



# FORWARD *together*

*Economic Resiliency Plan*

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*PREPARED BY*

**Chazen**  
A LaBella Company

 **camoin**  
associates

**sidekick**  
CREATIVE



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## ACKNOWLEDGMENTS

### WORKING GROUP

Michael Bittel • Adirondack Chamber of Commerce  
 Garry Douglas • North Country Chamber of Commerce  
 Bill Farber • Hamilton County  
 Dan Kelleher • Adirondack Park Agency  
 James McKenna • ROOST  
 Liza Ochsendorf • Warren County Employment & Training Administration  
 Jody Olcott • Essex County IDA  
 Laura Oswald • Washington County Economic Development  
 Jim Siplon • Warren County EDC

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 Danielle Delaini • Adirondack North Country Association  
 John Demarest • NYSDOS  
 Frank Dittrich • Inn at Erlowest  
 Chris Ericson • Adirondack Brewery, Big Slide Brewery  
 Kelly Eustis • Greenwich Chamber of Commerce  
 Sheila Flanagan • Nettle Meadow Farm  
 Andy Frey • The Woods Inn  
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 Carrie Howard-Canning • Champlain Valley Physicians Hospital  
 Mary Ann Johnson • Hudson Valley AgriBusiness Development Corporation

Alan Jones • Adirondack Community Action Program  
 David Kahn • Adirondack Experience  
 James Lemons • Lake Placid Center for the Arts  
 Tom McNichols • Strand Center for the Arts  
 Gina Mintzer • Lake George Chamber of Commerce  
 Connie Perry • Frisky Otter Tours  
 Sean Philpott-Jones • Hudson Headwaters Health Network  
 MariAnne Rapple • Fox & Fern  
 Lauren Richard • Adirondack North Country Association  
 Jessica Rubin • Hudson Headwaters Health Network  
 Andria Ryberg • Early Care and Learning Council  
 Lynn Sickles • Southern Adirondack Child Care Network  
 Emily Stanton • Olympic Regional Development Authority  
 Gretchen Steffan • SWW Workforce Development Board  
 Laura Trudeau • Parker Family Maple  
 Lindsay Turner • Adirondack Foundation  
 Donna Wadsworth • International Paper  
 Rob Wick • Essex County Community Resources  
 Kyle Wilbur • NYSDOS  
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## LETTER FROM THE DIRECTOR

As the impacts of the pandemic linger in our everyday lives, we are all looking to the future and wondering how we can come out of this better, stronger, and more resilient.

**"Never let a good crisis go to waste."  
- Sir Winston Churchill**

The pandemic illuminated the many underlying challenges that face our region for individuals, families, employees, businesses, and our communities. But it also brought the people of the region together. Fiercely independent, self-reliant individuals came together to aid and assist those in need and identify new approaches to age-old rural issues: food access, healthcare, and digital connectivity. The region responded and collaborated, which is no more evident than in the pages of this Forward Together Economic Resiliency Plan. This plan would not have been possible without the time and energy of all the individuals and organizations listed in the acknowledgment page, as well as the LCLGRP staff and Board of Directors. To them, I say thank you!!

This plan was developed with CARES Act funding from the US Economic Development Administration with the goal of expediting the region's recovery and making the region's economy more resilient to future disruptions. The work undertaken has helped identify priorities for regional investment and will provide a pathway to secure funding, with many efforts already underway. We've begun to add staff capacity as well as new programming, including our Business Retention and Expansion (BRE) Program, which aims to support the small businesses throughout our region.

What we also learned in developing this report and by talking to stakeholders and those impacted directly by the loss of employment or services, was that the region quickly adapted to address the challenges the disruption created. With this plan as a framework, we will work with our partners across the region to proactively and flexibly adapt to the ever-changing economic environment, and to support the residents and businesses that call our five-County region home.

As always, the Regional Planning Board is here to assist our communities in whatever challenges we may face, and we will continue to provide opportunities for collaboration and growth as we work to move the economy forward, together.

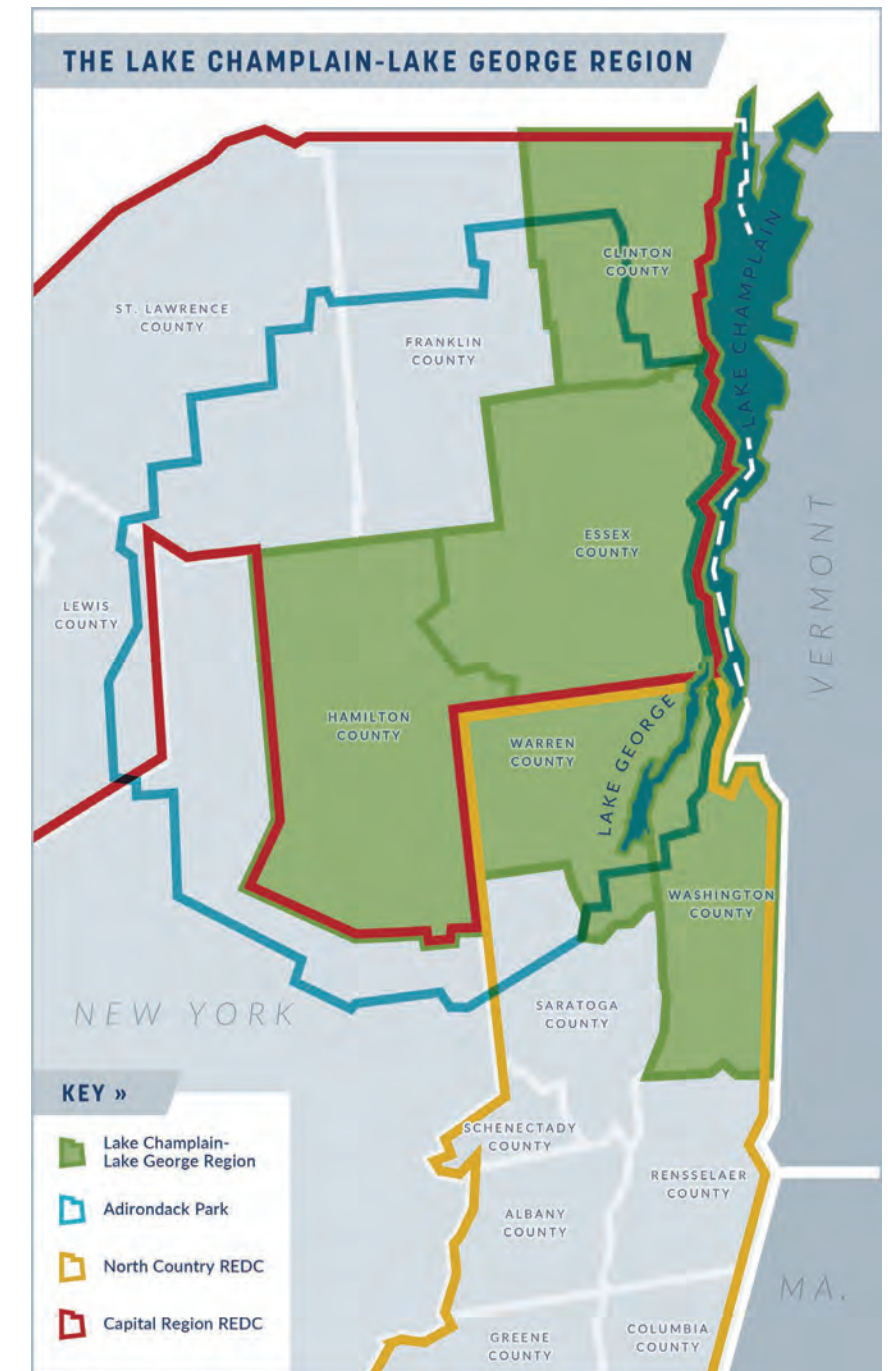
Beth Gilles  
Director, Lake Champlain-Lake George Regional Planning Board

## WHAT IS THE LAKE CHAMPLAIN - LAKE GEORGE REGION?

The Lake Champlain- Lake George Regional Planning Board (LCLGRP) is one of nine regional planning and development organizations operating in NYS. Created in 1967 as a development organization, our mission is to promote sustainable economic development that strengthens our communities, provides quality jobs, and preserves the unique natural, historical, and cultural characteristics of the region. We have a staff of four that is focused on supporting local economic and community development projects. The LCLGRP acts as a link between local needs and federal/state funding programs.

