TOWNSHIP OF TOMS RIVER

MASTER PLAN
ECONOMIC PLAN ELEMENT

Township of Toms River
Ocean County, NJ

DRAFT: May 4, 2017

Prepared by:

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EP-1
ECONOMIC PLAN ELEMENT

Although it is an optional Master Plan Element, the MLUL stipulates that any Economic Plan Element included as part of a comprehensive master plan should consider all aspects of economic development and sustained economic vitality. The Economic Plan Element should include a comparison of the types of employment expected to be provided by the economic development to be promoted with the characteristics of the labor pool resident in the municipality and nearby areas; and an analysis of the stability and diversity of the economic development to be promoted.

This Economic Plan Element evaluates the economic, employment and income trends and projections in the municipality comparatively with those of Ocean County and the State of New Jersey. The strengths and weaknesses of the local economy are than evaluated, in order to identify areas in need of improved land use development, traffic patterns, infrastructure and recreation in order to maintain and enhance the stability and diversity of the Township’s economic structure. This economic plan identifies strategies and recommendations on how the community can improve its capacity to grow and develop economically, socially, educationally and culturally.

Labor Force

Ocean County has the second highest job deficit in the state. In September of 2015 according to the New Jersey Department of Labor there were 265,400 Ocean County residents in the labor force as compared to 137,523 employed by the private sector jobs located in the county. This equates to a deficit of 127,877 jobs that are not provided by the private sector in Ocean County. A large amount of Ocean County residents must commute outside of Ocean County to seek employment. Hudson County is the only county in New Jersey that has a higher private sector job deficit.

Ocean County has the third lowest ratio of private sector jobs to labor force. Ocean County’s rate in 2015 was 0.52, while New Jersey’s was 0.75. Only Sussex and Warren County had lower rates. In addition, Ocean County has the second lowest weekly private sector wage rate. The average weekly wage rate for the private sector in Ocean County is $720, while New Jersey’s average weekly wage rate for the private sector is $1102. This is a difference of $382 per week. Only Cape May County has a lower weekly rate than Ocean County.

The NJ Department of Labor maintains labor force data for municipalities however the most current data is from 2013. In 2013, Toms River Township’s weekly private wage was slightly higher than Ocean County’s wage rate at $759, however much lower than New Jersey’s average weekly rate of $1135. The low private sector weekly wage rate can be attributed to the fact that retail trade is the second leading industry for Toms River Township. In addition, Toms River Township has many tourist related jobs that also tend to pay a lower wage rate.
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantic</td>
<td>126,700</td>
<td>106,274</td>
<td>0.84</td>
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<td>Bergen</td>
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<td>0.74</td>
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<td>Cape May</td>
<td>51,900</td>
<td>38,562</td>
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<td>Cumberland</td>
<td>66,600</td>
<td>48,320</td>
<td>0.73</td>
<td>18,280</td>
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<td>Essex</td>
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<td>108,402</td>
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<td>Gloucester</td>
<td>148,500</td>
<td>84,331</td>
<td>0.57</td>
<td>64,169</td>
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<td>Hudson</td>
<td>358,500</td>
<td>207,155</td>
<td>0.58</td>
<td>151,345</td>
<td>$1,283</td>
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<td>Hunterdon</td>
<td>65,400</td>
<td>39,483</td>
<td>0.60</td>
<td>25,917</td>
<td>$1,071</td>
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<tr>
<td>Mercer</td>
<td>197,200</td>
<td>172,437</td>
<td>0.87</td>
<td>24,763</td>
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<td>Middlesex</td>
<td>437,700</td>
<td>352,158</td>
<td>0.80</td>
<td>85,542</td>
<td>$1,127</td>
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<td>Monmouth</td>
<td>328,700</td>
<td>222,586</td>
<td>0.68</td>
<td>106,114</td>
<td>$913</td>
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<td>Morris</td>
<td>260,200</td>
<td>257,522</td>
<td>0.99</td>
<td>2,678</td>
<td>$1,394</td>
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<tr>
<td>Ocean</td>
<td>265,400</td>
<td>137,523</td>
<td>0.52</td>
<td>127,877</td>
<td>$720</td>
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<tr>
<td>Passaic</td>
<td>246,200</td>
<td>136,776</td>
<td>0.56</td>
<td>109,424</td>
<td>$906</td>
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<tr>
<td>Salem</td>
<td>31,000</td>
<td>17,103</td>
<td>0.55</td>
<td>13,897</td>
<td>$1,044</td>
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<td>Somerset</td>
<td>172,600</td>
<td>165,816</td>
<td>0.96</td>
<td>6,784</td>
<td>$1,468</td>
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<td>Sussex</td>
<td>76,400</td>
<td>31,714</td>
<td>0.42</td>
<td>44,686</td>
<td>$743</td>
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<tr>
<td>Union</td>
<td>276,300</td>
<td>186,502</td>
<td>0.67</td>
<td>89,798</td>
<td>$1,190</td>
</tr>
<tr>
<td>Warren</td>
<td>56,900</td>
<td>28,570</td>
<td>0.50</td>
<td>28,330</td>
<td>$896</td>
</tr>
<tr>
<td>New Jersey</td>
<td>4,501,500</td>
<td>3,355,452</td>
<td>0.75</td>
<td>1,146,048</td>
<td>$1,102</td>
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</table>

<table>
<thead>
<tr>
<th>Toms River Labor Force and Private Sector Job Comparison - 2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toms River</td>
</tr>
<tr>
<td>------------</td>
</tr>
<tr>
<td>Toms River</td>
</tr>
<tr>
<td>Ocean County</td>
</tr>
<tr>
<td>New Jersey</td>
</tr>
</tbody>
</table>

Source:
Annual Labor Force
NI Department of Labor and Workforce Development, Employment & Wages, Quarterly Census of Employment & Wages, BLS Quarterly Report for New Jersey & 21 Counties, third quarter, September 2015

Private Sector Job & Wages

*2013 Weekly Rate and Private Sector Employment
Annual Municipal Sector Data -2013, Average Annual Employees for private sector Jobs and Average Annual Weekly wage.

EP-3
OCEAN COUNTY ECONOMIC AND EMPLOYMENT TRENDS

Ocean County is a less prosperous area in terms of employment than much of New Jersey (see Table 1). It is the County with one of the lowest percentage of population in the labor force (it was the lowest in 2006 and has overtaken Sussex and Warren counties over the past 10 years). The per capita family income in Ocean County was thirteenth in the state in 2000 with a per capita income of $23,054 versus the New Jersey average of $27,006. A number of summertime resort communities occupy the County of Ocean and the population and economic prosperity in these communities is largely dependent on premier summertime weather. Additionally, a number of senior communities exist in Ocean County that may account for the low percentage of resident employment in Ocean County.

According to the 2000 United States Census, the unemployment rate in Ocean County was 5.2%, slightly lower than the State rate of 5.3%. However, the New Jersey Department of Labor estimated both of those percentages have improved to 4.9% and 4.8% respectively by 2004. Similar to New Jersey, management and sales occupations are the largest employment industries in Ocean County, but management and service occupations saw the most growth during the decade from 1990-2000.

Another factor in the labor supply is the mobility of the labor force and commuting patterns. Journey-to-work data from the 2000 census shows that approximately forty-two percent (42.3%) of the Ocean County working population commutes to another county for work. Therefore, the County depends heavily on private transportation for mobility. In going to work in 2000 only 1.9% of the residents took mass transit to work and 10.5% traveled in carpools. This journey-to-work pattern increases reliance on the crowded highway system and it demonstrates the need to attract major employers to Ocean County to provide shorter trip distances to work. Current demographic data indicates that this trend is still valid.

