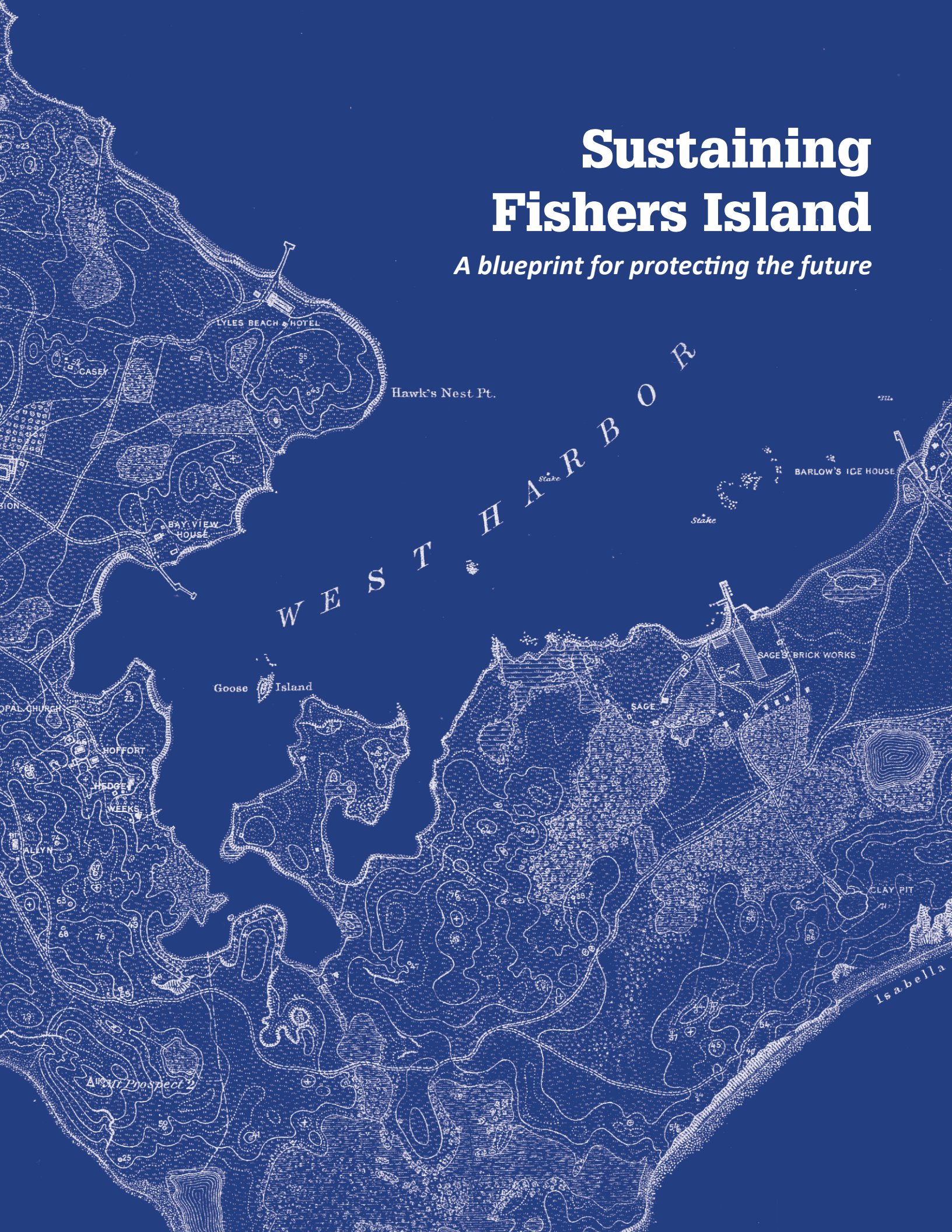


Sustaining Fishers Island

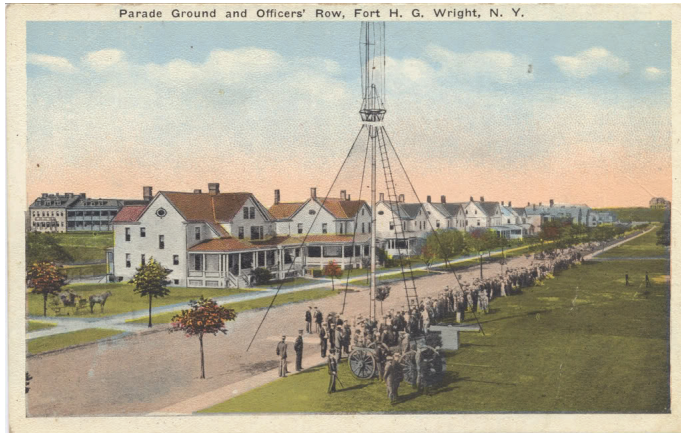
A blueprint for protecting the future



Sustaining Fishers Island

**A plan prepared by the
Yale Urban Design Workshop**
School of Architecture, Yale University
New Haven, Connecticut

March 2014



The Yale Urban Design Workshop is a community design center based at the Yale School of Architecture, providing urban design and planning assistance to communities in the region.

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On the cover: Partial 1882 map of Fishers Island prepared by the US Coast and Geodetic Survey (Source: National Oceanic and Atmospheric Administration, Historical Map & Chart Collection, historicalcharts.noaa.gov)

Above: Early 20th century postcard depicting "Parade Grounds and Officer's Row, Fort H.G. Wright" (Source: Collection of Matt Edwards, available at <http://cdsg.org/forums/viewtopic.php?t=127>)

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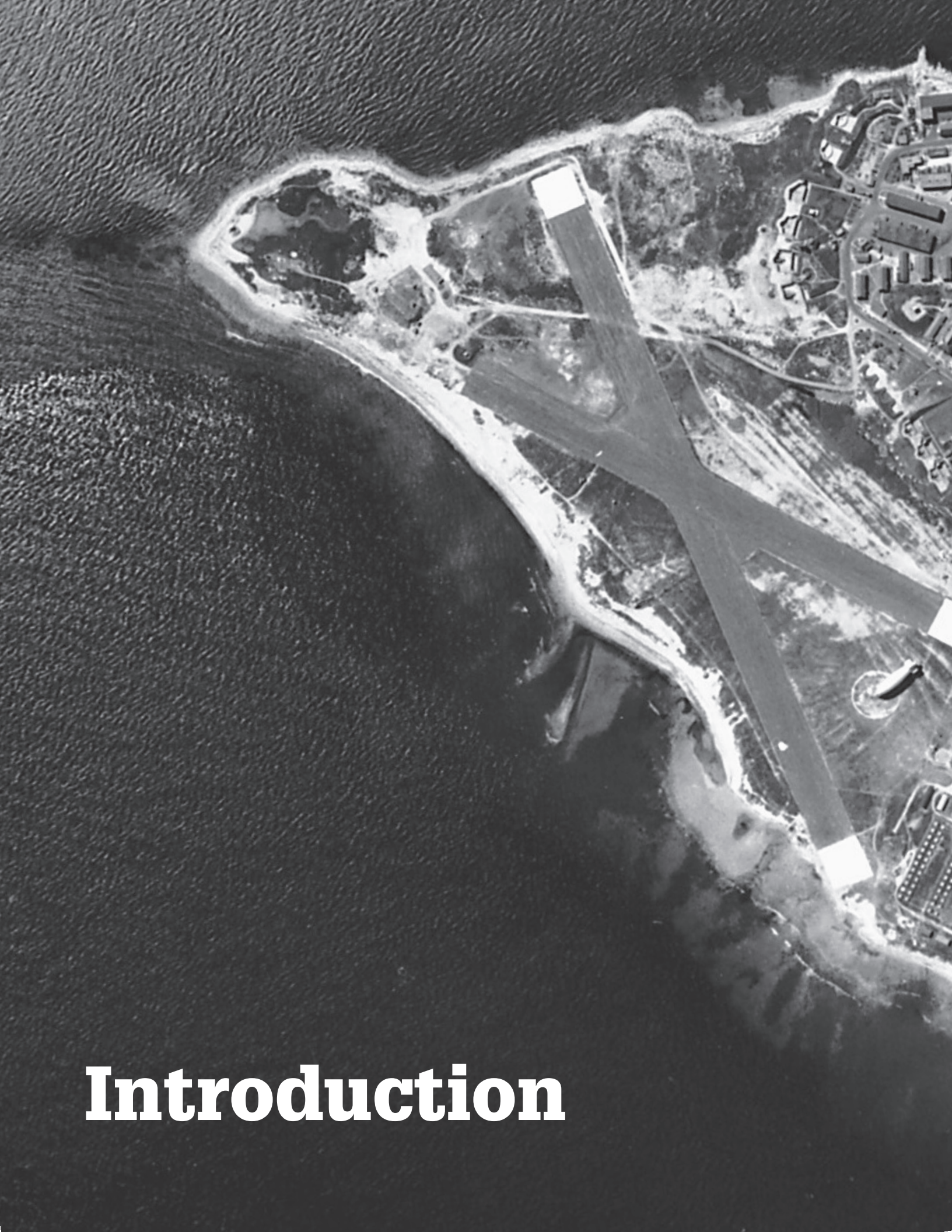
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Introduction



Introduction

This plan proposes three strategies for Fishers Island: incorporate as the Village of Fishers Island, develop the fort area as a pedestrian-oriented west end village center, and improve infrastructure.

Executive Summary

In January 2012, eight Fishers Islanders, including both summer people and year round residents, visited Yale University in New Haven to discuss some of the many present challenges and problems facing the Fishers Island community with faculty from the Schools of Architecture and Management. Among their most pressing concerns were the dwindling year round population of the Island (and a raft of social and economic effects further reductions might provoke) and the problems produced by lack of local, comprehensive management of the Island and remote governance, which has left the Island without the tools to address its needs and to plan for its future.

Since that meeting, the Yale Urban Design Workshop, a community design center affiliated with the Yale School of Architecture, in association with the Island Community Board (ICB), has worked with the Fishers Island community to conduct a public planning process on the Island, which included extensive interviews with Island residents, business people, institutional leaders, and officials, meetings with the ICB, and public forums open to all Islanders. During this process the YUDW cataloged needs and desires, flagged challenges and threats, and identified and discussed opportunities and strategies for positive change.

The most pressing challenge facing Fishers Island today is the continuing loss of its year round community – a community consisting of many with long-standing ties to the Island, who provide the critical capacity to keep the Island running, and who contribute to the Island's character as an authentic place. This community volunteers to be firefighters and emergency medical technicians, serves on the commissions that run the Ferry District, Waste District, Fire District, and School District. They manage and maintain the utility infrastructure on the Island, including water, power, and telecommunications. They run small service businesses and are stewards of the houses and landscapes of the Island's seasonal and summer residents. They are an important part of the character and quality of life on Fishers, and without them the Island would revert to nothing more than a private resort.



Since the 1940's, the year round population has declined from more than 600 to fewer than 250, changing Island life immensely. This decline has been brought about by a bevy of factors, including the high cost of housing, transportation, and utilities, lack of social opportunities, limited primary and secondary educational opportunities, and limited job diversity and opportunity. Further decline may irreparably the character of the Island.

The second major challenge facing the Island community, as it grapples with the future, is creating a system of local, accountable and autonomous management, capable of coordinating the roles of various Island institutions, which have historically operated in individual silos. To truly address stabilizing and, indeed, increasing the population of the Island, a new structure is required, capable of providing a framework that will attract and retain population, while controlling costs of basic services (the ferry and utilities), addressing deferred maintenance, increasing operational efficiencies, and negotiating the sometimes conflicting goals of various Island constituencies.

This report proposes three interlinked strategies to address population loss and Island management. The first is for the Island to incorporate as the Village of Fishers Island and establish an on-Island government with a professional staff capable of managing the Island's infrastructure, coordinating policy decisions, and recruiting and supporting year round residents. The second is supporting the needs of current and future year round residents through the establishment of a pedestrian friendly, transit oriented, west end village in the former fort area of the Island around the ferry landing, tying together modest new affordable housing, commercial space, the school, community center, and transit, with the spectacular Island landscape, and leveraging the nascent artists community developing in the area. The final strategy is to make targeted improvements to infrastructure most needed to support year round residency, but also benefitting all Islanders – improving ferry service, utilities, and telecommunications

infrastructure.

Though the recommendations of this report might be undertaken piecemeal, as other efforts on the Island have, it is the belief of the authors that without coordination, accountability and oversight of the kind offered by a small government, these changes will not produce the desired effect of stemming the out flowing population stream.

Principal Recommendations

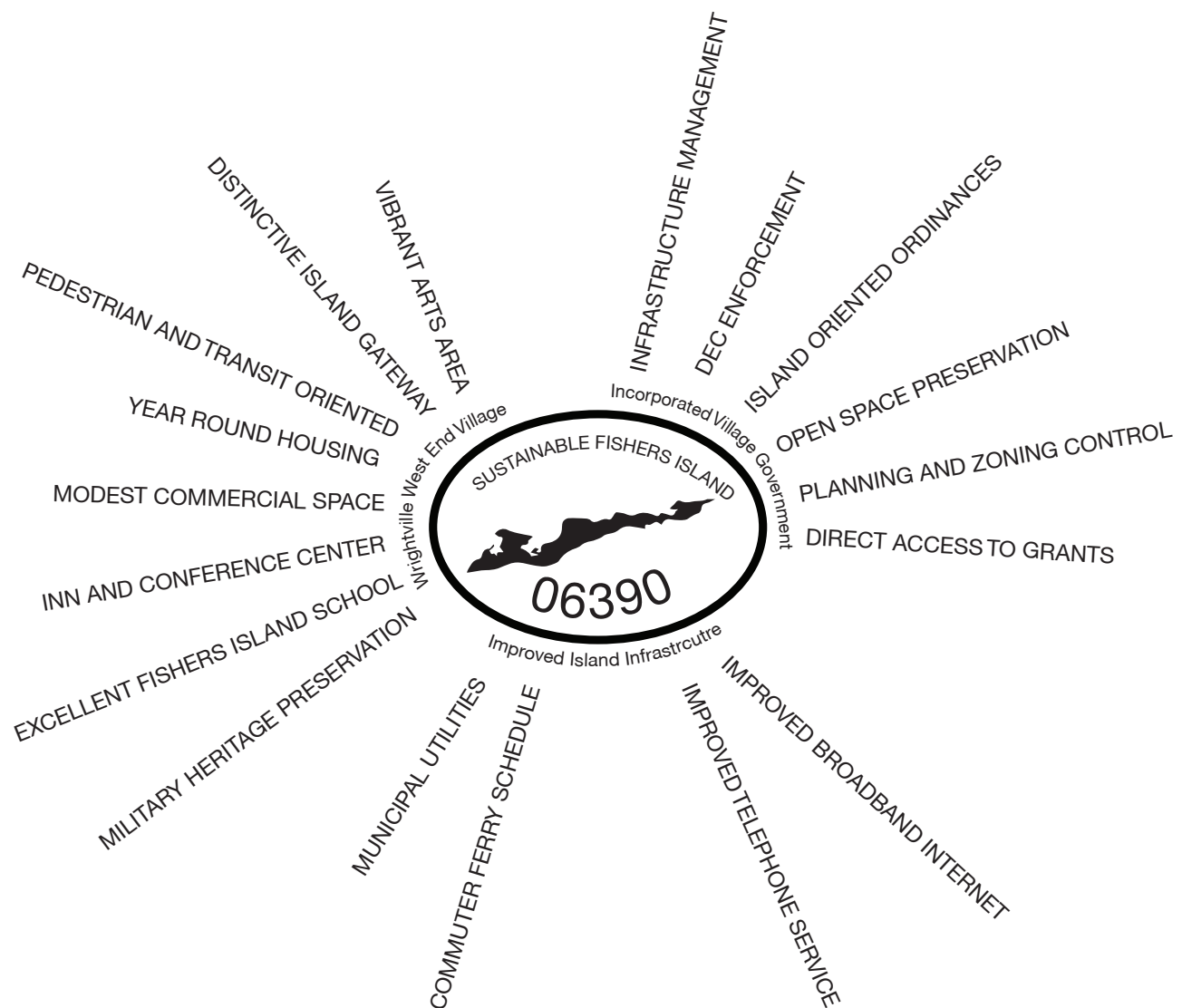
For ease of reference, below is a brief description of each of the following chapters, along with a condensed list of principal recommendations.

Chapter II of this report, titled “**Framing the Problem,**” presents in detail many of the issues facing Fishers Island today. It includes a brief history of the Island, as well as a thorough review of the last three decades of plans prepared for the Island.

Chapter III, “**Plan Methodology, Concept, and Implementation**” discusses how this project came about and was developed, the three strategies suggested in this plan, and how this plan might be implemented.

Chapter IV, “**Wrightville West End Village**” discusses the concept of creating a transit-oriented west end village in the old fort area, around the ferry landing, and includes recommendations about housing, economic development, and education. Recommendations include:

- Establish a clear west end village structure in the former fort area of the Island, that coordinates and connects new housing, job creation, education, transportation, and open space in a sustainable and appropriate manner.
- Develop a stock of affordable, year-round housing options for families, workers, artists,



professionals and elderly, according to a phased plan that concentrates development at pedestrian-accessible nodes on the west end of the Island, reinforcing a neighborhood scale and character of the west end village. Include accommodations for home-based businesses wherever possible.

- Develop new, flexible commercial space for small business and professionals within a compact, transit-oriented, pedestrian based, community framework in the west end village area of the Island, with good access to Island infrastructure and amenities like the ferry, community center and health club, Fishers Island School, and served by reliable, high speed internet connections.
- Develop new live-work apartment units in the west end village, through the reuse of industrial

buildings or the construction of new buildings. Provide a combination of unit types, including family housing with home office space and live-work open loft space.

- Develop a new gateway to the Island by creating a village square at the corner of Hound Lane and Greenwood Road. Consider incorporating a gateway element from the military history of the Island, such as a disappearing gun monument.
- Develop Hound Lane as a west end village main street, linking the ferry landing to the Island Community Center. After Village Incorporation, acquire Hound Lane and make it a true public street.
- Reconstruct and rationalize the central parking

lot adjacent to the ferry landing. Include attractive sustainable design features, such as pervious paving and bioswales to mitigate the parking lot's impact on Fishers Island Sound's water quality. Include pedestrian pathways and appropriate lighting.

- Provide targeted economic development opportunities, supportive of, and compatible with, current Island character and life-styles, including limited hospitality and conference facilities, small-scale retail and live-work opportunities, and significant new arts-related programming and development. Focus this new development in the fort area.
- Emphasize the arts, creative industry, telecommuting and hospitality as the basis for growing the local economy. Concentrate arts development in the west end village.
- Develop a small inn and conference center as an adjunct to new Island businesses and as a destination for board meetings and retreats, family events and hospitality.
- Consider establishing a local development corporation (LDC) to initiate and develop projects proposed by this plan on the Island, such as new housing, space for businesses and the arts.

Fishers Island School

- Continue to expand and improve the use of the "school-wide enrichment model" in partnership with the University of Connecticut.
- Commission an architect to do a detailed facility review and develop a plan of action for improving the elementary school's physical facilities, both indoor and outdoor.
- Improve arts facilities and programs. Consider establishing or expanding current collaborative programs with Lighthouse Works.

- Encourage new school employees, when hired, to become year round Island residents. Develop a recruitment package and assist/support relocation. Consider providing a financial incentive for employees to relocate to the Island.

Chapter V, "**Improving Infrastructure**" includes proposed improvements to the ferry, telecom, and utilities, including:

- Improve / increase ferry service for residents. Accommodate, in the most efficient possible way, residents wishing to commute to Connecticut in the morning, especially those going to mainland employers. Berth one boat on Fishers Island in Silver Eel Cove to allow boats to run inbound and outbound on a simultaneous schedule with a 7:30 morning departure, year round. Provide residential accommodations for the captain and crew of the Fishers-based boat in the Fort area of the Island. As the two existing ferry boats are replaced in the next 5-15 years, acquire more efficient boats, similar in size to the M.V. Race Point, to reduce travel time between New London and Fishers Island by 10-15 minutes.
- After Village Incorporation, consider making the ferry district a department of the Village, managed under the Island Manager, Mayor and Trustees, and eliminating the Ferry Commission. Taxing and bonding for capital improvements would then be made through the village budget.
- If the Ferry District is to remain a separate district, review and revise the enabling legislation to modify the requirements for becoming a commissioner, and/or reduce the number of commissioners, to make up for the reduction in qualified commission candidates.
- If the Ferry District is to remain a separate district, review and revise the enabling legislation to allow for the level of bonding necessary to replace the aging ferry fleet. Raise the tax cap as required to pay for those bonds.

- Work with the Fishers Island Telephone Company to improve internet service speed, reliability, bandwidth and throughput to support and attract new businesses, remote working, distance learning and social connections to the mainland. Look for near term solutions for expanding service using existing or upgraded infrastructure, and plan for long term investments required to link the Island to the mainland by underwater fiber optic cable.
- Support efforts by the Fishers Island Telephone Company to secure federal grants from the Rural Development agency of the United States Department of Agriculture or elsewhere to fund broadband improvement projects.
- Work with the Fishers Island School and Telephone Company to make sure broadband

service is sufficient to meet the needs of students accessing distance learning resources, research materials, and online media, as well as state mandated requirements for online exam administration. Investigate opportunities for state and federal grants to support this kind of infrastructure for education.

- Support the Fishers Island Utility Company's efforts to develop complete GIS mapping of the Island's utilities to better understand the condition of and manage the Island's water, electric, and telecom distribution infrastructure. If incorporated, consider developing and maintaining a municipal GIS database for the Island.
- Establish a targeted technology improvement zone within the fort area to support future commercial use.



- Assist home owners and business owners to reduce their energy bills by improving energy efficiency. Coordinate access to New York State energy efficiency improvement programs, including technical support, home energy assessments and grants and low interest loans provided by the New York State Energy Research and Development Authority (NYSERDA) and other agencies as applicable.
- Make electric rates for year-round residents competitive with nearby Connecticut towns. Consider reducing current year-round rates by 20% (and increase other rate classes to compensate for lost revenues) through the existing differentiated pricing system.
- Support new small businesses which are seen as in support of the goals of this plan, by creating

an additional special class of commercial electric service or modifying the existing commercial class service to provide incentive pricing. The incentive could be elimination of demand charges for the first one, two or three years of operation.

- Support businesses which operate year-round by reducing or eliminating commercial demand charges during those months when excess capacity on the submarine cable is highest.
- If village incorporation is achieved, commission updated reports from a qualified engineer and/or an attorney on the costs and benefits of converting the Fishers Island Electric Company into a municipal utility, given the value of the company, current and future bond rate projections, availability of NYPA power, wheeling charges, and the current wholesale cost of electricity.



- Improve pedestrian and bicycle connections between the fort area and the Village Green through new or improved sidewalks and bicycle lanes or multi-modal trails
- Make accessible and connect, through cycling and hiking trails, remnants of military heritage and natural landscapes on the Island, especially in the west end around the former gun batteries and the Parade.

Chapter VI, “**Getting It Done: Governance and Finance**” presents the idea of Village Incorporation, along with its costs and benefits. Recommendations include:

- Develop a realistic implementation strategy, schedule and assignment of responsibilities for this plan.
- Proceed with Village Incorporation. Establish an Incorporation Committee under the auspices of the Island Community Board to organize this effort. Retain legal counsel and establish a timetable for Incorporation.
- Determined with legal counsel, and the Town of Southold, Suffolk County and State of New York as needed, the precise administrative and financial status of Fishers Island going forward, and procedure and timetable for realizing that status.
- Develop administrative and financial agreements with Town of Southold and/or State of New York to establish specific responsibilities for administration, services, land use planning, and infrastructure.
- Once incorporated, elect a Mayor and Trustees, and hire professional staff with responsibility for managing the Island and executing projects.
- Establish a recruitment and retention office or advocate (a “population czar”) that works on

behalf of the Island to retain and attract residents. Develop a recruitment package to be given to those who might want to move to the Island as a year round resident.

- Maintain and support the volunteer structure of the fire department, EMT and Sea Stretcher. Provide incentives for new and existing year-round residents to volunteer.
- Establish clear and realistic phased targets for population growth and development a system for monitoring progress.
- Purchase or transfer ownership of all town owned property to the Village government so it may be managed from the Island.
- Protect open space, view corridors and environmentally sensitive areas conservation areas and easements, re-zoning as needed, and a clear plan establishing both opportunities and limits for development.
- Establish an ongoing community-based planning and evaluation process that regularly reviews and updates of assets, threats and opportunities.

Finally, Chapter VII, “**Next Step**” suggests practical steps for how to move forward with this plan.

Framing the Problem



GROTON

STONINGTON

Westerly

Head of Mistick
Porter's Rock

River

Pawcatuck

Narragansett Bay

Watch Hill

Watch Hill Reefs

Stonington Pt.

Fisher's Island

Hammocks

Fishes I.

Mason's I.
Dodges I.
Gates I.

Quiamboe C.

Gleason C.

Mickelquack C.

Mistick River

Pegued Fort

Fort Griswold

Fort Trumbull

Framing the Problem

The effects of continued population loss threaten an irreparable change to Fishers' character and way of life.

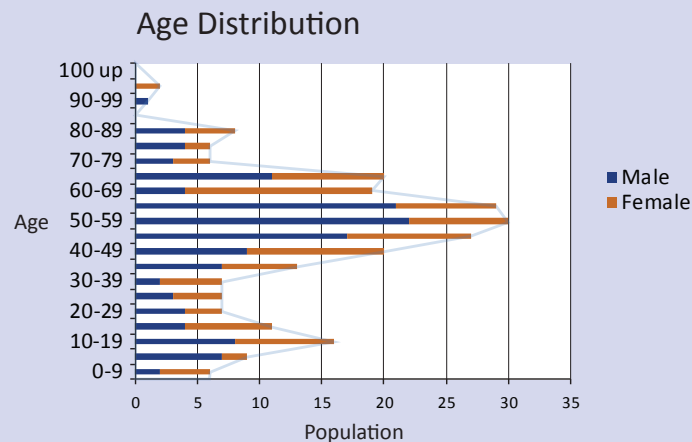
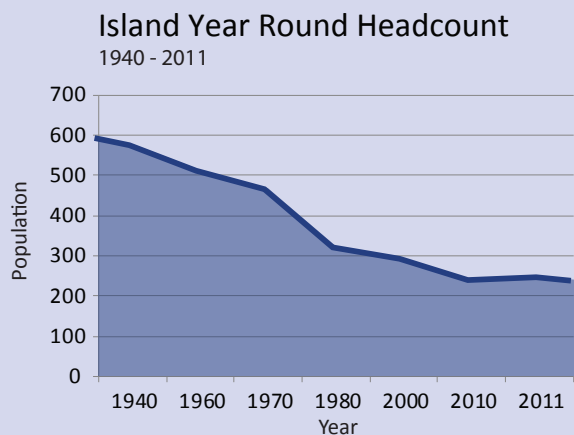
Contemporary Assets and Challenges to Life on Fishers Island: A Call to Arms

Fishers Island is a unique place in many ways. It has impressive physical attributes—stunning natural beauty and views, a sense of serenity and isolation from the routine of mainland life, an attractive, dispersed, village-like settlement pattern, a distinct sense of place, and historic architecture. These attributes are held dear by all who visit the Island. Outdoor recreation opportunities abound, including golfing, fishing, cycling, tennis, boating, and swimming, and Fishers' parallel histories of military and resort development provide a fascinating narrative and characteristic physical legacy on the Island. But beyond these physical, recreational, and historical assets, Fishers also has uncommonly strong local institutions and a sense of community rarely found these days. Despite the lack of 'official' mechanisms of governance and community decision making, Fishers Islanders have found ways to get things done. Fishers is a place where people know each other and generally work together for the betterment of the Island.

This makes itself apparent in many ways. The Islanders we met with in the course of this planning effort, both year round and summer residents, served on multiple volunteer committees and commissions, and as volunteer firemen, EMTs and sea stretcher captains. When problems arise on the Island, or when needs are identified (like the need for a community center, affordable housing, or a new bike trail) groups of residents have self-organized with the vision and funds to take on these projects without the aid of the government. Fishers' local institutions and businesses, including the churches, the Fishers Island Community Board, Island Community Center, Ferguson Museum, the clubs, and Fishers Island Development Corporation (FIDCO) are all interested and active community players. Fishers has a self-reliant, highly capable and well-connected population, and ability to raise significant capital for community projects, and to get them done.

But there are significant challenges to Fishers' future social and economic sustainability. The Island has suffered a severe decline of year round population since the 1940's. This decline is the





FISHERS ISLAND'S POPULATION PROBLEM

If the current population trends continue, Fishers Island can expect to see continuing loss of year-round population. Since 1940, the year round population of the Island has fallen from more than 600 to fewer than 250. The greatest decline (by percentage) historically occurred between 1970 and 1980, when the Island lost 31% of its year round population. In the most recent decade, from 2000-2010, the Island lost around 18% (See *Exit Rate Changes*, right and *Island Year Round Headcount*, above)

The Island population is aging, and the pool of younger people (ages 0-40) is quite small as a percentage of the overall population (see *Age Distribution*, above). Today, the largest segment of the year round population is between 40 and 60 years old. 80% of year round households consist of only one or two people (see *Household Size by Housing Tenure*, above) and the number of women of childbearing age (20-40) is one of the smallest demographic groups. This likely means that there will be fewer Island-born boys and girls to replace the elderly as they leave the Island or pass away (assuming these youth would want to remain on Fishers as adults). While there is no official data on the number of Fishers youths who stay on the Island into adulthood, interviews with Islanders suggests that at least some will leave to pursue work and family life elsewhere. Since there is no natural growth to Island population, the only way to stabilize and grow the population will be to recruit and encourage new year round residents.

One key aspect of this will clearly be making better allowances for commuting to work. Today, almost all year round Islanders find their employment on the Island, with only a handful commuting off—suggesting transportation barriers today are substantial (see *Place of Work*, above).

Exit Rate Changes

1940 - 2011

	Percent Change
1940-1960	-11%
1960-1970	-9%
1970-1980	-31%
1980-2000	-9%
2000-2010	-18%

Places of Work for F.I. Adults

	Men	Women	Total
In State	94	66	160
Out of State	1	2	3
Total	95	68	163

Household Size by Housing Tenure

	Owner Occupied	Renter Occupied	Total
1 Person	18	29	47
2 Persons	30	20	50
3 Persons	5	5	10
4 Persons	2	5	7
5 Persons	3	3	6

result of a variety factors: declining employment opportunities and job diversity; high cost of living, including food, energy, communications and transportation; a dearth of affordable and appropriate year round housing; limited primary and secondary educational options; transportation and communications complexities; and limited opportunities for a social life and activities. These challenges have been compounded in recent years by other factors, including unfavorable demography within the year round population resulting in fewer Island families, and the absence of any mechanism to help recruit or retain residents.

While declining year round population is not, in and of itself, a problem, its effects threaten to irreparably change Fishers' "way of life," which is held dear by residents across the Island. This change includes the obvious erosion of economic and other kinds of diversity, and with it, a decline of civil society on the Island. But there are also pragmatic repercussions. With ongoing reductions to the year round population, access to local, accessible professionals like plumbers, electricians, and doctors, and to businesses, like grocery stores and restaurants will continue to decline. Perhaps even more importantly, fewer and fewer qualified candidates of the appropriate age will be available to fill community safety positions on Island (firefighters, emergency medical technicians and Sea Stretcher captains), threatening the viability of providing emergency services as a low-cost, volunteer-based public service. Further decline in population also means fewer qualified candidates will be available to serve on the critical commissions that administer the four major tax districts – Fire, Sanitation, Ferry, and School.

