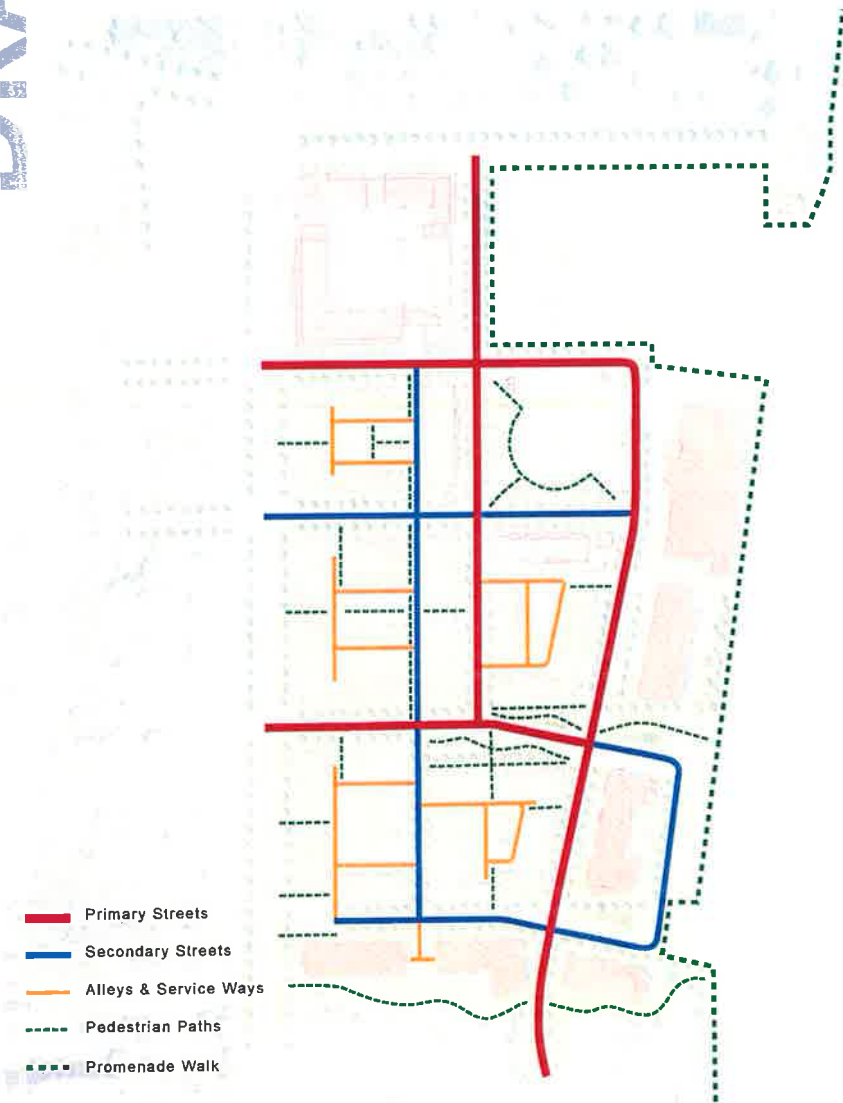
Parking for office and retail uses will be provided as on-street parking along the public streets. All streets will be lined with parallel parking on both sides. Where higher concentrations of retail or office uses are proposed, head-in parking will be provided to increase availability in the immediate area. As retail and office uses are scattered throughout the development, there should be adequate parking using this method. Since the proposed uses include both office/research and development and restaurants, there



Parking Diagram

Parking Distribution	Spaces
Residential	666
On-Street	200
On-Street (Lake Ave. and Park Drive)	150
Structured (Public)	400
Sub Surface (Public)	140
Off-site Surface	80
Total Parking	1,636

Parking distribution



Circulation Diagram

will be considerable opportunity for parking to be shared between uses whose activities peak at different times of day.

The site currently accommodates approximately 1,200 parking spaces for beach users. Previous parking studies have shown that over 90% of that capacity can be in use on a summer weekend. The development will reduce the total availability of parking for the beach, as the lots will be converted to development parcels. To compensate for the reduction in beach parking, two structured parking facilities are proposed, which together will provide 540 public spaces as well as 125 residential spaces. The public garage spaces will accommodate more than the average summer weekday parking demand for the beach. This structure is proposed to accommodate approximately 400 spaces, which is equal to the summer weekday demand for the beach. The garages will also serve restaurant and retail establishments within the development and along Lake Avenue.

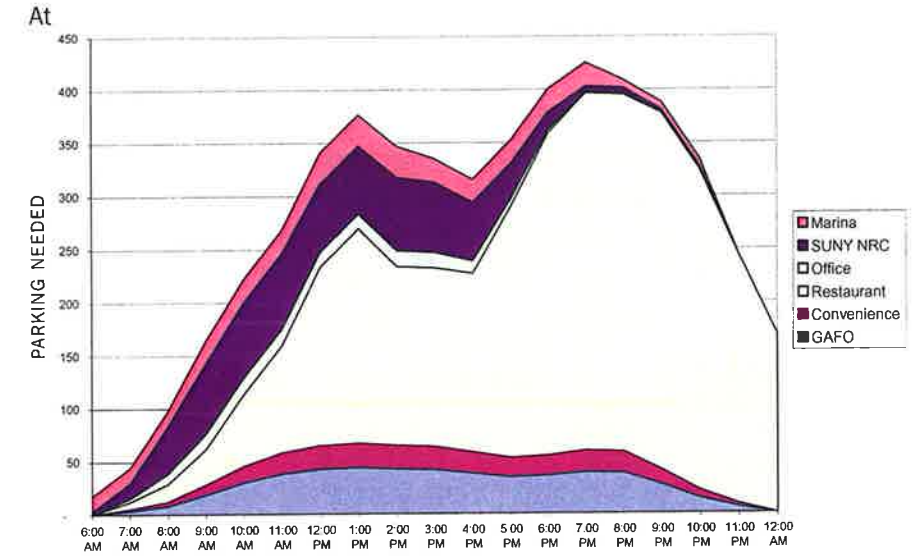
The parking structure may still leave the beach short of its current summer weekend demand. In the past, the city has used different methods to address this, such as shuttle buses servicing remote lots. The city/community will continue to use remote lots to meet the peak parking demand for summer weekends and Wednesday evening concert activities. The expanded use of public transportation and the development of bicycle paths and pedestrian trails connecting to the beach area may help in reducing total parking demand as well.

INFRASTRUCTURE

Roads and Streets

The development plan has assumed that all existing streets within the development parcel will be retained. This approach will build upon the urban block structure that was started by the terminal development. This is appropriate to the site and neighborhood, and will also minimize future development costs. New streets have been added to complete and expand the neighborhood street grid, Hincer Street is extended to Lake Avenue, and Portside Drive is extended to the river. A fourth east-west street has been added at the southern end of the site to provide an additional set of blocks between Portside Drive and the railroad right-of-way.

One major departure from the existing street pattern is River Street. The Master Plan proposes creating a new River Street that runs parallel to the river, tying into the existing drop-off loop at the terminal building, which would replace Dentzel Street. At its southern end, the new River Street would cross the CSX railroad right-of-way at its proposed location, a slight geometric change would be needed to the proposed alignment to make this new configuration work.



Graph: Parking demand on a typical weekday

The northern edge of the site, the parking and drop-off access for the beach would be retained by turning the circulation aisle serving these functions into a self-contained street. The street would maintain the head-in parking on its north side. The south side of the street would abut the marina and a retail/residential block, with curbside parking at the mixed use building only. This new reconfiguration would require access to Lake Avenue, which would mean modification of the signals and geometry of the Lake Avenue/Beach Avenue intersection.

Utilities

The redevelopment of the port site in the early 2000's brought new utility services to support the terminal building and the anticipated future build-out of the site. All necessary utilities have been provided – electrical, communications, water, sanitary sewer and storm drainage. The capacities of these utilities will need to be reviewed in light of the proposed development to confirm that sufficient capacity exists to support the build-out program. All utilities have been installed underground, and would be continued as underground systems in the new development.

The City of Rochester has a golden opportunity to make the port development project an environmentally sustainable one by obligating itself and potential developers to follow the international Green Design initiative. This project could have a great and positive impact on the region and could attract national and international interest because of its unique location. Following low impact development techniques, in lieu of standard past development practices, the City can create a unique neighborhood unlike any other in the region and show ultimate sensitivity to the living environment.

By reducing or eliminating direct discharge of storm water runoff to the Genesee River and Lake Ontario, the water quality in both water bodies will improve over the life cycle of the project. By following best management design practices surface runoff from storm water can be channeled into the ample green spaces the Master Plan created to filter the water before discharging it to the adjacent water bodies. The town green along with many other pocket neighborhood parks can be utilized to store, filter and cleanse the surface runoff (subterranean storage) prior to discharging it.

Other measures as well can be considered to reduce the ultimate and long term energy consumption. Combining solar as well as wind generated energy, could prove economical and desirable to attract new residents to live, play and recreate in a unique neighborhood that has a colorful and diverse history.

The primary impact to the existing utilities will be the creation of the new marina. There are two utility mains, a 21" sanitary sewer line and a 4" gas line, that cross the site of the future marina, and will have to be either lowered below the bottom of the marina or preferably re-routed to the west around the proposed basin. There are numerous storm drains within the existing parking lots that will need to be demolished as part of the marina construction. There are also one or more storm drain lines that pass through the marina site heading towards outlets into the river; these will need new outlet structures within the marina. There are also existing utilities of various types that supported the ferry operations, including pneumatic tubes that connected the vehicle customs plaza with the main building, and sanitary and water connections for the boat while docked, that will have to be removed when they interfere with new buildings.

Based on the proposed mix use program the following table estimates the potential utility needs:

Use	Quantity		Daily usage rate	Flow rate per day*
Townhouses	147 units	3 bdrm/unit	250 gal/bdrm	110,250 gal.
Apartments	248 units	2 bdrm/unit	250 gal/bdrm	124,000 gal.
Retail	80,000 sf		65 gal/300 sf	17,333 gal.
Office	6000 sf		45 gal/300 sf	900 gal.
Marina	100 boats		25 gal/boat	2,500 gal.
TOTAL				254,983 gal.

Projected Domestic Water/Sanitary Sewer Demand

** Does not include Natural Resource Center*

5 Implementation



Funding source diagram

PRIVATE AND PUBLIC INVESTMENT

One of the first issues the City needs to address is the portion of the project's development they are willing to undertake up front. Public investment through construction of the marina, the town green, and the roadways will have many benefits to the development scenario:

1. By undertaking these elements with City investment, the developers do not have to provide the additional financing necessary to support their construction or recoup their investments out of future sales. This significantly changes the financial picture for developers, increasing their interest to participate early in the development process. Also, as the marina carries certain risks with it due to the contamination of the site, resolving these issues under the City's lead simplifies the development environment for private developers.
2. By constructing these components with public money, it strongly reinforces that the streets, parks and waterfronts are within the public realm and therefore available to the public. Also, the use of public funding for these components will create a better rate of return on the City's investment, as it will establish greater value in the project and set the parameters for success.

By having the City play a strong role, the private sector will take notice and have ample incentive to participate, as startup development risks will be minimized and the regulatory approval process will be contained to vertical construction. This process will lead to true public/private collaboration.

PROJECT COSTS AND FINANCIAL MODEL

The master plan team has prepared a preliminary probable cost of construction for the project, including utilities, marina, roads and streets, open spaces, the parking structure on Estes Street, and the residential and new mixed-use structures. Due to the early design stage and to the current uncertainty in the construction market, a contingency of 30% has been applied to the cost projections to allow for design development and cost escalations. The cost of converting the existing terminal building into the Great Lakes Natural Resource Center is not included in the cost projec-

tions, as it is assumed that it would be accomplished and paid for outside the scope of the site redevelopment. Costs of renovations to retail and office spaces within the building are included. Also not included are costs of land acquisitions and demolition for the two existing structures on the east side of Lake Avenue north of Corrigan Street.

The probable cost of construction was used as the basis for developing two economic models for the development. One model assumes that the City of Rochester will make the infrastructure investment to build the marina, roads, open spaces and parking garage and turn over the residential, retail and office components to developers. The second assumes that the entire project will be built by private developers in one or more phases. A detailed cost estimate is provided in Appendix F.

Item	Description	Cost
General	Mobilization, site preparation, demolition, construction permits	\$381,600
Marina	Excavation, docks and gangways, utility hookups	\$5,740,420
Roads	Construction of new and modifications to existing roads, including street lighting, sidewalks, street trees, etc.	\$8,271,330
Utilities	Water, storm water, sewer, electric, telephone and gas	\$4,224,150
Open space	Parks, waterfront promenade, courtyards, signage	\$3,765,700
Buildings	Apartments, townhouses, retail and office space, parking garage	\$90,461,000
Contingency	Soft Costs, Permits, Construction Contingency	\$33,853,260
Total		\$146,679,460

Probable Development Costs

PROJECT PHASING

Project phasing is primarily dependent on market demand, annual absorption rate and the ability of a developer to secure the necessary financing. Securing project implementation approvals and permits through local, state and Federal regulatory agencies can also affect how development might proceed.

From the City perspective, the ultimate controlling factor is how an agreement is structured between the City and a prospective developer or developers. Inherently there are unlimited scenarios on how to proceed with developing this particular project. The measure of public/private partnership needs to be decided as it will have direct implications on who will do what and what will be the timing of each party's obligation to commence improvements. The following are a series of possible options to consider:

- a. The City (public) assumes the responsibility of developing the public infrastructure, roadways and the marina, and defines the development blocks. In this scenario, the City assures itself that ultimate control is exercised, all design criteria for the public realm are adhered to and established up front and the marina is developed as a public feature.
- b. The City could offer the entire project to a single developer or a group of developers with specific controls and conditions of development, such as timing and implementation schedule to prevent land banking.

In either case above, we recommend commencing construction of this project from south to north and west to east. Commencing development away from the waterfront and reserving parcels that abut or are in direct view of the project amenities, such as Ontario Beach Park, the new town green and the marina. Also, this process will assure the City that the entire project will be completed in accordance with the approved Master Plan.

There are three development phasing scenarios. In all the scenarios, it is assumed that the marina, town green, and streets will be constructed by the City. This public expenditure will encourage the development of the housing and retail components by the private sector. Therefore, these infrastructure components are part of Phase IA, and it is assumed that they will be built prior to or concurrent with the first phase of housing development. Also included in Phase IA is the conversion of the terminal building to the SUNY Brockport Natural Resources Center. It is envisioned that this development will be another draw for future residents and businesses therefore completing the development early in the construction process is critical.

While the design team recommends the proposed phasing strategies as the most likely to provide the maximum return from the development, the final phasing approach will be dependent on the developers' priorities and market conditions at the time of construction, and may not resemble these suggestions.

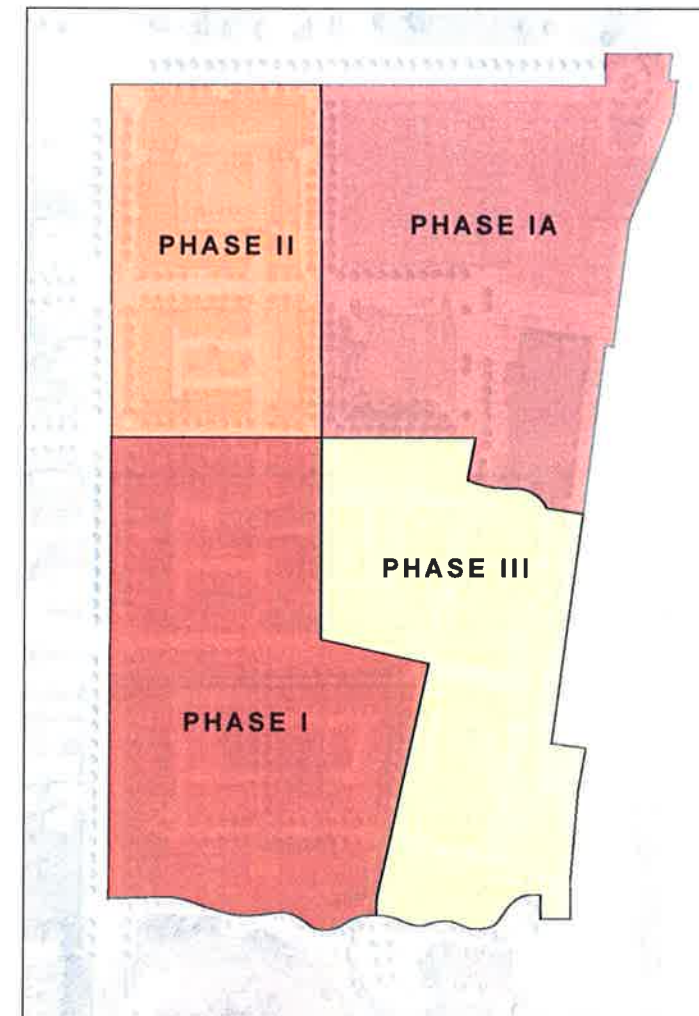
Permitting and Approvals

The master plan team has identified the required permits and approvals to begin construction of the site, including zoning, environmental, and miscellaneous permits. This list does not attempt to identify all the code-related permits that will be required, such as street opening permits, code compliance reviews, certificates of occupancy, etc. These approvals will be the responsibility of the contracting entities once the project is fully designed.

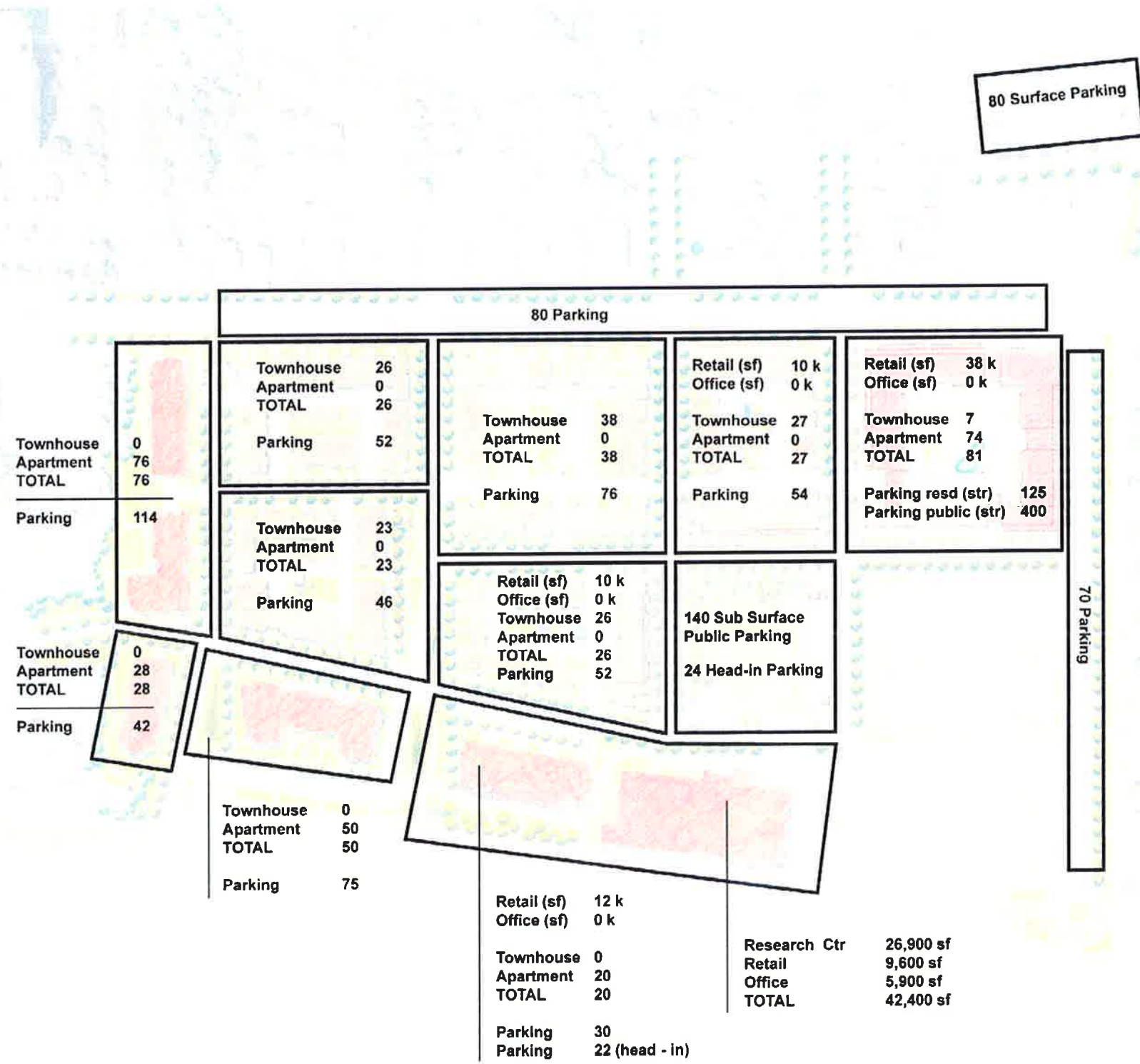
The major issues on the site will be the needed zoning approvals (see the zoning section of this report for more details) and stormwater disposal. There will also be a review of the project under the state's environmental quality statutes (the city intends to prepare and file this document) and coastal zone management act. Neither of these reviews should prove complex. A detailed list of the anticipated approvals is provided in Appendix E, Project Permitting.

Not included in the list of permits is the dispensation of the contaminated soils. This is usually handled during the construction process, but the developer(s) of the site should be prepared to engage the appropriate professionals to address the soils issue.

In developing the overall implementation strategy, the City should carefully consider the permitting scenario and which permits might best be sought with the City as project proponent. It may simplify the overall development process and remove risk from the private development equation.



Phasing diagram - Large block scenario



NET TOWNHOUSE	147
NET APARTMENTS	248
TOTAL UNITS	395
TOTAL RESEARCH	27 (k) sf
TOTAL RETAIL	80 (k) sf
TOTAL OFFICE	06 (k) sf
RESIDENTIAL PARKING	666
STRUCTURED PARKING	400
SUB SURFACE PARKING	140
ON-STREET PARKING	200
LAKE & PARK STREET P	150
OFF-SITE SURFACE P	80
TOTAL PARKING	1636

*Parking Assumptions.
Resd. Townhouse: 2/du
Resd. Apartment: 1.5/du*

DEVELOPMENT CONTROLS

Zoning

The master planning team has conducted a review of the current zoning statutes for the site, including alternative zoning strategies, and has consulted with the City's Director of Zoning as to which approach may be most appropriate. The current zoning is not fully consistent with the proposed development, primarily with respect to some of the lot dimensional requirements. It may be possible, given that the current Harbor Village zone is primarily oriented towards this development, to modify the zoning to reflect the desired development criteria. It may also be possible to file the project under the city's planned development process, which would allow the design criteria to be established for the project without modifying the current zoning statutes.

A more detailed discussion of the current zoning and possible development strategies is included in Appendix C, Zoning Review and Amendments. In determining a final zoning strategy, the overall development approach will be a critical factor. The designation of streets as public or private, and the potential subdivision of the property may have implications for zoning interpretations.

Design Guidelines

To ensure that the development meets the expectations of the community, and that consistency is maintained across blocks built by different developers, a set of design guidelines has been prepared for the project. The guidelines set a palette of materials and finishes for the public realm components of the project. These components are the streets, parks and other open spaces. The guidelines also provide basic architectural controls for building form, relationship to street, and other basic design parameters. The full guidelines are included in Appendix D. These guidelines should be included as part of any developer RFP package issued for the project, to ensure that potential developers work in conjunction with the guidelines from the earliest stages of their projects.

DRAFT

Appendix A

Development Layout Option B

DRAFT

Development option B represents a much higher density of development compared to the preferred option described in greater detail in this document. The Planning Team developed this option to serve the needs of the State of New York SEQRA Process which the City is going to pursue. During the SEQRA environmental Approval Process, the regulators would like to analyze and explore the range of possible development options and densities for the project.

The market research and analysis that was done indicates that a maximum potential of 1,126 residential housing units, 78,000 sf of retail & commercial and up to 76,000 sf of office space can be supported on the Port of Rochester site. Accordingly, the planning and design team developed Option B as a book end to the master planning process. This plan accommodates higher density development, while maintaining maximum open space and preserving the integrity of the community to create a healthy living environment.

Summary of Proposed Program for Option B.

- Number of Townhouse units	162
- Number of Apartments units	538
- Total housing units	700
- Retail Space	80,000 sf
- Office Space	6,000 sf
- Research & Development space	27,000 sf
- Parking for residential units (within the building envelope)	1087 Spaces
- Underground Parking (below the Village green)	140 Spaces
- On-Street Parking	200 Spaces
- Structured parking (portion reserved for public use)	390 Spaces
- Parking along Lake Ave and Park Street	150 Spaces
- Surface parking across from Roger Robach Community Ctr.	80 Spaces
- Total Parking Spaces	2047 Spaces



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Appendix B

Market Analysis and Opportunity

CONTEXT AND ECONOMIC FRAMEWORK

INTRODUCTION AND SUMMARY OF FINDINGS

The City of Rochester hired ZHA, Inc. to assess the market potential for different land uses as a part of the master plan process for the Port of Rochester. ZHA reviewed existing reports and documents, performed interviews and site visits, and analyzed published data to assess the viability for residential, retail, office, and hospitality uses at the Port. In addition, ZHA assessed the local and regional market for marinas.

Market studies use both quantitative and qualitative data to gauge what can be reasonably supported in a given area. Using the research, ZHA first determined a likely trade area for each use, calculated the supportable square feet in the given trade area, and then took a likely capture rate for the uses that would be located at the Port. ZHA's assessment of area economic conditions found that the Port site could reasonably support the following:

Residential:	1,126 new units	
Retail:	GAFO	17,000 sf
	Convenience	28,000 sf
	Eating and Drinking	33,000 sf
Office:	51,000-76,000 sf	
Hotel:	Limited opportunity for boutique/condo hotel	
Destination Use:	Very limited opportunity	
Marinas:	Likely demand for new slips, especially with coordinated land side uses proposed.	

These amounts are projected to be supportable within the next 5-7 years, with known data at the time of this report and without the introduction of additional extraordinary circumstances that would change the given market.

Rochester and the Metropolitan Area

The City of Rochester is located in Monroe County, and is positioned between the other West/Central New York metropolitan areas of Buffalo and Syracuse. It is approximately one hour from Buffalo via the New York Thruway; and it is just ½ hour further to Niagara Falls, NY and Ontario, Canada. It is about 1 1/2 hours west of Syracuse. Rochester's metro area is connected to these cities and other areas via I-90 (the New York Thruway) and I-390. Rochester's airport connects the region to areas further away. There are approximately 150 daily flights to 19 national and international destinations. Rochester is also one-hour from Buffalo's international airport, providing additional connectivity to the region.



Rochester built its reputation in imaging, with famous companies Kodak and Xerox headquartered there. These companies, especially Eastman Kodak, left an indelible legacy on the area, with their contributions to arts and community. While these companies still maintain some operations in Rochester, they have scaled back over time and other industries have left the City. Changes in the economy and technology have changed the complexion of the City's employment. Like many ex-industrial cities, the City of Rochester has lost population over the past several years. The metro area, however, has slightly gained population, concentrated in the suburbs, mostly southeast of the downtown.

ECONOMIC FRAMEWORK

Region

Comparative Metros' Rankings Out of 300 CBSAs in Select Indicators			
	Pop	Total EBI	Total Retail Sales
Columbus, OH	31	30	28
Indianapolis, IN	35	31	35
Milwaukee, WI	36	38	36
Buffalo-Niagara Falls	46	49	51
Rochester	49	52	56
Syracuse	76	79	79

Source: Sales and Marketing Management "Survey of Buying Power", ZHA, Inc.

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Where Rochester ranks 49th in terms of size, the Metro Area ranks 56th in retail sales and 52nd in effective buying income. Metros with strong growth and income score higher in effective buying income and have higher sales.

Among the 300 United States metro areas, Rochester ranks 49th in terms of population. Rochester is comparable in size to the metropolitan areas of Birmingham-Hoover, AL; Salt Lake City, UT; and Oklahoma City, OK. Being in the top 50 largest metro areas gives the area a national presence and recognition. Rochester has also received recognition in national publications' rankings—19 of 140 in Popular Science's "Top Tech Cities," and 4th of 50 for innovation in Richard Florida's book *The Rise of the Creative Class*. These accolades, as well as

Rochester's top-rated educational institutions bring the area positive national attention.

Population Growth Comparison Rochester and Nearby Metro Areas					
	1990	2000	2005	Change in Population 1990-2005	% Change
Rochester	1,002,410	1,037,831	1,043,266	40,856	4.1%
Buffalo	1,189,288	1,170,111	1,156,286	(33,002)	-2.8%
Syracuse	659,864	650,154	656,857	(3,007)	-0.5%

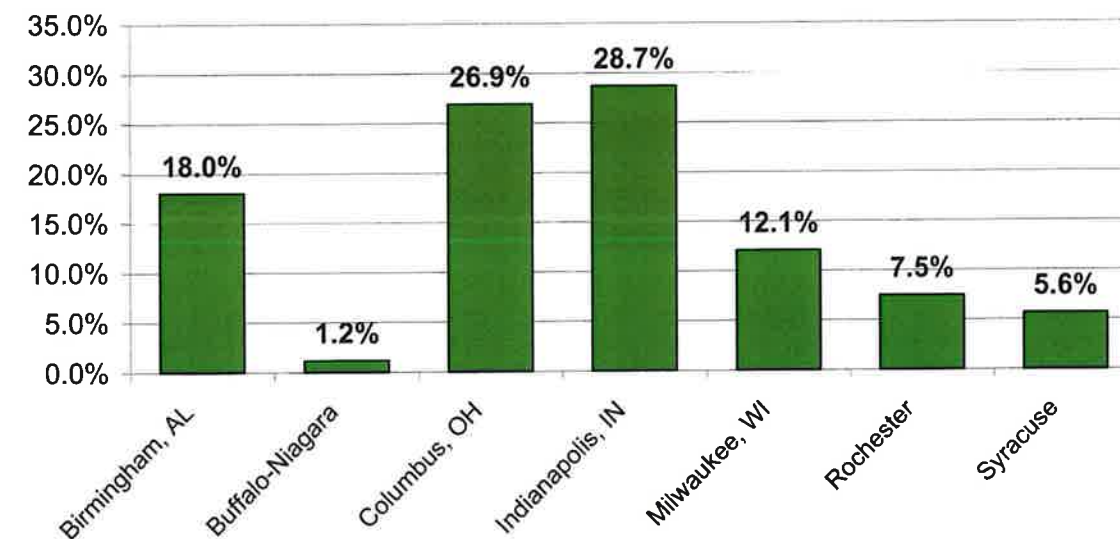
Source: Claritas. ZHA, Inc.

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The Rochester Metro Area has fared better than its regional peers in terms of population growth trends. The Rochester Metro Area has shown some increase in population over the last fifteen years while Buffalo and Syracuse continue to struggle to regain their 1990 size.

While the Rochester Metro has excelled in comparison to other metros in the (region, nationally,) it has not kept pace with the growth.

Comparative Metro Household Growth 1990-2005



Source: Claritas, Inc; ZHA, Inc.

The number of households in the Rochester metro grew by 7.5 percent in the 1990-2005 time period, and though that is at a faster rate than its neighboring metro areas of Buffalo and Syracuse, when it is compared to similarly-sized peer metros nationwide, it is growing substantially more slowly. It is also growing more slowly than New York State and the United States as a whole, which grew by 8.2 percent and 20.7 percent respectively.

In the Rochester Metro, the growth in the region is taking place outside of the City. Like many ex-industrial northern U.S. cities, the City of Rochester has lost population over the past several years. Most of the metropolitan growth has occurred in the suburbs southeast of the City. Removing the household population of Rochester from the metro numbers reveals a faster pace of growth for the metro area.