OCEAN COUNTY INDUSTRY EMPLOYMENT PROJECTIONS

The New Jersey Department of Labor estimates Ocean County's occupational employment to increase from 155,250 in 2002 to 181,800 by 2012. The 2002 estimated occupational employment in Ocean County made up 3.7 percent of the estimated occupational employment in the entire State of New Jersey. By 2012, that number is expected to increase slightly to 3.8 percent.

Employment growth is projected to occur in both the goods-producing and service-producing sectors, though greater growth is expected in the service-producing sector. The fastest growing industry in the goods-producing sector is expected in construction, while the fastest growth in the service-producing sector is expected in the healthcare...
and social assistance industry. Professional and technical services are also expected to have rapid growth through 2012. Manufacturing of goods; transportation and warehousing services; utilities and information services are all expected to decline. A decline in employment of the federal government industry is also expected, though an increase in overall government employment is anticipated. The largest decline in service producing industries is expected in the transportation and warehousing service sector.

OCEAN COUNTY OCCIDENTAL PROJECTIONS
From 2002 to 2012, Ocean County should expect to see an increase in employment for all occupational groups except production occupations, which are expected to decrease by 1.9%. The largest increase is expected in professional and related occupations. Construction and extraction occupations, and service occupations are also anticipated to have substantial growth, as depicted in Table 7.

Table 7
Estimated and Projected Ocean County Employment

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2002</th>
<th>2012</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management, business and finance</td>
<td>9,650</td>
<td>11,400</td>
<td>18.4</td>
</tr>
<tr>
<td>Professional and related</td>
<td>28,900</td>
<td>36,250</td>
<td>25.5</td>
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<tr>
<td>Service</td>
<td>36,700</td>
<td>44,450</td>
<td>21.1</td>
</tr>
<tr>
<td>Sales and related</td>
<td>21,750</td>
<td>24,900</td>
<td>14.7</td>
</tr>
<tr>
<td>Office and administrative support</td>
<td>28,600</td>
<td>31,200</td>
<td>9.1</td>
</tr>
<tr>
<td>Construction and extraction</td>
<td>8,860</td>
<td>11,000</td>
<td>24.6</td>
</tr>
<tr>
<td>Installation, maintenance and repair</td>
<td>6,200</td>
<td>7,050</td>
<td>13.1</td>
</tr>
<tr>
<td>Production</td>
<td>5,350</td>
<td>5,250</td>
<td>-1.9</td>
</tr>
<tr>
<td>Transportation and material moving</td>
<td>9,250</td>
<td>10,250</td>
<td>10.5</td>
</tr>
<tr>
<td>Total, all occupations</td>
<td>155,250</td>
<td>181,800</td>
<td>17.1</td>
</tr>
</tbody>
</table>

Source: NJ Department of Labor and Workforce Development
September 2005

TOWNSHIP OF TOMS RIVER
Historically, Toms River’s proximity to the Toms River, Barnegat Bay and Atlantic Ocean has helped the Township develop as a natural center for commerce. Downtown Toms River served as a regional trade center throughout the 18th, 19th and early part of the 20th century. In recent times however, Downtown Toms River has served more as a civic center for the Ocean County and municipal offices. Professional uses, specifically law offices and medical offices, also are abundant in the Downtown area and near the Community Medical Center. Route 37 is almost entirely comprised of retail use. Major retail can also be found at the corner of Hooper Avenue and North Bay Avenue where the Ocean County Mall and Sea Court Pavilion are located. Smaller retail locations are found in centers throughout the Township and along Route 9.
Household and Employment Forecasting:

<table>
<thead>
<tr>
<th>Toms River Household and Employment Projections</th>
<th>2000</th>
<th>2010</th>
<th>2020</th>
<th>2030</th>
<th>2040</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Households (TR Projected-straight line projection)</td>
<td>31674</td>
<td>34770</td>
<td>38158</td>
<td>41875</td>
<td>45955</td>
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<tr>
<td>Households (NJTPA Projected)</td>
<td>31674</td>
<td>34770</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment (TR Projected – straight line projection)</td>
<td>43521</td>
<td>43574</td>
<td>43575</td>
<td>43576</td>
<td>43577</td>
</tr>
<tr>
<td>Employment (NJTPA Projected)</td>
<td>43521</td>
<td>43574</td>
<td></td>
<td></td>
<td>52200</td>
</tr>
</tbody>
</table>

The Township utilized a flat growth projection based on the difference between the 2000 and 2010 Census to estimate the household and employment growth of Toms River Township. The flat growth rate and the NJTPA projections are similar. It should be noted that the average household growth rate did not take into account the population growth. Should the population decline in accordance with the Survival Method model, the number of households could decline. Employment trends may not be as impacted by the population growth, due to the fact that the 2000 employment numbers and the 2010 employment numbers were similar despite a population growth. This is attributed to the fact that the unemployment rate in 2000 was lower than in 2010.

<table>
<thead>
<tr>
<th>Housing Projections</th>
<th>2010 (Units)</th>
<th>2030 (Units)</th>
<th>2010-2030 (units)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtown Regional Center</td>
<td>4142</td>
<td>4847</td>
<td>705</td>
</tr>
<tr>
<td>Ortley Beach Center</td>
<td>2658</td>
<td>2686</td>
<td>28</td>
</tr>
<tr>
<td>North Beach Center</td>
<td>4127</td>
<td>4127</td>
<td>0</td>
</tr>
<tr>
<td>Industrial Center</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Route 9 Highway Core</td>
<td>1112</td>
<td>2363</td>
<td>1251</td>
</tr>
<tr>
<td>Route 70 Highway Core</td>
<td>780</td>
<td>909</td>
<td>129</td>
</tr>
<tr>
<td>Route 37 East Highway Core</td>
<td>26</td>
<td>26</td>
<td>0</td>
</tr>
<tr>
<td>Route 37 West Highway Core</td>
<td>47</td>
<td>134</td>
<td>87</td>
</tr>
<tr>
<td>Fischer Boulevard</td>
<td>262</td>
<td>262</td>
<td>0</td>
</tr>
<tr>
<td>Hooper Avenue</td>
<td>732</td>
<td>872</td>
<td>140</td>
</tr>
<tr>
<td>Balance of Township</td>
<td>29448</td>
<td>29528</td>
<td>80</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>43334</td>
<td>45754</td>
<td>2420</td>
</tr>
</tbody>
</table>

Source: Toms River Township staff utilizing development approvals, aerials, and 2010 Census data, and proposed developments
Note: 2030 unit count includes units currently under construction

It is anticipated that 3,388 new households will have to be accommodated for the year 2020 and a total of 7,105 new households in 2030 utilizing a straight line projection. The Township has projected a total of 2,420 housing units will be constructed by the year 2030. It should be noted that the projection does not include any housing potential for the Ciba Geigy Site or the Route 37 (Coates Pointe) redevelopment sites which are anticipated to produce some housing unit developments. It is unknown how many housing units will be developed at both of these locations. It should also be a noted that
the anticipated housing unit potential for 2030 includes large sites under construction, with site plan approval, or in the concept stage. Infill development and housing units created through small lot subdivisions were not calculated in the projection count. Therefore the projected number should be considered a conservative number. A total of 4,685 households will have to be absorbed by other communities.

