WARREN ECONOMIC PROFILE

Prepared by the Warren Planning Department
March 2014
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<td>Community Overview</td>
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<td>Zoning for Economic Development</td>
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<td>Economic Data</td>
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<tr>
<td>Utility and Communications Infrastructure</td>
</tr>
<tr>
<td>Economic Assessment</td>
</tr>
</tbody>
</table>
COMMUNITY OVERVIEW
Regional Context

- Warren is a scenic community of 5,000 people midway between Worcester and Springfield, Mass.
- Turnpike exits 9 in Sturbridge and 8 in Palmer are only 15 minutes from Warren with direct access via Routes 67 and 19.
**Brief History**

- Warren is an historic village in Worcester County. It was part of the original Quaboag Plantation formed in 1660 and became a separate town in 1742.
- The Town is named for Joseph Warren, a Revolutionary War patriot who commanded forces at Bunker Hill.
- The availability of water power from the Quaboag River spurred industrial development in Warren Center and West Warren.
- Hardwick Knitted Fabrics, the William Wright Co., and Warren Pumps were mainstays of the local economy and helped to create a skilled workforce.
- In outlying areas, agriculture flourished. Many farms remain and continue to produce dairy products, vegetables, and fruits from productive orchards.
TOPOGRAPHY

- The Quaboag River is the dominant feature of the landscape and controlled the settlement pattern. The villages of Warren and West Warren located near-by because of the gentle grades and developable soils.
- The Town’s motto is “Warren Among the Hills”. Prominent hills include Coy Hill, Devil’s Peak, Colonel’s Mountain, and Mark’s Mountain.
VILLAGES OF WARREN

- Warren’s compact villages developed around 19th century industries and today contain a mix of housing and services to enhance life in a small town.
- The Warren Center Transportation Improvement Project in FY ’15 will help revitalize the village.
WARREN MASTER PLAN: SUPPORT FOR NEW COMMERCIAL GROWTH

- A citizen survey for the Master Plan indicated strong support for new commercial development and less support for new housing.
- What is your preference in terms of rate of development over the next 10 years?

<table>
<thead>
<tr>
<th></th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Fast</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>Somewhat Fast</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>Somewhat Slow</td>
<td>44%</td>
<td>28%</td>
</tr>
<tr>
<td>Very Slow</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>None</td>
<td>11%</td>
<td>5%</td>
</tr>
</tbody>
</table>
ZONING FOR ECONOMIC GROWTH
CURRENT ZONING SCHEME

Warren has three conventional zoning districts:

• Rural District
  - The Rural District provides for low density residential development.
  - It also allows offices, recreational facilities, warehouses, and solar farms.

• Residential District
  - The Residential District supports medium density single and two family residences surrounding the Village district.
  - It also allows offices, hotels, recreational facilities, and restaurants.

• Village District
  - The Village District encompasses Warren Center and West Warren.
  - The District allows a mix of land uses, including high density residential, retail, office, industry, banks, etc., to meet the Town’s business needs.

Warren has two overlay districts to promote special types of development:

• Major Development Overlay District
• Mill Development Overlay District
<table>
<thead>
<tr>
<th>District</th>
<th>Acres</th>
<th>% of Town</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>15,344</td>
<td>86.8%</td>
</tr>
<tr>
<td>Residential</td>
<td>997</td>
<td>5.6%</td>
</tr>
<tr>
<td>Village</td>
<td>1,338</td>
<td>7.6%</td>
</tr>
</tbody>
</table>

**Warren Zoning Districts**

**Legend**
- Residential
- Rural
- Village

Information displayed on this map is for planning purposes only. The information is not adequate for legal boundary definition, regulatory interpretation, or parcel-level analysis.

Map prepared by: Warren Planning Department
Source Data: MassGIS & Ecology
Warren Assessors - parcels and zoning
January 2013
Major Development Overlay District

- Purposes
  - Foster economic growth
  - Provide employment opportunities for residents
  - Increase the local tax base
  - Preserve the natural environment, and
  - Provide for mitigation of any negative impacts caused by new development

- The district provides flexibility for large scale development.
- One land owner has significant acreage.
- Few residential properties lie in the district, which reduces potential land use conflicts.
- It is one of the largest contiguous parcels of undeveloped land in Central Massachusetts.
ZONING DISTRICTS
WARREN, MASSACHUSETTS
MAJOR DEVELOPMENT OVERLAY DISTRICT