Rochester City and Metro Household Growth 1990-2005

	2005 Pop	Growth 1990-2005	% Growth 1990-2005
Rochester	86,356	(7,256)	-7.8%
Metro (net of city)	316,050	35,187	12.5%

Source: Claritas, ZHA, Inc

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Population 1990-2005

	1990	2000	2005
Rochester, NY	231,642	219,773	213,435
Monroe County, NY	713,968	735,343	737,839
Rochester Metro Area	1,002,410	1,037,831	1,043,266

Source: Claritas and ZHA, Inc.

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In total population, between both 1990-2000 and 2000-2005, the City lost an average of 0.5 percent of its population each year while the Metro area gained 0.4 percent per year between 1990-2000 and 0.1 percent annually between 2000 and 2005. In all, however, this growth was less than half of the growth rate of the state of New York and one-sixth of the rate of growth of the U.S. overall.

Change in Population 1990-2005

	Average Annual Growth Rate		Total Population % Gain/Loss
	1990-2000	2000-2005	2000-2005
Rochester, NY	-0.5%	-0.58%	-7.9%
Monroe County, NY	0.3%	0.07%	3.3%
Rochester Metro Area	0.4%	0.10%	4.1%
New York State	0.5%	0.32%	7.2%
USA	1.3%	0.97%	18.7%

Source: Claritas and ZHA, Inc.

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In 2005, Rochester had 213,435 residents. This comprises 28 percent of Monroe County, the county in which the City resides, and 20 percent of the Metro area.

Income

In comparison with the peer cities above, Rochester ranks below its size ranking in "buying power." Income is important in attracting services and investment to an area. While it is not the strongest nationally in buying power, Rochester has a relatively high median household income, which suggests a stable economy.

Median HH Income Comparison Rochester and Nearby Metro Areas

	1990	2000	2005	Change in Median HH Income 1990-2005	% Change
Rochester	\$34,227	\$44,345	\$48,740	\$14,513	42.4%
Buffalo	\$28,084	\$38,638	\$43,284	\$15,200	54.1%
Syracuse	\$31,048	\$40,057	\$44,581	\$13,533	43.6%

Source: Claritas, ZHA, Inc.

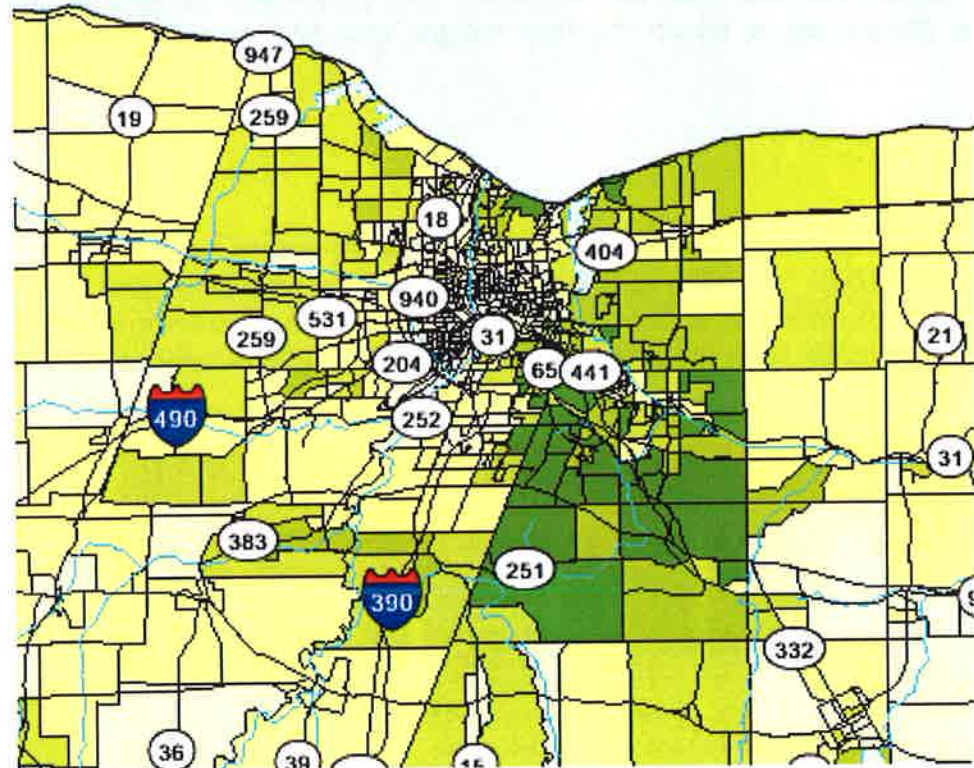
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Rochester’s median household income is above the national average of \$47,700. Rochester’s median household income is also above the average for Buffalo and Syracuse.

As in population growth, the higher income households are positioned outside of the City. The most growth in households and in income is happening in the suburbs in the southeast of the metro area.

The map below indicates the percentage of households earning \$100,000 or more by Census block group. The darker green area southeast of the city indicates a higher percentage of households earning this income level.

Census 2000 Percent of Households Earning \$100,000 or More by Census Tract



Source: 2000 Census

Site Context

The Port of Rochester is located in Monroe County, NY in the Rochester metro area.

Port of Rochester Site Context



Source: ZHA, Inc and Microsoft MapPoint.

The site is uniquely located on the shore of Lake Ontario and at the confluence of the Genesee River. It is located in the neighborhood of Rochester known as Charlotte, which until 1916 was an independent town and before 1869 was the town seat of neighboring Greece. Its origins are rooted in its destination as a lakeside beach resort in the 1800s and 1900s, having had a park that was popularly known as the "Coney Island of the West" complete with amusement rides and other attractions. The park's success as an attraction was largely due to the establishment of a train line there which made access from Rochester's inner neighborhoods possible. Reminders of the park's glory days remain in the present Ontario Beach Park, notably the Denzel Carousel and the bathhouse, now a community center.



Former park bathhouse at the Ontario Beach Park, now a community center, is a reminder of the area's history. Photo: ZHA, Inc.

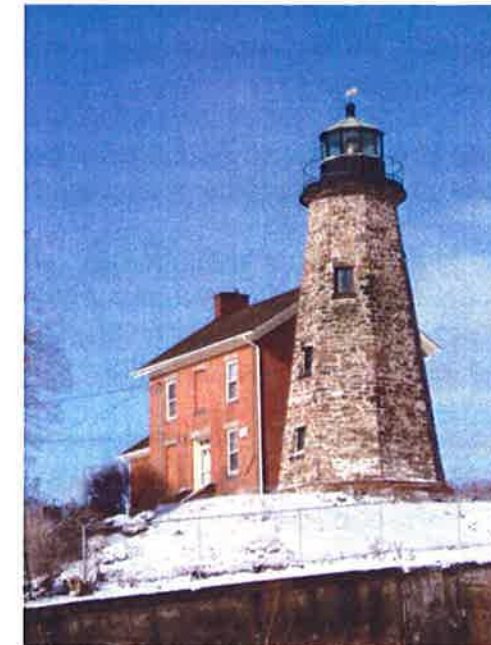
The area also had ties to industry and commerce from its establishment as a port by the U.S. government in the early 1800s to the rise and fall of the industrial age in 20th century. The end of the industrial era now offers the riverfront the opportunity to return as a place for people to gather for recreational and entertainment purposes.



The swing bridge is a reminder of the Port area's industrial legacy. Photo: ZHA, Inc.

The site's adjacency to the Lake and River offer both opportunities and challenges. While the site offers vistas unknown in other parts of Rochester and

access to water sports, winters can be harsh, and the site is a 15-20 minute drive from Downtown Rochester. The Charlotte neighborhood and Ontario Beach Park is perceived by area residents as primarily a summer destination, which gives the area a seasonality. The Site lies on what is essentially a peninsula between the municipalities of Greece and Irondequoit. The historical Charlotte Lighthouse, one of the oldest on the Great Lakes, is an anchoring symbol for the neighborhood and lies to the south of the Port site.



The Charlotte Lighthouse is a symbol for the surrounding neighborhood as well as a historic landmark. Photo: ZHA, Inc.

The Port site connects to the rest of the metro area principally by Lake Avenue, a north-south route, and the Ontario State Parkway which connects the area to I-390.

RESIDENTIAL ANALYSIS

Use Overview and Description

Residential uses form the backbone of any community. In real estate development, having residents within access of a site is important to the viability of other uses. A strong residential area supports additional commercial uses—both retail and office—which in turn often serve to attract additional residents. Because of the size and qualities of the site and preexisting stakeholder preferences, ZHA

approached residential analysis from a “maritime village” positioning strategy, including more “urban” or “in-town” housing types. In other words, it would not be preferred for the site to consist of single family houses.

Recent trends have led to important changes in the types of housing products available. Downtown housing has experienced a resurgence, as has housing in “lifestyle communities.” Demographic trends are partially fuelling this shift. Overall, the nation is becoming older. As the Baby Boomers age, they will require different types of housing. The Joint Center for Housing Studies at Harvard University’s *State of Nation’s Housing 2005* reported that some of these important factors in ongoing housing type changes are:

- Baby Boomers are entering their 50s and 60s with unprecedented home equity, giving them options as they consider their retirement years.
- Many Boomers are opting to cash out of their homes, which have appreciated perhaps beyond their expectations, and move into a different living situation—in a condominium or apartment either near their children, near their present homes, or in a retirement community.

Additionally, this study acknowledges the trend that the share of married couples dropped 10 percent between 1980 and 2000. This was mostly concentrated among married couples with children; and, removing immigrant households, this number drops further.

The U.S. Census also confirms this trend, and in its August 2005 publication “Examining American Household Composition” reports that for the first time in the history of the Census, the most common specific household type was singles. This is likely to be a trend that continues, according to those watching the real estate markets, due to the aging population and new preferences in housing.

The *State of the Nation’s Housing* report states that “The shifting age and family composition of households will drive changes in the types of homes and types of home improvements most in demand. As they move into their pre-retirement years with peak income and wealth, the Baby Boomers will continue to support demand for trade-up houses, second homes, and high-end improvements performed by professional contractors. At the same time, the growing number of singles and unmarried couples, as well as the shrinking share of families with children, will drive housing demand toward multifamily units, townhouses, and condominiums.” These segments are where residential development will grow in the coming years. Having product to capture this demand, then, is important in any area’s economic development strategy.

While large downtowns of metropolitan areas have seen an upturn in interest, this trend is also being seen in a “densification” in suburban areas. Unlike the traditional image of “dense” apartment communities primarily inhabited only by those who could not afford a single-family home, these communities are cropping up in response to market demand for a particular lifestyle—there is the “renter-by-choice” market, for example, that includes renters who choose to rent for convenience rather than affordability. These renters choose apartments with high-end finishes and amenities that compliment an active lifestyle.

This kind of “lifestyle” housing product is the likely strategy to be pursued by developers on the Port site, both because of current nationwide trends and because of the unique opportunity that a lakeside and riverfront site offers.

Housing Market in Rochester

Though the nationwide trends are moving towards the greater viability of multifamily housing, several factors are important to consider when examining its suitability for Rochester specifically. One is housing appreciation. Rochester ranked 204 in housing appreciation out of 275 metros nationwide. As mentioned above, the drive towards multifamily living by empty nesters and retirees is partially driven by households in these categories having extraordinary equity in their homes that can be applied toward buying a new condominium, perhaps leaving additional funds to be put towards cushioning retirement savings. If households in this region have not seen the same spike in housing values and thus, do not have as much equity, this will be less appealing. This is particularly true if moving into a newly-built condominium, which will cost only marginally less to build in Rochester than it would in another metropolitan area, if at all.

What these issues mean to the analysis of residential demand for the Port site is that particular attention will need to be given to income and lifestyle considerations and more conservative capture rates will need to be assumed. Also, the analysis is “product-driven,” meaning that it is a targeted marketing strategy looking at the available households who have been shown to find certain housing types appealing in a given geographic area and anticipating that by providing housing types not already available, they could be convinced to choose to move to that location.

Overview of Existing Supply

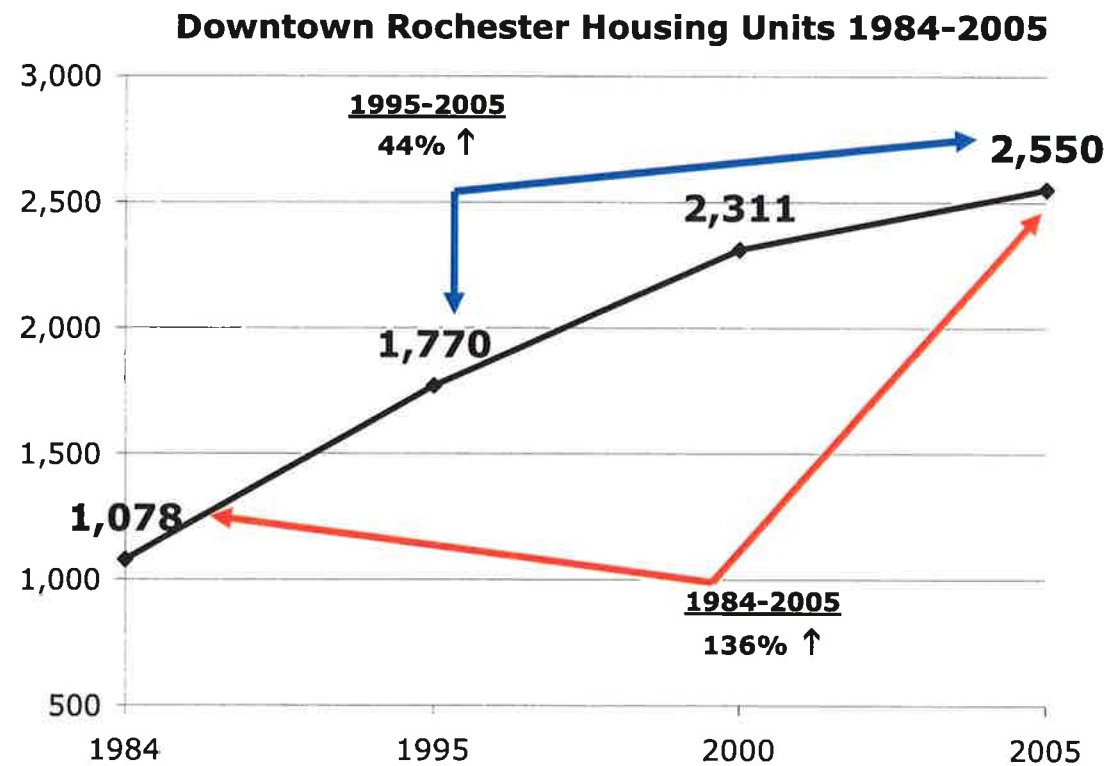
Existing For Rent

Because of relatively moderate prices on single family housing in the Rochester area, with adequate demand for that particular product, multifamily housing has not been a priority to developers as it has in some metro areas.

However, in recent years, the “loft” style apartment trend and downtown living trend have caught on with greater vigor. These developments are continuing to be proposed in the downtown region. The existing and recently developed multifamily housing has consisted mostly of for-rent apartments, rather than condominiums. Developers were reportedly wary of the product, which had not been tested in the market, and condominiums and townhomes were generally seen as simply a more affordable product to the desired single family home. This year, however, the Sagamore on East project, offering 23 luxury condominiums, was able to pre-sell the majority of its units, and acted to change the minds of developers in the area. The chart below shows the large increase in housing units in the downtown in the past 10 and 20 years.

homes/small number rentals. The latter caters to the large student population in Rochester, being the most affordable option.

The below table shows data about select competitive apartment complexes in the Rochester metro area.



Source: Rochester Downtown Development Corporation “Survey of Downtown Rental Housing” Winter 2005., ZHA, Inc.

The existing rental market consists of offerings in three general categories: older apartment complexes, newer loft conversions downtown, and converted

Select Competitive For-Rent Residential Product in Rochester NY Metro 2005						
Name	Yr Built/Renov	Address	# of Units	Advertised Rent Range	Approx. Rent/SF	Amenities/Other Notes
1600 East Avenue Apartments	1956/1998	1600 East Ave	164	\$699-1875	\$1.50	Fitness Center, Media Center, Billiard Room, Cable Included, Heat & Electric Included, Garage Parking, Concierge Services
Buckingham Commons (Artcraft Optical Building) Under Construction	early 1900s / 2005	85 Allen Street	36	945-1200	\$1.19	Heat/AC, Rooftop Garden, High Speed Internet Available
Chestnut Square	1905/1995	328 East Main St	86	\$525-\$600	\$0.79	Elevator, Includes Heat, Hot Water, Cable
Chevy Place	1999	200 East Avenue	77	\$970-1350	\$1.13	Alarms, Elevators, 80% Market Rate, 20% Section 42
Corn Hill Apartments and Townhouses	1980s	715 Clarissa St	80	\$665-1050		24-hour maintenance, Off Street parking
Corn Hill Landing	2005	290 Exchange Blvd	127	\$690-2250	\$1.34	Downtown, Riverfront, Underground Parking, Gym
Fetzner Square	2003	700 Fetzner Rd	52	\$875-\$1075	\$0.90	Private Entrances, Fitness Ctr
Knowlton Lofts	1999	69 Cascade Dr	14	\$1450-\$3200	\$1.45	Covered Parking, Hardwood Floors, Views, Patios with barbeque, Security system, High Speed internet, ADA
Larkin Creek	1994	100 Annie Ln	168	\$725-\$1020	\$0.79	Alarms, Pool, Clubhouse, W/D in Unit
Long Pond Shores	1978	700 Pond View Hts	250	\$520-995	\$0.68	Pool, Waterfront Location, Boat Launch, Rent does not include gas or electric, 100% occupancy
Medical Arts Building	1929/2005	277 Alexander Street	31	\$780-\$2160	\$1.30	Rooftop Deck, Some units with own laundry, gas fireplaces, security
Michaels-Stern Loft Apts	2003	1 Pleasant St	45	\$550-1200	\$1.01	Adaptive Reuse, Security Sys, Elevators
Riverview Lofts (pre-leasing)	2006	176 Water St	36	\$600-995	n/a	Covered Parking, Security, High Speed Internet Available, Storage, ADA compliant.
Spanish Gardens	1972	123 Spanish Trail	220	\$625-\$925	\$0.89	Pool, Cable TV, Fitness Ctr, Rent does not include gas,electric, water or sewer, 98% occupancy
Temple Building Lofts	1925/2003	14 Franklin St	40	\$900-1800	\$1.05	

Source: Apartments.com and other search engines, ZHA, Inc field research.
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Rents in downtown Rochester range from \$0.68 per square foot for older complexes (and converted residences) to \$1.34 in the newly built Corn Hill Landing.

The Rochester Downtown Development Corporation conducts a regular survey of housing downtown. The survey has not tracked the rent per square foot

from respondents for long (only since 2004), and does not have a high response rate on this question. However, those who responded to the question reported a range of \$0.65 to \$1.35 per square foot, which corresponds to ZHA's research based on advertised and reported pricing by the management.

The Winter 2005 survey found that there was a vacancy of 3.9 percent in 2005 (down from 4.6 percent in 2004) for both market rate and subsidized units. For purely market-rate units, the vacancy rate was 5.2 percent, also down from 2004.

The survey also reported that in the market, the studio and 1-bedroom units are most desired and have the lowest vacancy (2-2.8 percent for studios and one bedrooms), though Corn Hill Landing reported having its largest units leased first. Another interesting point in the survey was the desired features of apartments, including: secure parking facilities, free utilities, storage space, and security systems.

For Sale Multifamily and SF Attached

The existing and recently developed multifamily housing has consisted mostly of for-rent apartments, rather than condominiums. Developers were reportedly wary of the product, which had not been tested in the market, and condominiums and townhomes were generally seen as simply a more affordable product to the desired single family home. This year, however, the Sagamore on East project, offering 23 luxury condominiums, was able to pre-sell the majority of its units, and acted to change the minds of developers in the area. There have not been as many for-sale condominium and in-city townhome projects in Rochester as there have been in many metropolitan areas, and so the Sagamore on East was the an important proving ground for that particular market niche. The chart below shows some representative asking prices for attached single family properties.

**Representative Rochester Attached Residential Resale
2005**

Area	Yr Built	SF	Asking Price	Approx. Price/SF
1090 Park Ave	1993	3,658	\$669,900	\$183.00
111 Cornhill Place	1986	1,146	\$129,900	\$113.00
2 Greig St	1986	1,566	\$139,900	\$89.00
132 Cornhill Place	1986	1,313	\$119,900	\$91.00
360 Frederick Douglas St	1982	1,286	\$119,900	\$93.00
397 Alexander St		1,226	\$89,900	\$73.00
Average		1,699	\$211,567	\$107.00

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The newest of these, built in 1993 and substantially larger than most attached single family products, commanded \$183/sf, while the older product hovers between \$80-\$100/sf.

Residential Market Demand

Migration

To determine the likely market for new residential product residential product at the Port of Rochester, it is necessary to determine the most likely area to draw from, and one way to do this is to examine who has moved to the Rochester area in previous years. Using IRS data, which tracks where households file from each year, it is possible to determine where potential new residents would move from.

**Top 5 Origin Counties of New Households Moving to
Monroe County
2003-2004**

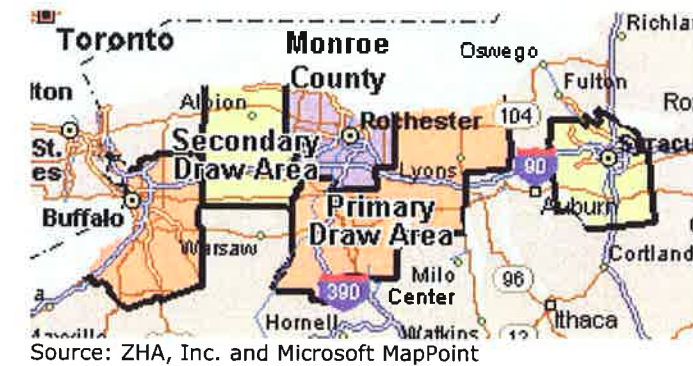
From County	In-Migration	%
Wayne County	767	7.9%
Ontario County	673	7.0%
Livingston County	489	5.1%
Erie County	442	4.6%
Orleans County	310	3.2%
Monroe County Total In-Migration	9,667	

Source: IRS, ZHA, Inc.

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Between 2003-2004, the majority of new residents to Monroe county came from within the metro area and the counties immediately surrounding. These counties will provide both the primary and secondary draw areas. Monroe County is the first level drawn from for new residents of the potential housing project at the Port, followed by the primary and secondary draw areas.

Residential Draw Areas



Source: ZHA, Inc. and Microsoft MapPoint

- Monroe County
- Primary Draw Area
- Secondary Draw Area

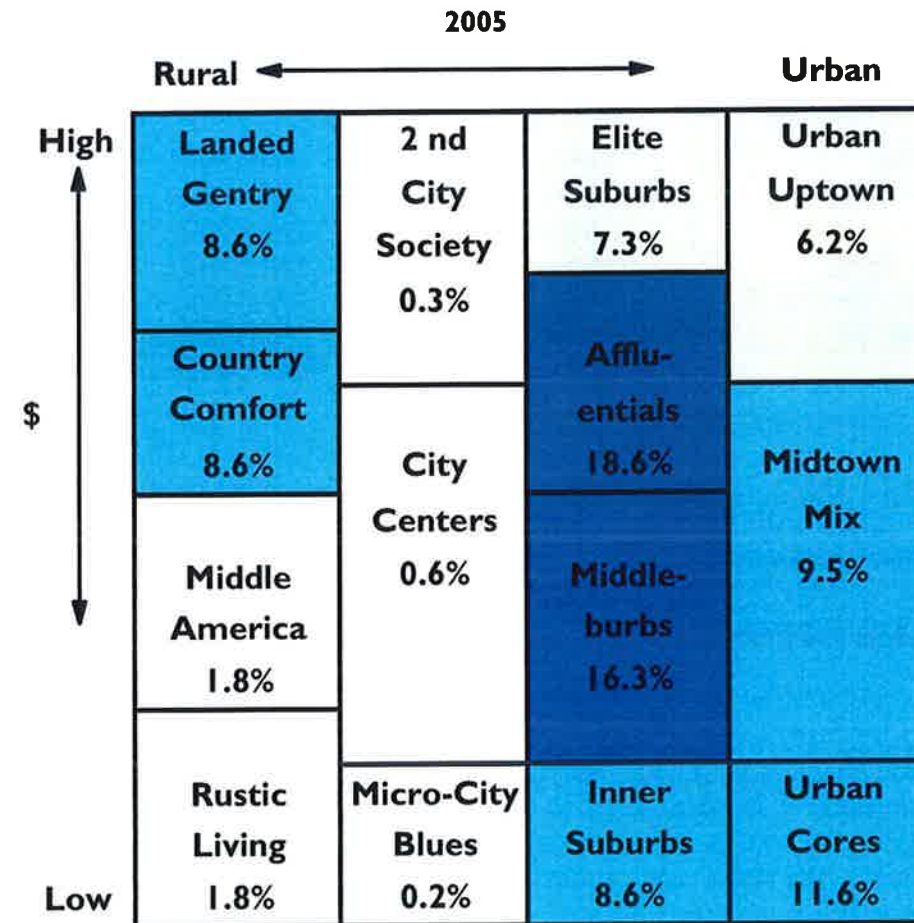
Likely market

To create the kind of atmosphere desired by the City at the Port and the amount of developable land available, it is likely that the residential will be a

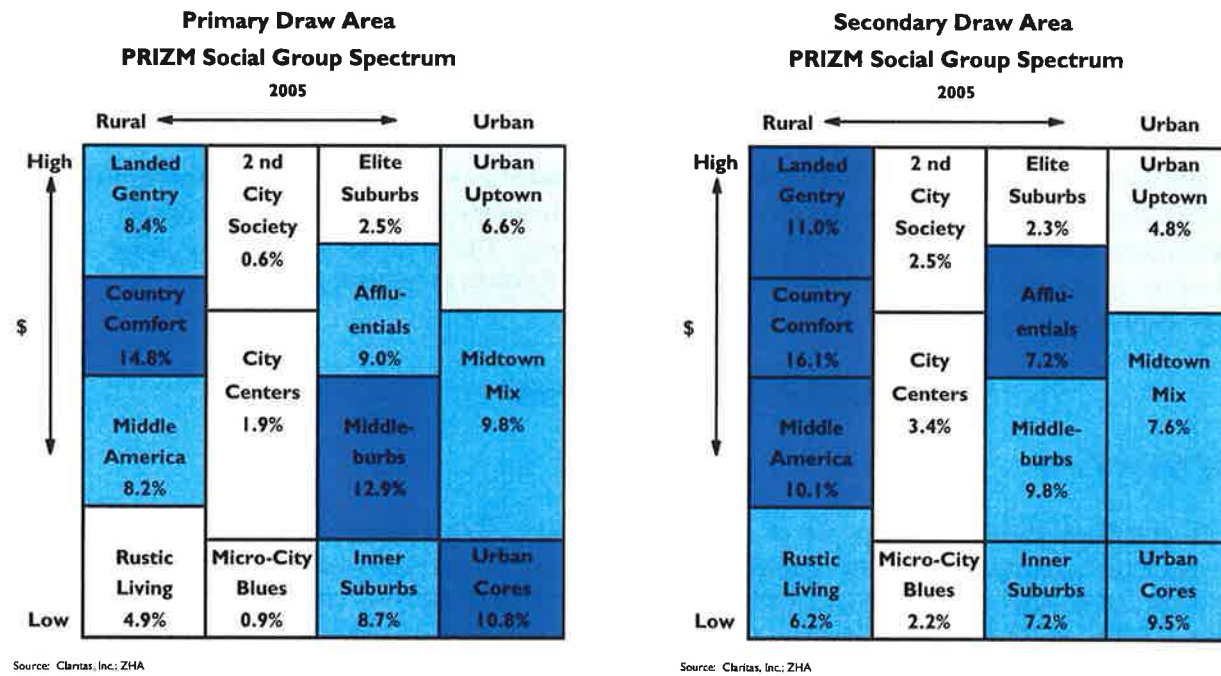
mixture of multifamily units and single family attached. The increasing popularity of multifamily residences in the downtown as tracked by Rochester Downtown Development Corporation signals an important willingness to consider this product. Though the majority of the multifamily housing projects are all taking place in Rochester's downtown, and the site of the Port would provide a different kind of experience than any existing products in the market. It would not have the advantage of adjacency to the downtown and its center of area business or of having been tested in the marketplace. However, the Port's location on the lake near recreational possibilities provides for another market niche to be explored.

To get closer to the kinds of households represented in the draw areas determined by the areas in the IRS migration data, ZHA uses Claritas's psychodemographic PRIZM categories. There are 66 individual lifestyle groups into which a household could fall, and these groups are grouped into 14 Social Groups, which can be generally categorized as having certain income levels and having certain propensities for more "urban" or "rural" lifestyle preferences. Charting Monroe County's PRIZM distribution across this matrix yields the following.

Monroe County PRIZM Social Group Spectrum



For the most part in Monroe County, there is a general tendency toward the middle ground on the spectrum, with certain concentrations at either extreme.



The total number of households in each draw area does not represent the demand for new housing product. Only the households moving in the next five years and earning above a certain income level that could afford the newly-constructed units are considered to be part of a likely market group. Also, because of the need to build new product at the Port site (there are, for example, no existing residences to renovate), the price points of the units will reflect a higher end market rate product and necessitate a certain level of income to support. The move rates and percent of households by income are based on national averages for these lifestyle groups and applied to the households in the draw areas.

The total number of households meeting these criteria are below by lifestyle grouping.

Total Households in Lifestage Groups Earning > \$50,000 & Moving in 5 Years	
Young Professional Singles/Couples	13,449
Empty Nest	10,893
Retirement	13,654
Total	37,996

Source: Claritas, ZHA, Inc.
 F:\50030 Port of Rochester\Work Folder_Rochester\[HousingRochester.xls]Sheet2

To find the likely market for the kind of product that would be available at the Port site, ZHA uses the numbers of households falling in "urban-leaning" lifestyle groups within the determined draw areas. These urban-leaning households fall into three groups: young professional singles and couples; empty nesters; and retirement. They share similar characteristics as shown below.

Lifestage Group Characteristics and % of Monroe County, NY Households

	Age Range	Housing Type	% of Monroe Co HH
Young Professional Single/Couples	<40	Mostly Rent	21%
Empty Nest	45-55+	Own	14%
Retirement	55-65+	Mostly Own	18%

Source: Claritas and ZHA, Inc.
 F:\50030 Port of Rochester\Work Folder_Rochester\[HousingRochester.xls]LifestageGroups (2)

Not all of these households will move to the Port site; a reasonable capture is determined based upon market conditions. Taking a small percentage of the available from each lifestage group yields the amounts of households in the following table.

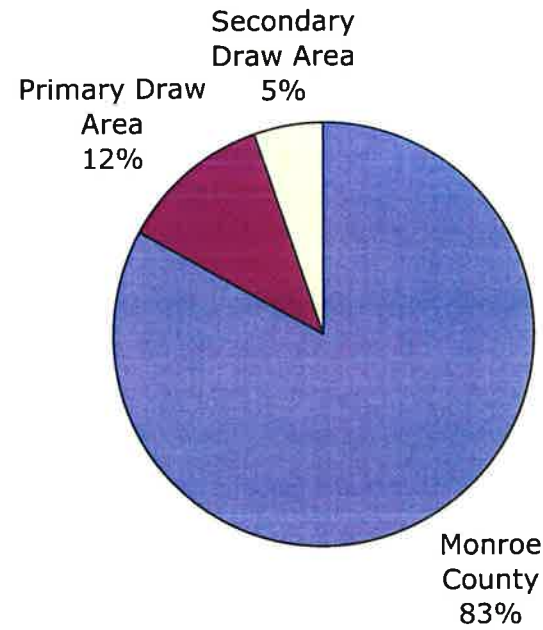
Net New Housing Units by Lifestage Group Port of Rochester 2006-2013

	Low	High
Empty Nesters and Retirees	260	420
Young Professional Singles and Couples	540	650
	800	- 1,070

Source: Claritas, ZHA, Inc.
 F:\50030 Port of Rochester\Work Folder_Rochester\[HousingRochester.xls]hhbylifestageGroup

These new residents are mostly drawn from Monroe County. The distribution is as follows:

Households by Draw Area



Source: Claritas, Inc and ZHA, Inc.