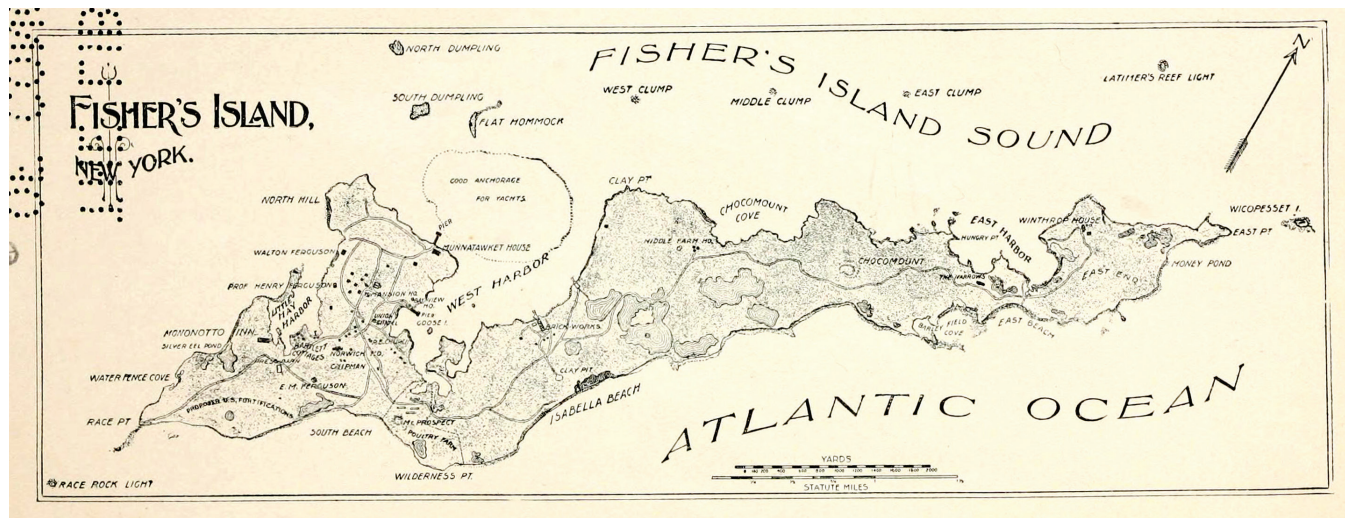
Continuing population decline will also have profound effects on the Fishers Island School. The School already imports half of its student body from Connecticut (at great cost to Fishers Island's taxpayers) to be viable; further demographic erosion could push the School over the edge unless something is done to introduce new students

into the system, especially in the Lower School. **Indeed it is possible that Fishers is already at the population-loss precipice: the slightest further decline in population threatens a domino effect, making it increasingly more difficult for those left behind to manage and remain.** While earlier plans have prognosticated on this issue, and changes have been slower than predicted, it is clear that population erosion has continued, impacting the quality of life on the Island negatively.

There are other threats to Fishers way of life. Adverse, unplanned development on the Island could significantly and irreversibly change the character and scale of the place. Tourism of an inappropriate scale or character could also have a deleterious effect on safety and quality of life. Increasing cost and complexity of training firefighters and EMTs (which must be done in New York State, or trainers brought to the Island) threatens the viability of the emergency services system. Finally, climate change, hurricanes, and sea level rise, have the potential to wreak havoc on Island life, if not eliminating it altogether.

Despite 30 years of self-funded plans and studies, severely limited local control of resources, and lack of local decision making authority, make it difficult, if not impossible, to address these concerns in a comprehensive way. As part of a geographically remote political entity, Fishers has little or no government authority. What limited local political representation it has consists of a single Town Board seat filled by an Island resident but elected at large, and a representative on the Planning Board and Zoning Board. Its public financial resources (property and sales taxes) flow out to Southold, Suffolk County, and New York State, with little tangible benefit flowing back to the community.

Today, on Fishers Island, no one is in charge. There is no local, accessible infrastructure available when things need to be accomplished or



The Novi Belgii Novaeque Angeliae (Map of the New Netherlands) (opposite) created by Nicholaes Visscher ca. 1685 based on the 1651 map of Jaoannes Janssonius, is one of the oldest cartographic depictions of the Island, indicated as "Vyshers Eylant". (Source: University of Connecticut Map and Geographic Information Center)

1897 Map of Fishers Island (above) shows the earliest infrastructure for Island tourism - the Bartlett Cottages, Mononotto Inn, Munnatawket House and "good anchorage for yachts" in West Harbor. The rest of the Island is rural, with a few farm houses and the brickworks. The "Proposed US Fortifications" appear at the west tip. (Source: Munnatawket House, Fishers Island New York: A charming Seaside Resort. Library of Congress Digital Collections.)

when there is a problem. Without accountability and a coherent, capable Island government, there is no one to coordinate municipal services, plan for the future, or execute projects. Today, what counts for "planning" is generally reactive instead of proactive, forcing change by "putting out fires." The private initiatives that have had success addressing individual problems in the past, while clearly an Island strength, are often piecemeal and fragmented, contributing less to the overall good than they could.

Ultimately, lack of local power and governance means that the future for Fishers is unpredictable, and uncontrollable.

Fishers Island: How it Works Description and History¹

Fishers Island is situated in Long Island Sound, five miles off the coast of New London, Connecticut, and is approximately 7 miles long and 3/4 mile

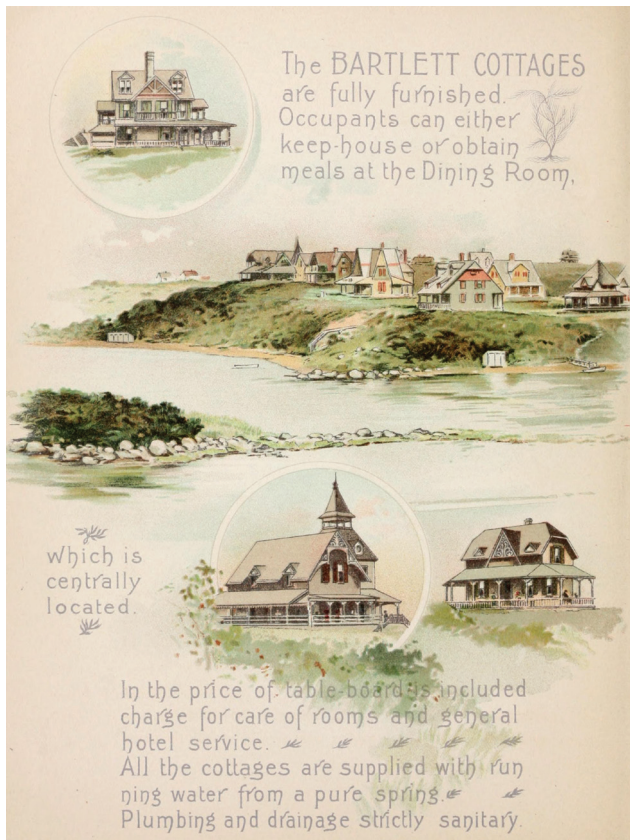
wide. While it is geologically an extension of Long Island, and politically a part of the Town of Southold, New York, it has no regular connections to New York State. Ferry service connects the Island to New London, and all commercial, financial, medical and utility ties are through New London and Groton, Connecticut.

History

Originally called Munnawtawkit by Native Americans, the Island's first inhabitants likely used the heavily wooded Island primarily for summer fishing and clamming. The origins of the name "Fishers Island" remain shrouded in mystery, but several historians believe the name derived from aboriginal fishing in surrounding waters.

In 1640, John Winthrop, Jr., son of the famed founder and Governor of the Massachusetts Bay Colony, obtained a land grant for the Island from Massachusetts. When he later became governor of the Connecticut Colony, the Island's fate as part of Connecticut seemed assured—but in 1664, the Duke of York asserted that Fishers would instead be a province of New York. Many believe this was retribution against New Haven for harboring three of the regicides (Dixwell, Whalley and Goffe) who

¹ For his assistance with this history of the Island, we are indebted to Pierce Rafferty, Director of the Henry L. Ferguson Museum on Fishers Island.



Advertisement for the Bartlett Cottages (above) taken from Walter and EM Ferguson's 1890 advertising booklet "An Island of Homes" describing the Island summer resort with. (Library of Congress Digital Collections)

had executed his father, Charles I.

Successive generations of the Winthrop family operated Fishers Island as a stock farm, frequently leasing out the Island to tenant farmers for the primary purpose of raising sheep and cattle there. By the early 19th century, the forests were all but cleared and records indicate some timber was shipped to market for shipbuilding purposes. With deep deposits of clay soil, bricks were manufactured on the Island from the colonial period until the early 20th century. The Winthrops held the land until 1863, when they sold it to Robert Fox, a merchant who retired to the Island, became a gentlemen farmer, and restored the farms that were, by then, in decline. Upon his untimely death in 1871, his widow began the process of developing the Island's infrastructure in a way that supported tourism—building roads,

subdividing the land and selling building plots, beginning the modern history of Fishers. A number of houses were built at the west end of the Island during this period, as was a resort hotel on the north shore near the opening to West Harbor. Visitors soon began streaming to Fishers, primarily on excursion steamers originating from Norwich, New London and other river and coastal towns.

In 1889, Connecticut brothers Edmund and Walton Ferguson purchased 90% of the Island. Seeing the Island's potential as a modern resort with an elite, seasonal clientele, they invested heavily in infrastructure in the west end, expanding the road network, building a telegraph, a power plant, waterworks and force mains, a reservoir, hotels and cottages, and set up a ferry company to move visitors back and forth from the mainland with regularity.

Henry and Alfred Ferguson, children of one of the original owners, focused their attention on developing the primarily agricultural east end of the Island into a private resort community. They hired Fredrick Law Olmsted, Jr. in 1924 to plan and subdivide the land, and Seth Raynor to design a golf course at the eastern tip, complete with grand clubhouse. Around 35 houses were built prior to 1933, when the Great Depression's effects stalled construction. By 1940, the east end development had failed and the Fergusons had lost control of the development. Owners of existing summer homes at the east end formed a new organization called Fishers Island Estates to acquire the land and assets of the failed development.

Military Development

Fishers Island's parallel strategic and military history began when the Governor of colonial Connecticut set up an early warning station on the Island in the early 18th century to provide New London with advanced notice of approaching enemy vessels.

By 1850, an unmanned life boat station had been established on the Island to assist mariners in times of trouble by the Life Saving Benevolent

Association². In 1904, a Life Saving Station was established on East Harbor that became a Coast Guard Station in 1915. In the 1950s, the Coast Guard moved operations to Silver Eel Cove and still maintains a sub-station at that site today.

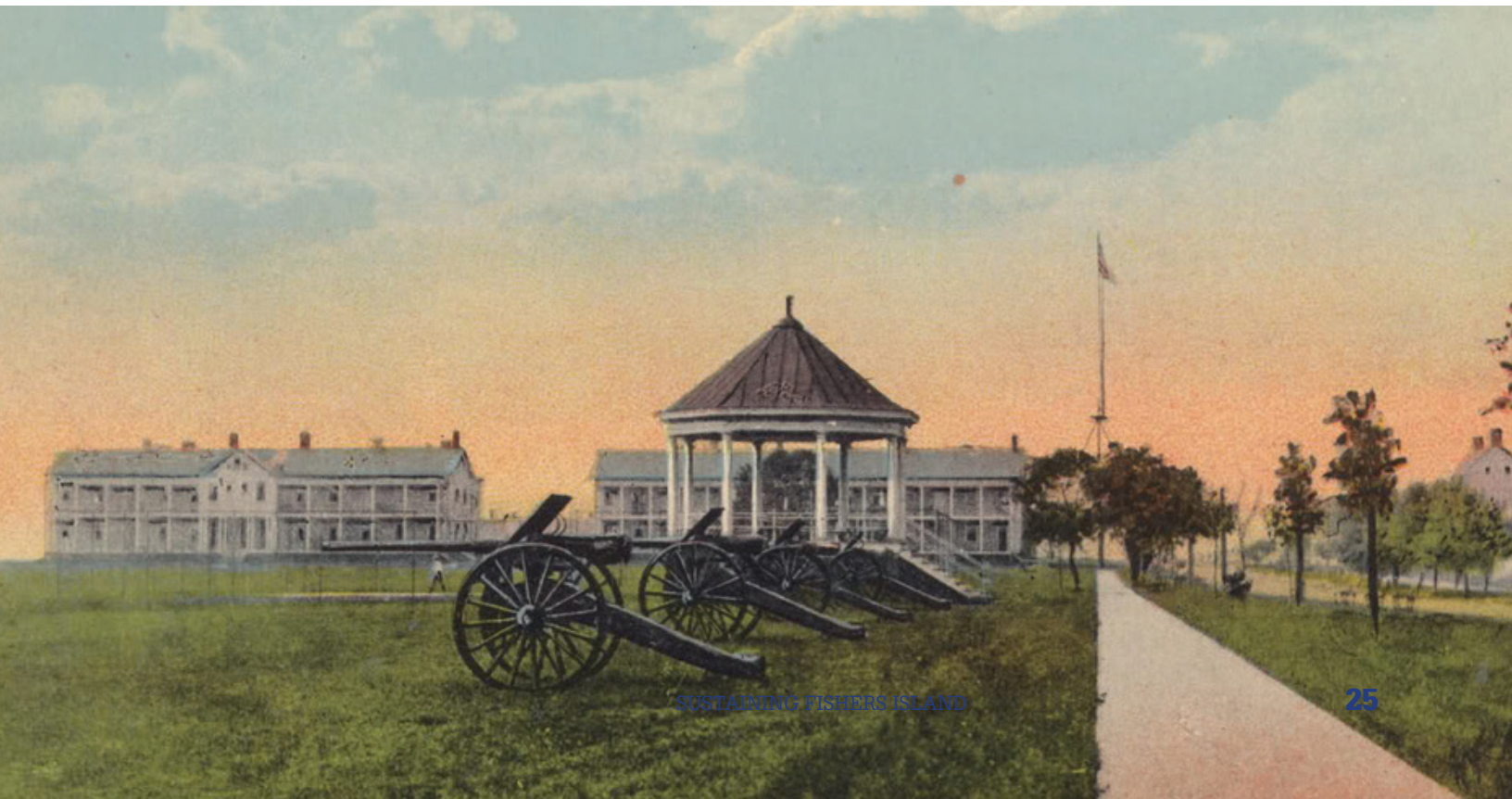
A series of temporary training camps, beginning with Camp Fishers Island in 1879, were set up by the U.S. military on the western tip of the Island. In 1898, the Fergusons were compelled to sell 216 acres at the western tip of the Island to the U.S. government for fortifications purposes. Fort H.G. Wright was founded on this land in 1900— part of the larger “Endicott System” of coastal defense forts. Fort Wright was made headquarters for the Defenses of Long Island Sound: designed to

protect the mouth of the Sound (and ultimately New York City), and later, naval manufacturing in Groton. Fort Wright eventually consisted of several heavy artillery batteries installed with different types and sizes of guns (including a number of the famous “disappearing guns”), an airstrip and blimp moorings, ferry landing, officers’ quarters and soldiers’ barracks, a PX and movie theater, parade ground, a national guard camp, and other supporting buildings. The Fort was an active town with a large population (more than 1,500 people at its height during the First World War) and contributed to the sense of the Island as a vibrant place. In its early days, visitors would come to the Island specifically to watch the activities and training exercises at the Fort.

2 “Life Saving Enterprise.” *New-York Municipal Gazette*, Vol 1. No. 60 (March 1850), 1049.

But the Japanese attack at Pearl Harbor in 1941 illustrated the increasing obsolescence of these

Early 20th century postcard of Fort Wright showing the Parade with artillery and bandstand in the foreground, and the barracks, now demolished, that occupied the western edge of the Parade, giving it definition as a space. (Source: Matt Edwards Collection)



kinds of emplacements, which ceased to be of strategic value in light of the evolving technology of warfare—by 1948, the military had shuttered the Fort, transferring twenty five acres from the Army to the Navy for use as a field station of the New London Navy Research Laboratory, including its Underwater Sound Lab (an area at Wilderness point, adjacent to Hay Harbor Golf Course is still an active Navy reservation), and declaring the rest as surplus.

Fishers Island Today

In 1958, a group of summer residents organized the Race Point Corporation to purchase much of the former base in order to assure its ultimate disposition through careful resale, later deeding a large portion of this to the Town of Southold. About 4 acres were transferred to the Fishers Island School, where the current school building was constructed. In 1960, Race Point bought Fishers Island Estates, a successor to Fishers Island Farms which controlled the east end of the Island, and reincorporated as Fishers Island Development Corporation (FIDCO). It is the largest land holder on the Island

Ultimately, the east end of the Island was built out to a density about one third of the Olmsted plan, giving the area its rural, bucolic character rather than the more suburban character the full build out would likely have produced. This area today continues to comprise a privately-managed, gated community, while the western third is a primarily residential area with some nodes of commercial and industrial use.

The seasonal and summer families of the Fishers Island community have historically been strongly connected to the Island, often spending their time and resources to make the place better. But the way Fishers Island is used by its seasonal residents has evolved over the last fifty years. The days when a family (or part of one) might have spent an entire season on the Island, are, for the most part, past, and as the older generation passes on and new seasonal owners move in with less connection to the place, the society of charity and care that

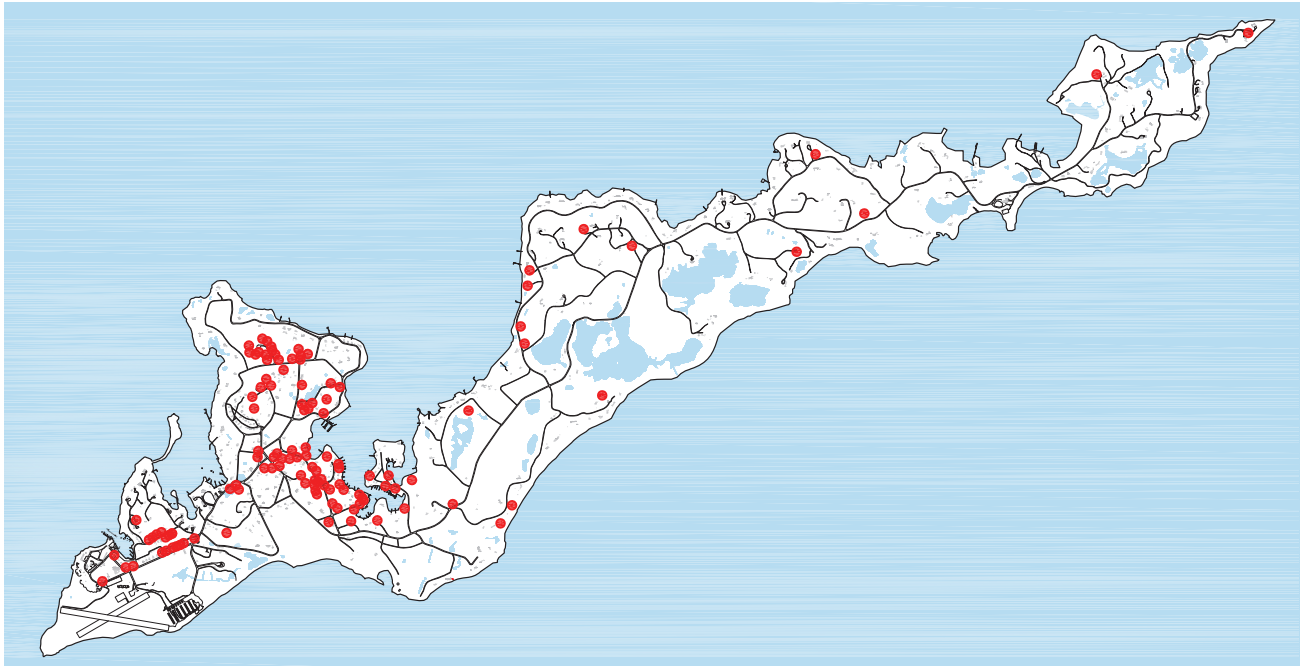
has kept the Island going with little help from government may loosen or disappear.

Island families today come and go more often, and in multigenerational families, where the parents or grandparents might own an Island house, the progeny might now need to rent a house to accommodate their own children and guests during a summer visit. This has created a robust short term rental market on the Island. Members of the Fishers Island Club who do not own real estate also fuel this rental market—visiting the Island for just a few days each summer, renters have little investment in the long term sustainability of Island institutions or the stability of the year round population.

Among more wealthy Island residents, the exclusive clubs are a big factor in the social life of the Island, and access to the Fishers Island Club and its golf course in particular, is a primary motivation for purchasing high-end real estate on the Island. But the exclusivity of the club, which claims a waiting list of 7 or more years, effectively depresses the value of real estate, especially at the highest end of the market (\$1M+), and makes sale at the high end more fraught. Finding new buyers for these homes with the same dedication to the Fishers community as the previous owners can be difficult.

Most year-round residents live in the western third of the Island. Many people in this community are engaged in the maintenance and management of Island real estate, construction, and landscaping, some are teachers or administrators in the Fishers Island School, some run Island businesses, and others are professional managers for Island enterprises. At present time, very few commute to off-Island jobs. Most year-round Island families send their children to the Fishers Island School.

Because of its history and geographic isolation, Fishers Island has developed unusual ways of managing its needs. Services are provided on the Island through a mosaic of public, private, and non-profit entities, each of which operates out



YEAR ROUND POPULATION DISTRIBUTION (above): this map illustrates that year-round households cluster at the west end of the Island.

of good-will towards the Island, but which are themselves uncoordinated to one another, limiting the potential for critical decision making and management.

Many essential public services are provided through special taxing districts, whose boundaries are more-or-less contingent with the boundaries of the Island. Each of these districts, which include the Fishers Island School³, the Fire District, the Waste Management District, and the Ferry District, is managed by its own set of commissioners, elected from the year-round population of the Island, and largely staffed by Islanders (with the exception of the school - about half the teachers commute from nearby Connecticut towns). Emergency Services are provided by a volunteer fire department, which is staffed by year round residents, and includes firefighters, emergency medical technicians, as well as the *Sea Stretcher* boat which transports Islanders to a New London Hospital in case of serious emergency. Community safety is provided by a constabulary, including

three part time constables who are employed directly by the Town of Southold, and in the summer, a small post of New York State Troopers.

Other services are provided through private interests, which are either actual non-profits or which operate in the public interest despite being structured as conventional companies. Utilities, including water, telephone and internet, are provided by a private utility company. The 2007 *Fishers Island Strategic Plan* identified 20 non-profit groups operating on the Island to serve various needs, including access to healthcare (Island Health Project), recreation (Island Community Center, Island Bowling Alley, Island Concerts), and affordable year round housing (Walsh Park Benevolent Corporation).

Other services, such as road maintenance, planning and zoning, permitting, and safety inspections are managed from the Town of Southold, but without a presence on the Island, interaction with the Town is frustrating if not ineffectual.

3 The Library Association is also funded through the School District.

Licensing is also a particular challenge for Islanders, since sites for New York State exams and

training are typically in New York State, which is not readily accessible to the Island. For Instance, Islanders who wish to renew their driver's licenses in person must make the trek to Westchester County or Long Island to do so.

For many years, the Fishers Island Civic Association (FICA) worked to bring together the various groups and voices on the Island to try to provide some level of coordination. From 2004-2006, Maine's Island Institute sent two Fellows to the Island. With their assistance, a number of administrative changes occurred including the reorganization of the FICA into the Island Community Board (ICB), composed of representatives from each of the four tax districts, six elected members (three year-round and three seasonal), appointed representatives from the Walsh Park, Island Health Project, Fishers Island Development Corporation, and Fishers Island Utility Company, and the Fishers Island representative to the Town Board, *ex officio*. It was hoped that the ICB could serve in a coordinating and communicative role, keeping everyone in the community involved and apprised of what was going on, and providing a venue to discuss strategic decisions. It began publishing a community newsletter called *The Fog Horn* (which has recently moved to a new Island website) to keep community members apprised of Island events and developments.

Since then, the Fishers Island Community Board has functioned as a *de facto* government for the Island. It has commissioned reports, facilitated communication between Island institutions and hosted community meetings. But ultimately, its efficacy as an Island management structure is limited by its lack of reliable, sustainable financial resources (it does not receive public monies in support of its mission – instead it, like other Island institutions, must “pass the hat”) and the fact that it has no legal standing or authority. The ICB can neither execute plans, apply for government resources, nor negotiate with New York State, Suffolk County, or the Town of Southold.

Previous Studies

Over the last 30 years, many of the issues discussed in the current plan have been enumerated in a series of studies, reports, and memoranda which examined aspects of Fishers Island's particular situation. Though some of these were publicly sponsored reports, many were financed privately by Island residents—the sheer number and quality of these projects is a testament to Islander's concern about the future. Common themes in nearly all these reports include concerns over year-round population loss, growth of the summer resort community and protection of open space and the natural environment.

Trust for Public Land Report 1984 / 1987

The oldest of these reports was the 1984 Trust for Public Land report sponsored by the Fishers Island Civic Association (FICA) which assessed the Island's infrastructure and ability to accommodate continuing development while protecting its natural resources. It inventoried Island resources, and began to articulate many of the concerns about development on the Island that continue today. The report was revised and expanded in 1987 to update the inventory and to include both ends of the Island.

Specific recommendations of the 1987 report included⁴:

- Respond to “continuing decline in year-round resident population and the steady growth in seasonal population” by implementing the recommendations of the Fishers Island Growth Committee.
- Establish a 501(c)3 housing corporation to develop the affordable housing stock.
- Establish an “Island Conservation Committee” to lobby for better environmental protection and more thorough planning and zoning reviews.

4

Byers 1987, 66-68

“Several obstacles to bringing people to the Island on a full time basis were identified: high property taxes, the diminishing pool of moderately priced housing and rental space, lack of commercial space, high utility rates for businesses, an accommodating but not always efficient ferry freight system, the seasonal only nature of cultural events and activities, the absence of a formal daycare and the high cost and declining number of Island students at the school.”

—Fishers Island Growth Plan 1994, Fishers Island Civic Association

- Protect the character of the west end, and, given a large number of buildable sites, develop and institute legally binding design guidelines for new buildings in the west end, possibly using FIDCO's guidelines as a template.
- Using the data in the report, implement private land preservation initiatives to control growth on the 425 remaining undeveloped lots on the Island. Three mechanisms were recommended: the Fishers Island Museum Land Trust should take a more active role working with private land owners; FIDCO should review and potentially withhold parcels in the east end from sale, place conservation protections on its own land, and allocate permanent conservation easements on land transfers instead of the current 20 year covenants; and the Civic Association and Conservancy should lobby for a 2% transfer tax on all real estate transactions to be used by a nonprofit to purchase open space.
- Commission a cost-benefit analysis to determine the costs of upgrading infrastructure to accommodate future development vs. the benefits of that development, and based on these findings,

consider implementing growth controls.

Incorporation Study Report 1985

Following the 1984 report, and perhaps in direct response to it, there was a flurry of planning activity on the Island. In 1985, the FICA recognized the need for a more sustainable management strategy for the Island, and itself issued the *Incorporation Study Report*, which first looked at the potential for establishing an incorporated village government for the Island. While not tasked with making a specific recommendation regarding governance, this report studied what kinds of responsibilities a village would have, and what the costs and benefits might be:

- Village incorporation could provide a more responsive government for the Island, and with home rule would come the ability to self-determine the Island's future⁵.
- Certain financial and managerial efficiencies would be found in a village, including bringing the

5

Clavin 1985, 6

ferry, garbage, and fire districts under the common control of the village administration (the school district would remain on its own). Converting the electric utility to a municipal utility could result in significant savings, including reduced taxes and access to low cost hydroelectric power from the Power Authority of New York State (PASNY) (referred to as New York Power Authority, or NYPA in other parts of this report)⁶. Taxes might also be reduced, depending on the structure of government and the continuing tax rate to the Town of Southold⁷.

- Village government would have 6 elected officials, including a mayor, four trustees and a police justice, who must then appoint a village clerk and village treasurer (can be same person). Departments that should be included in a village government on Fishers include zoning and planning, law enforcement, public works, refuse collection, ferry operation, airport operation, and parking. Other departments that could be added later could include parks and recreation, harbor control and mooring control, mosquito control, housing authority, and municipal utilities⁸.
- Incorporation requires “regular inhabitants” numbering 500—disqualifying the Island in its current status. However, a voter registration drive could produce the 500 required.
- Concerns over incorporation include limited manpower available to staff a government and increased on-Island politics and cliquishness⁹.

In 1985 there was also a push in the Town of Southold to form a municipal electric utility in order to reduce costs to ratepayers and get access to inexpensive hydropower from upstate. The town first commissioned an engineering report for the mainland only, but under pressure from the

Island commissioned a second engineering report for Fishers. A legal report was also commissioned, and included detailed analysis of the Fishers Island situation.¹⁰

The engineering report was prepared in 1985 by Massachusetts based R.W. Beck and Associates and addressed the costs and benefits of converting the Fishers Island Electric Company into a municipal utility, something which could only be initiated by an incorporated Village of Fishers Island or by the Town of Southold. Under their assumptions, which included immediate access to PASNY power, a 9% bond rate, and using a Net Book Value method to calculate the value of the utility, a 10.74% savings could be realized by ratepayers over the 1986 rate. In a second case they calculated the maximum bonded amount available for purchase and start-up of the utility, based on a break-even situation for rate payers, of \$1,067,250¹¹.

This was followed in January of 1986 by a report from Washington, D.C. based law firm Duncan, Weinberg and Miller called *Legal Report Respecting the Feasibility of Establishing a Publicly-Owned Electric System and Securing a Bulk Power Supply in the Town of Southold, New York including Fishers Island*. The report is a detailed analysis of possible forms that a publicly owned electric system for the Town of Southold might take, their potential costs and benefits, how they might be formed, and what kinds of power and wheeling they might have access to. Of the 129 page report, 17 pages of text pertain directly to Fishers. Specific findings include that:

10 In 1985, the Long Island Power Authority was formed under New York State law as a municipal electric utility, acquiring Long Island Light Company’s generation and distribution network, and ending the impetus for the town to form its own municipal electric utility. As of 2013, Governor Cuomo has advocated retuning it to a private utility as a result of the recovery failures after Hurricane Sandy in 2012.

11 R.W. Beck and Associates 1987, 7

6 Ibid., 3
 7 Ibid., 4
 8 Ibid., 2
 9 Ibid., 6

- The current locally controlled investor-owned utility presents few or no advantages to ratepayers¹²
- It would be advantageous for Fishers Island to form either a rural electric cooperative corporation or a municipal utility to reduce costs and become a “preference purchaser” of PASNY hydropower¹³.
- A municipal utility may be established either by the Town of Southold or by an incorporated Village of Fishers Island¹⁴.
- While potentially complicated, in the case that either a municipal utility or an electric cooperative purchases hydropower from NYPA, wheeling of power from the New York State line through Connecticut’s distribution network could be negotiated.

Fishers Island Growth Plan 1988

In 1988, the FICA issued its first *Fishers Island Growth Plan*. While the Trust for Public Land report initially gave voice to many Island concerns, this plan is the first to express the desires of the Island community in its own voice. It clearly sets down a set of Island concerns which residents are still grappling with today, 25 years later.

An important aspect of this plan is its assumption that there were insufficient reasons to change the government of the Island at that time, and that there would be no change in the foreseeable future. This plan, therefore, attempted to articulate a common vision as a kind of constitution that could be referred to by the Fishers Island Civic Association, the representatives for Fishers on the Town Board, Zoning and Planning Boards, independent Island organizations, and individuals when making strategic decisions about their futures. Underlying the plan were a set of shared assumptions that were developed in a series of

public meetings and discussions, and included¹⁵:

- Fishers Island must have a viable year round population.
- The summer population growth must be slowed.
- The Island should remain a residential community and tourism discouraged; commercial activity should focus on resident services.
- The natural environment must be protected.
- The Fishers Island School must be strengthened through enhanced programs and a larger student body.
- Make people and organizations on Fishers aware of their interdependency so they may work for the common good.
- Encourage Island residents to support programs which use private initiatives and land protection strategies to preserve open space on Fishers.

These assumptions are followed by four sections of specific recommendations and action items falling under the headings Governance, Year Round Residents, Protection of the Natural Environment, and Summer Development.

Fishers Island Growth Plan 1994

In 1994 the plan was updated. It notes that while some improvements were implemented since the first plan, including establishing the *Fishers Island Gazette*¹⁶ to disseminate information, establishing the Walsh Park Benevolent Corporation to address housing needs, and instituting a commuter ferry

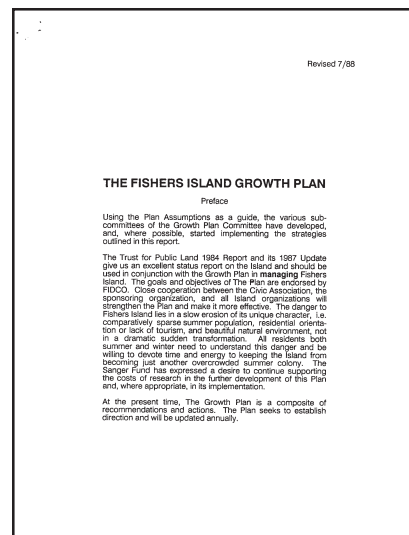
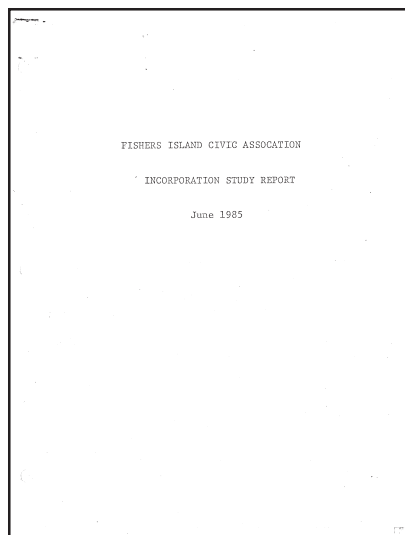
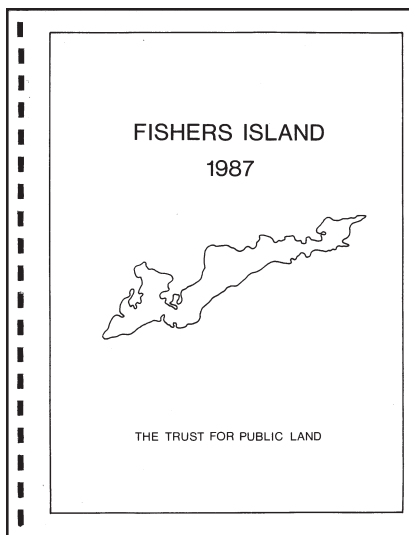
12 Duncan, 89.