<table>
<thead>
<tr>
<th>Owner</th>
<th>Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rolling Hills Estates</td>
<td>1,047</td>
</tr>
<tr>
<td>Other</td>
<td>14</td>
</tr>
<tr>
<td>Total</td>
<td>1,061</td>
</tr>
</tbody>
</table>
MDOD PERMITTED USES

- Business and professional offices
- Research and Development
- Light manufacturing, processing and assembling
- Retail stores and commercial services, including shopping centers, malls, warehouse-type outlets, banks, restaurants and fast food restaurants
- Hotels, inns, conference centers and function facilities
- Commercial indoor and outdoor recreation facilities
- Automotive service stations
- Renewable/Alternative Energy Research and Development Facilities
- Heliport or helipad as an accessory use
- For-profit educational institutions
- Museums and non-profit institutions
- Nursing homes, rehabilitation facilities, assisted living facilities, and hospitals
- Rail freight terminals
MDOD Development Sites
FORMER WRIGHT MILL

- Approximately 600,000 square feet of space
- Contains 65 acres of land
- Re-zoned in 2012 as a Mill Conversion Overlay District (MCOD)
- Allows a mix of residential, commercial, industrial, and institutional uses
- Potential for small scale hydro power plant
- Has surplus water and sewer capacity and access to all utilities
Mill Conversion Overlay District - Wright Mill, West Warren, MA

Lot 21-0-39
65.6 acres

Information depicted on this map is for planning purposes only. This information is not adequate for legal boundary definition, regulatory interpretation, or parcel-level analysis. Use caution in interpreting positional accuracy.
HARDWICK KNITTED FABRICS

- In the same complex as the Wright Mill.
- Contains 240,000 square feet of industrial space.
- Has surplus water and sewer capacity and access to all utilities.
ECONOMIC DATA
### Tax Base Analysis

<table>
<thead>
<tr>
<th>FY 2014 Tax Levy by Class</th>
<th>Levy</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Property Class</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residential</td>
<td>$5,246,657</td>
<td>87.8%</td>
</tr>
<tr>
<td>Commercial</td>
<td>$176,251</td>
<td>3.0%</td>
</tr>
<tr>
<td>Industrial</td>
<td>$150,034</td>
<td>2.5%</td>
</tr>
<tr>
<td>Personal Property</td>
<td>$400,935</td>
<td>6.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$5,973,877</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

- Warren is dependent upon residential property for its tax base – 87.8%.
- Commercial and industrial property comprises just 5.5% of the tax levy.
- Warren has had little new economic growth to support the increasing cost of providing services.
- The Town has the capacity and desire to attract new economic development.
Warren’s rate is consistently higher than the state average.
In December 2012, the Town’s rate was 9.6% compared to 8.5% for the state.
Warren needs good paying jobs!

1. Five Year Labor Force Averages Source: U.S, Census Bureau, American Community Survey 5 Year Estimates
AVERAGE SINGLE FAMILY TAX BILLS

<table>
<thead>
<tr>
<th>TOWN</th>
<th>TAX BILL</th>
</tr>
</thead>
<tbody>
<tr>
<td>WARREN</td>
<td>2,968</td>
</tr>
<tr>
<td>BROOKFIELD</td>
<td>3,533</td>
</tr>
<tr>
<td>WEST BROOKFIELD</td>
<td>2,612</td>
</tr>
<tr>
<td>WARE</td>
<td>3,003</td>
</tr>
<tr>
<td>STURBRIDGE</td>
<td>4,553</td>
</tr>
<tr>
<td>PALMER</td>
<td>2,893</td>
</tr>
<tr>
<td>BRIMFIELD</td>
<td>3,364</td>
</tr>
<tr>
<td>MASSACHUSETTS</td>
<td>4,711</td>
</tr>
</tbody>
</table>

Warren has a low single family tax bill compared to its neighbor towns. The average single family tax bill is 37% lower than the state average.
REGIONAL EMPLOYMENT BY SECTOR

Region: Southern Worcester Workforce Investment Area., Year: 2011. The chart compares the Region with the state as a whole. Source: North American Industry Classification System (NAICS) Codes
Employment Comparison: SWWIA\(^1\) v. State 2011

- Areas where the Region has a greater percentage of employees than the state:
  - Health Care and Social Assistance, 2.8%
  - Manufacturing, 1.8%
  - Educational Services, 1.7%
  - Retail Trade, 0.8%
  - Transportation and Warehousing, 0.7%

- Areas where the Region has a lesser percentage of employees than the state:
  - Professional and Technical Services, -3.4%
  - Information, -1.2%
  - Accommodation and Food Services, -0.9%