EXISTING LAND USES

Figure 1: Preliminary Existing Land Use Map: Source MODIV Data
The Township is predominantly built out, mostly with single family dwellings. The former Ciba Geigy property has the most vacant land available in the Township. The Township has 6 commercial corridors located on the mainland: Route 37 West, Route 37 East, Fischer Boulevard, Hooper Avenue, Route 70 and Route 9. The active industrial zone is located on Route 37 adjacent to the Manchester Border and former Ciba Geigy property. Preserved land is mostly located adjacent to the Barnegat Bay, the Toms River, and Ocean County College.

Economic Trends in Toms River Township
The citizens of Toms River are employed by a variety of different industries. The educational, health and social service industries employ the largest percentage of Toms River Township residents, followed by the retail trade industry. The Saint Barnabas Healthcare System and Toms River Regional School District, both centered in Toms River Township, are respectively the largest and fourth largest employers in Ocean County. Additionally, the businesses along Route 37 and on Hooper Avenue may account for the large percentage of Toms River residents employed in retail trade.

Table 8 depicts all of the industries that employ Toms River Township residents as compiled in the 2010 Census and as previously shown in the 2006 Master Plan based on the 2000 Census.

<table>
<thead>
<tr>
<th>Industry (2010)</th>
<th>New Jersey</th>
<th>Ocean County</th>
<th>Toms River</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>4,235,089</td>
<td>242,930</td>
<td>44,217</td>
</tr>
<tr>
<td>Agriculture, forestry, fishing and hunting, and mining</td>
<td>13,701</td>
<td>852</td>
<td>49</td>
</tr>
<tr>
<td>Construction</td>
<td>235,821</td>
<td>19373</td>
<td>3770</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>366,432</td>
<td>13144</td>
<td>2198</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>145,450</td>
<td>7068</td>
<td>1360</td>
</tr>
<tr>
<td>Retail trade</td>
<td>474,440</td>
<td>32766</td>
<td>6723</td>
</tr>
<tr>
<td>Transportation and warehousing, and utilities</td>
<td>242,152</td>
<td>13760</td>
<td>1796</td>
</tr>
<tr>
<td>Information</td>
<td>121,100</td>
<td>6179</td>
<td>1208</td>
</tr>
<tr>
<td>Finance, insurance, real estate and rental and leasing</td>
<td>365,487</td>
<td>15969</td>
<td>2624</td>
</tr>
<tr>
<td>Professional, scientific, management, administrative, and waste management services</td>
<td>540,734</td>
<td>23777</td>
<td>3999</td>
</tr>
<tr>
<td>Educational, health and social services</td>
<td>1,002,887</td>
<td>63402</td>
<td>11877</td>
</tr>
<tr>
<td>Arts, entertainment, recreation, accommodation and food services</td>
<td>350,495</td>
<td>20364</td>
<td>3701</td>
</tr>
<tr>
<td>Other services (except public administration)</td>
<td>190,576</td>
<td>12261</td>
<td>2399</td>
</tr>
<tr>
<td>Public administration</td>
<td>185,804</td>
<td>14025</td>
<td>2513</td>
</tr>
</tbody>
</table>

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A comparison of the two time periods shows that the Township added 2,671 jobs between 2000 and 2010, despite the "Great Recession" that bottomed out in 2008. While there were declines in manufacturing, agriculture, and several other categories, the big gains were made during that 10 year period in the educational, health and social services category and the other services category.
Toms River’s leading economic industry group is educational services, health care and social services with approximately 27% of the jobs being classified under this category. Toms River Township is home to Ocean County College, Kean at Ocean County College, the Toms River Regional School System, Community Medical Hospital, HealthSouth Garden State Rehabilitation Hospital, Shoreline Behavior Health, Children’s Specialized Hospital, and the Ocean County Government complex. The Ocean County Government Complex includes the Ocean County Board of Social Services, Ocean County Health Services and other social assistance programs. Toms River Township is home to Sunrise Detox, New Hope Crossroads Addiction Center, and Ocean Medical Services. Toms River Township has a higher percentage of educational services, health care and social services compared to Ocean County and New Jersey. However, this industry is still the leading industry for Ocean County and New Jersey.

Toms River’s second leading industry is retail trade with approximately 15% of the jobs being classified in this sector. This industry tends to have low paying wages. The Township is home to the Ocean County Mall, Seacourt Pavilion, and many other shopping centers. Toms River has a higher percentage of jobs that are in the retail trade industry compared to Ocean County and New Jersey.

**Income**

Toms River Township has a median household income of $72,939 which is much higher than Ocean County’s median household income of $61,839 and in line with New Jersey’s median Household income of $72,062. The Township’s per capita Income of $35,759 is slightly less than New Jersey’s per capita income of $36,359 and higher than Ocean County’s per capita income of $30,951. Toms River Township’s Poverty Rate of 26.8% is slightly less than Ocean County’s poverty rate of 27.4% and lower than New Jersey’s poverty rate of 30.4% according to the 2010-2014 American Community Survey 5-year Estimates. Toms River Township’s unemployment rate of 5.6% is lower.

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1 Source: Profile of General Population and Housing Characteristics: 2010 Census Summary File 1 (Toms River Township, Ocean County & New Jersey), American Fact Finder

Selected Economic Characteristics 2010-2014 American Community Survey 5-year Estimates (Toms River, Ocean & New Jersey), American Fact Finder

Poverty Status In the Past 12 Months, 2010-2014 American Community Survey 5-year Estimates (Toms River, Ocean & New Jersey), American Fact Finder
than Ocean County’s rate of 5.9% and New Jersey’s rate of 6.4% according to the 2010-2014 American Community Survey 5-year Estimates.

Commuting To Work

Toms River Township has a higher commuting by vehicle alone rate than New Jersey and slightly higher than Ocean County’s rate. Approximately 84% of Toms River Township’s 42,999 commuters travel alone by car, truck, and van. Slightly more than 7% car pool to work which is slightly less than New Jersey’s rate and approximately 2% utilize public transportation. The public transportation rate is much lower than New Jersey’s rate of 10.9%, however this could be due to the fact that Toms River Township has limited public transportation options.

![Commuting to Work](chart.png)

Source: Selected Economic Characteristics 2010-2014 American Community 5-year Survey

Educational Attainment

Toms River Township’s populations aged 25 years or older have earned more Bachelor’s degrees than Ocean County’s population, but less than the State of New Jersey’s equivalent population. Only 9% of Toms River Township eligible residents have attained less than a high school degree, which is lower than Ocean County and New Jersey. Toms River and Ocean County populations have more residents with some college, associate’s degree than New Jersey. This can be attributed to the fact that Ocean County College is located in Toms River Township. In addition, Ocean County and Toms River Township’s leading employment sectors (particularly health) in most cases only require associates degrees. It should be noted that Ocean County College has partnered with Kean University to provide a four year bachelor’s degree. It is anticipated that the percentage of residents with bachelor’s degrees will increase.

EP-11
Key Findings:
A Summary of Strengths and Weaknesses

The already populous Toms River Township is growing and will continue to expand steadily over the next 25 years. The North Jersey Transportation Authority projects a population of 112,720 by the year 2030. North Dover still has vacant land but new residential developments are already proposed and approved in that section of the municipality.

The population increase will present a variety of challenges and benefits for the Township. Increased residents in Toms River will put a strain on existing infrastructure and community facilities. However, the need for improved and expanded facilities will also create new jobs for incoming residents. Additionally, the increased population will provide increased patronage to local businesses.

