

Tavistock Economic Analysis and Future Economic Impact Study

December 2011



Sponsor/Partner Acknowledgements

WRITTEN BY:

Karen Nelson Hamilton

DATA COLLECTION & ENTRY:

Charlotte Cuthbert

Karen Nelson Hamilton

ACKNOWLEDGEMENT:

This report is has been a collaboration between the Township of East Zorra-Tavistock and the Tavistock Chamber of Commerce. Survey development, expenses, and project coordination was a joint effort between the two organizations.

Coverage image taken from Tavistock Gazette, at www.tavistock.on.ca

A special thank you to all business owners, employees and residents of Tavistock who took the time to fill out the survey.

Messages/Greetings

The Township of East Zorra-Tavistock is very concerned about the impact the movement of the Bonnie Brae Long-Term Care Beds to London will have on our community. This concern extends from the well-being of the residents and their families, to employees that could be affected, to the businesses and Health Care network in Tavistock. The Township supports and embraces Tavistock being a Long-Term Care Centre of Excellence. The Township believes Tavistock has many attributes that make it an ideal location for redevelopment of Long-Term Care beds. Through this report, the Township, working in conjunction with the Tavistock Chamber of Commerce and the Community has quantified and established some baseline economic information to help deal with the potential loss of the Bonnie Brae and to demonstrate to the Ministry of Health and Long-Term Care why future development of the Long-Term Care system should take place in Tavistock.

Don McKay
Mayor, Township of East Zorra-Tavistock

The Tavistock Chamber of Commerce fully supports and endorses the information gathered in this Impact Study. The Tavistock Chamber of Commerce represents the businesses in the Tavistock and understands the importance of the Long-Term Care industry in Tavistock. The concentration of Long-Term Care beds generates economies of scale, helps to maintain a strong Village with a wide diversity of service options and helps to maintain the economic viability of the community owned, Tavistock Community Health Clinic.

Andrew Raymer
Chairperson, Tavistock Chamber of Commerce

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1.0 Introduction

In June of 2011, the Township of East Zorra-Tavistock, along with the Townships of Blandford-Blenheim, Norwich, South-West Oxford and Zorra began and Business Retention and Expansion (BR+E) Project to identify the business concerns and opportunities within rural Oxford. Due to the recent announcement of the potential transfer of 80 long term care beds from the Bonnie Brae facility in Tavistock to London, the Township decided to partner with the Chamber of Commerce to formulate a response to this potential change. As the BR+E project had already begun, efforts were combined to gather information that would be specific to Tavistock, along with the general BR+E survey.

This project was developed as an extension of the BR+E project, with surveys geared to business owners, employees and residents of Tavistock to gather information relating to economic development specifically in Tavistock, with a specific focus on the proposed transfer of 80 Long Term Care (LTC) beds. It is a partnership between the Township of East Zorra-Tavistock and the Tavistock Chamber of Commerce.

The objectives of this project were:

- To gather information to assist the Tavistock Chamber of Commerce and Township of East Zorra-Tavistock in the planning for future economic development.
- To determine the impact of the potential transfer of 80 beds from Bonnie Brae out of Tavistock.
- To provide information to assist the Chamber of Commerce, The Township, and the Rural Oxford Economic Development BR+E for future strategic action and development.

The results of the two surveys and the public session will assist to create a better understanding of the community as well as be used to evaluate the impact that may be created by the transfer of beds. The data collected from these surveys will be used to quantify a response to the Ministry on the potential transfer of LTC beds and may also be used in the final Rural Oxford Business Retention and Expansion Report.

This project was led by the Township of East Zorra-Tavistock and the Tavistock Chamber of Commerce. In total, two staff members were hired: both assisted in data collection and data entry and one analyzed the data and wrote the final report.

2.0 Methods

The resident and business owner survey were created in both traditional paper format as well as an online format using Survey Monkey. The resident survey was distributed to nearly 20 businesses and services for local area residents to complete. In addition, an online link was made available through the Township website to complete an online version. Paper copies were also distributed at many large businesses to have employees fill out.

Paper copies of the resident survey were also made available at the Public Meeting, which was held on December 5th. The Public Meeting was also used to gather feedback through the use of focus group sessions, to get responses from participants. Over 100 residents attended the session. Questions in the focus group included:

1. What are the social impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?
2. What are the health care impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?
3. What are the economic impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?

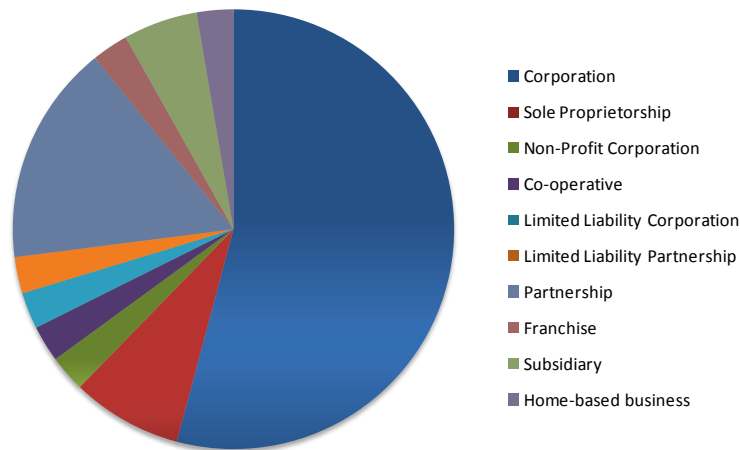
Many of the business surveys were completed in conjunction with the BR+E project. Businesses that were randomly selected for the BR+E survey were contacted, and if they agreed, participated in both the BR+E survey, as well as the Tavistock Business Owner survey during the visit. Additionally, the Chamber of Commerce and Township sent out electronic surveys to businesses on their business lists.

3.0 Business Survey

3.1 Survey Response Background

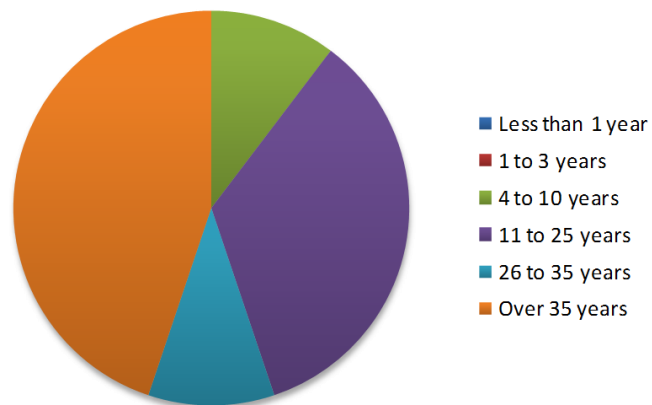
A total of 30 business owner surveys were completed: 11 were completed online, and 19 were completed through an interview process as part of the BR+E project. Approximately 60% of the business in Tavistock responded to the survey.