The suggested distribution of these potential households are as follows:

Multifamily for-sale	300-450 units
Multifamily for-rent	400-500 units
Attached Single Family	80-120 units

Based upon market research, smaller units are the most desirable and especially for rental units, have the lowest vacancy rates. However, it is likely that because of this location and price point, the location might be appealing to a more mature resident who may want 2 and 3 bedroom apartments. In other markets serving the empty-nest niche, these larger units were highly desirable.

Units are likely to sell in the \$125-\$175/sf range and to rent in the \$1.15-\$1.40 range. These prices have been supported by recent projects and rents in the market. Because of the price threshold that is likelier to be lower in this market than in other metro areas, the residential buildings are likely to be stick built, and no higher than five stories.

In the placement of residential on the site, it should take advantage of views and access to the water and related amenities while at the same time maintaining

some separation, so that there is not a constant disruptive flow of entertainment use patrons through the residential areas. The intended extension of River Street would likely aid in this effort by redirecting some traffic that would normally travel up Lake Avenue and onto the site.

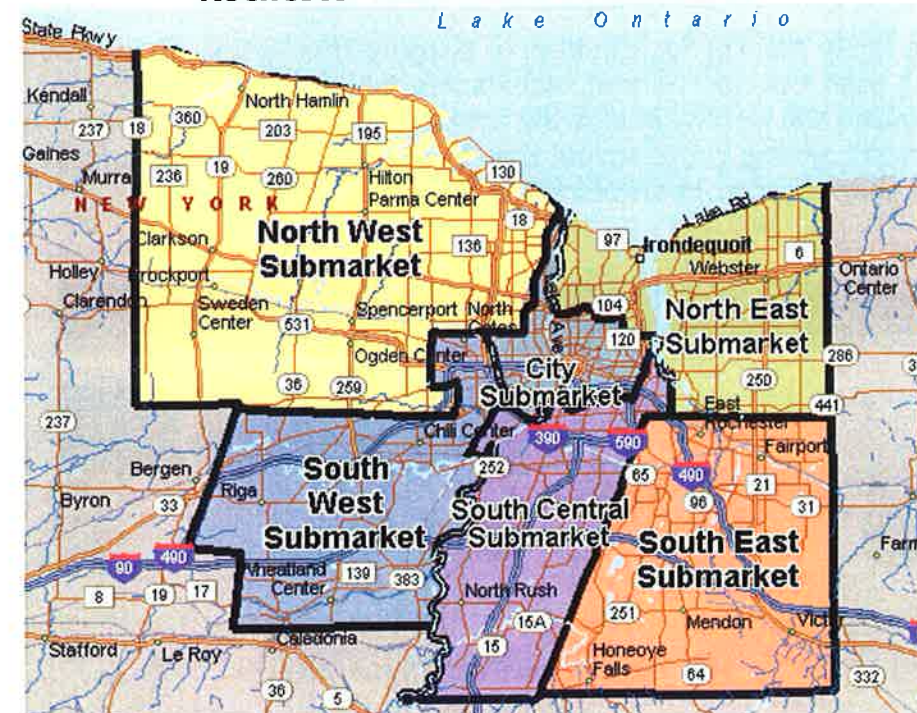
The reuse of the Ferry Terminal building is likely to be an issue with potential residential developers because its vacancy creates uncertainty. However, at least one developer ZHA spoke with expressed that this was not a huge risk in his view. Still, having a quality use determined for the Ferry Terminal would create a stronger and more marketable site.

OFFICE MARKET ANALYSIS

Market Overview

In the Rochester market, as of the end of 2005, there were 15.3 million square feet of competitive office space. Of this, slightly less than half—7.2 million square feet, is in the Central Business District. The remainder—8 million—is suburban. The majority of suburban office space is concentrated in Rochester’s South East and South Central submarkets, especially in the towns of Brighton and Perinton. The submarkets are illustrated on the map below.

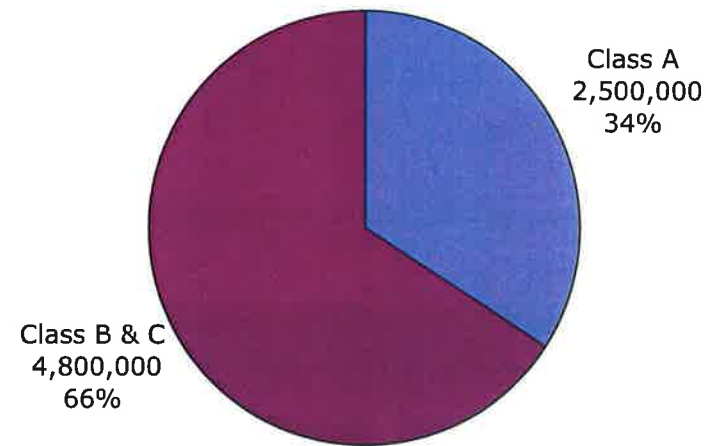
Rochester Area Office Submarkets



Source: CBRE Rochester, ZHA, Inc, and Microsoft MapPoint.

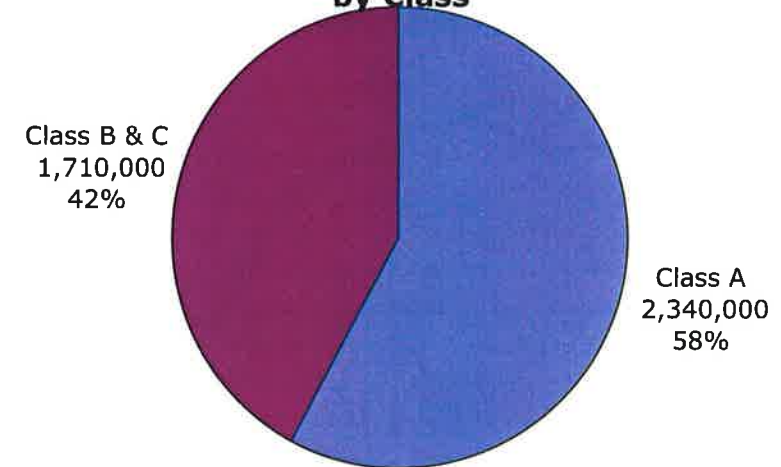
There is a clear preference for suburban space in the market figures. The suburbs have a larger percentage of the total market's Class A space, suggesting that the majority of new building has been happening outside of the city, something that is confirmed in reports by area real estate experts. Though the city has been seeing some construction of office space—in loft buildings and mixed-use projects—the amount is not significant enough to impact the market supply. Furthermore, because of the recently burgeoning interest in downtown living as well as tax breaks to developers for refurbishment of space, the CBD space has witnessed a number of Class B & C buildings being pulled from the for-rent inventory to be renovated into housing. This is weakening the CBD's share of total office space, and as newer construction happens outside of the city, the Class A space may be downgraded. The majority of space in the CBD remains in the B and C classes, versus the suburban submarkets which have a higher percentage of their office space as Class A, as is illustrated in the following chart.

CBD Office Space by Class



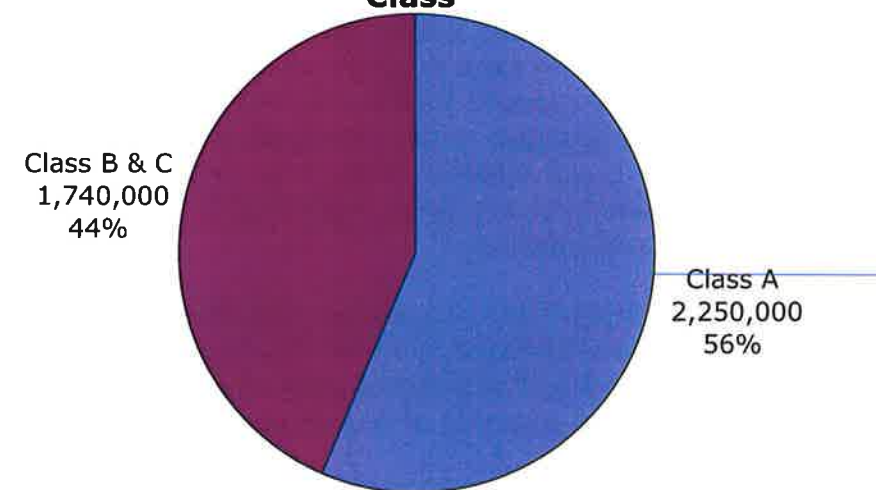
Source: CBRE Rochester, ZHA, Inc.

Suburban South Central Office Space by Class



Source: CBRE Rochester, ZHA, Inc.

Suburban South East Office Space by Class

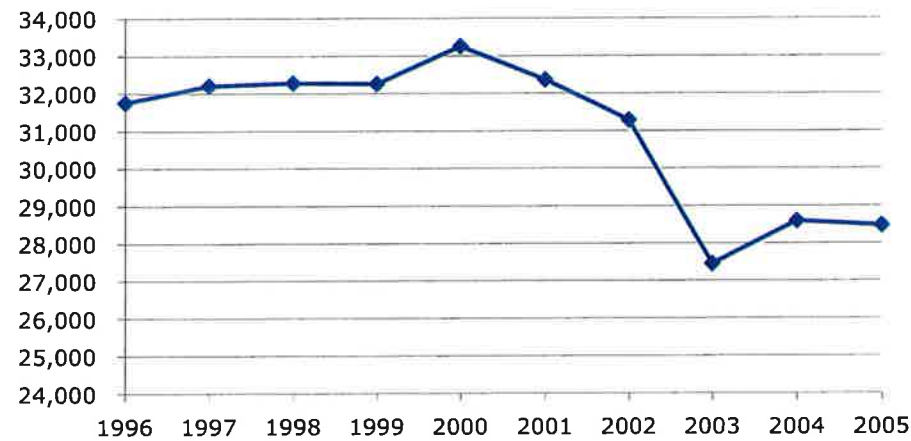


Source: CBRE Rochester, ZHA, Inc.

In 2005, the Rochester CBD had negative absorption, and a high vacancy rate—especially in the B and C space. Class A space was in line with suburban properties with a vacancy rate of 14.5 percent, but up from previous years—at the end of 2004, vacancy for class-A space in the CBD was 9 percent. However, this is in line with vacancy rates seen in 2001-2003, when they ran in the 14-15 percent

range. The other classes of office were at 31.8 percent vacant, reflecting their redundancy in the market.

Estimated Downtown Employees



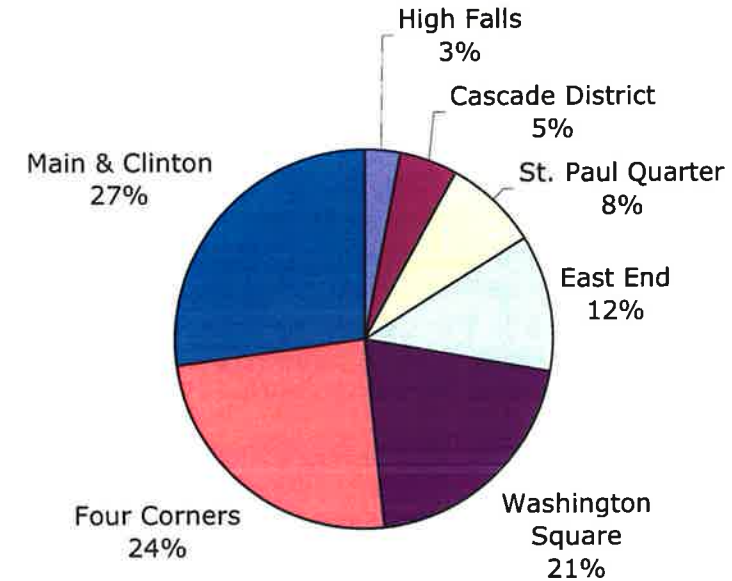
Source: RDDC Survey of Rental Housing Winter 2005, ZHA, Inc.

The results of the redundancy of the B & C space and its removal from the market is reducing the amount of workers downtown. Using the Rochester Downtown Development Corporation's data on total office space in the downtown and dividing this by a standard per-square-foot figure, the results of which are in the chart above, show this reduction over time. This kind of loss of customers is likely to impact other uses, if it is not offset in some way. However, the good news is that many of those office buildings have been converted to residential, increasing the numbers of residents in the downtown.

Rents for Class A space in the CBD range from \$18.00-\$25.00 per square foot with the effective average at \$20.00/sf, up from the previous year when the average was \$18.00. Class A space in the suburbs runs slightly lower ranging from \$16.00-\$21.00/sf, with an effective average of \$18.00/sf, which has remained relatively steady from 2004.

The Rochester Downtown Development Corporation tracks office space performance in the downtown (a slightly different definition from the CBD above). The numbers from the RDDC contain non-competitive space as well, and cover a total of 9.8 million square feet in 110 buildings. Of that, 7.5 million square feet are in 91 competitive buildings. In their inventory, there are 9 buildings with Class A space, totaling 2.26 million square feet.

Percent of Space by Downtown Submarket



Source: Rochester Downtown Development Corporation "Survey of Downtown Office Space" May 2005., ZHA, Inc.

May 2005 Rochester Downtown Office Space by Neighborhood Ranked by Vacancy

Neighborhood	% Vacant	Change in Vacancy 04-05	Net Leasable Office Space
Main & Clinton	37.60%	1.40%	2,281,456
St. Paul Quarter	32.60%	0.10%	667,616
East End	24.80%	1.10%	986,945
High Falls	17.90%	-3%	259,409
Four Corners	11.10%	-0.20%	2,053,418
Cascade District	9.10%	No change	421,062
Washington Square	4.60%	2.30%	1,722,511

Source: RDDC Survey of Downtown Office Space, May 2005

The data about which neighborhoods and formats are preferred helps to indicate what kind of office “niche” has the most demand. The neighborhoods that have fared the best are those with non-traditional office space, such as High Falls. This suggests that the issue is not one of demand as much as it is of product.

There are no large office developments planned inside the City or in the suburbs. Renaissance Square is one project in the pipeline that will impact the office market. Though it is not an office project, it is causing momentum in the real estate market in the CBD and also taking additional space from the for-rent inventory.

Employment Trends and Office Demand

Rochester had long been a “big 3” company town—with a significant portion of area residents working for Kodak, Bausch & Lomb, and Xerox. While these companies still have a presence in the community and a role in its employment, the complexion of the employment environment has changed as industries and the economy nationwide has changed. Now, these three companies employ only about 10 percent of all area employees. The downsizing in these industries has not impacted the area as much as in other areas in the northeastern United States. Key factors in Rochester are that the downsized employees from these companies had transferable skills and there is a strong educated workforce as well as new students emerging from well-regarded educational institutions within the city. As a result, there is a recognized set of start-up tech companies in several sectors, including imaging, telecommunications, information technology, biosciences, nanotechnology, and study of fuel cells. These developments have gained national recognition from rankings in innovation, technology, and patent issuance. Rochester was ranked number one out of the 50 largest metro areas for technical innovation, with 2.3 patents per 1,000 workers and 6.6 percent of those employed in manufacturing being employed in “high tech” industries.

The future of Rochester employment has a direct impact on the office space demand. The type of office space that will be needed by industries that will be strong in the future is also a consideration. Start-up high tech firms need smaller spaces with specifications designed for their industry; as these firms expand, they need additional capacities. Often, though, high tech industries have needs for space that extends beyond office space to flex space or industrial space.

Office-using employment is projected to grow gradually in the next 5 years. In 2005, Monroe County had 72,000 employees working in office-using industries. These industries include information, professional services, management, financial services, insurance, real estate, organizations, and government. In the next five years, approximately 2,500 employees are expected to be added to these

industries. Based on average office space per employee, there would be a need of 507,000 square feet to meet this demand.

Demand for New Office Space at the Port of Rochester Site

There is not much traditional competitive office space in the immediate area around the study site with the exception of service offices serving the local residents (lawyers, doctors, real estate agents, etc). The area is unlikely to become a large draw for new competitive office space because of the distance from both downtown and the preferred suburban space. The site would be ideal for smaller companies and non-traditional office tenants looking for unique or impressive space—the lake and proximity to boating amenities is the main draw here.

**Potential Office Space Based Upon Projected Office-
Using Employment Growth
Port of Rochester**

	2005	2010
Employment	72,910	75,477
Office SF	14,400,000	14,906,997
Net New Employees		2,567
Net New Office Space		506,997
Port of Rochester Capture	51,000	- 76,000

Source: Economy.com, ZHA, Inc.

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Because of the unique location of the Port, it is expected that it could capture between 10-15 percent of total demand or 51,000 to 76,000 square feet. It is necessary that this office space could be at a key location on the water, and the most probable candidate is a retrofit of the Ferry Terminal Building, especially for the space to keep in line with competitive rental rates.

RETAIL MARKET ANALYSIS

Types of Retail

The main types of retail found in shopping centers, or what ZHA refers to as shopping center-oriented retail falls into the following categories:

- GAFO—standing for General Merchandise, Apparel, Furniture, and Other.
- Convenience
- Home Improvement

Though restaurants, bars, cafes and the like are not technically classified as “retail,” they are often located in shopping centers and downtowns and are therefore treated as a retail category in the analysis and projections.

Following is a brief description of each category.

GAFO

GAFO stands for General Merchandise, Apparel, Furniture, and Other. This category of retail includes general merchandise stores like Target and Wal-Mart, fashion boutiques, bookstores, antique shops, electronics stores, and many of the kinds of stores you find in a regional mall. GAFO is where customers do the most “comparison shopping.” GAFO stores tend to cluster at regional shopping centers where they have access to the greatest number of shoppers—a cluster of these kinds of stores creates a shopping destination for customers. General merchandise stores include department stores and dollar stores—stores that sell a wide assortment of goods. The “other” category includes stores selling books, cards, stationery, gifts, art, electronics, and other types of merchandise not in the other three categories

Convenience

The convenience category includes supermarkets, drugstores and convenience stores, as well as specialty food stores and liquor stores. These types of establishments are highly dependent upon a “captive” market. In other words, people will not travel a far distance for their daily needs. This category of retail, then, is largely dependent on local residents and a daytime population to support it. Convenience stores look for areas of high growth when locating and typically have a smaller trade area than shoppers goods stores and eating and drinking establishments.

Home Improvement

Home improvement stores include hardware stores, home improvement superstores, carpeting stores, renovation showrooms, paint stores, etc.

Eating and Drinking

Eating and drinking contains establishments such as restaurants, bars, and cafes. These kinds of uses tend to cluster, and similar to GAFO establishments, have a “destination” effect. Restaurants often can appear to defy traditional demand considerations, because customers will travel outside of their trade areas to eat at a particular restaurant. Additional restaurants appear to “create” demand by bringing additional customers into an area.

Retail District and Shopping Center Types

Beyond classifying individual store types, groups of retail is also classified, often based on its size and its locational characteristics. Shopping centers are classified based upon a relatively widely accepted set of criteria set forth by the International Council on Shopping Centers.

Regional Shopping Centers

“Regional” retail is used to describe both the regional shopping centers, as well as the cluster they form with other associated shopping centers. According to the International Council on Shopping Centers, regional shopping centers contain between 400,000 and 800,000 square feet of shopping space, mostly dedicated to full-line department stores, fashion apparel stores, and other GAFO (General Merchandise, Apparel, Furniture, and Other retailers) stores. The tenants in these regional shopping centers are usually full-credit tenants, and nationally known names. Their stores offer breadth and depth of merchandise.

A regional shopping center’s primary trade area—or where it gets between 60 to 80 percent of its sales—typically covers 5 to 15 miles. Superregional shopping centers are larger than regional ones, including over 800,000 square feet of space. They usually have three or more anchors and a greater variety of additional retailers. The trade area can span to 25 miles depending upon the competitive market. More recently, both of these types of centers have been appearing in open-air as well as enclosed formats, but most typically, they are still in the traditional enclosed mall format.

Regional shopping centers typically share the following location characteristics. Regional retail chooses to locate on sites that are highly accessible, highly visible, and that match their corporate plans to penetrate a market. Retailers that locate in regional shopping centers—and the national chain, big box and accompanying retailers that locate near these centers—look for sites that are within an easy reach of major highways, especially if they are first entering a market. Areas along highways and other heavily traveled routes with large traffic counts give the retailers greater visibility to passing customers and easy access for customers traveling

there to shop. Perhaps even more importantly, it gives them access to their distribution network, which is crucial in most retailers' pricing strategy.

When locating in a market, regional shopping center retailers often "surround and attack." If they add one store, they may choose a site in the middle of the market so that it is accessible to customers from all sides. If they add two, they will put one on either side of the market. Most typically, stores have strategies set in place several years out and plans for how and where they will enter the retail "battlefield."

Community Shopping Centers

Community shopping centers serve a smaller population than do regional shopping centers. These can contain supermarkets and other convenience-focused retailers serving the community, or be "power centers" with big and small-box retailers such as Best Buy, Home Depot, and Staples. They contain between 100,000-350,000 square feet of retail space, and their trade areas typically extend 3-6 miles.

Neighborhood Shopping Center

Neighborhood shopping centers serve an even smaller population than community shopping centers, as their name implies. They usually have a supermarket or drug store as their anchor store, and are between 30,000-150,000 square feet in size. Their trade areas extend approximately three miles. These centers act as convenience centers for immediately surrounding residents.

Existing Supply

In analyzing the competitive supply in Rochester for the Port Site, ZHA gathered data on the supply in the following types of retail clusters:

- Regional Retail Locations—Contain a regional shopping center, community centers, and draw from a large trade area
- Specialty Retail— In this case, the retail and cultural offerings are one-of-a-kind creating a destination worthy of longer drive times. To be successful, a critical mass of a variety of entertainment, retail, and cultural land uses must be offered to generate activity throughout the day and evening.
- Nearby Convenience—community centers or neighborhood centers within the trade area of the Port site.

Regional

Regional retail centers contain an agglomeration of shoppers goods stores to offer depth and breadth of merchandise. The depth and breadth of merchandise allows these types of retail centers to draw from a geographically larger trade area. These types of centers tend to be highly formulaic in their tenant mix and location

criteria. ZHA identified the principal close-in regional retail clusters as (in order of approximate drive time from the subject site):

- Greece
- Irondequoit
- Henrietta
- Webster
- Victor

The map below illustrates the location of these concentrations. The faint green under the road map shows the income concentration in the map on page 7. The development of regional retail occurs where it can access the greatest number of customers with the most money. Accessibility to the road system and to the households with the largest incomes, then, is paramount.



Below is a brief description of each regional center's attributes.

Greece

Along the western portion of Ridge Avenue, the Mall at Greece Ridge Center seems to have combined its traditional indoor mall with an indoor power center, amounting to a total of 1,630,000 square feet. Its tenants include anchors Kaufmann's (115,000 square feet), Sears (123,000 square feet), JC Penney

(165,000 square feet), Burlington Coat Factory (75,000 square feet), Target (123,000 square feet), and The Bon Ton (150,000 square feet). It also has a Circuit City, Dick's Sporting Goods, Michaels, Marshalls, and Barnes and Noble. Popular Swedish retailer H&M also has a store at this mall. The majority of the Mall at Greece's stores are popular selections with a lower price point than in Victor (see below), such as Eddie Bauer, Lerner New York, and Old Navy. Several community shopping centers—including a Wegmans, Staples, and Home Depot—along Ridge Avenue complete the retail mix. This is probably the regional mall the majority of residents within the ferry terminal's trade area shop. More recent developments have been a Kohls further West from the Mall at Greece Ridge. There is slated to be additional retail development at this site, called the "Shops at Hampton Ridge," including approximately an additional 65,000 square feet of retail and 20,000 square feet of office. The Mall at Greece Ridge Center is approximately 8.5 miles from the ferry terminal site. The overall shopping center retail space in this area is nearly 3-million square feet.

Irondequoit

On the eastern end of Ridge Avenue, the Medley Centre, once Irondequoit Mall, which had been struggling for many years, lost its final anchor tenants (Kaufmann's, Sears, and the Bon Ton). The 774,281 square foot mall was built in 1990 for \$80 million. It was recently purchased by a new owner who has aggressively started to lease the mall, and has secured several new tenants for the mall, including a Steve & Barry's clothing store. However, the majority of the mall remains vacant. Ground was recently broken on a new 127,000 square foot Target, slated to be open by fall 2006. The surrounding retail along Ridge Avenue is surviving, but appears to appeal to a lower-income city resident. Among the retailers are Wal-mart and K-mart. Overall, this corridor has approximately 2-million square feet of shopping center space, though nearly half of that is vacant (the mall). This is the second closest regional retail node to the ferry terminal site. It takes approximately 15 minutes to drive the 5 miles from the ferry terminal site to this area.



The new sign for the Medley Centre. Photo: ZHA, Inc.

Henrietta (SW of Center)

Henrietta is the location of Marketplace Mall (1,100,000 square feet) and its accompanying power centers. The mall has as its anchors a Kaufmann's (149,000 square feet), JC Penney (138,000 square feet), Sears (137,000), a Bon-Ton (96,000 square feet) and a Galyan's Trading Company (84,000 square feet). It also has many popular mall stores, such as Banana Republic, Body Shop, Lands End, and Abercrombie and Fitch. This retail node is an easy drive from downtown Rochester and surrounding suburbs. It has a full assortment of mall stores. This section of the suburban area also has a large total amount of shopping center space—over 4-million square feet. It is approximately 18 miles from the ferry terminal site.

Victor (SE of Center in Ontario Co.)

Just beyond Pittsford/Fairport/Bushnell's basin area, Victor has the Eastview Mall, which recently expanded in 2003, making it the largest mall in the area. This mall has several stores unique to the Rochester area, including several "lifestyle" retailers. These stores include Coldwater Creek, J. Jill, Williams-Sonoma Grand Cuisine, Pottery Barn, Williams-Sonoma, Godiva Chocolatier, J. Crew, and Arhaus furniture. The accompaniment of several large power centers with a Target, Home

Depot, and others, makes this a large retail node within one of the wealthier pockets of the metropolitan area. Overall, the area has more than 2 million square feet of shopping center space. This regional shopping area is the furthest from the ferry terminal site, approximately 25 miles.

Other retail growth happening in the Rochester area includes the new Webster Town Centre development in Webster. This center includes over 800,000 square feet of retail, mostly in big box stores such as Target, Dick's Sporting Goods, Kohl's, Bed, Bath, and Beyond, and Barnes and Noble. An additional 40,000 square feet are slated to be added in 2006.

Because of the Port area's hindered access and visibility to large numbers of customers, it is unlikely to become a regional shopping destination. Instead, it will be competing with other "specialty" retail centers within Rochester.

Specialty Centers

Another kind of retail which is complementary to regional retail, but has separate characteristics, is specialty retail. Specialty retailers similarly draw from a large trade area, like regional retail, but often are found in traditional downtowns. These areas have entertainment appeal, and often feature independent and local retailers, especially in the other category of GAFO, selling books, music, stationery, jewelry, and other miscellaneous goods. Specialty retail also includes a large percentage of eating and drinking. These centers often bud from neighborhood retail centers and can have some convenience retail, but this is not their primary focus or the force of their support.

The City of Rochester has several retail and entertainment enclaves. While there are also several in the suburbs (for example, Main Street in Pittsford and Fairport), but this analysis will focus on several of the neighborhoods in the City itself. The four areas ZHA, Inc. considers the most significant are:

- **Park Avenue/Monroe Avenue:**
Park Avenue/Monroe Avenue is considered one of the "hip" shopping and dining area of Rochester. ZHA estimates that there are between 700,000 and 800,000 square feet of shopping center-type retail (i.e. non-automotive-related retail) and services in the Park Avenue/Monroe Avenue area. The greatest amount of space in this neighborhood is devoted to eating and drinking establishments.
- **Downtown (Center City, St. Paul, East End)**
Though downtown Rochester has lost share in office space when compared to suburban submarket, it still retains a rather large concentration of the area's office space, and thus, office workers. Approximately 30,000 office-oriented

workers are downtown. The emerging restaurant/nightlife districts of St. Paul and East End benefit from this captive retail market, as well as from the recent resurgence in loft apartments in these areas.

- **High Falls**
High Falls is a major tourist destination near downtown. The falls provide a stunning backdrop for entertainment uses in the ex-industrial buildings. This neighborhood's proximity to Frontier Field and an office of Eastman Kodak also makes it the ideal location for pre- or post-game dinners/drinks or happy hours. The area also benefits from its proximity to downtown.

Most likely because of the weakness in the near residential market (and its smaller overall geographic area), High Falls has significantly less retail supply than the other neighborhood shopping areas. ZHA estimates that there are between 60,000 and 70,000 square feet of retail space in the High Falls area. The retail located in High Falls is primarily eating and drinking, constituting 96 percent of overall space. There are several well-respected restaurants, a few cafes, and limited number of gift shops. The large "eater-tainment" facility Jillians recently closed, with another tenant or user yet to be found.

- **Charlotte**
Charlotte is the neighborhood on either side of Lake Avenue and is adjacent to the ferry terminal site. While its retail mix follows a similar pattern to the neighborhoods in the southeast portion of the city, it has less population density. Within one mile of the ferry terminal, there are 7,573. The per capita income for the one-mile radius is \$24,016. ZHA estimates that there are 150,000 to 200,000 square feet of retail space in Charlotte. Charlotte follows the same trend as many of its city counterparts: eating and drinking establishments constitute about 50 percent of all retail space in this neighborhood. The majority of restaurants in Charlotte are bar/grills or take-out food establishments.



While within Charlotte there are few grocery/drug stores, immediately outside of its boundaries, there are two fairly large clusters of convenience goods within one-to-two miles of the site—in the Stutson shopping center (supermarket, drug store), and on Dewey Avenue (Wegman’s Supermarket, Eckerd, Rite Aid, and others).



From ZHA’s analysis of neighborhood retail in Rochester, it is clear that neighborhoods are most successful in eating and drinking. This is both

because of their capacity to integrate these businesses and because of the consumer’s tendency to travel for restaurants.

Rochester Neighborhood Shopping Center Oriented Retail Square Feet, Type as % of Whole 2005

Retail Neighborhood	Square Ft	Type
Charlotte	143,000	
Downtown (incl. East End)	703,000	
High Falls	25,000	
Monroe/Park Ave	670,000	
Total	1,541,000	

Source: ZHA, Inc.

Retail Demand

Retail demand will come from existing residents, new residents on the Port Site, new workers, and visitors. The Monroe County Parks Department estimates that the Ontario Beach Park currently receives between 275,000 and 300,000 visitors each year. The beach is likely to receive most of its visitors during the warmer months of the year.

Based upon projected growth, the visitors annually to Ontario Beach Park, and expenditures of new office workers, the Port area is likely to be able to support approximately 70,000 square feet of new retail space. Approximately half of this space is projected to be eating and drinking establishments, the remainder is essentially split between convenience goods and shopper’s goods.

HOTEL MARKET ANALYSIS

Hotel investments are typically more difficult real estate transactions to attract, especially in recent years, when a glut of product, a reduction in rates of travel after 9-11, and a change in the types of products demanded by the marketplace, contributed to reduced profits.

One of the primary challenges for Rochester in general in the hotel and tourism industry is that the City is not typically a leisure travel destination and its tourism cycle is very seasonal, dropping in the colder winter months. Rochester's strength in visitor numbers is largely dependent on business travel. These conclusions are confirmed by the visitor numbers provided by the Greater Rochester Visitors Association.