One of the largest age groups in Toms River Township is senior citizens aged 55 and older. This age group made up over a quarter of the population at the time of the 2000 census. With a number of age-restricted communities recommended in the Township’s Housing Element and Fair Share Plan, and permitted under current zoning, it is anticipated that the senior population in Toms River will continue to grow. A large senior population presents the need for a myriad of healthcare and transportation services. Traditionally, many retired seniors have not worked, but the increased cost of living in New Jersey is causing many seniors to come out of retirement and head back to work, either part-time or full-time, adding to the size of the labor force. Those seniors who have financially stable retirement funds can have a positive impact on the economy by patronizing local businesses and volunteering their time to local organizations.
As its population has grown, Toms River Township has become more diverse. In particular, the Township has seen a substantial increase in the Hispanic population reflecting trends throughout the county and the state. While 54.7% of this population speaks English very well according to the US Census, 5.3% do not speak English at all. Therefore, there are a number of challenges brought to the community including the need for Spanish-speaking personnel in emergency services. Additionally, the labor force will grow and become more diverse, and the township's retail industry can also be expected to respond as a business community to meet the cultural needs of the Hispanic segment of the population.

The educational attainment of Toms River Township residents has been on the increase. The majority of the population aged 25 and older has received the equivalent of a high school education or higher. Improvements in educational attainment in recent years should serve as an attraction to major employers, especially those offering professional and managerial positions. Since over 40 percent of the County labor force works outside the County, efforts should continue to be made to increase employment opportunities in the northern part of the County where the population is concentrated. This has the added benefit of reducing reliance on the already overcrowded regional road system as a means of getting to work, as evidences by the fact that approximately 84% of Toms River Township's 42,999 commuters travel alone by car, truck, and van.

The majority of housing in Toms River was constructed prior to 1980. However, the total number of new housing units in the municipality has been increasing at a faster rate than the county and the state. The United States Census reported that approximately 16 percent of the housing units in Toms River were constructed during the decade between 1990 and 2000, while those numbers in the state and county were 10.5 percent and 15.9 percent respectively. Housing in Toms River is mostly single-family and owner-occupied.

Additionally, the percent of vacant housing units in the township substantially decreased from 1990 to 2000 from approximately 9% of the total housing units in 1990 to approximately 7% of the total housing units in 2000. Vacancy rates for the housing stock in the Township are higher than one would generally associate with a community made up primarily of single family dwellings. A certain number of vacant units is needed in order to allow for turnover and provide opportunities for new families to move into the community. The normal vacancy rate for sales housing is between one and two percent while the rental housing market generally functions most effectively with a vacancy rate of four to five percent. The higher vacancy rate in the Township, however, may not signal anything more than the fact that there are year-round (i.e. heated) housing units that are not occupied by permanent residents at the time of the Census. A smaller impact is likely from the completed but unsold segment of the new housing market. The expanding housing stock can be considered an indicator of strength for Toms River's economy. Owner-occupied units are characterized by lower turnover in occupancy, while the construction of new and rehabilitation of older homes will fuel the already expanding construction industry.
Both the county and the municipality have experienced a surge in management and service occupation, while sales occupations have also remained strong. Farming and production occupations have remained low or declined. These facts further illustrate the need for additional white-collar jobs within the Township of Toms River.

The Township's community facilities, natural and recreational resources are key strengths of the municipality. The Saint Barnabas Community Health Center located near Downtown Toms River is a major hospital. Its continued expansion reflects the growing needs of the region's aging population and serves the regional population as well. The hospital will continue to provide jobs for the area's professionals. The low crime rate combined with a high quality regional school district will continue to attract families to the area as well. The ample natural resources are inviting and close enough to attract tourists from New York and Pennsylvania, while remaining a weekend resort for many New Jersey residents. The popular parks, including Winding River Park and Cattus Island Park, attract many local residents as well as those of neighboring municipalities. Although a number of museums already exist in downtown Toms River and the Ocean County performing arts center has a good reputation, the township's cultural resources have become substantially expanded with the completion of the Jay and Linda Grunin Center for the Arts at Ocean County College that has attracted local as well as nationally renowned artists. The Township is also home to the Pine Belt Arena that was constructed in 2003 and at one point was utilized for both local and nationally renowned artists. The Pine Belt Arena is currently underutilized as a arts and cultural venue, due to the limited events hosted at the arena. Efforts should be made to encourage the scheduling of more events. The Cultural Arts Element of this 2017 Master Plan expands on the many other cultural initiatives that have taken place since the last (2006) Master Plan.

A major weakness in the Township's economy is the public transportation system. Although there is regional bus service that transports riders to and from Toms River, there is limited local transportation for residents within the municipality. Improved local public transportation, including paratransit (jitneys and shuttles) would greatly enhance to local economy, as it would provide residents without private automobiles especially seniors to be more mobile and contributing to the local economy.
Recommendations for Sustainability & Resiliency

The five objectives and four recommendations for sustainable/resilient economic development in the 2006 Master Plan discussed above remain valid. Given the changes in assumptions and the planning studies completed since 2006, the following new objectives and recommendations are suggested to enhance community economic resiliency and sustainability:

1. Implement recommendations and conduct recommended studies provided in the Route 37 Economic Corridor Vision Plan related to sustainability/resiliency, stated as the following:
   - Inventory existing commercial and office space;
   - Develop a Sustainable Corridor with green tech, infrastructure, and Industry employers;
   - Explore "greyfield" redevelopment for repurposed mixed use properties;
   - Explore market interest in green technologies campus;
   - Develop an eco-tourism and "gateway" to Pinelands and the Shore Plan;
   - Provide more workforce housing;
   - Create diversity of housing types;
   - Study feasibility of changes to age-restrictions in vacant age-restricted housing;
   - Study greenway connecting Barnegat Branch Trail to Rte. 37, Downtown, and riverfront;
   - Study multimodal road/trail along rail right of way into Downtown;
   - Develop Ocean County College specialized training for health, green industry, and tech;
   - Conduct detailed market analysis for potential users of the CIBA/BASF site;
   - Create a Redevelopment Plan for the property; and
   - Explore a portion of the CIBA/BASF site for wildlife refuge.

2. Perform a similar visioning process as the Route 37 Economic Corridor Vision Plan for the other corridors that are proposed for core designation in the Smart Growth Plan. Including Route 70, Route 9, Fischer Boulevard, and Hooper Avenue to further diversify the local economy and promote anti-sprawl, infill development.

3. Implement economic development strategies relevant to economic sustainability in Toms River included in Ocean County’s 2011 Comprehensive Plan, including:
   - Further diversify the education opportunities at high schools, vocational technical schools and colleges, provide more job training and Incorporation of more four-year degree options.
   - Green technology facilities should be located along highway corridors or within one of the existing industrial parks, such as the one located off of Route 37 in Toms River to provide services such as manufacturing and supplying products used to treat deteriorated ecosystems, solar panels, wind turbines, building materials and other new technologies.
   - A portion of the Route 37 corridor in Toms River should be considered as a “federal technology corridor” due to its close proximity to the Lakehurst Annex of the Joint Medium Base. Specifically, the Ciba-Geigy property, a 1,200 acre property, should be considered to be reused and repurposed as a site for a Federal Technology Corridor.
   - Implement the Ocean County Barneget Branch Trail, which will eventually extend from downtown Toms River to the historic town of Barneget, promoting connections between recreation and commercial centers.
   - Toms River and South Toms River should form a partnership to redevelop and promote the waterfront area with business and recreational uses that enhance the area as a regional attraction.

4. Capitalize on the growth of green and sustainable industries such as green energy technology, eco-tourism, health care, and food production and processing, and develop these within the Township.

5. Prioritize the redevelopment of the Ciba-Geigy site as a mixed-use economic center.

6. Make the provision of workforce and affordable housing in mixed-used areas near growing employment centers, such as the Route 37 corridor, a priority.