The LCLGRP serves five counties: Clinton, Essex, Hamilton, Warren, and Washington Counties (the "5-County" or "LCLG" Region). Over 4 Million acres in area with a total population of 256,120, the region is nearly as large as the states of Connecticut and Rhode Island combined. Eighty percent of the region is within the "Blue Line" that identifies the limits of the Adirondack Park jurisdiction, which serves as a destination for tourists seeking open space, mountains, and recreation. The LCLG Region is also divided between two State-designated Regional Economic Development Councils (REDCs): the North Country and the Capital Region.

The scenic beauty and rugged nature of the Adirondacks is contrasted with a lack of infrastructure and declining population. The major population centers include the cities of Plattsburgh and Glens Falls, which are located





at the northern and southern reaches of the region just outside the Blue Line. I-87 – “the Northway” provides the major transportation link north/south, connecting people, places, and trade from New York to Montreal and points between.

**Clinton County** (population 83,461), the northern most and most populous county, lies along the western shoreline of Lake Champlain and shares an international trade border with Canada - New York's and the United States' largest trading partner. Plattsburgh and its suburbs has developed a strong manufacturing base and are home to an aerospace/ transportation cluster with vital links to Montreal and its suburbs. SUNY Plattsburgh, the largest educational institution in the region, is also located in Clinton County.

**Essex County** (population 37,880)

is the largest county in area and home of the High Peaks. The county is characterized by vast wilderness, Whiteface Mountain, Lake Placid, and its Olympic venues. Located entirely in the Adirondack Park and bordered on the east by Lake Champlain, tourism and recreation opportunities abound in Essex County.

**Hamilton County** (population 4,305) is located entirely within the Adirondack Park and is the least densely populated county east of the Mississippi. Hamlets sprinkled among wilderness; Long Lake, Raquette Lake, Indian Lake, Speculator, and Lake Pleasant form the activity hubs in the County of trails, lakes, and rivers.

**Warren County** (population 67,079) is shaped by the Queen of American Lakes - Lake George - and the communities that have developed along

its shores. Glens Falls and Queensbury are home to arts, entertainment, and retail hubs. Lake George, Bolton, and adjacent areas are a thriving tourism-based economy.

**Washington County** (population 63,395), located largely outside of the Adirondack Park, is the southernmost county in the region. The County enjoys a thriving agricultural economy and growing agritourism economy. Tours like Maple Weekend, Fiber Tour, the Cheese Tour, and year-round events at the Washington County Fairgrounds attract thousands, but the County doesn't have a single hotel.

A portrait in contrasts. Each county, city, town, and hamlet is unique and has a reason to be proud and celebrate its history, character, and the people that make it a community.

## PLAN OVERVIEW

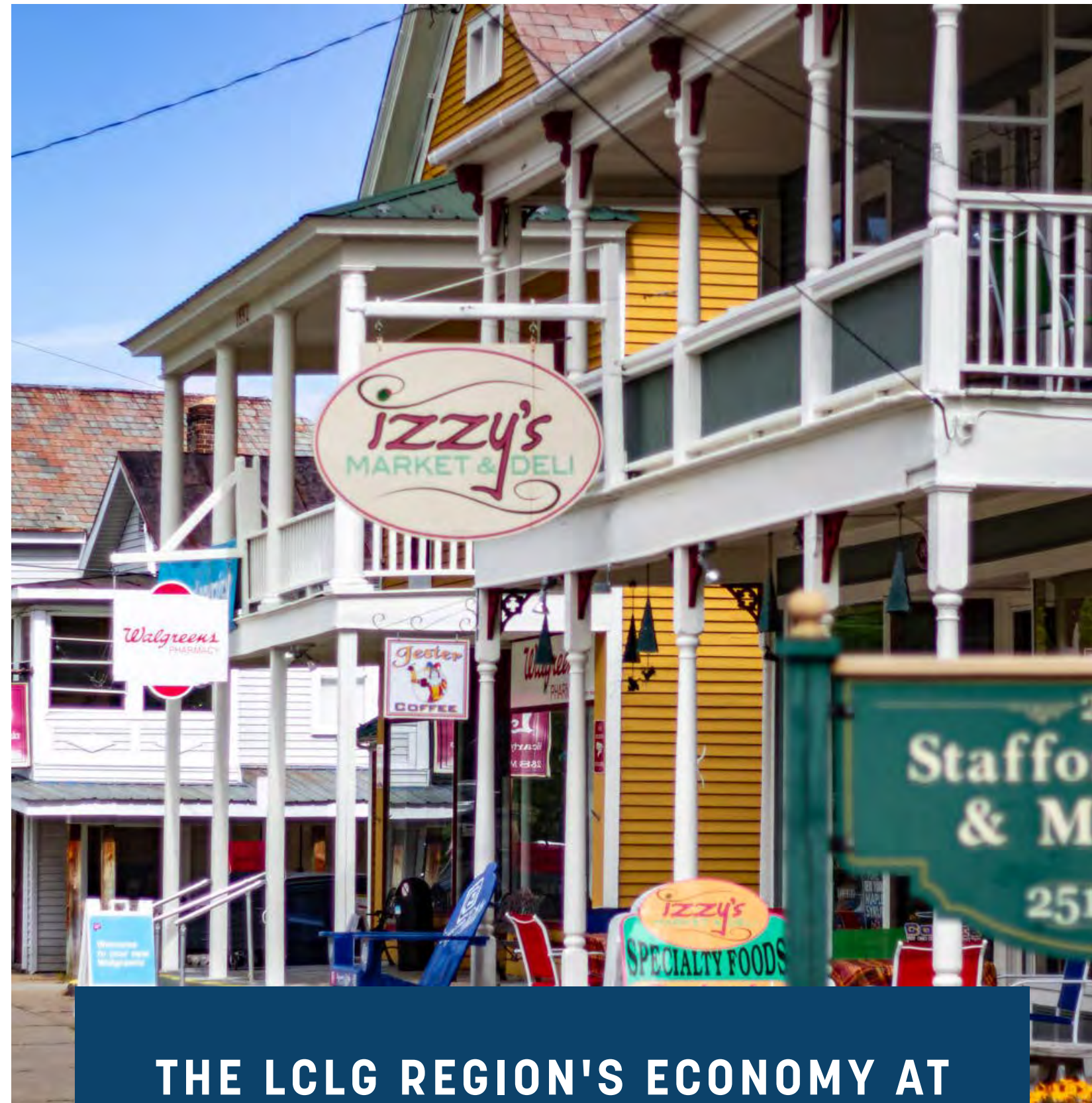
This plan reflects a nine-month effort of the LCLGRP and an assembled Working Group representing partner economic development and business related organizations across the region. The planning process began with a review of current conditions in the region, including preparation of an economic profile (Appendix A and summarized in the "LCLG Region's Economy At a Glance" section of this report), followed by a series of focus groups and stakeholder calls to dive deeper into the unique needs of the region's key economic sectors.