Visitor Numbers 1999-2004 Monroe County, NY									
	1999	2000	2001	2002	2003	2004	Change 1999- 2004	Average Annual Change	Average Annual % Change
Corporate/Transient	730,000	710,000	635,000	660,000	690,000	720,000	(10,000)	(2,000)	-0.3%
Convention/Meeting/Event	560,000	565,000	510,000	545,000	575,000	605,000	45,000	9000	1.6%
Leisure	270,000	285,000	265,000	270,000	285,000	300,000	30,000	6000	2.2%

Source: Greater Rochester Visitors Association, ZHA, Inc.
F:\50030 Port of Rochester\VisitorsInfo.xls\VisitorsOverTime

The most recent numbers made available (2004) show that corporate visitation has struggled to regain the levels seen in 1999, though since 2001, the number of visitors traveling for business has steadily increased. The same can be said for both conventions and leisure travelers. The number of visitors coming to Rochester for leisure travel in 2004 was the largest amount in the 5 year period, reaching a total of 300,000 visitors in a category that had normally been seeing 270,000-285,000 annually. Still, the leisure category of visitors is relatively small. This is crucial because leisure visitors are the most likely to spend their money around the region and to visit areas not immediately proximate to their conference/corporate destinations. The business traveler and conference-goer are not to be completely overlooked, but they are more likely to spend money in the immediate vicinity of their destination, which would have less impact on the Port site, due to its distance from downtown.

**Spending Per Visitor
Monroe County, NY**

Year	Total Visitors	Visitor Spending	Spending/Vi sitor
1999	1,560,000	\$238,000,000	\$152.56
2000	1,560,000	\$241,000,000	\$154.49
2001	1,410,000	\$226,000,000	\$160.28
2002	1,475,000	\$231,000,000	\$156.61
2003	1,550,000	\$246,000,000	\$158.71
2004	1,627,000	\$254,000,000	\$156.12

Source: Greater Rochester Visitors Association, ZHA, Inc.

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Spending per visitor has fluctuated in the period from 1999-2004. Though the per visitor expenditure in 2004 of \$156.12 was almost \$4 per visitor more than in 1999, it does not reach the high of \$160.28 per visitor reached in 2001. The stronger this number is, the better for auxiliary businesses, such as retailers and restaurants away from the conference/corporate destinations. The following table shows the breakdown of a typical per-visit expenditure.

**2004 Visitor Expenditures by Category
Monroe County, NY**

	Total	Percent	Per Visitor Expenditures
2004 Total Visitors	1,625,000		
2004 Total Visitor Expenditures	\$254,000,000		
Lodging	\$113,000,000	44.5%	\$69.54
Food/Beverage/Entertainment	\$82,500,000	32.5%	\$50.77
Transportation/Retail	\$58,500,000	23.0%	\$36.00

Source: Greater Rochester Visitors Association, ZHA, Inc.

F:\50030 Port of Rochester\VisitorsInfo.xls\ExpenditureDistribution

Almost half of all visitor expenditures is spent on lodging. The remaining is spent between eating out, entertainment, transportation, and retail. From those expenditures, a small amount could probably expect to be spent away from the hotel, conference center, or area surrounding the offices.

Hotel Supply and Existing Conditions

ZHA pulled historic hotel supply, rate, and occupancy data for five of Rochester's top-rated hotels, including Clarion Rochester Riverside, Marriott Rochester Airport, Crowne Plaza Rochester, Hyatt Regency Rochester, and Renaissance Pittsford Del Monte Lodge. Choosing these hotels provides a hypothetical snapshot to illustrate what a new hotel might be able to bring in revenues by attempting to weed out the older or under-performing properties. Three of the properties are in prime downtown locations, one is near the airport, and the other, the Renaissance Pittsford, is in a prosperous suburb and holds the highest rating of all five.

**Rochester Full-Service Hotels Included in the Statistics
2005**

Property Name	Address	Rooms	Open/ Renov. Date	Advertised Standard Rates	Notes
Clarion Rochester Riverside	120 Main St E, Downtown Rochester	465	1970/ 2004	\$109 - \$169	14-story hotel directly connected to Riverside Convention Center, overlooking the Genesee River. 14 meeting rooms available with a total meeting capacity of 2200. Total Meeting Room Space: 30000; Total Exhibit Space: 23000
Marriott Rochester Airport	1890 W Ridge Rd	210	1979/ 1998	\$159 - \$179	6 meeting rooms available with a total meeting capacity of 400, Total Meeting Room Space: 4800; Total Exhibit Space: 4000
Crowne Plaza Rochester	70 State St, Downtown Rochester	362	1969/ 1997	\$139 - \$239	Downtown Seven-story Hotel situated along the scenic Riverwalk in the business district. 14 meeting rooms available with a total meeting capacity of 2222. Total Meeting Room Space:
Hyatt Regency Rochester	125 East Main St, Downtown Rochester	336	1992/ 2005	\$129 - \$239	Twenty-five-story Downtown Hotel connected via enclosed walkway to Rochester Riverside Convention Center & Midtown shopping plaza. 17 meeting rooms available with a total meeting capacity of 1000. Total Meeting Room Space: 13500; Total Exhibit Space: 3600
Renaissance Pittsford Del Monte Lodge	41 N Main St, Pittsford	99	1972/ 2000/ 2005	\$179 - \$209	2 meeting rooms available with a total meeting capacity of 140, Total Meeting Room Space: 2025, Total Exhibit Space: 2025

Smith Travel Research is a firm that provides hotel data, and is often used by those in the industry to make decisions. The numbers provided by Smith Travel Research show that Rochester's hotels have been steadily improving their occupancy and income figures. There has not been brand new supply in Rochester in the highest rated categories in at least the last 10 years. Renaissance Pittsford which was closed, remodeled, and reopened opened in 2000, adding 99 rooms to the supply.

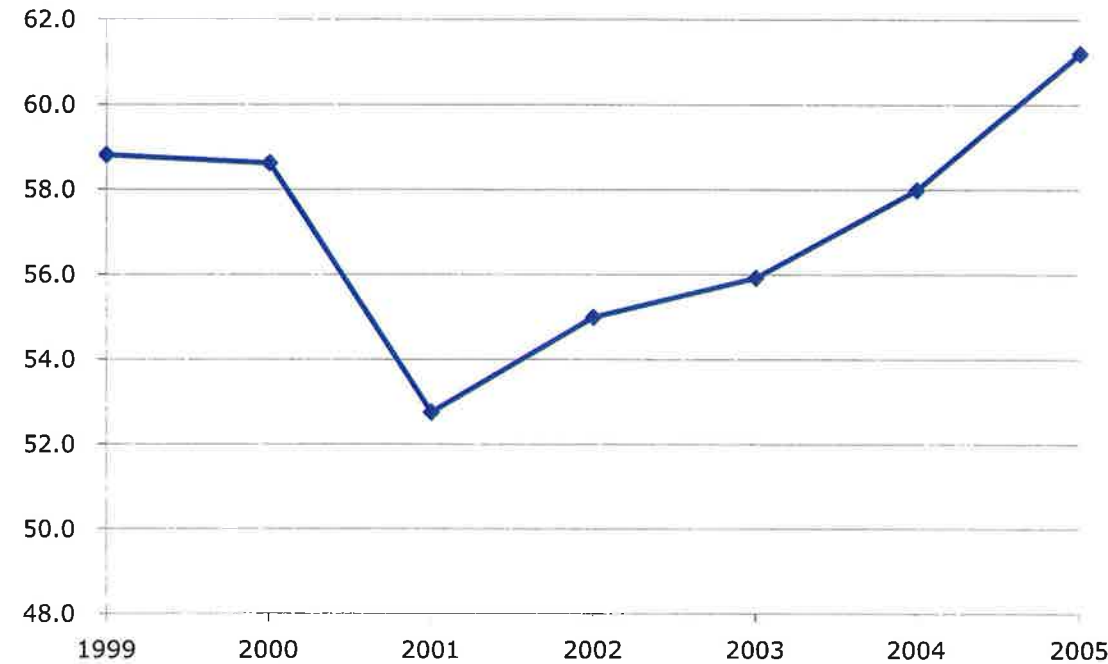
**Rochester Historical Room Supply and Demand Trends
Selected Hotels Data (November YTD)
1999-2005**

	# of Rooms	Supply (YTD)	% Change	Demand (YTD)	% Change	Occupancy Rates	ADR	RevPar
1999	1,373	458,582		269,659		58.8%	83.60	49.16
2000	1,472	482,738	5.3%	282,955	4.9%	58.6%	84.89	49.76
2001	1,472	491,648	1.8%	259,297	-8.4%	52.7%	86.90	45.83
2002	1,472	491,648	0.0%	270,304	4.2%	55.0%	85.69	47.11
2003	1,472	491,648	0.0%	274,884	1.7%	55.9%	89.84	50.23
2004	1,472	491,648	0.0%	285,067	3.7%	58.0%	88.58	51.36
2005	1,472	491,648	0.0%	300,868	5.5%	61.2%	89.61	54.84

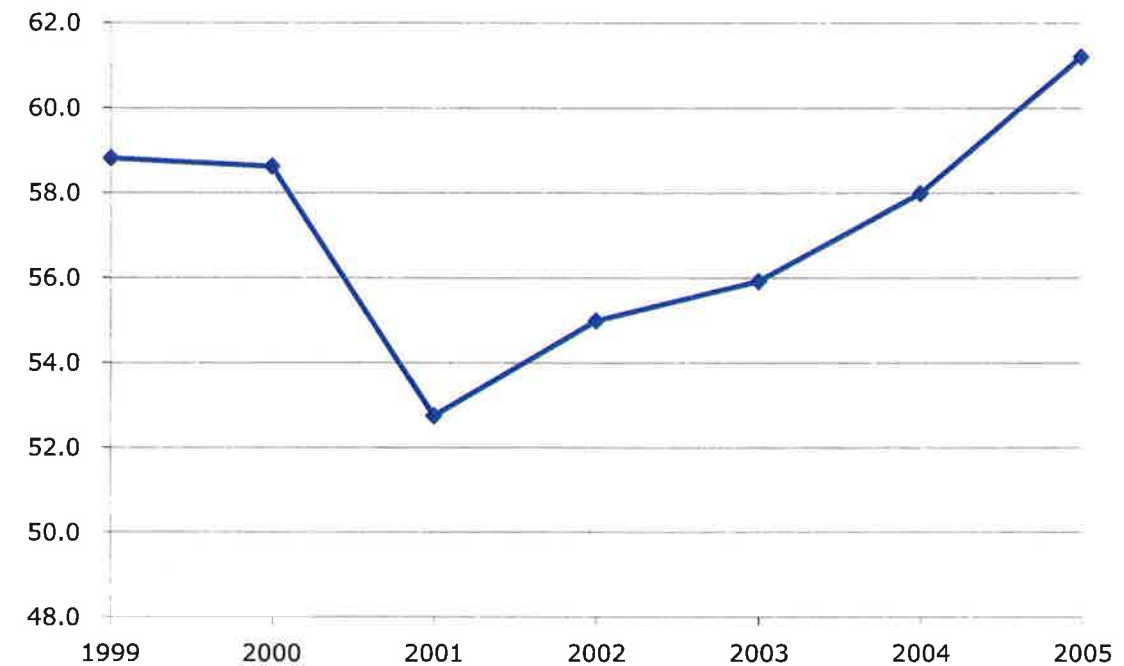
Source: Smith Travel Research
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The average occupancy for the entire year of 2005 (year to date) was 61 percent. While this represents an increase over previous years, it is still well below the 65-70 percent that financiers expect to see in a hotel deal. Typically, occupancies peak in the summer and decline in the winter. Hotel revenue per available room is also low at \$54.84. While this is still below performance standards, it represents a 6.8 percent increase over the previous year. The average room rates for the top of the line hotels was \$89.61 for the first eleven months of 2005.

Hotel Occupancy Rates 1999-2005 (YTD as of November)



Hotel Occupancy Rates 1999-2005 (YTD as of November)



Given positive hotel trends, it may be worthwhile to plan for a limited service hotel at the Port of Rochester or a small boutique inn. These products will likely not be developed in the next five years, but could be an important component of a long term plan for the area.

OTHER USES

Waterparks

The most rapidly-expanding chain, Great Wolf, draws families with kids between the ages of 2-14 who live within 180 miles, or a 3-hour drive. The company looks for visible sites to put its approximately 50,000-80,000 square foot parks with adjoining 200-300 room hotels. Construction time is between 12-18 months, depending on the size of the facility, but development time can last 2-4 years. The water parks typically operate under a "guest only" policy, with the exception of one park in Sheboygan, WI. Additional amenities in the park/hotel include on-site spa facilities, restaurants, and other activities. The company has recently introduced condos into several of its resorts.

The company is currently evaluating 12-14 new sites, but has recently built one with licensee Ripley Entertainment at Niagara Falls in Canada. According to the director of development at Great Wolf, the close proximity of Niagara Falls, one of

the chain's larger facilities, precludes Rochester from this company's development plans in the near future.

WATERFRONT DEVELOPMENT CONCEPTS

Positioning of whatever development takes place on at the Port of Rochester will be crucial to its success. Having a "vision" for what the area can be, and working to create that vision is of utmost importance.

Two potential market niches for the Port to pursue are a "waterfront entertainment district," and a "luxury marina community." Each concept has a different target market. The waterfront entertainment district would be a mixed-use center that features nightlife and higher-end restaurant/bar uses on the waterfront which would make the location enough of an attraction to draw customers from throughout the City and region. The "edgier" nature of the development, along with a more moderate price point, would make this development more targeted toward the younger professional singles or couples households. The associated multifamily housing options would build on the popularity of the location.

The second option, the "luxury marina community" concept, would be a more relaxed, high-end option, for seasoned boaters, with housing built for their lifestyle and the amenities to cater to them. While there would be some retail and services available to the general public, the main focus and drive of the location is for the residents. The likely target market for this kind of development would be empty nesters and retirees, with some younger professionals who are looking for a similar lifestyle.

MARINA MARKET ASSESSMENT

Rochester's position on Lake Ontario and nestled north of the Finger Lakes places it firmly in the hub of one of two boating centers in New York, which is in itself one of the more powerful markets in boating in the United States. Slips in the Rochester Metro Area account for one-quarter of the slips on the New York side of Lake Ontario. And, in 2004, New York State was 7th in the nation in numbers of recreational boats registered. Boat ownership does fluctuate with the general economy, and as such, registrations have declined somewhat in the last five years. However, longer term trends have seen overall increases in boat registrations and the percent change in registrations in New York state between 1996-2004 was twice that of the increase in boat registrations in the U.S. as a whole. The number of Americans participating in boating activities has increased in the last five years, according to the 2005 National Forest Service's *National Survey on Recreation and the Environment*. The survey reported that between 1994/95 and 2000/01, the

number of people participating in motorboating increased 6.34 million, while sailing had an additional 1.46 million participants. Those participating in the related activity of coldwater fishing increased 8.54 million. The 2000 survey found that 1.4 million residents of New York participated in boating activities, making it 4th in the nation.

New York State Boat Registration Trends 1996-2004					
Year	Total	Change	US	Change	NY % of US
1996	458,092		12,056,975		3.8%
1997	512,430	11.9%	12,309,724	2.1%	4.2%
1998	514,749	0.5%	12,565,981	2.1%	4.1%
1999	524,326	1.9%	12,735,612	1.3%	4.1%
2000	525,436	0.2%	12,782,143	0.4%	4.1%
2001	526,190	0.1%	12,876,346	0.7%	4.1%
2002	529,732	0.7%	12,854,054	-0.2%	4.1%
2003	528,094	-0.3%	12,794,616	-0.5%	4.1%
2004	519,066	-1.7%	12,781,476	-0.1%	4.1%
Change 1996-2004	60,974	13.3%	724,501	6.0%	

New York State Ranking in 2004: 7

Source: 2004 U.S. Recreational Boat Registration Statistics, National Marine Manufacturers Association

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Monroe County had a total of 30,374 boats registered in 2005, giving it a 6.1 percent share in the State's registrations and making it third in the number of registrations behind the Long Island counties of Suffolk and Nassau.

2005 Top New York Counties in Recreational Boat Registrations

	2005
Suffolk	78,470
Nassau	37,148
Monroe	30,374
Erie	26,962
Onondaga	23,785

Source: New York State Office of Parks, Recreation, and Historic Preservation, ZHA, Inc.

Beyond Monroe County alone, the Rochester metro area (Monroe, Livingston, Ontario, Orleans and Wayne counties), comprises just over 10 percent of total New York state boat registrations, and this number has increased over the past 15 years.

Rochester Metro Area Change in Boat Registrations 1990-2005

	1990	2005	Change 1990-2005	% Change 1990-2005
Livingston	2,814	4,000	1,186	42.1%
Monroe	27,278	30,374	3,096	11.3%
Ontario	5,582	7,775	2,193	39.3%
Orleans	1,670	2,291	621	37.2%
Wayne	5,415	7,142	1,727	31.9%
Metro Total	42,759	51,582	8,823	20.6%

Source: New York State Office of Parks, Recreation, and Historic Preservation, ZHA, Inc.
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The majority of boats registered in Monroe County and the Rochester metro area in 2004 were between 16'-25' (51.9 percent and 52.76 percent respectively). This category of boat holds a slight majority over the under 16' category, which had around 41 percent in both geographic areas.

2005 Boat Registrations by Type Rochester Metro Area

Class	Size	Rochester Metro	Type % of Total	Metro % of S	State	State Type % of Total
Uncoded		133	0.26%	9.0%	1,477	0.3%
Class A	<16'	21,059	40.83%	10.6%	198,969	39.1%
Class 1	16'-25'	27,484	53.28%	10.5%	261,912	51.5%
Class 2	26'-39'	2,727	5.29%	6.2%	43,905	8.6%
Class 3	40'-65'	168	0.33%	4.6%	3,661	0.7%
Class 4	>65'	11	0.02%	4.2%	261	0.1%
Total		51,582	100.0%	10.1%	508,708	100.0%

Source: New York State Office of Parks, Recreation & Historic Preservation, ZHA, Inc.
 F:\50030 Port of Rochester\BoatRegistration History.xls]BoatRegMetro

Monroe County and the Rochester metro has a lower percentage of boats in the 26'-39' range than the state as a whole. This is confirmed in a study conducted by the New York Sea Grant on recreational boating expenditures and their impacts which found that 64.7 percent of upstate respondents to their survey stated that the length of boat used most often was between 16-25', as compared to 61.3 percent of downstate respondents. Also, in this same study, 26.1 percent of respondents used a boat 16' or under, as compared to 10 percent of the downstate respondents. The share of total boats in the metro area in the 16'-25' range increased by 1.6 percent between 2000-2005, whereas the share in the smaller category of boats under 16' decreased slightly. There were negligible increases in the share of boats sized 25'-65' during this period, and a negligible decrease in boats 65'+. Overall registrations decreased in the metro area during this period.

This impacts how boat owners use and store their boats. In this same study, more boat owners upstate were likely to trailer their boats and perhaps not use the services of a marina on a regular basis, whereas those downstate with larger boats more frequently required a marina's services.

According to information published by the New York Sea Grant, on the New York side of Lake Ontario, there are a total of almost 8,000 boat slips in 135 marina facilities. These facilities offer approximately 800 spaces for transient boaters. Of the total 8,000 boat slips, 2,200 of these are in the Rochester area.

A report for the International Lake Ontario-St. Lawrence River Study comments that boaters tend to be "empty nesters" (68 percent in the U.S.) with a mean age of 55 with above average incomes (\$65,000 for New York boaters, as compared to a median household income of \$45,000 statewide). The "empty nester" demographic will be a growing one in the coming decades as baby boomers age.

Though this study found that boats are getting larger and more powerful, and though several of the marinas surveyed said that their larger slips were the first to be reserved, as evidenced by the data gathered by the New York Sea Grant and by the boat registration information, the market for larger boats remains a tighter one, and a less powerful one in the Great Lakes area versus the coastal region of Long Island. The market for larger boats will likely grow in coming years, but the mid-sized boat is likely to be the greatest market for the near term.

In Rochester itself, around Lake Ontario, there are numerous marinas, and informal surveys of owners indicate that the market could possibly support additional slips. There are approximately 2,830 slips in marinas in the Genesee River and Irondequoit Bay. Approximately 900 of these are in the Genesee River. These marinas range from 18 slips to 230. The Genesee River has good depth for sailboats. Prices for slips range from \$55 to \$70 /LF for season (April 15 to November) in River/Bay marinas, and occupancy is very strong—approximately 90 percent.

Of the slips on the New York side of Lake Ontario 10 percent are designated for transients, but closer to the Port of Rochester Site, other than Docksidiers Marina, transient boat slips a small share of total marina slips in Rochester Metro Area.

Other findings of ZHA's survey found that few marinas integrate other compatible uses such as landside shopping, dining, entertainment or housing. Southpoint Marina has preliminarily proposed building condominium units near its marina, but groundbreaking is not expected to happen until March 2008. Mayers Marina is planning an expansion of 300 slips.

Market indicators, such as strong occupancy rates indicate that there is market demand for slips in the area around the Port of Rochester. The Genesee River is an advantageous location for these slips if the depth allows for sailboats. In addition, the development of landside amenities, as planned for the Port site, should support additional transient slips. An additional draw to the site would be the opportunities for empty nesters—who comprise the majority of the boaters—to live near their boat.

Appendix C

Zoning Review and Amendments

DRAFT

The City of Rochester Zoning Code defines a rough building envelope expressed through text and diagrams and permitted uses are listed by district, using simple dimensional limits to restrict density and bulk. There is no reference in the Code to either FAR or specific housing densities (usually expressed in units/acre), and the usual comprehensive use and dimensional tables are notably absent. There are no minimum parking requirements on the site.

Relative to the analysis of this project, the uses in the proposed Master Plan are permitted either as of right or by special permit within the parameters of the Harbor Village (H-V) zoning district that covers most of the site (See Table 1); however, 8.5 acres of the site are included in the Open Space (O-S) district. While the marina uses are permitted in this area, the proposed mixed use buildings and townhouses on the northeastern border of the site would require a zoning change in order to be in conformance with the Zoning Code, (See Table 2). This could be accomplished by either incorporating the O-S portion of the site into the H-V district or by designating a Planned Development District (§120-122), which would replace the existing zoning on the site.

Determining if the proposed plan conforms to dimensional requirements is more difficult than determining allowed uses. The most significant dimensional regulation in the zoning is the minimum 20' setback for residential buildings. Only one portion of the site is bounded by roadway, setbacks from the existing parcel lines would technically impact only the housing along Lake Avenue. If the site was subdivided, and new public roads introduced, the setback would impact the housing along new parcel lines adjacent to new roadways. The proposed master plan shows some townhouses with 10' setbacks from the back of sidewalk. One way to accommodate this would be to designate the project Cluster Development (§120-192), which allows minor changes in dimensional requirements when building clustering creates or preserves open space or preserves historic or scenic resources.

In addition, the H-V district limits uses within 30' of the river and restricts lot and building coverage according to use (see Table 3). While the proposed uses are compliant with use regulations, the coverage calculation is less straightforward: it is dependent on whether the site is considered as a single development parcel or multiple parcels, and how those parcels would be ultimately configured. Parcel configuration could also potentially impact dimensional regulations should the site be designated a Planned Development. There appear to be three strategic options regarding parcel configuration:

- 1) All the parcels could be assembled into a single development parcel and developed by a single developer. In this option, the developer would be responsible for infrastructure planning and construction on the site.
- 2) The parcels could be subdivided into blocks for sequential sale and development. In this option, the City would be responsible for planning and construction of infrastructure.
- 3) The block parcels could be subdivided into individual housing parcels for the townhouses, and larger commercial parcels for the mixed-use development. Since a single developer would likely develop an entire block at once, this would not be substantively different from the previous option; however, this option could be affected differently by dimensional regulations, in particular setbacks. As in option 2, this would require the City to plan and develop infrastructure in advance.

	As of right	> than 30' from river	Special permit > than 30' from river	Special permit
Public Uses	Public paths/boardwalks/trails	Tourist information	Tourist information centers	Boat launches
	Outdoor seating/assembly	Museums and aquariums	Other water dependent activities	Outdoor entertainment
	Boating and fishing docks	Water-dependent activities		Outdoor markets
	Water passenger transportation terminals Boating and sailing schools			Parking areas, lots, garages
Housing		Single family attached dwellings		Single family detached-100' from river
		Live-work spaces		Multi-family
		Mixed use limited to residential/comm		
Commercial	Marinas	Hotels/motels/b&b's	Bar/taverns	Recreation/amusement facilities
	Boat sales, rental and charter facilities	Small restaurants/bars<2500 sf Small private clubs<2500 sf	Restaurants	Vehicle service stations
		Small office spaces<2500 sf	Museums/aquariums	
		Small retail<2500 sf	Private clubs	Retail

use uses in propped master plan

Table 1. Permitted uses in H-V district

	As of right	Special permit
Public Uses	Public parks, squares, recreation Natural wildlife areas Cemetaries and associate facilities Botanical gardens, arboreta, conservatories Boat launches, docks	Active recreation (athletic fields) Band shells, outdoor theaters Golf courses Lighting for nighttime use Parking > 10 spaces Public recreation centers Public schools Public utilities Zoos
Housing	None	None
Commercial	Public marinas	Boat rental Recreation-related concessions/amusement

Table 2. Permitted uses in O-S district

	Small Restaurant/bar, office, retail*	Single family attached	Multifamily (special permit)
River setback	30'	30'	N/a
Max area (as of right)	2500'	N/a	N/a
Max bldg coverage	70%	35%	35%
Max lot coverage	80%	50%	50%
Minimum front setback	0'	20'	20'
Side setback	0'	N/a	N/a
Minimum height	25'	25'	25'

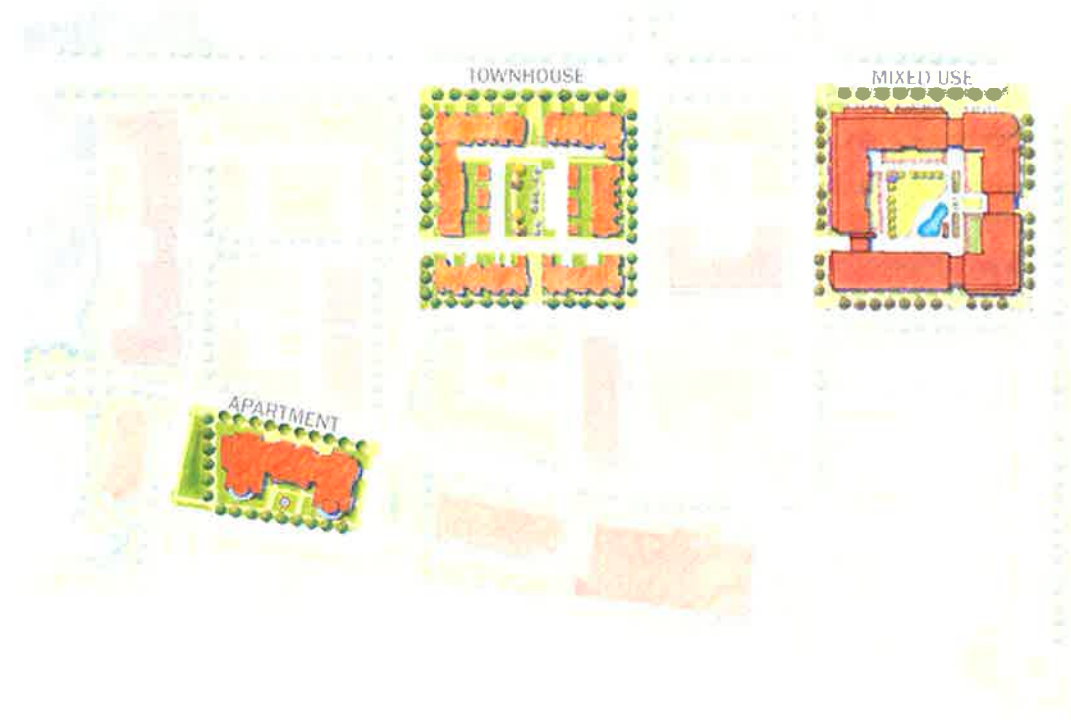
*larger establishments are allowed by special permit

Table 3. Dimensional requirements for H-V district

GENERAL APPROACH:

The concept of the urban design guidelines is one of streets defined by urban blocks of buildings. Within each block, varying amounts of Townhouses, Apartments and Mix-Use / Retail occur. Collectively they will create the Port of Rochester Master Plan – a framework to initiate more specific design that will be unique to this location. The three block types offer a range of compatible mix and densities that help create distinct addresses within the new community. The following text provides recommendations for building siting, building envelope and composition, parking, and special elements.

These general guidelines should help to establish fundamental rules that will help to create a place that is cohesive, yet vibrant and diverse, in its physical character.