7. Work with Ocean County to preserve remaining farmland in the Township to continue this industry and support connections between local food production and food consumption, especially those properties targeted for preservation within the County Agricultural Development Area (food production and processing has been identified by the State as a potential growth sector).

8. Institute a Buy Local Program to incentivize shopping locally and a Green Business Recognition Program to highlight the efforts of businesses that use sustainable sourcing, purchasing, recycling, or other sustainable practices (both programs are action items eligible for Sustainable Jersey points). Brick Township’s Buy Local program serves as an example that Toms River could emulate and adjust to its own needs.

9. Study the potential for developing a micro-grid system that can service downtown Toms River with power in the event of a long-term outage to avoid economic losses (see the Energy Conservation Element, Section C for a description of the micro-grid system).
Other Recommendations and Strategies:

The following recommendations and strategies from the 2006 Master Plan remain valid and are restated/updated as follows:

Revitalize existing local businesses.

1. Establish a Downtown façade grant program designed to help smaller businesses with façade and sign improvements. The Downtown Business Improvement District (BID) can implement such a program.

2. Create additional Special/Business Improvement Districts (SID/BID). Additional Improvement districts should be considered in areas along Route 37 to rehabilitate existing businesses and upgrade areas through coordinated improvements.

3. Enforce property maintenance standards. There are a number of rundown commercial properties throughout the Township that have either been abandoned or are just poorly maintained. There sites become an eyesore to the community and neighboring businesses as well. The Township should consider hiring additional code enforcement officials to better enforce property maintenance standards. A pending ordinance strengthening the ordinance regarding “Continued Certificate of Occupancy” (CCO) should help to increase the level of inspections within the Township.

Maintain and attract job-generating businesses

1. Implement a mercantile license policy. A mercantile license is a good way to keep track of local businesses. It can help eliminate illegal businesses and construction without permits. Such a license would require every new or relocating business to fill out a brief form that would include general details about the business. A nominal fee could also be charged. In addition to helping learn more about new businesses developing in the Township, a mercantile license can be utilized to create a database of businesses for members of the public and businesses to utilize.

2. Capitalize on existing economic clusters. An economic cluster is a group of related industries located within proximity to each other that require similar training, supplies, and financing. Such economic clusters generally have regional connections though service functions and support are locally centered in the cluster. The following economic clusters exist in the Township of Toms River and capitalizing on them will help sustain the existing businesses and attract jobs to the municipality.

Healthcare and medical services are represented by the Saint Barnabas Community Medical Center and a variety of medical-related businesses in the surrounding area that support the hospital.

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Higher education facilities include Ocean County College and Ocean County Vocational Post Secondary School.

Cultural, entertainment and tourist attractions in Toms River are grouped in a number of areas including Downtown Toms River, Pine Belt Arena, and the barrier island.

Government and private office support are also centered in Downtown Toms River.

Route 37 is an existing retail corridor.

3. **Encourage new nodes and centers.** The Township should identify new areas for mixed use centers that include a variety of commercial uses that incorporate or are in close proximity to residential uses.

4. **Promote the establishment of additional restaurants.** One complaint that was continually expressed during the Townships visioning process was the overcrowding of existing restaurants. Long waits for good food has become expected at local restaurants and has even deterred residents from patronizing local dining establishments to either stay at home or seek more distant restaurants with lesser waits. There is clearly a need for additional restaurants.

5. **Promote commercial development along Route 37, Route 9 and Hooper Avenue Corridors.** Develop gateways to these areas and improved traffic flow and transportation.

6. **Provide jobs/activities for large senior and professional populations.** Toms River Township has a substantial number of senior and professional residents. Therefore, a variety of jobs that these populations can support should be developed within the Township to encourage the residents who live in Toms River to also work in Toms River.

7. **Plan for future development in the Township’s existing and proposed industrial parks.** The Township should support the expansion of the existing Toms River Industrial Park along Route 37 and the eventual redevelopment of the Ciba Geigy property.

**Support the growth of the health service industry while protecting viable residential neighborhoods.**

1. **Promote the maintenance and expansion of the existing Robert Wood Johnson Barnabas HealthHealthcare Facility.** Future improvements and growth of the medical center and surrounding support businesses should be coordinated with the Township and local residents to ensure a balance between the expanding medical facilities and the residential neighborhoods surrounding the hospital.
2. Encourage "spin-off" industries and services located within proximity of the medical center. The healthcare center provides invaluable services and jobs to the Toms River population. Likewise it attracts smaller businesses and services needed for support of the hospital like medical equipment suppliers, pharmacists, testing labs, medical offices and medical educational facilities. Areas within proximity of the hospital should be dedicated for such uses. However, such businesses should not interfere with established residential neighborhoods. Additional areas throughout the Township should also be considered for such uses. The development of a medical support center in a less intruding section of the municipality would still provide nearby services while preserving existing residences. Once additional medical centers are established, shuttle services between different healthcare centers throughout the Township should be considered.

Utilize the abundant natural resources to enhance the local economy

1. Improve access to beaches and other waterfront areas. Better public accessibility to Toms River’s water resources will promote tourism. Adequate parking is also a key element in providing better access to the waterfront areas.

2. Develop biking and walking trails and greenways throughout the Township. Greenways provide excellent opportunities for linking communities to the municipality’s resources and amenities. Improving pedestrian and bike trails to connect the Township’s park system with existing neighborhoods and the downtown will aid the overall economy.

Capitalize on Downtown Toms River’s location and designation as the County seat to become a regional center.

1. Expand the downtown historic and waterfront districts as a tourist and entertainment destination. This footprint for tourism, entertainment, culture and recreational facilities already exists in Downtown Toms River. The Cultural Arts Element and Historic Preservation Element, as well as the Land Use Plan Element all encourage the development of cultural heritage tourism as a strategy to brand Downtown Toms River as a destination for visitors.

2. Rezone areas in the downtown in accordance with the Downtown Toms River Vision Plan and Master Plan. The proposed Waterfront Redevelopment District promotes multi-tenant shopping centers, multifamily residential developments and ground floor commercial uses in the downtown waterfront district. The draft Waterfront Redevelopment Area Phase 1 Redevelopment Plan should be updated with the findings of the Downtown Waterfront Neighborhood Circulation Plan and adopted so that redevelopment of key parcels can be promoted. The Washington Street Overlay District would preserve the existing setbacks and land densities while promoting landscaping and restaurants in order to maintain the existing historic nature of Downtown Washington Street.
3. **Provide adequate parking in the downtown area.** Sufficient parking in the downtown area is vital to attract new merchants, shoppers and visitors and to maintain the existing viable businesses in the area.

**Make use of the Township's Educational services**

1. **Toms River Regional School District.** As the fourth largest employer in the county, the school district already fuels the Township's economy. With the history of expanding school enrollments, it will be important to continue to provide quality education with sufficient resources and facilities to Toms River students. The maintained reputation of the Toms River School District is a strong link to the economy as it creates both jobs and educational services.

2. **Continue coordination with Ocean County College to provide services and jobs to Toms River Township residents.** Ocean County College provides a range of services to the municipality. In addition to the educational services provided, the College's performing arts center provides entertainment for the general public. Additionally, the school works in cooperation with Ocean County and the Toms River Regional School District to offer a variety of summer programs for area youths.