13 Ibid., 9, 89.

14 Ibid., 90-94.

15 Fishers Island Civic Association 1988, 2.

16 The *Gazette* was published *in absentia* by Dan Gordon from 1987 to 1992 from Philadelphia, then was taken over and published by Betty Ann Rubinow until May 2010.



schedule,¹⁷ the general assumptions noted in the first plan remain applicable. It uses stronger language to note three primary “threats” to the unique character of Fishers Island: increased seasonal housing and population density, declining year-round population and tourism¹⁸. Four sections similar to the 1988 plan follow with specific observations about how these threats might be counteracted. These recommendations are too numerous to reproduce here.

Island Institute

In 2002, Islanders visited Maine’s Rockland-based Island Institute to look for synergies between Fishers Island’s challenges and those of Maine’s small Island communities. The discussion in Maine focused on:

...problems common to many islands: the difficulty of running (and paying for) a small public school; the costs and challenges of law enforcement; state and federal mandates that don’t fit island situations; the need for health care and other social services; what it means to be ‘out of sync’ with mainland communities. In addition, Fishers, with its large number of expensive summer homes and its proximity to Long Island Sound’s over-the-top real estate market, was forced to deal with a housing market, property taxes, and real estate value that—

*from a small community’s standpoint, at least—could only be described as out of control.*¹⁹

Some of the main points of this discussion were put in a brief document called the *Island Institute Report* which provides impressions of the Island, records its strengths, and lists actions that should be taken including: reorganize the FICA mission and board composition and create a body that can act rather than simply discuss; create a staffed town office on the Island, pursue elder-care options, establish an education foundation that works with the school and has a fund from which community organizations can apply for grants, put a ferry boat on Fishers Island and attract a captain to live on the Island, intensify efforts to build more affordable year round housing; Look at Maine schools, health care facilities, and utilities for ideas; and, organize visits to island schools in Maine and maintain relationship with Island Institute.²⁰

After the visit, Fishers requested the placement of an Island Fellow in 2004. Two Island fellows served the Island between 2004-2007, with the second fellow staying on for several years after in an administrative role for the Island Community Center and ICB. The Island Fellows arrival coincided with renewed interest in finding solutions to Island management, and with his help there was reorganization—the Fishers

17 The commuter schedule has since been eliminated.

18 Fishers Island Civic Association 1994, 3.

19 Platt 2006, 83.

20 Island Institute Report, 2.

Island Civic Association, which had become somewhat ineffectual, was reorganized as the Island Community Board (ICB), composed of representatives of each taxing district, six elected members, half from the year round population and half from the seasonal, appointed representatives from Walsh Park, Island Health Project, Fishers Island Development Corporation, and Fishers Island Utility Company, and the Fishers Island representative to the Town Board, *ex officio*. The ICB's stated mission was to serve as a "focal point for participation by individuals and organizations in the determination and execution of goals for the Island."²¹ With the assistance of the Island Fellows, an administrative Island Office was established and staffed by the fellows themselves, the *Fog Horn* non-profit newspaper was started, and the Island Community Center constructed. A record of their experiences was published as *Giving Voice: the Fishers Island Project*.

Local Waterfront Revitalization Program 2004/2011

In 2004, the Town of Southold formally adopted its voluminous *Local Waterfront Revitalization Program* (amended in 2011.) The report's primary focus is on conservation and protection of coastal resources of the Town, and Fishers Island is covered in its own chapter. It cites the 1994 *Growth Plan's* concerns about development and uses them as the basis for analysis and to set up priorities.

The report considers the Island as an "area of stable uses" overall, but the potential for increased seasonal residential development is a threat to the environmental and community character of the Island. The town of Southold identified six areas of special concern regarding Fishers Island²²:

- West Harbor, is a significant maritime commercial center on the Island, and is becoming increasingly congested with competing

commercial, recreational boat traffic.

- Fort Wright is under-utilized and should be redeveloped to provide year-round jobs and housing. Silver Eel Pond's water quality needs to be protected and ferry access maintained.
- FI beaches, Pine Islands, and shallows are currently undeveloped but privately owned and serve as habitat to many nesting shorebird species, and are highly vulnerable to disturbance by humans from mid-April through July
- The Race and the Conservation Zone is a regionally important lobstering area and sports fishing zone, and must be managed and conserved as a resource.
- Dumpling Island and Flat Hammock are important habitat for nesting birds and should be conserved
- Fishers Island water supply watershed is a concern given the impacts of increased development

One of the primary recommendations of the plan was to implement the Fishers Island Harbor Management Plan, which was adopted into law in 1997. Other recommendations included the Town working with the Fishers Island community to develop and implement revitalization of Fort Wright and Silver Eel Pond, working with Fishers Island and States of New York and Connecticut to develop and implement a Regional Habitat and Fisheries Management Plan, and providing assistance to the Fishers Island Water Utility as needed for ongoing protection of water supply and watershed.²³

Hamlet Report 2004

In 2004, at the recommendation of the Town's 2003 *Comprehensive Implementation Strategy*, the Town commissioned a set of "hamlet reports" for each of the unincorporated hamlets within the Town to

21 Harr, appendix, as quoted in Scopaz 2007, 5.14.
22 Town of Southold 2011, Section II-K-19.

23 Town of Southold 2011, Section V-63.

examine the urban structure of developed areas and farmland. Fishers was not initially included in this effort but at Islanders insistence, was added. However, this effort was not completed because the template established for the other hamlets did not fit will with the Island's issues. The Town later agreed to commission a comprehensive planning study for the Island, similar in scope to the Trust reports of the 1980s.

Fishers Island Strategic Plan 2007

The detailed 2007 *Fishers Island Strategic Plan 2007-2017*, prepared for the Town of Southold by Southold-based planning consultant Valerie M. Scopaz updates much of the database on the Island. Working through a series of public meetings and workshops, the plan provides a vision statement for the Island:

Fishers Island is an Island community that desires to maintain its unique lifestyle and character. The community's Vision for its future is an extension of its recent past, but with enhanced opportunities for a well-rounded existence within a setting of superlative environmental resources and community cohesiveness.

The Vision is for Fishers Island to continue to be a unique place where the existing quality of life is enhanced by ample social and educational opportunities, protection of our natural resources, sufficient economic activity and growth, and quality affordable housing to meet the needs of an expanded, but limited, year-round population.

The Island community's Vision includes a limit to the future expansion of the resort or summer-only population in conjunction with maintaining a more sustainable, year-round, residential community and lifestyle.

The Fishers Island community is keenly aware of the trade-offs they have made in exchange for the unique lifestyle they enjoy. By definition, Island life requires not just the virtues of self-reliance, strong community networks and civic spirit, it also

*requires a keen understanding of how to live within environmental and other constraints.*²⁴

The vision statement is followed up with concrete goals, objectives, and implementation strategies. The goals stated in this report reiterate the themes published in many of the previous plans, especially echoing almost verbatim the *Fishers Island Growth Plan* from 12 years earlier. Goals stated in the 2007 plan include:²⁵

- Develop an effective management and implementation protocol for Island administration by strengthening and supporting the Island Community Board (ICB) in this role.
- A sustainable year-round population of up to 500 people, and with sufficient diversity (in terms of age, sex and ability) to maintain a self-sufficient Island community.
- Good quality housing stock of sufficient quantity and variety to house the sustainable year-round target population.
- A sustainable economy geared towards providing satisfying, year-round local employment as well as providing the types of services and goods needed by a year-round population.
- A sustainable lifestyle through improved energy efficiency and affordability.
- An integrated transportation network [including but not limited to, roads, ferry, water-taxi, bicycle and walking paths, and the airfield] that supports the year-round community's need for reasonable access to services, goods, and economic opportunities.
- A cap on future increases in the resort, summer or tourist population on Fishers Island.

24 Scopaz 2007, 3.1

25 Scopaz, 3.1 – 3.6.

- Preservation of the natural environment, particularly fresh water wetlands, tidal marshes, woodlands, bluffs, dunes, beaches and warm season grasslands, against degradation or destruction.
- Protect Fishers Island's historic and unique cultural environment and its strong sense of place.
- Accommodate new growth and revitalize existing infrastructure in keeping with the Vision and Policies of the Local Waterfront Revitalization Program.

As in the 1988 / 1994 *Growth Plan*, these goals were accompanied by objectives which detailed the purpose of each goal, and in another chapter, by implementation strategies, which are too numerous and detailed to reprint here. While many of these strategies remain applicable today, the report lacks detail as to whose ultimate responsibility it is to implement them. An "Implementation Schedule" that was intended to address responsibilities and time-frames is referenced in the text, but evidently was never completed. Many of these strategies suggest that the Island Community Board should be the group doing the heavy lifting. However, as an unfunded, quasi-governmental entity, it is unclear how the ICB would have the authority or resources to accomplish many of these tasks. The plan was officially "accepted" by the Town of Southold but never "adopted" as an official governing document.

Chapter 5 of the Scopaz report contains a very useful and detailed Inventory of Island resources which does not require updating at this time. This chapter is incorporated here by reference.

Population Committee Report 2011

The Population Committee of the Island Community Board, which met from 2010-2011, produced an informal report consisting of collection of meeting minutes and slide decks. The committee prepared a detailed census of year round residents in order to get accurate

demographic analysis. Critical observations include that the overall population is aging (which will have a severe impact on critical Island services), that there is a real lack of 20-40 year old residents on the Island, while youth, especially at the youngest level is virtually nonexistent, indicating more challenges for the school ahead as these children come to school age. They also examined year-round housing, finding that 25% of year round residents live in the Walsh Park properties.

A number of strategies and initiatives related to attracting new population were discussed and tracked by the group. These included looking for new sites for housing and encouraging Walsh Park to move forward with new projects, requesting that the Ferry District take on the task of exploring redevelopment of the ferry landing area, developing new marketing materials for the school as part of an overall marketing strategy for the Island, thinking about an off-season educational institute and other job-creation possibilities and investigating issues with the internet.

Conclusion

Many of these planning projects resulted in concrete change—such as the development of the Island Community Center, development of Walsh Park affordable housing project, and the establishment of the Island Community Board. While these changes have had a positive impact on the community, especially in the area of open space and land preservation, the basic problems of sustainable, comprehensive management and population decline remain front and center. It is clear that without a coordinated and sustained effort to make change happen, and without a suitable structure to carry forth the work, the changes needed to reverse population decline, provide governance, management and decision-making structures and procedures, and generally improve the quality of year-round life on Fishers Island will not occur.



Plan Methodology, Concept and Implementation



Plan Methodology, Concept and Implementation

This community-based plan was developed over the course of 18 months with extensive consultation.

Planning for Fishers Island

This community based plan for Fishers Island, New York began in January 2012, when a group of eight Fishers Islanders, including both summer people and year round residents, visited Yale University to meet with Yale School of Management Professor Douglas Rae, and School of Architecture and Yale Urban Design Workshop faculty Alan Plattus and Andrei Harwell, to discuss some of the many challenges and problems facing the Fishers Island community today.

After a visit to the Island a couple of months later in March, the Yale Urban Design Workshop, a community design center affiliated with the Yale School of Architecture, was retained by the Island Community Board to conduct a public process on the Island and prepare a comprehensive plan that could address the community's complex needs. This was followed by a sequence of visits to the Island, individual meetings, presentations, and work sessions over the course of spring and summer. During this process the YUDW interviewed representatives of all of the tax districts, many of the community institutions on the Island, the school, Utility Company, FIDCO, the clubs, year round residents and summer residents, recording not just concerns and frustrations, but also the communities ideas about how things could be made better, stumbling blocks, and strategies for implementing change. This culminated in the first public meeting of the project in July 2012 where the team presented its preliminary assessment of what was happening on the Island. This was followed by additional public meetings in August and November.

Over the winter and spring of 2013, the YUDW began a period of intensive research, during which YUDW staff review of the last 30 years of plans prepared for the Island (summarized above in the section "Previous Plans"), and prepared base mapping information for the Island from GIS data (finally received after a lengthy and time consuming request process from the Town of Southold and Suffolk County), and began to develop the "Wrightville" Concept for the fort area of the Island, presented first at a public meeting on the Island in March 2013.



ISLAND COMMUNITY BOARD

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DISTRICT

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...mmissioners of the Fishers Island Ferry
...2012 at the Fishers Island Fire House,
...lection of one Commissioner as follows

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Board of Commissioners
Fishers Island Ferry District

By: Robert R. Brooks, II
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...AME OF A CANDIDATE ON THE
...ISLAND FERRY DISTRICT MAY BE
...ISHERS ISLAND FERRY DISTRICT,
...JULY 5, 2012. SAID PETITIONS MUST
...HE FISHERS ISLAND FERRY DISTRICT,
...12:00 NOON, FRIDAY, JULY 20, 2012.

...A RESIDENT WHO IS QUALIFIED TO
...SOUTHOLD, NEW YORK AND OWNS
...HERS ISLAND FERRY DISTRICT
...N ASSESSMENT ROLL. PETITIONS
...AL PROPERTY AND BE NOTARIZED.

(FYI)²

The Yale Urban Design Group that has been retained by The Island Community Board will be here this coming Thursday and Friday. There will be a public presentation of progress to date at the Community Center on Friday at 10:00 am. All are welcome.

This project has been dubbed:
(FYI)²standing for:

For Your Information Fishers Yale Initiative



During the summer of 2013, the YUDW team began to develop visual materials illustrating the “Wrightville” concept, including conceptual plans and renderings, and began to write the first draft of the report, sections of which were circulated to specific affected stakeholders for input beginning in July 2013, with a final first draft completed in December 2013. In February 2014, the draft was circulated for comment with the Island Community Board, and the revised report issued for public review via the Fishers Island Website in mid-March 2014.

Plan Concept: Three Strategies

This plan consist of three primary strategies, presented in detail in the following three chapters of this report, each of which address and describes specific responses to the issues and problems identified during the extensive discovery phase of the project.

The first, presented in the chapter IV, “*Wrightville*” *West End Village* is the redevelopment of the Fort HG Wright area of the Island as “Wrightville,” a mixed use and residential, walkable, transit oriented, creative industry village, built on the structure and architecture of the former military base. Redevelopment of this area has the potential to physically address many of the challenges of year-round life on the Island, including education, housing, jobs, recreation, culture, and transportation, while creating a vibrant, distinctive and imagable gateway to the Fishers Island.

The second part of this plan includes specific improvements to Island infrastructure necessary to support year-round residents, including ferry service, internet service, and utilities. These recommendations may be found in Chapter V, *Improving Infrastructure*.

The third, and perhaps most important part of this plan is a governance and management strategy

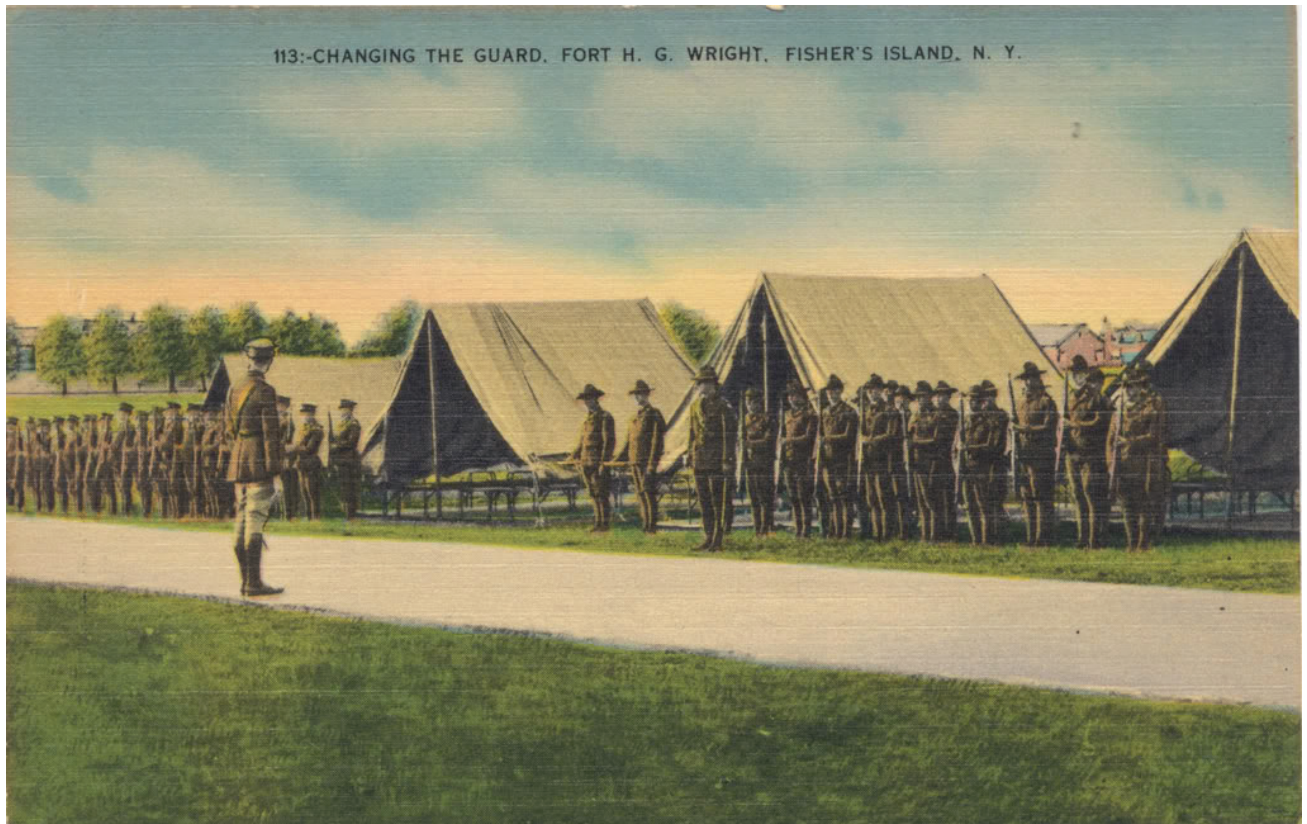
that will allow the Island to determine its own fate, and to take on many of the other recommendations of this plan. Chapter VI, *Getting it Done: Governance and Finance*, addresses establishment of an incorporated Village of Fishers Island, including modeling what that government might look like, its costs, and the effect of those cost on Fishers Island property tax payers.

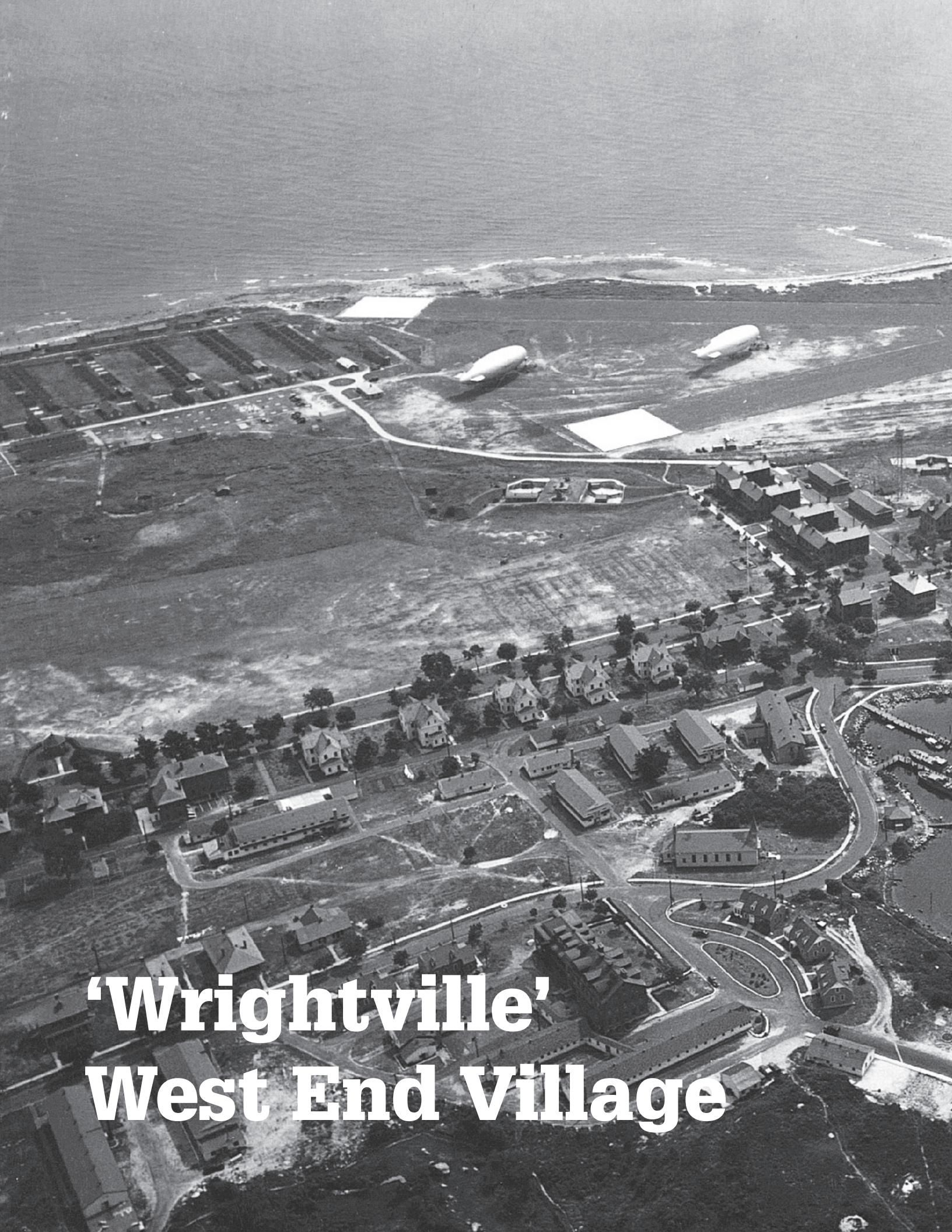
Implementation: An Integrated Approach

It is possible that each of the recommendations of this report, taken separately, could be executed over time through a combination of private donations and volunteerism, as has happened with many Island initiatives in the past. But when taken individually, any one of these recommendations will not be sufficient to address the current year-round population crisis. New housing alone, or a change in the ferry schedule alone, without the potential for new jobs, or without improved internet service, might produce some modest return on investment, but to reverse the outflow of year round residents and stabilize the population requires that these recommendations be accomplished together and managed as a group.

Today, there is no structure enabled to manage this kind of process on the Island. To truly address today’s needs, the Island must develop some kind of coordinated management structure, empowered to think comprehensively about the Island’s problems and future, plan accordingly, and budget appropriately to deal with them. Various options for Island management have been discussed during this process, including Community Development Corporations, Business Improvement Districts, even seceding from Southold or New York State altogether. But at this time it appears the Village Incorporation, with the flexible, small scale local government that comes with it, offers the best possibility for achieving the community’s goals.

113:-CHANGING THE GUARD, FORT H. G. WRIGHT, FISHER'S ISLAND, N. Y.





‘Wrightville’ West End Village



'Wrightville' West End Village

**A redeveloped
"Wrightville"
could address
many of Fishers
Island's critical
needs.**

Village Structure

[There are] several obstacles to bringing people to the Island on a full time basis...: high property taxes, the diminishing pool of moderately priced housing and rental space, lack of commercial space, high utility rates for businesses, an accommodating but not always efficient ferry freight system, the seasonal only nature of cultural events and activities, the absence of a formal day care and the high cost and declining number of Island students at the school.

—Fishers Island Growth Plan 1994¹

The Town of Southold has identified the former Fort Wright area and Silver Eel Pond as an underutilized area. This area includes a significant collection of abandoned military buildings that could be redeveloped to provide year-round jobs and/or affordable housing.

—Local Waterfront Revitalization Plan 2011²

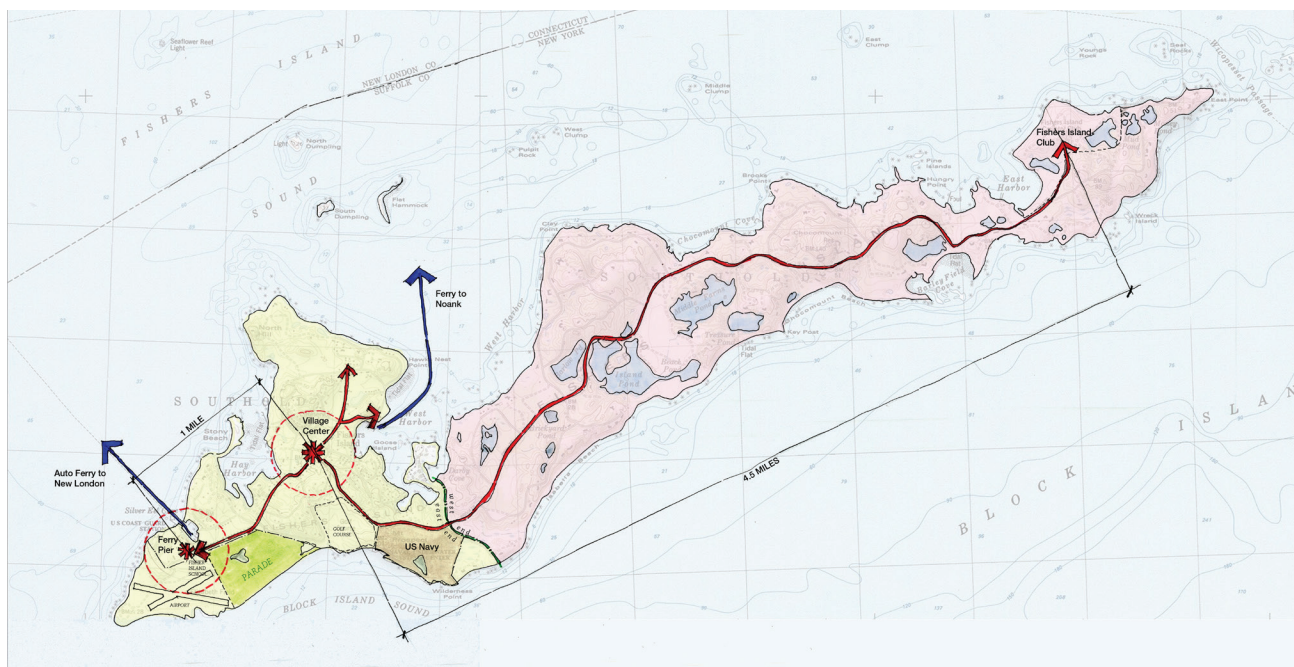
Many of the improvements needed to attract and sustain a more robust year round population on Fishers Island can be accommodated through the redevelopment of the former Fort H.G. Wright area as a mixed-use and residential Island village. Conversion of the former military infrastructure and buildings of the fort to a functional, attractive and productive part of Fishers Island remains incomplete, despite the fact that 65 years have elapsed since the base closed. As far as we can tell, a clear and coordinated effort to think about the opportunities presented by redevelopment of this area has not been enacted, perhaps due to circumstances highlighted elsewhere in this report, especially the remoteness of governance and land use control resulting in a lack of comprehensive physical planning. Incremental developments have had an impact on the area—some positive, such as the successful Island Community Center on Hound Lane, and some negative, such as the use of the former military artillery batteries as a waste and recycling transfer

AERIAL VIEW OF FORT H.G. WRIGHT (opposite, top) shows the compact form of the former base - naturally walkable and transit-oriented.

BI-NUCLEAR STRUCTURE OF FISHERS ISLAND (opposite, below): Fishers Island has two primary nodes of activity around which cluster more public and commercial uses - the fort area and the village green, approximately 1 mile apart.

1 Fishers Island Civic Association 1994, 2.

2 Town of Southold 2011, Section II-J Reach 10-38.





***BASE CONVERSION PROJECTS** San Francisco's Presidio (top left and right, lower left) draws together military heritage preservation managed as a national park with commercial development, adaptive reuse of former industrial structures, and recreation opportunities to produce a*

distinctive place. At the Glen Town Center, the former control tower of Glenwood Naval Air Station provides the focal point for new commercial and mixed use buildings (lower right).

station. In general, the area today is characterized by episodes of positive infrastructure, some attractive and robust buildings, weakly connected and filled in by zones of neglect or even blight. But there is enormous potential for the area to become a transit- and pedestrian-oriented village for the Island, building on the former fort's layout and physical remnants, as other recent 'base conversion' projects have, like San Francisco's Presidio, the Glen, formerly Glenwood Naval Air Station in Illinois, or the Watertown Arsenal in Massachusetts³. The Island's military heritage assets, when combined with the proximity of the

school, ferry, and Island Community Center, can provide a physical framework within which to address many of the Islands needs while producing a special, distinctive place linked to local history and the landscape of the Island.

Fort H.G. Wright was itself, for many years, a cohesive, compact, mixed use, transit- and pedestrian-oriented town with a substantial population. At its height during World War I, there were more than 1,500 people living in the fort, with work and amenities all within walking distance of residences. The fort's compact form resulted from the need for all parts to be easily accessible on foot (like a college campus), while its layout and the distribution of its parts resulted from functional requirements for views, protection, and access, adapted to the dramatic landscape of the site.

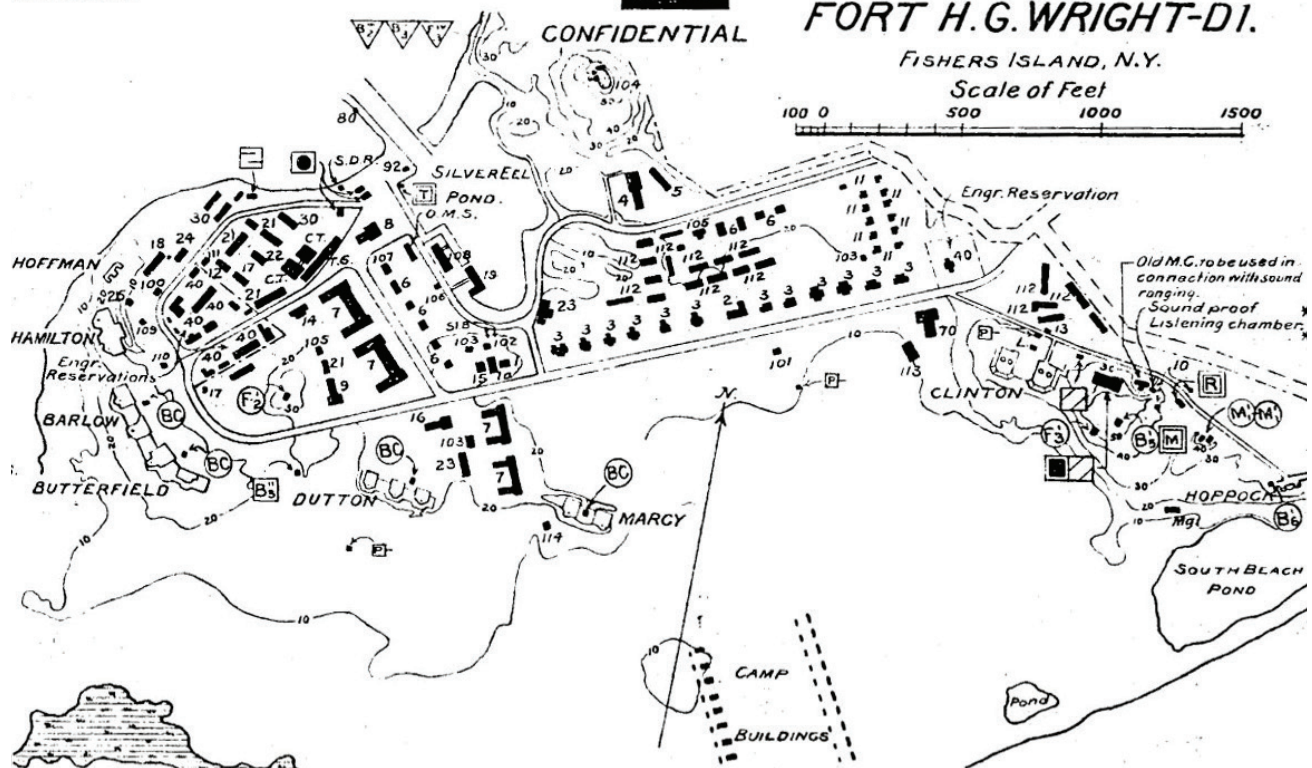
³ For guidance on community based base conversion projects, see Turning Bases Into Great Places: New Life for Closed Military Facilities, published by the US Environmental Protection Agency in January 2006, available online at http://www.epa.gov/livability/pdf/bases_into_places.pdf

FORT H.G. WRIGHT-DI.