These initial efforts showcased the issues and opportunities that are affecting all sectors, including workforce (see "The Region's Workforce") and housing and infrastructure (see "Foundational Assets" section), as well as those regional assets that can be built upon to set the region apart (see "Competitive Assets" section).

The targeted one-on-one calls and small focus groups also highlighted the circumstances distinct to each sector and worth addressing - or highlighting - moving forward (see "Key Sectors"

section of this report).

The LCLGRP and Working Group used these regional issues and opportunities to identify economic imperatives and priority (short-term) and long-term projects needed for the region to recover and grow back stronger and more resilient. These plan recommendations are included in the final section of the report, "Moving the Region's Economy Forward, Together." An implementation matrix for the projects is included in Appendix E.



## THE LCLG REGION'S ECONOMY AT A GLANCE



### EMPLOYMENT TRENDS

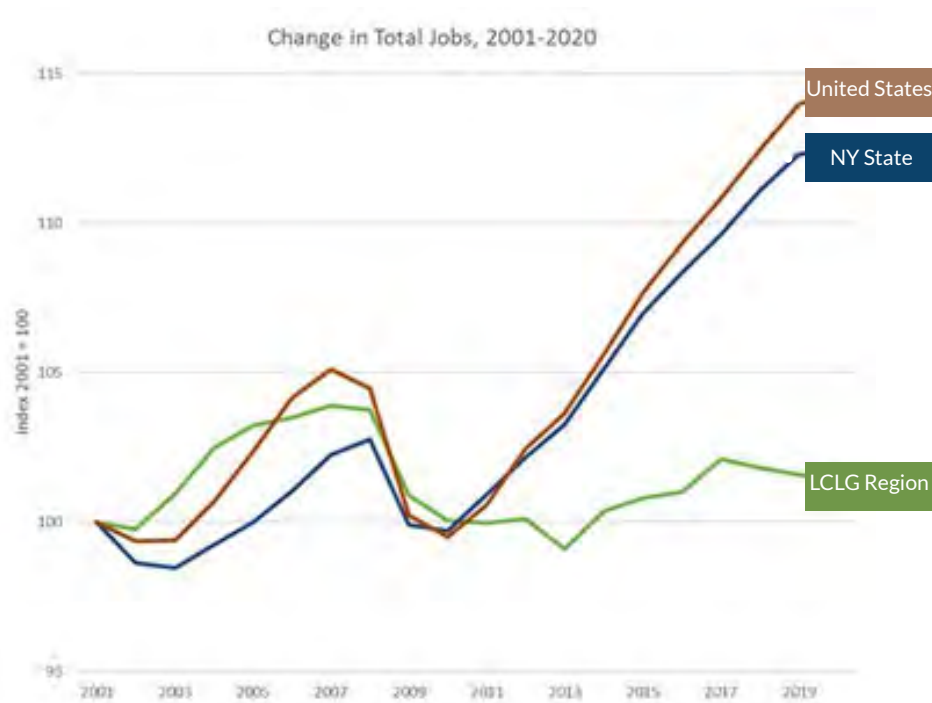
Before the onset of the pandemic (early 2020), there were over 113,000 jobs in the LCLG Region. Most of the jobs in the region are located in Warren County (36%) and Clinton County (33%), the two counties with the highest population and with the largest population centers, as noted above. Washington County represents 15% of the region's jobs, followed by Essex County (14%) and Hamilton County (2%).

As indicated in the chart to the right, looking at the region's pre-pandemic employment, the LCLG Region was still managing the long-term impacts of the 2008 Recession. Like many rural regions across the United States, the LCLG Region's economy has not bounced back like in New York State as a whole or in the United States. Since the 2008 recession, New York's employment grew by about 12% and the United States' total employment grew by about 14%. However, the LCLG Region expanded employment by just 1%.

Focusing on the five year period before the onset of the pandemic (2015 - Quarter 1 of 2020), Government sector jobs (including Federal, State, and local government, military and postal service, correctional facilities, and public schools and hospitals) grew the most in the LCLG Region, adding 462 positions to the industry. Industries that saw the greatest loss of jobs in that five-year span include Retail Trade and Administration and Support and Waste Management and Remediation Services.

### AVERAGE EARNINGS

Average earnings across the LCLG



Region is \$57,124, which is 35% less than average earnings statewide (\$88,755). Within the region, Washington and Clinton Counties have the highest average earnings per job, reaching \$59,204 and \$59,072, respectively.

### ECONOMIC PRODUCTIVITY

Gross Regional Product (GRP) demonstrates an industry's economic productivity. The top contributors to the GRP in the LCLG Region are:

- Government (20%);
- Manufacturing (15.9%);
- Health care and social assistance (10.5%); and
- Retail trade (9.8%)

### KEY INDUSTRIES

The LCLG Region's economy is driven by institutional and legacy industries. Medical institutions and education facilities ("meds and eds"), both public and private, support about one third of total employment.

The agriculture sector remains an important part of the legacy of the region, especially in Washington and Clinton Counties, and is the most concentrated industry in the region, with a Location Quotient (LQ) of 1.88.

The tourism and outdoor recreation sectors together make up over a quarter of the region's economy by employment, and drew in record setting numbers in 2020, as individuals and families sought outdoor vacation experiences closer to home.

While manufacturing plays a smaller role in employment overall, its contribution to GRP demonstrates its importance to the economy. The region is home to highly specialized manufacturing subsectors like Pulp, Paper, and Paperboard Mills, Medical Equipment and Supplies Manufacturing, and Leather and Hide Tanning and Finishing.

### ECONOMIC RESILIENCY INDICATORS

#### Supply chain disruptions.

Manufacturing subsectors were put at high risk of supply chains disruptions during the pandemic, impacts which are still felt at the time of this writing. This is particularly salient for LCLG's medical device manufacturing cluster in Glens Falls, which accounts for over 1,500 jobs in the region and makes up 2.2% of the region's total GRP. Paper mill-related sectors are also at high risk of supply chain disruption at the national level. Paper mills account for just over 1,700 jobs in the region and contributes to 4.1% of the region's GRP.

**Aging workforce.** Personal decisions surrounding the safety of working in certain settings during the pandemic greatly affected the national and regional economy. While the decision to leave or limit participation in the workforce at the height of the pandemic may have been the personal choices of workers, these circumstances will have lasting impacts on the nation's labor force participation rate even as fears specific to COVID-19 wane.

This is especially true for workers that were approaching retirement age and took this opportunity to permanently leave the workforce. Oxford Economics reported in February 2021 that more than 2 million workers have left the labor force to retire since the start of the pandemic. This is more than double the number of people who dropped out of the labor force to retire in 2019. This trend is relevant to the LCLG Region, as some of the area's most economically productive industries have a workforce composition that is about a 25-35%

individuals over the age of 55. The industries with the highest instance of 55+ workers include: Animal Production, Building Materials and Supplies Dealers, Offices of Physicians, Pulp, Paper and Paperboard Mills, and Medical Equipment and Manufacturing.

**Automation.** Technological uptake and automation is another factor impacting the local economy. While technology has the potential to displace workers, technology and digital tools can be greatly beneficial to today's employers, especially in today's labor market where labor is scarce. Automation of processes can help a business run more efficiently and maintain operations with a smaller staff. With shifting labor force trends and difficulty attracting people back to the workplace for varied reasons, companies could make further investment in technology to secure their ability to produce their service or product with less reliance on the whims of the labor market. Nearly a quarter of all jobs in the LCLG Region are at high risk for automation. At the top of the list include food and beverage servers, grounds maintenance workers, and construction trades workers.