**Invest in the existing neighborhoods throughout Toms River**

1. **Examine the vitality and health of existing neighborhoods.** An assessment of the existing Toms River neighborhoods can be utilized to categorize neighborhoods into those in need of preservation, redevelopment, stabilization and reinvestment. Once the neighborhoods have been categorized, they can be targeted for upgrades and improvements such as recreational amenities and be more thoroughly monitored for property maintenance violations. Neighborhoods with vacant and underutilized housing can be considered for new uses such as mixed-use centers.

2. **Enhance and preserve historic neighborhoods.** Well-maintained historic houses in connection with strong community associations and thriving shopping districts offer a high quality of life for residents and are a major source of retaining and attracting residents to Toms River.

**Improve and expand public transportation services**

1. **Develop better highway access.** Additional ingress and egress from the Garden State Parkway will help improve the local economy.

2. **Improve local public transportation.** Public transportation on the local level in Toms River Township is virtually non-existent. The need for public transportation is apparent. Although the local senior center provides limited transportation for its members, the center noted that lack of transportation for the senior residents as their biggest obstacle. There are simply not enough drivers or busses to transport all of the seniors to places they need to be. Therefore, the senior
center has been forced to prioritize those seniors who have greater needs for transportation and the center is able to provide transportation only for those in need of medical services who have reserved weeks in advance. Improved public transportation is essential for the safety and continued involvement of seniors in the community. Options, including shuttles and jitneys should continue to be developed for all residents in order to diminish reliance on the automobile. The Waterfront Redevelopment District's redevelopment plans should promote the use of the Toms River Bus Depot and options for redeveloping the existing parking area at the Bus Station into a Transit Oriented Development (TOD) through the consolidation of parking into a deck and the introduction of multifamily residential development with pedestrian and bicycle connections to the rest of the Downtown.

3. Collaborate with State and County agencies to expand commercial vehicle transportation options. This could entail improving access to existing highways, permitting commercial vehicle utilization of the Garden State Parkway to NJ Turnpike access, and utilization of existing rail lines for freight rail.

Advance Redevelopment Area Designations and Redevelopment Plans

1. Finalize, update and adopt redevelopment plan for Downtown Waterfront Redevelopment Area, inclusive of a Transit-Oriented Development at the Toms River Bus Depot as part of a Transit Village Designation from the NJDOT.

2. Develop a redevelopment plan for the Coates Pointe Redevelopment Area using Coates Pointe Vision Plan, prepared by the Edward J. Bloustein School of Planning and Public Policy as a reference.

3. Advance redevelopment process for Ciba Geigy Redevelopment Area once current tax appeal litigation is settled.

4. Pursue rehabilitation area designation and redevelopment plan development for portions of Downtown not included in Waterfront Redevelopment Area to enable customized design standards and potential five-year property tax incentives to encourage investment in rehabilitation of buildings.

5. Investigate additional rehabilitation or redevelopment area designations in association with economic development initiatives within the highway corridors in the Township.

Investigate Eligibility for Community Economic Development Strategy (CEDS)

1. Investigate eligibility for funding to prepare a CEDS specific to Toms River Township in alignment with the Together North Jersey (TNJ) Regional CEDS that included Ocean County.
Implement Toms River-Lakehurst Route 37 Economic Corridor Vision Plan

1. Continue to implement recommendations for economic development along the Route 37 corridor within Toms River (see Appendix A: Economic Development - Route 37 Economic Corridor Vision Plan).

2. Investigate an interlocal service agreement with Manchester Township to extend the Route 37 Core and Route 70 Core in the Township’s Plan Endorsement Petition through Manchester to the Lakehurst Circle.

Implement Recommendations for Cultural-Heritage Tourism described in the Historic Preservation and Cultural Arts Plan Elements of the Master Plan.

1. Nurture grass roots organizations and public sector initiatives to develop arts and cultural opportunities and events in coordination with the promotion of Downtown Toms River’s historic resources.

2. Use cultural and heritage tourism as a vehicle for encouraging lodging, travel and restaurant services in the Downtown, with linkages to similar redevelopment initiatives in South Toms River and the Ortley Beach section of the Township on the barrier island.
APPENDIX A

Toms River-Lakehurst Route 37 Economic Corridor Vision Plan:
"Economic Development: Mixed Use, Greyfield & Retail Repurposing"
ECONOMIC DEVELOPMENT:

MIXED USE, GREYFIELD & RETAIL REPURPOSING

CORRIDOR ECONOMIC DEVELOPMENT COMMITTEE
A key first step to advancing development is establishing a corridor economic development committee (EDC) to address the current gap in economic development leadership in the Route 37 Study Area. This overarching organization could build off of the Rt. 37 Steering Committee and would ensure stewardship of this plan, as well as consistency and accountability.

Additionally, as the study area traverses multiple jurisdictions, coordination at a higher, regional level is needed. An EDC would also serve to bring together representatives of various groups, including those interested in workforce development as well as local business and industry leaders.

MARKET ANALYSIS
A market analysis will provide information for the best use for repurposed buildings. The Study Area currently faces a leakage of retail sales, which suggests that existing residents are leaving the area to purchase retail goods and services elsewhere. Specifically within the Route 37 Study Area, 19 percent of household demand for retail goods and services is purchased outside of the study area.

While this leakage suggests a need for additional goods and services in the study area, the evolving retail landscape and the lingering effects of the recession and Hurricane Sandy may make new development tenuous. For the greatest chance of success, further study is needed to properly target which goods and services are most needed.

ZONING FOR MIXED-USE
Zoning in the study area generally does not typically accommodate mixed use development, as many zoning codes were crafted in a time when land-use separation was convention. Mixed-use development can help address problems related to sprawl and automobile dependency, as people can live closer (generally within walking distance) to the goods and services they need on a regular basis. Due to these benefits associated with mixed

Outdoor dining in a new mixed use project in Princeton, NJ

The local communities should explore zoning policies with an eye towards expanding mixed-use and multi-family residential opportunities to create active places both in downtown areas and in highway corridor redevelopment/repurposing. This example is of a mixed-use project in a suburban highway corridor outside of Atlanta.
use zoning, local and county planning officials should rethink current zoning policies with an eye towards fostering mixed-use, multi-family residential, and small-service retail.

**REPURPOSE OBSOLETE PROPERTIES FOR MIXED USE**

There are now, and will be well into the future, a number of strip and community shopping center properties within the study area which will only be economically viable as mixed-use development properties. In order to avoid the large-scale blighting influences that empty or half-empty retail centers can become for communities, local municipalities should begin thinking about how these existing greyfields (including underperforming or closed large-format retail centers) should be redeveloped.

Municipal planning departments should inventory retail centers that are likely to become economically obsolescent over the next five years in order to be ahead of the curve. There are a number of retail stores observed to be physically and/or economically obsolescent, or not developed to their full potential, presenting opportunities for redevelopment along the corridor.

Older centers with vacant anchors and in-line shops are likely in need of major renovations in order to remain competitive in today's retail environment. Much of the commercial retail strip along Route 37 exists as a blight on the corridor.

**DOWNTOWN TOMS RIVER SUPPORT**

A redevelopment study has already been completed and incorporated into Toms River Township's Master Plan. There should be continued support for this plan and the efforts of Downtown Toms River BID to program. Toms River should take advantage of the work that has already been done, and continue with steps to revitalize downtown.

There is some additional housing being developed in the Downtown area and this should be supplemented to help activate the core area. Arts, cultural, and dining options, including nights and weekends, can help to capture Ocean County customers who otherwise drive to locations in Monmouth County for those draws.

Toms River Township is in the process of retaining a consulting firm to develop a Neighborhood Circulation Plan for the Downtown Toms River Redevelopment Area. The study will take 6 months to complete and is being funded by Post Sandy Planning Grants provided by the Department of Community Affairs. Outcomes from the study will further develop the draft redevelopment plan that has been proposed by the Toms River Business Improvement District.