FISHERS ISLAND, N.Y.

Scale of Feet

100 0 500 1000 1500



MAP OF FORT H.G. WRIGHT shows the principal buildings of the military base.

The fort was arranged in several zones arrayed around Silver Eel Pond, where, as today, ships came in to supply men and goods. To the west of the pond, in a naturally sheltered area between the pond and a ridge that runs in an arc south and east along Fox Lane, were the primary working buildings of the Fort—the center of activity and the “downtown” in some sense—this area included both the industrial buildings like ordnance storage, garages, wagon sheds, and shops, as well as the more domestic and recreational functions of the fort—the post exchange, dining hall, bakery, and band headquarters. The ridge to the west, which afforded clear views of Long Island Sound across the tip of the Island to the south and west, was a perfect site for a chain of long-range artillery guns guarding entry to the Sound—Batteries Hoffman, Hamilton, Barlow, Butterfield, Dutton, and at the west edge of the Parade, Marcy, were dramatically embedded in the landscape.

South and just west of Silver Eel Pond was a residential neighborhood consisting of detached officers housing along Greenwood Road (for NCOs), and Whistler Avenue, where higher ranking officers had dramatic views of the parade grounds across the street where military exercises were performed. Barracks occupied the west side of Greenwood Road, and also defined the west edge of the Parade, along Schmidt Road. Beyond these was the airfield, used for blimps and more conventional aircraft. At the east edge of the Parade were two more gun batteries – Clinton and Hoppock, and beyond them, the boundary of the fort.

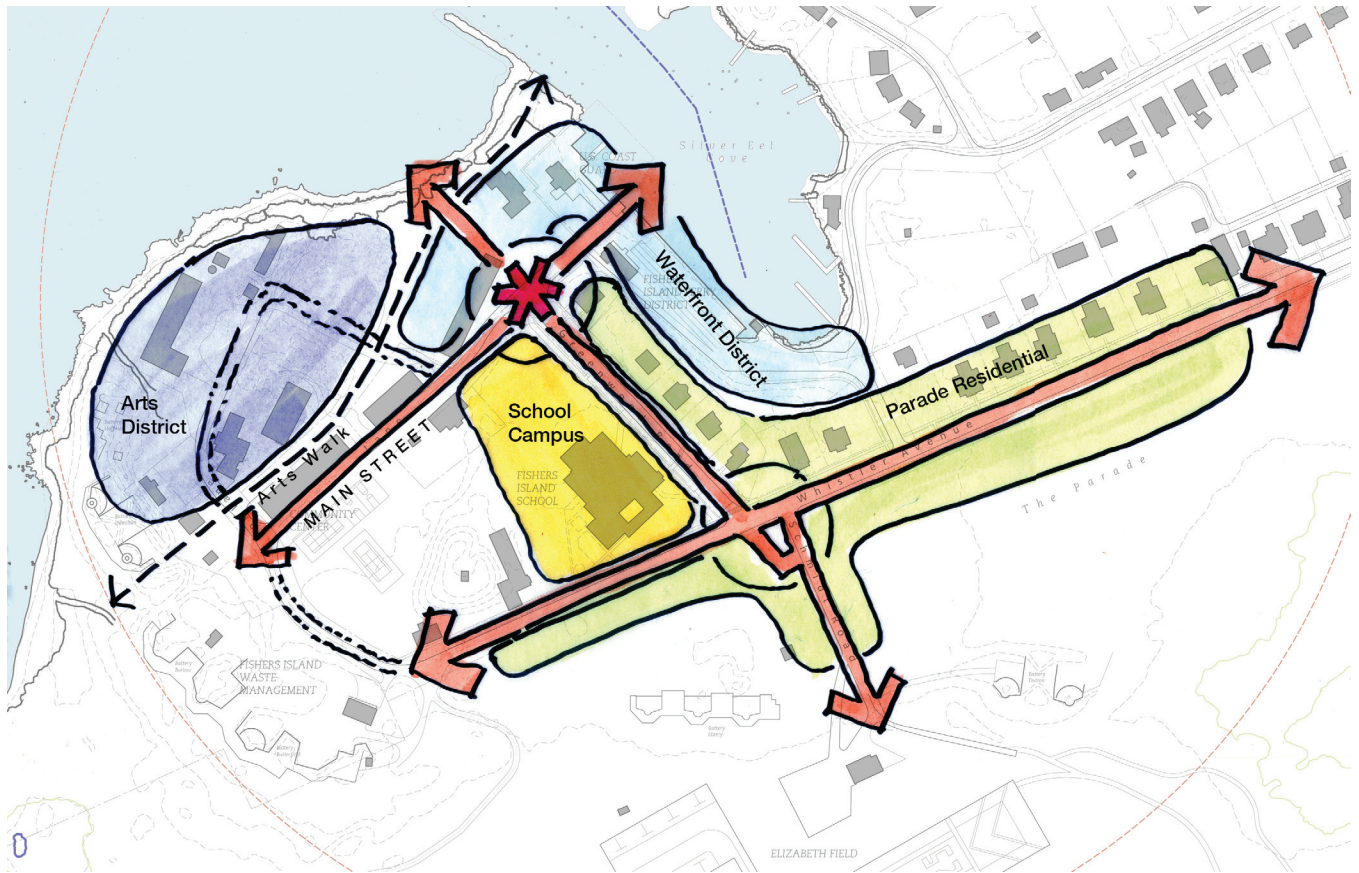
East of Silver Eel Pond was the hospital, and at the top of the hill, the reservoir providing drinking water to the Fort.



WRIGHTVILLE PLAN. *Redevelopment of the fort area might include the following elements. Blue indicates development on privately owned parcels, while orange indicates town owned parcels. 1. New Gateway Square with “disappearing gun” monument; 2. Adaptive reuse of existing freight building as ground floor commercial and upper floor live work; 3. New buildings with ground floor commercial and upper floor flex (live work or commercial); 4. Reorganized central parking lot with pervious pavers, saltwater tolerant bioswales to eliminate storm water runoff into Long Island Sound; 5. Adaptive reuse of old fort Bakery as restaurant or artists work center; 6. Arts Walk, connecting ferry area to trails; 7. New loft building with ground floor commercial and live-work above; 8. Former ordnance building reused as art hotel or live work; 9. Proposed tiny house development; 10. Former gun emplacements preserved and interpreted, possible use as performance venue; 11. New trail system connecting from arts walk up to gun emplacements, out to landscape, and around the Island to the Parade; 12. Off the grid cabins for artists-in-residence; 13. New family and workforce housing micro neighborhood*

Architecturally, the fort was characterized by robust, attractive, red brick buildings ranging from the distinctive houses that still stand along Whistler Avenue and Greenwood Road, to characteristically austere industrial buildings, such as the ones that still stand west of the ferry landing, to the massive and monolithic architecture of the gun batteries themselves, with their underground rooms and crescent shaped pads.

While many of the fort’s buildings have been demolished in the last 65 years, some still stand, and the overall spatial structure of the fort-as-town remains intact and can be built upon. In relation to the current planning effort and its goals, the under-developed Fort area presents an incredible opportunity to address many aspects of the ongoing challenge of attracting and retaining year round population. Housing, business and



WRIGHTVILLE URBAN DIAGRAM illustrating zones of activity, connections, and the gateway node in the fort area.

job creation, the school, the ferry, recreation, and community development can all be addressed and tied together through interventions and improvements to this area, while benefitting the entire population of Fishers by providing a new, attractive gateway to the Island.

In support of this goal, the fort area of the Island should be redeveloped over time as a mixed-use and residential village. A reconfigured and enhanced “Wrightville” west end village might look something like the aerial rendering presented on the next page, building on existing strengths, trends, and infrastructure in the area. Hound Lane, home to the Island Community Center could begin to act as a “main street” for the area, with a new public square at the corner of Greenwood Road anchoring modest commercial development and serving as a much-needed Island gateway

from the ferry landing⁴. This new square would connect to a more efficient and attractive central parking area to the north which would serve commuters, residents and patrons of the village area. Building on the nascent arts scene already present in the area, and strong interest in the community to draw more artists to the Island, development north of Hound Lane could be themed about creating an “arts district.” This could include new and renovated live work space for artists, a gallery, and an “arts walk” which would connect from the overlook point above the Coast Guard Station, through the parking area, along the back side of the community center, and finally up the hill to the west between Battery

⁴ Hound Lane is not currently a mapped street, but instead part of the Island Community Center’s parcel. After incorporation, Hound Lane should be acquired by the Village and be made a real street.



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EXISTING

- a. Ferry landing, connection to New London, CT
- b. United States Coast Guard facility
- c. Ferry Annex (including artists studios)
- d. Fishers Island School (K-12)
- e. Todd Williams Billie Tsien studio residence in renovated base building
- f. Fishers Island Community Center, Cafe and Health Club in renovated base building
- h. The Parade
- j. Elizabeth Field (airport)
- k. Fishers Island Sound
- m. Silver Eel Cove
- n. Existing Industrial

PROPOSED

- 1. New Gateway Square with "disappearing gun" monument
- 2. Adaptive reuse of existing freight building as ground floor commercial and upper floor live work
- 3. New buildings with ground floor commercial and upper floor flex (live work or commercial)
- 4. Reorganized central parking lot with pervious pavers, saltwater tolerant bioswales to eliminate storm water runoff into Long Island Sound
- 5. Adaptive reuse of old fort Bakery as restaurant or artists work center
- 6. Arts Walk, connecting ferry area to trails
- 7. New loft building with ground floor commercial and live-work above
- 8. Former ordnance building reused as art hotel or live work
- 9. Proposed tiny house development
- 10. Former gun emplacements preserved and interpreted, possible use as performance venue
- 11. New trail system connecting from arts walk up to gun emplacements, out to landscape, and around the Island to the Parade.
- 12. Off the grid cabins for artists-in-residence
- 13. New family and workforce housing micro neighborhood

Hamilton and Battery Barlow where hikers are rewarded with dramatic views of the ocean and landscape. Beyond these batteries, a collection of tiny, off-the-grid cottages for artists participating in the Lighthouse Works fellowship could connect to a new set of cycling and hiking trails that would make the coast, landscape, and military ruins accessible.

South of this, the parade residential neighborhood comprised of Greenwood Road and Whistler Avenue could be extended south along Schmidt Road, creating a family-oriented micro-neighborhood anchored by its own small public square. Within walking distance of the school, ferry and other facilities, this would be an attractive area for many full year residents. The opposite side of the parade, adjacent to the old army cinema, could be anchored by a new 15-30 room Inn serving corporate board retreats, visitors, or family events. The Parade itself, and the dramatic views across it to the open ocean, could be framed and preserved by this carefully sited and designed new, but limited development.

The new west end village should not supplant the traditional Village Green as the primary commercial district on the Island. In fact, development within the Fort area should, insofar as possible, support, and not compete with existing, established businesses on the green. In this unique bi-nuclear village structure, each center will have its own distinct character: The fort area characterized by transit-oriented uses, professional offices, startup businesses, and arts-related uses (which do not currently exist or have a place elsewhere on the Island) and the Village Green, with its small scale shops and public uses. Better connections for pedestrians and cyclists should be made between these centers.

Infrastructure

In general, the fort area appears to have existing infrastructure capable of handling limited increased development as described here, including new residences and small businesses.

Excess electrical and water capacity are described in previous reports.

The fort area is the only place on the Island currently served by a community septic system. According to the *Town of Southold Local Waterfront Revitalization Program*, in 1986 a new sewage treatment system was installed in the fort area to eliminate discharge to surface waters. The report calculates that, assuming a flow of 100 gallons per capita, per day, this system can accommodate a maximum population of 200 persons, a 30% increase from the current population⁵. The Fishers Island School is not connected to this system.

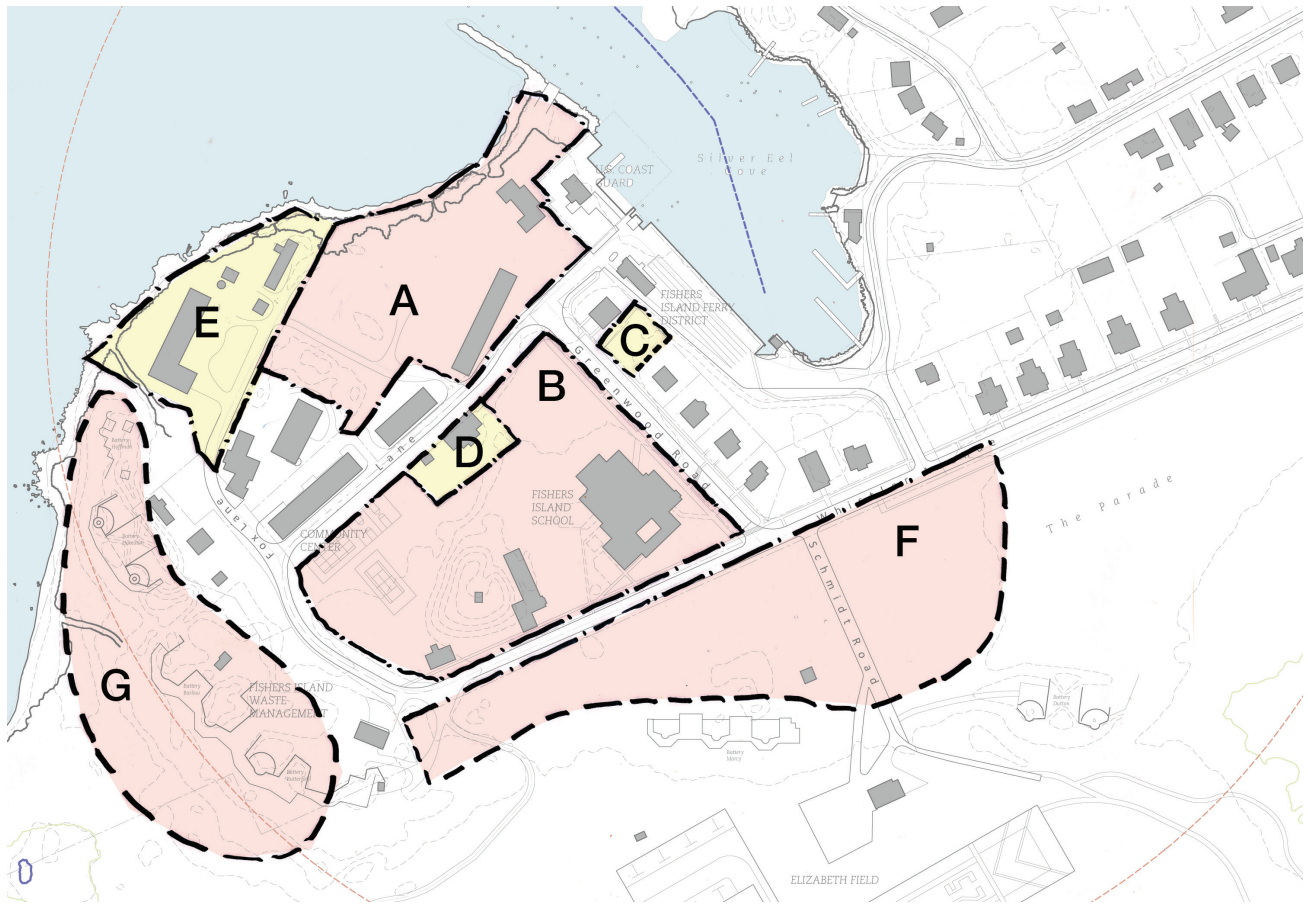
It is important to note that upgrades may be required to water force mains, telephone and power distribution systems, or sewer piping, but detailed analysis of existing systems is beyond the scope of this study⁶. According to the Fishers Island Utility Company, complete data regarding the condition of distribution systems on the Island is incomplete. A GIS (Geographic Information System) mapping project, currently being pursued by the Company, would provide a much more robust picture of the state of infrastructure not just in the fort area, but throughout the Island.

Opportunity sites

The image opposite indicates opportunity sites which are currently under-performing and could be redeveloped to accommodate new uses. Many of these sites are already owned by the Town and managed by the Ferry District—these include zones coded in pink: A, currently used as an *ad hoc* parking area and industrial yard, B, owned and controlled by the School District, F, Part of the

5 Town of Southold 2011, Section II-J Reach 10-35.

6 Anecdotal evidence provided by some Island residents suggests that the water distribution system is in need of thorough review and possible reconstruction. One resident reported 9 water main breaks in the east part of the Island during a recent calendar year. Of particular concern may be that some fire hydrants have insufficient water pressure or volume to effectively fight a fire.



OPPORTUNITY SITES owned by the town are shown in pink, while those privately owned are shown in yellow. A. Existing surface parking lot Ferry Annex and Freight Building, B. Fishers Island School property, C. Open lot

parcel containing the Parade and Airport, and G, also part of the same parcel. Site D is currently on the market and available for redevelopment. Site C was once the site of a house and now belongs to an adjacent owner, and E is a privately held property currently being used for industrial purposes.

Not indicated on this plan is the parcel currently owned by the US Navy and used as part of the Naval Undersea Warfare Center. While there do not appear to be any near term plans to de-accession this property by the Navy, its status should be monitored going forward, and contingency plans made in case it does become available. The property should likely be preserved as an open space resource for the Island, perhaps in combination with a public use.

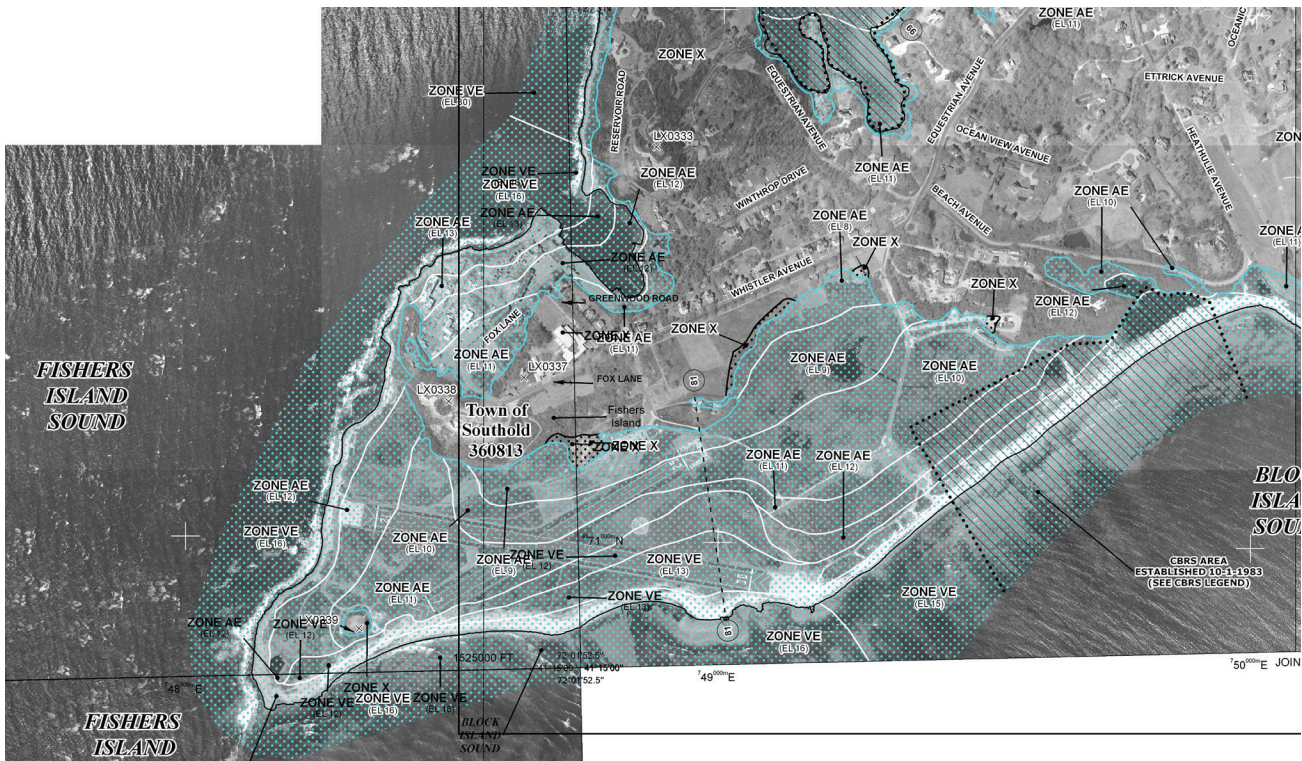
Open space

Concentrating development activities within the Wrightville area should be coordinated with the permanent protection of important historic and scenic open spaces, which contribute to the overall character and livability of the Island. Coordinated improvements should be made in these areas to improve accessibility and recreational opportunities for hikers and cyclists while protecting fragile natural ecosystems and military heritage sites. These include most importantly the historic Parade, south of Whistler Avenue, including the remains of the former military Battery Dutton and the National Guard encampment, as well as the open area at the east end of the Island beyond the ridge west of the Island Community Center, including the eastern ring of military batteries (Hoffman, Hamilton, Barlow and Butterfield) and the area



OPPORTUNITIES FOR REDEVELOPMENT. Industrial buildings formerly associated with the fort could be redeveloped to live-work, commercial, residential, or hospitality use.

FEMA FLOOD MAP. (below) any redevelopment of the Fort Wright area must be undertaken with an understanding of potential flood conditions and best practices followed. This may require that new buildings be constructed with first floor levels above the base flood elevation for their zone, with raised front porches and ramps / stairs to provide access, like the Island Community Center building does. No residential uses should be constructed on the first floor of buildings within the flood plain.



beyond runway 12 of Elizabeth Field. Both of these areas include sensitive grasslands and wetland ecosystems, beach-front, and dramatic views out to Long Island Sound. If Elizabeth Field were ever to be closed, the area occupied by the airport should also revert to protected open space, connecting the Parade to the east tip of the Island as a continuous open area. Open space should be preserved through the Ferguson Museum Land Trust and through conservation easements, as suggested in many previous reports. After incorporation, a land transfer tax might be used to create a public land trust.

Traffic and parking

Putting the majority of new residential and commercial development within the Wrightville area, in a compact, pedestrian friendly form, adjacent to the ferry, school, and other amenities will mitigate any new development's impact on Island traffic. The area will function as a transit oriented development (TOD), allowing easy access for residents to the ferry, and for Island visitors to arts- and hospitality- related uses on the Island. The existing parking area at the end of Fox Lane will provide parking for new commercial, arts, hospitality, and residential uses in the Wrightville area, as well as for walk on access to the ferry. Reconstruction of the parking lot could make it a more efficient and attractive area, and sustainable design features integrated into the parking lot, such as pervious pavers, saltwater-tolerant bioswales, sand traps, and on-site storm water retention can mitigate the negative environmental impact of the parking lot on Fishers Island Sound.

Industrial Uses

Redeveloping the Wrightville area will require the relocation of some of the incompatible industrial uses currently located in the fort area to other locations. The area west of the Parade around Battery Clinton could be an appropriate location for industrial development. The Waste Management district currently controls much of this area, and could consolidate its transfer station out of the fort area to this site, allowing for the clean-up and

redevelopment of its current site along Fox Lane. A number of Islanders we spoke to suggested the need for warehouse-type space that could be leased to multiple tenants doing construction and landscaping on the Island – a facility of this type could also be located in this area to serve the whole Island. Clearly any industrial development in this zone would need to be carefully planned, appropriately landscaped and screened to be invisible to open space and residential areas adjacent, sited so as not to obstruct existing view-sheds, and constructed with appropriate sustainable building features to mitigate any damage to the adjacent environment.

Costs of Public Improvements

Projecting the costs of public improvements suggested here may have limited utility and limited accuracy in light of the level of detail provided by this study, but may provide at least an understanding of the magnitude of the undertaking proposed. Neither detailed review of site conditions nor detailed technical design has been undertaken as part of this planning project. In addition, the costs provided below are subject market forces and escalation over time.

Improved Parking Lot: construction costs for surface parking lots with sustainable features as described above can be projected at between \$2,500 and \$3,000 per parking space, including circulation space and general landscaping. The lot indicated here has space for 105 cars, for a total cost of between \$262,500 and \$315,000. Cost of financing might be offset by requiring residents to purchase parking permits annually or charging daily rates for those leaving their cars at the dock. This might also encourage Islanders to cycle or walk to the ferry instead of driving.

Gateway Square: Without detailed design it is not possible to make a precise estimate for what this project might cost - choices of paving material, curb type, landscaping, and public art will have a big impact on cost of this space. However, two recent intersection reconstructions in New Haven,

Connecticut of a similar size with similar features to those proposed here may be a good indication of the potential cost, exclusive of public art. These include the reconstruction of the intersection of West Park Avenue and Elm Street which included granite curbs, extensive striping and a

Recommendations

- Establish a clear west end village structure in the former fort area of the Island, that coordinates and connects new housing, job creation, education, transportation, and open space in a sustainable and appropriate manner.
- Develop Hound Lane as a west end village main street, linking the ferry landing to the Island Community Center. After Village Incorporation, acquire Hound Lane and make it a true public street.
- Develop a new gateway to the Island by creating a village square at the corner of Hound Lane and Greenwood Road. Consider incorporating a gateway element from the military history of the Island, such as a disappearing gun monument.
- Reconstruct and rationalize the central parking lot adjacent to the ferry landing. Include attractive sustainable design features, such as pervious paving and bioswales to mitigate the parking lot's impact on Fishers Island Sound's water quality. Include pedestrian pathways and appropriate lighting.
- Protect open space, view corridors and environmentally sensitive areas conservation areas and easements, re-zoning as needed, and a clear plan establishing both opportunities and limits for development.
- Consider establishing a local development corporation (LDC) to initiate and develop projects proposed by this plan on the Island, such as new housing, space for businesses and the arts.

new roundabout with textured paving, and cost \$225,000, and a speed table with a similar level of finish installed at Edwards Street and Livingston Street for around \$310,000. Both of these projects included repaving of the intersections as well as reconstruction of sidewalks, and part of their cost was related to road improvements that would have been performed anyway in due course. Construction of the gateway square project on Fishers could coincide with general maintenance to the surrounding streets as well.

Housing

Lack of affordable, appropriate year round housing may be the foremost challenge to stabilizing and growing the year round population of Fishers Island. This impacts a wide range of current and future Islanders - for those who want to make the Island their home in the long term and raise a family there, finding appropriate home-ownership units presents a challenge. For those wishing to move to the Island, year-round rentals that might allow them to "try before you buy" are scarce. Children of long-time Fishers year round families who wish to remain on the Island after "leaving the nest" have limited options for starter homes, and at the other end of the spectrum, elderly Islanders wishing to downsize to reduce their costs also have few options available to them.

Over time, an increasing amount of the Island's real estate has slipped into the seasonal vacation rental market, driving up real estate values, and reducing availability for year round residents. For some year round residents, the highly successful housing provided by the Walsh Park Benevolent Corporation, an Island nonprofit, has provided long term, comfortable housing. Over time there has been little turnover as its residents have aged in place – and with no stock of housing elsewhere on the Island to downsize to as their children grew up, they cannot move to make way for the next generation of young Island families.



SCHMIDT ROAD HOUSING

Flexible, year round housing is one of the most pressing needs on the Island, and a variety of new residential types and sizes could be provided within the former fort area.

Schmidt Road, formerly home to two large barracks building, is an ideal location for the development of a stock of new detached or semi-detached houses, mixed with small multi-unit buildings. Being part of a walkable neighborhood, and in close proximity to the School, Parade, Ferry and Island Community Center, could be especially attractive amenities for families, commuters, teachers, and those with home based businesses, among others.

Any new housing along Schmidt road should strive to be architecturally compatible with not only the neighboring historic architecture of the parade, but also the stunning Island landscape, and care should be taken that these new houses add up to a small village neighborhood, not a suburban site. To make Schmidt Road a distinctive residential street on the Island, care will need to be taken to orient buildings toward the street in the way

they are along Whistler Avenue, and the public street-scape made attractive through the use of lighting, landscaping and paving appropriate to Fishers. Front yards can provide an attractive buffer between Schmidt Road and the houses, and parking provided off-street in individual driveways. A new square at the end of Schmidt Road where it ties into Whistler Avenue will provide an attractive entry into the development.

Houses along the edge of the Parade should take advantage of stunning views across the Island to the Sea with large eastward facing glazing and exterior balcony space, but should be buffered from the public space of the Parade. Raised rear yards that are terraced above the Parade, and fencing, hedgerows and landscaping could provide this buffer, giving the houses an intimate private space on the Parade side. In addition to providing a buffer for private residents, these houses will better define the edge of the Parade as it originally was when the barracks stood there.

New housing along Schmidt road will expand the residential population of the fort area and provide a sense of community for those who live there.

This plan proposes that a coordinated effort should be made to provide new housing concentrated in the fort area in support of the “Wrightville” village concept. This compact area currently includes many attractive neighborhood amenities within easy walking distance, including the Fishers Island School, Island Community Center with its athletic courts and fitness center, and the ferry. Other improvements proposed elsewhere in this report, such as an arts district, new commercial and artist’s space, and a trail system connecting the parade, military ruins and shoreline would further enhance this area, making it even more attractive to those wishing to live on the Island.

New housing needs to satisfy a range of market demands and should therefore take on a variety of physical forms and ownership types, including rental apartments, condos or coops, live-work space, and single family or semi-detached houses. As a principle, the physical form and placement of new housing constructed in this area should support the village concept and be architecturally and urbanistically sympathetic to the historical military and industrial architecture of the fort, as well as the surrounding landscape. This is

not to prescribe that they be historicist in style, but instead that they respect the context of their particular sites – by being generally street facing, village-like instead of suburban, of appropriate village scale and density, and contribute to the feel and character of a small neighborhood.

Sustainable design elements, including superinsulation, high performance glazing, passive heating, cooling and ventilation, solar energy, low-irrigation landscaping or xeriscaping, and on-site storm water management should be deployed to the greatest extent possible in new housing and neighborhood infrastructure – to reduce annual energy consumption and therefore cost of living for residents, to improve health and comfort of residents, and to protect the natural environment of the Island.

This report identifies, in a preliminary way, a number of sites which could potentially be developed as housing, and these are described below in greater detail and illustrated by the aerial view shown on page 50-51 and plan on page 48.

One particularly promising location for a new



pocket of housing is along the Schmidt Road at the south edge of the Parade, on the site of the former military barracks. This is currently part of the town-owned parcel containing the Parade and Elizabeth Field. This site could support a small cluster of mixed semi-detached or detached, 2 story, rental or home-ownership, 2-3 bedroom family houses. These houses could create a small family-oriented residential cluster, defining and attached to the south edge of the parade, much like the original army barracks did, while making Schmidt Road an extension of Greenwood Road. A small square at the intersection of Schmidt Road and Whistler Avenue could anchor the neighborhood and give a sense of community to the development, while individual rear gardens could mediate between the houses and the landscape beyond and provide private outdoor space. Care would need to be taken not to block the views of those living on Whistler Avenue. Further investigation is required to determine whether FAA restrictions on the airport might impact development in this zone.

As part of a new village gateway area at the intersection of Greenwood Road and Hound Lane, new mixed use buildings and adaptive reuse of existing historic buildings might contain 1 – 2 bedroom apartments or live-work lofts on the second floor in combination with ground level commercial space. The former ordnance building on Fox lane is also a prime candidate for conversion to live-work loft housing for artists or those with home based businesses. Finally a new building at the west edge of the parking area between Fox Lane and Hound Lane could also accommodate 2nd floor apartments over commercial space.

Construction of these units should be phased in over time to avoid market saturation.

In the case of most of these opportunity sites, current zoning will need to be modified. More detailed engineering study is also necessary to determine whether additional sewer capacity

needs to be provided by expanding the sewage treatment facilities and mains, and whether the existing water supply is sufficient.

Consideration should be given as to whether any new units should be constructed and subsidized as income-sensitive (i.e. "affordable housing").

Management strategies should be developed to assure that new housing remains in the year-round market. One solution might include deed restrictions of for-sale units or restrictive zoning that do not allow short term seasonal rentals.

New year round housing in the fort area could be delivered through a combination of development mechanisms.

Given their proven track record on the Island, Walsh Park could take a lead role in the development and management of some of this new housing stock. One major advantage of Walsh is that they could begin on new projects immediately, and they know the process and challenges of working on the Island, and would have the knowledge to negotiate them.

A second option would be for Fishers to establish a non-profit local development corporation (LDC) with a professional executive director and staff. Even if the Island was unable to incorporate as a village, an LDC could act as a *de facto* planning and development agency for the Island, applying for grants and other funding, interfacing with the Town of Southold, buying land from private owners or receiving land from the town, borrowing funds or issuing bonds, and would have the potential to do a number of management jobs on the Island normally performed by government. Some local development corporations also receive government funding through taxes.