TOWNHOUSE BLOCK GUIDELINES

Building Siting, Envelope, and Composition

- Townhouses should be 2-3 stories high. Units fronting primary corridors or public open space should allow for 4 stories
- Townhouses units should front the sidewalk and define the street edge
- The siting of the units should allow for 5'-10' of front yard/stoop zone and a minimum of 5' for side yard zone (corner lot)
- Back yards for Townhouses should range between 15'-40' deep
- Careful variation in siting and massing of the units would help create visual interest
- Entry stops, bays and balconies should be encouraged along the primary façade
- Units should be raised on a 24" to 30" plinth



Parking

- Parking should be at the rear with habitable areas occupying street frontage
- Units should accommodate parking in the form of alley loaded garage/ tuck-under/ pad parking
- Parking should be visually screened with landscape treatment and other elements



Special Elements

- Units with tuck-under parking (no back yard) should consider incorporating a rear-balcony/terrace
- Corner towers in townhouse buildings would create visual interest and provide views to the water



APARTMENT BLOCK GUIDELINES

Building Siting, Envelope, and Composition

- Apartment buildings should be 4-6 stories high
- The siting of the units should allow for 15'-25' of frontyard zone and 10'-20' sideyard zone
- Location and massing of buildings should preserve view corridors to the water
- Primary entryways to all buildings and significant uses should be prominent and clearly visible from the adjacent street or public open spaces
- Upper level of the buildings should stepback to harmonize with the scale of the neighboring townhouse units
- Roof articulation should reflect surrounding rooflines. The tops of buildings should be terminated with a combination of recessed wall planes, cornices, roof forms or material changes
- Building frontages should be articulated with upper floor setbacks, balconies, bay windows, and/or terraces to reduce the apparent mass and to harmonize with the scale of neighboring buildings
- A regular rhythm of windows and bays should be established across building façades
- Massing of apartment buildings should allow maximum sunlight exposure for public open spaces



Parking

- Parking should be at the rear with habitable areas occupying street frontage
- Units should accommodate parking in a combination of surface and decked spaces
- Surface pads as well as access to the decked parking should be located towards the interior of the block and should not interrupt the designated pedestrian environment
- Parking should be visually screened with landscape treatment and other elements



Special Elements

- Buildings along the waterfront should be up to 4 stories tall preserving views to the river and the lake
- Where possible, rear facing units should face onto internal landscape courtyards
- Corner towers in buildings would help break the scale and create visual interest
- Lobby spaces for apartment building should front the sidewalk and be transparent and welcoming





MIX-USE / RETAIL BLOCK GUIDELINES

Building Siting, Envelope, and Composition



- Mix-Use buildings should be 4-6 stories high. Retail floor to ceiling should be 14'-16'
- The retail program should activate the ground floor of mixed-use buildings. The store fronts should be transparent and pedestrian oriented
- Mixed-use buildings should be encouraged to build to the lot line
- Upper level of the buildings should stepback (providing outdoor terraces) to harmonize with the scale of the neighboring townhouse units
- Location and massing of buildings should preserve view corridors to the water
- Primary entryways to all buildings and significant uses should be prominent and clearly visible from the square and street
- A regular rhythm of windows and bays shall be established over building façades
- Roof articulation should reflect surrounding rooflines. The tops of buildings should be terminated with a combination of recessed wall planes, cornices, roof forms or material changes
- Building frontages should be articulated with upper floor setbacks, balconies, bay windows, and/or terraces to reduce the apparent mass and to harmonize with the scale of neighboring buildings
- Massing of apartment buildings should allow maximum sunlight exposure for public open spaces

Parking



- Structured Parking should be lined with active/habitable uses
- Units should accommodate parking in a combination of surface, decked spaces and structured spaces
- Surface parking as well as access to structured parking should be located towards the interior of the block and not interrupt the designated pedestrian environments
- Parking should be visually screened with landscape treatment and other elements
- Parking structures should be designed to the highest standards of sustainability
- Short-term surface and on-street parking should be available close to retail establishments

Special Elements



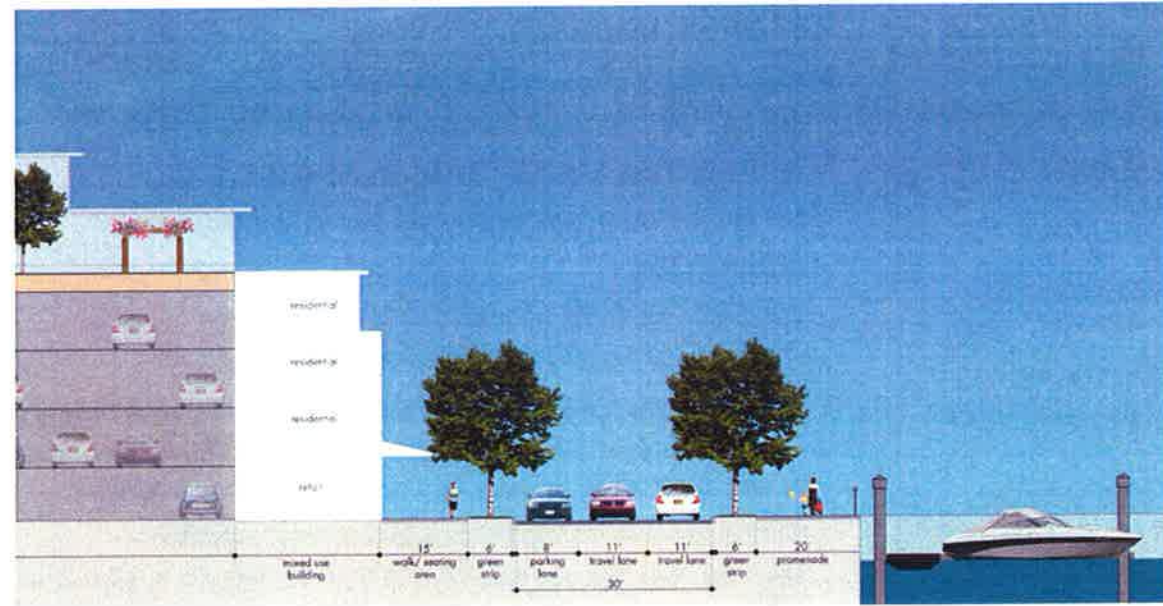
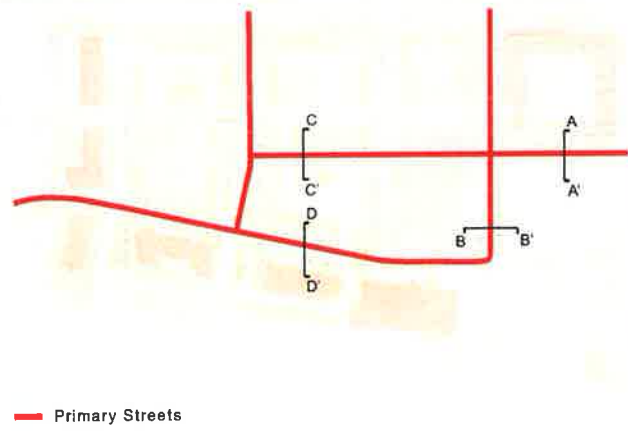
- Buildings along the waterfront should be up to 4 stories tall allowing for views to the river and the lake
- Corner towers in buildings help break the scale and create visual interest
- Awnings or other similar elements are encouraged to reduce the scale of the building at the street level and provide protection from the sun and rain
- Signage, street furniture and other elements should be integrated with the architecture and overall 'theme' of the development

STREETSCAPE GUIDELINES

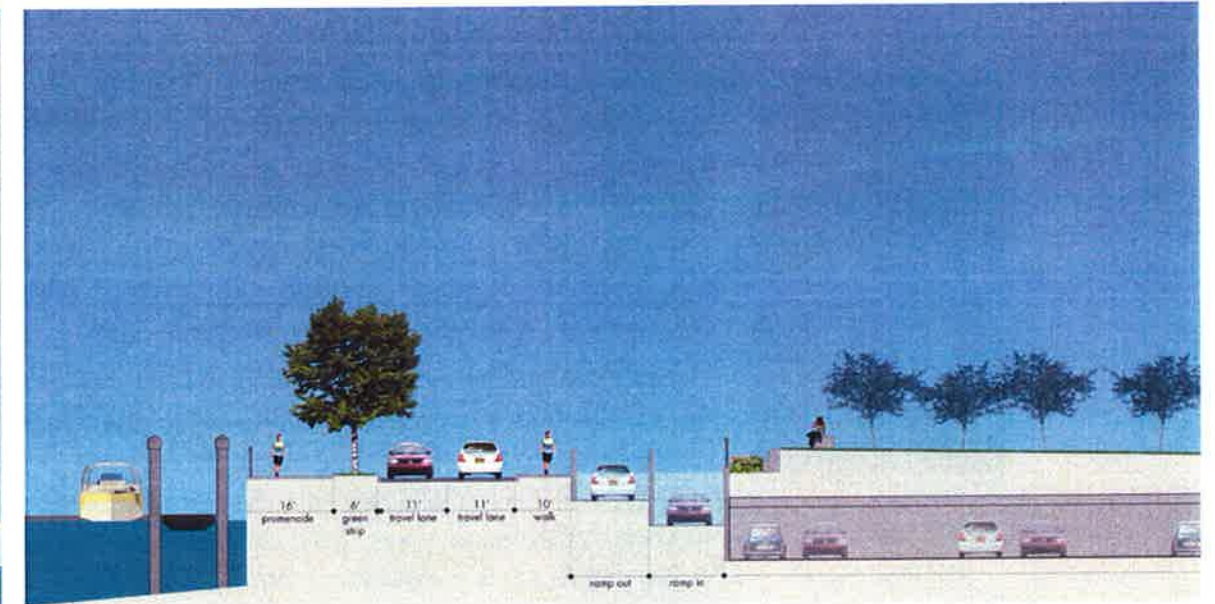
Building Siting, Envelope, and Composition

- 16' - 20' wide pedestrian promenade along the Marina edge
- Pedestrian safety rail along the Marina Promenade edge
- 90° head-in parking spaces only adjacent to retail space
- Granite curbing
- Unit pavers for all sidewalk and promenade surfaces
- 11' wide travel lanes to promote slower traffic flow
- 6' wide planting strip to provide ample shade and healthy growing vegetation
- 8' wide pedestrian sidewalks. Sidewalk to be expanded to more generous dimension in front of retail use to serve as a potential outdoor dining space
- Building set back in accordance to zoning requirements
- Ample planting, lighting, benches and trash receptacles at each of the community greens
- Pedestrian scale lighting throughout, with cut-off fixtures

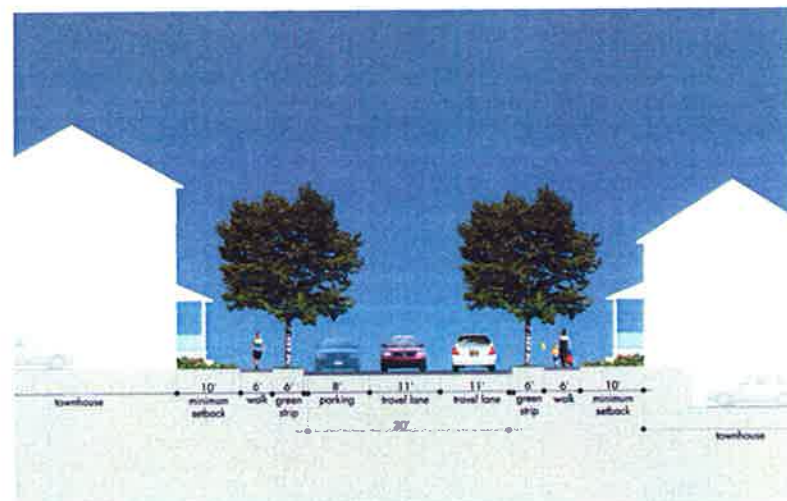
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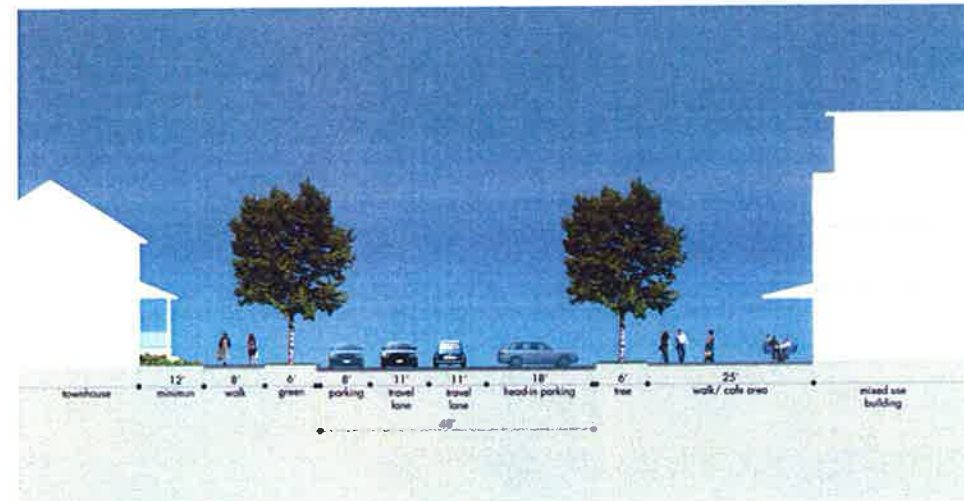
Section A-A': Marina Drive, 78' R.O.W.



Section B-B': Corrigan Street, 55' R.O.W.

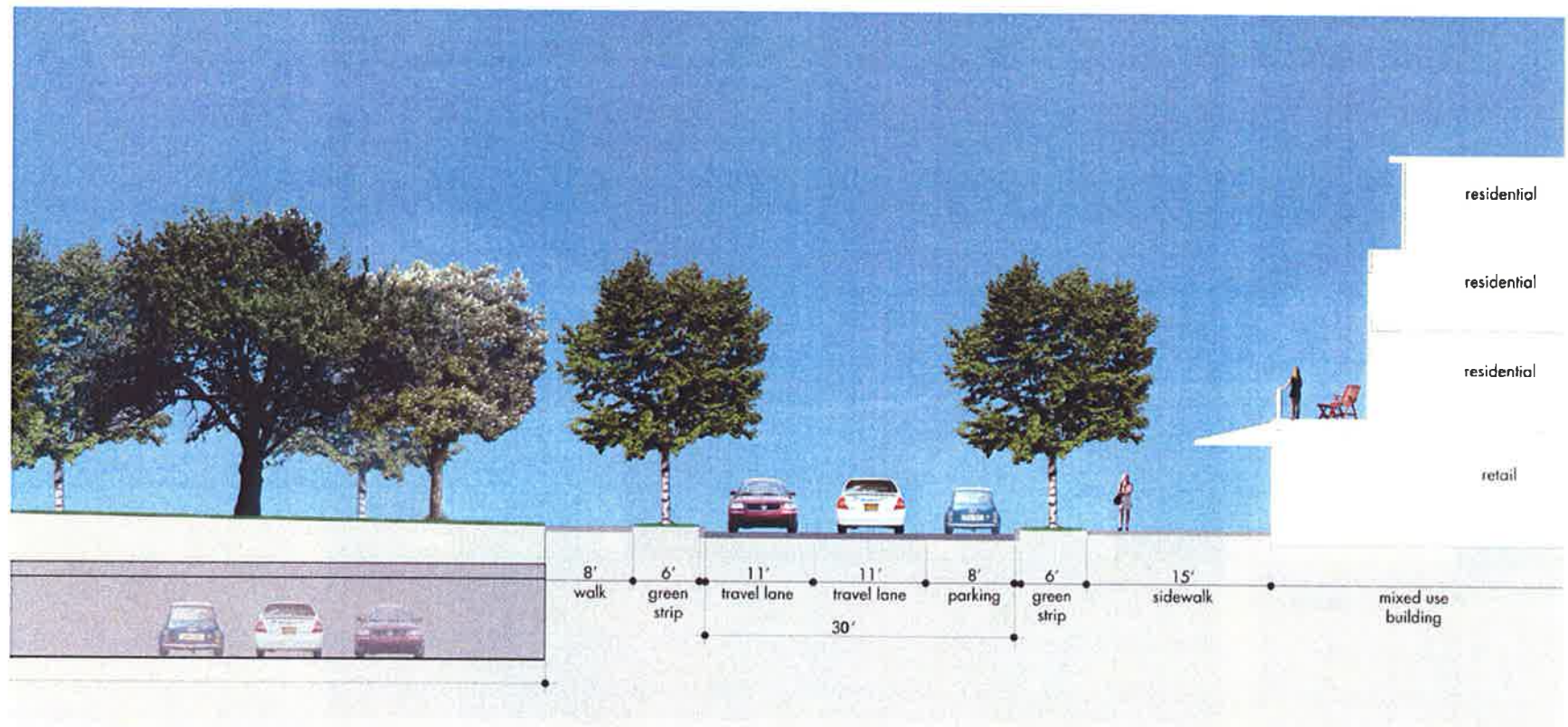


Section C-C': Marina Drive, 55' R.O.W.

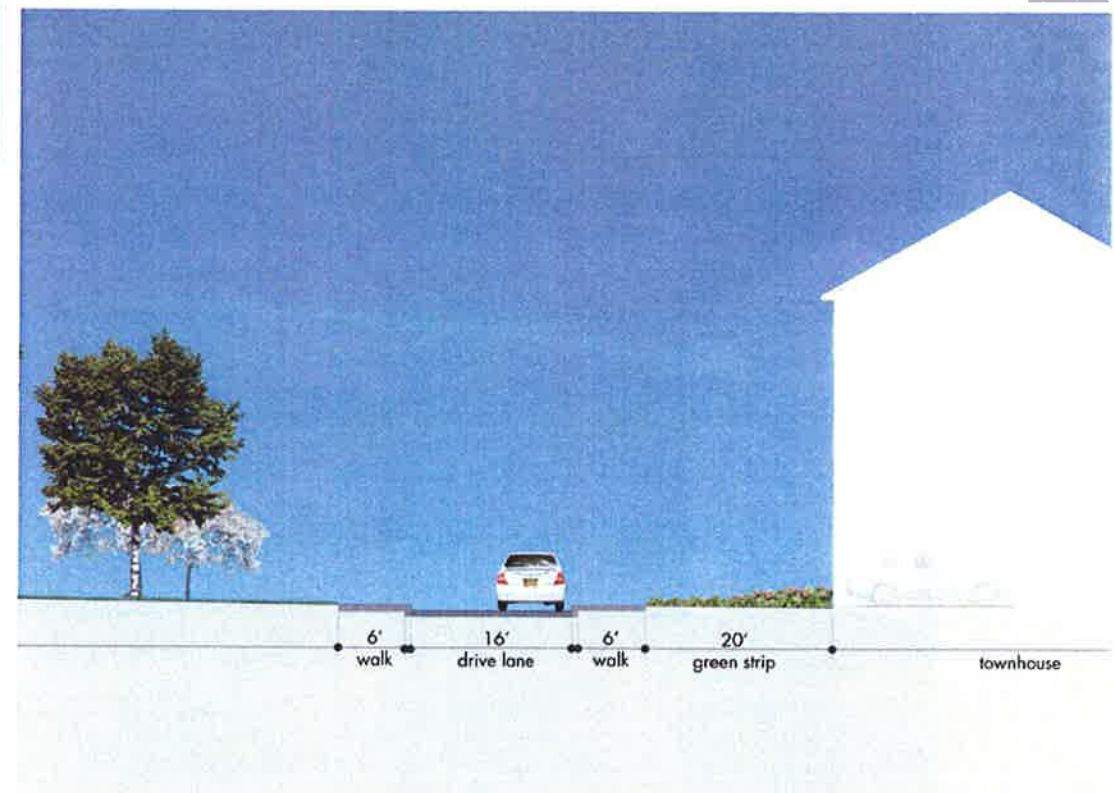


Section D-D': River Street, 94' R.O.W.

TYPICAL CROSS-SECTIONS:
PRIMARY STREETS

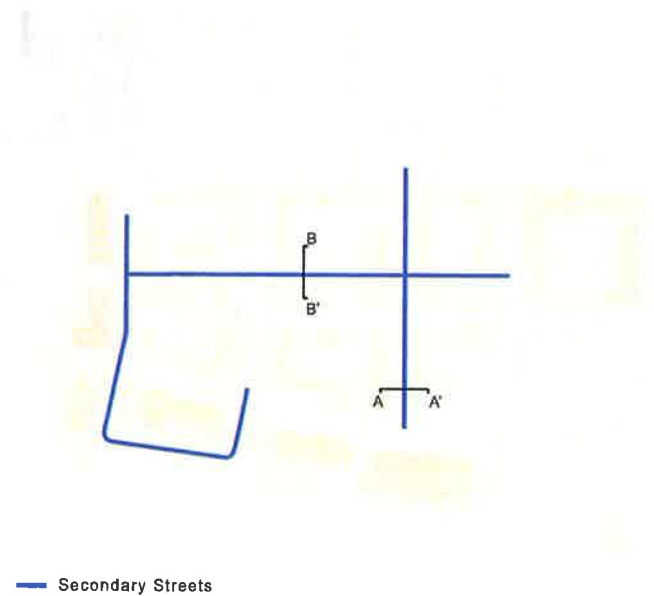


Section A-A': Hinch Street, 66' R.O.W.

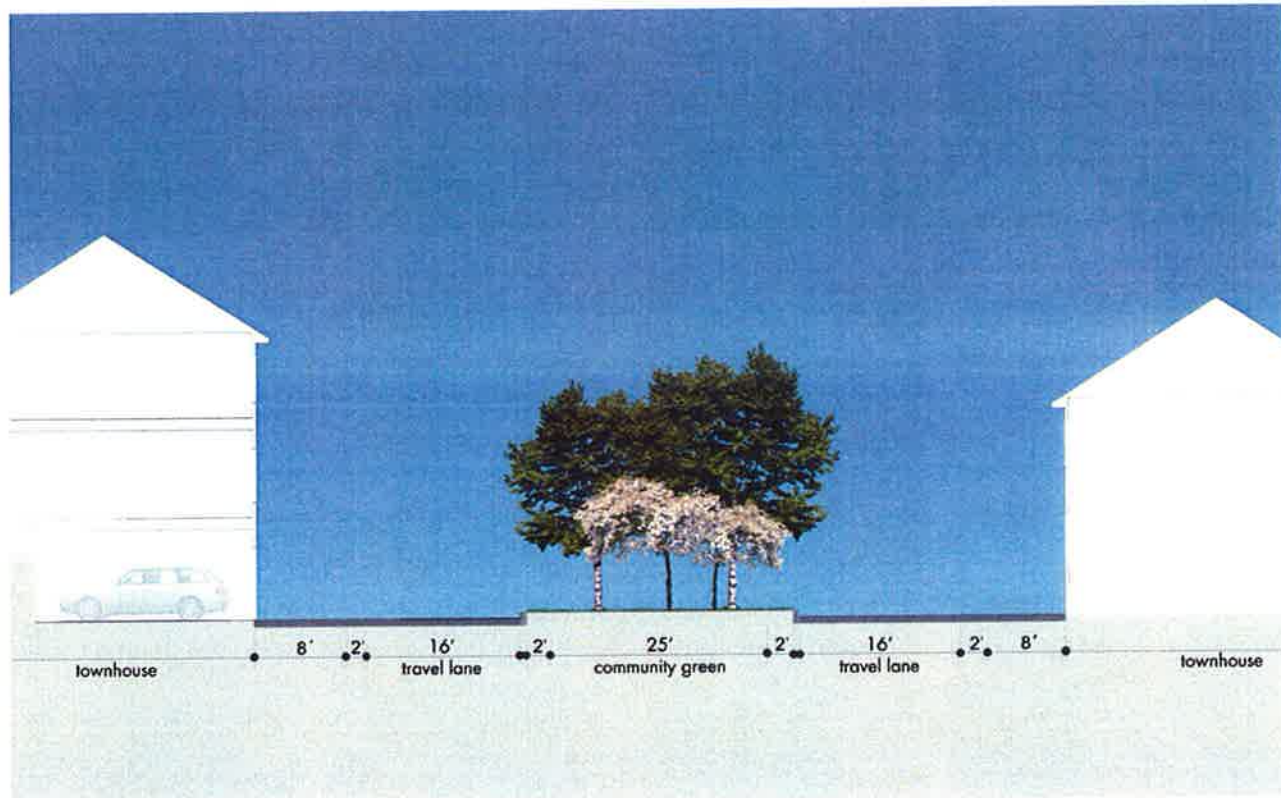


Section B-B': 28' R.O.W.

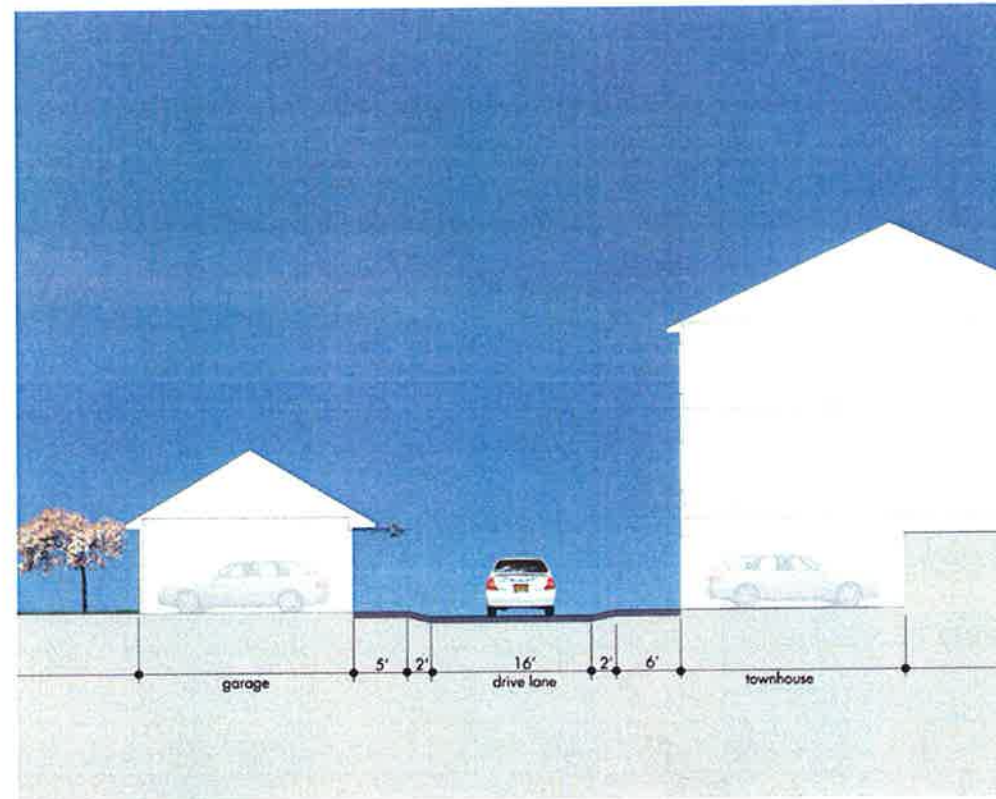
**TYPICAL CROSS-SECTIONS:
SECONDARY STREETS**



— Secondary Streets

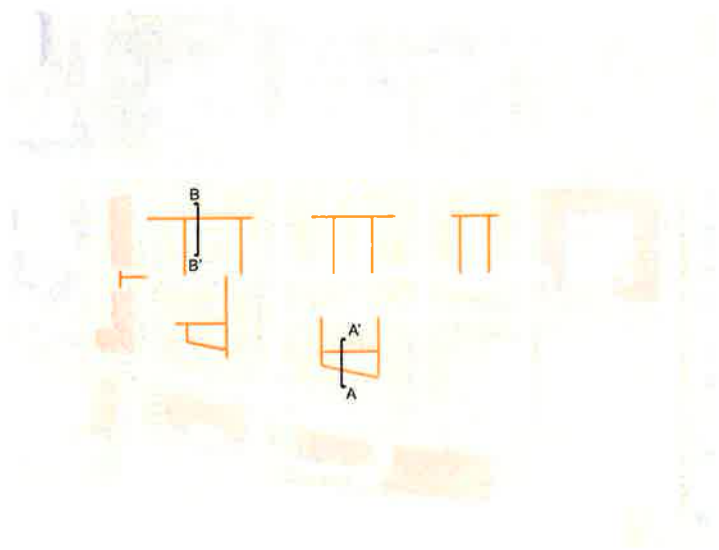


Section A-A': 20' R.O.W.



Section B-B': 20' R.O.W.

**TYPICAL CROSS-SECTIONS:
ALLEYS AND SERVICE WAYS**



— Alleys and Service Ways

Local Permits

Depending on the zoning established for the project site and proposed uses, the following local permits may be required to implement the development program.

- Site Plan Approval - from the Director of Zoning
- Special Permit - from the City Planning Commission
- Zoning Variances (area or use) - from the Zoning Board of Appeals

The Special Permit and Zoning Variance approvals processes involve public hearings, whereas the Site Plan Approval process does not. Each of these approvals is considered an "agency action" subject to the provisions of the New York State Environmental Quality Review Act (SEQRA) and Chapter 48 of the Code of the City of Rochester (see discussion of SEQRA under State Permits).

State Permits

New York State Environmental Quality Review Act (SEQRA) / Chapter 48 of Code of the City of Rochester

State, county, and local agency actions, including projects undertaken directly by the agency or indirectly through funding or permitting decisions, are subject to the provisions of SEQRA. City agency actions are also subject to the provisions of Chapter 48 of the Code of the City of Rochester. SEQRA and Chapter 48 reviews are designed to ensure that environmental impact review is incorporated into the decision-making process. Prior to undertaking an action, the agency must certify that all significant adverse environmental impacts have been avoided, minimized, and/or mitigated to the maximum extent practicable consistent with social, economic, and other essential considerations. This finding is to be based on information presented in an Environmental Assessment Form and/or Environmental Impact Statement.

It is understood that the City of Rochester has prepared a Generic Environmental Impact Statement (GEIS) addressing, among other projects, the redevelopment of the project site. This GEIS was issued as complete in March of 2001. To complete the SEQRA and Chapter 48 review of the proposed project, the city, through the Director of Zoning, will prepare a Supplemental Environmental Impact Statement (SEIS). This document will include site- and project-specific information to supplement the information presented in the GEIS. Following completion of the SEIS and prior to the issuance of Site Plan Approval, the Director of Zoning will prepare a Findings Statement concluding with the above-referenced certification.

Protection of Waters Permit (Article 15, Title 5)

A Protection of Waters Permit from the New York State Department of Environmental Conservation (DEC) is required for such activities as the disturbance of the bank of a "protected stream" and excavation in navigable waters of the state. The Genesee River is both a "protected stream", due to its water quality classification of 'B', and a navigable waterway. The removal of the existing bulkhead to create water access to the new marina, therefore, is an activity which requires the issuance of this permit.

Due to the proposed size of the activity (i.e., greater than 50 linear feet of bulkhead removal), the Protection of Waters Permit application will be processed as a "major project" application pursuant to the provisions of the New York State Uniform Procedures Act. Major project applications are subject to specific public notification and comment requirements. If the DEC determines that no public hearing is required, the review of the permit application will be completed within 90 days of the DEC's receipt of a complete application.

Coastal Zone Consistency Review

The proposed project is located within the coastal zone of New York State. As such, a review pursuant to the provisions of Section 307(c) of the Federal Coastal Zone Management Act of 1972 is required as a prerequisite to the issuance of any federal permit or financial assistance. The intent of this review is to determine whether the project is consistent with the provisions of New York State's Coastal Management Program. In New York State, the Coastal Management Program is administered by the Department of State. An applicant for a federal permit initiates the consistency review by preparing, and forwarding to the Department of State, a statement certifying the project's consistency with the provisions of the program. The Department of State then issues a statement of concurrence or non-concurrence with the applicant's findings. The City of Rochester has adopted a Local Waterfront Revitalization Program (LWRP) in partnership with the Department of State. The provisions of the LWRP are the provisions of New York State's Coastal Management Program within the boundaries of the City of Rochester. The LWRP is codified at Chapter 112 of the Code of the City of Rochester.

Pursuant to Chapter 112 of the Code of the City of Rochester, all city agencies are required to complete a consistency review of the LWRP before undertaking a proposed "action", regardless of whether a federal permit is required. Where a federal permit is not required, the consistency review is subject to the review and comment of the

Commissioner of the Department of Community Development. Ultimately, however, the Chapter 112 consistency determination is made by the agency proposing to undertake the "action".

State Pollutant Discharge Elimination System (SPDES) Permit

Pursuant to the provisions of Section 402 of the federal Clean Water Act, a permit is required for the discharge of stormwater from construction activities/sites to waters of the United States. In New York State, this permit is issued by the Department of Environmental Conservation (DEC) in the form of a SPDES permit. The DEC issued a SPDES General Permit (GP-02-01) for stormwater discharges from construction activities on January 8, 2003. This general permit will remain in effect until January 8, 2008. Provided future construction activities at the project site are conducted in compliance with the terms and conditions of the general permit, no individual permit or permit application will be required. The most significant condition of the general permit is the requirement that construction activities be conducted in conformance with the provisions of a project-specific Storm Water Pollution Prevention Plan (SWPPP). The SWPPP must, itself, have been prepared in compliance with the provisions of the New York State Stormwater Management Design Manual and the document entitled New York Standards and Specifications for Erosion and Sediment Control.

Federal Permits

Department of the Army Permit

A Department of the Army Permit from the U.S. Army Corps of Engineers (COE) is required for construction activities conducted below the elevation of "ordinary high water" within the navigable waters of the United States pursuant to the provisions of Section 10 of the Rivers and Harbors Act of 1899. The removal of the existing bulkhead wall along the Genesee River to establish water access to the new marina is an activity which will require this permit, as the work will involve construction below the elevation of ordinary high water.

An application for a Department of the Army Permit includes 8-1/2" x 11" engineering design plans and a completed application form. The review of an application typically requires four to nine months to complete, depending on the complexity of the project. A Department of the Army Permit cannot be issued until the New York Department of State either issues a statement of concurrence with the applicant's Coastal Management Program consistency certification or waives its consistency determination.