The business owners were from a variety of business types, with the majority (over 66%) being a corporation, followed by a partnership (20%) and sole proprietorship (10%).



The businesses surveyed also varied in terms of length of operation. Many of the businesses (nearly 45%) have been in operation for over 35 years. This was followed by 34.5% in operation for 11 to 25 years, 10.3% for 26 to 35 years, and another 10.3% for 4 to 10 years. There were no business owners who responded reported being in operation for less than 4 years.

How many years has your company been in operation in this community?



The businesses ranged in the number of employees they have, ranging from 1 employee to over 200. The majority of businesses (20.7%) had 5 to 9 employees. There were 5 businesses that employed less than 4 employees, 5 businesses with 10 to 14 employees and 5 with 20 to 29 employees. Of the businesses, 3 reported having 30 to 40 employees, and 3 reported having 100 to 299 employees. No businesses that participated had more than 300 employees.

The majority of business owners that responded to the surveys employed full time workers, accounting for 401 full time jobs in Tavistock. Many also employed part time employees, adding up to 204 part time positions. There were also a few businesses that employed seasonal workers, with 10 positions being created in the summer, and 60 in the fall.

Business owners generally reported that many of their employees live within the community. However, most businesses also reported that about half of their employees are from outside the Township and/or County. Employees from outside the municipality were primarily from Woodstock and Stratford.

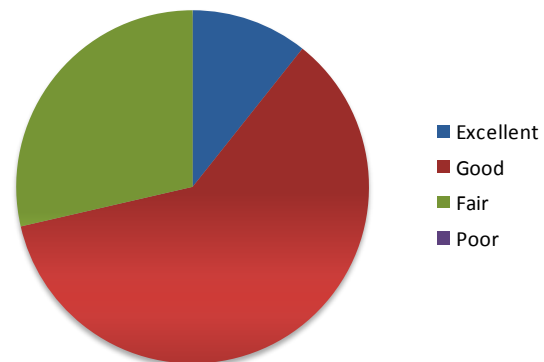
Business owners were asked several questions relating to business climate, future plans, business and workforce development, and overall economic development. Those responses are addressed below.

In addition, businesses were asked questions relating specifically to the potential transfer of beds, which will be addressed in section 5.3.

3.2 Business Climate

Businesses were asked to rate the local business climate in Tavistock. This was defined as the conditions within a community that have an effect on the success of overall business operations.

Please rate the local business climate.



The majority (60.7%) of respondents rated the local business climate as ‘good’, while a much smaller percentage (10.7%) rated it as ‘excellent’. On a positive note, none of the respondents rated the business climate as ‘poor’, although 28.6% rated it as fair, suggesting there is room for improvement in this area.

Business owners were next asked if their attitude about doing business within Tavistock has changed over the past 3 years. The majority (51.9%) said their positive attitude had not changed, while 14.8% indicated they are now more positive. Adversely, 29.6% indicated they were more negative, while only one respondent indicated their attitude was still negative.

Business owners were asked to rate their level of satisfaction relating to a variety of services provided by both community organizations and local government.

Level of satisfaction with services from community organizations and local government	
Service	Average Rating
Schools	3.41
Workforce Planning Board	1.22
Community College	2.54
University	2.20
Child Care Services	2.40
Cultural Facilities	3.19
Medical and Health Services	3.92
Chamber of Commerce/Board of Trade	3.54
Business Improvement Area	1.88
Business or Economic Development Corporations	1.72
Manufacturing Consortium	1.68
Planning, Engineering, Zoning and Building Permits	3.27
Health Unit Approvals	3.12
Policing	4.07
Fire Prevention and Services	4.50
Library	4.04
Recreational Facilities	4.15
Public Utilities	3.50
Street Repairs	3.30
Snow Removal	3.96
Garbage Removal	3.75
Scoring system: 1 – No contact, 2 – Very dissatisfied, 3 – Somewhat dissatisfied, 4 – Somewhat satisfied, 5 – Very satisfied	

Using a rating system (1-5) based on the responses; each service has an average rating which can be used to determine an average response for each service. For schools, the average respondent was between somewhat satisfied and somewhat dissatisfied. For workforce planning board the average respondent had no contact, many of whom were not aware that the organization exists. For childcare services the average respondent was between very dissatisfied and somewhat dissatisfied. For medical and health services the average respondent was somewhat satisfied. For Business Improvement area, the average respondent had no contact. For policing the average respondent was somewhat satisfied. For street repairs the average respondent was between somewhat dissatisfied and somewhat satisfied. These are some of the more notable responses. A complete breakdown of the average response for each service is available in the table above.

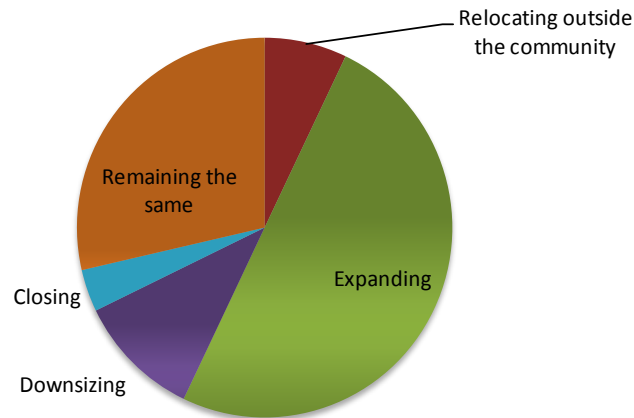
When asked if they had any specific recommendations to improve the local business climate, answers varied. The most frequent responses included to:

- Improve the overall look of the downtown area, including streets and lighting
- Reduce property taxes
- Promote local shopping
- Provide consideration of economic impact by all levels of government on their decisions that affect local businesses (i.e. roads)

3.3 Future Plans

Business owners had a variety of responses regarding their future plans. The majority (50%) planned to expand over the next 3 years. Another significant proportion (28.6%) indicated they will stay the same, while 10.7% believe they will be downsizing. Two respondents said they will be relocation outside the community while one indicated they would be closing down.

Which would best describe your plans for your business over the next 3 years?



Many businesses (18 of 24) said that their answer would not change if they transfer of beds would be approved. This is discussed in more detail in section 5.3.

