

SWOTCI SYNTHESIS REPORT

APRIL 16, 2021

Introduction: SWOTCI and Shelter Island Comprehensive Planning

SWOTCI, an acronym for **S**trengths, **W**eaknesses, **O**pportunities, **T**hreats, **C**hallenges and **I**mperatives, is a planning tool that makes complex information easier to understand so that we can see what needs to be done. The purpose of the SWOTCI analysis is to take an often-bewildering number of issues and opportunities – some within the island and others affecting it from outside – and put them into a coherent framework. This allows for an objective analysis of each factor on its own terms, including positive elements that the town can build on, and negative factors that need to be addressed. It also intentionally separates those *internal* factors over which the town has direct control from those *external* factors it cannot control but to which it must react.

This report includes a look back at SWOTCI analysis in previous Comprehensive Plans, and presents a synthesis of the 2020-2021 results from the first survey, the first public workshop, stakeholder interviews conducted thus far, feedback on the Shelter Island 2020 report, and input from the Comprehensive Plan Advisory Committee (CPAC) and Comprehensive Plan Task Force (CPTF), using the SWOTCI categories as an outline. These are defined as follows:

- **Strengths:** Positive characteristics or attributes of Shelter Island that make it unique and desirable as a place to live, work or visit. Primarily internal, these represent positive attributes that should be protected and built upon.
- **Weaknesses:** Negative characteristics or attributes of Shelter Island that keep it from achieving its potential. These are also primarily internal, representing things over which the town has some measure of control.
- **Opportunities:** Ideas and potential initiatives for keeping Shelter Island a desirable place to live, work and visit – and making it even better. These can be internal factors or external trends that the town can use to its advantage.
- **Threats:** Factors or trends that negatively impact the social, economic and/or environmental quality of life on Shelter Island. These are primarily external factors over which the town has little direct control.
- **Challenges:** Barriers to building on Shelter Island’s strengths, taking advantage of opportunities and avoiding or mitigating threats.
- **Imperatives:** The most critical cross-cutting issues that must be addressed in order to keep Shelter Island a desirable place to live now and in the future.

SWOTCI Analysis in Previous Comprehensive Plans

Neither the 1994 Comprehensive Plan nor the 2008-2009 Comprehensive Plan Review process employed a formal SWOTCI analysis, though both evaluated existing resources and listed issues and challenges facing the town. Water was a key theme of the 1994 Plan, which identified threats to the ground and surface waters and the Peconic Bay, and listed among its goals protection of these resources through conservation, enhanced regulation and careful management. The 1994 Plan also identified the importance of historic and cultural resources to the Island's character and economy, and listed threats from neglect and redevelopment. Goals included protection of the Island's "small-town community and way of life, its rural character, and the natural resources which support those qualities."

Growth and land use change were a major issue for the Island in 1994, which at that point was seeing more than 40 new homes built each year. They recognized the implications of that rate of development, and recommended setting and implementing clear priorities for conservation and working to limit the rate of growth and the size of houses. As we find today, in 1994 house prices were rising much faster than incomes, and one goal was to "create and maintain affordable housing opportunities for the diversity of age and income groups that make up Shelter Island's year-round population." A related objective was assuring that new housing or conversions of existing housing "will be carried out in harmony with the environment, with the supply and quality of natural resources, and with the particular style and character of Shelter Island's existing housing and traditional development patterns."

The Economic Development, Transportation and Community Facilities elements of the 1994 plan took a similar approach, emphasizing protection of existing resources, targeted improvements to facilities, and balancing of costs and benefits to the town. The plan identified the need to balance the summer economy with year-round needs, and recommended removing unnecessary regulations and encouraging business sectors rooted in the local landscape – fishing, farming, marine services, etc. No major issues were identified with the existing conditions of roads, town buildings or other public facilities at that time, though the potential for ongoing development raised the future threat of increasing traffic and solid waste generation. The clearest imperative was the need to protect the town's water supply.