1. SWWIA: Southern Worcester Workforce Investment Area. Warren is in this labor market area.
## Labor Force

<table>
<thead>
<tr>
<th>5 Year Labor Force Averages (Year Ending 2012)</th>
<th>Warren</th>
<th>Massachusetts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Labor Force</td>
<td>2,463</td>
<td>3,608,505</td>
</tr>
<tr>
<td>Employed</td>
<td>2,207</td>
<td>3,302,990</td>
</tr>
<tr>
<td>Unemployed</td>
<td>256</td>
<td>305,515</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>9.6</td>
<td>8.5</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. American Community Survey 5 year estimates.
# Occupations

## Resident Occupations in 2012

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Warren</th>
<th>Percent</th>
<th>Massachusetts</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed civilian pop. 16 years and over</td>
<td>2,463</td>
<td>100.0%</td>
<td>3,608,505</td>
<td>100.0%</td>
</tr>
<tr>
<td>Management, professional, and related</td>
<td>726</td>
<td>29.5%</td>
<td>1,427,312</td>
<td>39.6%</td>
</tr>
<tr>
<td>Service</td>
<td>360</td>
<td>14.6%</td>
<td>562,727</td>
<td>15.6%</td>
</tr>
<tr>
<td>Sales and office</td>
<td>503</td>
<td>20.4%</td>
<td>785,567</td>
<td>21.8%</td>
</tr>
<tr>
<td>Farming, fishing, and forestry</td>
<td>55</td>
<td>2.2%</td>
<td>7,125</td>
<td>0.2%</td>
</tr>
<tr>
<td>Construction, extraction, and maintenance</td>
<td>219</td>
<td>8.9%</td>
<td>226,926</td>
<td>6.3%</td>
</tr>
<tr>
<td>Production, transportation, and material moving</td>
<td>344</td>
<td>14.0%</td>
<td>293,333</td>
<td>8.1%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. American Community Survey 5 year estimates.
## Business Patterns Totals in 2011

<table>
<thead>
<tr>
<th></th>
<th>Warren</th>
<th>Mass.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishments</td>
<td>78</td>
<td>169,146</td>
</tr>
<tr>
<td>Employment</td>
<td>1,091</td>
<td>2,960,712</td>
</tr>
<tr>
<td>Earnings ($000)</td>
<td>102,664</td>
<td>165,193,320</td>
</tr>
<tr>
<td>Average Wage per Job</td>
<td>94,101</td>
<td>55,795</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau Zip Code Business Patterns; Aggregated by STATS America
**Establishment Distribution**

<table>
<thead>
<tr>
<th>Business Patterns - Establishment Distribution in 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Establishments</td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td>Total Establishments</td>
</tr>
<tr>
<td>1-4 Employees</td>
</tr>
<tr>
<td>5-19 Employees</td>
</tr>
<tr>
<td>20 - 99 Employees</td>
</tr>
<tr>
<td>100 or More Employees</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau Zip Code Business Patterns; Aggregated by STATS America
## Educational Attainment

<table>
<thead>
<tr>
<th>Educational Attainment in 2012</th>
<th>Warren</th>
<th>Percent</th>
<th>Massachusetts</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population 25 and Older</td>
<td>3,556</td>
<td>100.0%</td>
<td>4,465,898</td>
<td>100.0%</td>
</tr>
<tr>
<td>Less Than 9th Grade</td>
<td>115</td>
<td>3.2%</td>
<td>216,669</td>
<td>4.9%</td>
</tr>
<tr>
<td>9th to 12th, No Diploma</td>
<td>370</td>
<td>10.4%</td>
<td>268,218</td>
<td>6.0%</td>
</tr>
<tr>
<td>High School Graduate (incl. equiv.)</td>
<td>1,206</td>
<td>33.9%</td>
<td>1,156,650</td>
<td>25.9%</td>
</tr>
<tr>
<td>Some College, No Degree</td>
<td>982</td>
<td>27.6%</td>
<td>739,171</td>
<td>16.6%</td>
</tr>
<tr>
<td>Associate Degree</td>
<td>238</td>
<td>6.7%</td>
<td>344,724</td>
<td>7.7%</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>536</td>
<td>15.1%</td>
<td>989,299</td>
<td>22.2%</td>
</tr>
<tr>
<td>Graduate or Professional Degree</td>
<td>109</td>
<td>3.1%</td>
<td>751,167</td>
<td>17.1%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. American Community Survey 5 year estimates.
WARREN CORPORATIONS, 2012