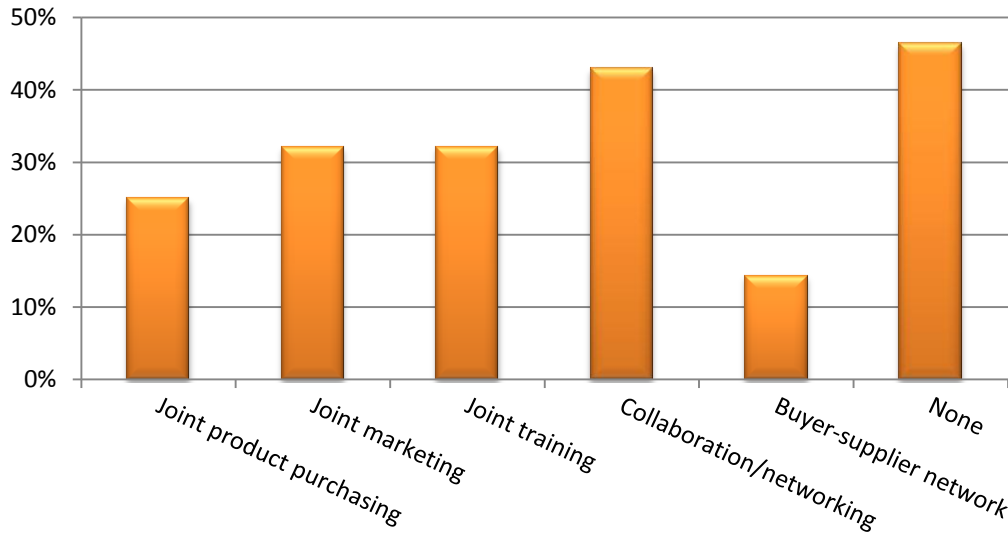
3.4 Business Development

The next set of questions related to business development. Businesses were asked what products or services they would like purchase locally (with the Tavistock area) or with the region (Oxford County).

Of the 18 responses 4 indicated they already shop locally, 4 indicated office supplies, 4 indicated specialized trades, while other single responses included clothing, baking supplies, hardware, and restaurants.

Business owners were then asked if they would be interested in cooperating with other businesses within Tavistock for a variety of business development initiatives. Many businesses expressed an interested in collaboration/networking/information sharing, joint marketing and joint training; while very little expressed an interest in service buyer-supplier network. Also of note is that 46.4% of respondents indicated they would not be interested in cooperating with other businesses.

Are you interested in working co-operatively with other businesses in your community to pursue any of the following?

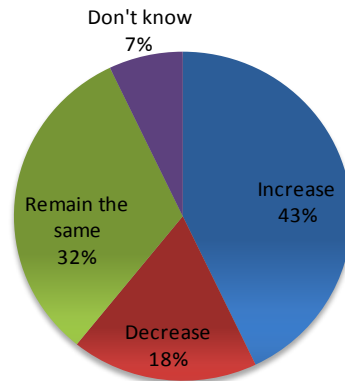


3.5 Workforce Development

Business owners were asked if they expect their workforce (number of employees) to change within the next 3 years. The majority (42.9%) expect to increase in employees.

Many of the businesses (20) indicated that their response to this question would not change if the transfer of beds is approved, while 5 businesses do believe their answer will change. For more on this, please see section 5.3.

During the next 3 years, do you think the number of employees in your business will increase, decrease or remain the same?



3.6 Community Development

Business owners were asked to list the advantages and disadvantages of Tavistock as a place to do business. The advantages included that:

- Tavistock is a supportive community
- There is limited competition due to lack of similar businesses
- The small town atmosphere attracts some businesses and residents
- The strategic location provides enhanced accessibility
- There are often lower costs to run a business in Tavistock than the surrounding urban communities

The negative impacts that businesses noted included:

- Lack of population – both with residents and businesses – becoming worse within the last 5 years
- Lack of selection and variety of businesses and services in town
- Lack of community support for local businesses. Businesses often lose business to urban areas, since residents are doing a lot of out of town shopping
- Limited worker pool

The business owners were next asked which new business, services or products that they would like to see added to the community. The most common responses were retail (8) and restaurants (7). Other notable responses include; seniors centre, splash pad and youth centre, florist and dollar store.

Business owners indicated a variety of ways in which the community, local government and organizations could give to support their business. The most popular response (52.6%) was business networking sessions, followed by joint advertising and marketing (47.4%). Other notable responses were website development and e-marketing.

Business owners felt that there have been a variety of positive and negative impacts on the community over the past 5 years. The positive impacts that businesses noted included that there is a new subdivision being built, that is attractive to business owners and residents. They also noted again the supportive community, and the expansion of both in town and nearby businesses.

For negative, they noted the increased challenges for small businesses to compete with the urban area businesses.

Business owners were asked to rank what they thought should be the top 3 economic development priorities in Tavistock. Responses were counted and given a weight for

the top three, and were ranked by the total of that. The top priorities, as rated by the responses were as follows:

1. Mainstreet development
2. Small business support
3. Support for farm community and agribusiness

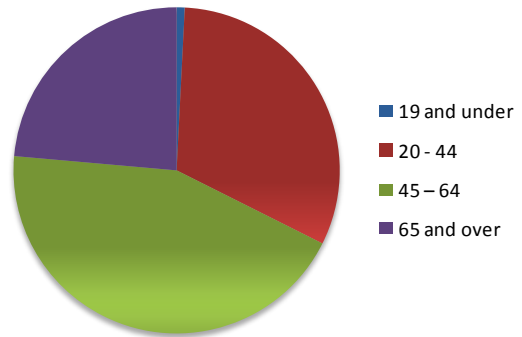
Support for health care services was a close fourth.

4.0 Resident Survey

4.1 Survey Response Background

A total of 266 surveys were completed: 121 online and 145 completed in hard copy. The majority of the respondents were female (over 66%) and over 67% were aged 45 and older. The annual household income varied amongst those who responded to the survey, with the median being approximately \$50,000 to \$74,000.

What is your age?



The majority (57.6%) of the respondents were from Tavistock, with the other from within 10km of Tavistock (22.7%), between 10 to 30km from Tavistock (16.7%) and 3% were from greater than 30km from Tavistock.

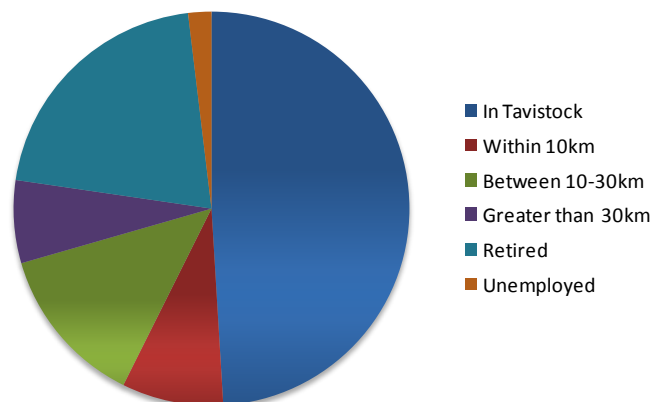
4.2 Survey Results

The following section provides a summary of the responses from the resident survey.

4.2.1 Place of work

Many of the respondents (49.1%) worked within Tavistock. Others who reported working traveled farther distances, with 35 respondents indicating that they travel 10 to 30km for work. In addition, many of the respondents reported that they are retired.