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Appendix F

Cost Estimate

ITEM	Quantity	Unit	Unit Cost	Construction Cost	Comments
General					
Mobilization	1	LS	100,000	\$ 100,000.00	One time expense
Site Preparation	28	AC	1500	\$ 42,000.00	Calling Dig Safe to locate all active utilities
Security / fencing / trailer set up	1	LS	75,000	\$ 75,000.00	
Erosion sediment control	2,800	LF	7	\$ 19,600.00	Along the river and Ontario park only
Demolition	1	LS	95,000	\$ 95,000.00	Removal of paving, curbing etc.
Construction Permit	1	LS	50,000	\$ 50,000.00	Based on a % of total construction cost
Sub Total				\$ 381,600.00	
Marina					
Basin excavation	54,500	CY	12	\$ 654,000.00	Majority of soil to be used on site
Soil from the marina taken off site	27,250	CY	35	\$ 953,750.00	Assume 50% is unsuitable (conservative)
Marina basin edge	1,590	LF	1,800	\$ 2,862,000.00	Steel sheeting w / soil anchors
Removal of existing bulkhead	280	LF	950	\$ 266,000.00	Making Connection to the G. river
Floating Docks	12,670	SF	35	\$ 443,450.00	Concrete or comparable quality
Anchor piles	32	EA	1,925	\$ 61,600.00	35' long each @ \$55 / LF
Utility hookup posts	50	EA	1950	\$ 97,500.00	Water, electric & cable service
Electric service lines	2,090	LF	22	\$ 45,980.00	Marine grade
Water Line	2,090	LF	28	\$ 58,520.00	Plastic
Cable / Telephone	2,090	LF	18	\$ 37,620.00	Combined service
Cleats, bumpers, fire extinguishers etc	1	LS	120,000	\$ 120,000.00	Basic hardware
Gangways	4	EA	35,000	\$ 140,000.00	Aluminum, 40 feet long
Sub Total				\$ 5,740,420.00	
Roads (New)					
River Street Extension	12,080	LF	376	\$ 4,542,080.00	2,11" lanes, 2, 8' parallel p. lanes & sidewalks
Hincher Street	330	LF	376	\$ 124,080.00	Lake Avenue to Marina Drive
Portside Drive	350	LF	376	\$ 131,600.00	Marina Drive To river edge promenade
New Drive	650	LF	376	\$ 244,400.00	Lake Avenue to river edge promenade
Alley Way	12,010	LF	150	\$ 1,801,500.00	30' ROW
Internal alleys	3,165	LF	120	\$ 379,800.00	26' ROW
Sub Total				\$ 7,223,460.00	
Roads (upgrade existing)					
Beach Ave extension	970	LF	173	\$ 167,810.00	Lake Avenue to River edge
Corrigan Street	630	LF	173	\$ 108,990.00	Lake Avenue to River Street
Hincher Street	230	LF	173	\$ 39,790.00	Marina Drive To New River Street
Portside Drive	380	LF	173	\$ 65,740.00	Lake Avenue to Marina Drive
Enhancements to Lake Avenue	1600	LF	310	\$ 496,000.00	New Lighting, planting, signage etc.
Marina Drive	980	LF	173	\$ 169,540.00	Beach Ave extension to Portside drive
Sub Total				\$ 1,047,870.00	
Utilities					
Water	13,410	LF	65	\$ 871,650.00	10" diameter / Hydrants @ 300" on Center
Storm sewer	13,410	LF	48	\$ 643,680.00	CB's and trunk lines
Sanitary Sewer	13,410	LF	75	\$ 1,005,750.00	8" diameter gravity line
Electric	13,410	LF	55	\$ 737,550.00	Underground
Telephone	13,410	LF	22	\$ 295,020.00	Underground
Cable	13,410	LF	12	\$ 160,920.00	Above ground
Gas	13,410	LF	38	\$ 509,580.00	6" diameter service
Sub Total				\$ 4,224,150.00	
Open space amenities					
Village center Park	48,400	SF	18	\$ 871,200.00	Soft park with benches, shade structures
Marina Edge Promenade	28,600	SF	12	\$ 343,200.00	1,430 LF, 20 feet wide
River edge promenade	12,000	SF	12	\$ 144,000.00	South of the existing Port building
Retrofit existing boat launch ramps	1	LS	150,000	\$ 150,000.00	Convert them to transient docking space
Lighting	294	EA	2,900	\$ 852,600.00	New street lights, @ 60 feet on center
Benches	260	EA	1200	\$ 312,000.00	Stanly
Trash receptacles	220	EA	650	\$ 143,000.00	Stanly
Signage (directional)	1	LS	30,000	\$ 30,000.00	For vehicular traffic
Signage (way finding)	1	LS	45,000	\$ 45,000.00	For pedestrian
Entrance gateway	1	LS	150,000	\$ 150,000.00	At River Street
New Drive Park	6,075	SF	12	\$ 72,900.00	Soft park with benches & lighting
Portside Drive Park	26,400	SF	12	\$ 316,800.00	Soft park with benches & lighting
Internal courtyards	33,500	SF	10	\$ 335,000.00	Soft Park with benches & lighting
Sub Total				\$ 3,765,700.00	
Buildings					
Apartment units	248	EA	143,750	\$ 35,650,000.00	1250 SF avg. @ \$115/sf = \$143,750.00
Town House units	147	EA	273,000	\$ 40,131,000.00	2100 SF avg. @ \$130/sf = \$273,000.00
Structure parking (Public)	400	EA	12,500	\$ 5,000,000.00	Public share of the internal garage
Retail	80,000	SF	85	\$ 6,800,000.00	Unfinished space
Underground Parking Garage	140	EA	14,500	\$ 2,030,000.00	Below the Village green, marina patrons & Public
Surface parking	80	EA	1,500	\$ 120,000.00	Across the street from the Roger Roebuck center
Site design cost for the Garage	1	LS	250,000	\$ 250,000.00	Curb cut, perimeter work etc.
Office	6000	SF	80	\$ 480,000.00	
Sub Total				\$ 90,461,000.00	
Total Project				\$ 112,844,200.00	
Contingency, 30%				\$ 33,853,260.00	12% for design, 18% for permitting & Construction
Grand Total				\$ 146,697,460.00	

To assist in reviewing project financing and implementation options, the master plan team has prepared an initial estimate of probable cost for the project. This estimate is based on preliminary design drawings, without a detailed understanding of the market targets for housing and other factors that will have significant impacts to the final project delivery cost. This estimate should be used as an order-of-magnitude guide only; as more detail about the project is developed, and site and construction issues are studied more closely, the cost estimate has the potential to change significantly.

The estimate is based on the following assumptions:

- All costs reflect 2006 dollars and no escalation or inflation has been included.
- The costs of removal of contaminated soils are based on disposal estimates provided to the master plan team by the City of Rochester; those costs assume City disposal, not a private contractor.
- Street construction and reconstruction costs assume the maximum extent of existing streets are preserved in the reconstruction effort, including existing underground utilities.
- Existing street lighting will be replaced with new for the purpose of consistency. Existing fixtures can be used for other civic projects.
- Unit costs for constructing the marina assumes dry construction and when complete, the connection to the river will be made as a last activity.
- Per square foot costs for housing construction assume "custom" level of finish.
- Costs for retail and office space assume raw space finish; tenant fit-out would be provided by tenants or through lease arrangements.
- No costs are carried for the reconstruction of the terminal building into the Lake Ontario Natural Resource Center; it is assumed that this project would be outside the scope of the general site redevelopment.
- A general 30% contingency has been added to the total estimate; this contingency would be used to pay for design fees, permit fees, project soft costs such as financing, and design development refinements of the project – it does not allow for inflation and escalation.

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PRIVATE INVESTMENT FEASIBILITY ANALYSIS

INTRODUCTION

Understanding the private investment implications of the Master Plan is critical to crafting an implementation strategy. The market analysis identified the number of supportable units by product type and price points. The development program is a response to the market analysis conclusions.

In the private investment feasibility analysis, the land use mix contemplated in the Plan is evaluated from an economic perspective. The project's projected revenues are compared to development costs to determine whether there is adequate financial return to attract private investors. Development cost estimates for utilities, roads, parks, public parking and the marina were prepared by Sasaki Associates. Development costs for the private uses were estimated by ZHA, Inc. Interviews with private developers, construction cost estimates from RS Means for the Rochester area, and national experience provide the basis for the cost estimates by ZHA.

To determine private investment feasibility, ZHA performs a variety of residual value analyses. On income generating land uses, ZHA employs a loan to value calculation, a return on investment ratio, and the discounted cash flow model to determine whether there is sufficient return to a private investor to attract developers. ZHA's methodology is to test investor feasibility assuming the development costs only associated with constructing the buildings and associated parking. Additional infrastructure improvements (utilities, parks, roads, marina) are excluded from the analyses. To the extent that the project's financial return exceeds adequate investor thresholds, the investor can incur additional costs associated with infrastructure and amenity development. The residual value analysis identifies the magnitude of additional cost the private investor can afford to pay while maintaining an adequate return on investment.

This analysis provides a preliminary indication of whether subsidy is required to attract private investment. If required, the magnitude of subsidy is determined by this analysis.

It is important to note that depending on the City's design and development requirements, actual development proposals may be quite different from the development programs tested herein. Therefore, the level of subsidy may change. The intent of this analysis is to identify the magnitude of subsidy required to implement the Plan. It is for the City to decide whether such funding can be obtained and/or whether the Plan justifies such a public investment.

Before soliciting development proposals it is important for the City to understand what it is willing and/or not willing to do to support implementation. The potential sources of funding should be understood before solicitation. The results of the feasibility analysis provide the information necessary to address such issues.

Investment Thresholds

A project's feasibility is tested by its ability to satisfy the following investment thresholds.

Income Producing Property

- Unleveraged internal rate of return of 10.75% to 11%. Both of these thresholds are within the ranges contained the Korpacs Real Estate Investment Survey, 2nd Quarter, 2006 for apartment buildings;
- Return on investment (stabilized net operating income divided by total development cost) of at least 8%. This threshold is based on industry standards and ZHA's experience in joint development.

For-Sale Property

- Sale proceeds must be 22 to 25 percent above unit development costs. This threshold is based on industry standards and ZHA's experience in joint development.

Plan Scenarios

The Master Plan is tested on two different land use mix scenarios. The land use mix scenarios are summarized in the Table below.

Development Scenarios Port of Rochester Master Plan		
	Scenario 1	Scenario 2
Townhouse	147	162
Low Density Multi-Family Residential	248	234
Moderate Density Multi-Family Residential	0	304
Retail /1	80,000	80,000
Office	6,000	6,000
Research Space /2	27,000	27,000

1. Includes 9,600 square feet already in the Ferry Terminal.
2. Research Space is in the Ferry Terminal.

The Master Plan contemplates a variety of residential products as well as retail and office uses. A description of each product type is summarized below.

Townhomes

Townhouse are assumed to be 2,100 square feet and for sale. Townhomes include their own garage as part of the unit. Townhouses are assumed to cost \$115 per square foot to develop (hard and soft costs, exclusive of land and infrastructure). The market analysis concluded that for-sale product can command prices between \$125 and \$175 per square foot. The following table highlights the basic economics of townhouse development given current market conditions.

For Sale Townhouse Development Economics Port of Rochester							
Gross Unit Size (Square Feet)	2,100						
Efficiency Factor	100%						
Net Unit Size (Square Feet)	2,100						
Development Cost /SF	\$115.00						
	Price Range /SF						
Sale Price /SF	\$125.00	\$140.00	\$145.00	\$150.00	\$160.00	\$170.00	\$175.00
Sale Proceeds	\$262,500	\$294,000	\$304,500	\$315,000	\$336,000	\$357,000	\$367,500
Development Cost	\$241,500	\$241,500	\$241,500	\$241,500	\$241,500	\$241,500	\$241,500
Investor Return	9%	22%	26%	30%	39%	48%	52%
	Investor Return Threshold: 22% - 25%						

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls\townhouse economics

While not an intensive use of the land, townhouses can support additional infrastructure costs.

Low Density Multi-Family Residential

With an average density of 25 dwelling units per acre, low density multi-family residential products can accommodate their own parking without a structure (assuming an average of 1.5 parking spaces per unit). The parking plan would include parking under the building (basement level) and limited parking at the first floor level.

Apartment development cost is assumed to be \$130 per gross square foot. Apartment costs are higher because they involve multiple story construction and elevators. A typical building has an 85 percent efficiency factor to compensate for

the elevator, halls, and stairwells. This means that only 85 percent of the developed square feet are rentable or saleable.

The market analysis concludes that monthly rents from \$1.25 to \$1.40 per square foot are supportable in the market while sale prices may range from \$125 to \$175 per square foot. According to the Sasaki Plan the average apartment/condominium size is 1,250 gross square feet or 1,060 rentable/saleable square feet. The following table highlights the basic economics of small apartment buildings given current market conditions.

Low Density Multi-Family Residential Development Economics Port of Rochester									
Gross Unit Size (Square Feet)	1,250								
Efficiency Factor	85%								
Net Unit Size (Square Feet)	1,060								
Vacancy Operating Expense	33%								
Development Cost /SF	\$130.00								
	FOR SALE SCENARIO								
	Price Range /SF								
Sale Price /SF	\$125.00	\$140.00	\$150.00	\$160.00	\$170.00	\$180.00	\$190.00	\$200.00	\$210.00
Sale Proceeds	\$132,500	\$148,400	\$159,000	\$169,600	\$180,200	\$190,800	\$201,400	\$212,000	\$222,600
Development Cost	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500
Investor Return	-18%	-9%	-2%	4%	11%	17%	24%	30%	37%
	Investor Return Threshold: 22% - 25%								
	FOR RENT SCENARIO								
	Rent /SF/Month								
Sale Price /SF	\$1.25	\$1.35	\$1.45	\$1.50	\$1.55	\$1.60	\$1.65	\$1.70	\$1.75
Annual NOI	\$10,653	\$11,505	\$12,357	\$12,784	\$13,210	\$13,636	\$14,062	\$14,488	\$14,914
Development Cost	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500	\$162,500
Investor Return	6.56%	7.08%	7.60%	7.87%	8.13%	8.39%	8.65%	8.92%	9.18%
	Investor Return Threshold: 8% - 8.5%								

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls\low density residential

Note that a sale price in excess of what the current market can bear is required to satisfy investment thresholds. This may be reasonable given the addition of the marina which would allow owners to have a boat in their neighborhood. For purposes of the financial feasibility analysis, ZHA has assumed that condominiums will command prices of \$190 per square foot.

The same is true under a rental arrangement. Alone apartments must be able to command rents of \$1.52 per square foot per month to be of interest to the standard investor. The inclusion of retail reduces the required rent to approximately \$1.50 per square foot. Once again, this may be reasonable given the addition of the marina which would allow owners to have a boat in their neighborhood. For purposes of the financial feasibility analysis, ZHA has assumed

that the rental units can command prices of \$1.50 per square foot to support project development costs.

Moderate Density Apartment Buildings

In the higher density multi-family product the density requires structured parking. Structured parking is estimated to cost \$15,000 per space. This cost assumes that the Site's topography is used strategically to reduce structured parking development costs. Apartment development cost is assumed to be \$130 per square foot.

The following table highlights the basic economics of moderate density multi-family residential development given current market conditions.

**Moderate Density Multi-Family Residential Development Economics
Port of Rochester**

Gross Unit Size (Square Feet)	1,250
Efficiency Factor	85%
Net Unit Size (Square Feet)	1,060
Vacancy Operating Expense	33%
Development Cost /SF	\$130.00
Structured Parking Cost/Space	\$15,000
Cost of to Buy/Rent Add't Space	\$25,000 \$90.00 /Month

FOR SALE SCENARIO								
Price Range /SF								
Sale Price /SF	\$125.00	\$140.00	\$160.00	\$170.00	\$180.00	\$190.00	\$200.00	\$210.00
Sale Proceeds	\$145,000	\$160,900	\$182,100	\$192,700	\$203,300	\$213,900	\$224,500	\$235,100
Development Cost	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000
Investor Return	-22%	-13%	-2%	4%	10%	16%	21%	27%
Investor Return Threshold: 22% - 25%								

FOR RENT SCENARIO								
Rent /SF/Month								
Sale Price /SF	\$1.40	\$1.50	\$1.60	\$1.70	\$1.75	\$1.80	\$1.90	\$2.00
Annual NOI	\$12,021	\$12,874	\$13,726	\$14,578	\$15,004	\$15,430	\$16,283	\$17,135
Development Cost	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000	\$185,000
Investor Return	6.50%	6.96%	7.42%	7.88%	8.11%	8.34%	8.80%	9.26%
Investor Return Threshold: 8% - 8.5%								

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls\mod density economics

The basic economics assume that one parking space comes with the rent/price of the unit. Tenants/owners must pay for the second parking space. With the additional cost of the parking, condominium developers would have to obtain prices in excess of \$200 per square foot to make the project feasible. As a

rental project, rents of at least \$1.73 per square foot per month must be obtained to satisfy normal investment thresholds. It is important to note that in a mixed-use project ground floor retail can contribute project feasibility.

Retail

In the Plan, retail is envisioned on the ground floor of many of the buildings. For purposes of the financial analysis, retail development costs exclude tenant improvements and represent the costs associated with delivering a warm, dry shell. Development costs are assumed to be \$110 per square foot. The tenant will pay the additional costs associated with tenant improvements.

The following table highlights the basic economics of retail development given current market conditions.

**Retail Development Economics
Port of Rochester**

Gross Unit Size (Square Feet)	2,000
Efficiency Factor	100%
Net Unit Size (Square Feet)	2,000
Vacancy Operating Expense	10%
Development Cost /SF	\$110.00
Structured Parking Cost/Space	\$0
Cost of to Buy/Rent Add't Space	\$0

FOR RENT SCENARIO					
Rent /SF/Month					
Rent /SF	\$9.00	\$10.00	\$11.00	\$12.00	\$13.00
Annual NOI	\$16,200	\$18,000	\$19,800	\$21,600	\$23,400
Development Cost	\$220,000	\$220,000	\$220,000	\$220,000	\$220,000
Investor Return	7.36%	8.18%	9.00%	9.82%	10.64%
Investor Return Threshold: 8% - 8.5%					

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls\retail

The obtainable retail rent is very sensitive to the location, visibility and access to the retail unit. Those retail units on Lake Street near the Park will likely be the most valuable. An average triple net rent of \$12.00 per square foot is reasonable for this location. Retail can drive value into the project.

Office Space

There is office space programmed in the old Ferry Terminal. This space simply needs minor alterations to lease to an office user. ZHA has assumed a adaptive re-use cost of \$80.00 per square foot. A triple net rental rate of \$14.00 is

projected. The following table highlights the basic economics of office space given current market conditions.

The following table highlights the basic economics of the office adaptive reuse program given ZHA's understanding of current market conditions.

**Office Development Economics
Port of Rochester**

Gross Unit Size (Square Feet)	6,000
Efficiency Factor	100%
Net Unit Size (Square Feet)	6,000
Vacancy Operating Expense	5%
Development Cost /SF	\$80.00
Structured Parking Cost/Space	\$0
Cost of to Buy/Rent Add't Space	\$0

FOR RENT SCENARIO

	Rent /SF/Month				
Rent /SF	\$13.00	\$14.00	\$15.00	\$16.00	\$17.00
Annual NOI	\$74,100	\$79,800	\$85,500	\$91,200	\$96,900
Development Cost	\$480,000	\$480,000	\$480,000	\$480,000	\$480,000
Investor Return	15.44%	16.63%	17.81%	19.00%	20.19%
<i>Investor Return Threshold: 8% - 8.5%</i>					

Source: ZHA, Inc.
F:\50030 Port of Rochester[new Master Plan Financials.xls]office economics

Office generates a great deal of value to the project because the Ferry Terminal has been built. The market analysis identified the potential for 51,000 to 76,000 square feet of office space at the Port of Rochester. If additional office can be made available for rent in the Ferry Terminal it will benefit the economics of the project.

PRIVATE INVESTMENT FEASIBILITY: SCENARIO I: LOW DENSITY

Assumptions

The key assumptions underlying the feasibility analysis are as follows:

FOR SALE PRODUCT – TOWNHOMES

- In this Scenario, there are 147 townhouse units with their own independent parking garages as part of the unit.

RENTAL PROPERTY – LOW DENSITY MULTI-FAMILY RESIDENTIAL

- In this scenario there are 248 low density multi-family residential units.
 - One-half of these units are assumed to be condominium and one-half rental.
 - Rents are assumed to be \$1.50 per square foot per month (2006 dollars).
 - Vacancy and collection loss is assumed to be 5 percent of gross revenue potential per year.
- Operating costs (maintenance, property taxes, management, reserve for replacement) are assumed to be 28 percent of gross revenue.

RENTAL PROPERTY – RETAIL

- There are 70,000 square feet of retail in this Scenario. 9,600 square feet of this space are currently in the Terminal building (generating minimal return to the City). Therefore, this analysis tests the residual value of 60,400 square feet of privately developed retail.
- The retail space is projected to lease-up as follows:
 - 60 percent occupied in Year 1
 - 75 percent occupied in Year 2
 - 90 percent occupied in Year 3 and stabilized
- Retail rents are assumed to be \$12.00 per square foot, triple net for shell space.
- A 10 percent operating expense is assumed on the retail space to account for management and turnover.

RENTAL PROPERTY – OFFICE

- The development program includes 6,000 gross square feet of office space;
- A development cost of \$80.00 per square foot is assumed to adapt the office space for multi-tenant use;
- Because there is so little of it, the office space is projected to be fully leased in Year 1.
- Office rent is assumed to be \$14.00 per square foot, triple net.
- A 5 percent operating expense is assumed on the office space to account for management and collection loss.

Conclusions

Given the assumptions, the residual value analysis concludes that the cash flow generated by the Project is more than sufficient to cover the costs associated with the development of the residential and commercial buildings.

**Lower Density Scenario
Residual Value Private Development Projects
Port of Rochester Master Plan**

Product Tenure	Low	High
Rental	\$1,315,000	\$1,795,000
For-Sale	\$1,600,000	\$3,300,000
Residual Value	\$2,900,000	\$5,100,000

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls]conc

Under the lower density scenario the private development community should be able to contribute \$2.9 million to \$5.1 million towards infrastructure. The range depends on the investor's return thresholds.

PRIVATE INVESTMENT FEASIBILITY: SCENARIO II – MODERATE DENSITY

Assumptions

The key assumptions underlying the feasibility analysis are as follows:

FOR SALE PRODUCT – TOWNHOMES

- In this Scenario, there are 162 townhouse units.

FOR SALE PRODUCT – MODERATE DENSITY CONDOMINIUMS

- In this scenario there are 304 moderate density multi-family residential condominiums in two buildings.
- Sale prices are projected to be \$190 per square foot.
- One parking space is included in the sales price with additional spaces costing \$25,000 per space.

RENTAL PROPERTY – LOW DENSITY MULTI-FAMILY RESIDENTIAL

- In this scenario there are 234 low density multi-family residential units.
- All of these units are assumed to be rental.
- Rents and operating characteristics are the same as Scenario I.

RENTAL PROPERTY – RETAIL

- The development program and assumptions for retail are the same as Scenario I.

RENTAL PROPERTY – OFFICE

- The development program and assumptions for office are the same as Scenario I.

Conclusions

Given the base assumptions, the residual value analysis concludes that the Project is not feasible from a private investor's perspective. The for-sale moderate density condominiums are not financially feasible at a price point of \$190 per square foot.

**Higher Density Scenario
Residual Value Private Development Projects
Port of Rochester Master Plan**

Product Tenure	Low	High
Rental	\$1,375,000	\$2,175,000
For-Sale	(\$2,990,000)	(\$3,560,000)
Residual Value	(\$1,600,000)	(\$1,385,000)

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls]conc2

To offset the costs associated with the building and structured parking requires a sales price of at least \$205 - \$210 per square foot. These sale prices may be achievable with the marina and amenities planned, but these will be among the highest in the market area.

At a price of \$210 per square foot, an average sized unit (1,060 square feet) would cost, \$223,000. If such a price can be obtained, the higher density scenario generates the following residual value.

**Higher Density Scenario With Condo Sale Price @ \$210/sf
Residual Value Private Development Projects
Port of Rochester Master Plan**

Product Tenure	Low	High
Rental	\$1,375,000	\$2,175,000
For-Sale	\$1,900,000	\$4,900,000
Residual Value	\$3,300,000	\$7,075,000

Source: ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls]Sheet30

Residual value is highly sensitive to development costs and achievable rents and prices.

RESEARCH SPACE

Under both Scenarios 27,000 square feet of research space is programmed for the Ferry Terminal. The rent received by the City for the use of this space by a research entity could help to offset the costs associated with the Port's redevelopment.

It is assumed that the City will continue to own the research space and rent it to a non-profit entity. It is also assumed that the occupant of the space is responsible for all of the capital costs associated with fitting out the space and all operating costs. Therefore, the City's rent is free and clear of all costs.

**Research Space Rental Implications
Port of Rochester**

Rent /SF (NNN) Cash Flow	\$5.00	\$6.00	\$7.00	\$8.00	\$9.00	\$10.00
	\$135,000	\$162,000	\$189,000	\$216,000	\$243,000	\$270,000
Supportable Bond /1	\$1,500,000	\$1,900,000	\$2,200,000	\$2,500,000	\$2,800,000	\$3,100,000

1. 6% interest over 20 year term.

Source: ZHA, Inc.
F:\50030 Port of Rochester\[new Master Plan Financials.xls]research

The value of the rental revenue is illustrated on the following table. ZHA determined the supportable bond amount given the annual rental revenue given an interest rate of 6 percent over 20 years.

INFRASTRUCTURE, OPEN SPACE AND MARINA COSTS

Significant infrastructure and open space improvements are contemplated in the Master Plan as well as a marina. Together these improvements cost a total of \$38.7 million.

**Infrastructure, Open Space and Marina Costs
Port of Rochester Master Plan
August, 2006**

Improvement/Task	Cost
Marina	\$5,740,420
Roads (New)	\$7,223,460
Roads (Upgrade Existing)	\$1,047,870
Utilities	\$4,224,150
Open Space Amenities	\$3,765,700
General	\$381,600
Public Parking	\$7,400,000
Sub-Total	\$29,783,200
Contingency, 30%	\$8,934,960
Total	\$38,718,160

Source: Sasaki Associates
F:\50030 Port of Rochester\[Master Plan construction cost1.xls]cost summary

The City's capital improvement program, however, has already allocated approximately \$12.9 million to pay for these types of improvements in the Port area.

**Infrastructure, Open Space and Marina Costs and City Capital Improvement Program
Port of Rochester Master Plan**

Improvement/Task	Cost	Existing CIP		Total	Net Cost
		FY '07 - '08	FY '08 - '09		
Marina	\$5,740,420	\$3,493,000		\$3,493,000	\$2,247,420
Roads (New)	\$7,223,460	\$1,500,000	\$1,000,000	\$2,500,000	\$4,723,460
Roads (Upgrade Existing)	\$1,047,870			\$0	\$1,047,870
Utilities	\$4,224,150			\$0	\$4,224,150
Open Space Amenities	\$3,765,700			\$0	\$3,765,700
General	\$381,600			\$0	\$381,600
Public Parking	\$7,400,000		\$2,000,000	\$2,000,000	\$5,400,000
Other	\$0	\$4,200,000	\$700,000	\$4,900,000	(\$4,900,000)
Sub-Total	\$29,783,200	\$9,193,000	\$3,700,000	\$12,893,000	\$16,890,200
Design/Contingency	\$8,934,960	na	na	na	\$8,934,960
Total	\$38,718,160	\$9,193,000	\$3,700,000	\$12,893,000	\$25,825,160

Source: Sasaki Associates; City of Rochester
F:\50030 Port of Rochester\[costs 2.xls]Sheet2

A portion of the marina, garage, and roads are already funded. Additional funding is required to complete these projects as well as utility improvements and the Master Plan's open space program.

Under Scenario 1, the private development projects can be expected to pay for \$2.9 to \$5.5 million. Assuming a rental rate of \$8.00 per square foot for the Research Space in the Terminal, this lease can leverage an additional \$2.2 million.

**Funding Gap
Port of Rochester Master Plan
Scenario 1 Development Program**

Infrastructure/Amenity Cost	\$38,718,160	
Less: CIP	(\$12,893,000)	
Net Cost	\$25,825,160	
Developer Contribution		
Low	(\$2,900,000)	
High	(\$5,100,000)	
Cost Net of CIP & Developer Contribution	\$20,725,160	to \$22,925,160
Bond From Research Lease @ \$8 /SF	(\$2,500,000)	
Cost Net of CIP, Developer Contribution, and Research Lease	\$18,225,160	to \$20,425,160

Source: Sasaki Associates; ZHA, Inc.
F:\50030 Port of Rochester\costs 2.xls]Sheet7

Redevelopment of the Site can support 20 to 30 percent of the infrastructure and amenity costs proposed in the Plan.

Under Scenario 2 with higher density residential buildings achieving sale prices of \$210 per square foot the gap lowers to --.

**Funding Gap w/ Higher Density & Sale Prices @ \$210/sf
Port of Rochester Master Plan
Scenario 1 Development Program**

Infrastructure/Amenity Cost	\$38,718,160	
Less: CIP	(\$12,893,000)	
Net Cost	\$25,825,160	
Developer Contribution		
Low	(\$3,300,000)	
High	(\$7,075,000)	
Cost Net of CIP & Developer Contribution	\$18,750,160	to \$22,525,160
Bond From Research Lease @ \$8 /SF	(\$2,500,000)	
Cost Net of CIP, Developer Contribution,	\$16,250,160	to \$20,025,160

Source: Sasaki Associates; ZHA, Inc.
F:\50030 Port of Rochester\costs 2.xls]Sheet8

TAX INCREMENT FINANCING

While tax increment financing has not been used much in New York State, it is a tool that may be worthy of further investigation. In New York, tax increment financing can be used in circumstances where the site is "blighted" and it can be proven that it is not possible for the private sector to implement the project without subsidy.

In a tax increment district, property tax revenue is frozen at a certain point in time. As properties in the District appreciate and/or new development occurs, net new tax revenues are generated, these incremental tax revenues can be used to fund public improvements such as public parking, streets, utilities, etc. in the District. The incremental tax revenue can be used to secure a revenue bond or be used to pay debt service on a general obligation bond or be used as cash to pay for public investments.

The market value Scenario I (the lower density scenario) is over \$100 million. The Research Space is assumed to be tax exempt and, as such, is not calculated in taxable value. Given the City's current property tax rates, at build-out the Project will generate \$3.7 million in annual tax revenue. If all of this incremental tax revenue can be captured in a TIF district, it could leverage over \$20 million in capital.

**Estimated Property Taxes and Supportable Capital
Port of Rochester Master Plan
At Build-Out and Stabilized Occupancy**

	Market Value	Equalization Rate	Property Tax Rate	Annual Property Tax Revenue
For-Sale Residential	\$71,205,712	1.0	21.19	\$1,508,800
Rental Property	\$48,524,000	1.0	45.175	\$2,192,100
Total	\$119,729,712			\$3,700,900
Supportable Capital (Interest @ 6% over 20 Years)				
	Debt Coverage 1.0			\$42,449,000
	Debt Coverage 2.0			\$21,225,000

Source: City of Rochester; ZHA, Inc.
F:\50030 Port of Rochester\new Master Plan Financials.xls]Sheet4

There are a number of issues to consider with tax increment financing. A key consideration with tax increment financing is timing and risk. The capital markets penalize or reject tax increment bonds whose security is based solely on a speculative project with a multi-phased build-out. TIF bonds work best when there is an existing demonstrated increment and there is a simple, low risk real estate development project on the horizon. In most cases, the reason TIF is considered as a financing vehicle is for the very reason that such an environment does not exist!

To address the timing and risk issues, some cities have established TIF districts, paid for improvements out of the general fund or using general obligation bonds, and used the subsequent tax increment to pay the City back. The financing terms are much better this way, however, the City's full faith and credit is on the line.

Appendix H

Reuse of the Terminal Building

Introduction

The study of the Ferry Terminal Building is to provide a visual evaluation of the interior and exterior structure with the purpose of addressing possible reuse options with a concept level sketch. The study is not intended as an extensive evaluation of the condition of the building and building systems.

The SUNY Brockport Natural Resource Center of Lake Ontario program was incorporated into several building reuse options. It was believed that this program was a good use of the available space in the building. The space program used in the scenarios was provided by SUNY Brockport and Bergmann Associates.



Figure 6. Ferry Building looking up river



Figure 7. Ferry Building from street

Summary of Building Characteristics

The building's historic brick façades are attractive for many new uses. The original riverside façade of the Ferry Building is of historic significance.



Figure 8. River Façade



Figure 9. River Façade Detail

The terraced walk at the river's edge and the second floor terrace at the building provide an ideal setting for views and outdoor uses such as dining, strolling and gathering. The large terrace at the second floor has beautiful and commanding views of the river and the lake.



Figure 10. Terrace looking down river to lake

There are areas on the first floor where there is no second floor directly above. This allows for the possibility of two story height spaces. This further increases the possibility for dramatic spaces, or even mezzanines within these first floor spaces. This also allows for visual connection from the first floor spaces up to the second, if so desired.

