NEIGHBORHOOD 360°

# INWOOD
# MANHATTAN

## Commercial District Needs Assessment

NYC Small Business Services

Bill de Blasio
Mayor

Gregg Bishop
Commissioner

in partnership with

Washington Heights BID

# ABOUT INWOOD

The Neighborhood 360° program was created by the **NYC Department of Small Business Services** to identify, develop, and launch commercial revitalization projects in partnership with local stakeholders. Through proactive planning and targeted investments, Neighborhood 360° supports projects that strengthen and revitalize the streets, small businesses, and community-based organizations that anchor New York City neighborhoods.

The Neighborhood 360° **Commercial District Needs Assessment (CDNA)** highlights a neighborhood's existing business landscape and consumer characteristics.

This CDNA features the main commercial corridors in **Inwood** and was conducted in partnership with the **Washington Heights Business Improvement District** between February and June 2016.

Key issues and opportunities identified through this assessment will help prioritize SBS-supported local investments, and serve as an informational and marketing resource for the neighborhood.

### In This Report

Existing conditions, business data, and qualitative depictions of the neighborhood were gathered from more than **220 surveys**, as well as numerous interviews and workshops, with neighborhood merchants, shoppers, workers, community leaders, property owners, and residents.

*Jump to...*


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## Background

Inwood sits at the northern tip of Manhattan, at the confluence of the Harlem River, the Hudson River, the Spuyten Duyvil Creek, and some of Manhattan's most beautiful parks. A plaque in Inwood Hill Park, the only remaining natural forest in Manhattan, marks the spot where Dutch colonists purchased the island from the Lenape tribe in 1626. Today, Inwood is home to a diverse community of residents, small businesses, and cultural and medical institutions. The neighborhood is connected to the rest of Manhattan and the Bronx by the A and 1 subway lines, as well as the University Heights, Broadway, and Henry Hudson bridges.

Dyckman Street forms the southern boundary of the neighborhood, connecting a lower-density, mixed-use area along the Harlem River waterfront with a dense residential neighborhood across to the Hudson. Along Dyckman, longstanding bodegas, restaurants, clothing stores, and salons mix with newer restaurants and lounges to form one of Northern Manhattan's most popular commercial strips. The street is also home to Dyckman Houses, the neighborhood's only NYC Housing Authority development, alongside many quintessential prewar apartment buildings. This diverse mix of residents and storefronts extends north from Dyckman along Broadway, 10th Avenue, and the streets in between.

Along Inwood's western edge, parks and open spaces stretch from Fort Tryon Park around to the northern tip of the island. Just south of Inwood, the Met Cloisters brings visitors from around the world to its exhibits of medieval Europe. Farther north, Inwood Hill Park's rolling hills expose residents and visitors alike to scenic views of the Hudson River Palisades. At the northern tip of Inwood lie institutional anchors such as Columbia University's athletic facilities and NewYork-Presbyterian / The Allen Hospital.

The Harlem River waterfront, meanwhile, includes a mix of commercial, residential, utility, educational, and industrial uses alongside a partially accessible waterfront. In the Sherman Creek area (named for an inlet along the river), retail, wholesale, and auto businesses share the streets with Con Edison facilities, public schools, and a Metropolitan Transportation Authority rail yard. Despite the heavy rail and utility presence along significant frontage of the Harlem River, Inwood community members have worked hard to revitalize the waterfront for parks, recreation, and wildlife preservation.

## Neighborhood Demographics

See more on page 13

A diverse population of workers, entrepreneurs, and residents contributes to Inwood's thriving commercial and cultural life. Inwood's population of more than 40,000 residents represents a broad mix of ethnicities, national origins, and socioeconomic positions. Half of the population was born outside of the United States, largely in the Dominican Republic and Mexico, and about 75% identify as Hispanic or Latino.

## Future Opportunities

See more on page 5

A growing, culturally-rich population of residents, long-standing businesses, new entrepreneurs, and active community organizations position Inwood for continued vibrancy. Community members continue to invest in their local businesses, open spaces, and natural assets in partnership with institutional anchors and the City. New investments to organize merchants, enhance the neighborhood's retail diversity, and beautify its commercial corridors stand to make Inwood's streets even more attractive places for all residents and visitors to shop, work, live, and play.

# Inwood

## ▲ Current and Planned Developments

- Inwood Commercial Corridors
- Arts & Culture Destinations
- Public Facilities
- Co-Working Spaces

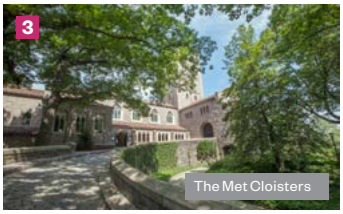
## Neighborhood Events

- #WHIN and Dine Uptown Retaurant Week
- Dyckman Basketball Tournament
- Inwood Film Festival
- Medieval Festival at Fort Tryon Park
- Uptown Arts Stroll

## Merchant & Business Groups

- Washington Heights Business Improvement District
- Northern Manhattan Improvement Corporation
- Sherman Creek Business Owners
- National Supermarket Association
- Northern Manhattan Restaurant and Lounge Association
- Community League of the Heights
- Washington Heights and Inwood Development Corporation
- Chamber of Commerce of Washington Heights and Inwood