- Create a standing Corridor Economic Development Committee
- Reexamine zoning for mixed-use and small-service retail
- Encourage the upgrade/repurpose obsolete commercial properties for mixed use development
- Conduct market analysis for Downtown and Corridor

*Older centers with vacant spaces can use some renovations and quality architectural and landscape updates to remain competitive in today's retail environment.*
ECONOMIC DEVELOPMENT:

JOINT BASE SUPPORT, TECHNOLOGY & GREEN INDUSTRY

JOINT BASE ADVOCACY
The Joint Base is a primary economic driver in the area, offering job security and high wages. As mentioned in Section 1 of this report, however, the Joint Base is vulnerable to being closed in 2017 through BRAC. The Joint Base provides many economic benefits; for example, it is the second largest employer in the state and it creates opportunity for additional economic development. The Joint Base should be leveraged for additional economic development, and be valued and protected as an asset.

The presentation, “New Jersey Military Base Enhancement Coalitions Joint Base McGuire-Dix-Lakehurst and Picatinny Arsenal: Leveraging Federal Employment for Economic Development, Revenue and Job Growth for New Jersey,” highlights that military bases in New Jersey are both an economic development opportunity and challenge. The report recommends support of the following military economic development goals:

- Diversity, educate and anchor all missions
- Bring tri-service, high-value missions to New Jersey bases with associated contractor support within the state
- Educate high school and college students with tools to support federal defense infrastructure

Recommended studies include:
- Joint Base Air Space Study
- Mission Risk Analysis (update monthly)
- Mission Opportunity Analysis (update monthly)
- Economic Impact Analysis for Each Mission Opportunity

TECH HUB FOR JOINT BASE
Due to the proximity of the Joint Base and relationship with NAVAIR, the Study Area is a good location for a manufacturing hub that could capitalize on synergies that result when businesses are clustered. Manufacturing jobs are coming into greater demand, especially as the aging manufacturing workforce creates a need for replacement workers.

The NAVAIR facility is a world leader in aircraft launch, recovery, and support equipment. Creating a corridor or a campus that can develop and provide strategic services will help to grow the overall mission of the base and protect it from BRAC.

A Tech Hub with some key R&D facilities could support mission expansion which might include...
tri-service mobilization and deployment, joint technology for aviation ground support equipment, expeditionary airfield technology, and tri-service unmanned vehicle technology.

"GREEN TECH" CAMPUS
The Ocean County Master Plan recognizes that alternative or green energy is one of the fastest growing industries in the economy, and the county wants to work with partners to advance development of green technology clean energy. Potential partners include NUI, Rutgers, Stevens Institute of Technology, Ocean County College, Kean University, and New Jersey Natural Gas.

Areas of focus with potential for new green technology facilities and businesses include locations such as highway corridors like Route 37, existing industrial parks like the Lakewood Industrial Park or Toms River Corporate Park, the Ciba-Geigy site, the Ocean County College Campus, or the Joint Base.

Funding is potentially available through the Regional Economic Development Initiative (REDI), a statewide job development strategy that focuses on green occupations. Ocean County has pursued REDI grant funding for career training, education, and networking and contact services. Also, the county could look to federal government support, which has created grants to assist states, local governments, and the private sector to develop green technology and infrastructure.

There needs to be further study of the feasibility and market for this industry. The study should identify all the needs of this industry and focus areas within the green industry and R&D. Local municipalities can utilize that study to ensure that proper zoning is in place for a successful green technology campus.

CLEAN ENERGY & GREEN INFRASTRUCTURE
According to the Ocean County Master Plan, Ocean County was the first county in New Jersey to create an Energy Master Plan for its facilities. As sites are repurposed, there is opportunity to incorporate clean energy systems and green infrastructure.

As a region that suffered the devastating effects of Hurricane Sandy, resiliency should be a cornerstone in the thinking of the infrastructure regardless of the development type or use. The incorporation of clean energy systems will benefit the community from an environmental standpoint, as well as provide job opportunities for those working in green technology.

Funding may be available from the New Jersey Economic Development Authority (EDA) Clean Energy Solutions (CES) program. This program provides low interest funding for businesses to incorporate clean and renewable energy solutions, manufacture clean energy products, or implement new green technology through workshops offered by the One-Stop System and at the Business Resource Center in Toms River. Additionally, the New Jersey Clean Energy Program (NJCEP) provides financial incentives, programs, and services which may benefit local municipalities and businesses.

- Advocate for Joint Base & supportive industry
- Create a Ciba-Geigy/BASF Redevelopment Plan
- Explore options for the reactivation of rail spur
- Encourage the development a "Green Tech" campus with focus on Clean Energy and Sustainable Technology
- Explore manufacturing hub to service and support Joint Base, NAVAIR
- Incorporate Clean Energy components to repurposed sites
**ECONOMIC DEVELOPMENT OPPORTUNITY SITE: CIBA-GEIGY/BASF**

**CIBA/BASF REDEVELOPMENT PLAN**

The Ciba-Geigy site is a major opportunity for redevelopment. Redeveloping the 70-acre site could provide an opportunity to bring additional jobs and property tax revenue into the area, increase access and service at sites like Ciba-Geigy, and allow for the transportation of materials to and from the Joint Base and the Lakewood Industrial Park. A warehouse and manufacturing space nearby would also allow startup and relocating companies to save costs and time on goods shipment.

Ongoing remediation is taking place in areas that have contamination. Redevelopment could occur by separating out remediated areas, contamination areas, and clean areas that could qualify to be park land.

A number of uses for the site have been suggested in various plans and focus groups. Some potential uses for the site include a satellite college campus, a site for light manufacturing, a mixed-use, mixed-generation, and mixed-income complex with a "downtown feel," a potential site for a sports team or outlet shopping, a walkable transit village that connects to downtown and parks, a spa and fitness center, or a site for green technology and manufacturing. These concepts would need a real estate analysis for feasibility.

**Resolve tax appeal situation**

BASF is currently in an appeal with Terra River Township on their taxes for the CIBA property. The dispute has caused advancing any redevelopment efforts on the property to be at a standstill.

**Removal of Super Fund designation**

The Super Fund designation of the property has had a substantial impact on its perception in the region and in the marketplace. One of the key ways of improving the marketing of the property is to have the designation removed. There is a process for partial delisting if some portion of the property meets the requirements for delisting with the USEPA.

The Cell 1 area is under the purview of NJDEP, not USEPA's Superfund program, and has always been a regulated landfill permitted under state regulations. Cell 1 has been subdivided out and the remainder of the property has development potential, some with restrictions and some without. The land developer has to take initiative to get any portion delisted, so once the tax appeal is resolved, BASF should work with the Township's support to formally apply to get the delisting.
Market analysis for potential users

A more detailed market analysis should be conducted to provide information as to the best set of uses for the CIBA site in the current market. The primary objective is to gain a very detailed understanding of local supply, demand, occupancy and pricing factors for a broad range of land uses within the primary market area, specifically for the CIBA site.

The study should examine competitive supply within the primary market area (existing and proposed) for a range of potential land uses and identify prospective opportunities and challenges for each of those uses on the property.

Quantitative analysis should also be supplemented with active broker interviews, in order to “ground truth” data findings.