Where do you work?



4.2.2 Shopping

Residents were asked to identify the top reasons that they choose to shop in Tavistock and the top reasons why they choose not to shop in Tavistock.

Residents tend to choose to shop in Tavistock due to support local businesses (71.3%), because it is close to home (71.3%) and due to the level of service (37.8%). Many also indicated that they shop in Tavistock because it is close to work (29.5%).

What are the top reasons you choose to shop in Tavistock?



Residents generally tend not to shop in Tavistock due to a lack of product selection (64.6%), prices of goods and services (21.8%) as well as store hours (21.8%).

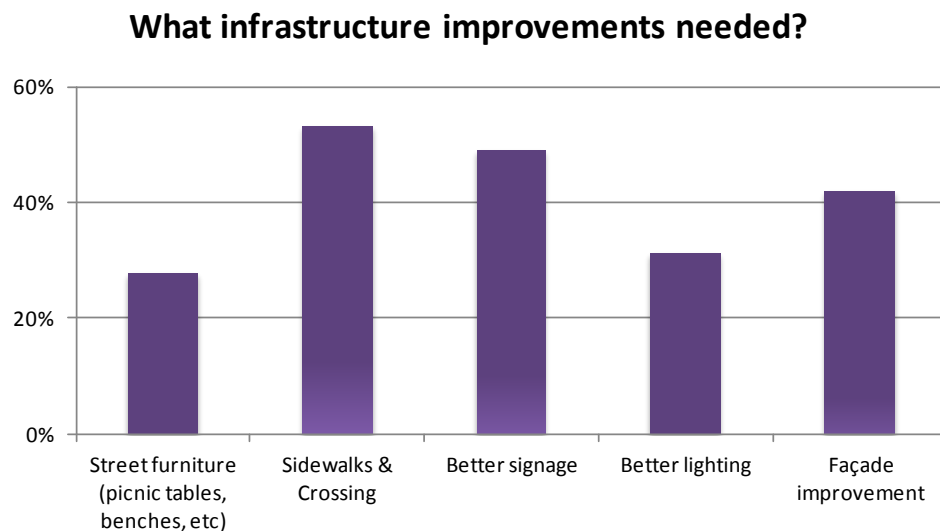
Respondents to the survey indicated that they use Tavistock as their primary shopping destination for groceries (50%), furniture (47.1%), hardware (68.1%) and banking (69.4%). The highest rate of responses for where respondents carry out their primary shopping was generally in London and Kitchener/Waterloo. A full breakdown of responses can be found in the appendix.

When asked to provide any additional comments on shopping in Tavistock, respondents had a variety of comments. The most frequent comments included:

- Better hours are needed in local stores (especially Sundays and evenings)
- Day to day needs are met locally, but larger shopping areas are close by, providing more selection and competitive pricing
- Often shopping is done while running errands in urban areas

4.2.3 Areas for Improvement

Tavistock residents were asked whether or not they thought improvements were needed to the appearance of the community. Over half the respondents (67.7%) agreed that improvements are needed. Of those who indicated that improvements are needed, they generally felt that they were needed for all of the choices provided.

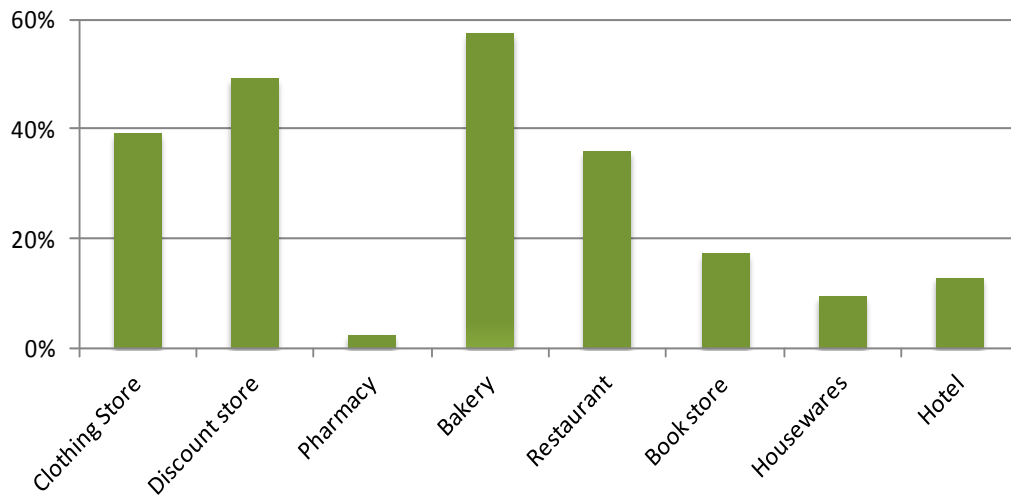


Over half (53.2%) felt that improvements were needed to sidewalks and crossings, and nearly half (48.9%) felt that better signage was needed.

4.2.4 Business Development

When asked what additional businesses or services are needed in Tavistock, over half of the respondents (57.5%) indicated that they believe a bakery is needed in Tavistock. Nearly half of the respondents (49.2%) would like to see a discount store, and many (39.1%) would like a clothing store.

What additional businesses do you think are needed in Tavistock?



5.0 Impact of Bonnie Brae

5.1 Proposal to Transfer Beds

Located in the center of Tavistock, Bonnie Brae is a licensed 80 bed long-term care facility offering light to heavy care. The facility, which was built decades ago, was given a “D” class rating by Ontario’s Ministry of Health and Long-Term Care, which means that it does not meet the building codes required for a long-term care facility. As a result, it must either renovate or close by July 1, 2014.

The owner of the facility has proposed a transfer of the beds to London, where Bonnie Brae residents will have the first priority to move into. The Bonnie Brae facility is one of three providing long-term care in Tavistock. Between the three homes there are 223 beds in Tavistock.

5.2 Background of Bonnie Brae

The following information relating to the Bonnie Brae facility has been provided by Paula Thomson, administrator of Bonnie Brae.

The makeup of the residents of the Bonnie Brae facility is as follows: 17.5% from Tavistock and the surrounding area, approximately 52.5% from other parts of Oxford County, leaving approximately 31.25% from other counties.

Of the employees, 29% are from the local area, with approximately 11 able to walk or bike to work. The facility also maintains 5 registered volunteers, as well as 23 students, although not all are pursuing health related careers.

The facility is not often a first choice for most residents, despite the quality of care it is known to give. The residents that are admitted often do not stay long, with the average resident spending 7 months at the facility. Of the residents, only 13 (16.25%) are permanent residents of the facility.

5.3 Business Survey

Along with conducting the survey for the Business Retention and Expansion questions, businesses were asked specific questions relating to Bonnie Brae. Businesses that were not selected to be a part of the BR+E were sent electronic copies of the survey to fill out.