## ▼ Notable Places



# KEY FINDINGS & OPPORTUNITIES

## Strengths

- Abundant parks and open spaces surrounding the neighborhood
- Beautiful rivers and waterfronts surrounding the residential and commercial area, with large untapped potential for activity
- Busy, well-known commercial corridors that attract residents as well as visitors from Manhattan, the Bronx, and beyond
- Premier cultural attractions, including the Met Cloisters and Dyckman Farmhouse, in or immediately around the neighborhood
- Large number of entrepreneurs and small businesses, including a significant number of long-standing businesses
- Vibrant and growing artist community invested in the neighborhood and looking for opportunities to contribute and grow in place
- Diverse collection of neighbors actively involved in community organizations and causes

## Challenges

- Public safety and noise concerns along commercial corridors, especially at night
- Graffiti and sidewalk issues reduce the walkability and appeal of the corridors for shoppers and residents
- Traffic congestion, limited parking, and safety concerns negatively affect both the pedestrian and driving experience along the corridors
- Lack of retail diversity, especially in arts, entertainment, healthy food options, and recreation
- Limited affordable commercial space for local small businesses to start and grow in
- Lack of recreational and cultural activities for youth and families
- Social and spatial boundaries that limit full use of the neighborhood by all residents

Sherman Creek Park

Guadalupe Restaurant

Compare Foods Supermarket

Dyckman Street Restaurants

Patacon Pisao Food Truck

Good Shepherd Church

215th Street 1 Train Station

Characteristic Prewar, Mixed-Use Housing

## Opportunities

- Activate Inwood's parks, sidewalks, and vacant storefronts with diverse cultural and arts attractions
- Attract new businesses to vacant storefronts that meet the neighborhood's demand for healthy food, family-friendly restaurants, arts, and entertainment
- Bring the natural beauty of Inwood's parklands into its commercial district by beautifying the streets and expanding family-friendly outdoor activities in open spaces
- Invest in sanitation services to address litter and graffiti and make Inwood's commercial corridors more inviting to residents and visitors alike
- Connect more local business owners to business support services that help them attract customers and thrive in place
- Leverage Inwood's growing artist community to support local business through public art initiatives
- Support local small business owners' efforts to organize, promote, and advocate collectively, including exploring the feasibility of a Business Improvement District (BID)
- Enhance lighting on key commercial streets to address safety concerns
- Market Inwood's diverse array of restaurants and retailers with a unified, bilingual website, advertising, and social media strategy

**What's Next?**

To address these key findings and opportunities, Neighborhood 360° Grants will be made available by SBS to not-for-profit organizations.