*The information in this section is a summary of the data presented in the 5-County Economic Profile and 5-County Economic Resiliency Analysis provided in Appendices A and B, respectively. Please refer to those documents for additional information.*

## DEFINITIONS

### Gross Regional Product (GRP):

Monetary measure of the market value of all goods and services produced.

### Location Quotient (LQ):

a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study, relative to the nation. It can reveal what makes a region "unique" in comparison with the national average. A location quotient greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.





## THE REGION'S WORKFORCE

Across industries and across geographies, the LCLG Region is facing a workforce shortage. This shortage is not unique to the region, but reflective of broader, nationwide trends. Without an adequate (and increasing) labor pool, businesses are limited in their potential for growth. Some regional businesses have pivoted to models that require fewer workers, using technology in place of human capital, and the long-term implications of these changes remain to be seen.

### LIMITED POPULATION GROWTH

Limited population growth has direct implications for the region's economic sustainability, resiliency, and growth. A consistent population, relatively low median household income, and an aging population characterize the region's demographics. These trends are not uncommon to the North Country and other rural portions of the country. The ability of local businesses to grow is hindered when additional workforce is not readily available. While the region hopes to sustain and increase its population base by showcasing the economic and quality of life opportunities in the region, supporting career and skill building within the existing labor force must also be a strategy to catalyze economic changes. Growing the labor force from within will mean mitigating barriers to entering the workforce, like access to child care, transportation to employment centers, and access to affordable housing, among others. This could also mean working with populations that face additional behavioral health obstacles to employment, such as mental and substance use disorders, and need labor force reentry resources.

### DISRUPTIONS IN THE FOREIGN WORKER MODEL

The region's tourism and agriculture sectors have historically relied on foreign workers to meet heightened seasonal employment needs. With border closures during the pandemic, this employment resource was not an option, and employers scrambled to find replacements. While foreign workers have supported many sectors in the region for years, meaningful economic resiliency strategies will address potential future disruptions to this employee stream.

### NEW EMPLOYEE ATTRACTION APPROACHES

Workforce shortages occurring across the country forced businesses in the region to explore new models to attract workers. With increased remote work flexibility and decisions to relocate being place-based rather than job-based, the region should continue to highlight quality of life and, as discussed in the following sections, work to ensure that the region has the housing and infrastructure needed to attract and retain residents and workers.

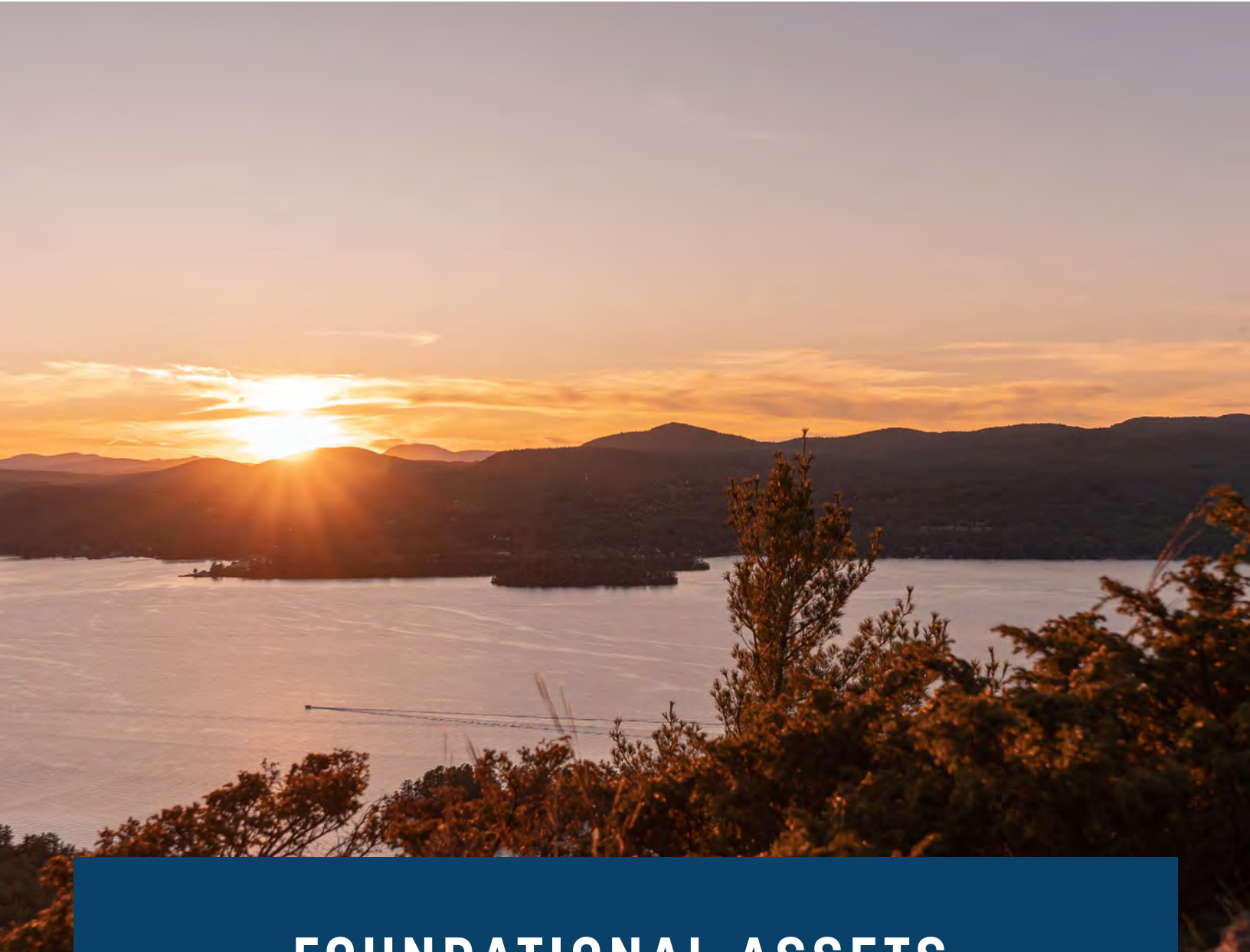
### ISSUES

- Regional population stagnation and population decline, combined with an aging workforce
- Other economic factors limiting the workforce pool
- Challenges recruiting workers limiting businesses' potential to grow
- Pandemic resulted in technology uptake, permanently displacing workers that will need retraining for other opportunities

### OPPORTUNITIES

- Continue to highlight the region's quality of life as a major attractor to the region, including outdoor recreation, cultural, and lifestyle offerings, to attract workers to fill local jobs and remote workers
- Increase connections between schools (K-12) and the local business community, such as a regional apprenticeship/mentorship model
- Explore new shared workforce models
- Tap into populations that have not traditionally been well represented in the workforce
- Highlight jobs' growth potential and benefits





## FOUNDATIONAL ASSETS

Foundational assets are those essential components of the region’s infrastructure that support the region’s businesses, residents, and workforce:

- **Housing.** Providing adequate housing for the region’s workforce is crucial for attracting and retaining a talented labor force and employers.
- **Broadband and cellular.** The shift towards a digital economy has sped up since the onset of

the pandemic. Access to reliable broadband and cellular services throughout the region is critical to stay competitive in a rapidly changing world.