Businesses were asked whether or not their attitude about doing business within the community would change if the Ministry approves the transfer of beds. Many of the businesses indicated that their attitude about doing business in the local community would change to become more negative if the transfer of beds were to be approved. Many of the businesses surveyed expressed that many of their customers are a result from the nursing home, and worry about the business they will lose from the resulting transfer. For other businesses, this question did not really apply, and therefore they indicated that their response would not change if the transfer of beds was to be approved, as it would not affect their business.

Businesses were asked what their plans were for the next 3 years, whether they would expand, close, downsize, move or remain the same. They were next asked if their response to this question would change if the transfer of beds from Bonnie Brae was to be approved. The majority of the businesses (75%) indicated that their future plans would not change if the transfer of beds would be approved. However, that means that one quarter of businesses would change their future business plans if the transfer of beds does occur.

Businesses were also asked whether or not they think that the number of employees they have over the next 3 years will change if the Ministry approves the transfer of beds. Of the businesses owners who responded to this question, 80% indicated that their number of employees would not change based on the transfer of beds. However, 5 businesses did indicate that their number of employees would likely change if that transfer did occur.

5.4 Resident Survey

Two questions were asked relating to the potential closure of Bonnie Brae. The questions and responses are as follows:

1. The Ministry of Health and Long Term Care may approve the transfer of 80 beds for patients from Tavistock to London. What is your biggest concern if this is approved?

Of those who responded to this question, the answers were largely similar. The most predominant responses included concern over the loss of jobs for local residents, as well as the overall impact it might have on the current residents of Bonnie Brae.

There was much concern expressed that those who may lose their job at Bonnie Brae will have a hard time finding new work, especially if they do not want to commute to London. For the impact on Bonnie Brae residents, respondents are concerned that many residents may not want to leave Tavistock, and that the relocation may place them farther away from families and social networks. Additionally, there was concern expressed by some seniors that fear that they may not be able to find a bed in Tavistock when the time comes that they will need it.

There is also concern relating to the impact that the transfer would have on families. Respondents expressed that it may be a large barrier to some families, who would have to drive longer distances to see their loved ones in a long-term care facility. It might also mean that there would be less time spent with family members as well.

Finally, many respondents indicated a concern for the overall economy in Tavistock. Staff, residents and visitors normally spend money in town, and there is concern over what type of impact that would put over local businesses if the transfer of beds is approved.

2. What should the community do if the Ministry approves the transfer of beds to London?

Responses to this question generally fell into four categories: appeal decision, advocate for other nursing homes to redevelop, grow retirement business, and many felt nothing can be done.

Many respondents felt that the decision should be appealed, and that the community should fight for Bonnie Brae to redevelop within Tavistock, or at the very least, within Oxford County. Some suggested that further talks with the Bonnie Brae owner on what it would take to redevelop in Tavistock may be needed.

Respondents also suggested advocating for the other two nursing homes to redevelop, and to bring more beds in that way. They generally expressed more concern over keeping the beds, as opposed to Bonnie Brae specifically, and felt this might be a better option to retain the beds in Tavistock.

Others suggested growing the retirement business – i.e. developing other types of housing for seniors that might not necessarily be long-term care.

Finally, many expressed frustration in that they felt there is nothing that can be done if the transfer of beds was to be approved.

5.5 Public Meeting/Focus Groups

A Public Meeting was held on Dec.5th to allow for community input into their thoughts on the potential transfer of beds. Tables were set up for groups of 10 ahead of time, and participants were asked to sit at a table. This allowed for more of a structured focus group setting and specific questions were asked by facilitators to each of the groups.

The questions included:

1. What are the social impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?
2. What are the health care impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?
3. What are the economic impacts of the proposed relocation of the Bonnie Brae facility from Tavistock to London?

The information gathered from this session has been broken down by each question and presented below.

5.5.1 Social Impacts

The information gathered relating to the social impacts can be broken down into four themes:

Travel

Many participants felt that the ability for residents to walk around outside of their facility would be easier in a small town than a larger city. They felt that residents would be more comfortable walking around in a smaller area, with services in close proximity

to their facility, and have the ability to interact with businesses and services outside of their care home.

Participants also felt that there would be an impact on travel for the families of residents in Bonnie Brae. It was noted that participants felt that it was inconvenient for families to drive longer distances to visit their relatives, and that driving in a more rural area would be easier. However, some participants did note that the travel time to London would actually be less for some families than it is driving to Tavistock, and that many people often visit London anyway, making the trip more convenient.

Community Access

Participants noted that based on the central location of the Bonnie Brae facility, residents who are mobile are able to visit several businesses in the main area. This would largely be Tim Horton's, the library, as well as access community groups and churches. It was also noted that the current location allowed school children to visit and interact with residents. While it was felt that many residents can walk to businesses and services within Tavistock, giving them greater access, it was noted by the Bonnie Brae administrator that only 6 (7.5%) of residents have the ability to walk to local businesses.

Another comment indicated that many employees who live in Tavistock can easily walk to work. However, information received from Bonnie Brae indicated that only about 11 employees can walk to work, which is less than one quarter of those employed.

Social Capital

Similar to community access, participants noted that residents at the facility have the ability to participate in many town activities, such as the Fall Fair and Seniors Picnic. There are also opportunities to be involved in the parades, churches, as well as have access to senior/children integration programs.

Participants also noted that there is a large volunteer base in Tavistock, who enjoy being able to assist with the Bonnie Brae residents. It has been confirmed that there are 5 volunteers registered with Bonnie Brae.

Personal Networks and Mental Stress

Participants voiced their concerns over the impact that would be placed on residents due to the loss of their relatives being close by. They also expressed concern over loss of personal networks for support – such as service clubs, churches, and other personal connections that they had created.

Many participants were highly concerned with the mental stress that residents may face, or may currently be facing with the stress of knowing that they may be moving, and not knowing where they will be moving to and when.

5.5.2 Health Impacts

Participants expressed concern over the amount of beds needed in the area. They indicated that the Stratford and Woodstock hospitals are currently looking after patients that should be in long-term care, and this problem would worsen should the beds be removed from Oxford County.

There was also mention that the concentration of the LTC facilities is an attraction for some of the doctors in the area, as well as the medical students that come to practice in the community. Many of the medical students come to Tavistock to gain practical experience with geriatrics, and participants are concerned that a reduction of beds may diminish the amount of students coming to practice in Tavistock.

Similar to the social impacts, participants were concerned with the mental health issues that may occur as the result of the move for both the residents and the family that would be affected by the move.