For more information, visit: nyc.gov/neighborhood360

# BUSINESS LANDSCAPE: INWOOD

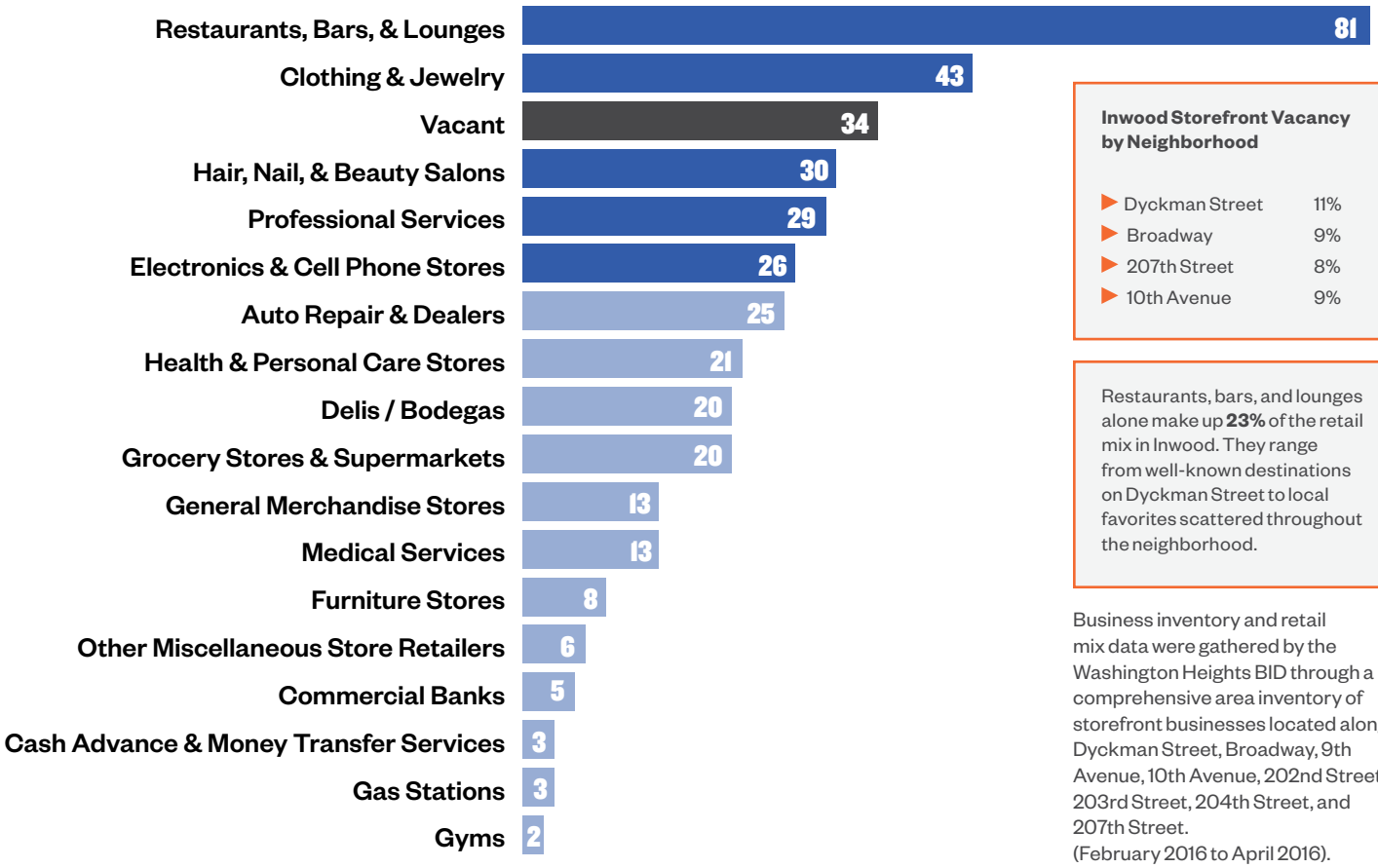
## Business Inventory

**382**
Total Number of Storefronts

**8.9%**
Storefront Vacancy*

*Note: In 2015, New York City's 69 Business Improvement Districts reported an average ground floor vacancy rate of 8.3% and median ground floor vacancy of 5.6% (SBS BIDs Trends Report, 2015).

## Storefront & Retail Mix



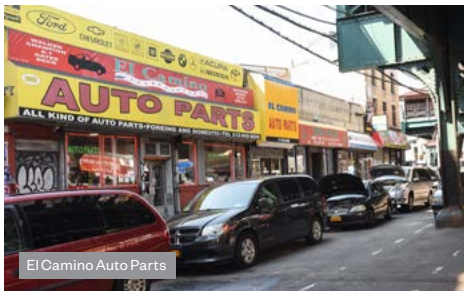

**Inwood Storefront Vacancy by Neighborhood**

| | |
|---|---|
| Dyckman Street | 11% |
| Broadway | 9% |
| 207th Street | 8% |
| 10th Avenue | 9% |

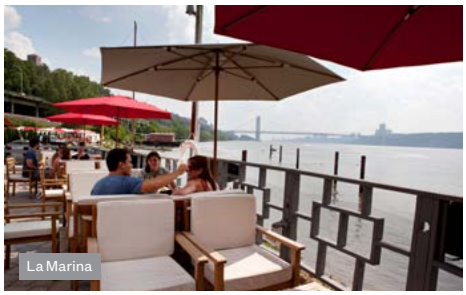
Restaurants, bars, and lounges alone make up **23%** of the retail mix in Inwood. They range from well-known destinations on Dyckman Street to local favorites scattered throughout the neighborhood.

Business inventory and retail mix data were gathered by the Washington Heights BID through a comprehensive area inventory of storefront businesses located along Dyckman Street, Broadway, 9th Avenue, 10th Avenue, 202nd Street, 203rd Street, 204th Street, and 207th Street. (February 2016 to April 2016).

Sushi Mambo

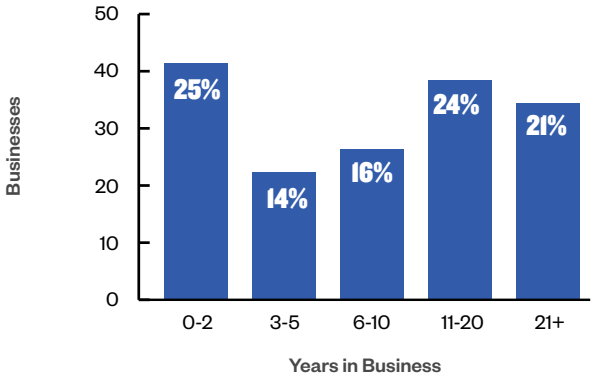


El Camino Auto Parts


La Marina

# What We've Heard from Inwood Merchants

## How many years have you been in business here?



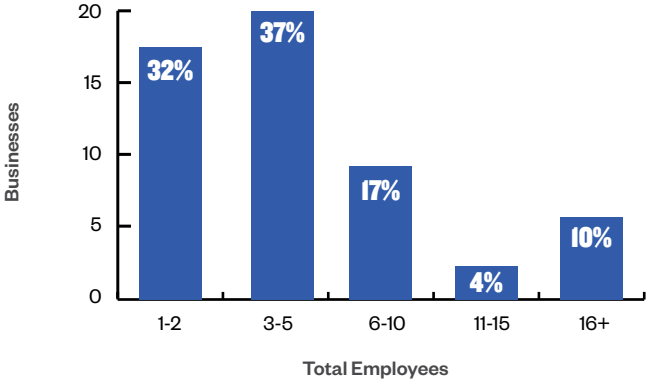

**11** Mean

**8** Median

**1** Mode

34 businesses, about a fifth of total respondents, have been in Inwood for *20 or more years*