- **Child care.** Access to adequate and affordable child care allows parents to participate in the workforce, making it easier for employers to fill positions with local residents.
- **Transportation.** Transportation

systems are essential for moving the goods and services that drive the regional economy, connecting the region’s labor force with employers, and connecting the region to the outside world.

- **Water and wastewater.** Water and wastewater infrastructure is needed to support existing and new development in large employment centers, downtowns, and economic hubs.

## HOUSING

Housing is a critical component in communities that are vibrant and resilient. A mix of commercial, industrial, and residential land uses diversifies tax revenue and creates an environment where workers do not have to travel outside of their community to work. Especially as the work-from-home movement sustains through COVID-19 recovery, people are thinking more about the spaces and environments they call home. The LCLG Region’s ability to support business development is tied greatly to where and how people can find homes in the region.

### LACK OF HOUSING DIVERSITY

Over 80% of housing in the LCLG Region is single-family. New rental housing construction has been limited, and many previous long-term rental housing units has been converted into short-term vacation rentals, particularly in tourism destinations like Lake Placid.<sup>1</sup> For rental housing that does exist, it is not easy to find, particularly for people moving to the area from outside the region. Employers in the region struggle to find the housing needed for new or prospective employees.

### HOUSING PRICES CONTINUE TO RISE

The shortage of available, quality workforce housing has been cited across the region for years. During the 10-year span from 2010 to 2020 the average single family home price in all five counties increased by 40%, approximately double the rate of

growth in median household income during the same time period. More recently, the increase of short-term rentals and second home purchases have led to skyrocketing housing prices, with the average sales price increasing by an additional 91% between 2020 and 2021. This rapid rise in housing prices has created major gaps in

affordable workforce housing that will be difficult to overcome without regional coordination. Current market forces are not likely to meet the need for affordable housing. With limited areas that can be developed due to environmental constraints and rising costs associated with labor and materials for construction, the market is incentivized to develop new homes

### Adirondack real estate boom hasn’t let up a year into the pandemic

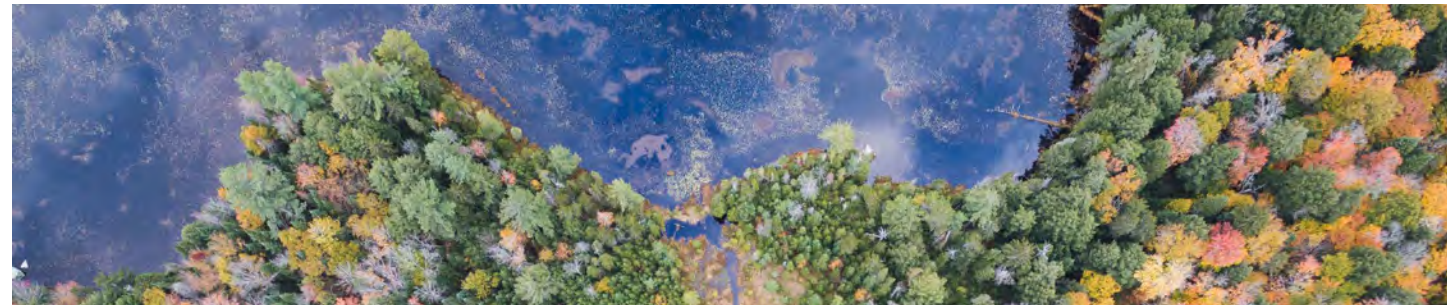
BY ELIZABETH HAYES FOR WOODBURY HILLS, IN ADIRONDACK REGION

July 07, 2021



The average home sales price in the Northern Adirondacks increased 91% between 2020 and 2021, exacerbating an already existing workforce housing shortage.





that can be sold at a premium.

### CURRENT AND POTENTIAL NEW RESIDENTS ARE PRICED OUT

Approximately one-third of households in the region pay more than 30% of their annual income on housing – exceeding the HUD definition of affordable housing. With competition from higher wage earning second home purchasers, the households being priced out include not only those at the lowest income, but also moderate and median income earners: the median home cost is out of reach for a typical employee in at least one of the top five employment sectors in each county. Existing housing programs in the region are largely focused on income-restricted housing and do not address the need for housing for a larger range of income levels. New and innovative solutions to expand housing options for a range of income levels are needed.

### AGING POPULATION CHOOSING TO STAY IN THEIR HOMES LONGER

The majority of seniors currently live in single-family homes and want to stay in their community, but do not have alternate housing to move and age into. This population is looking for single-

## ISSUES

- Increased demand for first and second homes in the region, combined with short-term rentals, have exacerbated housing affordability issues in the region

## OPPORTUNITIES

- Explore creative housing models, including community land trusts (CLTs) and seasonal, transportable pod housing
- Make the most of the increased private sector demand for housing by requiring a portion be allocated for workforce housing

story living with less maintenance, a community feel, and access to amenities. Providing this choice offers an opportunity to free up the single-family housing for new residents.

### INTEREST IN RELOCATING TO THE ADIRONDACKS IS INCREASING

With the increased ability to work remotely, demand for housing in the Adirondacks has increased at an unprecedented pace. Between March 2020 and March 2021, the

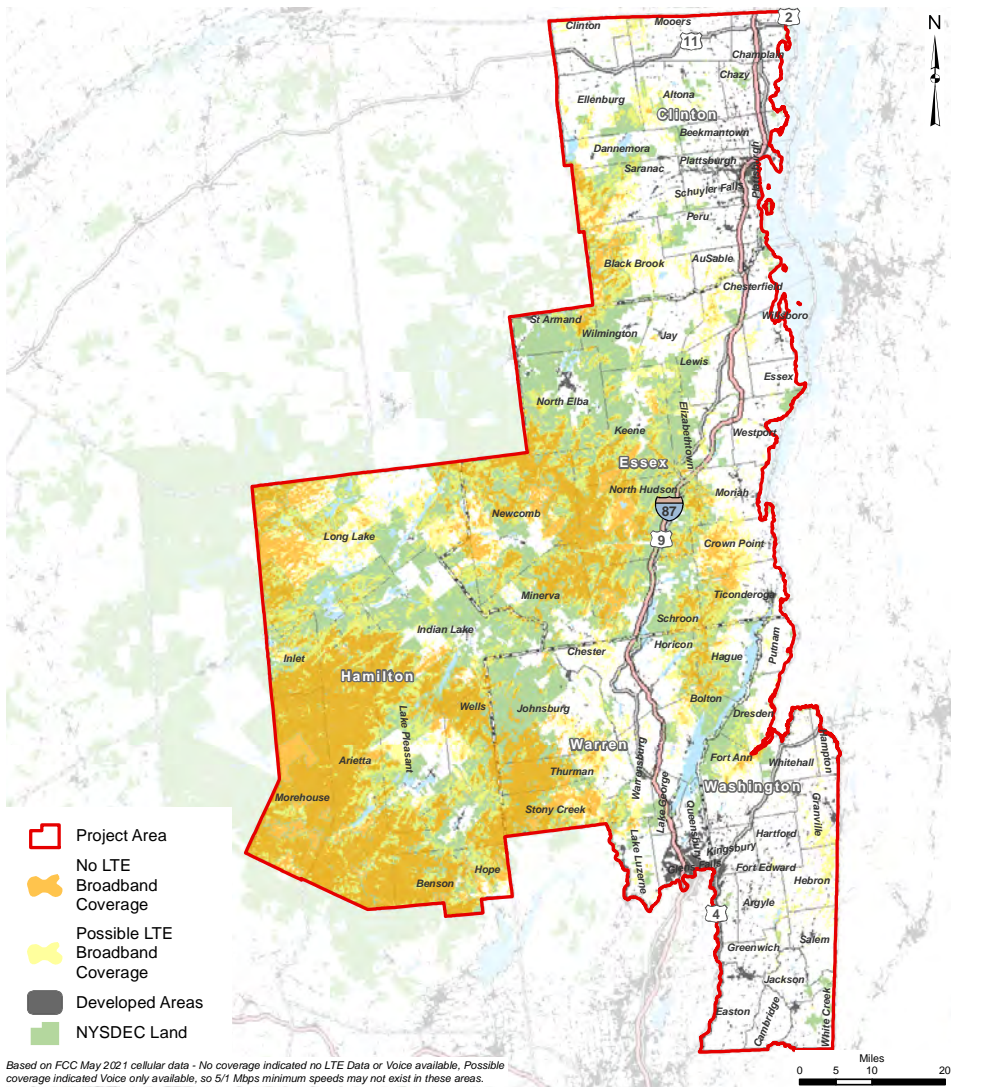
number of home sales in the Northern Adirondacks was up over 53%<sup>2</sup>, resulting in fewer homes on the market than there have been since 2006.<sup>3</sup> And housing demand is not set to let up: a March 2021 Adirondack Relocation Assessment survey commissioned by ROOST and Warren County EDC estimated the demand for housing in the Adirondacks from relocating households at 121,000 units. Opportunities to build on the increased private sector demand for housing in the region should be explored.