After incorporation, another available option would be for the Village government to develop more detailed plans and specifications for particular parcels or areas, and issue an RFP for private developers.

LOCAL DEVELOPMENT CORPORATIONS

Local development corporations (LDCs) are private not-for-profit corporations which are often created for the benefit of local governments for economic development or other public purposes. They may act as quasi-public development agencies, acquiring, developing and managing projects which are in the public interest. They are not subject to the same kinds of statutory provisions that local governments are subject to, such as limitations on debt, referendum requirements, or competitive bidding.

LDCs can acquire property through gift, purchase or lease. A special power of LDCs is that they can receive property from a municipality without the municipality going through a competitive bid process required of other private entities. They may develop or dispose of this property without incumbrance.

LDCs can issue negotiable bonds, notes and other obligations, and can issue tax-exempt bonds for eligible tax-exempt projects. These include Industrial Development Bonds which can support construction of manufacturing or commercial facilities, and Civic Facility Bonds, which are sold on behalf of non-profit, 501 (c) 3 organizations, such as schools, charitable groups, cultural institutions, etc.

LDCs also have special tax exemptions under some circumstances, including exemption from real property taxes, exemption from sales tax on construction materials purchased with bond proceeds, and exemption from mortgage recording tax.

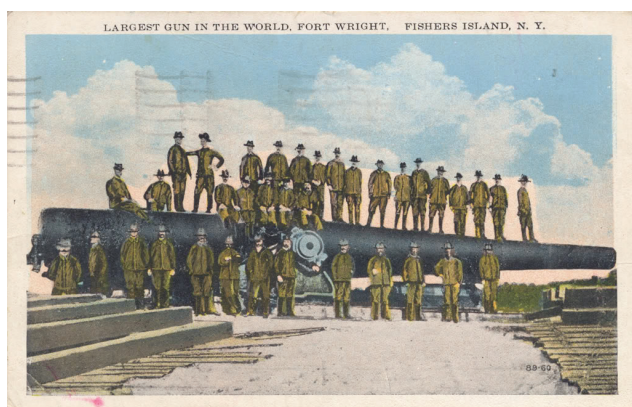
It might also be possible to fund some of the public costs related to the development of this housing through either a real estate transfer tax, or through a hotel tax that would be charged on Island rentals.

These are not mutually exclusive strategies, and could be deployed in combination for the development and management of different parts and stages of the project. It is, however, essential to ground all new development in the village in a comprehensive plan, with thoughtful and coordinated infrastructure and streetscape treatment to enhance the character and performance of the village, and with a coordinated and sustainable management strategy.

An overlay zone should probably be created, partly form-based, to specify and control densities, unit types, and relationships to public spaces and landscape.

Recommendations

- Develop a stock of affordable, year-round housing options for families, workers, artists, professionals and elderly, according to a phased plan that concentrates development at pedestrian-accessible nodes on the west end of the Island, reinforcing a neighborhood scale and character of the west end village. Include accommodations for home-based businesses wherever possible.
- Develop new live-work apartment units in the west end village, through the reuse of industrial buildings or the construction of new buildings. Provide a combination of unit types, including family housing with home office space and live-work open loft space.



LARGEST GUN IN THE WORLD, FORT WRIGHT, FISHERS ISLAND, N. Y.

A NEW GATEWAY SQUARE could consolidate new places for business, upper level live-work space, and artists space to create a vibrant, distinctive and inviting entry to Fishers Island from the ferry landing. A signature element could be placed in the square, like one of the famous disappearing guns that once was stationed on the Island. These were the largest guns in the world when manufactured (see postcard, left)

Business and Job Creation

While finding affordable and appropriate housing is probably the foremost challenge facing year-round Fishers Islanders, many residents we interviewed indicated that limited employment opportunities are another critical factor in decisions about whether to move to or remain on Fishers Island. While a windshield survey of Island businesses suggests that there are high levels of entrepreneurship and small business ownership on the Island, business types are limited primarily to those which service Island residents

(especially summer and seasonal property owners) and that many Island jobs require manual labor. The biggest of these include property maintenance services like landscaping, cleaning and construction, while other employers include retail (groceries, gifts, gasoline), and education (FI school). Naturally, these businesses are limited in scope by the small market size of the Island and the seasonal nature of its population, and will likely see limited growth in the future, producing no new jobs or business opportunities. They also may have limited appeal to those considering moving to Fishers Island – especially creative

professionals and individuals with higher levels of educational attainment.

If Fishers Island is to maintain and grow its year round population, appropriate foundations must be laid to accommodate and encourage a more diverse group of entrepreneurs, creative professionals and free-lancers whose desire to live on the Island will not be driven by Island-specific employment opportunities, but instead by the appeal of the Island's character and quality of life, as a place to live or to own a small business. This group's income will likely be tied to off-Island economic systems and will therefore bring income to the Island, and may include educated professionals who might need to commute to mainland jobs or consulting engagements (perhaps to major employers like Electric Boat, Pfizer, Connecticut College, or University of Connecticut, Avery Point), those who might work part time or full time remotely as contractors or consultants from their homes or from Island-based office space (like computer coders, back office workers or day traders), and those who might want to create small, internet-based businesses. Many in this group may be couples or families with two working spouses, one of whom might have a business on the Island and one of whom might need to commute off-Island to find more traditional employment. Whatever their employment situation, their primary motivation for living on the Island will be the quality of life it offers, in terms of a sense of community, possibilities for family life, a compact footprint, an attractive setting, and access to amenities. Among this mobile group, reliable and easy access to the outside through the ferry and internet are critical.

Throughout this planning process, the team also identified a number of place-based business opportunities which would rely on a modest increases in visitors to the Island, and could contribute to the overall vibrancy and diversity of Island life, including a small inn and conference center (see Hospitality, page 68), an expanded artist's colony (see Creative Placemaking, page

70), or a boarding facility for foreign students coming to spend a semester at the Fishers Island School (see Fishers Island School, page 64). A small residential nursing home facility that could serve Island elderly who choose to remain on the Island after they are unable to live alone was also identified as a need. These businesses would provide opportunities for small business ownership and capital investment in the west end of the Island, and would also produce a modest number of service jobs.

Creating the right conditions to attract and support new businesses and creative professionals requires dealing with a constellation of issues, many of which are addressed in other sections of this report. Ferry service must be made to support those living on the Island who wish to commute to the mainland to work, through improved schedules and reduced fares (see Improving Ferry Service, page 81). Internet service must be improved in both speed and reliability to allow for remote working, internet based businesses, and for greater social connectivity (See Improving Internet, page 93). Housing must be available and affordable (see Housing, page 56). But another substantial challenge is finding appropriate, flexible work space on the Island, suited to a variety of business models and sizes, and situated in a way that provides a sense of community, connection to neighbors and other businesses and access to shared amenities, to combat the isolation that some year-round residents encounter during the off season. While the commercial space centered on the green does provide this for a few businesses, many are seasonal and little space is available for expansion. Connections to other amenities in this area is also weak.

Spaces for Work in Wrightville

A revitalized Wrightville area, as a compact, transit-oriented, mixed use development, has the potential to provide a variety of attractive spaces for work within a vibrant, highly condensed, community framework that would benefit the whole Island. As conceived in this plan, Wrightville could be composed of flexible buildings

that could accommodate a variety of uses, including upstairs loft space that could be used as offices, artist's studios, residential apartments, or live-work combinations, and more conventional ground floor commercial space that could be used for professional offices, galleries, retail or food and beverage.

The center of this activity could be a signature village square that serves as an Island gateway, just off the ferry landing at the end of Greenwood Road and Hound Lane. The existing red brick industrial loft building at the north edge of the new square (which currently housing freight services on the ground floor) could be renovated with live-work or loft apartments on the upper floor and commercial space on the lower level, perhaps retaining some of the current commercial functions. A new mixed use building at the south edge of the square, at the corner of the school's parcel could contain a combination of live-work loft space on the upper floor with commercial space below to support professional offices or a small café. The old fort bakery next door, currently for sale, could be redeveloped as a small café / restaurant with *al fresca* dining in the open area to the west. All this would be served by a reorganized, attractively landscaped parking lot north of the square.

Around the corner to the north of the existing industrial loft building, another new linear loft building could house more loft spaces, perhaps artists' studios or live-work units. Just a little further north, the former munitions storage building facing out to the sound could be revitalized as a very special boutique hotel and conference center with incredible views out to the Long Island Sound and direct access to the proposed multi-modal trail leading up to the military fortifications.

Anchoring the south end of Greenwood Road would be a new residential square, and the Schmidt Road housing project – semi-detached affordable housing within easy walking distance

of all these new working spaces, and which themselves could have home offices with independent front doors.

The Wrightville area, as conceived in this plan, would provide an attractive, compact, mixed use and pedestrian- and transit- oriented village setting for new and existing residents to locate businesses within a stone's throw of the ferry, community center with its health club, Fishers Island School, proposed recreational trail, and reservoirs of new housing, while providing a sense of vibrancy and community that would be desirable for new creative businesses and professionals.

Recommendations

- Develop new, flexible commercial space for small business and professionals within a compact, transit-oriented, pedestrian based, community framework in the west end village area of the Island, with good access to Island infrastructure and amenities like the ferry, community center and health club, Fishers Island School, and served by reliable, high speed internet connections.
- Provide targeted economic development opportunities, supportive of, and compatible with, current Island character and life-styles, including limited hospitality and conference facilities, small-scale retail and live-work opportunities, and significant new arts-related programming and development. Focus this new development in the fort area.

Fishers Island Union Free School

In Clarence Perry's classic definition of the walkable neighborhood unit, the symbolic and physical center of a neighborhood is defined by an elementary school. The school is a neighborhood-scale civic space and community anchor, serving primarily to educate, but also to draw together the diverse families that it serves, and to serve the community at large through shared use of its indoor and outdoor facilities. In Perry's model the overall physical size of a neighborhood is therefore dictated by pedestrian access to the school's facilities - by the distance a child can walk to the school in about 5-10 minutes.

For many years the Fishers Island School has fulfilled the important role of social anchor for the year-round community on the Island. But physically, it occupies a liminal site, at the edge of Fisher's main residential areas, and is somewhat remote and disconnected from the homes of many of the Island students it serves (see map on page 66). Redevelopment of the fort area as a village neighborhood will "re-center" the school, by making it proximate to new, affordable residential units within walking distance that could serve families, faculty and staff. New development around the school will also re-contextualize it, better connecting it to close-by assets, like the community center and its athletic and cultural facilities, the ferry, the arts district, and the Island's natural and military heritage through the new trail system.

The school may also act as a development partner in the fort area, perhaps through the development of staff or student housing or through shared spaces developed with other Island groups like the Island Community Center or Lighthouse Works.

Role of the School in Year Round Population
Education options play a critical role in the choices families make about where to live, sometimes trumping even housing and jobs in their decisions.

On Fishers Island this tendency produces two effects: occasionally causing families to move off-Island seeking alternative education options, but also affecting choices of whether a family might move to Fishers long term. For Fishers to be successful in stabilizing and increasing its year round population, the school must be seen by visitors and residents alike as a true asset, and a reason to move to Fishers, not a reason to stay away. Recent studies, initiatives and changes instituted by the school administration recognize this need, and are moving the curriculum and "brand" of the school in a constructive, positive direction that is making the school increasingly attractive to those who choose to live on the Island.

While the school plays a critical role in attracting and retaining year-round families, its functioning has been adversely affected by the decline in year round population over the years. In 1986, the school began supplementing its own Island student population with tuition students from the Connecticut mainland, a strategy which has been effective in creating small but workable class sizes in the middle and high school, and to create a reasonable social environment for the students. The downside of this strategy is that although Connecticut students pay tuition (around \$3300), it is no where near the full cost of their education. This means the average annual cost of education per Island student is greater than \$100,000.⁷

If population decline is not reversed, the school will face ever-more-challenging enrollment numbers until it may no longer be possible for it to function at all (see sidebar on school enrollment). The school may have already reached a critical moment, and if more families with young children are not attracted to Fishers soon, the elementary school will face catastrophic challenges.

As part of this planning effort, the Yale Urban Design Workshop commissioned a detailed status

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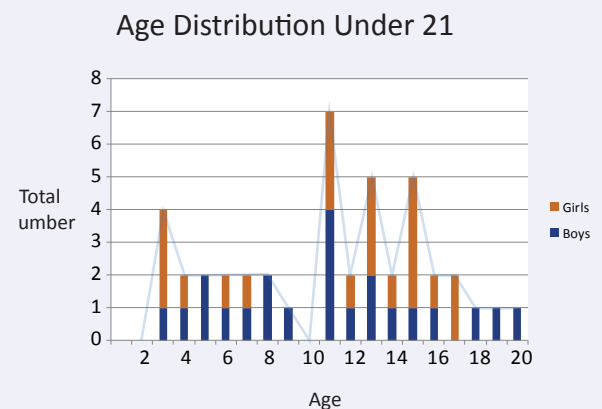
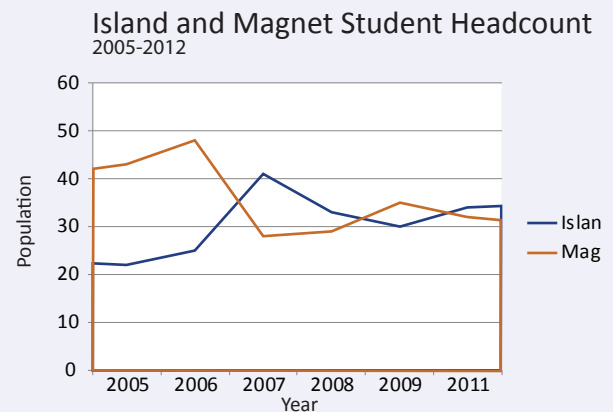
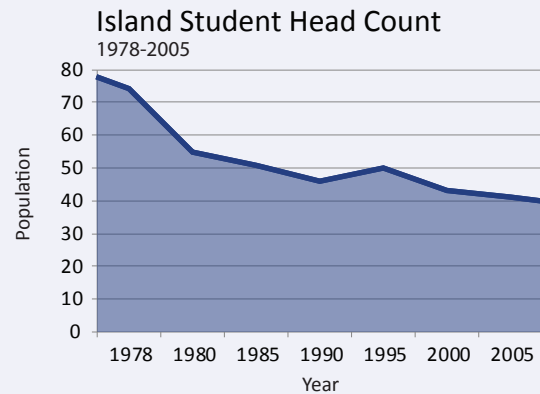
Lamont, Fishers Island School, Appendix A.

report on the school from education consultant Jean Lamont, Partner in Educators' Collaborative, LLC, and a former head of the Foote School in New Haven, CT. Ms. Lamont spent a day on the Island in June 2012 meeting with faculty, staff and administrators, school board members, and observing the school in action. Her findings on the school were generally positive.

On the physical condition of the school, she found some positive aspects, including attractive facilities for grades 7-12, "spacious classrooms, a large gymnasium, a tech workshop, an attractive arts studio with natural light, and an appealing courtyard used by students for gardening," but found the music studio wanting. The elementary school facilities were less attractive, including both classrooms and playground, as the space they currently occupy was originally designed to be an open-classroom school.

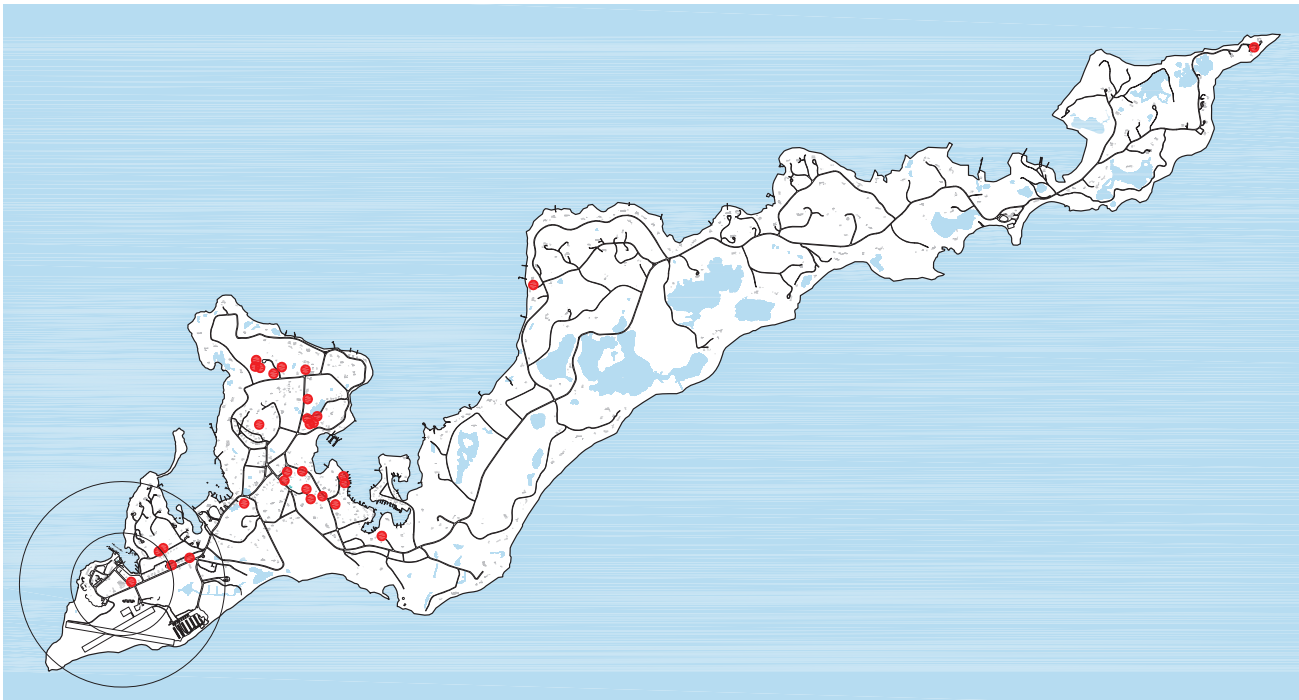
Ms. Lamont found the faculty to be warm and collegial and students "relaxed and engaged" and reported that "teachers respond positively to the clause in their contracts that contributions to school live beyond their stipulated assignments are expected."

In her analysis she provided two alternative future scenarios for the school, with associated recommendations: one in which the FI community was not interested in a year round population, and one in which maintaining the year round community was a core value. Unsurprisingly, in the latter category, many challenges that need to be addressed are found outside of the school itself, including employment opportunities on Island, affordable housing, ferry fees and service; but Ms. Lamont also noted that investment should be made in the physical plant of the elementary school, as well as in providing more, better space for the arts. Since the time of Ms. Lamont's visit, the new administration of the school has begun the process of addressing the school's other physical shortcomings, retaining an architect to do a facility analysis and make specific recommendations



DECLINING POPULATION AT FISHERS ISLAND SCHOOL

Since the 1970's, the Island student population at the Fishers Island School has declined dramatically, from nearly 80 students in 1978 to 36 in 2013. Unfavorable population demographics in the female 20-40 year old (child rearing) age suggest continuing decline unless new families are attracted to Fishers from outside. Stability of the elementary school is a particular concern.



***FISHERS ISLAND SCHOOL FAMILIES** primarily live in the west end of the Island, as indicated by red dots on this map. But only a few currently live within easy walking distance of the school (the two circles indicate a 5 and 10 minute walk*

from the school, respectively), but most live within bicycling distance. All new family housing should be located within a 5 minute walk of the school.

on changes that should be made. The Board of Education has established as priorities the redesign of the elementary school into four individual classrooms, the expansion of the music classroom, the addition of art storage space, and fencing and equipment to address school safety and security needs.

Ms. Lamont's report may be found in the appendix of this report, as can an update from Karen Goodwin, the current principal, of the many improvements, positive changes and initiatives that have occurred since Ms. Lamont's visit.

As this study was developing in the summer of 2012, and as a result of much discussion on the part of the administration, school board and community about how the school could be made better performing and more attractive, the School decided to embark on a series of changes: investigating implementation of the School-wide Enrichment Model (SEM), developed at the *Neag Center for Gifted Education and Talent Development* at the University of Connecticut (UConn). This system leverages the existing high student to faculty ratio of the school by emphasizing personalized instruction and project-

based learning. In fall 2012, Teachers received training from faculty at UConn, and in spring 2013 implementation began with changes to instruction and use of technology. Continuing and expanded adoption is planned for the upcoming year.

The School's high school curriculum, which has traditionally been limited in its offerings by student body size, is also being extended through use of technology and innovative programs. It has begun to offer college credit through University of Connecticut's *Early College Experience* program, with the intention that students will graduate with 15 hours of college credit, and a vastly expanded array of courses are being offered through online learning programs including *Virtual High School* and *AccelerateU*.

These important programs require extensive use of technology and the internet. As New York State adopts the *Partnership for Assessment of Readiness for College and Careers* (PARCC) standard in 2014, requiring exams to be administered online, and as other distance and online learning tools expand, the school will continue to demand higher bandwidth to function optimally. The school is already investigating

possible short-term improvements with Fishers Island Telephone, but in the longer term, the on-island data distribution infrastructure (as part of a targeted improvement area in Wrightville) needs to be upgraded, and ultimately backbone service to the Island must be improved to keep pace with increasing demand and competition for bandwidth from all Island users (see “Improving Telecommunications” in Chapter V).

Other ways of enriching, diversifying and expanding the school’s population were discussed as part of this planning effort, as were alternate models for education on the Island. Some of these discussions involved structural changes to the school that were discarded as infeasible or not supporting the goal of year-round population growth (including eliminating the high school and focusing on elementary education, conversion to a charter school, or conversion to a private school—initial findings on some of these are covered in Ms. Lamont’s report), other enrichments may provide the school and the Island with additional benefits.

One way of enriching and expanding the student population would be to create a high-school “year out” program, inviting students to come and spend an academic semester or year on the Island. Particularly if themed around an appropriate academic field that takes advantage of the Island locale, such as marine biology or sustainability, high quality students could be drawn to the Island, creating a larger and more robust academic student and social community. These students could be either domestic or international, and would need room, board and chaperones on the Island – potentially providing an on-island business opportunity and a modest number of jobs for caretakers or “dorm parents,” a cook, etc. Domicile for these students could be provided in a new building in the fort area or in a renovated building in the fort on the Parade.

There might also be the opportunity to use the school facilities in the summer months by creating an “Island Institute,” which could bring high school or college students together for a number of

weeks around a particular subject, such as the arts or sustainability. A program could be run either by the school district itself or by an alternative Island group like the Lighthouse Works.

It is worth noting that the school itself can and should be viewed as a potential source of year-round Island residents. Fifty percent of the current employees of the school choose to live off the Island (many for reasons enumerated elsewhere in this report). New employees, when hired, should be given a welcome package from the Island and should be actively recruited and assisted with relocation. The school board should consider providing a financial incentive for employees to relocate to the Island and promise to remain for a given number of years.

Recommendations

- Continue to expand and improve the use of the “school-wide enrichment model” in partnership with the University of Connecticut.
- Commission an architect to do a detailed facility review and develop a plan of action for improving the elementary school’s physical facilities, both indoor and outdoor.
- Improve arts facilities and programs. Consider establishing or expanding current collaborative programs with Lighthouse Works.
- Encourage new school employees, when hired, to become year round Island residents. Develop a recruitment package and assist/support relocation. Consider providing a financial incentive for employees to relocate to the Island.



Hospitality and Visitors

A modest sized Inn on Fishers Island, consisting of 15-30 rooms would provide a low-impact economic development opportunity and jobs, while enhancing the life of the Island and supporting future businesses in the Wrightville area. An inn of this size could be configured as a small conference center, equipped to accommodate board retreats or small corporate meetings. An on-site restaurant could cater to these kinds of events while also serving the wider Island population.

An inn might also have a larger ballroom with views of the landscape and sea—a place for Islanders and their families to host weddings or other special events, and could be themed around the arts, like the 21c hotel in Louisville, Kentucky or the Benesse House on the Japanese Island of Naoshima (see also Creative Place-making, below). The ordnance building at the north edge of the fort would be an ideal location for this kind of inn.

If developed, an inn should be located within walking distance of the ferry landing, allowing visitors to arrive from Boston, New York and further via rail. It should also be located within

walking or biking distance from the Island Green, Ferguson Museum, and Wrightville area giving visitors easy access to businesses, culture and recreation.

Architecturally, an inn should be designed to be compatible with both the Island's historic architecture as well as its settlement pattern. One way to accomplish this would be to reuse an existing building—for instance the ordnance building, as mentioned above, or a house overlooking the Parade. If a new building is to be constructed, siting should be carefully considered in relation to neighbors and views, and an architectural language chosen that augments the character of its site. Sites that could be appropriate for new construction include the east end of the Parade or the large empty lots opposite the Ferry landing on Reservoir Road.

Recommendations

- Develop a small inn and conference center as an adjunct to new Island businesses and as a destination for board meetings and retreats, family events and hospitality.



ARTS-THEMED INNS (above) The Benesse House (top) in Naoshima Japan combines dramatic views of the landscape from rooms and public spaces with a world-class collection of art in lobbies, hallways, and galleries. The 21c

hotel in Louisville (below) occupies a reused downtown building in Louisville, KY and also puts art at the center of visitors experience, with permanent and rotating exhibits throughout the hotel.



INNS The 24 room Cleremont Hotel at Southeast Harbor is a traditional New England seaside inn. Rooms in the Benesse House, in Naoshima Japan have dramatic views of the sea.

Creative Placemaking: Leveraging the Arts, Military Heritage, and the Natural Landscape

Creative Placemaking has been defined by the Artplace Foundation as “Art and culture at the heart of place-based strategies that can transform communities through increased vibrancy and diversity.” At the core of the creative placemaking concept is linking creative industry, the arts and culture to local history and the landscape to create distinctive, vibrant places, economically and culturally diverse, sustainable, and with a strong sense of community.

As Wrightville is redeveloped as a cohesive Island village, a creative placemaking approach offers a way of putting creative culture at the center of Island community life, and making an exciting, imagable place capable of attracting new residents, visitors interested in the arts, and providing year-round economic development opportunities. A creative placemaking approach for Wrightville could include:

- Developing the area as an arts village and arts community. Attracting creative individuals to the Island, including permanent residents in the arts and creative industry workers, as well as bringing artists to the Island on a short term basis through the Lighthouse Works (LW) fellowship.
- Developing sustainable architecture and design, and using innovative planning to link and open up the landscape adjacent to Wrightville, to hikers and cyclists through new trails and an Arts Walk.
- Reusing the remaining pieces of the Island’s military heritage in a creative way, through the renovation and reuse of military buildings. Making accessible and interpreting the gun emplacements in a provocative way.

In combination, these themes could produce a vital village atmosphere, strongly linked to the history and landscape of the Island, with the arts at its core. A “creative place making” approach to the development of Wrightville has tremendous potential to tie these themes together.

Recently, national interest in the intersection of the arts, urban planning and economic development has driven a number of new creative place making grants and initiatives which sponsor arts based projects seen to contribute to increased community vibrancy, quality of life, and economic development. One such program is the Art Place program,



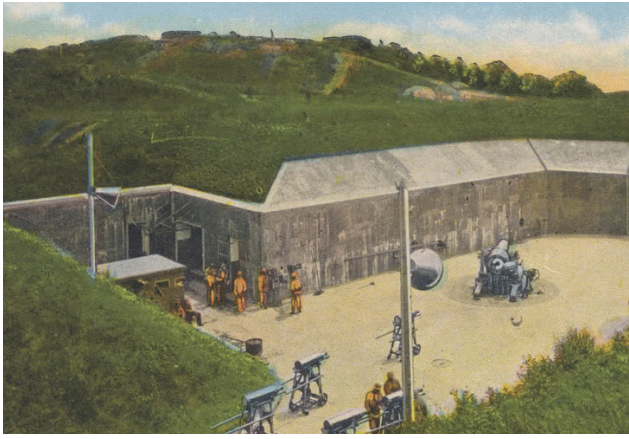
OFF THE GRID CABINS at the western tip of Fishers Island could provide space for artists and fellows of the Lighthouse Works to work on independent projects in isolation, with dramatic views of the Sound and the landscape, just a short walk from the village center to the east. Cabins could be

clustered to form mini-communities or allow groups to come to the Island to collaborate, such as artistic directors, playwrights, or other creatives. (Image: Yale Urban Design Workshop)

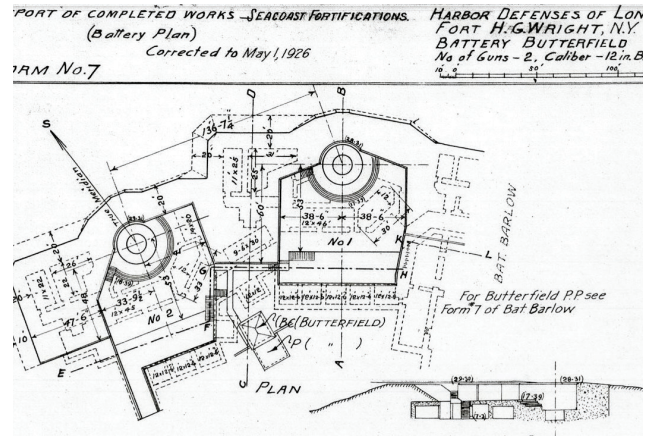
supported by a consortium of private philanthropies, which in 2014 will provide funding of between \$50,000 and \$500,000 to support major creative place making projects. Creative place making grants, including the Art Place grants, often look for initiatives which are public-private partnerships, and where the goals of the project tie in with both the strategic goals of the arts organization(s) involved and the economic development goals of the community.

There is already a nascent arts scene beginning to develop in the area. Several years ago, world-class architects Todd Williams and Billie Tsien purchased one of the former military buildings and converted it to a part-year residence and place for office retreats. The Lighthouse Works, established in 2011, has begun bringing artists to the area on creative fellowships, establishing

a print shop in the area and working with the school to build a recording studio in the old bowling alley. Building on the existing fellowship program, and facilities offered through the Lighthouse Works has the potential to enlarge the Wrightville artists community and enrich the cultural economy of the Island, combining the kind of private working spaces provided in places like the MacDowell Colony (macdowellcolony.org) in Peterborough, New Hampshire, or the Fine Arts Work Center (fawc.org), in Provincetown, Massachusetts, with shared community facilities or through a shared work center, with space for traditional woodworking, metalworking, book arts, letterpress printing, or digital processes and 3d printing. A facility like this could serve visiting fellowship artists and creative entrepreneurs in the community, but could potentially offer classes, drawing in artists and artisans from



FORT WRIGHT'S GUN EMPLACEMENTS (above) could be preserved and interpreted as part of a military heritage park,



connected to recreational trails, and used as performance space or for art installations.

other parts of the country, like the Center for Book Arts (centerforbookarts.org) in New York City, or the Penland School of Crafts (penland.org) in Bakersville, North Carolina. Another example that combines many of these features is found on the fortress Island of Suomenlinna, off the coast of Helsinki, Finland. There, the Helsinki International Artists Program (HIAP) in converted military and industrial buildings, hosts 70 – 90 artists per year and includes the Palmstierna Studio complex of working spaces, five artist's studios, guest rooms, and a gallery space, and attracts visitors to open studios and gallery events from the nearby metropolis. Suomenlinna is also home to an open air theater, conference facilities, the Jetty Barracks Gallery which shows contemporary art, the Icecellar, a performance venue, and colony of crafts-people who occupy various buildings; a ceramic studio, the Hytti glass studio, which rents glassblowing time to glass artists, and the arts School Maa. All of these have developed over the course of the last 20 years.

Another way to integrate the arts into the development of Wrightville could be to theme a small inn around the arts. Recent projects like the successful 21c hotels first in Louisville, and now Cincinnati and Bentonville, or the Hotel Benesse House on the Island of Naoshima in Japan couple high end guest rooms with a world class art collections and fine dining within the walls of the hotel. An inn of this type could comfortably occupy the former ordnance building on the north edge of Wrightville, drawing in visitors from

Boston and New York for gallery openings.

The arts walk proposed in this plan could tie together many of these elements and link Wrightville to the dramatic gun emplacements to the west, which could be cleaned up and reused as performance space or location for temporary arts installations, just like the industrial ruins at the Duisburg Nord Landschaftspark in Duisburg, Germany. Beyond, off the grid cabins for HLW fellows who require more solitary working space could stand in the landscape, and even beyond that, trails could link a combination of permanent artworks, temporary artworks that are rotated annually, or artworks produced locally through a LHW fellowship, as an art park of sorts, like a small version of Storm King Arts Center in New Windsor, NY, Laumeier Sculpture Park in St. Louis Missouri, or Oliver Ranch Foundation Sculpture Collection in Geyserville, California.

A vibrant arts village in the fort area, when coupled with the ferry, housing, school and business creation concepts discussed above, could provide an imagable zone of year-round Island life, attractive to a diverse group of potential year round residents and visitors because of its distinctive character, sense of community, and neighborhood scale quality of life.