## How many employees do you have?




## Do you own or rent your property?

**94%** Rent

**3%** Own

**3%** No Response

## How affordable is your commercial rent?

| | % Merchants |
|---|---|
| Affordable | 11% |
| Moderately affordable | 12% |
| Barely affordable | 53% |
| No response | 24% |

## Over the past year, has your business improved, stayed the same, or decreased?

**27%** Improved

**44%** Stayed the Same

**22%** Decreased

**7%** N/A or No Response

## What kinds of resources would help you grow your business?

| | % Merchants |
|---|---|
| ▶ Marketing support | 51% |
| ▶ Financing | 31% |
| ▶ Space / storefront improvements | 24% |
| ▶ New equipment | 18% |
| ▶ Legal / lease support | 14% |

## What changes need to occur in the Inwood commercial district to help your business grow?

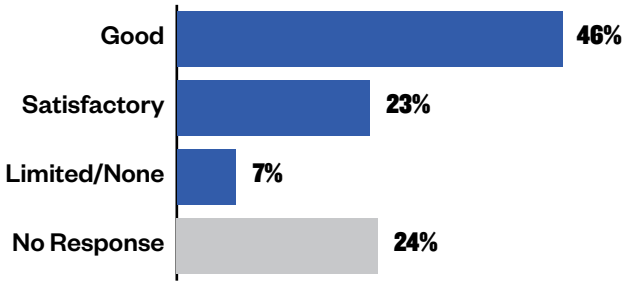
| | % Merchants |
|---|---|
| ▶ More parking enforcement and availability | 78% |
| ▶ Increased sanitation services | 42% |
| ▶ Additional landscaping to beautify the corridors | 42% |
| ▶ Improve storefront conditions | 29% |
| ▶ Public safety enhancements, especially lighting | 26% |

Source: Based on 171 merchant surveys conducted by the Washington Heights BID in Spring 2016.

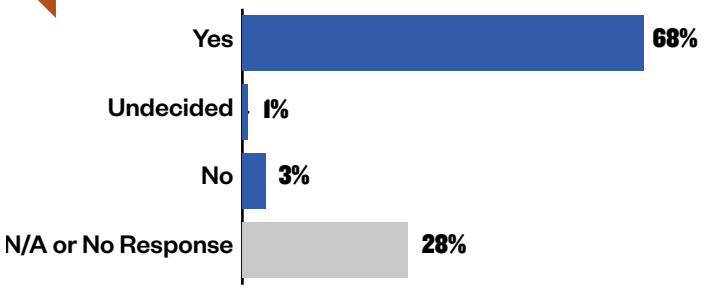
# BUSINESS LANDSCAPE: INWOOD

## What We've Heard from Inwood Merchants

### How would you describe your relationship with your landlord?




### Do you plan to renew your commercial lease?




## What We've Heard from Inwood Shoppers

### What changes would improve the Inwood commercial district?

"Keep it clean and support local businesses."

"The garbage pick-up must be increased. The amount of garbage in the street from the street vendors and pedestrians is so large it is hazardous."

"More trees and greenery, more places to sit, less loud music on the street, less loitering on the street."

"Outdoor community events and other community-member participatory commercial initiatives."

"Preserve the architectural character of Inwood."

### What types of businesses would you like to see in Inwood?

"We need businesses that cater to teens and young adults so they can entertain themselves in their community."

"What we need is a supermarket, fresh fish, and a meat market. Most of us are crossing into the Bronx to buy our food."

"I would say more family-style restaurants – more affordable and with a large menu selection. Think diner-ish with a ton of different foods for everyone."

"We don't have a lot of entertainment options, other than bars and restaurants."

"Arts and entertainment, small-stall retail indoor market."