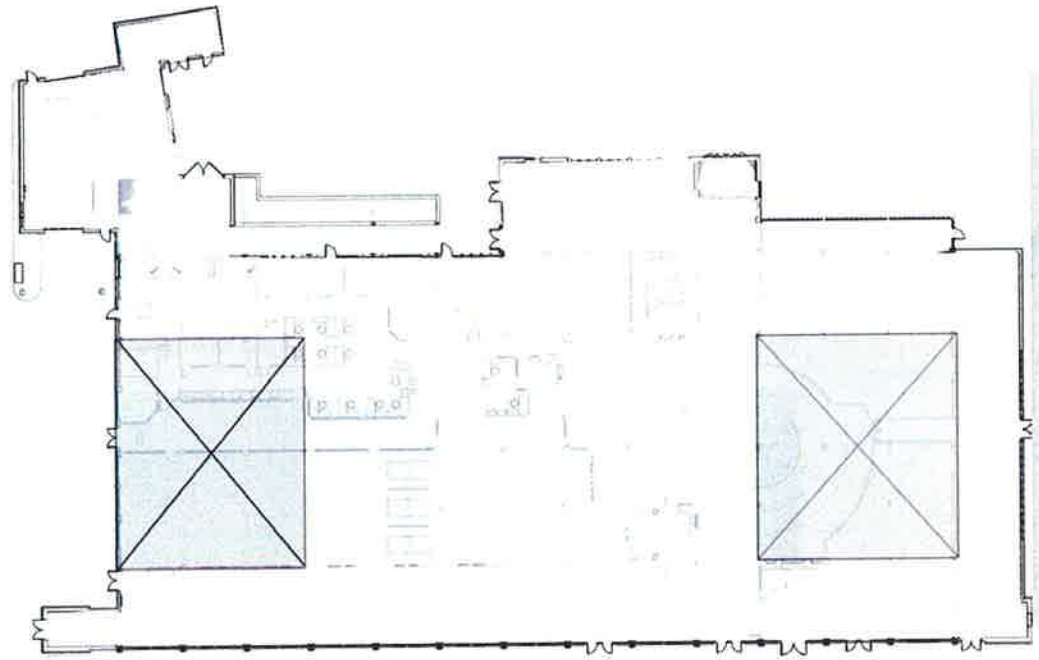


Figure 11. Diagram showing two story height opportunities

The building has a deep plate and is better suited to more open space uses. This is the case especially on the first floor, which is larger than the second floor. The open spaces will allow daylight from the exterior to reach the interior areas.



Figure 12. Interior first floor

Description of Building

The building was constructed originally as a ferry terminal in the 1920's. The building was used as a warehouse during the middle of the century and then fell into disrepair. In 2003, the building was developed into a Ferry Terminal. The building went through a substantial renovation, almost a total rebuilding, to accommodate its present use as customs operations, boarding and disembarking of the ferry, and a food court for waiting passengers.



Figure 13. Ferry Terminal Building

The Ferry Terminal consists of three parts: the Link building to the southwest, a utility building to the west and the Main building. These parts are physically connected.

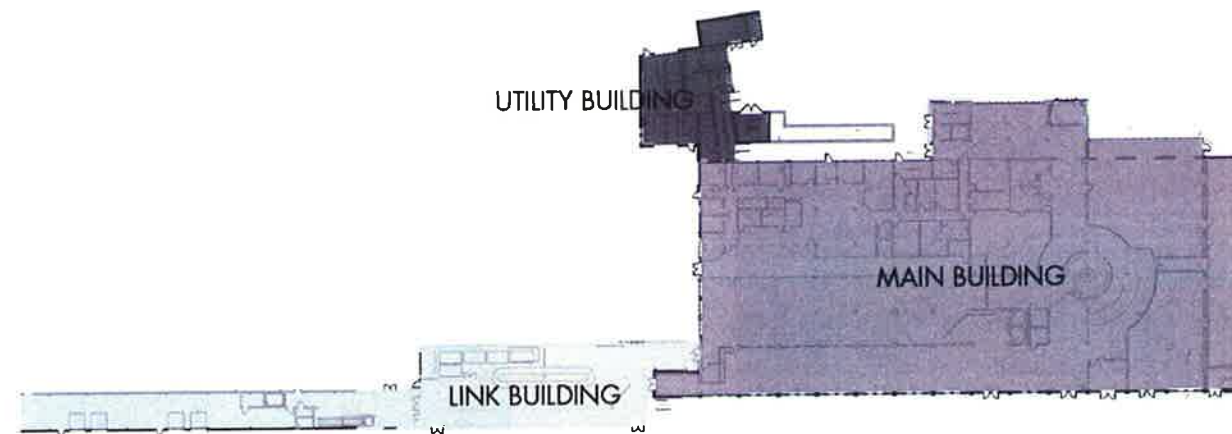


Figure 14. Ferry Terminal Building diagram

Link Building

The Link building consists of covered escalators, ramps, and elevators that provide embarking and disembarking access for the ferry. This part is specialized to its present use. It was determined that the land area on which this part of the ferry terminal sits is more valuable when used for new buildings. Reuse of this part of the Ferry Terminal was not considered in this Master Plan.



Figure 15. Interior of Link Building

Utility Building

The utility building was added in 2003 and sits at the parking lot side of the Ferry Terminal. This structure houses the emergency generator, the electrical transformer, the main boiler room that supplies heat to the building, a loading dock, the main electrical room, main water room, and main gas meter room. This structure, although functionally vital to the building, is not in an ideal location at the front of the Ferry Terminal Building. These utility rooms and services would be better situated around the corner to the southwest of the Main Building out of sight and out of the way of future development of the entry and site.



Figure 16. Utility Building

Main Building

The Main Building consists of two stories. A total of 53,200 gross square feet (gsf) is divided into a 37,700 gsf first floor and a 15,500 gsf second floor.

The floor to floor height (19'-3"), and possible ceiling height, is quite large on the first floor. This will allow many possibilities for creating dramatic, large, open spaces on the first floor. The second floor has a more conservative floor to floor height (11' to 12'). Careful coordination of HVAC and lighting in the ceiling will be necessary to allow for taller ceilings.

The façade is brick and has cast stone as well as stucco accent areas. During the renovations in 2003, small areas such as entries and egress stairs were added to the building to the west, the south west and to the north that covered the existing brick façade in those areas. The original brick exterior wall is visible along the river facing east, at the south and partially at the west. The new exterior portions have brick, cast stone, stucco, and standing seam roofs. The original, main part of the building has a low slope roof that was replaced during this 2003 renovation.



Figure 17. Entry of Main Building

Structure

The structure within the building was substantially revised in 2003. A new steel framing structure for the second floor and a new concrete first floor slab were installed.

Systems

All mechanical and electrical systems were replaced during the 2003 renovations. The main electrical room and electrical transformer as well as the gas fired boilers are located in the utility building. The air handling units are located on the roof of the main building. The capacity of these systems was not part of this study and will need further study as to their appropriate sizing for the various reuses suggested in this study.



Figure 18. Roof top units

Code implications

The steel structure has spray fireproofing according to the as-built drawings provided. The building has an automatic sprinkler system throughout.

Presently, the occupancy type is 'B' Business, with A-2 Assembly for the Restaurants as an accessory use.

There is an elevator for handicap and convenience access to the second floor.

Scenarios

Four scenarios were identified in this study.

Three of the scenarios illustrate the SUNY Brockport Natural Resource Center of Lake Ontario, a restaurant(s), and additional office space(s) for lease within the layouts.

Scenario A

This scenario places the Natural Resource Center program all on first floor. Restaurant/retail use is shown on the remaining first floor area. Two 'generic' office suites are shown on the second floor. It provides a relatively small retail/restaurant space right at the main entry. The NRC Interpretive Center is located on the first floor towards the river.

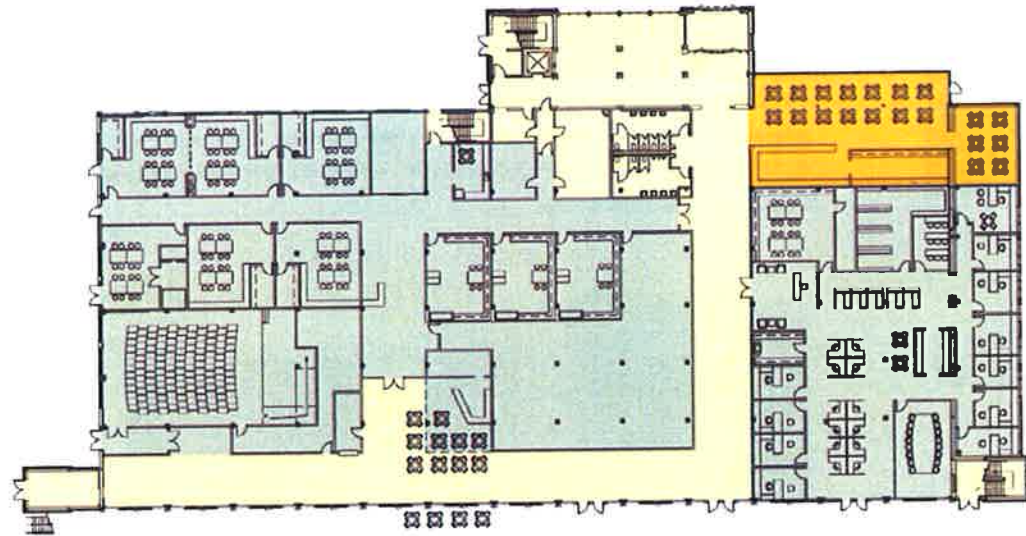


Figure 19. Scenario A First Floor

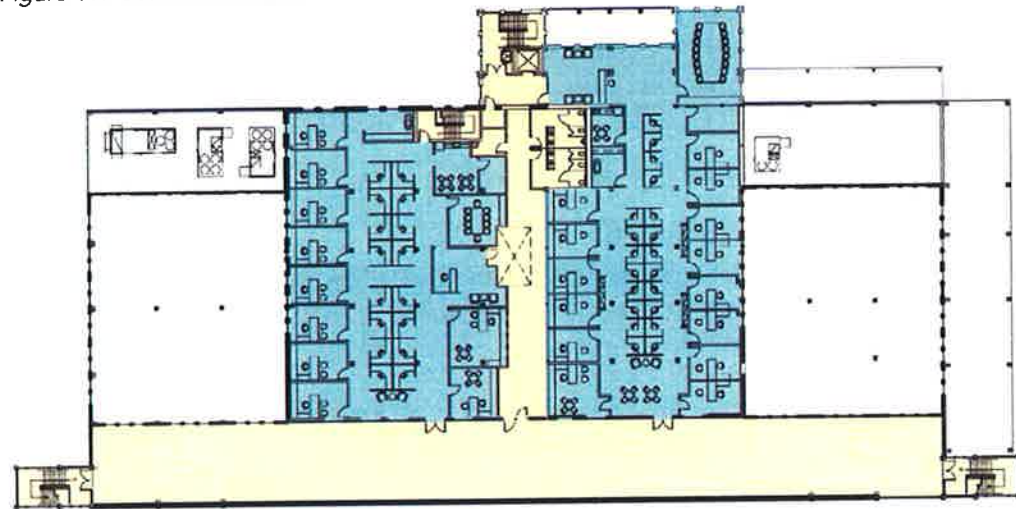


Figure 20. Scenario A Second Floor

Scenario A square footage

Natural Resource Center	24,800 sf
Restaurant / Retail	2,500 sf
Office Suite One	5,900 sf
Office Suite Two	6,400 sf

Scenario B

This scenario places the Natural Resource Center on both the first floor and the second floor. A larger restaurant area is shown on the first floor at the North end. One typical office suite is shown on the second floor.

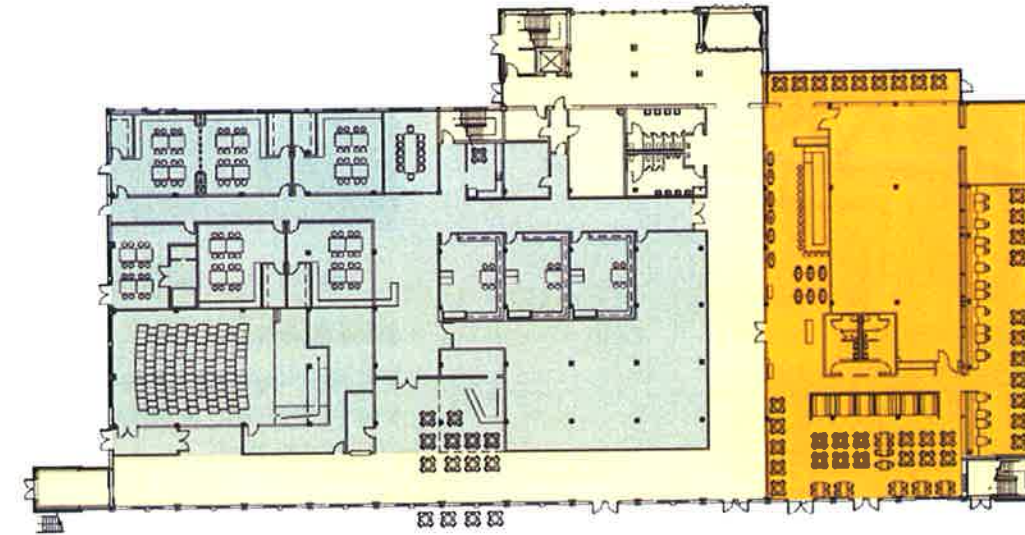


Figure 21. Scenario B First Floor

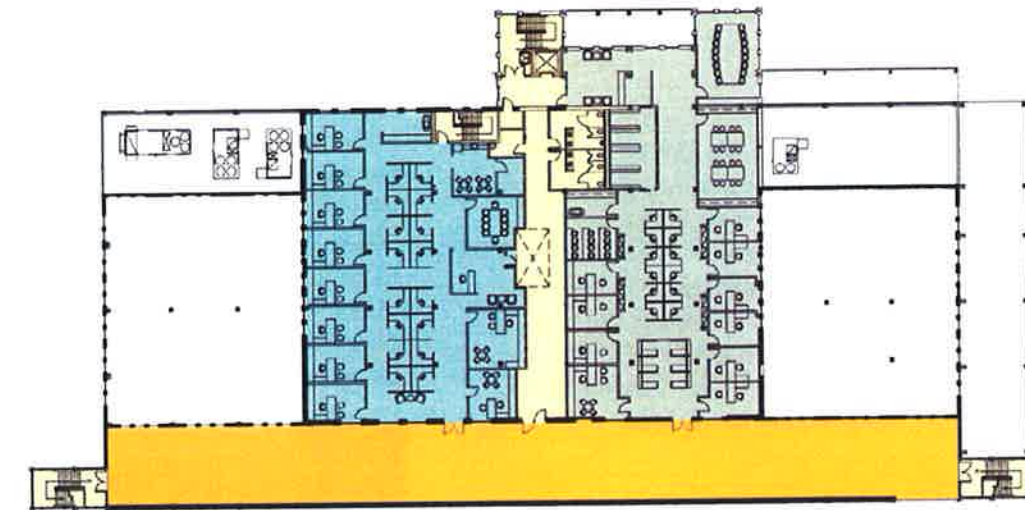


Figure 22. Scenario B Second Floor

Scenario B square footage

Natural Resource Center	23,700 sf
	(17,300sf on 1 + 6,400sf on 2)
Restaurant / Retail	10,000 sf
Office Suite One	5,900 sf

Scenario C

This scenario places the Natural Resource Center on both the first floor and the second floor, in a different arrangement than in Scenario B. A large restaurant is shown on the first floor at the south. One typical office suite is shown on the second floor. The second floor of Scenario C is identical to the second floor of Scenario B.

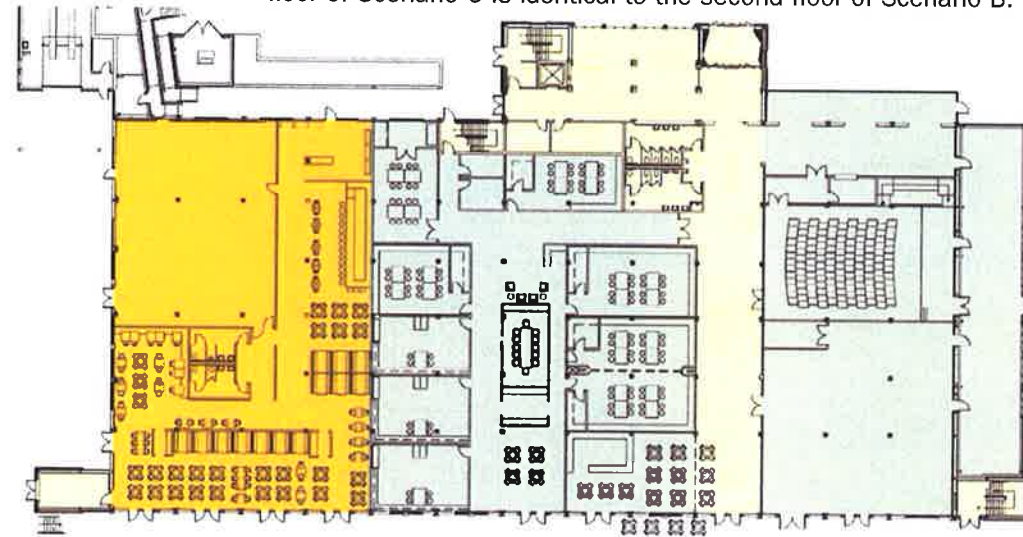


Figure 23. Scenario C First Floor

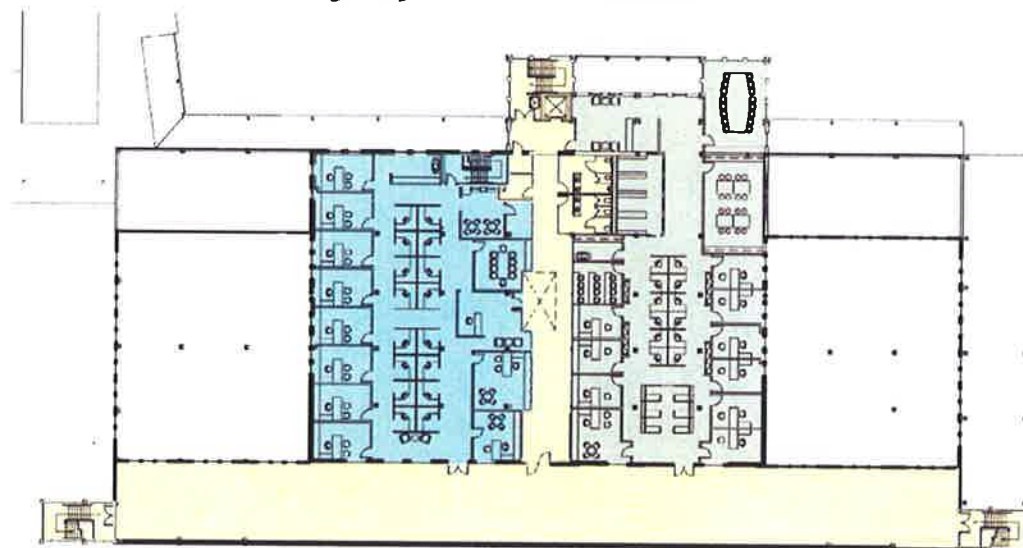


Figure 24. Scenario C Second Floor

Scenario C square footage

Natural Resource Center	26,900 sf
	(20,500sf on 1 + 6,400sf on 2)
Restaurant / Retail	9,600 sf
Office Suite One	5,900 sf

Scenario D

(not illustrated)

This scenario does not have the Natural Resource Center as part of the program mix. Instead the program is residential. This would be R-2 Residential according to the International Building Code 2003 (IBC2003). This building could be ideal for loft type residential units due to the large floor plate and tall ceiling heights on the first floor. Due to the deep floor plate, the building is not conducive to smaller units. The loft units would, for daylight reasons, need to have at least one end on the exterior. There could be 12 units on the first floor and 7 units on the second floor ranging from 1,500 square feet to 3,000 square feet each. A residential use in the building would require a complete redesign of mechanical, plumbing and electrical systems. It would also require a high degree of acoustical separation between the units which will affect cost.

Conclusions

Scenario Similarities

Scenario A, B and C layouts keep a main public corridor running from the main entry to the river terrace both on the first floor and on the second floor. This allows public access to the river through the building and allows natural light to filter further into the deep floor plate.

The second floor layout in scenarios A and C shows two office suites. Additional toilets will be required; toilets are shown as part of the layout in the larger restaurant areas.

The auditorium component of the NRC is shown within a high ceiling area of the first floor – scenario 'A' and 'B' are identical in locating it on the west, scenario C shows it located toward the east. In all scenarios the intent is to make the most of the views and the access to the river, especially for the 'public.'

Scenarios Differences and Highlights

Scenario A

- Scenario 'A' allows for more leasable office space on the second floor, given that the NRC is all on the first floor. However, this leaves much less space for a restaurant on the first floor.
- NRC is shown to take approximately 2,000 square feet more than as shown in scenarios 'B' or 'C'.
- The auditorium, the café and the interpretive center for the NRC have entry and break-out areas that are adjacent to the river terrace and could open to the terrace for additional space and allows for great views and seating along the river. The NRC would have a very strong presence along the river and in the building.

Scenario B

- Scenario B is similar to A on the west side. The east side shows a restaurant that has direct access to the entry as well as the river terrace.
- The leasable office area is reduced in this layout because the NRC has their offices on the second floor.

Scenario C

- Scenario C shows similar uses as B for the building. However, C shows the restaurant on the west side of the first floor. This allows the restaurant to have a distinct entry from the main / NRC entry.
- The interpretive center of the NRC is located on the east corner looking out to the river and out towards the lake – excellent views.
- The leasable office area is reduced in this layout, like B, because the NRC has their offices on the second floor.
- The NRC has a strong presence in the building while also allowing another use, such as the restaurant to have a separate presence. These two uses are separated more than in the other two scenarios.
- The Natural Resource Center is moving forward with a design for their space within the building

Scenario D

- Scenario D, residential, would require substantial changes to the building as well as a zoning change to Residential from Business.
- It is potentially the most expensive construction cost scenario.
- Would create large loft units.

Note: The SUNY Brockport Natural Resource Center of Lake Ontario is furthering their study into the use of the building for their purposes based on Scenario B.

Appendix I

Traffic and Parking Analysis

DRAFT

To obtain a preliminary understanding of the potential traffic impacts and parking needs of the Port of Rochester, the project's development program was assessed in two ways:

- **Traffic Generation and Distribution.** An estimate was made of the number of vehicular trips that would be generated to or from (entering or leaving) the study area, during the AM peak hour, the PM peak hour, and on a daily basis. A preliminary assessment of the distribution of those trips on the streets within the study area was also performed.
- **Parking need.** An estimate was made of the number of parking spaces that would be needed to serve the various land uses within the study area, on an hourly basis during a typical weekday.

The standard resource for the projection of vehicular traffic volumes, as a function of given quantities of certain land uses, is the Institute of Transportation Engineers' *Trip Generation* manual.¹ For parking need, an analogous resource is the ITE's *Parking Generation* manual.² The *Trip Generation* and *Parking Generation* manuals are based on surveys taken at sites around the country over the past decades, with land uses categorized using code numbers. In most cases, the surveys were taken at post-World War II developments. These are characterized by single-use zoning, orientation toward automobiles and relatively large scale. Both because such developments are the most typical in areas of new construction, and because they best lend themselves to the data collection on which the manuals are based, the rates in the manuals reflect suburban rather than new-urbanist patterns of land use and design.

This bias affects the accuracy of the manuals in predicting the trip generation and parking generation potential of developments such as is contemplated at the Port of Rochester, in that the manuals take no or very little account of the possibility of accessing individual development sites by any mode other than

private automobile. In the present case, however, it is anticipated that the mix of land uses within a small area – including housing, retail, work sites and recreation – will result in a much less auto-dependent population, with a considerable portion of all trips made on foot. This will be especially true of the restaurant and retail uses, whose customer base will be primarily those living and/or working within the immediate vicinity.

Consequently, it is appropriate to modify the trip and parking generation rates given in the manuals. By how much they should be modified is a subject for a detailed traffic study. For purposes of this master plan, a set of assumptions was made that is consistent with the parking program of the development. The implications of these assumptions, in terms of the proportion of all trips that will be made by private auto, are spelled out below.

Trip Generation

The *Trip Generation* manual provides average rates of vehicular trips generated, in terms of trips (in and out) versus gross floor area (KGSF), dwelling units (DU) or other relevant factors (including, for marinas, boat slips).

Table 1 shows the potential vehicular traffic volumes generated by the development program within the study area. The numbers in bold text are those that have been modified from the trips/unit rates given in *Trip Generation*. They represent the following assumptions:

- Convenience: 25% of ITE
- Restaurant: 50% of ITE

	No.	Units	LUC*	AM					PM					Weekday Trips/Unit	Weekday Trips
				Peak Hr. Trips/Unit	Trips	% out	Trips In	Trips Out	Peak Hr. Trips/Unit	Trips	% out	Trips In	Trips Out		
Residential:	395	du													
Townhouse Units	147	du	230	0.44	65	83%	11	54	0.52	76	33%	51	25	5.86	861
Apartment Units	248	du	221	0.46	114	83%	19	95	0.58	144	33%	96	47	6.59	1,634
Retail:	79.6	ksf													
GAFO (Specialty Retail)	15.036	ksf	814*	2.71	41	56%	18	23	2.71	41	56%	18	23	44.32	666
Convenience (15-16 hrs)	24.764	ksf	852**	7.76	192	50%	96	96	8.64	214	51%	105	109	184.50	4,569
Restaurant	39.8	ksf	931***	0.405	16	50%	8	8	3.75	149	33%	100	49	44.98	1,790
Office:	5.9	ksf	710	1.55	9	12%	8	1	1.49	9	83%	1	7	11.01	65
SUNY	26.9	ksf	760	1.24	33	17%	28	6	1.08	29	85%	4	25	8.11	218
Marina:	99	slips	420	0.08	8	67%	3	5	0.19	19	40%	11	8	2.96	293
Total Trips:					478		191	287		681		387	293		10,097

Table 1. Trip Generation

* ITE Land Use Code

** AM peak of Adjacent Traffic not available; use PM

*** Weekday not available; use 24-hour Convenience Store (LUC851)

**** AM Directional Distribution not available; use 50%

Trip Distribution

The trip generation projections described above were used as the basis for an estimate of the traffic capacity requirements of the Port of Rochester's internal street system. To do this, the vehicular trips generated by the development program were assigned to the roadway network. Trip assignments were made by reference to the location of parking facilities, and the general assumption that 15% of site-generated traffic will be oriented to the west on Beach Avenue and 85% to the south on Lake Avenue. The figure on page A57 shows the volumes of traffic projected to be generated by the Port of Rochester development program in the weekday AM and PM peak hours.

The traffic projected by the development program, however, is not the only traffic that will use the streets. Lake Avenue and Beach Streets, as well as the side streets that feed onto them, currently exist and carry traffic of unknown volumes. In the summer, a significant portion of that traffic is destined for Ontario Beach Park, parking in existing surface lots on the site of the Port of Rochester development. As discussed below under Parking Need, given the parking program prescribed in the Master Plan, a large amount of parking – on the order of 600 spaces in the mid-afternoon – will remain available for beachgoers and other users. Those drivers will also use the new streets within the Port site, as well as existing streets. However, insofar as beachgoers also shop or dine at the commercial establishments within the Port, their trips are represented by the projections shown in the figure on page A57 and so do not constitute additional traffic.

Therefore, although the figure on page A57 represents something less than the total volume of vehicles that will use the streets within and leading to the Port of Rochester, the turning movement volumes shown give a scale-of-magnitude indication of the traffic volumes that the Port's streets will carry. As such, they demonstrate that the streets as planned will have more than adequate capacity. Even at the busiest intersection within the Port development, all approaches function at level-of-service A in the PM peak hour under the site-generated volumes.

Parking Need

The proposed parking program is as follows. The 400 public garage spaces are intended for uses associated with off-site activities, such as the beach.

		Public		Reserved/ Residential	Totals
		on-site	off-site		
Structured	off-street	540	0	125	665
	on-street	46	80	541	667
Surface	on-street	154	150		304
Totals		970		666	1,636

Table 2. Parking Program

Parking need can be estimated using the ITE *Parking Generation* manual in much the same way as the *Trip Generation* manual is used to estimate vehicular traffic impacts. However, other factors come into play in determining parking need, that are not addressed in the *Parking Generation* manual, specifically:

- *Parking Generation* provides rates of Average Peak Period Parking Demand versus KGSF, DU, etc., much like *Trip Generation*. Parking demand is given as equivalent to parking occupancy. But a completely full parking facility would not provide adequate service, since drivers would have to search for the last available spaces. To ensure that there is a reasonable 'cushion' of empty spaces to allow every user to find one easily, the industry standard is to provide an extra ten percent over the peak occupancy. The same assumption is suitable for on-street spaces.
- If an area contains different land uses, whose peak daily activities occur at different times, it may be possible for those uses to share parking between them. For example, restaurants whose business peaks in the

evenings may be able to use parking that, during the daytime, is occupied by office workers. A well-thought-out strategy of shared parking can reduce the need for construction of spaces.

The Urban Land Institute's *Shared Parking* manual³ provides estimates of how the parking demand generated by a variety of major land uses fluctuates by hour throughout a typical day. These estimates, in terms of percentage of peak demand, can be applied to the ITE *Parking Generation* manual's parking occupancy rates (factored up by ten percent to provide a cushion of unoccupied spaces), and the parking needs of the various land uses can be compared on an hour-by hour basis to identify opportunities for sharing of parking between uses.

In the Port of Rochester, residential parking spaces will not be shared, but rather will be solely for the use of residents. Therefore, the spaces subject to potential sharing are only the 970 public spaces.

Tables 3, 4 and 5 show the calculation of total parking need for non-residential uses in the study area, taking into account shared parking opportunities as well as the likelihood that a much smaller number of restaurant and convenience store patrons will drive than is indicated by the ITE manuals. Table 3 shows the basic parking generation calculation for each land use in isolation, based on ITE rates.

Use	GAFO	Convenience	Restaurant	Office	SUNY	Marina
LUC	820*	851**	931	701***	701***	420
Category	Retail	Retail	Restaurant	Office	R&D	Marina
#	15,036	24,764	39,800	5,900	26,900	99
Units	ksf	ksf	ksf	ksf	ksf	slips
Spaces/ unit (ITE)	2.65	3.40	15.40	2.40	2.40	0.27
+10%	2.92	3.74	16.94	2.64	2.64	0.30
Spaces	30	64	463	16	71	29

Table 3. Parking Need by Land Use, per ITE

- * No rate given for 814
- ** No rate given for 852
- *** Office/R&D rates combined

Tables 4 and 5 show the factoring of these projected parking needs to account both for hourly fluctuation and for the degree to which the Port's mixed-use program may reduce the percentage of restaurant and convenience-retail patrons who drive. In Table 6, the same assumptions as were used in the traffic analysis are applied: that 25% of convenience and 50% of restaurant patrons will drive, compared to ITE rates. In Table 4, the percentage of restaurant patrons who will drive at lunchtime is further reduced, by ten percent in comparison with the factors given by the Urban Land Institute, as indicated in bold text.