SUOMENLINNA FORTRESS ISLAND (above), off the coast of Helsinki, is home to a thriving artists community of galleries, artists fellowships, workshops and a conference

center, all within former military buildings built in the 17th, 18th and 19th century.

Recommendations

- Emphasize the arts, creative industry, telecommuting and hospitality as the basis for growing the local economy. Concentrate arts development in the west end village.

- Make accessible and connect, through cycling and hiking trails, remnants of military heritage and natural landscapes on the Island, especially in the west end around the former gun batteries and the Parade.



CONTEMPORARY CABINS Butaro doctors housing in Rwanda by MASS Design Group (top left), the “Signal Shed” prefab house by Ryan Lingard (top right), False Bay Writers Cabin by Olson Kundig (middle left) and fellowship cabins on Fogo Island, Newfoundland by Todd Saunders (middle, right and bottom).



ART IN THE LANDSCAPE Along the arts walk and on the western tip of the Fishers Island, outdoor sculptures could enliven the landscape, as the do on the island of Naoshima, Japan, and at Storm King Arts Center in New Windsor, NY.



Improving Infrastructure



Improving Infrastructure

For year-round residents, access to infrastructure dominates the daily life on the Island.

Introduction

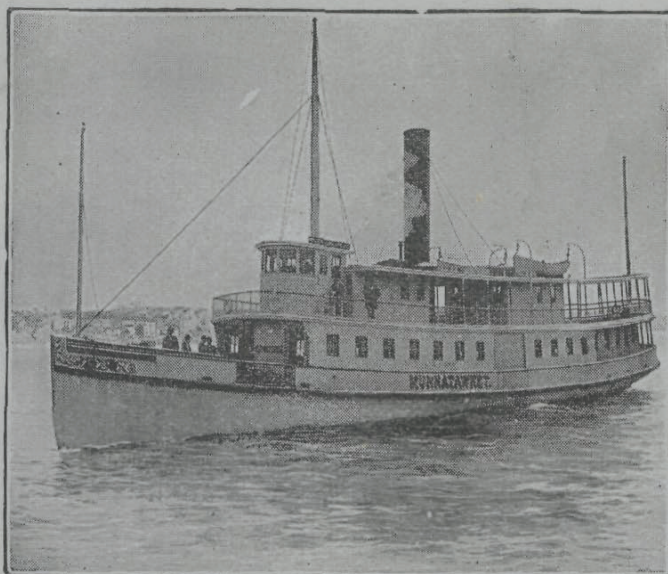
The quality and cost of accessing infrastructure on Fishers Island affects everyone, but not in equal amounts. Whereas shortcomings in the Island infrastructure may inconvenience seasonal residents during their visits to Fishers (some visitors may even find that they are part of the “slow” character of Fishers Island), for current and prospective year-round residents, access to infrastructure dominates many aspects of daily life on the Island, including the ability to access work, health care, education, food, and recreation. In discussions with residents, certain concerns over infrastructure were voiced repeatedly. These include:

- The high cost of electricity and heating oil
- The high cost and limited schedule for commuting on the ferry to mainland jobs
- Reliability and bandwidth of internet service
- Reliability of conventional wired telephone service
- The Island’s limited pedestrian and bicycle network on the west end
- The future of public health and safety services on the Island with the aging population

Some elements of Island infrastructure, including the Fishers Island School, new recreational trails in the east end, and redevelopment of the fort area are discussed in the previous section of the report. In this section, we have examined the situation in each of the categories listed above (ferry, utilities, bicycle and pedestrian infrastructure, and visitor accommodations) and provided recommendations geared primarily towards benefitting the year-round population, but that will in most cases also provide collateral benefits for the seasonal population. In general, we have looked for ways of optimizing the efficiency of these services with the least possible investment, but many of these solutions will require long term capital investments. For next steps and suggested time frame for completion, see also Chapter VII: Next Steps.

MUNNATAWKET FERRY SCHEDULE FROM 1896 (opposite, top) for more than a century, the ferry has been a critical infrastructure providing access to the Island (Library of Congress)

UTILITY MAP (opposite, bottom) of the area around the green showing electric, water, and telephone systems provided by Fishers Island Farms in 1934 (Town of Southold Archives).



1896.

1896.

TIME TABLE.

≈ STEAMER ≈

MUNNATAWKET

— BETWEEN —

FISHERS ISLAND

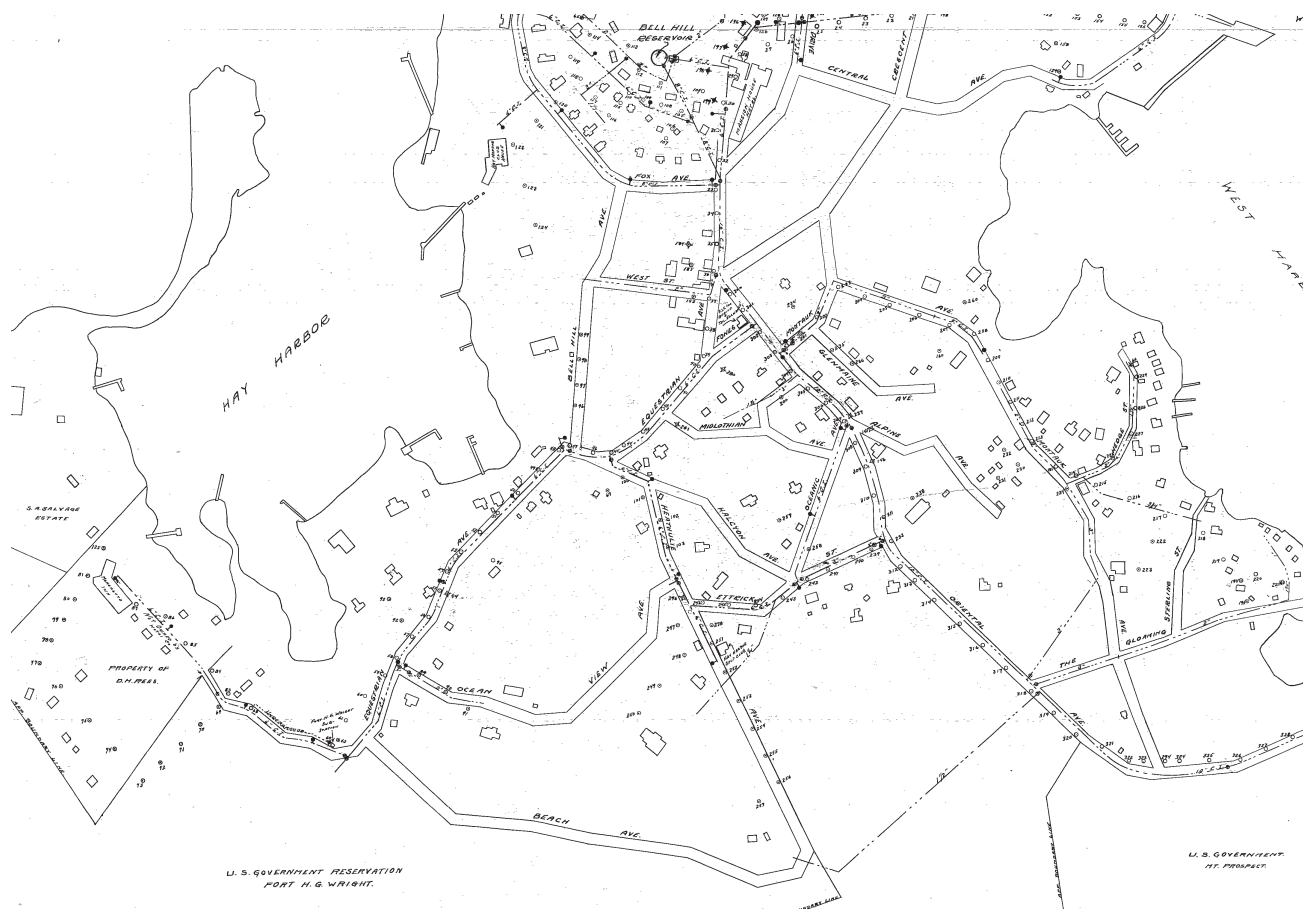
— AND —

NEW LONDON.

Leaves Fishers Island 8.00 and 10.45 a. m., 3.00 and 5.15 p. m. Leaves New London (foot of State St.) 9.45 a. m., 2.00, 4.30 and 6.10 p. m., or on arrival of train leaving New York at 3.00 p. m.

EXTRA TRIPS—Mondays leaves Fishers Island at 6.00 a. m. New London at 7.00 a. m.

SUNDAYS—Leaves Fishers Island 9.00 a. m. and 4.45 p. m. New London 10.00 a. m. and 6.00 p. m. (OVER)



Passenger Steamer "Restless" New London, Conn.



Improving Ferry Service

As in other Island communities, ferry service to Fishers Island functions as a primary lifeline. The Fishers Island Ferry carries not only residents, visitors, workers and students back and forth from the mainland, but also carries groceries, mail, cars, fuel, construction vehicles and materials, and trash on a daily basis. The Ferry is a vital asset to the Island—and to a great extent its schedule determines the ebb and flow of daily life. It is no surprise then, given its importance, that some of the limitations of year-round residency reflect the limitations of the current ferry service and its schedule, especially as they pertain to commuting off-island for employment.

The Fishers Island Ferry is run as a public ferry district constituted under New York State law¹. It is paid for through a tax levied on all privately-owned properties within the district and through receipts from ticket sales and freight, and is managed by a professional director and staff overseen by a 5 member commission which is elected regularly by Island residents². The authority to plan and make changes in ferry operations rests with this commission. As discussed elsewhere in this report, under village incorporation the ferry operation could come under the consolidated control of the Village Board³.

The Ferry District currently owns two boats, the M.V. *Race Point*, capable of carrying approximately XX cars and 250 passengers, and the M.V. *Munnatukett*, with a capacity of approximately xx cars and 214 passengers, but typically runs only one boat at a time, with the exception of “peak season” between May 1 and Oct. 20, when both boats run. The boats are berthed in New London, Connecticut. The second boat also provides service during the period when the first

1 *Fishers Island Ferry District Act*. Chapter 699 of the New York State Laws of 1947.

2 Ibid.

3 Clavin, John and Fishers Island Civic Association. *Incorporation Study Report*. June 1985.

Recommendations

- Improve / increase ferry service for residents. Accommodate, in the most efficient possible way, residents wishing to commute to Connecticut in the morning, especially those going to mainland employers. Berth one boat on Fishers Island in Silver Eel Cove to allow boats to run inbound and outbound on a simultaneous schedule with a 7:30 morning departure, year round. Provide residential accommodations for the captain and crew of the Fishers-based boat in the Fort area of the Island. As the two existing ferry boats are replaced in the next 5-15 years, acquire more efficient boats, similar in size to the M.V. *Race Point*, to reduce travel time between New London and Fishers Island by 10-15 minutes.
- After Village Incorporation, consider making the ferry district a department of the Village, managed under the Island Manager, Mayor and Trustees, and eliminating the Ferry Commission. Taxing and bonding for capital improvements would then be made through the village budget.
- If the Ferry District is to remain a separate district, review and revise the enabling legislation to modify the requirements for becoming a commissioner, and/or reduce the number of commissioners, to make up for the reduction in qualified commission candidates.
- If the Ferry District is to remain a separate district, review and revise the enabling legislation to allow for the level of bonding necessary to replace the aging ferry fleet. Raise the tax cap as required to pay for those bonds.

boat is out of the water for 3-4 months of annual maintenance work, and is used as a back-up in case of mechanical trouble.

The current early morning ferry schedule, with a first departure from New London at 7:00 am and arrival about 45 minutes later, is critical to much regular Island business—bringing contractors, delivery trucks, construction vehicles and materials, and magnet students to the Fishers Island School. After reloading, the boat first departs Fishers at 8:15 a.m., arriving around 9:00 am. This schedule effectively limits the ability of potential or current residents to work in a mainland 9-5 job. As mentioned elsewhere in this report, limited job opportunities on the Island are a major negative factor when considering year round residency.

Modifying the schedule could accommodate an earlier first departure from Fishers by having an earlier departure from New London. The overriding concern with this kind of change is the length of commute imposed on magnet students coming to the Fishers Island School from Connecticut, who would now have to catch a ferry at 6:00 am and arrive well before the start of the school day.

The recommended solution, discussed extensively with stakeholders, is for the Ferry District to concurrently operate a second boat, similar in capacity to the M.V. *Race Point*, to be berthed in Silver Eel Cove on Fishers Island. This boat could have an initial departure at 7:30 a.m., and would deliver residents to New London in time to get to a job within a few miles of the City. This would make it feasible for workers at the region's major employers – Electric Boat, Connecticut College or Pfizer, to live on Fishers Island and commute to and from work. It could also allow secondary students to commute off-island to School, providing more educational choices for Island residents.

Only modest modifications would be needed at Silver Eel Cove to accommodate over-nighting

the boat there. According to the Ferry District management, this would include providing shore power in the form of a dedicated electrical service for the boat, probably for under \$10,000⁴.

In the next few years, each boat in the current fleet will reach the end of its service life, and the Ferry District has begun to consider replacement options. Selection of a more efficient design that minimizes wake could potentially cut 10-15 minutes off the travel time between Fishers and New London, further improving the convenience of the trip for daily commuters⁵.

Beyond the operation of a second boat, another option that has been discussed with stakeholders is for the Ferry District to operate a third small, fast, pedestrian-only boat, similar to the local *Popeye* commuter boat. The primary benefits of a smaller boat would be speed and schedule flexibility, with travel from Fishers to Connecticut reduced to around 20 minutes in good weather. The speed advantage over the large boats will be reduced if the new large boats in the fleet can be made more efficient (as noted above). Reliability in bad weather would be a major concern for

4 District management estimates that a new, dedicated 208 Volt, 3 phase, 60 amp service would be required.

5 A more efficient hull design which produces a smaller wake would allow the boat to come up to speed more quickly in New London Harbor, reducing the crossing time.



COST OF COMMUTING TO THE MAINLAND AND TRANSFERRING TO PUBLIC TRANSIT

Item	unit cost	units	total
Ferry per person peak	\$11.00	80	\$880
Ferry per person off peak	\$8.00	360	\$2,880
TOTAL			\$3,760

COST OF COMMUTING TO THE MAINLAND BY PEDESTRIAN ONLY BOAT

Item	unit cost	units	total
Ferry per person peak	\$11.00	80	\$880
Ferry per person off peak	\$8.00	360	\$2,880
Excess Cost of Second Car Ownership*			\$6,058
Downtown New London Parking	\$52.00	12	\$624
TOTAL			\$10,442

COST OF COMMUTING TO THE MAINLAND WITH CAR

Item	unit cost	units	total
Ferry per person peak	\$11.00	80	\$880
Ferry per person off peak	\$8.00	360	\$2,880
Ferry per car peak	\$23.00	80	\$1,840
Ferry per car off peak	\$14.00	360	\$5,040
TOTAL			\$10,640

* Source: American Automobile Association, "Your Driving Costs, 2013 Edition"

morning off-island commuters, and commuting to work using this kind of boat would be complicated by the need for connecting transit service or an additional car kept in New London (see table above for a comparison of commuting costs between a pedestrian-only boat and a car boat). A final concern is that it would cannibalize passengers who would otherwise take one of the larger boats.

The cost of a commutation ticket was identified as a significant barrier to rear-round residency. Currently a full adult walk-on fare is \$25 peak or \$19 off peak, and "Commuter Books" of 10 for full-time residents may be purchased for \$110 peak per adult pedestrian or \$230 peak per automobile. Off peak rates are \$80 and \$140 respectively⁶. We calculate that an average daily commuter, commuting to the mainland 5 days per week, would spend approximately \$10,500 per year to make that commute, whether they bring their own car on the ferry, or walk on and keep a second car on the mainland (see table above)⁷.

By comparison, the most expensive monthly commutation ticket on the Long Island Railroad (from Greenport to Penn Station) costs \$466 per month, or \$5,592 per year, and on Metro North from New Haven to Grand Central Terminal is \$436 per month, or \$5,232 per year.

In support of the other goals of this report, commuter service for full time resident daily commuters should be made as inexpensive as possible. Consider creating a different category of pass for daily commuters. Encourage daily commuters to use bicycles by eliminating the bicycle surcharge for this group. These goals may require introduction of a new, more flexible ticketing system than currently exists.

Any modifications to existing boats, or specs for new boats, should take into account expanding interest in commuting by bicycle and provide expanded accommodations for bicycles, providing

6 www.fiferry.com/c_rates.htm, accessed July 4, 2013.

7 Employees of companies that offer commuter

tax benefits, such as the University of Connecticut, would have a lower effective cost of commuting through the use of pretax dollars. Federal limits for use of pretax dollars in 2013 are currently set at \$245/month.



another attractive option for completing a commuting trip at either end. Accommodations should also be made for securing bicycles at each ferry landing.

Having a second boat berthed on Fishers would have important collateral economic benefits—the Captain and crew of this ship would be new year-round residents on the Island, and these jobs would have long term stability, adding to the Island economy. Housing this group would initially be challenging, but new affordable housing within walking distance of the ferry landing (some of which might fall on land managed by the District now), as proposed elsewhere in this report, could easily address the needs of this group. This housing could be developed by the Ferry District itself and reserved for its staff, or it could be developed in the private market with options reserved for ferry workers.

Another benefit of having a boat berthed on the Island would be faster response time, especially during off hours, to an evacuation order in the unlikely event of an accident at nearby Millstone Nuclear Power Plant in Waterford, Connecticut.

Fishers Island is the only part of New York within the plant's 10 mile Evacuation Planning Zone (EPZ), and the evacuation plan calls for residents to be carried to New London by the Fishers Island Ferry.

Planning and Financial Considerations

As mentioned above, the two boats in the Fishers Island Ferry District fleet are rapidly approaching the end of their service lives. In the immediate future, the district will begin to expend funds to incrementally prolong the life of these boats until a way is found to replace them. As the boats continue to age, these incremental investments will produce increasingly poor returns. The reality facing today's Ferry Commissioners is that the fleet will need to be replaced in the next 5-10 years.

If each boat in the Fishers Island fleet is to be replaced with a like-sized boat, the cost for each is likely to be \$11-15 million⁸. This means that in the next 5-10 years, the Ferry District will need to bond \$22-\$30 million in order to safely continue to serve the Island with regular ferry service at

8

Ballpark figure provided by Ferry District.

its current level. By charter, the district has a bonding limit of \$5 million, making it impossible to make the necessary upgrades under the current legislation⁹. The district has two other sources of revenue: receipts and taxes. Taxation power granted to the Ferry District is capped at around \$750,000 per year, and the New York State Property Tax Cap limits increasing that amount to 2% or the inflation rate per year, whichever is less. At present, this amount is fully incorporated into the annual operating budget.¹⁰

On the revenue side, rates could be raised in order to create a “reserve fund” (allowed by the enabling act) to purchase a future boat—but saving enough even for one boat, 10 years out would require \$1.5 million in savings per year. In 2011, revenues to the District from “Charges for services” totaled \$2,587,181, so a \$1.5 million increase would require increasing revenues by 37%. It is worth noting here that there is no projected growth in ferry usage (or revenues).

It may be possible to revise the enabling legislation for the Ferry District to allow for a greater debt cap, allowing the district to bond for what it needs, and to change its taxation limit to allow for the debt service on those bonds, but this would likely be a difficult, costly, and time consuming process.

Alternately, as a department in an Incorporated Village, it is presumed that the Village could raise the necessary funds through its bonding authority which would have a higher cap. According to *Bond Basics for Towns, Villages and Cities in New York State*:

Article VIII, Section 4 of the Constitution provides that no county, city, town or village shall

...contract indebtedness which, including

9 Fishers Island Ferry District, Chapter 699 of the Laws of 1947, Section 4.

10 The cap can be overridden under certain circumstances. See <http://www.empirecenter.org/special-reports/2011/11/proptaxcapguide113011.cfm>

*existing indebtedness, shall exceed seven percent (7%) of the five-year average full valuation of taxable real estate therein.*¹¹

Full Valuation of Island taxable real estate in 2012 is approximately \$728 Million, 7% of which would be \$51 million, sufficient to cover the cost of both boats.

Whether or not the Fishers is incorporated as a village, the cost of these two new boats will place a substantial new burden on either Fishers Island taxpayers or ferry ratepayers. The annual debt service on just one boat, figured at \$15 million, (financed through a 20 year municipal bond, 4% with level debt service) would be over \$1.1 million per year.

It may be possible to offset some of these costs through federal or state grants for transportation or smart growth. Funding opportunities should be investigated and pursued through state and national representatives and senators, as well as through the state department of transportation. Periodically, there have been grants that support rural ferry service, such as the “Transportation Equity Act for the 21-st Century (TEA-21)” which had special funding for ferry boats seen as reducing sprawl, which expired in 2003. A current list of transportation related funding opportunities is listed on the NYDOT’s website at www.dot.ny.gov/programs/smart-planning/funding.

Commissioners

Like the other special districts on the Island, finding Fishers Island residents who qualify to act as Ferry Commissioners is already becoming increasingly difficult: the current enabling legislation requires five commissioners, who must be elected from those who are “electors in the town of Southold and owners of real property on the Island.”¹² Though the requirement

11 Goodfriend, Douglas and Thomas E. Myers, *Bond Basics for Towns, Villages and Cities in New York State*. Orrick, Herrington & Sutcliffe, LLP: 2009.

12 Ibid., Section 5.

for voter registration combined with property ownership may seem to be a simple requirement to fulfill, when viewed in light of the overall Island demographics, there is a very limited pool of qualified applicants (likely fewer than 100). If Island demographics continue in their current trajectory, the enabling legislation will have to be amended to change one or both of these requirements.

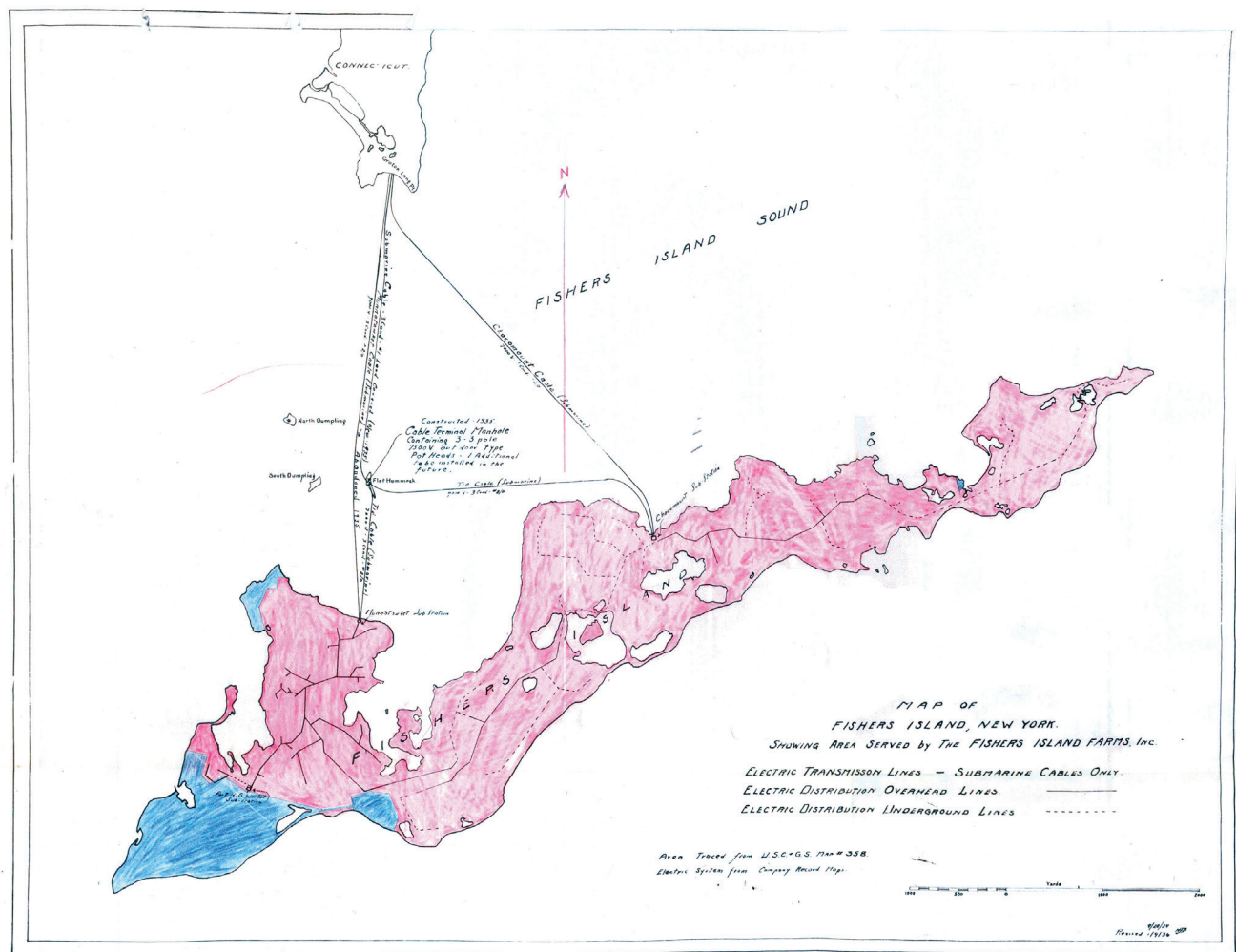
Utilities: Cost and Management

The cost of utilities on Fishers Island is a component in the overall high cost of living on the Island. This section addresses the current situation with utilities including electricity for lighting, cooking, heating and cooling, fuel oil for winter-season heating, and propane for heating and cooking. Potable water has been examined thoroughly in previous studies and appears to be a stable subject, and while supply and quality does not require additional study at this time, it should be noted that the water infrastructure is old and may be fragile. Sanitary sewer service is limited to the fort area of the Island and also was not identified as needing additional study as part of the project. Telecommunications, including telephone, television, and internet service are addressed in the next section, called Improving Telecommunications.

With the exception of fuel oil and propane, utilities on Fishers Island are all managed through a trifecta of operating corporations, substantially owned by and referred to as the “Fishers Island Utility Company” (UtilCo or FIUC) which provides management services to each. Managed under a single FIUC Director, the Fishers Island Electric Corporation resells electricity and provides electric distribution, the Fishers Island Telephone Corporation provides telephone, internet and alarm services, and the Fishers Island Water Works Corporation provides drinking water. Fuel oil is

Recommendations

- Assist home owners and business owners to reduce their energy bills by improving energy efficiency. Coordinate access to New York State energy efficiency improvement programs, including technical support, home energy assessments and grants and low interest loans provided by the New York State Energy Research and Development Authority (NYSERDA) and other agencies as applicable.
- Make electric rates for year-round residents competitive with nearby Connecticut towns. Consider reducing current year-round rates by 20% (and increase other rate classes to compensate for lost revenues) through the existing differentiated pricing system.
- Support new small businesses which are seen as in support of the goals of this plan, by creating an additional special class of commercial electric service or modifying the existing commercial class service to provide incentive pricing. The incentive could be elimination of demand charges for the first one, two or three years of operation.
- Support businesses which operate year-round by reducing or eliminating commercial demand charges during those months when excess capacity on the submarine cable is highest.
- If village incorporation is achieved, commission updated reports from a qualified engineer and/or an attorney on the costs and benefits of converting the Fishers Island Electric Company into a municipal utility, given the value of the company, current and future bond rate projections, availability of NYPA power, wheeling charges, and the current wholesale cost of electricity.



provided by the two on-island fuel companies, which both deliver oil and service equipment. There is no natural gas distribution system on the Island.

Electric Service

The cost of electricity was raised at many of our meetings with Island residents as a factor in the high cost of living on the Island. Currently electric service is provided by a private utility company, the Fishers Island Electric Corporation (FIEC), 51% of which is owned by the Fishers Island Utility Company (the balance is owned by the Fishers Island Development Corporation (FIDCO). FIEC purchases power from Groton, Connecticut (which gets its power from the New England Power Pool, NEPOOL). Power is transmitted from Noank in Groton, Connecticut via two underwater cables, one dating from 1989 and the other from 1967, to a point at the northern end of Crescent Avenue, west of West Harbor. In addition, there is a diesel generation station owned by the Connecticut Municipal Electric Energy Cooperative (CMEEC)

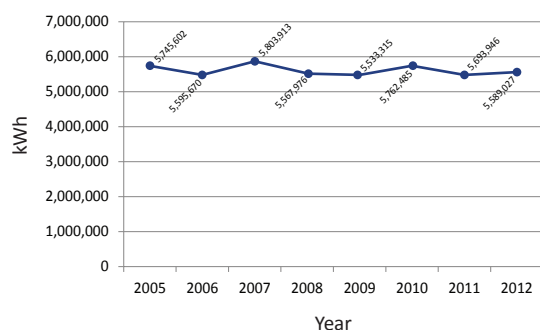
ELECTRICAL MAP showing undersea connections to the mainland from around 1936.

located on Central Avenue on West Harbor which is used for “peak shaving” at times of maximum demand in Groton, and can also serve in “island mode” during an emergency, providing enough power for the whole Island. According to FIEC, the system is relatively reliable, and recent studies have indicated that there are no near-term capacity issues.

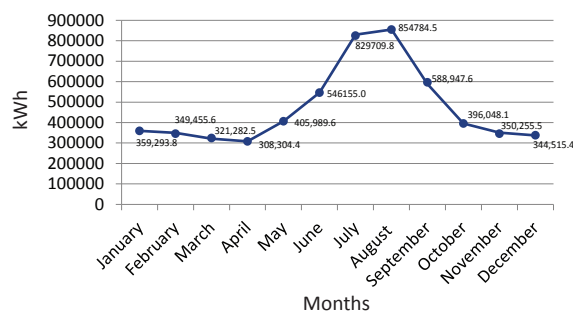
We examined current tariffs charged by the Fishers Island Electric Company and found that their rate structure, which includes three classes of residential service, is heavily weighted, with those customers classified as “year round”¹³ Island residents charged the lowest rates, those

¹³ Defined by FIEC as “annual true year round residential service for individual private residences”

Total Annual Electrical Consumption



Total Average Monthly Electrical Consumption 2005-2012



classified as “seasonal”¹⁴ customers charged higher rates, and those classified as “summer”¹⁵ residents, the highest rates. This intelligent differentiated pricing policy has two intentions: first, the equitable distribution of the year round costs of maintaining infrastructure, energizing transformers, and managing the system, and second, the desire to provide year-round residents with a more reasonable cost. This effectively means that seasonal and summer residents are subsidizing year-round residents through their higher rates. Currently, the cost for year round residents is slightly higher than what is provided in Southold by Long Island Power Authority (LIPA - see analysis below), but is not competitive with rates in adjacent Connecticut towns, which are generally lower. Because of Fishers’ physical connection to Connecticut, it is likely that new residents of Fishers would more likely compare cost of living to New London or Groton than to Southold or Suffolk County. This report recommends that the current differentiated pricing policy be geared to become competitive with these nearby Connecticut towns. At this time, a reduction in the year round rate of 20% would accomplish this goal. Commercial customer rates are higher than LIPA, but not substantially so at consumption of less than 800 kWh per month. However, commercial rates on Fishers can be affected by provisions for “Demand Charges” once a customer exceeds 800 kWh per month

for two consecutive months. This provision is designed to protect the submarine cable from excessive demand, and effectively favors small businesses while discouraging more energy intensive businesses and industrial uses on the Island. While in general, this policy is appropriate given the overall goal of maintaining the character of the Island, it is recommended a mechanism be created to assist in the establishment of new small businesses on the Island. This report recommends that FIEC either create a new special class of electrical service or modify the existing commercial class of service to provide for this kind of incentive to businesses which are seen by the community as in support of the goals of this plan. One possible incentive might be that demand charges be deferred for one, two or three years after the establishment of a new business on the Island, or phased in over three years.

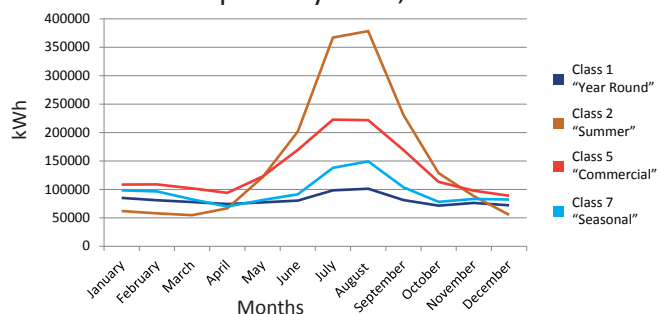
This report also recommends that commercial rates be seasonally adjusted to encourage year round businesses. Currently monthly electric consumption in June and September is twice monthly consumption between October and May, and monthly consumption in July and August is three times monthly consumption between October and May (see graphs, this page). One possibility for a seasonal adjustment is to eliminate demand charges, or increase the consumption threshold for when the charges kick in, during the October – May off season when excess capacity is at its greatest. However, a qualified engineer should review current capacity and historic figures of total maximum demand on the submarine cable and distribution infrastructure before making this kind of a modification.¹⁶

14 The “seasonal” category includes customers who do not have their permanent domicile on Fishers Island, and whose Winter (October-May) consumption exceeds the previous summer (June-September) consumption.