The 2008-2009 Comprehensive Plan Review found that many of these issues remained, and some were getting worse. One part of the charge to that committee was to review the goals and objectives of the 1994 plan and "to identify those current and possible challenges and issues which have or might continue to hamper achieving those Goals and Objectives..." The challenges the Review Committee identified were:

- Increased cost of living and changing demographics resulting in a decline of the "balanced community" – with the population of working, full time residents and

families with children in Island schools declining relative to second homeowners and retirees.

- Increasing house size through development of large new homes and replacement of existing smaller homes.
- Increasing population and housing density in sensitive areas above the aquifer, particular through development of existing nonconforming lots.
- Ambiguity in town codes, resulting in confusion, lost time and inconsistent enforcement.
- Trend toward landowners challenging town codes rather than respecting and following their intent for the good of the community.
- Lack of a master plan for areas near tidal waters and freshwater ponds, leading to development in sensitive areas.
- A single overlarge and undifferentiated business zone, leading to inefficient commercial sprawl and mixing of unsuitable businesses.
- Confusing rules and lack of policy for regulating home businesses.
- Decline of local businesses due to seasonal swings, high land costs and reliance on the construction industry.
- Risks to the aquifer from pesticides, fertilizers, pool maintenance, large lawns and oversize houses.
- Limited mechanisms to protect scenic views, fields, woodlands and trees.
- No effective policy for controlling invasive plant species.

While the 2008-2009 Plan Review didn't develop a list of opportunities, per se, it set forth a list of 42 "new or renewed initiatives" designed to help deal with these challenges. In reviewing the town's progress on implementing these initiatives for the current Comprehensive Plan Update, it was determined that 2 were completed (updating storm water code and dock policies) and 17 were not addressed (most dealing with changing zoning and other regulations). Good progress was made on 17 items. This included establishing a GIS mapping database, building and renovating public toilets, advancing conservation and stewardship of open space, and bringing the town into compliance with federal storm water mandates. Some progress was made on 15 items, including updating policies and codes regulating wetland protection and beach access, tweaking requirements for special permit review, requiring a special permit for houses over 6,000 square feet, and pursuing plans for community housing. While the 2009 Comprehensive Plan Review recommendations were not officially adopted, they do seem to have been reflected in town actions over the years.

The 2020-2021 SWOTCI Public Participation Process

The master list of SWOTCI items described below was compiled based on the collective input received through multiple sources of public involvement. In some cases, specific questions were posed to participants based on the SWOTCI categories as part of committee meetings, workshop group sessions, and the survey. In other cases, items mentioned by participants were sorted into the most appropriate category as the full list was compiled. The process included five principal involvement methods:

Comprehensive Plan Advisory Committee

The 12 members of the CPAC meet monthly to review plans, schedules and products and assist in the public outreach process. They also review materials between meetings and played an important role in reviewing the Shelter Island 2020 Profile and other documents. At several meetings the CPAC listed and discussed key issues and opportunities facing the island, which have been incorporated into the SWOTCI.

Stakeholder Interviews

Completed between November, 2020 and February, 2021, more than 15 in-depth interviews were conducted with key community stakeholders: Building Department, Chamber of Commerce, Emergency Medical Services, Engineering Department, Fire Department, Green Options Committee, Historical Society, Mashomack Preserve, Police Department, Public Library, Recreation Department, School District, Senior Center, Shelter Island Association, Shelter Island Heights Property Owners Corporation, and Sylvester Manor Educational Farm.

Shelter Island 2020 Profile

The profile report was prepared by the consulting team with extensive input from the CPAC and the Comprehensive Plan Task Force (CPTF). Each of the principal chapters of the report concludes with a list of key findings and challenges that were incorporated into the SWOTCI as appropriate.

Public Visioning Workshop #1

The first public workshop was held (over Zoom) on March 18th, 2021. Around 70 full- and part-time residents attended the meeting, along with 25 members of the CPAC, CPTF and consulting team. Nine small groups, facilitated by CPAC members, discussed a series of questions revolving around strengths, weaknesses, opportunities and threats facing the island.