5.5.3 Economic Impacts

Many participants expressed concern over the loss of jobs, as there are 80 full time positions at Bonnie Brae. However, the administrator at Bonnie Brae clarified the concern relating to the misconceptions of not being able to work at the new facility. Any staff that has accumulated 3 years of full time experience would be eligible to work at another long term care facility, and all staff who fall short of those required hours have been informed by Bonnie Brae Management that their hours are short of this, and have been encouraged to obtain their proper certification. This accounts for 9% of the nursing department staff. However, these jobs would likely not be available in Tavistock.

Participants expressed concern over the loss of retail business, especially in the downtown area. It has also been suggested that staff often purchase beverages and meals locally (mainly Tim Horton's) and that families visiting often take the residents out for dinner, grocery shopping, and to a variety of other local stores. Additionally, Bonnie Brae often purchases supplies for local businesses, and uses local trades' people for many services. From an aesthetic perspective, participants expressed a concern for having a large vacant building on a main street of town.

Those in attendance also indicated that the transfer of beds could impact the doctors, as less funding would be available due to the reduced number of patients. This could affect the viability of them practicing in Tavistock.

Finally, participants expressed concern over the affect that the transfer of beds would have on the property tax base for the County and the Township.

5.6 Additional comments

5.6.1 *Canadian Mental Health Association*

The Canadian Mental Health Association Board of Directors discussed the Bonnie Brae issues during a November 2011 meeting. The board stated that they are aware of the increasing number of Oxford senior citizens requiring long term care placement. There is concern that current Bonnie Brae residents will need to locate outside of the County, placing stress on family members due to increased travel to see loved ones.

Additional concerns over those residents with mental health issues, and those who will develop mental health issues. Relocation outside of the county will provide increased difficulties to residents to obtain needed care and access to their community supports.

5.6.2 *Concerns from a local Physician*

The possible relocation of beds raises major concerns to a local physician. The physician expressed that it is already difficult to get admission to the hospital, as chronic care remains full until beds become available in nursing homes. If beds from Tavistock are relocated, especially outside of Oxford, the shortage will only worsen. This is especially true considering there is an aging population in the area, which means more beds will be needed in the near future.

The transfer of beds would have a negative effect on the viability of family medicine in Tavistock. The physician stated that an idea amount of physicians for the Tavistock facility is 4 – anything less than that would not be ideal for the community, and would be unattractive to new graduates. Further, the nursing homes in the area provide a source of income to the physicians, and if that source is taken away, there may not be enough work to keep four physicians in the medical centre.

As a teaching clinic, the 3 nursing homes provide training for geriatrics, as medical residents rotate throughout the 3 facilities. The loss of beds would mean that the quality of the training for the medical residents would be diminished.

6.0 Analysis

The analysis is broken down into two sections: why Tavistock needs the long-term care beds, and why Tavistock is an ideal place for long-term care beds.

The need for long-term care beds:

From the information gathered from the Resident and Business surveys, as well as the focus group sessions at the public meeting, it is clear that the social, health and economic impacts combined from the transfer of beds out of Tavistock would be quite large for the community.

For the business owners, especially those in the retail industry, there is fear that there will be a financial impact due to the loss of the customer base from the residents, staff and families associated with the Bonnie Brae facility. Many of the businesses have already, or are currently facing, loss of customers to the urban areas, and are worried that the potential loss of beds will only worsen this problem.

Tavistock residents are concerned about the overall impact it will have on the residents of Bonnie Brae, the staff, and their overall community. Many worry that the services provided to the residents within Tavistock – the volunteers from the community, as well as the social groups and other personal networks – will not be found in other locations. They also expressed worry over the loss of 80 full time jobs, and how that will affect the local businesses in the community, and worry that retail businesses, especially near the facility, may be at risk for closure. Finally, they worry about the overall economy, and the appearance to their community with the empty building.

A large concern is with respect to medical care for the community. Statements from a physician in the area express worry about future care if the loss of beds is to occur. Without the source of income provided by Bonnie Brae, it is unlikely the local medical centre will be able to expand its operations, which was the current plan. There is worry that the loss of the 80 beds will result in fewer physicians than ideal for the area. The lack of medical care could likely be a deterrent for future businesses and residents to come to the Tavistock area, which could potentially contribute to a domino effect for future economic development.

Finally, there is a concern that with the aging population in the area that there will not be enough beds for all who need them. In fact, data from the current Oxford Master Aging Plan shows that Oxford County has one of the highest proportions of residents aged 50 and over in the province, and that the number of seniors in Oxford County will increase by 38% over the next 10 years. Further, 25% of the population in Oxford County will be made up of seniors by 2021, according to research on the yet to be

released Seniors Health Status Report¹. Some residents who attended the public meeting and/or filled out a survey even indicated their own future worry about not being able to live out their life in Tavistock, as they may have to move to a facility further away.

Tavistock as an ideal location for long-term care beds:

Information gathered during this study suggests that Tavistock is ideally situated to house many beds for long-term care. Nursing staff and community members feel that the size of Tavistock is ideal for many of the patients, as they are able to become better absorbed into the community, create social networks, and have better physical access to amenities than they might in other communities.

Many have expressed that one of the features that makes Tavistock an ideal place for seniors is that it is relatively flat, making it easier for those with limited mobility to get around. The infrastructure that is already in place allows for wheelchairs and other devices to move about easier than it might be in other areas. Further, any improvements needed to maintain and/or improve the safety of the infrastructure should be quicker and less costly than in more urban areas with larger infrastructure.

Staff and community members have also expressed that the quality of care given to patients in Tavistock is known to be much higher than in many other communities. Further, the numerous volunteers within the community also contribute to the large amount of community support and the social gains that patients experience during their time in Tavistock. Residents in the nursing homes are also able to participate in the multiple community events, such as the parades that are put on and pass by their homes, as well as their annual seniors picnic, which has had a long history within the community.

Long-Term Care has been embraced and supported by the Tavistock Community for many years. While this has resulted in a statistically higher share of beds than other locations in the Province, it is a service the community and private operators in Tavistock are very good at providing. The synergies between the community, private operators and the Tavistock Community Health Clinic have resulted in first class Long-Term Care that warrants future Long-Term Care development opportunities.

¹ Bocking, C., and Jalon, O., Submitted for Oxford County. (2011 - not released). Seniors Health Status Report.

7.0 Actions and Implementation Strategy

There are many actions that can be taken out of this report. As the Business Retention and Expansion project is currently underway, the responses from the surveys that relate to the BR+E will be used to develop and support an overall economic development strategic plan that will become available in June 2012.

In terms of the impact relating to the loss of long-term care beds, there are many actions that should be taken immediately. These actions should be taken by the local and county council, staff, organizations, and all community members:

1. Support the redevelopment of the other two long-term care facilities

Continue to support the redevelopment of the other two long-term care facilities in an effort to keep providing a high level of care to seniors in the community, and hopefully allowing for more beds in the future.

2. Seek to support as many long-term care beds as possible for the community

Advocate for more long-term care beds to be brought into the two remaining facilities and assist in facilitating this transition.