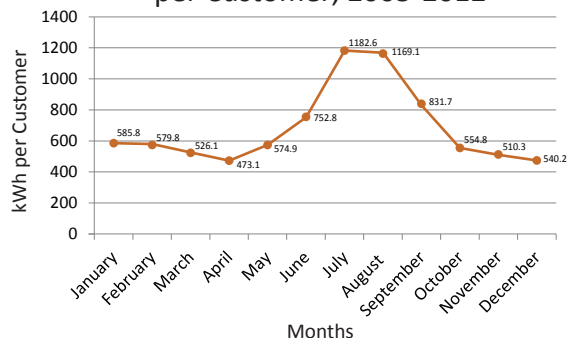
15 Summer residential includes customers who do not have their permanent domicile on Fishers Island, and is defined as “those residential customers who consume more electricity during the four summer months (June-Sept.) than during the eight winter months (Oct. – May).”

16 “Consumption” is the total amount of energy used, measured in kWh or kilowatts hours. “Demand” is the

Total Average Monthly Electrical Consumption By Class, 2005-2012



Average Monthly Consumption per Customer, 2005-2012



Analysis

We reviewed residential electric rates for three surrounding areas to compare with Fishers Island. These included Long Island Power Authority (LIPA) which provides power for Southold, New York, Connecticut Light & Power (CL&P) which provides power for New London, Connecticut, and Groton Utilities in Groton, Connecticut. We began by looking at the Class 1 rates on Fishers Island, which is the rate charged to rear round residential uses, and we calculated an average monthly bill based on 740 kWh (kilowatt hour) usage¹⁷. Nomenclature, service classes, and method of calculating charges varied significantly between vendors. We compared charges for August 2013 where possible, including the base charges for management, generation, and delivery while excluding government taxes and fees, special charges, and credits. It should be noted that each of these rates has a provision for some sort of a fuel surcharge which we included in these examples. Due to the complexity of variation in the charges, these should be considered as “back of the envelope” calculations and are only intended to indicate the difference of magnitude cost for each utility.

Fishers Island Electric Company

We calculated charges for FIEC based on rates published both online and in “Schedule for

Electric Service Applicable in Fishers Island, NY” on file with the New York Public Services Commission, effective 7/1/2009, and an August bill. Service Classification No.1 is for “annual true year round residential service for individual private residences....” Service charges include a *Minimum Charge* of \$10.60 per meter/month, + \$0.1790 per kWh for the first 1,000 kWh and \$0.2067 beyond the first 1,000 kWh. There is currently an additional \$0.01645 *Fuel Surcharge*. For our 740 kWh base case, the total service charges would be \$155.23.

Long Island Power Authority (LIPA)

LIPA provides power for Southold, Long Island and we calculated charges based on rates found in “Common Residential Electric Rates, 2012” available at www.lipower.org/residential. We calculated charges based on *Rate 183* which applies to residential units with electric water heaters. LIPA's service charges are \$0.36/day and energy charges include \$0.0857/kWh for the first 250 kWh and \$0.0975/kWh in excess of 250 kWh. For our 740 kWh case, the total service charges would be \$69.20. In addition, LIPA charges a fluctuating rate for *Power Supply* based on the market. The rate for August 1, 2013 was \$0.092574 / kWh. The total for Power Supply is therefore \$68.50, for a total charge of \$148.50.

Groton Utilities

Groton Utilities electric rates are published on www.grotonutilities.com/electric.asp?l+4 and we used the “Residential Electric Rate Schedule (Rate: RS).” There is a *Customer Charge* of \$11.50 per month, plus \$0.13774 / kWh Energy Charge, and an additional \$0.02517 *Purchased Power Adjustment*. For our 740 kWh case, this is a total of \$126.87.

immediate rate of consumption, in kW. If total demand at a given point in time were to exceed the capacity available on the submarine cable, it would be damaged, knocking out the whole Island.

¹⁷ For Average monthly consumption, we used the Connecticut data as published in U.S. Energy Information Administration, *Electric Sales, Revenue, and Average Price (with data for 2011)*, Table 5.a, “Residential Average Monthly Bill by Census Division, and State,” available online at www.eia.gov/electricity/sales_revenue_price/



Connecticut Light & Power

CL&P provides power for New London, Connecticut, and its rates and tariffs are published online at www.cl-p.com/Rates/Rates_and_Tariffs/?MenuID=4294985396. We used Rate 1, Residential, non-heating service. Charges consist of a *Distribution Customer Service Charge* of \$16.00 / month, and generation, distribution, transmission, and other charges of \$0.14198 / kWh. For our 740 kWh case, the monthly total is \$121.07.

These examples illustrate that Fishers Island's electric rates for year round residents are slightly more than those paid in nearby Long Island towns, and significantly higher than adjacent Connecticut towns. We also examined Fishers other two classes of residential service. Class 2 "summer residential" units pay approximately double the rate of year-round residents--for the same 740 kWh / month usage give a total of \$297.22 per month. Class 7 includes "seasonal residential" and total charges on the same case would be \$215.30. Both these classes include service charges that must be paid monthly, year round, whether or not power is used, so the effective monthly rate would be higher if no power is used during off-season certain

months.

It is clear from these examples that the FIEC's current pricing policy does give priority to year-round residents, and this policy should continue in support of the goals of this plan.

Reducing the Cost of Electric Supply

It may be possible to reduce the cost of electric supply on Fishers Island—the potential of converting Fishers Island Electric into a public utility was raised a number of times during this project. This kind of legal conversion may only be undertaken by a municipal government—in the case of Fishers, the Town of Southold could choose to operate a municipal utility, or a future incorporated Village of Fishers Island could do so. The municipal utility would have to acquire the Company's physical plant from its current owners through purchase or condemnation. A base value would need to be established and agreed upon by the sellers. The benefits to ratepayers of becoming a municipal electrical system include lower corporate tax rates than private utilities, and an entitlement to low-cost hydropower supplied by the New York Power

Authority (NYPA).¹⁸ In 1987, the Town of Southold commissioned R.W. Beck and Associates to determine whether a Fishers municipal electric company would realize a savings for ratepayers. In their report *Fishers Island Municipal Electric System*, given assumptions from the time about generation costs, consumption, and bond rates at that time, a $\pm 10\%$ rate decrease could be realized by ratepayers if the existing private utility were converted to a municipal utility and NYPA power could be purchased. These assumptions would be somewhat different today, and according to a recent study by attorneys Harris Beech, the waiting list for NYPA power is filled through 2025, so this lower cost power might not be available to the Island for some time if it came available at all. However, if some or all of the owners were willing to agree to a price that is substantially less than book value, the corresponding debt load required to acquire the utility would be diminished, further increasing the savings to ratepayers. If village incorporation is achieved, it is recommended that the new village government commission a new engineering report and legal brief to determine whether conversion of FIEC to a municipal utility would be in the interest of current ratepayers.

It is worth noting here that a small portion of the cost of water on the Island is attributable to electricity to run pumps. If rate payers saw a reduction in the cost of power, they would likely also see a slight reduction in the cost of water as well.

Propane and Fuel Oil

The bulk of heating on the Island is powered by fuel oil or propane. Fuel oil on the Island is currently supplied by the two fuel companies, Z&S Fuel Service and Goose Island Corporation, which in turn purchase fuel from mainland wholesalers

18 Discussion of conversion of the Fishers Island Electric Company to a public utility is discussed on page 3, Fishers Island Civic Association, *Incorporation Study Report*, 1985, and the 1987 *Fishers Island Municipal Electric Study* prepared by R.W. Beck and Associates.

THE FISHERS ISLAND UTILITY COMPANY

The Fishers Island Utility Company was organized in 1965 by thirteen residents of Fishers Island to purchase the assets of the Fishers Island Farms because of the terminal diagnoses of Mr. H. Lee Ferguson.

At the time of purchase the Farms consisted of a contracting company, the Mobil Station, 51% of the Fishers Island Telephone Company, 51% of the Electric Company and 40% of the Fishers Island Water Works and the Apartment Building at the Fort which then became the Fishers Island Utility Company.

In 1969 the one of the major shareholders of the Company entered into an agreement to sell the Company to another local businessman. The sale was never consummated because there was an agreement by and between the shareholders that to sell shares in the company they first had to be offered to the Company. The agreement was complied with and the shareholder sold his shares back to the Company. A new board took over headed by Mr. Harris Parsons and some additional shareholders were recruited.

The new Board decided to reconstitute the company by divesting all the non-utility assets and so sold the contracting company, the Mobil station, and the apartment building leaving only the Utility Operations. The Company remains in that form today. While some of the shareholders have changed the company is operated by a non-paid board of directors and the rates for Electric, Telephone and Water are set by the New York Public Service Commission.¹

1 History of FIEC provided by John Spofford

and have their own trucks to distribute on the Island. Propane is also provided by two services, Island Fuel Service and Suburban Propane. As one would expect, prices on the Island are higher than their mainland counterparts. A fuel cooperative was suggested as a possible way to reduce the cost of fuel oil and gasoline on the Island. Fuel cooperatives are often organized in areas where costs are high, or in rural areas where supply is limited, and the United States Department of Agriculture (USDA) provides technical assistance to those wishing to set up cooperatives.

The most basic fuel cooperative functions by pooling demand among geographically proximate customers, and then negotiating a price from a supplier by guaranteeing a certain number of contracts. Competitive bids are sought from multiple companies to get the best price possible, and discounts on service contracts are also often part of the bid. There are number of the co-ops in the area, including the Citizen's Oil Co-op in Hartford, and the Prospect Oil Group in Prospect. These groups realize savings of between 10% and 20%, as well as savings on service plans, which might result in a \$100-\$200 annual savings. The "co-op" entity in this case simply negotiates the contract, but then the contract is between the consumer and the oil company. One drawback of this kind of set up is that the best rates would likely be procured from an off-Island company, which could mean that emergency services could be difficult to procure.

A more elaborate fuel co-op could actually function as a distributor, buying fuel wholesale, bringing it to the Island and storing it, distributing it, and providing maintenance contracts. In other words, the co-op would provide the same service that an oil company currently provides. The co-op would need to purchase or construct its own infrastructure, including storage tanks, fueling stations, and one or more fuel trucks, and would need professional management. Like a municipal electric utility, It is possible that some cost savings could be provided by this model, as the co-op

could potentially be set up as a non-profit public service corporation which might relieve it of paying taxes, and its main function would be to provide the lowest price for consumers without a profit motive for the investors. However, detailed financial analysis is beyond the scope of this report. To provide the greatest cost advantage, this type of co-op would likely need to provide the bulk of Island fuels, likely putting the existing companies out of business.

Improving efficiency

In the short term, the cost of fuel oil, propane and electricity will remain high for most Island consumers. The primary strategy to reduce overall utility costs in this situation is to increase efficiency in existing residences and businesses, and to utilize best practices for energy efficient buildings for all new construction in the fort area. Some of these practices for energy efficiency are discussed in the housing section above, and include high performance windows, superinsulation, passive heating and cooling, and strategies like operable windows and thermal mass and high efficiency HVAC systems. Plug load can be decreased through the use of Energy Star rated appliances and lighting load through use of natural day lighting and LED or CFL bulbs.

For home and business owners, programs managed by the *New York State Energy Research & Development Authority* (NYSERDA) (www.nyserda.ny.gov) including free energy audits, grants and low interest loans can provide financial and technical assistance to reduce overall energy costs. Some NYSERDA programs are administered through local utility companies and discussion with FIEC staff suggests they would be open to assisting Island consumers with applications to the extent that their staffing allows. It is likely that accessing appropriate contractors approved by NYSERDA may require some coordination given the geographic remoteness of Fishers from New York state – this could be managed either by the Utility Company, by a future local development corporation, or by a village government on the Island. In any case, Islanders

should be made aware of how they can access this great resource.

Other sustainable technologies should also be considered as was to reduce energy consumption in combination with improved efficiency measures. These include solar hot water, photovoltaic, micro-wind, and geothermal. Unfortunately, current Island infrastructure is not capable of allowing net metering, the process where customers who have their own renewable energy facilities such as photovoltaic panels or windmills, can sell excess power back to the grid. This is a physical limitation of the energy distribution system currently in place, not a policy of FIEC, and upgrading the infrastructure is likely cost prohibitive. The effect of this is to increase the payback time for some sustainable technologies which work best when net-connected, such as photovoltaic arrays or micro-windmills. These may still be effective technologies for those wishing to reduce their carbon footprint while not necessarily looking to reduce operating costs. Other specific sustainable technologies will likely produce a cost savings in a shorter time, and should be examined on a case by case basis. The first of these is solar hot water, which given Fishers' electric rates would easily have a payback of less than 10 years over electric hot water and depending on financing. Ground source heat pumps should also be considered in new construction and retrofits, particularly in situations where air conditioning is provided in the summer months.

Improving Telecommunications Services

If the types of creative businesses and jobs described in this report are going to develop and flourish on Fishers Island, the quality, speed and reliability of telephone and internet services must be improved. Whereas for current residents of the Fishers Island's summer and seasonal colony, internet and telephone service limitations are

seen mostly as an inconvenience, for owners of the kinds of small, creative businesses and remote workers described elsewhere in this report, who will use the Island as a physical base but do their work in connection with remote employers, customers and services, reliable telecommunications services are a critical factor in their feasibility. Additionally, current Island businesses and institutions, such as the Fishers Island School, fire and police, and regular residents, both year round and seasonal, would benefit from improved service.

Anecdotal evidence gathered from residents and business owners we interviewed suggest that the limitations of the current services are serious enough to be considered a barrier to business on the Island. These limitations include, on the telephone side, incoming and outgoing calls which do not connect, disconnected calls, latency and poor call quality; on the internet side, service interruptions, grey-outs, limited throughput, and limited bandwidth. It appears that most of these problems arise not from the on-island infrastructure, but instead from the limitation of the wireless link between the Island and the mainland infrastructure or from other mainland issues.

The current internet service on Fishers Island is provided by the Fisher's Island Telephone Company, which is a privately owned utility, but which, like other Island institutions, operates more in the public interest than out of a profit motive. The TelCo purchases internet service from a Groton-based provider, and resells and distributes the service on the Island. It owns the physical distribution infrastructure, and service is received, via licensed microwave uplink from Groton / Long Point, at a microwave receiver in the fort area of the Island. An aerial fiber-optic cable connects to the receiver to the Utility Company building, located on the Island Green.

Detailed discussions with the Fishers Island Telephone Company indicate that they understand

the current service limitations and are working proactively to find short term and long term solutions. Short term solutions, which may involve modifications to the microwave uplink, can make incremental improvements to the service, but ultimately, reliable high speed internet capable of voice over IP (VoIP) service, and with enough capacity to handle extensive delivery of video services to the Island, will require an underwater fiber optic cable connecting the Island to the mainland. This likely represents a substantial capital investment of \$1 million or more, which would need to be bonded and the cost passed along to ratepayers, or subsidized through grants. Alternately, an incorporated village government, if established, could potentially bond an underwater cable as an infrastructure project through lower cost municipal General Obligation bonds, paid for through property taxes.

Over the summer of 2013, the TelCo investigated federal grant opportunities from the Rural Development wing of the United States Department of Agriculture that could support broadband upgrades, and solicited letters of need and support from Fishers Island institutions. During this process they identified many potential benefits that would be provided by reliable, high speed internet, including:

Public Safety: Improved communications for public safety agencies, including enhanced 911 services for improved response times; more robust and response amber alert system; enhanced police response

Healthcare: Access to virtual healthcare networks and systems, including remote diagnosis, immediate assessment and guidance to emergency workers via video-conferencing, improved access to medications through online ordering; access to Telehealth to exchange large digital files and provide remote specialty consultation

School: Ability to expand and improve the

school's access to online instructional resources and distance learning including resources like journals, news, and video, college courses

Government: Access to e-government services, including online permitting, information, healthcare (including healthcare.gov), and other important programs; access to online training and collaboration; reduced travel time and travel costs; connections between government entities off Island and local groups.

Business: Year round business access to customers; access to e-commerce solutions and credit card transactions; automated inventory fulfillment systems; web sales and online advertising; online networking through social media; commodities and securities trading; access to latest software and services available; access to professional and financial services

Personal and professional development: access to online higher education and distance learning; online training and certification.

General Communications: improved and enhanced voice service through Voice over IP; access to television through video streaming; ability to video-conferencing

It is clear from this list how much of the Island is impacted by internet service and how profound an impact improving it could have, yet Island response to the TelCo's request for supporting letters was weak. Island residents and institutions, to the greatest extent possible, should support efforts by the TelCo to make critical improvements to broadband service.

Recently the TelCo has been working with the Fishers Island School to look for ways to comply with new requirements of the New York State *Partnership for Assessment of Readiness for College and Careers* (PARCC) standard, which requires exams to be administered online by 2014. Beyond these online exams, new distance

learning opportunities are being incorporated into the curriculum allowing for a greater diversity of subjects to be available to students, which require substantial new capacity for delivery – see Fishers Island School in Chapter IV.

The demand for additional bandwidth will only continue to grow as more and more content is delivered over the internet instead of through traditional printed, telephonic or television systems. Broadband internet must be understood on Fishers Island as a critical utility, as important and necessary as the ferry or electricity, and supported as such. As part of the package required to attract new residents to the Island, including entrepreneurs, new small businesses, employees and telecommuters, improvements to broadband service is an absolute requirement. Improvements to broadband will not only allow people on the Island to access new ways of doing business, it will benefit everyone on the Island.

Recommendations

- Work with the Fishers Island Telephone Company to improve internet service speed, reliability, bandwidth and throughput to support and attract new businesses, remote working, distance learning and social connections to the mainland. Look for near term solutions for expanding service using existing or upgraded infrastructure, and plan for long term investments required to link the Island to the mainland by underwater fiber optic cable.
- Support efforts by the Fishers Island Telephone Company to secure federal grants from the Rural Development agency of the United States Department of Agriculture or elsewhere to fund broadband improvement projects.
- Work with the Fishers Island School and Telephone Company to make sure broadband service is sufficient to meet the needs of students accessing distance learning resources, research materials, and online media, as well as state mandated requirements for online exam administration. Investigate opportunities for state and federal grants to support this kind of infrastructure for education.
- Support the Fishers Island Utility Company's efforts to develop complete GIS mapping of the Island's utilities to better understand the condition of and manage the Island's water, electric, and telecom distribution infrastructure. If incorporated, consider developing and maintaining a municipal GIS database for the Island.
- Establish a targeted technology improvement zone within the fort area to support future commercial use.



Getting it Done: Governance and Finance



Getting it Done: Governance and Finance

Fishers Island needs to anchor its future in a government of its own.

Towards Village Incorporation

Fishers Island needs to anchor its future in its local government of its own. Decisions about Fishers Island should, in so far as possible, come to be made on Fishers Island by people who have committed their time, labor, and money to this place. The Town of Southold obviously isn't local in the required way. Such devices as Business Improvement Districts (BIDs), Community Development Corporations (CDCs), and Local Development Corporations (LDCs) may have important uses on Fishers, but none offers governmental authority. As Fishers Island moves forward to implement the several major recommendations made in this report, it will need to back them up with the authority of its own small government.

	Has Governmental Clout	Lacks Governmental Clout
Fishers Local Fit Adequate	Village of Fishers Island	Island Community Board
Fishers Local Fit Inadequate	Town of Southold	Most Organizations, Yale Group

Beyond local fit, accountability matters a great deal: If you don't know whom to praise or blame, you aren't really being effective. Accountability in the Village of Fishers Island would flow from the affected residents to the Mayor and a Village Board of Trustees, and from them to the senior staff member(s) directing the work of village employees. The Village Manager should be among the most important people in the Island.

Feasibility of Incorporation:

We believe that Fishers is eligible for Village Incorporation under New York law. The pertinent statute¹ has only one provision which could provoke the slightest doubt on this: one needs to have “a population of at least five hundred persons who are **regular inhabitants**” [emphasis added] where that last term is defined to mean: “persons residing in the territory proposed to be incorporated except such persons who themselves maintain a residence outside such territory which is used as their address for purposes of voting.” It would be necessary to specify a list of 500 Fishers persons, counting minor dependents, who possess no voting address elsewhere at the time of incorporation. There is no reason to believe that those same persons could not take up a voting address elsewhere at a later date without endangering the village once it had been incorporated (72 current New York Villages claim fewer than 500 such persons.)

Process of Incorporation:

We recommend that the Island Community Board designate a ‘Committee for the Incorporation of the Village of Fishers Island’ to organize and oversee the process of incorporation. This committee should of course be representative of the regular inhabitants, and should be provided with one more or less full time staffer for a period of up to a year. A chairperson of considerable leadership skill should be found. Legal counsel will be necessary and should if possible be engaged on a services performed basis not on a billable hourly basis.

The New York statute is a formidable document,

richly larded with duties, forms, procedures, reviews of procedures, waiting periods, elections, notices of elections, reviews of same, and so forth. The statute will govern many aspects of village formation, and of its eventual structure. One provision (in 2-254) reads thus:

If on the date of incorporation of a village the limits of the village are coterminous with the limits of, or wholly include, the territory of a district, such district shall cease to exist at the end of the fiscal year of such district next following the first day of June following the first day of January next succeeding the date of incorporation; except as otherwise provided in this section, the powers and duties of the governing body of the district and of all the officers of the district in connection therewith shall then cease and determine; and any board of commissioners, any office of commissioner and any other office of any such district shall also cease to exist at such time.

Some of the Fishers Island tax districts will presumably be dissolved by 2-254. They will, almost certainly, need to be replaced by organs of Village government. Others, notably the school and ferry districts, would likely continue. In every case, a careful discussion of sensible options should occur early in the incorporation effort. Seeking out efficiencies and synergies should occur at this early stage. It would appear that an on-island series of meetings should occur in which each of the Fishers Island tax districts is walked through the choices available, and in which the incorporation plan is shaped around the agreed decisions.

Early on after the tax district confab, the Committee should establish working contact with relevant officials in Southold including Town

1 Particularly Article 2, Part 2-200. The full statute on village incorporation is readily available at: http://www.weblaws.org/new_york/laws/n.y._village_law.

Supervisor and the Town Board Member from the Island. Even though the Board Member from the Island is accountable to all of Southold's electorate, he/she is well positioned to help navigate on behalf of Fishers Island Village. It is important that these people come to hold 'ownership' in the process of incorporation.

Incorporating a New York Village is as much a marriage as a divorce. The new village remains affiliated with the town, and its citizens remain citizens of the town. Certain powers are set aside

for the village as a result, but the non-village parts of the town stay on as in-laws, so to speak. Fishers Island should endeavor to negotiate favorable terms, but cannot in the long term profit from the emergence of an adversarial relationship to the town or its officials.

The Committee for Incorporation should produce a fairly detailed incorporation plan. A shorter printed document, and/or an e-document should be circulated to everyone having a permanent stake in Fishers. A series of meetings should be

Recommendations

- Develop a realistic implementation strategy, schedule and assignment of responsibilities for this plan.
- Proceed with Village Incorporation. Establish an Incorporation Committee under the auspices of the Island Community Board to organize this effort. Retain legal counsel and establish a timetable for Incorporation.
- Determined with legal counsel, and the Town of Southold, Suffolk County and State of New York as needed, the precise administrative and financial status of Fishers Island going forward, and procedure and timetable for realizing that status.
- Develop administrative and financial agreements with Town of Southold and/or State of New York to establish specific responsibilities for administration, services, land use planning, and infrastructure.
- Once incorporated, elect a Mayor and Trustees, and hire professional staff with responsibility for managing the Island and executing projects.
- Establish a recruitment and retention office or advocate (a "population czar") that works on behalf of the Island to retain and attract residents. Develop a recruitment package to be given to those who might want to move to the Island as a year round resident.
- Maintain and support the volunteer structure of the fire department, EMT and Sea Stretcher. Provide incentives for new and existing year-round residents to volunteer.
- Establish clear and realistic phased targets for population growth and development a system for monitoring progress.
- Purchase or transfer ownership of all town owned property to the Village government so it may be managed from the Island.
- Establish an ongoing community-based planning and evaluation process that regularly reviews and updates of assets, threats and opportunities.

organized by the Committee for Incorporation, and should be staffed by trained moderators as may be deemed appropriate.

Political and Political Economy Hazards of Village Incorporation:

The road to incorporation runs through a few somewhat risky intersections. These are:

The effective engagement of the ‘regular inhabitants’ who will form the Village electorate needs to be well-managed, and persuasive from the start. Special attention should be paid to persons who now vote elsewhere, yet who are to be included in the set of ‘regular inhabitants.’ A petition needs to be signed either by 20% of Island residents or by Island owners accounting for at least 50% of the taxable property.

The interconnections between the Island tax districts and the new village need to be worked out early, and will require leadership of high quality going forward. Unless there exists an agreed-upon division of labor and authority from day one, wasteful and destructive bickering would be a risk.

The “Decision as to Legal Sufficiency” (2-208) puts the incorporation’s future in the hands of Southold Town Supervisor Scott Russell. He is asked to hold a hearing, whose purpose is “to determine only whether the petition and the proposed incorporation are in conformance with the provisions of the Village Law. Other considerations and objections to the incorporation are not at issue.”² Narrowness here is good.

On the other hand, we are negotiating something analogous not to a divorce or first marriage, but to a second marriage between the same partners. Good will on both sides of the table is essential. In advising on Village-town relations, the relevant

state document opines that “Fiscal relations continue to be a source of contention between towns and villages. Village residents are liable for payments of taxes to the towns in which their village is located, as well as to the village....”³ The major exception is that Village residents will not be liable for repair and improvements to town highways on the mainland.

The 1st Board of Trustees (includes a Mayor and an optional Deputy Mayor) will be elected shortly after incorporation. It needs to be very strong, since it will then have the authority to design nearly all other aspects of village government. Perhaps even more important will be the selection and recruitment of the first Village Manager or Coordinator.

Modeling a Government for Fishers Island

According to the New York State Village Law, every Incorporated Village should have the following officers:

- A Mayor, elected by the Village
- Four Trustees, elected by the Village
- A treasurer and clerk, to be appointed by the Mayor and Trustees

The Village Law allows the Board of Trustees (consisting of the Mayor and four elected Trustees) to determine whether other officials are required for the running of the Village. These include up to two village justices (which would be elected), one or more assessors, and other officers as required.

Per recommendations made elsewhere in this report, we have proposed that the Mayor and

2 New York State Local government Handbook, 2009. Available at http://www.dos.ny.gov/lg/publications/Local_Government_Handbook.pdf.

3 Handbook op cit.

Trustees be unpaid elected positions, and that they appoint or hire a professional Village Administrator to be in charge of the management of the Island. The Administrator would have a small professional staff, including administrative support and a "Population Czar/Development Director" whose job would be to support the year round population, recruit new year round population, and generally assist in executing the recommendations of this plan and future planning efforts.

Planning and Zoning would come under the control of the village government. It is assumed that a Planning and Zoning Commission would be established for the Island, and that professional planning assistance and zoning enforcement would be provided on a contractual basis, as it is in many small communities.

Management of the Island physical plant would be accomplished by a Department of Public Works, led by a Village Engineer, whose office would be combined with that of Building Inspector. The DPW would manage maintenance of the Island's public assets, including streets, sidewalks, snow clearing, etc., and would also manage sanitation and sewers.

The Ferry District would become a department of the village government.

Public safety would remain much as it is now – two half time constables and a bay constable would provide police protection, and the fire department, EMS, and Sea Stretcher would remain as they currently are. It is assumed that the State would continue to provide New York State Troopers for part of the year.

A physical Village Hall or Village Office would be required, consisting of office space for the aforementioned staff, a vault for permanent file storage, and space for servers and other information technology. IT infrastructure for the government would be managed on a contractual, consulting basis.

The structure and form of this village government was developed from assumptions about the types of activities that will be required for the efficient management of the Island, and a review of the governments of other villages in the state. While it does not represent an absolute minimal government, it does represent, in general, a realistic idea of what will be needed. Ultimately the decision about the precise government makeup would fall to the first elected Mayor and Trustees to determine, after negotiation with the Town of Southold.

What would the total annual operating budget of the Village of Fishers Island be?

To project what the annual operating budget of the Village of Fishers Island might be, exclusive of capital expenditures, we began by reviewing in detail at the annual budget provided in the *Fishers Island Civic Association Incorporation Study Report* of 1985, Attachment #9. The budget is broken down into four funds, General Government, Public Safety, Community Service, and Employee Benefits. There is also a fund for Revenue Other Than Taxes. Total projected expenditures for 1985 were \$140,200 with revenues other than taxes of \$32,500, for a total tax levy of \$107,700.

As a first exercise, we projected what this budget would mean in today's numbers. We increased each line item by 117%, the overall inflation rate between 1985 and 2013⁴. This produced a 2013 budget of \$280,364 (see table, opposite page). To verify some of these figures we obtained the budget of the Village of Rye Brook and compared the kinds of categories, as well as the individual

4 We calculated the inflation rate by using the Consumer Price Index, as published by the Bureau of Labor Statistics, which for 1985 was 107.6 and is estimated for 2013 to be 233.5. To calculate an inflation rate, we divided the 2013 CPI (233.5) by the 1985 CPI (107.6), for an increase of 2.17 times or an inflation rate of 117%.

Annual Village of Fishers Island Budget (based on 1985 Incorporation Report)				
		1985 Figure	Inflation Rate 1985-2013	Inflated Number for 2013
EXPENDITURES				
	<u>General Government</u>			
A1010.0	Board of Trustees	\$4,000	117%	\$8,680
A1110.0	Village Justice	\$5,000	117%	\$10,850
A1210.0	Mayor's Office	\$2,000	117%	\$4,340
A1320.0	Auditor	\$700	117%	\$1,519
A325.0	Treasurer	\$5,000	117%	\$10,850
A1355.0	Assessment	\$100	117%	\$217
A1410.0	Village Clerk's Office	\$20,000	117%	\$43,400
A1420.0	Law	\$10,000	117%	\$21,700
A1440.0	Engineer	\$3,000	117%	\$6,510
A1450.0	Elections	\$1,000	117%	\$2,170
A1620.0	Buildings	\$10,000	117%	\$21,700
A1910.4	Insurance	\$6,000	117%	\$13,020
A1920.4	Dues	\$600	117%	\$1,302
	Total General Government	\$67,400	117%	\$146,258
	<u>Public Safety</u>			
A1320.0	Police	\$20,000	117%	\$43,400
A3410.0	Fire	Fire District Budget	117%	n/a
A3620.0	Bay Constable	\$2,000	117%	\$4,340
A3510	Safety Inspection	\$3,000	117%	\$6,510
	Total Public Safety	\$25,000	117%	\$54,250
	<u>Community Services</u>			
A1490.1	Public Works		117%	\$0
A1620.4	Building Department		117%	\$0
A8010.0	Zoning	\$1,000	117%	\$2,170
A8020.0	Planning	\$2,000	117%	\$4,340
A8090.0	Environmental Control	\$2,000	117%	\$4,340
A5110.0	Street Maintenance	\$20,000	117%	\$43,400
A5142.4	Snow Removal	included above	117%	n/a
A7110.0	Parks and Beaches	\$1,000	117%	\$2,170
A8160.1	Refuse and Garbage	Garbage District Budget	117%	n/a
	Community Services Total	\$26,000	117%	\$56,420
	<u>Employee Benefits</u>			
9030.8	Social Security	\$3,000	117%	\$6,510
9040.8	Workman's Comp	\$2,000	117%	\$4,340
9060.8	Hospital and Medication	\$2,000	117%	\$4,340
9010.8	Retirement	\$3,000	117%	\$6,510
9055	Insurance	\$800	117%	\$1,736
	Total Benefits	\$10,800	117%	\$23,436
REVENUES				
	<u>Revenues other than Taxes</u>			
2110	Zoning Fees	\$500	117%	\$1,085
2555	Building Permits	\$5,000	117%	\$10,850
2590	Mooring Permits	\$5,000	117%	\$10,850
2610	Fines	\$3,000	117%	\$6,510
3001	State Aid	\$4,000	117%	\$8,680
3005	Mortgage Tax	\$5,000	117%	\$10,850
4001	Federal Revenue Sharing	\$5,000	117%	\$10,850
1130	Utilities Receipt Tax	\$5,000	117%	\$10,850
	Total Other Revenue	\$32,500	117%	\$70,525
	TOTAL EXPENDITURES	\$129,200		\$280,364
	TOTAL REVENUE	\$32,500		\$70,525
	NET TAX LEVY	\$96,700		\$209,839

personal services costs and other departmental costs of each fund type, finding that many of the Fishers Island figures for each category were low on a unit basis, and that there were also a number of categories not included in the Fishers 1985 budget. The 1985 budget seems to have represented a skeletal government, without professional staff or administrative support.