26 ALBANY STREET, INC., WARREN
ARAGORN INVESTIGATIONS INC, WARREN
B E C PLUMBING & HEATING INC, WEST WARREN
BEAUDRY TRUCKING INC, WARREN
BLONDIN PLASTERING INC., WARREN
BREEZELAND ORCHARDS, WARREN
CENTERED PLACE INC THE, WARREN
COMOS INC, W WARREN
COUNTRY LAND REALTY INC, WARREN
COUNTRYLAND HOMES REALTY INC, WARREN
CUSTOM CONFECTIONS INC., WARREN
D N G CONCRETE SERVICE INC, WARREN
EAST BROOKFIELD LAND INC, W WARREN
EDWARD H SPENCER INC, WARREN
EVERY PET’S DREAM INC, WARREN
FAMULARI CONSTRUCTION INC, WARREN
FF ENTERPRISES INC., WEST WARREN
FIJOLS JUNKYARD INC, WEST WARREN
FOUNTAIN & SONS FUEL CO INC, WARREN
GARREPY ENTERPRISES LLC, WARREN
GAUDREAU FOUNTAIN INSURANCE, WARREN
GREGORY E HENTZI INC, WARREN
HARDWICK KNITTED FABRICS INC, WEST WARREN
HILLVIEW SERVICES INC, WEST WARREN
HUMED ENTERPRISES INC, WEST WARREN
INFOMED EDUCATIONAL SERVICES INC, WEST WARREN
INTERCITY LINES INC, WARREN
KORZEC INSURANCE AGENCY INC, W WARREN
LIZAK BUS SERVICE INC, WARREN
MASSACHUSETTS BUILDING PRODUCTS, WARREN
MCCARTHY BROS FUEL CO INC, WARREN
MIKE GARREPY FOUNDATIONS INC, WARREN
MORGAN HARRISON COMPANY, INC, TH, WARREN
PRICELESS TRANSFORMATIONS, INC, WEST WARREN
QUABOG VALLEY MACHINE, INC., WEST WARREN
R J FIJOL INCORPORATED, W WARREN
RYBAK ENGINEERING INC, WARREN
S S SKOWYRA INC, WARREN
SAWMILL LANE LLC, WARREN
SCOTTISH MEADOWSs CORPORATION, WARREN
ST STANISLAUS SOCIETY INC, W WARREN
STACY EXPOSITION SERVICE INC, WARREN
TOMAR REALTY INC, E WARREN
TRI MAX CORPORATION, WARREN
VIBRANCE TECHNOLOGY CORPORATION, WARREN
WARREN COMMUNITY YOUTH SOCCER AS, WARREN
WARREN ELECTRICAL CONTR INC, W WARREN
WARREN PACKAGE STORE INC., WARREN
WARREN ROOFERS INC, W WARREN
WARREN SPA INC, WARREN
WILK BROS INC, WARREN
YANKEE AUTO ELECTRIC OF WARREN, WARREN

Source: Mass. Secretary of State, Corporations Book
Warren is in the Ware River Valley Economic Target Area, which provides incentives for economic expansion.

The Town may enter into Tax Increment Financing (TIF) Agreements to lower property taxes for job creating activities and private investment.

Companies may receive a 10% investment tax credit from the Commonwealth for qualifying projects.

Town Meeting approved a TIF in 2011 for Warren Pumps in return for a capital investment and creation of 35 new jobs.

In May 2014, Town Meeting approved an Economic Opportunity Area designation for the West Warren mill complex, including the former Wright Mill and Hardwick Knitted Fabrics properties.
**Agricultural Sector**

- Warren is an agricultural community with a diverse array of viable farming operations.
- Orchards, dairy operations, tree farms, and vegetable growing dot the landscape.

<table>
<thead>
<tr>
<th>Land in Agricultural Use (Ac.)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Orchard</td>
<td>227</td>
</tr>
<tr>
<td>Agricultural/Residential</td>
<td>1,530</td>
</tr>
<tr>
<td>Truck Crops</td>
<td>69</td>
</tr>
<tr>
<td>Field Crops</td>
<td>290</td>
</tr>
<tr>
<td>Accessory Land</td>
<td>329</td>
</tr>
<tr>
<td>Woodland in Ch. 61A</td>
<td>749</td>
</tr>
<tr>
<td>Pasture</td>
<td>435</td>
</tr>
<tr>
<td>Total</td>
<td>3,629</td>
</tr>
</tbody>
</table>

Source: Warren Assessors
Warren, Massachusetts
Agricultural Land

Prepared by the Warren Planning Department, December 2013.
Data Sources: Warren Assessors, MassGIS.
Information depicted on this map is for planning purposes only. This information is
not adequate for legal boundary definition, regulatory interpretation, or parcel-level
analysis. Use caution in interpreting positional accuracy.