# BROADBAND & CELLULAR

Access to broadband and cellular service has been a topic of conversation locally, at the State level, and at the national level for years. What began as a convenience has been transformed by the pandemic into a necessity with the shift to telework, remote schooling, and telehealth. Several conditions have prevented the region from fully addressing broadband and cellular access.

### INFORMATION IS INACCURATE/ UNAVAILABLE

While it is clear that broadband is not universally available in the region, just how many residents don't have access is not known. As recently as January 11, 2021, Governor Cuomo stated in the State of the State address that "98% of the state now has access to broadband." It is clear that this estimate is not reflective of broadband availability in the LCLG Region, but without data to back up this assertion, little can be done. As the FCC noted in their 2019 Mobility Fund Phase II Coverage Maps Investigation Staff Report, "accurate broadband data is essential to bridging the digital divide." The LCLGRP and partner organizations across the region are working to address this data gap, including broadband surveys that are currently underway in Warren and Washington Counties, and plans to initiate a broadband study for Clinton, Essex, and Hamilton Counties.



### HIGH COSTS & LIMITED REVENUE POTENTIAL

Absent major changes, internet and cellular providers have limited interest in expanding services to rural areas; low density translates to low revenue potential, while the high costs of deployment (including right-of-way fees and taxes) remain. Absent financial

incentives, government mandates, or systemic changes, the private market will not fill the service gaps on their own.

Without these market drivers, companies that do offer internet and cellular services in rural areas face little to no competition and little incentive to



invest in improving service. This often means that rural residents' only options for internet and cellular access provide slower and less reliable services at high costs.

**COST OF SERVICE**

Equity must also be a part of the broadband and cellular conversation; while some residents in the region may technically have "access" to broadband, paying for the service may be cost prohibitive. Washington County's 2015 "Broadband and Cell Existing Conditions Report" surveyed over 2,800 County residents, 20% of whom did not have internet. Of those respondents who did not have service, 65% indicated the reason was cost related.

**DIGITAL LITERACY**

In the modern digital economy, having a workforce that is skilled in using technology is critical for maintaining the local economy's resiliency – especially with the rise of remote working because of the pandemic. Rural areas with limited access to broadband and cell services are at a competitive disadvantage because the local workforce is less likely to be exposed to the technologies that drive today's economy. Limited broadband and cellular services also restricts access to the necessary training and resources to become familiar with these technologies, creating few paths forward for reskilling and upskilling.

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**ISSUES**

- Broadband and cellular access are not sufficient, inhibiting businesses, remote schooling, telehealth, and remote workers

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**OPPORTUNITIES**

- Advocate regionally for broadband and cellular improvements, including innovative solutions
- Be prepared with a pipeline of transformative broadband and cellular infrastructure projects for when funding is available



*Low population density creates little market incentive for providing internet and cellular services in rural areas. Filling broadband and cellular service gaps is critical for economic growth.*

# CHILD CARE

**CHILD CARE IN THE LAKE CHAMPLAIN-LAKE GEORGE REGION**

Both regionally and nationally, child care facilities have been closing, as providers age out and centers find it difficult to attract and retain staff, given the profession's limited income potential. Other challenges that existed pre-COVID include the loss of preschool-age enrollment to Universal Pre-K (UPK) and Headstart programs.

Stay at home mandates, the closure of schools, and adapting to remote learning created unprecedented demands on child care. This, coupled with the additional restrictions and regulations on child care facilities and associated financial hardships, have led to the child care crisis the region is facing today. Many child care centers that have remained open are operating at a loss, and many child care providers are opting for early retirement.

While child care providers struggle to survive on their incomes, residents seeking out child care struggle to afford the cost; it is clear that there is a disconnect that cannot be addressed without assistance filling this gap. The child care needs of the region are also inconsistent with availability – including difficulty finding part-time care to assist with hybrid schooling models, care for children under age 2, and care for non-traditional hours needed to meet the needs of the

Child care is critical to maintaining and growing the region's workforce. The absence of accessible, affordable, quality child care disproportionately affects women and the minority and low-income workforce.

**CHILD CARE ALLOWS PARENTS TO WORK**

"Businesses Rely on employees, and employees rely on child care."<sup>4</sup> Without access to affordable, dependable child care, parents are faced with the difficult decision of juggling child care or leaving the workforce, further limiting the region's potential employment pool.

**CHILD CARE INCREASES EMPLOYEE PRODUCTIVITY**

Employees miss five to nine work days each year due to child care problems,<sup>5</sup> yearly lost earnings, productivity, and revenue for U.S. businesses totals \$57 billion when quality, affordable child care is not available.<sup>6</sup>

**CHILD CARE CONTRIBUTES TO THE ECONOMY**

Not only does child care contribute to the economy by providing jobs to providers, access to child care translates to greater career growth for parents, increasing income tax revenue. Investment in child care has been found to increase spending: \$1 invested in child care generates \$1.86 in additional spending.<sup>7</sup>

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**19%**

Decrease in the number of child care providers in the region since 2017

**27%**

Decrease in child care capacity since 2017

**22**

"High Need" towns and cities across the region (defined as having more than 3 children per child care slot and 25% or more of their population is at or below 200% of Federal Poverty Level)

**31**

Towns and cities across the region that have no child care facilities

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region's shift workers and service industry workers, in particular. There are a number of organizations across the region who are actively working to address the current child care crisis, and new initiatives and partnerships have been formed as a result. There is also hope in the increased focus on child care as an essential element of local infrastructure at both the Federal and State level.

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### ISSUES

- Child care demand far exceeds supply, and the availability of child care continues to decline with an aging out workforce, low income potential, high start up costs, and regulatory hurdles

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### OPPORTUNITIES

- Support the agencies that are experts in the child care sector to strengthen their capacity
- Use business-provided child care as a potential workforce attractor, and explore potential new cooperative models to minimize costs to small businesses
- Be prepared with a pipeline of transformative child care infrastructure projects for when funding is available

# TRANSPORTATION

The region's transportation network plays an important role as both an internal connector between workers and workplaces and as an external connector to tourists and markets. While many of the region's primary corridors contain hubs for employment and tourism destinations, the region's more remote areas are more difficult to connect. Innovative solutions were launched during the pandemic that could serve as models.