# BUSINESS OUTLOOK

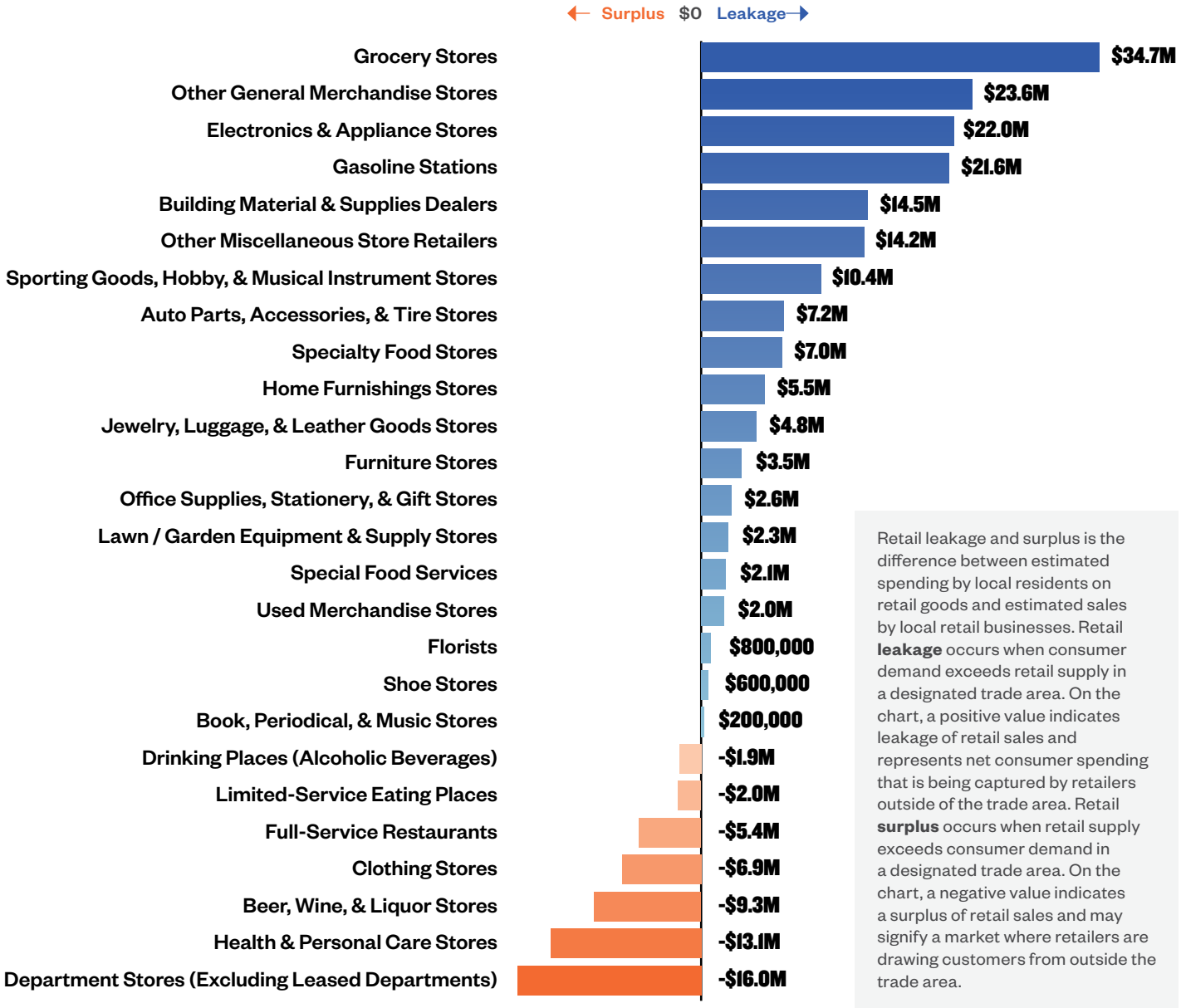
## Inwood Retail Opportunity

Residents spend
**$679.0M**
each year in goods and services

Local businesses make
**$457.5M**
each year in retail sales

Every year,
**$221.5M**
is spent outside the neighborhood

## Retail Leakage & Surplus




Retail leakage and surplus is the difference between estimated spending by local residents on retail goods and estimated sales by local retail businesses. Retail **leakage** occurs when consumer demand exceeds retail supply in a designated trade area. On the chart, a positive value indicates leakage of retail sales and represents net consumer spending that is being captured by retailers outside of the trade area. Retail **surplus** occurs when retail supply exceeds consumer demand in a designated trade area. On the chart, a negative value indicates a surplus of retail sales and may signify a market where retailers are drawing customers from outside the trade area.

Source: ESRI and Infogroup, August 2016.

# BUSINESS OUTLOOK

## Business Trends

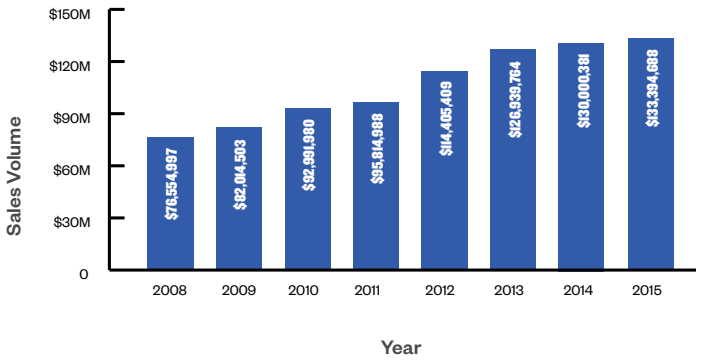
### Change in Total Business Sales, 2008-2015

| Inwood | Manhattan | NYC |
|---|---|---|
| ▲ 74% | ▲ 34% | ▲ 29% |

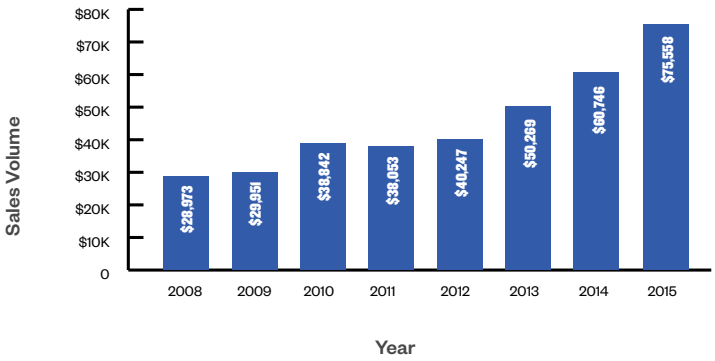
### Change in Median Sales by Business, 2008-2015

| Inwood | Manhattan | NYC |
|---|---|---|
| ▲ 161% | ▲ 133% | ▲ 105% |

### Inwood Total Business Sales




### Inwood Median Sales by Business




Source: Division of Tax Policy, NYC Department of Finance.