Agricultural Land Use
- Orchard
- Agricultural/Residential
- Field Crops
- Pasture
- Productive Woodland

0 0.5 1 2 Miles
INFRASTRUCTURE
Sewage Treatment System

Warren Wastewater Treatment Facility

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Flow</td>
<td>1.5 mgd</td>
</tr>
<tr>
<td>Mean Monthly Flow</td>
<td>0.67 mgd</td>
</tr>
<tr>
<td>Available Capacity</td>
<td>0.83 mgd</td>
</tr>
<tr>
<td>Permit Number</td>
<td>MA0101567</td>
</tr>
<tr>
<td>Receiving Water</td>
<td>Quaboag River</td>
</tr>
</tbody>
</table>
Water System

<table>
<thead>
<tr>
<th>District</th>
<th>Population</th>
<th>Water Use (Mil. Gal.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warren</td>
<td>2,545</td>
<td>90</td>
</tr>
<tr>
<td>West Warren</td>
<td>670</td>
<td>39</td>
</tr>
</tbody>
</table>
Freight Rail Transportation

- The CSX Railroad main line traverses Warren and provides reliable and cost efficient transportation of goods throughout New England and the nation.
- Recent upgrades to the line and bridges allow double stacking of containers for greater efficiency.

CSX Railroad and Siding in West Warren

Wright Mill and CSX Railroad
**Education**

- Warren has an excellent schools system. It is one of two towns that comprise the Quaboag Regional School District.
- The Warren Elementary School and Quaboag Regional Middle High School consistently receive high marks by state educational officials for its quality of education.
- Quaboag is an approved “Innovation School” by the Mass. Dept. of Education because of its innovative teaching strategies that result in high student achievement.
COMMUNICATIONS AND BROADBAND

- Comcast Cable provides Warren with high speed internet access.
- The Massbroadband123 project brought fiber to Warren.
  - Fiberoptic lines are installed in poles along Route 67 from the West Brookfield Town Line to Warren Center.
  - Community Anchor Institutions (CAIs) in Warren with fiber access include the Fire Station, Library, Police Department, and Shepard Municipal Building.
  - Future phases will extend fiber to “last mile” users
- Cell phone service providers in Warren are AT&T, Verizon, and Sprint.
ECONOMIC ASSESSMENT
WARREN’S ECONOMIC STRENGTHS

- Blue collar labor force
- Available water and sewer capacity
- Single tax rate for all classes of property
- Reasonable highway access
- Large developable parcels
- Productive farms and access to locally grown food
- Freight rail access
- Excellent community schools
- Abundant floor space and low cost rents in former mills
- Located in an Economic Target Area for access to Tax Increment Financing
- Plentiful open space and scenic beauty
ECONOMIC DEVELOPMENT PRIORITIES

- Good paying blue collar jobs
- Direct Access to the Mass. Turnpike in Warren
- Expansion of fiberoptic lines for high speed broadband
- Better cell phone reception
- Promotion and marketing of agricultural products
- Construction of a rail spur over the Quaboag River into the former Wright Mill
Economic Development Strategy

- Promote and Support Mill Redevelopment
  - Warren Pumps
  - Former Wright Mill
  - Former Hardwick Knitted Fabrics

- Encourage Village Center Revitalization
  - Occupy Vacant Storefronts, e.g. Tebos, Cakettes, Railroad Station
  - Continue Town Center Transportation Improvements

- Work with the state university system to open a satellite campus in Warren

- Attract Large Employer for the Major Development Overlay District

- Large parcels are ideal for solar farms. A large National Grid substation is a vital link in the regional grid. Warren has over 20 MW of solar under development.
ECONOMIC DEVELOPMENT STRATEGY, CON’T

- **Assist Labor Force**
  - Work with QVCDC and South Central Chamber on workforce education programs
  - Encourage industries that match the skills of the workforce

- **Market Warren to the World**
  - Promote Warren on the Web
  - Provide information to the CDC and Chamber of Commerce to place on their web pages
**ECONOMIC DEVELOPMENT STRATEGY, CON’T**

- Enlist help of State Economic Development Officials
  - Apply for State and federal economic development grants that can benefit Warren and attract new investment

- Establish a business incubator in Warren to encourage small business start-ups by providing technical assistance and access to services at minimal cost.

- The QVCDC offers low interest loans ranging from $500 to $100,000 to companies wishing to expand or open new operations. The Town can work with the agency to assist Warren businesses.
Questions and Comments