Public Survey #1

The first public survey was available between February 22 and March 12, 2021 and garnered over 1000 responses, evenly divided between full- and part-time residents. Questions were shaped by the SWOTCI framework, including strengths (“what are your three favorite things about Shelter Island?”) and weaknesses (“what are the top three things about Shelter Island that you think need to be fixed?”). Threats were elicited by a

question about whether “quality of life on Shelter Island improved, stayed the same or declined” over the last 5-10 years, while opportunities were evoked by other open-response questions, including the subjects of public services and facilities and the role of Shelter Island’s government.

A Synthesis of SWOTCI Priorities from All Input Methods

In order to identify shared priorities, a matrix was developed listing nearly 200 distinct factors or ideas put forward by the various participants (see appendix). In some cases, closely related items were combined within a single row. The columns in the matrix represent each of the input methods. These include each of the nine breakout groups at the first workshop, as well as input from the CPAC, the stakeholder interviews, and the survey results.

Items put forward by the workshop groups were listed first, and if they were mentioned by more than one group the box in that group’s column was colored in. If the same items were mentioned in the survey or other input methods, the corresponding box in those columns were also colored in. In addition, items mentioned by more than ten respondents to the survey were highlighted with an “x”. In the final matrix, items that received the most mentions can be picked out by rows that are more completely colored-in. Items that were mentioned only a few times can easily be identified by a lack of colored boxes in their respective rows.

Once the matrix was completed listing all the items mentioned, ideas were grouped into categories according to shared themes within each of the major SWOTCI categories:

- **Strengths:** Natural Beauty and Access to Nature; Sense of Place; Sense of Community; and Quality of Life.
- **Weaknesses:** Housing and Jobs; Economic Constraints, Public Services and Facilities; Governance; and Quality of Life.
- **Opportunities:** Environmental Protection; Housing; Economy; Governance; Public Services and Facilities; and Building Community.
- **Threats:** Changing Environment; Changing Economic Conditions; Loss of Housing & Jobs for Ordinary People; Quality of Life; and Community Life.
- **Challenges:** Economics; Decision-making and Governance; and Land Use

Finally, within each theme the items mentioned most frequently across all input methods, as indicated by the more completely filled-in rows, were moved to the top of each section. These represent the shared SWOTCI priorities which are highlighted in the following sections. Please keep in mind that items that are not described below will not be forgotten – as the plan develops all of the input materials will be reviewed again to make sure that important ideas are not lost – even if they were not mentioned by multiple parties during the SWOTCI process.

Strengths

Natural beauty and access to nature

Participants universally listed the natural setting of the island as a top strength, including the beaches, marshes and other coastal features of the Peconic Bay, as well as the forests, ponds and wetlands within the Island. Easy access to these resources and the ability to continue hunting and fishing are just as important. The Mashomack Preserve was called out as a key asset for both conservation and public access.

Sense of Community

A sense of community is a fundamental strength, generally described as a sense of mutual respect, generosity and friendliness that has developed over generations among both year-round and summer residents. People know and support each other, which is reinforced by a focus on family and school, and a tradition of volunteerism in local institutions and government. Annual community events help to reinforce community spirit, bringing together Islanders from all walks of life.

Sense of Place

The beauty of the land and the strength of the community spirit create a combined strength that many participants identify as “sense of place.” The special character of the Island makes it a place apart, but its location makes it easy to be connected to the wider world. There is a sense of history and connection to previous generations, and a tradition of simplicity and modesty in the Island lifestyle that is cultivated and cherished. For many this makes it “the land that time forgot,” the “un-hamptons.”

Quality of Life

The Island’s slower pace, with no traffic, stop lights or chain stores, and limited night life, was identified as a key strength. Beaches and open spaces are uncrowded, except in peak season, and many participants point to that sense of serenity that arrives when crossing the ferry channel and arriving in the relative peace & quiet of the Island. The Island is considered very safe, and a great place to raise a family. This is supported by the many local institutions that make life better: library, school, senior center, music programs, and access to local food and seafood at informal stands.