### LIMITED TRANSPORTATION OPTIONS

Many of the region's residents and workers live in remote areas where

non-motorized transportation is generally not feasible and access to public transportation is extremely limited: only portions of Clinton, Warren, Washington, and Essex Counties have public transportation, and there is no public transportation in Hamilton County. Some of the most remote areas are served only by seasonal roads, making connections to certain areas unreliable during the winter months. A lack of reliable connections between remote populations and employment centers limits local participation in the

workforce and can make recruitment of employees difficult.

### NEW PRIVATE SHUTTLE SERVICE RECENTLY INTRODUCED

The Tech Valley Shuttle Get-To-Work program, with partners, offers rides to/from job training programs, job fairs, job interviews, and daily rides to employment. During the pandemic, Tech Valley Shuttle began operating a shuttle connecting Capital Region employees with employers in the LCLG Region. This services may serve as a model for future services to fill transportation gaps in the region.



*For much of the region, driving is the only option to travel to work, school, and the supermarket.*

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### ISSUES

- Inadequate transportation infrastructure further limits the potential workforce pool and, for those with no other options, long distance commuting

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### OPPORTUNITIES

- Build on recently launched innovative solutions
- Be prepared with a pipeline of transformative transportation infrastructure projects for when funding is available



# WATER & WASTEWATER

## EDITORIAL: Preserve region's economy by preserving water quality in Lake George

Jun 10, 2021



Adequate water and wastewater infrastructure is a key driver of economic development and crucial to preserving the quality of the region's natural assets

Water and sewer infrastructure has always been a key driver to economic development, but with lagging investment in infrastructure and pandemic-exacerbated strains on local economies, improving and expanding water and sewer infrastructure has become increasingly more difficult.

### ECONOMIC BENEFITS OF INFRASTRUCTURE

### IMPROVEMENTS

Residents and small businesses in the region that do not have access to or adequate water and sewer infrastructure are left to foot the bill to make high cost, on-site improvements to address the inadequacies. The economic benefits of infrastructure improvements cannot be undervalued: the Congressional Budget Office estimates that every dollar spent on infrastructure results in an economic

benefit of \$2.20.<sup>8</sup>

### WATER & SEWER INFRASTRUCTURE IS A DRIVER OF DEVELOPMENT

Access to water and sewer infrastructure is an important consideration for development within the region's population centers. The lack of facilities in the more rural areas of the region has resulted in new development focused around existing communities that possess proper facilities. Industrial and commercial properties without water and sewer sit vacant, unable to attract business anchors, while demand for space at industrial parks served by infrastructure outpaces supply. Expanding water and sewer opens up small lots for building affordable or single-family housing, making these needed residential projects more economically feasible. Decentralized wastewater treatment systems, which treat and dispose or reuse effluent close to the source, can be a smart alternative to minimize large capital costs.

### ADEQUATE INFRASTRUCTURE IS NEEDED TO PROTECT THE REGION'S NATURAL ASSETS

Ensuring the adequacy of wastewater and stormwater infrastructure is also

paramount to preserving the quality of the region's environmental assets. A 2020 study by the FUND for Lake George found that approximately 6,000 homes and businesses around Lake George rely on private septic systems, 4,000 of which are old or neglected and, as a result, at risk of contaminating the lake. Negative impacts to lake water quality can impact the economy, driving down property values, employment, and tourism.<sup>9</sup>

### REGIONAL WATER & WASTEWATER INFRASTRUCTURE NEEDS

There is no comprehensive inventory of the LCLG Region's water and wastewater infrastructure needs. Inventories are typically limited to those municipalities that opt to participate and provide information to the New York State Environmental Facilities Corporation (EFC), a public benefit corporation that provides low-cost capital and grants for water quality improvement projects. NYSEFC annually prepares an Intended Use Plan (IUP), which provides information about projects that are eligible for financial assistance. Based on the current (2020-2021) IUP it is estimated that water and wastewater infrastructure needs in the region total over \$430 million. Additional outreach to water and wastewater districts and municipalities was conducted in 2021, which identified some additional needs. More work is required. With the \$1 trillion Federal Infrastructure Bill making its way through Congress at the time of this writing, it is crucial that the region be prepared with a comprehensive list of infrastructure needs and priority projects.

### ISSUES

- Aging water and sewer infrastructure places additional financial burdens on municipalities faced with the decision of making the improvements, raising rates, and potentially driving out investment
- Much of the region has no water and sewer infrastructure, stymieing larger scale investment, in addition to raising environmental/water quality concerns

### OPPORTUNITIES

- Make use of Federal and State funding to address aging water and sewer infrastructure and support new development and density in these areas
- Be prepared with a pipeline of transformative water and wastewater infrastructure projects for when funding is available

### LCLG REGION'S INFRASTRUCTURE NEEDS (NYSEFC IUP)

County	Water Infrastructure Projects		Wastewater Infrastructure Projects	
	Number	Dollar Value	Number	Dollar Value
Clinton	14	\$70,658,826	34	\$95,742,087
Essex	12	\$52,151,337	23	\$46,404,126
Hamilton	1	\$748,753	4	\$6,577,061
Warren	20	\$60,899,577	25	\$28,215,550
Washington	10	\$57,569,186	15	\$12,321,944
LCLG Region	57	\$242,027,679	101	\$189,260,768





## COMPETITIVE ASSETS

Beyond the foundational infrastructure, the LCLG Region has a number of competitive assets that are unique to the region and that can be built upon.

### *STRATEGIC LOCATION ALONG THE CANADIAN BORDER*

The LCLG Region is strategically located on the Canadian border and the main highway leading from the US to Montreal. The northern portions of the region – in particular, Plattsburgh – have been building on this unique location, positioning itself as the “suburb of Montreal.” The U.S.-Canadian border was closed to leisure travel for more than 18 months, beginning on March 21, 2020. At the time of this writing, Canadian leisure travel to the U.S. is still not permitted. And while this ensures that freight can cross the border, the border closing continues to have implications for company executives who would typically travel freely between the U.S. and Canada to meet stakeholders, visit a new site, or check in on manufacturing operations.

### *SPIRIT OF RURAL ENTREPRENEURSHIP*

Entrepreneurial spirit and rural self-reliance go hand in hand; the LCLG Region’s residents are keen to adapt and redefine their local economies in a time of rapid change. Small businesses and entrepreneurs will be a critical driver of economic recovery, growth, and resiliency for the region. Therefore, it will be important to understand the needs of small businesses who are driving job growth and new job creation, as well as how to better connect, strengthen, and broaden the entrepreneurial ecosystem to reinforce a culture of entrepreneurship throughout the region’s economy.

### *INCREASED COLLABORATION ACROSS THE REGION*

A silver lining of the past year has been the increased communication and collaboration that occurred across the region. Businesses set aside their differences and worked together with competitors toward shared goals, whether that meant assistance getting vital PPE, sharing workers, rolling out the COVID-19 vaccine, monthly tourism roundtables, or initiatives like Forward Together. Businesses and organizations understood the importance of thinking regionally and advocating for shared needs at a regional level. These conversations should not stop with the end of the state of emergency.

### *SUPPLY CHAINS*

The COVID-19 pandemic has revealed

weaknesses and instabilities in supply chains of industries that are reliant on international imports. As individual countries had - and continue to have - varying levels of outbreak, policies surrounding travel and trade restrictions become unpredictable, leading to disruptions in a company’s supply chain. Key industries in the LCLG Region with the potential to fill supply chains with significant international trade exposure are manufacturing, including plastics, medical instrument supplies, value-added agriculture, and transport manufacturing; and paper mill-related sectors.