	GAFO	Convenience	Restaurant	Office	SUNY	Marina*
6:00 AM	0%	0%	0%	3%	3%	50%
7:00 AM	8%	8%	2%	20%	20%	50%
8:00 AM	18%	18%	5%	63%	63%	50%
9:00 AM	42%	42%	10%	93%	93%	75%
10:00 AM	68%	68%	20%	100%	100%	75%
11:00 AM	87%	87%	30%	100%	100%	75%
12:00 PM	97%	97%	50%	90%	90%	100%
1:00 PM	100%	100%	60%	90%	90%	100%
2:00 PM	97%	97%	50%	97%	97%	100%
3:00 PM	95%	95%	50%	93%	93%	75%
4:00 PM	87%	87%	50%	77%	77%	75%
5:00 PM	79%	79%	70%	47%	47%	75%
6:00 PM	82%	82%	90%	23%	23%	75%
7:00 PM	89%	89%	100%	7%	7%	75%
8:00 PM	87%	87%	100%	7%	7%	25%
9:00 PM	61%	61%	100%	3%	3%	25%
10:00 PM	32%	32%	90%	3%	3%	25%
11:00 PM	13%	13%	70%	0%	0%	0%
12:00 AM	0%	0%	50%	0%	0%	0%

* Estimated

Table 4. Parking Occupancy as a Percent of Peak, by Hour
(Factors as given in ULI, Exhibit 28, except as noted)

	GAFO	Convenience	Restaurant	Office	SUNY	Marina	Total
Daily Spaces	44	23	337	16	71	29	520
6:00 AM	-	-	-	0	2	15	17
7:00 AM	4	2	7	3	14	15	44
8:00 AM	8	4	17	10	45	15	98
9:00 AM	18	10	34	14	66	22	164
10:00 AM	30	16	67	16	71	22	222
11:00 AM	38	20	101	16	71	22	268
12:00 PM	43	22	169	14	64	29	341
1:00 PM	44	23	202	14	64	29	377
2:00 PM	43	22	169	15	69	29	347
3:00 PM	42	22	169	14	66	22	335
4:00 PM	38	20	169	12	55	22	316
5:00 PM	35	18	236	7	33	22	352
6:00 PM	36	19	303	4	16	22	400
7:00 PM	39	21	337	1	5	22	425
8:00 PM	38	20	337	1	5	7	409
9:00 PM	27	14	337	0	2	7	388
10:00 PM	14	7	303	0	2	7	335
11:00 PM	6	3	236	-	-	-	245
12:00 AM	-	-	169	-	-	-	169

Table 5. Parking Need by Hour and Use: Shared Parking Potential

As Table 5 shows, the development program – particularly the restaurants - will generate parking needs that peak during the mid-day and evening hours. Under the assumptions identified, there will be a shared parking need for all non-residential uses of approximately 375 spaces at 1:00 PM, and 425 at 7:00 PM. Thus the total available public parking supply of 970 will be more than adequate to meet the demand generated by the development program. During the mid-afternoon, when less than 350 spaces are occupied by customers, visitors and employees to the commercial and SUNY sites, over 600 spaces will be available for use by beachgoers and others.

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Appendix J

Public Process and Input

DRAFT

As a component of preparing the master plan and recommendations, the design team conducted a series of public meetings to elicit input about the site, community, and proposals for the development. Meetings were held at the following places and times:

November 17, 2005 - Public Stakeholder Meeting, 7:00 pm, Port of Rochester Terminal Building

December 15, 2005 - Public Stakeholder Meeting, 7:00 pm, Roger Robach Center

February 23, 2006 - Public Stakeholder Meeting, 7:00 pm, Port of Rochester Terminal Building

April 26, 2006 - Public Stakeholder Meeting, 7:00 pm, Charlotte High School

July 17, 2006 - Final Master Plan Presentation, 7:00 pm, Roger Robach Center

In addition to these public review meetings, the planning and design team created a project website. The project website was used as a tool to communicate with the public through the seven month duration of the project. Milestone project progress information was uploaded onto the project web site and continuous public feedback was received for the duration of the master planning process.



Public Participation

project name Port of Rochester Master Plan project # 54426.00
 meeting date November 17, 2005 time 4:00 pm
 location Ferry Terminal Building
 recorded by Lauren Sichta/ Tom Doolittle
 distribution
 purpose Public Stakeholders Meeting #1

ATTENDEES

Michele Lobigan	CCA - President
Jane Wood	CCA - Charlotte Beautification Committee
Jim Wood	CCA - NBN
Glenn Gardner	CCA - NBN, OBPPC, Bay Ferries
Tom Borrelli	CCA, Charlotte Village & Transportation Museum
Virginia Anne Kobylaz for Bob Stevenson - City Council	CCA, NBN, Charlotte Village & Transportation Museum
Nancy Owens	CCA - NBA
Dee Mastro	CCA
Kathy Groves	SUNY College @ Brockport
Lou Spiro	SUNY College @ Brockport
Peter Eaves	Shumway Marine
Ronnie Cacia	HMA
Judy Hills	HMA
Bill B	HMA
Marie Poinan	Sector 1, Harbor Merchants Association
Carolyn Rapp	OBPPC - Village & Transportation
Bob Whiting	Harbormaster - City of Rochester
Mike Conniff	City of Rochester - NET
Rick Palumbo	LDR Char-Pit
John LoBiondo	Mr. Dominic's
Terry Testa	Pelican
Brian Labigan	Charlotte Youth Athletic Association
Ed McKeown	NYS Senate Joseph E. Robach (585-225-3650)
Thomas D. Braman, Sr.	California Rollin II
Thomas D. Braman, Jr.	California Rollin II
Alan Accorso	Jam's Nutty Bavarian
Shawn Bauer	Cheeburger Cheeburger
Kurt Ritchie	HSHI Scuttlebutts
Varoujan Hagopian	Sasaki Associates, Inc.
Thomas Doolittle	Sasaki Associates, Inc.
Lauren Sichta	Sasaki Associates, Inc.
Tom Riley	Charlotte Community Development Corp.
Chris Franco	Charlotte-Genessee Lighthouse
Linda Taylor	Charlotte-Genessee Lighthouse
Linda Stango	
Kathy McManus	
Joel Smith	

The Sasaki Design Team attended the first work session with the Stakeholders of Charlotte community at the Ferry terminal building. The purpose of the meeting was to get to know the community and to begin the process of direct interaction in the effort of preparing a comprehensive Master Plan.

The meeting begun by Linda Stango, the host, welcoming everyone and briefly introducing the consultant team to the attendees.

Meeting attendance signup sheet was circulated for the record.

Sasaki presented the project Web page and described its intent. The Project web page will be primary tool to communicate with the community at large. Also, it will be used to follow the general progress of the work. The design team will manage the site and will upload all latest project relevant information on a regular basis. Questions, suggestions or any project related issues can be communicated with the design team through this site. The design team will review all communications received through this site and will respond appropriately.

The design team solicited input from the community as to what are the important issues that we need to consider as we embark on developing a Master Plan. The following represent issues and input received from the community during the meeting.

SUMMARY

- Senator Robak's office is here to help and would like to be invited to attend all meetings
- History of the site, see Linda Taylor, Charlotte Genessee Lighthouse
- There is a walking tour of the area, it is suggested that Sasaki take the tour
- Charlotte branch library has many photos of the site that might be helpful
- Neighbors building neighborhoods (NBN) have done a lot of work in this area, can be used as a resource
- Charlotte community association member: like to see primarily as a residential community, development must be compatible with residential use, there have been past problems with nightclubs, the community likes some retail and restaurants
- Is gambling a possibility? There are mixed reviews of whether community likes the idea, currently gambling is not legal on land in NY, maybe video terminals on the boat down the road
- We need to draw people in, this site is at the 'end of the line' at the lake, need to draw attention to its location

- Does the team have a perception of how much money the new development will bring in and what percent will benefit residents/ non residents?
- How does the problem of transportation fit into our project?
 - o Sasaki to meet with transportation study group at next visit
 - o Trolley (is it financially feasible?), tourist benefit and transportation benefit for local residents
 - o There is a concern about the summertime bottle neck at Lake Avenue bridge particularly during peak summer weekend use; will it get worse once the development comes?
- Successful models of waterfront redevelopment:
 - o Baltimore Inner Harbor
 - o Cleveland Waterfront
 - o Toronto Waterfront, upscale housing and shops (smaller scale)
 - o Kingston, Ontario- smaller, major developments right now, interesting things with tourist development
- There needs to be a smooth transition with new development and existing community, the community does not want to be able to see the new versus the old area (architectural compatibility)
- Charlotte is an active community based on volunteers
- Charlotte Community Board is the oldest in the city and made up of volunteer
- It is suggested that Sasaki also talk to the Harbor Merchants
- There is a Charlotte newsletter, they will mention the website and would like to have periodic input from Sasaki
- Concern about people who may not have internet access. Can Sasaki create a leave behind material for their use?
- The Cat is the 3rd ferry service in this area
- The ferry is only the icing on the cake, what happens if there is no ferry?
- This area grows from 50 to 100,00 during festivals
- Architectural history- all periods
- How will they build it and where will the money come from?
- The new development needs to respect the history of the area while moving into the future
- Maybe create a village with historic theme
- Unique opportunity to create a pedestrian friendly environment, families walking around
- Presence of school and churches, churches have prominence in the community, history
- 'Village within a city' unique, tight, proud, everyone knows everyone
- Create a new village with a historic theme
 - o New urbanism
 - o Pedestrian friendly
 - o Mixed use
- The Charlotte Community meets the first Monday of each month
- There are height restrictions to protect views to the water
- The community has concerns about parking structures, would prefer below grade garage and not above ground
- The city and the community worked together to write the building codes for 3 stories
- Recreational boating- need to make sure the plan does not exclude summer recreational boaters, make sure it isn't too expensive for local residents to enjoy

- Seasonal use of recreational facilities
 - o Ball fields
 - o Volleyball leagues
- Sasaki needs to receive economic development plan from the City
- Incorporate families and children from surrounding towns into the area. 90% of kids that attend the local high school are bused in
- Lake Research Center would be for Elementary, High School and College age students
- It would be nice to have a tall ship of some sort in the marina, sailing school or museum, this is a maritime community, the ship could also be for education/ research
- Great Lakes maritime community- salmon, bass, zebra mussels
-

The information above will stand as recorded unless Sasaki receives written comments within five days of the distribution date from a recipient requesting an amendment.

PUBLIC MEETING MINUTES - DECEMBER 15, 2005

project name	Port of Rochester Master Plan	project #	54426.00
meeting date	December 15, 2005	time	7:00 pm
location	Roger Robach Center, Charlotte Rochester		
recorded by	Lauren Sichta, Alistair McIntosh, Varoujan Hagopian		
distribution	All interested, through the project web site		
purpose	Community Meeting		

The City of Rochester project coordination and overview committee hosted a public workshop at the project site, Roger Robach Center to establish a dialogue and to solicit ideas from the community. Unfortunately the weather was stormy and the attendance understandably was less than expected. Nevertheless, a fair number of folk participated in the meeting and the dialogue was very helpful to the Sasaki design team.

ATTENDEES

Krestia DeGeorge	
Dennis Micheals	
Teresa Robach	
Joe Robach	
Patricia Kryzalka	
Joe Carrozzi	
Stephen Engle	
Gary Isaacs	
Miles Bliss/Fred Karshich	Rochester Yacht Club
Marie Poinan	C/CA/Harbor Merchants
Tom Brewer	
Mike Parker	
Tom Riley	
Matt Ingalls	
Steve Gibbs	
Rick & Sue Brennan	
Gene Gartland	
Alan Oberst	
Virginia Anne Kobylarz	

SUMMARY

Kathy McManus opened the work session by introducing the Sasaki design team, stating the purpose of the meeting and turning the meeting over to Varoujan. Sasaki, commenced the meeting by reviewing the project web site and describing its purpose as a communication tool to exchange ideas and input with the team and to remain abreast of the progress of the work.

The design team presented its findings of the project site analysis with the aid of visuals, prepared to stimulate discussion and the exchange of ideas. Upon concluding the presentation, the meeting moderators, Varoujan and Alistair, opened the meeting for general discussion. The following is a summary of the key issues discussed.

Examples to follow or to investigate of successful waterfronts:

- Kingston / Canada- Confederation Basin, access from the lake
- Cobourg
- Toronto
- Portland, Maine- ferry that goes to permanent islands

Community:

- Varying types of residential homes that will appeal to empty nesters and young urban dwellers
- Diversified living options for the growing technological work force in the region
- A special place to live
- A center of education and research
- Different housing stock that is not available in Rochester

Transit:

- Shuttle bus service to multiple destinations
- City is conducting a comprehensive transportation and parking study for the area
- Use of the rail corridor for transit from Charlotte to Downtown if and when the RR stops using the existing rail line. Some speculation was voiced about the future of the power station. As of yet, it is unclear if the station will remain in operation for the foreseeable future. Should the power station shut down, there will be no need to commence freight train service, and the rail line ROW can be utilized for other uses

Attractions:

- World class sailing on the lake
- The Genesee River should be celebrated for its unique natural attraction. Interesting geological makeup, including water falls and other interesting amenities can make it a worth while attraction for visitors
- Business/ conference center/ hotel in an attractive setting on the river / lake
- Building something in the lake- housing/ hotel/ marina
- Winter fest - on Super Bowl Sunday - lakeside winter celebration is an annual event that the community holds. It is an annual successful winter event that draws lots of people to the area
- History- underground railroad, war of 1812
- Need more parking. During summer events all available parking spaces are used including satellite spaces off site

- Should look into creating 12 month a year attraction
- A lighthouse as an attraction
- Museums, Charlotte Village Museum
- The River and the Village- year round programs
- Birding / Natural history
- Geologic and Lake History tours
- Research Center
- A viewing tower (5-10 story high)
- Railroad bridge as a restaurant
- Pedestrian tubes under the river, inverse aquarium to get to the swing bridge
- Indian heritage
- Falls on the Genesee River
- Business conference center- see Buffalo, NY
- 100 mile radius population numbers, show the US census information as well as Canadian numbers
- Could create a shuttle system using the empty Kodak lots for parking, possible shared/ structured parking
- Charlotte Village and transportation museum exists
- Village started in 1792
- People do use the area in the winter, birding
- This area needs mixed use residential, research/ education to attract young professionals and there is a lack of creative housing
- Kingston has a University component, shops, orchestra, arts and cultural center and art exhibits
- Tie uses together, use existing restaurant area, mixed use, possibly use the ferry terminal for video gaming in the winter
- A marina on site is needed to meet existing strong boating demand
- Currently the west pier is underutilized

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PUBLIC MEETING MINUTES - FEBRUARY 23, 2006

project name Port of Rochester Master Plan project # 54426.00
meeting date February 23, 2006 time 6:30 PM
location Port of Rochester Departure Hall
recorded by Varoujan Hagopian, PE
distribution All attendees via the project web site
purpose Public Presentation of Market Analysis and Initial Site Framework Concepts

- Reuse of the Ferry terminal building should not be for offices. Keep it for ferry service.
- Study connections to the entire river as a resource for the area.
- We could use an Olympic size swimming pool.
- Transient docking is required for short stay.
- Build high rise tower to maximize the views and bring value.
- Need a dynamic maritime village.
- No research use should be allowed in the buildings.
- Make connections to larger trail systems within the city.
- New use for the ferry.
- Fiscal issues of selling public lands.

Kathy McManus opened the session and thanked all attendees for their willingness to participate. A reasonable estimate placed the number of attendees at around 150 people from the Charlotte community as well as the greater Rochester area.

The information above will stand as recorded unless Sasaki receives written comments within five days of the distribution date from a recipient requesting an amendment.

The presentation commenced by Varoujan briefly describing the intent of the meeting, where we are in terms of the overall effort and what we intend on achieving in this meeting. Varoujan explained carefully that the plans presented this evening do not constitute decisions but are a general framework of opportunities for the site, including site access and circulation, building massing, general uses, site organization, definition of public open spaces and a marina. Once we proceed beyond this point and begin honing in on a single preferred alternative, the process of establishing design intent, architectural character and urban design organization will commence.

Sarah Woodworth presented the market analysis findings, followed by Alistair McIntosh describing the three concept alternative frameworks.

Following the presentations, the following questions / discussions were recorded:

- Where is access to parking for beach users?
- Shuttle service from and to remote lots.
- Proposed options are too dense. Not enough open space. Provide more green space.
- Can we maintain good water quality in the proposed Marina?
- What is the land coverage, floor area ratio?
- How do we control developers so they will follow the Master Plan?
- What % of the boat slips will be dedicated to condominiums?
- Expand the existing park. Make the entire area a park.
- Consider providing canal networks like Venice.
- Retail (fun?) along the waterfront.
- What will bring people here?
- There is no destination, no need for residential.
- Maintain site lines to lake, river and the lighthouse.

PUBLIC MEETING MINUTES - FEBRUARY 24, 2006

project name Port of Rochester Master Plan project # 54426.00
 meeting date February 24, 2006
 recorded by Varoujan Hagopian, PE
 purpose Meeting with Developer Group

has to be done by public funds. One of the basins can be private. There is a City county land agreement regarding replacement of park parking with a marina. 1.3 to 2 acres. A smaller marina basin in the north can cost about \$5 million. A good town or village center west of the Port Terminal building can be a good thing.

- Building the proposed residential or hotel building in the northeast corner of the site will be very expensive. The bedrock at that location drops sharply; hence foundation work will be expensive. Try to establish a pedestrian connection between the river edge and the Train station to the south.

February 24, 2006

10:00 AM meeting with developer group, Port of Rochester conference room

In a similar fashion to previous day presentations, the Sasaki Design Team briefed the attendees on the progress of the project and opened the session to general discussion.

- How will growth occur when there is not positive migration from outside of the region? Sarah stated that her study assumes a certain amount of internal churn, as the community looks into new product not currently available.
- How deep is the local market and what the capture rate for this project is? Sarah, responded by saying the study is conservative in its forecast.
- 40 year condo market is very flat with virtually no appreciation. Single family townhouses have doubled in value. Parking assigned to the units needs to be under the residential flats. As long as the elevator goes to it directly, it will work.
- The issue of parking in relation to the units is more critical than addressing what to do with the Port Building. Do not rush into determining what to do with the building.
- What type of office space is being considering? Sarah: Class A & B. 2nd floor of this building is class B office space, approximately 30,000 sq.ft. Typical office space users range from 2000 to 5000 sq ft. Might find a special user who is looking to be in an exclusive space and has a need for 25 to 30,000 sq ft. Suggestions were made for us to consider the option of early retail introduction up front.
- Might look into a suite hotel with 450 sq ft units that can be converted to an assisted living if the hotel idea does not work.
- For a destination place within this project, must have a good quality indoor pool for it to succeed.
- If we are going to put restaurants below the residential units, the construction of the first floor has to be reinforced concrete.
- Proposing one large marina in the northern part of the site is going to be a challenging option. There are large utility lines that might come into conflict with the creation of the basin. We need to investigate the depth and location of the utilities. Hence, suggesting two small boat basins on south and north sides of the Port Terminal Building. Developers will not be interested in investing into the cost of constructing a marina. It

General discussion:

- Developers can not secure financing for the project if they can not get 12% rate of return on investment.
- The old RR bridge abutment south of the Port Terminal building will be taken out if a boat basin is considered. This tends to open up the views to the river. River Street connection is very important to the success of the project. The boat launch must be relocated.
- A generic SEQRA has been done with the State of NY. Future amendments need to be filed when the development project is defined further.

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PUBLIC MEETING MINUTES - APRIL 26 + 27, 2006

project name Port of Rochester Master Plan project # 54426.00

meeting date 26 and 27 April 2006

recorded by Tom Doolittle

purpose Developers Roundtable

SUMMARY

10:00 AM, Port of Rochester Terminal Building, Conference Room

The purpose of the meeting was to review the refined master plan with the developers group that had given input on the previous alternatives. T. Doolittle and V. Hagopian presented the PowerPoint presentation that had been given to the public the previous evening. The following issues were discussed:

- What is the schedule for the project? We are anticipating a 5-10 year build-out for the full development, dependent on market conditions.
- What is the competition, and will this site be able to compete with the housing currently under development downtown? The design team believes that this development will be reaching for a different audience than the downtown housing market, and therefore will not compete directly with those projects. Also, this development is proposed primarily as owner housing, where most of the residential developments in the downtown are rental.
- What kind of retail is anticipated? About half of the retail would be restaurants; the balance would be convenience retail to support residents of new development and existing neighborhood. The potential for bringing in larger-scale retail was discussed; the developers generally felt it would be too risky to establish and too expensive to maintain.
- The layout of the buildings on the site (with apartment buildings along the river) obscures the river from the view of the townhouses closer to Lake Avenue. Sasaki will look at the building heights with respect to the topography of the site and determine if adjustments need to be made to preserve/enhance these views.
- The development is currently targeted for the \$250-\$350k market – has a less dense, higher end approach been considered? The market analysis to date hasn't suggested that there is a sufficient market to support that cost per unit.
- There is a potential disconnect between the "beach crowd" and the potential residents and businesses of the development. The interface between these two groups will have to be addressed.

The information above will stand as recorded unless Sasaki receives written comments within five days of the distribution date from a recipient requesting an amendment.

PUBLIC MEETING MINUTES - APRIL 26 + 27, 2006

project name	Port of Rochester Master Plan	project #	54426.00
meeting date	26 and 27 April 2006	time	7:00 PM
location	Charlotte High School Auditorium		
recorded by	Tom Doolittle		
distribution	K. McManus, V. Hagopian, A. MacIntosh, L. Sichta, B. Arapi, File		
purpose	Review of Development Options for Presentation at Public Meeting 4/26		

The session was open to the general public. Approximately 100 people attended. T. Doolittle presented the refined plan and its components, and also described the studies of the LONRC. V. Hagopian led a question and answer session on the design and its components. Major questions asked and issues raised included:

- The interior courtyards within the townhouse blocks appear to be private space – will people from outside of the development feel comfortable walking into these spaces? Sasaki responded that the intent was for these to be part of the overall public space of the project; they will evaluate further ways of encouraging public use.
- Will a homeowners association be established for the development? Sasaki indicated that the establishment of a homeowners association would be determined by the development mechanism and the demands of the market.
- The two apartment buildings north of the marina close in the development site and separate it from the beach; they also create a wall to the southern end of the park. Sasaki will look at options that remove these buildings.
- Is parking access adequate for beach users? Sasaki believes that there is adequate parking for summer weekday use, based on a parking study prepared for the area. On weekends, additional satellite parking may be required, similar to the existing conditions. The garage also locates beach users closer to the bath houses and the beach.
- The townhouse development along Lake Avenue will block the current open views to the river – can the streets be widened to expand views down them to the water? Sasaki will look at opportunities to increase visibility through the site to the river.
- Will a traffic assessment be done to gauge the impacts of this development? A traffic study will ultimately need to be done; the responsibility for preparing the study will depend on how the site is developed.
- The proposed plan eliminates all the existing ferry terminal parking. If a new ferry service is established, it will need new parking. Can the site be designed to accommodate this? If a ferry service returns to the site in the future, accommodations can be made for parking required. It is assumed that a future ferry service would be

passenger-only or carry a smaller number of vehicles, reducing the total surface area required to support vehicle operations and parking.

- There needs to be a stronger connection between the green space in the development and the Lake Ontario Beach Park. One building north of the marina should be removed to promote this connection. Sasaki will review the location of the buildings on the north side of the marina.
- Use of public transit should be promoted to reduce automobile use in the development. The City and the design team agrees.
- Will the garage on Estes Street take any houses? No – the garage is located on a city-owned parcel that is currently a surface parking lot.
- Will parking in the garage be free? That would need to be determined in the future.
- Will the structures get any taller than shown? No – the existing zoning and soils conditions will limit structure height to less than 4 to 5 stories.
- The architecture of the new development must relate to the community. Sasaki agrees, and will be developing some initial design guidelines for the development.
- Marinas are typically not open to the public anymore – people will not be allowed access to the docks. There will also have to be controls placed on arriving boats for customs – a facility for Homeland Security staff to monitor boats into and out of the harbor will be needed. Sasaki noted that there are many marinas operating on the Great Lakes and other locations where access to docks is fully open to the public. The homeland security situation will likely not be different than that for the marinas across the river.
- Will the Wednesday and Sunday concerts in the park be continued? How will parking and access be accommodated? The concerts should not be affected; parking will have to be accommodated in a similar fashion to summer weekend beach use with shuttles to remote lots. This system has worked well in the past.
- Transient boaters will need facilities – rest rooms, showers, laundry, etc. Where will this be accommodated? Sasaki will look at options for providing these services in one of the buildings adjacent to the marina.
- Who will be responsible for the maintenance of the parks and roadways in the new development? Will a special assessment be made to the property taxes within the development to pay for these services? The mechanism for maintenance of the development has not been determined yet. It is anticipated that it will most likely be provided by the City.
- During large storms, there is a surge that comes up the river that will affect the marina. Detailed engineering design following the master plan effort will develop the appropriate design.
- Will the money used to build the development be public or private? It has not been determined yet, but may be some of each. The building development will most likely be done entirely by private developers, while the infrastructure components may require City investment. Once the master plan is complete, an assessment of the most effective ways to finance the development will be prepared.
- In the Corn Hill development, the parking on the streets is controlled by permit – will this development be the same? No – the on-street parking will be for general use to support the retail, restaurant and offices uses on the site, as well as visitors to the marina and other attractions.

- The parking garage on Estes Street will block views of the lake for residents of Estes Street. Sasaki responded that the garage may have some impact on views down Estes Street, but the community center already blocks views down the street to the lake.
- Is there adequate parking for the LONRC, commercial and office uses proposed in the center of the development? Sasaki will confirm its assessment of the overall parking demand for the development; the parking provided in on-street spaces should be adequate for these uses.
- There is a county parks maintenance building existing on the site that will have to be relocated. Sasaki will look at options for this facility; it may ultimately land in a different location.
- There needs to be an attraction on the site that will draw families to the development in the winter. The market analysis that was prepared for the site did not suggest there was an economically viable attraction that could be developed on the site. The aquarium to be developed as a component of the LONRC will provide a smaller-scale attraction, as will the restaurants and retail provided within the overall development.

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PUBLIC MEETING MINUTES - JULY 17 - 19, 2006

project name Port of Rochester Master Plan project # 54426.00
meeting date July 17 - 19
recorded by Varoujan Hagopian
purpose Final Visit/ Public Presentation/ Meeting Minutes

SUMMARY

The Sasaki Planning and Design Team, represented by V. Hagopian, A. McIntosh & Sarah Woodward of ZHA attended a series of meetings including a final public presentation to present the progress of the work and the Final Master Plan Draft Report. The meetings took place Monday July 17th through Wednesday July 19th, 2006.

This Memorandum is a summary of all meetings and all key issues discussed.

Monday July 17th 2006. 2:00 PM meeting with City Project Staff.

Sasaki provided a brief overview of the progress of the work since the last meeting in June. With the aid of a power point presentation, Alistair presented the Final Draft Master Plan including cross sections and basic design guidelines. The following represents the summary points of the Plan:

- Town Houses and Apartments 374 units.
- Total retail space, 54,600 Sq. Ft.
- Office space, 6000 Sq. Ft.
- Parking for residential units, 639 spaces
- On street parking 250 spaces
- Existing parking on Lake Avenue and Park Drive 150 spaces
- Proposed structured parking 380, spaces.

Chuck Thomas was introduced to the Team as the new City Planner. Julio stated that the City / Mayor are committed to seeing the Port area get developed, and they will be very interested in the outcome of this week's events.

Following Alistair's presentation, Sarah presented the financial feasibility numbers. Her analysis indicated that a public / private partnership will be necessary to make this development feasible. Because the market in the Greater Rochester area is marginal, the development will generate a gap that needs to be funded by the City. She explained the potential of using Tax Increment Financing (TIF) to acquire the necessary funds over the 5 to 10 year proposed project implementation schedule. Robert Stevenson (City Council member) explained that State of NY

school district funding is set up differently compared to other states. Hence, the schools will have no say on the allocation / allocation of revenues generated from TIF.

V. Hagopian, presented the project overall estimated cost, including various scenarios of phasing. The planning team also stated that most likely the successful developer for this project would be a local entity and not a national development group.

Final Public Presentation, 7:00 PM @ the Roger Robach Community Center.

The planning Team made a final presentation to the community describing the changes the team made from previous sessions. The plan was revised and overall density of development was reduced based on feedback received from the community during previous presentations.

Following the presentation, the meeting was opened for a question and answer session.

The following represent key feedback issues heard from the community.

- Concern about the level of development density as it will block views to the river and the lake.
- Community was upset with losing free parking.
- Comments about need for more parking to accommodate the peak weekends and Wednesday evening concerts.
- Some had objections to the proposed above ground parking, as it will block views to the Lake.
- Some spoke about a need for development at the site. The community is dead during most of the year outside of summer weekends, hence would like to see more residents living in Charlotte.
- Bob Stevenson explained that courtesy shuttles are provided by the Community Special Events coordinators to the Public at very low cost during Wednesday summer evening events and the Harbor Fest. A similar system can be implemented to accommodate summer weekend use as exiting surface parking is reduced in the future.

Tuesday July 18th 8:15 AM meeting at City Hall with Senior Management Group.

The Sasaki Planning Team presented the same information to the City of Rochester Senior Management Team and reported on the events of the public meeting. The presentation was well received.

The proposal to consider creating a Tax Increment Finance (TIF) District generated some discussion, particularly about process and how one might proceed to accomplish the task.

10:00 AM meeting with Local Developer companies.

Five local developer companies were available at the meeting. This is a continuation of previous meetings to test the market, interest and get feedback from the attendees. The following is the input we received during the meeting:

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- Did the Team look into potential credits for developing Brownfield's to reduce the gap.
- Proposed density of housing is not dense enough. Suggest looking into 750 to 800 units.
- Current and foreseeable future market is more favorable towards apartments, multi family and condominium units, not town houses.
- Is the proposed street grid sacred or it can be changed?
- Who is / are the market we are targeting. Sarah explained, empty nesters, young professional couples and singles who are looking for new product and wants a new way of living. According to her research there is ample demand for this new product.
- What is the expected development schedule: 5 to 10 year for total build out
- How will the City advertise to proceed? Will it be for single or multiple developers? It could be either, more discussion is necessary to decide.
- Developers prefer a well defined process that outlines, schedule, funding etc. They do not want to get bogged down in a long approval process.
- Streamlined process will be more favorable.
- In the Developer RFP, would like to see clear commitment from the City that the Marina is going to be built.
- Need to look into west side of Lake Avenue as well.
- During the review and permitting process the City needs to open the public review process to the Greater Rochester community and not just Charlotte.
- City will take the lead in the NY State SEQRA process for the plan.
- Local Development community is very interested in the Port Development Plans.

Appendix K

Contributing and Prior Studies

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In preparing the Master Plan, the design team reviewed and considered the following prior studies, documents and analyses to inform the recommendations and the planning process:

Local Waterfront Revitalization Program (LWRP) Policies for the LWRP Harbor Area and the Port of Rochester

The Renaissance Plan - Campaign 8: Tourism Destination

Charlotte Visioning Workshop Report- Executive Summary

Sector 1 (Charlotte) NBN Plan

Bruckner Housing Market Study for Port of Rochester- Executive Summary

Lake Ontario Research Center- Schematic Design

Geotechnical Site Characterization – Port of Rochester Harbor Improvement and Harbor Ferry Terminal - Executive Summary; September 2000; prepared for LaBella Associates, PC by Haley and Aldrich of New York, Rochester, NY

Final Design Report/NEPA Environmental Assessment/SEQR Final Generic Environmental Impact Statement for Public Redevelopment, Focus Site No. 1 – Local Waterfront Revitalization Plan and Specific Projects City Project Code No. 99021- Summary; May 20, 2005; prepared by the City of Rochester

Market Study - Proposed Hotel, Rochester, NY; April 1999; prepared for the City of Rochester Department of Economic Development by Hospitality Consulting Services, Mineola, NY

Port of Rochester Environmental Management Plan; July 2005; prepared for the City Division of Environmental Quality by LaBella Associates, Rochester, NY

The Port of Rochester Development Preliminary Foundation Assessment; July 2005; prepared for The City of Rochester by Foundation Design, P.C., Rochester, NY

Habitat Restoration Feasibility Study for the Rochester Harbor (Draft 95% Submittal); September 2005; prepared for the Department of the Army, Buffalo District, Corps of Engineers by URS Corporation Group Consultants - Alternatives for mitigating seasonal accumulation of algae at Ontario Beach

Transportation Evaluation and Support Study Technical Report No. 1 – Port of Rochester (Draft); prepared for City of Rochester Bureau of Architecture and Engineering by Bergmann Associates, Rochester, NY

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