Weaknesses

Housing and Jobs

Lack of affordable housing for both working people and the middle class, especially the limited number of year-round rentals, is widely seen as a common issue affecting the ability of young people, working families, and some seniors, to stay on the island. This is

made worse by the lack of well-paid year-round jobs for ordinary people. The result is a potential decline in the number of families in the school and a trend of young people leaving after high school and not returning after graduating from college or completing military service.

Economic Constraints

The seasonal nature of the Island's economy limits the ability of businesses to grow and sustain themselves, especially year-round businesses. As throughout the region, the changing retail market, especially the growth of on-line retail, has also likely contributed to vacant commercial properties. Many people note the related decline in the character of Rt. 114 and point out the lack of a strong commercial center. Real Estate services and construction are seen as dominating the economy, with a focus on the second home community. Prices for food, transportation and other goods and services are perceived as higher on the island, including the cost of riding the ferry.

Public Services and Facilities

The limited health care services available on the island are seen as a weakness, with particular concern about substance abuse treatment, as well as health care and emergency services for the elderly. There is concern that the Shelter Island school, post-Covid, could reach an unsustainable enrollment level, and needs to provide better services to the growing Latino community. The lack of facilities for biking and walking, other than in limited areas, is seen as a weakness in safety and enjoyment of the island. Difficulty in accessing businesses without a car can be a problem for both customers and workers. Reliance on individual wells and septic systems for most of the island is seen as limiting opportunities for affordable housing and other services, as well as contributing to contamination of ground and surface waters.

Governance

Weaknesses identified in Shelter Island's government structure revolved around consistency of leadership, and a small staff sometimes struggling to implement policy directives. This is seen as leading to several issues: a lack of long-term planning; loss of institutional knowledge with every change of administration; and changing leadership styles. There is a perception that while regulations have been adopted to solve certain problems, the lack of both the staff capacity and will to enforce them allows those problems to fester.

Quality of Life

While the quality of life on the island is generally highly valued by participants, it has some negative aspects, including the relative isolation and lack of activities and services in the winter, which is felt especially by seniors. Increasing traffic, littering, and the limited number of public toilets are noted, especially with the expansion of the population during the summer months, together with noise and pollution from leaf blowers and lawn equipment. Quality of life is also weakened by deer overpopulation

and the spread of tick-borne diseases. Finally, the lack of racial, ethnic and economic diversity on the Island is perceived as a weakness, together with the “us vs. them” attitude that sometimes emerges from the divergent interests of year-round and summer residents, affluent and middle class, newcomers and old-timers, etc.

Opportunities

Environmental Protection

Priority opportunities include building on existing green initiatives to become a model of sustainability: investing in solar power, wind energy and other alternatives; recycling organic waste into compost; and landscaping with native species. This includes working to reduce pollution by promoting best practices for protecting water quantity and quality, replacing old septic systems with innovative/advanced systems, and pursuing broad testing of wells to track nitrates and other pollutants. Opportunities were also identified in additional conservation of open space, especially farmland, and putting that land to active use with other benefits to the economy and the environment.

There is support for building resilience to the impacts of climate change, especially in readying Shelter Island for continued sea level rise. These same efforts can help the Island recover more quickly from severe storms, as well as preparing for periods of drought that are likely to become more common over time. This would include reinvigorating the town’s efforts to build public awareness of the impacts of irrigation, swimming pools and landscaping practices that increase stress on the Island’s watershed, and elevating certain roads and structures.

Housing

Construction of affordable and attainable housing for young people, families and the elderly is a top priority, including allowance of multigenerational homes on the same property, with design standards to manage adverse impacts. There is interest and support for a permanent community center facility, possibly with a pool, to complement the housing. An important focus of any housing initiative would be creation of rental housing for smaller households. Opportunities were also identified to consider tax incentives to support seniors on fixed incomes, and community-supported housing concepts that allow for private ownership - building equity for young families while limiting long-term price escalation.