Explore reactivation of rail spur to CIBA

The Toms River Branch is an at-risk ROW and has been out of service (not haul traffic) for two or more years. The portion of this ROW from Lakelhurst (Ciba-Geigy Crossing) is owned by Conrail. The potential of the at-risk ROW to be repurposed for other mobility uses and connections as one of many attributes of the CIBA site and the Route 37 Corridor that needs further study. With the potential for rail, the CIBA site could be very suitable for high industrial, R&D flex space and the new type of multi-level warehousing.

Norfolk Southern, who shares the rail network.

Create Redevelopment Plan

A formal redevelopment plan, prepared by the Planning Board and adopted by ordinance by the Township Council, allows for a mixed-use redevelopment on the CIBA site.
By adopting a formal plan, Toms River gains certain powers to affect redevelopment including the ability to establish a detailed program and craft specific design standards that can distill architectural and public space details far beyond traditional zoning standards. Having a clear plan in place also makes the property more attractive to potential developers since the plan and requirements are very clear.

The plan should include a combination of the various economic development strategies in the Vision Plan including a mixed-use core and a Tech Hub/Green Technology Campus among other uses. The images in this section illustrate the architectural and landscape character of the high-tech vision for the Corridor and could be the basis for some of the design standards in a redevelopment plan.

Some potential uses for the site include a satellite college campus, a site for small manufacturing, and mixed-use complex.
ECONOMIC DEVELOPMENT:
HOSPITALITY, HEALTHCARE & WELLNESS

MEDICAL OFFICE
Available office space should be inventoried and matched to existing demand. However, the office space currently available may not match the type of office space that is in demand. Over half of all existing office space in the Study Area was built during the 1980s, and no new office space has entered the submarket since 2005. As the office stock is aging, a detailed inventory is recommended to determine if certain office spaces need to be demolished in order to make reuse of the parcels more economically feasible.

New office space development will, by and large, come from medical office space demand, which is experiencing the fastest growth among all office segments nationally, and is attributable to an aging population and the rapid expansion of outpatient healthcare services. A further clustering of medical related facilities around the hospital is recommended, particularly if they continue to be tied to the senior communities and balanced with wellness facilities.

FITNESS AND WELLNESS
Healthcare is a key industry that could be expanded through programs focusing on wellness and fitness. These programs could be associated with local hospitals that have interest in internal wellbeing and wellness programs. Wellness providers offer programs and facilities for the entire community, including people of all ages. Fitness centers can also be built into medical facilities, and be open to patients undergoing rehabilitation, employees, and the public.

“GATEWAY” TO THE PINELANDS & ECO-TOURISM
Tourism has the potential to bring some economic benefits to the Corridor. While most of the focus of the region’s tourism is geared towards the Jersey Shore, there are other tourism and hospitality opportunities for the Study Area to develop. These could help satisfy a business travel need for the base, but might also include ecotourism.

Fitness centers can also be built into medical facilities, and include rehabilitation. Wellness programs offer programs and facilities for the entire community. These images are from a wellness-themed redevelopment in Jackson, TN where housing, medical, healthcare, and community uses are brought together.
and health and wellness facilities. The Study Area should capitalize on its prime location by serving as a landing point for this tourism. Tourists introduce money to the local economy, and eco-tourism and recreation related employment opportunities will expand.

Concentrated development in a node in the Study Area is necessary to properly absorb and capture the impacts of growth and the development of these expanding tourist industries in a manner that is consistent with the goals of Ocean County, the State Plan, and the Pinelands. This strategy will best ensure that the surrounding environs are preserved to maintain the natural features that can be an attraction. Inside the Study Area, the Heritage Minerals site can be an eco-destination. Miles of path and trails are proposed through the forested areas and around the lakes. An eco-education center is also proposed for the public to learn more about the wildlife and habitats in the region.

Within a short distance from the Study Area exists a wide variety of inland recreational and agricultural attractions. Nearby parks and recreational resources include:

- New Jersey Pinelands and various state parks and trails
- Winding River Park
- Barnegat Branch Trail
- Double Trouble State Park & Historic Village
- Cedar Creek
- Forest Resource Education Center

**HOTEL AND CONFERENCE CENTER**

The Joint-Base draws substantial business travel and many consultants and contract workers use hotels in Monmouth County or the western side of the base because there is more activity and options for dining and entertainment, particularly in locations that are in walking distance.

The Study Area should target a destination hotel to service existing and future tourism and business needs for the base and local business travel, as well as for small conferences, banquets, and events. A hotel facility in the Corridor could also include a health & wellness theme and draw on a larger hospitality and tourism business year-round.

- Inventory of existing office space
- Encourage medical clustering in zoning and redevelopment with a focus on fitness and wellness
- Target hotel and convention facility to serve Joint Base business and regional tourism
- Explore ways to create eco-tourism “gateway” to Pinelands and the Shore
EDUCATION & WORKFORCE DEVELOPMENT

SATELLITE ENGINEERING COLLEGE CAMPUS
Bringing higher paying jobs as well as increased opportunity for career advancement is a major goal of this plan. Engineering and R&D are thriving fields that provide higher wages and career advancement opportunities. Flex and R&D industrial buildings are growing in popularity because of their ability to support a hybrid of office, manufacturing, and warehouse space in a single location.

Although no additional R&D space has been completed within the submarket in recent years, REIS projects that, by 2018, an additional 175,000 square feet will be built and vacancy rates will decline to less than six percent - a sign of a strengthening R&D submarket environment.

The Ocean County College (OCC) Campus, Giba-Geity site, or area adjacent to the Joint Base serve as possible satellite campus locations for NJIT, Rutgers, Stevens Institute, or other engineering colleges/universities necessary to target higher-wage, growing workforce opportunities in engineering and research and development initiatives, providing degree programs to base and contractor employees. This will also help to also replace the aging civilian workforce at the Joint Base.

SPECIALIZED TRAINING FOR HEALTH, GREEN INDUSTRY, AND TECHNOLOGY
As the Study Area is characterized by high unemployment, it should look to OCC for workforce training opportunities. Ocean County College provides free training to area employers. As the Study Area plans to focus on health, green industry, and technology, OCC should be a key partner in providing training and education.

Lakehurst has their own internal training and vocation-technical school on base. Currently if a particular skill set is needed, they fly professors in from across the country, but could look to develop programs locally in partnerships with higher education providers. The base should continue to work with local schools to market their engineering needs and assist with expertise and funding for class projects to help them solve engineering problems.

BUSINESS INCUBATOR SITE WITH HIGH-TECH OFFICE
An incubator site could help address the lack of skilled jobs and career paths in the Study Area. Currently, many area residents must commute north due to lack of sufficient jobs in the local economy.

The Joint Base plan recommends facilitation or creation and management of incubator spaces for high-priority industries. Additionally, the Ocean County Master Plan recognizes that “Ocean County should assist in the identification of both

Education in the Study Area should be geared to training for engineering and R&D jobs that provide higher wages and career advancement opportunities.
green technology and federal procurement incubator programs, which would provide office space, commercial/retail support, and network opportunities for start-up businesses. The programs could also provide consulting services, financing programs, business training and international trade assistance."

**LIFE-LONG LEARNING PROGRAMS**

The Study Area is characterized by a large senior population. Some of these seniors may desire to continue working, but may need training in rapidly developing technologies and changes to the workplace. As mentioned in Section 1 of this report, the Toms River Master Plan calls for providing additional jobs and activities for the large local senior and professional populations. Training programs could help orient seniors to new job opportunities.

- Explore possible satellite campus locations to target higher-wage, growing workforce opportunities in engineering and R&D
- Use OCC specialized training options to customize programs for health, green industry, and tech training
- Explore a business incubator site that incorporates satellite campus and high-tech offices
- Expand life-long learning programs and access to training for seniors