In response, we developed a new, more detailed budget using the 1985 budget and the Rye Brook budget as starting points, and keeping in mind the general government structure proposed above. We included in the budget the total budgets of each of the Fishers Island special taxing districts, but did not include the School District (In Southold, school district budgets exist outside of the town budget). We did not take into account management efficiencies that might be gained through central management of these districts. Other assumptions about how the government would work include:

- The Mayor and Trustees receive no salary or benefits
- The role of managing the Island would be carried out by a full time professional Island Administrator who would be appointed by the trustees
- Under the Island Administrator's supervision would be a full time "population czar / development director" and a 7/10 time administrative assistant
- The trustees would appoint a Treasurer (whose job would incorporate the assessor) at ½ time
- The trustees would appoint a full time Village Clerk, with a 3/10 time deputy clerk.
- The trustees would appoint a Village Engineer / building inspector at full time
- Village Hall would consist of office space for the aforementioned staff, a vault for permanent

file storage and management, and information technology areas.

- Information technology services would be purchased through consulting
- The police department would continue to be two constables and a bay constable, all at half time
- The Fire department, Ferry District, Library, and Waste Management District budgets would remain unchanged. In a more detailed analysis, management synergies might be found to incrementally reduce each of these budgets
- Village planning and zoning enforcement would be performed by a consultant
- Employee benefits on personal services are calculated at a fringe rate of 37.4%

Costs indicated in this budget are "educated guesses" based on adjusting figures from the Rye Brook budget and looking at salary statistics available online. Budgets of other New York State Villages were also reviewed. The only capital expenditures included in this budget is \$40,000 for street maintenance.

In this projection, Annual Village Expenditures total \$5,869,676, of which the former tax districts, excluding School, represent \$4,965,487. The difference between these numbers, \$904,189 represents the added cost of having an on-island government. It is important to note that this number primarily represents only the cost of staffing and office space, and does not include capital investments or debt service on bonds that might be issued on future projects. Also, revenues other than those included in the budgets of the taxing districts have not been included in this calculation, as we currently have not data to allow us to project those revenues.

FISHERS ISLAND - SUMMARY	
REVENUES	
FERRY DISTRICT	
Ferry Receipts	\$2,694,168.00
Unexpended Balance	\$281,669.00
Ferry District Total	\$2,975,837.00
SEWER DISTRICT	
Disposal Charges	\$2,421.00
Unpaid Sewer Rents	\$30,000.00
Interest and Earnings	\$50.00
Unexpended Balance	\$2,129.00
Sewer District Total	\$34,600.00
WASTE DISTRICT	
Revenues	\$70,000.00
Unexpended Balance	\$222,500.00
Waste Dist Total	\$292,500.00
FIRE DISTRICT	
Revenues	\$150.00
Total Fire District	\$150.00
TOTAL SPECIAL DISTRICTS REVENUES	\$3,303,087.00
SUMMARY	
TOTAL VILLAGE EXPENDITURES	\$5,869,676.38
TOTAL SPECIAL DISTRICTS REVENUES	\$3,303,087.00
AMOUNT TO BE RAISED BY TAX	\$2,566,589.38

VILLAGE OF FISHERS ISLAND: PROJECTED EXPENDITURES			
GENERAL FUND			
A1010.0	Board of Trustees		Mayor and Trustees constitute the Board of Trustees
A1010.110	Personal Services - Mayor	\$0	Mayor receives no salary
A1010.120	Personal Services - Board of Trustees	\$0	Trustees receive no salary
A1010.4	Other	\$10,000	Costs associated with meetings, travel, support, etc.
A1010.468	Municipal Associations	\$1,500	
	Subtotal A1010	\$11,500	
A1230.0	Village Administrator		
A1230.110	Personal Services - Village Administrator	\$95,000	Full time paid position, appointed by trustees
A1230.120	Administrative Assistant to Village Administrator	\$31,500	7/10 full time position
A1239.130	Population Czar / Development Director	\$65,000	Full time paid position
A1230.199	Vacation	\$4,865	2 weeks for each person
A1230.411	Office Supplies	\$1,000	
A1230.436	Professional Business Expenses	\$2,000	
A1230.454	Travel / Conferences / Meetings	\$10,000	
	Subtotal A1230	\$209,365	
A1325.0	Treasurer		
A13250.110	Village Treasurer	\$35,000	half time position, incorporating duties of assessor
A13250.411	Office Supplies	\$500	
A13250.436	Professional Business Expenses	\$1,000	
A1325.442	Banking Services	\$200	
A1325.443	Credit Card Fees	\$500	
A13250.454	Travel / Conferences / Meetings	\$1,000	
A13250.477	Audit Fee	\$10,000	
	Subtotal A1325	\$48,200	
A1419.0	Village Clerk		
A1491.110	Village Clerk	\$50,000	full time position
A1491.120	Clerk (combined with Admin Asst to Village Administrator)	\$13,500	3/10 time position combined with Administrator Asst
A1410.199	Meeting Minutes	\$3,000	
A1410.462	Legal Advertising	\$1,000	
A1491.484	Records Management	\$500	
A1410.485	Vital Statistics	\$500	
A1410.486	Village Elections	\$3,500	
	Subtotal A1419	\$72,000	
A1420.0	Village Attorney		
A1420.1	Personal Services - Attorney	\$0	
A1420.4	Other - consulting fees	\$35,000	
	Subtotal A1420	\$35,000	
A1440.0	Engineering / Department of Public Works		
A1440.110	Village Engineer	\$43,000	1/2 time position - combine with Building Inspector
A1440.454	Travel / Conferences / Meetings	\$2,000	
	A1440 Subtotal	\$45,000	
A1620.0	Village Hall		
A1620.2	Equipment		
A1620.210	Office Equipment	\$3,000	
A1620.220	Furniture and Fixtures	\$1,000	
A1620.411	Maint Supplies	\$1,000	
A1620.431	Utilities / Communications	\$20,000	
A1620.441	Maintenance and Repair	\$3,000	
A1620.425	Contractual (cleaning)	\$1,200	
	A1620 Subtotal	\$29,200	
A1680.0	Information Services		
A1680.1	Personal Services - Information Services Manager	\$0	
A1680.2	Equipment	\$2,500	(includes servers, printers, etc.)
A1680.4	Other - Consulting Fees	\$3,000	
A1680.408	Toner	\$500	
A1680.409	Software	\$500	
A1680.410	A/V Supplies	\$150	
A1680.411	Computer Supplies	\$500	
A1680.498	Education and Training	\$500	
	A1680 Subtotal	\$7,650	

A1900	Special Items		
A1910.422	Insurance	\$20,000	
	A1900 Subtotal	\$20,000	
A3120	Police Department		
A3120.110	Personal Services - Constable	\$50,000	(2) constables half time
A3120.120	Bay Constable	\$25,000	(1) at half time
A3120.2	Equipment	\$2,500	
	A3120 Subtotal	\$77,500	
A3410	Fire Protection		
	Fire District Budget (includes EMS/Sea Stretcher)	\$395,200	2013 Town of Southold Adopted Budget
	Subtotal Fire Protection	\$395,200	
A3510	Animal Control		
A3510.4	Other - Animal Control Contracts	\$2,500	
	A3510 Subtotal	\$2,500	
A3620	Safety Inspection		
A3620.110	Building Inspector	\$43,000	1/2 time position, combined with town engineer
A5110.0	Street Maintenance	\$40,000	
A5242.0	Snow Removal	\$25,000	
A5680	Ferry Service		
	Fishers Island Ferry District Budget	\$3,740,837	2013 Town of Southold Adopted Budget
A7110	Parks Department		
	Parks and Beaches	\$5,000	
A7410	Library	\$50,000.00	
A8020.0	Planning and Zoning Board		
A8020.4	Other - Town Planning Consultant/Zoning Enforcement	\$15,000	
A8090	Environmental Control	\$15,000	
A8110	Sewer Administration		
	Fishers Island Sewer District Budget	\$34,600	2013 Town of Southold Adopted Budget
A8160.0	Refuse Collection & Disposal		
	Fishers Island Waste Management District	\$829,450	
A9000.0	Employee Benefits		
A9030.8	Fringe rate of 37.4%	\$168,674	includes Social Security, Medicare, Health Insurance, retirement
	A9000 Subtotal	\$168,674	
TOTAL VILLAGE EXPENDITURES		\$5,869,676	
TOTAL of TAX DISTRICT EXPENDITURES		\$4,965,487	
TOTAL added cost of Village Government		\$904,189	

What effect would the projected annual budget have on Island property tax rates?

Having arrived at a more-or-less “plausible” projection for how much a Fishers Island Village government might cost, we wanted to find out what effect this budget would have on the property tax rates on the Island. In order to calculate this, we needed first to determine what the total assessed value of all Island real estate is.

Using an “average” 2012 Town and County Tax bill available (we used property 1.-1-1) we backed out the total assessed value of Island real estate. The tax bill provides the following information:

- The tax rate (in dollars per \$1000 in assessed value), for each category of tax, including Suffolk County, Southold Town, the 5 Fishers Island Districts, and a few miscellaneous New York State taxes
- Total Tax levy per category

To determine the total assessed value of all property on Fishers Island, we used the Fishers Island School district figures to back out the number. The School District total tax levy was \$3,036,258 and its tax rate was 361.269. Dividing the total tax levy by the rate, we get 8,404.42; Then multiplied by \$1000, for a total Island assessed value of \$8,374,934.

Total Island Assessed Value 2012 = \$8,374,934

We then wanted to determine the total market value of all Island real estate. Assessed value in Southold is calculated based on 1.15% of total market value. To determine total market value, we took the total assessed value of \$8,374,934 and divided it by 1.15% to get \$728,255,130.43.

Total Island Market Value 2012 = \$728,255,130

A typical tax bill on Fishers Island consists of taxes from Suffolk County, New York State,

Southold, and Fishers Islands special districts (School, Fire Department, Ferry, and Garbage). The combined tax rate for all these categories in 2012 is \$861.97 per \$1,000 of assessed value. Of this total, Southold Town tax represents 30%, Fishers Island’s Special Tax Districts represent 66%, and the 4% balance is Suffolk County and the State of New York.

For comparative purposes, we calculated the equivalent Effective Tax Rate (ETR) paid by Fishers Island. ETR is calculated as the percentage of total market value paid annually in property tax⁵. In 2012, that ETR was 0.99%. Comparisons to other ETRs in rural towns throughout the country (as published in *50-State Property Tax Comparison Study* prepared by the Lincoln Institute of Land Policy and Minnesota Taxpayers Association in 2011) indicate that Fishers Island property owners enjoy an extremely low rate of property taxation. Average ETR on homestead properties with a value of \$300,000 in New England rural towns is 1.927%, while in Mid-Atlantic rural towns it is 1.825%. No statistics are given for value higher than \$300,000.

For the purpose of illustration, we also calculated the equivalent Connecticut “mill rate” (calculated as tax per thousand dollars of assessed value, where assessed value is 70% of market value). In 2012, Fishers Island paid the equivalent of a Connecticut mill rate is 6.94. By way of comparison, New Haven’s mill rate is 38.8 and New London’s is 26.

We also calculated an example tax bill based on an \$18,000 assessment, or a \$1.56 million house. Taxes in 2012 for this property would total \$15,515.

We then recalculated the tax rates based on having the village government described above in place. All special taxing districts, with the

⁵ In 2012, the total market value of Fisher Island real estate was \$728,255,130, and the Total Taxes paid by the Island were \$7,218,975.

Total Island Valuation 2012 \$8,374,934.00
Uniform % of Full Market Value 1.15%
Total Island Market Value \$728,255,130.43

Total Southold Valuation 2012 \$107,090,869

CURRENT TAXES PAID BY FISHERS ISLANDERS

Tax Description	Rate	Total Taxes Paid By Island	Total Tax Levy	FI % of Total Tax Levy	% of Total Tax Bill	"Typical House" Assessment	"Typical House" Tax Amount
Suffolk County	18.615	\$155,899	\$54,287,505	0.29%	2.16%	\$18,000	\$335.07
NYS Real Prop TaxLaw	10.549	\$88,347	\$1,139,953	7.75%	1.22%	\$18,000	\$189.88
MTA Payroll Tax	0.62	\$5,192	\$67,008	7.75%	0.07%	\$18,000	\$11.16
Out of Cty SCCC	0.731	\$6,122	\$78,917	7.76%	0.08%	\$18,000	\$13.16
Southold Town Tax	261.584	\$2,190,749	\$28,013,258	7.82%	30.35%	\$18,000	\$4,708.51
Fishers Island School	361.296	\$3,025,830	\$3,036,258	99.66%	41.91%	\$18,000	\$6,503.33
Fishers Island Library	5.95	\$49,831	\$50,000	99.66%	0.69%	\$18,000	\$107.10
Fishers Island Fire Dept	47.171	\$395,054	\$395,050	100.00%	5.47%	\$18,000	\$849.08
Fishers Island Ferry	91.344	\$765,000	\$765,000	100.00%	10.60%	\$18,000	\$1,644.19
Fishers Island Garbage	64.114	\$536,951	\$536,950	100.00%	7.44%	\$18,000	\$1,154.05
Combined Rate	861.974	\$7,218,975			100.00%	TOTAL TAX	\$15,515.53

Equivalent CT Mill Rate 6.94

Effective Tax Rate* 0.99%

\$208.579

PROJECTED TAXES PAID BY FISHERS ISLANDERS WITH VILLAGE GOVERNMENT (assuming no concessions from Southold)

	Rate	Taxes Paid By Island	Total Tax Levy	FI % of Total Tax Levy	% of Total Tax Bill	"Typical House" Assessment	"Typical House" Tax Amount
Suffolk County	18.615	\$155,899	\$54,287,505	0.29%	1.95%	\$18,000	\$335.07
NYS Real Prop TaxLaw	10.549	\$88,347	\$1,139,953	7.75%	1.10%	\$18,000	\$189.88
MTA Payroll Tax	0.62	\$5,192	\$67,008	7.75%	0.06%	\$18,000	\$11.16
Out of Cty SCCC	0.731	\$6,122	\$78,917	7.76%	0.08%	\$18,000	\$13.16
Southold Town Tax	261.584	\$2,190,749	\$28,013,258	7.82%	27.37%	\$18,000	\$4,708.51
Fishers Island School	361.296	\$3,025,830	\$3,036,258	99.66%	37.80%	\$18,000	\$6,503.33
Village of Fishers Island	302.476	\$2,533,215	\$2,533,215	100.00%	31.64%	\$18,000	\$5,444.56
Combined Rate	955.871	\$8,005,355			100.00%	TOTAL TAX	\$17,205.67

Equivalent CT Mill Rate 7.69

Effective Tax Rate* 1.10%

\$93.90

PROJECTED TAXES PAID BY FISHERS ISLANDERS WITH VILLAGE GOVERNMENT (assuming 20% reduction in Town of Southold Tax)

	Rate	Taxes Paid By Island	Total Tax Levy	FI % of Total Tax Levy	% of Total Tax Bill	"Typical House" Assessment	"Typical House" Tax Amount
Suffolk County	18.615	\$155,899	\$54,287,505	0.29%	2.06%	\$18,000	\$335.07
NYS Real Prop TaxLaw	10.549	\$88,347	\$1,139,953	7.75%	1.17%	\$18,000	\$189.88
MTA Payroll Tax	0.62	\$5,192	\$67,008	7.75%	0.07%	\$18,000	\$11.16
Out of Cty SCCC	0.731	\$6,122	\$78,917	7.76%	0.08%	\$18,000	\$13.16
Southold Town Tax	209.2672	\$1,752,599	\$28,013,258	6.26%	23.16%	\$18,000	\$3,766.81
Fishers Island School	361.296	\$3,025,830	\$3,036,258	99.66%	39.99%	\$18,000	\$6,503.33
Village of Fishers Island	302.476	\$2,533,215	\$2,533,215	100.00%	33.48%	\$18,000	\$5,444.56
Combined Rate	903.554	\$7,567,205			100.00%	TOTAL TAX	\$16,263.97

Equivalent CT Mill Rate 7.27

Effective Tax Rate* 1.04%

PROJECTED TAXES PAID BY FISHERS ISLANDERS WITH VILLAGE GOVERNMENT (assuming 30% reduction in Town of Southold Tax)

	Rate	Taxes Paid By Island	Total Tax Levy	FI % of Total Tax Levy	% of Total Tax Bill	"Typical House" Assessment	"Typical House" Tax Amount
Suffolk County	18.615	\$155,899	\$54,287,505	0.29%	2.15%	\$18,000	\$335.07
NYS Real Prop TaxLaw	10.549	\$88,347	\$1,139,953	7.75%	1.22%	\$18,000	\$189.88
MTA Payroll Tax	0.62	\$5,192	\$67,008	7.75%	0.07%	\$18,000	\$11.16
Out of Cty SCCC	0.731	\$6,122	\$78,917	7.76%	0.08%	\$18,000	\$13.16
Southold Town Tax	170.0296	\$1,423,987	\$28,013,258	5.08%	19.67%	\$18,000	\$3,060.53
Fishers Island School	361.296	\$3,025,830	\$3,036,258	99.66%	41.80%	\$18,000	\$6,503.33
Village of Fishers Island	302.476	\$2,533,215	\$2,533,215	100.00%	35.00%	\$18,000	\$5,444.56
Combined Rate	864.316	\$7,238,593			100.00%	TOTAL TAX	\$15,557.70

Equivalent CT Mill Rate 6.96

Effective Tax Rate* 0.99%

* Effective Tax Rate is the percentage of the total market value represented by the tax amount
Total Valuation determined dividing total tax levy for FI Ferry District by the tax rate and multiplying by 1000
Data based on Tax Bill information

exception of the School District, were collapsed into a single Village of Fishers Island Tax, with a rate of \$302.476 per \$1000 of assessed value. Of this amount, the four special districts comprise \$208.579 and the village government \$93.897. This addition modestly increased the total tax rate to \$955.871 per \$1000 of assessed value, increasing the ETR to 1.10%, and increasing the tax on our case study house to \$17,205, an increase of 10.8% or \$1690.14.

While incorporated villages typically continue to pay taxes to the town they are part of, there are often reductions in that amount which must be subject of negotiations between the village government and town government. To get an idea for what a reduction in Southold Tax might do to overall tax rates, we recalculated the rate based on a 20% reduction of the Southold tax, and a 30% reduction. A 20% reduction produces a combined tax rate of \$903.554 / \$1000 assessed value, or an ETR of 1.04%. A 30% reduction produces a combined tax rate of \$877.396 / \$1000 assessed value, or an ETR of 1.01%.

Finally we calculated the “break even” point – what percent reduction in Southold taxes would be the equivalent of the entire cost of the village government. This reduction is 35%, to a rate of \$170.03 / \$1000 assessed value.

It is important to note at this point that the tax levy for the School District exceeds the tax levy of the entire village government, incorporating all four other tax districts, and also exceeds the Southold Town tax. Changes in the school budget therefore have potentially more impact on overall tax rates on the Island than either of the other categories.

What kind of concessions on Southold Town Tax is a Village of Fishers Island likely to realize?

As discussed elsewhere in this report, a reduction in the Southold Town tax rate after Village Incorporation would be subject to negotiation between the new village government and the Town Board, a negotiation complicated by Fishers Island's need for Southold to at least tacitly support the Island's bid for incorporated status.

It has been suggested on the Island that the difference between what is paid to Southold in the form of property taxes, and what services, amenities and benefits are actually, directly available to Fishers Islanders represents a great inequity that might be remedied through Incorporation. The process of incorporation may open a dialog on this issue with Southold government but it is not at all clear that Incorporation will have the effect of reducing the tax burden of Islanders or “recouping” the perceived loss of tax revenue to Southold. Regardless of this point, it did seem valuable to the authors to try to calculate what this inequity represents.

At least two well-documented attempts have been made to calculate the inequity between taxes paid out by the Island to the Town of Southold, and services received in return. As far as we can tell, these analyses were not prepared with the specific goal of looking at the costs and benefits of incorporation, but instead look only at costs and benefits received by the Island in its current state. In 1992, at the request of the Fishers Island Conservancy, Project Management Associates (PMA) of Hartford, Connecticut prepared *Cost/Benefit Review, Town Taxes Paid by Property Owners of Fishers Island, NY*. The report begins by calculating the total taxes paid by the Island to the Town of Southold and what percentage of overall Southold revenues Fishers Island's contribution represents. Then, through line-by-line examination of the Town of Southold Budget, they

sorted expenditures into three categories:⁶

1. Whether the benefits realized by the activities of the category can be considered to be shared on a proportional basis between all contribution taxpayers.
2. Whether benefits realized by the activities of the category may be considered as shared on a basis unequal to the proportional contribution of Taxpayers on, and off-island.
3. Whether the benefits realized by the activities of the category may be considered as unavailable to the property owners and residents of the Island.

It was determined at the time that the total assessed valuation of the Island was \$7,225,794, representing 8.06% of the total tax levy in the General fund, with slight variations in each of three other funds: General Fund—Outside Village, Highway—Townwide, and Highway—Outside Village. All special taxing districts throughout the town were excluded since their rates have no effect.

PMA calculated that the Island's contribution to the Town exceeds its benefits by \$329,000, representing 37% of the total tax contributions from Fishers.

In 2008, Island resident Peter Brinckerhoff updated PMI's projections, following their methodology as closely as possible, but with some modifications which produced a more liberal projection of inequity than the previous version. In this update, total assessed valuation of Island properties is calculated at \$8,270,778, representing 7.73% of Southold's total valuation. His calculation is that Fishers Island contributes \$1,282,745 more to Southold Tax than it receives in benefits. Total of taxes paid to Southold by the Island are not given in the report, so we cannot calculate what percentage of the total that represents.

We reviewed, in detail, the 2012 Southold Town Budget to project an update of the inequity figure. We looked in detail at three categories of the budget: Fund A, the General Fund, B, General-Outside Village Fund, and DB, the Highway Fund. As in the previous exercises, we assumed the special districts had no impact on Fishers Island, as they were either Fishers Island districts or limited to other areas of Southold.

The total tax levy in A, B, and DB is \$28,013,258, of which Fishers Island contributes 7.82%, or \$2,190,749. If we assume the same categories from Fund A provide no benefit to Fishers Island, the tax contribution without benefit to fishers for A is \$1,350,178. We believe Fund B includes budget items for which the Village of Greenport does not owe taxes. It is our assumption that if Fishers Island was a Village, this amount would also not apply to Fishers. FI contributes \$67,622

6 PMA, Cost Benefit Review, page 2.

FISHERS ISLAND CONTRIBUTION TO COMPONENTS OF SOUTHOOLD TOWN TAXES						
		Total Assessed Valuation	FI Assessed Valuation	FI % of Valuation	Adopted 2013 Budget	FI Contribution to Budget
A	General	\$107,090,869	\$8,374,934	7.82%	\$22,215,752	\$1,737,361
B	General - Outside Village	\$107,090,869	\$8,374,934	7.82%	\$864,689	\$67,622
DB	Highway Fund	\$107,090,869	\$8,374,934	7.82%	\$4,932,817	\$385,766
CD	Community Development	\$107,090,869	\$8,374,934	7.82%	\$0	\$0
CS	Risk Retention Fund	\$107,090,869	\$8,374,934	7.82%	\$0	\$0
H3	Community Preservation Fund	\$107,090,869	\$8,374,934	7.82%	\$0	\$0
MS	Employee Health Plan	\$107,090,869	\$8,374,934	7.82%	\$0	\$0
	TOTALS				\$28,013,258	\$2,190,749

ACCOUNTS FROM WHICH FISHERS RECEIVES NO USE OR BENEFIT					
(following 1992 PMA analysis and 2008 Brinckerhoff Analysis)					
Fringe Rate	37.40%				
		Amended 2012 Budget	Personnel Fringe Benefits*	Direct Category Revenue	Net Cost
A. General Fund					
A1490	Public Works Administration	\$64,516.00	\$23,941.98		\$88,457.98
A1620	Buildings and Grounds	\$1,613,710.00	\$322,425.40		\$1,936,135.40
A1640	Central Garage	\$44,596.00	\$0.00		\$44,596.00
A1670	Central Copying and Mailing	\$103,040.00	\$0.00		\$103,040.00
A1680	Central Data Processing	\$539,545.00	\$72,394.43		\$611,939.43
A1989	Land Management Coordination	\$148,336.00	\$39,008.20		\$187,344.20
A1920	Special Items	\$351,463.00	\$0.00		\$351,463.00
A3120	Police	\$7,931,220.00	\$2,711,144.70		\$10,642,364.70
A3157	Juvenile Assistance	\$5,870.00	\$0.00		\$5,870.00
A3310	Traffic Control	\$16,350.00	\$0.00		\$16,350.00
A3410	Fire Fighting	\$150.00	\$0.00		\$150.00
A3510	Control of Dogs	\$208,588.00	\$0.00		\$208,588.00
A3610	Examining Boards	\$9,360.00	\$0.00		\$9,360.00
A3640	Emergency Preparedness	\$1,900.00	\$0.00		\$1,900.00
A4010	Public Health	\$1,800.00	\$0.00		\$1,800.00
A4210	Family Counseling	\$33,000.00	\$0.00		\$33,000.00
A5010	Superintendent of Highways	\$314,300.00	\$117,548.20		\$431,848.20
A5182	Street Lighting	\$205,440.00	\$23,861.20		\$229,301.20
A5650	Off Street Parking	\$500.00	\$0.00		\$500.00
A6410	Publicity	\$30,000.00			\$30,000.00
A6772	Programs for the Aging	\$1,274,633.00	\$371,606.40		\$1,646,239.40
A7020	Recreation	\$179,310.00	\$30,294.00		\$209,604.00
A7180	Beaches	\$102,050.00	\$35,586.10		\$137,636.10
A7310	Youth Programs	\$5,917.00	\$0.00		\$5,917.00
A7510	Historian	\$19,800.00	\$7,031.20		\$26,831.20
A7520	Landmarks Preservation Commission	\$7,250.00	\$2,057.00		\$9,307.00
A7550	Celebrations	\$1,000.00	\$0.00		\$1,000.00
A8560	Trees Committee	\$7,925.00	\$748.00		\$8,673.00
A8660	Community Development	\$181,928.00	\$67,106.07		\$249,034.07
A8170	Land Preservation	\$6,460.00	\$108.46		\$6,568.46
A8720	Fish and Game	\$10,000.00	\$0.00		\$10,000.00
A8801	Cemeteries	\$6.00	\$0.00		\$6.00
A8830	Shellfish	\$20,000.00	\$0.00		\$20,000.00
	TOTALS:	\$13,439,963.00	\$3,824,861.35	\$0.00	\$17,264,824.35
FI SHARE OF BUDGET CATEGORY		7.82%			
TAX CONTRIBUTION WITHOUT BENEFIT		\$1,350,178.27			
*Fringe Calculated at 37.4% of Personnel Cost					

Tax Rates that Villagers Pay to Towns					
Village Tax Rates					
data from http://seethroughny.net/benchmarking-ny/#!					
Village	Town	Town Rate Outside Village	Town Rate in Village	% reduction of town tax in village	Village Tax Rate
Alexandria Bay	Alexandria	\$0.49	\$0.49	0.00%	\$7.37
Shoreham	Brookhaven	\$2.07	\$0.90	56.52%	\$4.66
Belletere	Brookhaven	\$2.07	\$0.90	56.52%	\$2.48
Old Field	Brookhaven	\$2.07	\$0.90	56.52%	\$1.89
Sag Harbor	East Hampton	\$1.98	\$0.77	61.11%	\$2.86
Goshen	Goshen	\$4.10	\$1.53	62.68%	\$7.54
Chester	Goshen	\$4.10	\$2.89	29.51%	\$7.28
Ashoroken	Huntington	\$1.95	\$0.88	54.87%	\$4.63
Huntington Bay	Huntington	\$1.95	\$0.88	54.87%	\$2.92
Brightwaters	Islip	\$0.70	\$0.69	1.43%	\$2.52
Islandia	Islip	\$0.70	\$0.69	1.43%	\$1.13
Ocean Beach	Islip	\$0.70	\$0.69	1.43%	\$7.01
Deering Harbor	Shelter Island	\$2.23	\$2.09	6.28%	\$2.61
North Haven	Southampton	\$1.39	\$0.39	71.94%	\$0.50
Quogue	Southampton	\$1.39	\$0.39	71.94%	\$1.88
Greenport	Southold	\$2.87	\$2.29	20.21%	\$2.03
Carthage	Wilna	\$2.98	\$2.98	0.00%	\$7.71
Defereit	Wilna	\$2.98	\$2.98	0.00%	\$9.00
Herrings	Wilna	\$2.98	\$2.98	0.00%	\$3.54
Note: Rates are in tax dollars per \$1000 of market value					

to this amount. Calculations of the impact of the DB Highway Fund are not possible without more detailed information. Therefore, an estimate of the inequity between what Fishers pays in taxes to Southold and what it receives back in benefits for 2012 is \$1,417,800, representing 65% of Fishers payments to Southold.

It is critical to note that we have not performed the kind of detailed analysis of each category done in the PMA report, and that this figure should be understood as a loose estimate. A more detailed figure would require line-by-line review of the budget with the Town Supervisor.

Reduction in Southold Tax – Comparative Method

We examined other Villages to see how much of a reduction they saw in their town tax as compared to those living outside of the Village. In the 19 Villages we sampled, reduction in town tax rates varied between 0% and 71.94%.

Other Benefits of Village Status

While many of the benefits of becoming an Incorporated Village have by now been made clear in this report, another important reason to incorporate is to give the Island a voice and status to negotiate with outside entities. Things which must now be negotiated through the Town of Southold could now be managed from the Island - including anything from applying for grants, public or private, to negotiating on-island training of firefighters and EMTs.

Although not yet confirmed, another benefit of village status appears to be local enforcement of DEC regulations.

Recruitment, Marketing and Retention

If Fishers Island is to stabilize and grow its year round population, it must find a way of actively attracting new residents and retaining existing ones. Upon successful incorporation as a village, one of the important roles a new government for Fishers Island could take on would be to manage this by creating an Office of Island Development, whose responsibility it would be to work specifically on this important issue. This office might be staffed by a "Development Director" or "Population Czar."

In our interviews, we heard many stories of people who thought about moving to the Island but decided not to do so because it was too complicated, or they couldn't get appropriate information, or the information they were able to get was conflicting. We also heard stories of people who were thinking about leaving the Island because they had nowhere to turn to for appropriate support in issues of housing or employment.

To some extent, Island institutions are already very good at recruiting new year round population, if in on a limited and case-by-case basis. These new residents are often enticed to the Island with a package of benefits that ease the transition to Island life - like providing access to housing and discounted or free ferry tickets.

A big part of the Development Director's job would be to recruit new people to the Island. Any potential new resident could be directed to the Development Director, who could assist potential residents in getting a better sense for Island life, and when appropriate, provide support for those who choose to relocate. A set of enticements could be developed for new residents to ease their transition. Island institutions could also call on the Development Director to assist them in their search for staff.

The Director would need to be familiar with everything happening on the Island, and speak intelligently about cost of living, housing, transportation, education, and recreation. The Director would, in many ways, be a clearinghouse for Island information.

But the role of Development Director would be more than just recruitment - he would also provide ongoing support for all year-round residents and businesses, helping residents who want to stay on Fishers Island but who are having difficulty doing so.



Next Steps



Crafton

Stomington

Mastie Riv^r

Mount Pleasant Inlet

Watch Point

40
M

The Cerberus Frigate struck
this Rock in 1777

XI

2 1/2 Knots

Next Steps

**Important things
about the next steps
to take will go here.**

Phasing

The first set of goals will need to be carried out by the ICB in its current form. Later goals will need to be achieved by the incorporated village government

The ICB should consider hiring a paid part-time project manager to organize and spearhead the effort around incorporation and

- a. Distribute the report to all interested parties
- b. ICB to meet in person and develop a community outreach campaign -- assign ICB members to host specific meetings with all Island civic organizations, tax jurisdictions, clubs, churches, businesses etc. Set specific deadlines. Capture and consider all input.
- c. Task an ICB subcommittee to formulate specific next steps around Governance -- Develop a detail village budget, identify positions to be filled, identify our 500 "residents", develop an approach to Southold
- d. ICB to prioritize various recommendations which can be implemented in parallel to c. above (which is going to take time). Recommendations around infrastructure come to mind. Assign responsible parties and set timelines.

Monitoring Outcomes

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COLOPHON

This report was written and designed by the Yale Urban Design Workshop, a community design based at the Yale University School of Architecture in New Haven, Connecticut.

The following individuals participated in the project and development of the report:

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The font used in the book is Glypha LT.

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