Economy

There is broad support for planning holistically for business growth and sustainability, with a focus on revitalizing the Town Center and other commercial nodes. Participants noted a desire to support small, year-round businesses. There were many opportunities noted for economic development focused on local resources and employment for young people from the Island, including bringing back legacy businesses like boatbuilding,

expanding training in building trades, expanding local agriculture and food production, and supporting oyster farming and other water-based businesses with dock access and support services. Opportunities for capitalizing on the growth in remote work and internet-based businesses were also identified.

Governance

There were many opportunities raised for improving government services, with no strong priorities indicated, but with a general focus on encouraging volunteerism and balancing provision of adequate level of services with a reasonable level of taxation and revenue. This included addressing opportunities to enhance town staffing with a town manager, planner or other staff that could implement plans consistently over time and see plans through to completion. The need to build community consensus through consistent outreach and communications was mentioned in several groups. Within the functions of government, opportunities were identified to develop a multi-year Capital Plan and asset management system, support by a sustainable Capital Reserve Fund. Also raised was the need to update and streamline regulations and provide for more consistent code enforcement.

Public Services and Facilities

There was broad support for provision of additional services, including health and wellness, especially to the elderly. This can build on existing resources such as the School and Senior Center, as well as the Public Library, which already provides a broad range of social, health and recreational services to youth, families and seniors – if additional space can be created. Other priorities included support for improving pedestrian facilities to make walking safer and provide for a continuous network of sidewalks and paths across the Island. Related to this, the opportunity and need for bike access improvements was raised frequently, though some participants also noted the limitations of the Island’s narrow roads to accommodate bikes without major reconstruction.

Building Community

Participants raised and supported opportunities for promoting neighborliness, with a focus on building bridges between young and old, full- and part-time residents. This included welcoming new young people and families, helping neighborhood kids, encouraging racial diversity and acceptance of differences, and increasing neighborhood and community interaction and communication. This can be reinforced by expanding off-season activities, and rebuilding community events that were put on hold after Covid, such as the Memorial Day Parade, Chicken Barbecue, 10K Run, and events supporting the volunteer Fire and EMS services.

Threats

Changing Environment

Potential decline in quantity and quality of drinking water is seen as a key threat across the board, and specific issues were raised that included saltwater intrusion, nitrate contamination, and the limited overall capacity of the aquifer. The threat of climate change and sea level rise was also mentioned by most of the groups, along with potential impacts like loss of beaches and marshes because of bulkheading, and flooding of low-lying roads, homes and businesses. Other environmental threats include decline of the marine environment of the Peconic Bay and loss of traditional fisheries, including scallops.

On land, participants raised the threat of an overpopulated deer herd, with its associated ticks and tick-borne diseases. They also are concerned about the loss of trees to old age and development pressure, and ecological changes to the woodlands due to climate change and invasive species. Several groups noted the environmental threat posed by the larger houses and their associated landscape and lifestyle, including water use for irrigation and swimming pools, aggressive landscape maintenance, and desire to control and eliminate insects and other wildlife.

Changing Economic Conditions

The impact of a changing regional economy, especially the Island's growing wealth and affluence, were identified by most groups as a threat to the ability of ordinary people to remain on the Island. The Island is becoming more of a second home community, more exclusive, more like the Hamptons. This is made real for many people in the continued growth of very large houses and their associated social, visual and environmental impacts. Participants also identified threats to the business economy, witnessed in the empty storefronts and declining condition of the 114 corridor, the impact on retail of internet shopping, and the recognized financial challenges of running a year-round business in a seasonal community.

Loss of Housing and Jobs for Ordinary People

Every group highlighted the threatened loss of young people and families – the future of the community – because of the lack of affordable year-round housing, combined with the lack of well-paid year-round jobs. This is seen as leading to a host of secondary impacts: inability to attract and keep police, fire and EMS personnel; difficulty in attracting applicants for teaching positions at the school; and declining enrollment, lower school ratings, and potential loss of the high school to the mainland.