## What We've Heard from Shoppers

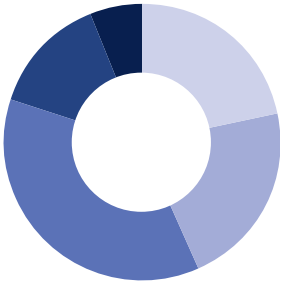
### What additional types of businesses would you like to see in Inwood?

| | % Shoppers |
|---|---|
| ▶ Full-service restaurants | 37% |
| ▶ Supermarkets, grocery stores | 33% |
| ▶ Arts and entertainment | 29% |
| ▶ Bookstores | 14% |
| ▶ Greater variety of clothing, accessories | 14% |
| ▶ Children's activities, recreation | 12% |
| ▶ Hardware stores | 12% |
| ▶ Cafes, coffee shops, bakeries | 10% |

### What types of businesses do you typically visit in Inwood?

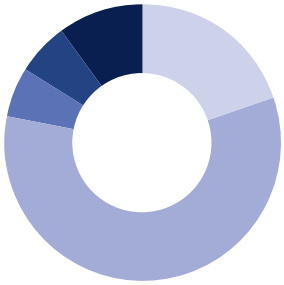
| | % Shoppers |
|---|---|
| ▶ Restaurants, bars | 71% |
| ▶ Supermarkets, grocery stores | 67% |
| ▶ Pharmacies | 29% |
| ▶ Bodegas, delis | 18% |
| ▶ Coffee shops, cafes | 12% |
| ▶ Pet shops | 12% |

### How often do you go shopping in Inwood?



| | |
|---|---|
| Twice daily | 22% |
| Daily | 22% |
| 2 to 4 times a week | 37% |
| Once a week | 13% |
| Not regularly | 6% |

### How safe do you feel shopping in Inwood at night?

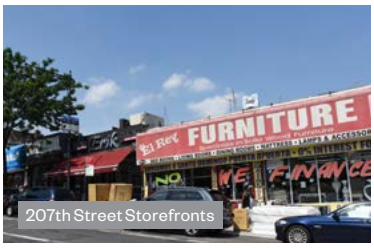


| | |
|---|---|
| Very safe | 19% |
| Somewhat safe | 59% |
| Not very safe | 6% |
| Not at all safe | 6% |
| N/A or No response | 10% |

Source: Based on 51 consumer surveys conducted by the Washington Heights BID in Spring 2016.

# PHYSICAL ENVIRONMENT

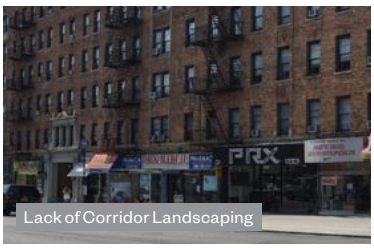
## Storefront Conditions



207th Street Storefronts

Graffiti, Litter, and Vacancy Issues

MTA Rail Yard 10th Avenue Frontage



Lack of Corridor Landscaping

## Streetscape Observations

- The 8.9% storefront vacancy rate disrupts the continuity of Inwood's corridors and reduces lighting and perceptions of safety.
- An analysis of all 348 occupied storefronts along Inwood's commercial corridors found that 19% are in poor condition, 39% are in average condition, and 42% are in good or excellent condition.
- The elevated 1 train along 10th Avenue and the adjacent MTA rail yard create challenges for lighting, pedestrian and traffic safety, and street beautification.
- With some exceptions, Inwood's corridors lack amenities like street furniture, public art, and signage.

❶ Dyckman Street has the highest concentration of good or excellent storefront conditions, which include both new and long-standing small businesses.

❷ 207th Street contains some of the poorest storefront conditions in the neighborhood, an issue among older and newer businesses alike.

❸ An inventory of sidewalk conditions on the corridors found 223 incidents of cracking, missing pavement, and other hazardous conditions, including 38 incidents on one block of Dyckman between Sherman and Broadway.

❹ 66 incidents of graffiti were also identified, including 30 incidents on the two blocks of 207th between Broadway and Sherman.

❺ An inventory of crosswalk conditions found 67 instances of potholes or missing / hard-to-see crosswalk lines, including 16 incidents on 9th Avenue between 204th and 207th.

❻ 117 incidents of missing or broken tree pit guards were identified on the corridors, including 10 on 204th Street between 9th and 10th Avenues.

Note: Colors on the storefront conditions map represent a block-by-block average of storefront scores.