3. Continue to lobby that this is a great place for long-term care to be delivered

Continue to promote Tavistock as an ideal place for long-term care. Ensure that there is an emphasis on promoting the amount of community support through the multiple organizations and volunteer networks that are available for long-term care residents, as well as the large amount of physicians available in close proximity to the facilities.

8.0 Conclusions

It is clear that the potential transfer of long-term care beds will have social, health, and economic impacts on the community. Participants in the survey and focus group process have made these impacts clear, and have made it clear the long-term care beds are important to their community. As Tavistock does have a reputation of being able to provide quality care for residents in long-term care facilities, there is a strong sense of wanting to maintain the amount of beds that it currently has, and that any loss of beds should be added to the other two facilities.

Township council, staff and residents should continue to encourage the redevelopment of the other two facilities, and the attraction of more long-term care beds to ensure that any impacts of the transfer of Bonnie Brae beds are limited to their community, and so that they can continue to provide complementary services to the Ministry of Health and Long-Term care in providing quality health care.

9.0 Appendix

9.1 Surveys

9.1.1 Business Survey

Tavistock Economic Development Survey Business Owner Survey

In June of 2011, the Township of East Zorra-Tavistock, along with the Townships of Blandford-Blenheim, Norwich, South-West Oxford and Zorra began a Business Retention and Expansion Project to identify the business concerns and opportunities within rural Oxford. The Tavistock Economic Development Survey is an extension of this project, with surveys geared to business owners, employees and residents of Tavistock to gather information relating to economic development specifically in Tavistock, with a specific focus on the proposed transfer of 80 Long Term Care (LTC) beds.

The data collected from these surveys will be used to quantify a response to the Ministry on the potential transfer of LTC beds and may also be used in the final Rural Oxford Business Retention and Expansion Report.

For more information, please contact:

Karen Nelson Hamilton, Business Retention and Expansion Coordinator

Phone: 519-671-1669 | Email: knelsonhamilton@zorra.on.ca

1. Which of the following best describes your business? Select all that apply.

- Corporation
- Sole Proprietorship
- Non-Profit Corporation
- Co-operative
- Limited Liability Corporation
- Limited Liability Partnership
- Partnership
- Franchise
- Subsidiary
- Home-based business
- Other (Specify): _____

2. How many years has your company been in operation in this community?

- Less than 1 year
- 1 to 3 years

- 4 to 10 years
- 11 to 25 years
- 26 to 35 years
- Over 35 years

3. Including Owner-operators, how many employees work at this location?

- 1 - 4
- 5 - 9
- 10 - 14
- 15 - 19
- 20 - 29
- 30 - 49
- 50 - 99
- 100 - 299
- 300 or more

4. How many of these Employees are...(Please enter a number)

- _____ Permanent Full-time
- _____ Permanent Part-time
- _____ Temporary
- _____ Seasonal spring
- _____ Seasonal summer
- _____ Seasonal fall
- _____ Seasonal winter
- _____ Contracted employees
- _____ Co-op students

5. What percentage of your employees live: (Should total 100%)

- _____ % Within the municipality
- _____ % Outside the municipality but within county/regional municipality
- _____ % Outside county/regional municipality

6. Please rate the local business climate

Local Business Climate refers to the conditions within a community that have an effect on the success of overall local business operations.

- Excellent
- Good
- Fair
- Poor

7. In the past 3 years has your attitude about doing business in this community changed?

- Yes - More positive
- Yes - More negative
- No Change - Still positive
- No Change - Still negative

8. Will your attitude about doing business within the community change if the Ministry approves the transfer of beds?

- Yes - More positive

- Yes - More negative
- No Change - Still positive
- No Change - Still negative

9. What are your specific recommendations to improve to the local business climate?

10. What is your level of satisfaction with each of the following services provided by community organizations and local government? Select answer for each. Use the following rating system:

- 1 = No contact
- 2 = Very dissatisfied
- 3 = Somewhat dissatisfied
- 4 = Somewhat satisfied
- 5 = Very satisfied

Community Organizations/Services	1	2	3	4	5
Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce Planning Board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
University	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child care services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical and health services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chamber of Commerce/Board of Trade	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BIA (Business Improvement Area) or BTA (Business Tourist Area)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business or economic Development corporations (i.e. CFDC)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manufacturing consortium/Sector association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Local Government	1	2	3	4	5
Planning, engineering, zoning, and building permits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health department/health unit approvals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fire prevention and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recreational Facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public utilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Street repairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snow removal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garbage removal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Which would best describe your plans for your business over the next 3 years?
- Relocating within the community
 - Relocating outside the community
 - Expanding
 - Downsizing
 - Closing Move to 27
 - Remaining the same Move to 29
12. Will your answer to the above question change if the Ministry approves the transfer of beds? If yes, why?
13. What products or services do you purchase locally or in the region?
14. What products or services would you like to purchase locally that are now being purchased outside of the region?
15. Are you interested in working co-operatively with other businesses in your community to pursue any of the following?
- Joint product purchasing
 - Joint marketing
 - Joint training
 - Collaboration/networking/information sharing
 - Service buyer-supplier network
 - None
 - Other (Specify) _____
16. During the next 3 years, do you think the number of employees in your business will increase, decrease or remain the same?
- Increase Decrease Remain the same Move to 46 Don't know Move to 46
17. Will your answer to the above question change if the Ministry approves the transfer of beds? Please explain.
18. List 3 advantages of your community as a place to do business.
1. _____
 2. _____
 3. _____

19. List 3 disadvantages of your community as a place to do business.

1. _____
2. _____
3. _____

20. Which new businesses, services or products would you like to see added to this community?

21. What assistance, if any, could the community, local government or economic development organizations give to support your business?

- Marketing seminars
- Access to capital seminars
- Trade shows
- Business networking sessions
- Export development programs and services
- Joint advertising and marketing
- Attraction of related supply & services businesses
- Workforce planning, employee training and attraction
- Identification of opportunities for shared use of buildings, infrastructure etc.
- Productivity improvement workshops
- Website development
- E-marketing
- Other (Specify) _____

22. In terms of overall impact on this community's economic development, what is the most significant change, positive or negative, that you have witnessed in your community in the past five years?

23. What do you feel should be the economic development priorities for the community? Rank the top three in order of importance (1 being most important)

- | | |
|--|--------------------------|
| Mainstreet development | Small business support |
| Attracting visitors/tourism | Health care services |
| Support for farm community and agri-businesses | Community infrastructure |
| Development of recreational facilities | Green energy initiative |
| Heritage and cultural promotion | |

24. What are the best mechanisms through which the municipality can communicate information related to business and economic development to you?