Quality of Life and Community

Participants identified threats to quality of life that included the potential decline in safety and security as the Island grows and becomes more like the rest of Long Island. Growth also threatens incremental increases in traffic, noise, light pollution and impacts

to the water supply, as well as overcrowded beaches, littering, and deterioration of roads from heavy construction vehicles. Too much growth is also seen as carrying with it the threat of proliferating cable and electrical lines that detract from the visual character of the island, and a continued decline in the character of 114 and the town center as business activity shifts to construction and services in support of the second home community.

Growth and economic change are also seen as carrying with them the loss of the small-town traditions of neighborliness and shared purpose – replacing interest and support for local events and institutions with gated estates, oversized houses, law suits and nimbysism.

Challenges

Environment

The impact of climate change, sea level rise and extreme storms is becoming clearer with each passing year, but state and local policies and funding strategies are still catching up. The practical difficulties and financial costs of needed mitigation measures may require significant realignment of priorities on many levels of government in order to implement effective solutions.

Economics

Among the barriers to economic sustainability, the seasonal nature of life on the island is seen as a foundational issue. With a small year-round population, it is hard to sustain services and businesses, and those that do succeed often focus on summer residents and tourism rather than providing services for year-round residents.

Housing and Jobs

The lack of affordable housing is another challenge, especially year-round rentals and homes for summer employees. This limits the ability of both the town and local businesses to find employees, raising the cost of doing business for everyone.

Decision-Making and Governance

As in small towns everywhere, the ability to expand government services and efficiency is limited by budgetary concerns and reinforced by rural traditions of individual responsibility rather than collective action. There is a strong ethos of neighbor helping neighbor, providing informal economic support and social services, that limits enthusiasm for government taking on a greater role.

These philosophical and financial realities limit the town's ability to make short term investments in staff, facilities and infrastructure, even to achieve demonstrable long-

term financial benefits. This in turn limits the town's capacity for effective planning and implementation, standing in the way of adopting modern systems of capital planning, asset management, record keeping and regulation that could likewise save money in the long run.

Land Use

While there is room for growth on the Island, there is a finite number of buildable lots remaining, driving up the cost of real estate and increasing pressure to tear down and expand existing homes. While zoning could be changed to encourage smaller and more diverse housing in appropriate areas, the Island's complex topography and existing patterns of conservation and development limit those opportunities. Another practical barrier is the lack of public water supply and shared wastewater systems that could support more compact growth patterns in the town center and elsewhere on the Island.

Imperatives

As the planning process moves forward, attention will shift towards identifying imperatives and creating an action strategy to address these most critical cross-cutting issues. This began during the SWOTCI process but has not been vetted by additional public input. What follows are themes that can serve as the foundation for further discussion. As noted below, there are some imperatives that have broad support (protecting water supply), while others will likely engender a healthy debate (such as the desired extent of future growth and development, balancing tax revenues with the cost of services, and determining the ideal size and role of town government).

Environmental Sustainability

- Protect the aquifer and its watershed, and ensure long-term availability of safe drinking water to every resident.
- Protect surface water quality.
- Work proactively to plan for and adapt to climate change and sea level rise.
- Restore and maintain a balanced ecosystem on the island and in the surrounding waters, including managing the deer herd and rebuilding local fisheries.

Effective Governance

- Build on energy of this Comprehensive Planning process and ensure that the plan becomes a living document.
- Build capacity to implement the plan and change policies and practices to provide for more consistent follow through.
- Improve and modernize the functions and services of government, determining the appropriate level of staff and ideal balance of town investments and taxes.

Attainable Year-Round Housing

- Ensure a sustainable supply of affordable and attainable housing, which is fundamental to maintaining the social and economic diversity of the community.
- **Develop housing programs that assist with private ownership and affordable year-round rentals.**

Managing Growth and Change to Maintain Sense of Place

- Establish a clear plan for conservation and development that can guide growth and change as remaining vacant land is either preserved or developed.
- Manage large houses and other development impacts and promote revitalization of Rt. 114 and existing centers of commercial activity and community life.
- Make the island walkable and bike able.

Building Community

- Build and sustain long-term social and economic diversity among the town's population.
- Support people, programs and institutions working to build bridges between young and old, full- and part-time residents, and maintain mutual respect and neighborliness.