# DATA APPENDIX

## Study Area Boundaries

### Assessed Commercial Corridors

Primary data on Inwood storefront businesses presented on pg. 6-7 was gathered along the following corridors:

- Dyckman St.: Payson Ave. to Nagle Ave.
- 207th St.: Broadway to 10th Ave.
- Broadway: Dyckman St. to 207th St.
- 10th Ave.: 204th St. to 216th St.
- 9th Ave.: 204th St. to 207th St.
- 202nd St. to 204th St.: 9th Ave. to 10th Ave.

### Inwood Context Area

Demographic and employment data from pg. 12-13 corresponds with the Inwood neighborhood context area.

### Trade Area

Retail leakage, surplus, and retail opportunity data on pg. 9 corresponds with the 0.25-mile trade area surrounding Inwood's commercial district.

## Area Demographics

### Total Population

| | |
|---|---|
| **40,715** | Inwood |
| 1,605,272 | Manhattan |
| 8,268,999 | New York City |

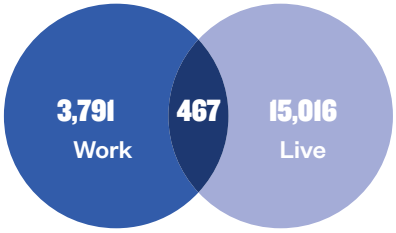
### Population Density (per square mile)

| | |
|---|---|
| **46,493** | Inwood |
| 69,803 | Manhattan |
| 27,027 | New York City |

### Average Household Size

| | |
|---|---|
| **2.8** | Inwood |
| 2.1 | Manhattan |
| 2.6 | New York City |

### Commuting Patterns




| | |
|---|---|
| **3,791** | **Work** in Inwood, live elsewhere |
| **467** | **Live & Work** in Inwood |
| **15,016** | **Live** in Inwood, work elsewhere |

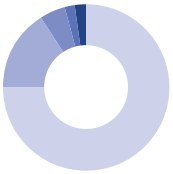
### Car Ownership

| | |
|---|---|
| **25%** | Inwood |
| 22% | Manhattan |
| 45% | New York City |

# DATA APPENDIX

## Area Demographics

### Race / Background

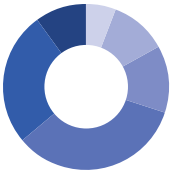


| | Inwood | MN | NYC |
|---|---|---|---|
| Hispanic or Latino (of any race) | 75% | 26% | 29% |
| White alone | 16% | 48% | 33% |
| Black or African American alone | 5% | 13% | 23% |
| Asian alone | 2% | 11% | 13% |
| Native Hawaiian and Other Pacific Islander | 0% | 0% | 0% |
| American Indian and Alaska Native alone | 0% | 0% | 0% |
| Some other race alone | 0% | 0% | 1% |
| Two or more races | 2% | 2% | 1% |

### Educational Attainment

| | Inwood | MN | NYC |
|---|---|---|---|
| 12th Grade or Less, No Diploma | 29% | 14% | 20% |
| High School Graduate | 20% | 13% | 25% |
| Some College, No Degree | 14% | 11% | 15% |
| Associate's Degree | 5% | 3% | 6% |
| Bachelor's Degree | 19% | 31% | 20% |
| Graduate or Professional Degree | 13% | 28% | 14% |

### Population Age



| | Inwood | MN | NYC |
|---|---|---|---|
| Under 5 Years | 6% | 5% | 7% |
| 5–14 Years | 11% | 7% | 11% |
| 15–24 Years | 13% | 13% | 14% |
| 25–44 Years | 34% | 37% | 31% |
| 45–64 Years | 26% | 24% | 25% |
| 65+ Years | 10% | 14% | 12% |

### Median Age

| | |
|---|---|
| **36.5** | Inwood |
| 36.5 | Manhattan |
| 35.6 | New York City |

### Foreign-Born Population

| | |
|---|---|
| **50%** | Inwood |
| 29% | Manhattan |
| 37% | New York City |

## Income

### Median Household Income

| | |
|---|---|
| **$40,395** | Inwood |
| $69,659 | Manhattan |
| $52,259 | New York City |

### Pop. Below Poverty Line

| | |
|---|---|
| **26%** | Inwood |
| 18% | Manhattan |
| 20% | New York City |

## Employment

### Population in Labor Force

| | |
|---|---|
| **70%** | Inwood |
| 67% | Manhattan |
| 63% | New York City |

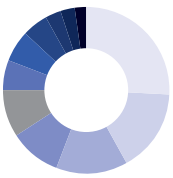
### Unemployment*

| | |
|---|---|
| **16.1%** | Inwood |
| 8.8% | Manhattan |
| 10.6% | New York City |

*Note: The unemployment rate for Manhattan is at 4.4% and for New York City is at 5.1%, as of June 2016 (NYSDOL); updated neighborhood-level data for Inwood is not available.