Business Improvement Area

Local media

Chamber of Commerce

Mail

Email

Service club

Telephone

Website

Thank you for completing the survey

Surveys can be returned to the location they were picked up at, or dropped off at:

Dundee Wealth

10 Centennial Drive, Tavistock

East Zorra-Tavistock Township Office

90 Loveys St, Hickson

You can also arrange for pick up by calling Rural Oxford Economic Development at 519-485-2490 ext 242

Tavistock Economic Development Survey Employee and Resident Survey

In June of 2011, the Township of East Zorra-Tavistock, along with the Townships of Blandford-Blenheim, Norwich, South-West Oxford and Zorra began and Business Retention and Expansion Project to identify the business concerns and opportunities within rural Oxford. The Tavistock Economic Development Survey is an extension of this project, with surveys geared to business owners, employees and residents of Tavistock to gather information relating to economic development specifically in Tavistock, with a specific focus on the proposed transfer of 80 Long Term Care (LTC) beds.

The data collected from these surveys will be used to quantify a response to the Ministry on the potential transfer of LTC beds and may also be used in the final Rural Oxford Business Retention and Expansion Report.

For more information, please contact:

Karen Nelson Hamilton, Business Retention and Expansion Coordinator

Phone: 519-671-1669 | Email: knelsonhamilton@zorra.on.ca

1. Where do you live?

- In Tavistock
- Within 10km
- Between 10-30km
- Greater than 30km

2. Where do you work?

- In Tavistock
- Within 10km
- Between 10-30km
- Greter than 30km
- Retired
- Unemployed

3. What are the top reasons you choose to shop in Tavistock?

- Close to home
- Close to work
- Price
- Service
- Quality
- Selection
- Unique products

To support local businesses

4. What are the top reasons you choose **NOT** to shop in Tavistock?

- Store Hours
- Parking
- Pedestrian Safety
- Prices
- Customer Service
- Product Selection
- Signage
- Attractiveness of area

5. What is the primary shopping destination for each of the following?

	Tavistock	Stratford	London	Woodstock	Kitchener/Waterloo
Grocery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Apparel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shoe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Furniture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appliances/Electronics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware, Paint	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gift and Novelty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Culture and Entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sporting Goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplementary Healthcare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Banking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Do you have any comments about shopping and services in Tavistock?

7. Do you believe that improvements are needed to the appearance and safety of Tavistock?

- Yes
- No

8. If you answered yes, what are the improvements needed?

- Street furniture (picnic tables, benches, etc)
- Sidewalks & Crossing
- Better signage
- Better lighting
- Façade improvement

9. What additional businesses do you think are needed in Tavistock?

- Clothing Store
- Discount store
- Pharmacy
- Bakery
- Restaurant
- Book store
- Housewares
- Hotel
- Other _____

10. What is your gender?

- Male
- Female

11. What is your age?

- 19 and under
- 20 - 44
- 44 – 65
- 65 and over

12. What is your annual household income?

- Under \$24,999
- \$25,000 to \$49,999
- \$50,000 to \$74,000
- \$75,000 to \$99,999
- Over \$100,000

13. The Ministry of Health and Long Term Care may approve the transfer of 80 beds for patients in Tavistock to London. What is your biggest concern if this is approved?

14. What should the community do if the Ministry approves the transfer of the beds to London?

Thank you for completing the survey

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9.2 Focus Group Results

What are the **Social Impacts** of the proposed relocation of the Bonnie Brae from Tavistock to London.

- Inconvenient to travel long distances for visiting
- “easier” drive in the country to Tavistock vs. big city driving
- Ability to walk around, interact with businesses – not possible in City
- Based on location, there are options to go to “Tim Hortons”, the library and be part of an active/busy community – even the trucks in and out of Yantzi’s provides a distraction and something to talk about
- Community groups & Church Groups visit
- School children visit and interact
- In town employees can walk to work
- Large volunteer contingent present in Tavistock
- Ability to participate in town activities, such as Fall Fair, Seniors Picnic, Parades, Churches, senior/children integration opportunities
- Loss of small town atmosphere
- Loss of relatives being close by
- Spouses have affordable options and a good social environment to be nearby, if they need to move to Tavistock to be close by (Service Clubs, Churches, opportunity for interaction with others)
- Loss of good jobs will affect the social fabric of the community and have ripple effects into other areas
- High degree of mental stress on residents – with moving and with the unknown of where they will be living
- The three nursing homes work together well, provides a cluster of Long-Term Care expertise and knowledge
- Student employment and interaction at Bonnie Brae would be lost
- While statistically, Tavistock is over-serviced with respect to Long-Term Care Beds, Tavistock is a “Centre of Excellence” when it comes to providing Long-Term Care – maybe the Province/LHIN should also take that into consideration when deciding where beds should be located

What are the **Health Care Impacts** of the of the proposed relocation of the Bonnie Brae from Tavistock to London.

- Long-Term Care Beds are needed in this area – Stratford and Woodstock Hospitals are looking after patients that should in Long-Term Care
- The concentration of Long-Term Care Facilities is an attraction for some doctors
- Medical students may no longer come to Tavistock to gain practical experience in Long-Term Care as a reduction in beds may diminish the critical mass required to make this possible
- Doctors know their patients in the Tavistock Long-Term Care Homes, which is less likely in larger centres
- Loss of Doctors in Tavistock would affect Health Care beyond the Long-

Term Care Facilities

- Possible loss of their General Practitioner if having to move to London or further away
- Loss of familiar care givers
- Increase in anxiety for residents (and their family)
- Trust issues for all (family members, residents)
- Loss of opportunity for your people to explore health care careers
- Larger/newer facilities does not always translate into better Health Care for people
- High Quality Health Care depends on the people, not the structure – newer structures offer some additional opportunities for programming and service, but you need the high quality people
- Quality of Health Care would be enhanced if the Long-Term Care, Assisted Living and Retirement Homes work together to provide the complete range of Health Care requirements – Tavistock already has this some degree and it should be maintained and enhanced, not taken apart
- Some good staff may start to leave the Bonnie Brae which may affect Health Care
- Dental Care is also available right in Tavistock as well
- Will likely be increased mental health issues for residents affected by a move

What are the **Economic Impacts** of the proposed relocation of the Bonnie Brae from Tavistock to London.

- Loss of jobs ~ 80 FTE
- Loss of retail business, especially in the downtown
- Possible real estate value reductions
- Increased costs and environment impact for those now commuting
- Loss of student employment opportunities
- Out of town staff and visitors will often spend money in town
- “Trickle Down” economic effect will spread throughout the village, as many business interact with each other
- Impact on Doctors / Tavistock Community Health Inc – local doctors are the Medical Directors at the facilities – this will affect the viability of practicing in Tavistock
- Bonnie Brae currently purchases some goods from businesses in town
- Local trades people are utilized for work
- Property Tax Base for County and Township affected (~\$55,000)
- Having a large vacancy on the main street is not good for the community
- Taxation loss for the Township and County (~\$55,000 / year)