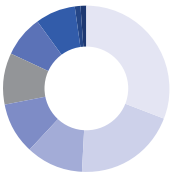
## Local Jobs and Employment

### Local Residents' Employment



| | |
|---|---|
| Educational Services, Health Care, Social Assistance | 26% |
| Accommodation, Food Services, Arts, Entertainment | 16% |
| Retail Trade | 14% |
| Professional, Scientific, & Technical Services | 10% |
| Other | 9% |
| Finance, Insurance, Real Estate | 6% |
| Manufacturing | 6% |
| Transportation, Warehousing, Utilities | 5% |
| Information | 3% |
| Public Administration | 3% |
| Construction | 2% |

### Jobs Located in Inwood



| | |
|---|---|
| Educational Services, Health Care, Social Assistance | 31% |
| Retail Trade | 20% |
| Information | 11% |
| Accommodation, Food Services, Arts, Entertainment | 10% |
| Other | 10% |
| Professional, Scientific, & Technical Services | 8% |
| Finance, Insurance, Real Estate | 8% |
| Construction | 1% |
| Transportation, Warehousing, Utilities | 1% |
| Public Administration | 0% |
| Manufacturing | 0% |

Sources: US Census Bureau, 2009-2013 American Community Survey and 2014 OntheMap Application.

# DATA APPENDIX

## Inwood Transportation

### ▼ Inwood Transportation

Bus Routes | NYC Subway | Bicycle Lanes | Metro-North Railroad

### Bus Routes

| | |
|---|---|
| 4 | Total MTA Bus Routes |
| 1 | Select Bus Service (SBS) Route Bx12 |

### Average Weekday Subway Ridership (2015)

| | |
|---|---|
| 9,317 | A Inwood - 207 St. Station |
| 7,233 | 1 Dyckman St. Station |
| 6,831 | A Dyckman St. Station |
| 6,541 | 1 207 St. Station |
| 2,012 | 1 215 St. Station |

### MTA Annual Bus Ridership (2015)

| | |
|---|---|
| 16M | Bx12 SBS |
| 5M | M100 |
| 4M | Bx7 |
| 204,173 | Bx20 |

### Vehicular Traffic

| | |
|---|---|
| 94,288 | Average daily vehicles at Henry Hudson Parkway |
| 36,917 | Average daily vehicles at the University Heights Bridge |
| 31,139 | Average daily vehicles on Broadway between W 218th Street and Dyckman Street |
| 24,928 | Average daily vehicles on 10th Avenue between Dyckman Street and Broadway |
| 11,709 | Average daily vehicles on W 207th Street between Broadway and 10th Avenue |
| 10,853 | Average daily vehicles on Dyckman Street between Nagle Avenue and 10th Avenue |

# Recent SBS Investments in the Neighborhood

- *Explora!,* Neighborhood Challenge marketing grant of $50,000 awarded to the Washington Heights BID, 2013.

# Existing Plans & Studies

*Sherman Creek Waterfront Esplanade Master Plan,* NYC Economic Development Corporation, 2011.

*Washington Heights-Inwood Planning & Land Use Study,* Manhattan Community Board 12 and City College, 2008.

*Sherman Creek Planning Study,* NYC Department of City Planning, 2007.

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Infogroup, Inc. 2016. From ReferenceUSA database.

Metropolitan Transportation Authority. 2015. Average Weekday Subway Ridership and Annual Bus Ridership.

NYC Department of Finance, Division of Tax Policy, using sales tax data from NYS Department of Taxation and Finance. Business sales are reported by tax year, which runs from March 1st to February 28th. Sales data are compiled from sales tax returns, which are rolled up by tax filer within a year, excluding returns with negative sales amounts. For each year, each tax filer is reported according to the address listed on their latest return. Large outliers were removed.

NYS Department of Labor. June 2016. Unemployment Rate Rankings by County.

NYS Department of Transportation. 2014. Annual Average Daily Traffic, using Traffic Data Viewer.

U.S. Census Bureau, 2009-2013 American Community Survey. Manhattan Census Tracts 291, 293, 295, 297, 299, 303, 307.

U.S. Census Bureau. 2014. OnTheMap Application. Longitudinal-Employer Household Dynamics Program (LEHD). Commuting Pattern data is representative of LEHD Origin-Destination Employment Statistics for the second quarter of 2014. LEHD data is based on different administrative sources, primarily Unemployment Insurance (UI) earnings data and the Quarterly Census of Employment and Wages (QCEW), and other censuses/surveys. In this context, only the highest paying job that is held over two consecutive quarters by an individual worker is counted toward worker flows into, out of, and within the context area.

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## ABOUT SBS

The NYC Department of Small Business Services helps unlock economic potential and create economic security for all New Yorkers by connecting New Yorkers to good jobs, creating stronger businesses, and building a fairer economy in neighborhoods across the five boroughs.

## ACKNOWLEDGMENTS

We would like to recognize and thank the following individuals and organizations for their contributions to the development of the Inwood Commercial District Needs Assessment:

Manhattan Borough President Gale Brewer
NYC Council Member Ydanis Rodriguez
Manhattan Community Board 12
Washington Heights Business Improvement District (BID)
Inwood NYC Stakeholder Working Group
Friends of Sherman Creek Conservancy
Community League of the Heights (CLOTH)
Northern Manhattan Improvement Corporation (NMIC)
Sherman Creek Business Owners
Washington Heights and Inwood Development Corporation
New York Restoration Project
Friends of Inwood Hill Park
Local Initiatives Support Corporation (LISC)
Inwood Merchants
Inwood Shoppers and Residents

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