### *ISSUES*

- Border closure has resulted in economic impacts in the northern portion of the region, including reduced tourism and reduced economic activity (e.g., site visits)

### *OPPORTUNITIES*

- Support the strong rural entrepreneurship of the region through additional Stage 2/accelerator services
- Continue and expand collaboration as a means to share ideas and resources, and work collaboratively as a region
- Support private sector in their efforts to regionalize relevant supply chain components, where appropriate





# KEY SECTORS

**10.5%**  
Percentage of the region's GRP

**14.1%**  
Percentage of the region's jobs

**+328**  
Jobs added in the sector (2015-2020)

Health care is the LCLG Region's second largest employment sector and the third largest contributor to the region's GRP. Health care accounts for a significant proportion of jobs in every county except Hamilton County, where the health care and social services sector accounts for just 2.2% of employment. The sector added the second most jobs of any sector in the region between 2015-2020, trailing only government employment. Despite these gains in employment, the pandemic has strained the region's health care sector, revealing new issues and opportunities.

**SHORTAGE OF HEALTH CARE WORKERS**  
Even before the pandemic, attracting medical professionals has been an issue for much of rural America. Based on NPR reporting, "only 1% of doctors in their final year of medical school [...] want to live in communities under

# HEALTH CARE

10,000; only 2% want to live in towns of 25,000 or fewer."<sup>10</sup> In the LCLG Region, all five counties are in designated Health Professional Shortage Areas (HPSAs).<sup>11</sup> Incentive programs, such as Doctors Across New York, are working to address this need in rural New York, but with a worsened workforce crisis across all sectors, the region's health care industry remains more challenged than ever.

**UNIQUE PATIENT POPULATIONS**  
The health care needs of the LCLG Region are unique, with a large population of elderly and chronically ill residents, both of which require specialized care and treatment from medical facilities and staff. Additionally, several correctional facilities in the region contribute to a large prison population whose medical needs are unique. The region's popularity as an outdoor recreation tourist destination means that tourists may require

emergency medical services and can strain emergency medicine facilities.

**GEOGRAPHIC CONSTRAINTS & SHIFTING PATIENT NEEDS**  
The LCLG Region's population is spread over a large geographic area with many areas that are difficult to reach or isolated from transportation options. These challenges require unique approaches to ensure patients have continuity of care. As the pandemic impacted the nation, patient needs in the LCLG Region shifted towards an increase in psychiatric care, an increase in interest in telemedicine and mobile health care vans, and a shifting public preference away from larger centralized hospitals towards smaller local facilities. Many health care providers are working to adapt to these changes; however, the region's health care infrastructure is aging, and it is difficult to receive the necessary attention or funding at small regional hospitals to change with the times.

**ISSUES**

- The region faces chronic health issues and growing mental health needs that have been exacerbated by the pandemic
- Hospitals in the region have difficulty getting the attention and funding needed to upgrade aging hospital infrastructure

**OPPORTUNITIES**

- Plan for shifting demand for new types of care, including new services and new models (e.g., telehealth and mobile providers)



## AGRICULTURE



While representing less than 5% of the region's jobs and GRP, agriculture is the region's most concentrated sector.

### ISSUES

- Production costs continue to rise, with limited potential to raise prices for commodity products
- There is a shortage of meat processing facilities across the region and little incentive for existing operations to expand
- Limited borrowing capacity to invest in technology upgrades
- Without succession plans, aging farmers are selling their land, resulting in a loss of agricultural land

### OPPORTUNITIES

- Tap into growing demand for locally produced products
- Expand agritourism offerings
- Grow new models of product delivery, including online sales and delivery CSAs
- Increase processing facilities and explore improvements to meat processing regulations
- Increase collaboration as a means to minimize costs and increase distribution

The agriculture/forestry/fishing sector is the LCLG Region's most concentrated sector, relative to the national level (i.e., represents a much larger percentage of regional employment), with the highest concentrations in Clinton and Washington Counties. However, employment in the sector has decreased over the past 5 years (by 6%). The pandemic put additional pressures on the agricultural sector, while also opening up new opportunities.

### CONSUMER & MARKET SHIFTS

With school and restaurant closures during the pandemic, many agriculture businesses were forced to increase direct to consumer retail sales (e.g., online sales, direct sales at farmers markets and events/fairs, and delivery CSA models) to make up for the wholesale market dip. Many agricultural businesses adapted, learning new technologies on the fly and further highlighting the importance of broadband and cellular access.

### INCREASED COSTS & SUPPLY CHAIN DISRUPTIONS

The shift from wholesale to retail during the pandemic brought increased costs and supply and production demands, from egg cartons to meat processing. The producers were still producing, but there was a bottleneck and additional costs getting the products to consumers. With sales

prices for commodity products limited, these increased production costs further squeezed the bottom line for the region's farmers. Entrepreneurs in the region are beginning to realize the gaps that could be filled locally to meet local demand, with a new 25,000+ SF

food processing plant currently in the planning stage in Washington County.

### GROWING AGRITOURISM

Agritourism expanded in the region, representing a growth opportunity in

the region's strong tourism market. Farms and producers pivoted to take advantage of the increased interest in outdoor experiences, including pick-your-own farms and farm craft beverage producers.

## TOURISM: HOSPITALITY & DESTINATIONS

Tourism has historically been a key driver of the region's economy. A 2019 Tourism Economic report found that 19% of total employment in the Adirondacks is generated by tourism and total 2019 visitor spending in the Adirondacks was \$1.5 billion.<sup>12</sup>

### RECORD LEVELS OF TOURISM

The COVID-19 pandemic led to record levels of tourism in the region. New visitors discovered (or rediscovered) the area, drawn to the region's

multitude of outdoor recreation offerings, all within a few hours drive of the northeast's metropolitan centers. Despite the closing of the Canadian border at the outset of the pandemic, the overall number of visitors to the Adirondack Park remained consistent with previous years, indicating a significant increase in American visitors.<sup>13</sup> With many of these new visitors coming from in-state locations like Albany, New York City, Syracuse, Rochester, and Buffalo, the region must prepare to continue accommodating these new visitors in addition to

the typical Canadian market when borders fully re-open. There are also opportunities to support efforts to increase the diversity of visitors to the region and to build a more equitable, inclusive tourist landscape.

### UNEVEN DISTRIBUTION OF TOURISM DEMAND & AMENITIES

While the region as a whole experienced record levels of tourism, the demand was not consistent across the region. Unprecedented demand

# 19%

Percentage of the region's total employment that is generated by tourism

# \$1.5

Billions of tourist spending in the Adirondacks



Tourism represents a significant portion of the region's economy and has only grown over the past year.



ISSUES

- Tourism demand and associated amenities are not evenly distributed throughout the region, causing overcrowded conditions in some areas and lack of customers/visitors in others
- The shift to more impulse travel to the region is harder to plan and staff up for

OPPORTUNITIES

- Grow lodging offerings, including new models to meet shifting consumer preferences
- Increase tourism diversity and the diversity of offerings to meet their needs
- Extend the tourism season, working towards a year-round model
- Address pent up demand for entertainment offerings
- Continue to develop innovative solutions to better connect the region's outdoor recreation destinations to downtowns and less frequented trails

at certain trailheads led to closures to protect them from overuse, while other parts of the region – particularly Clinton County – saw boats sit idle in Lake Champlain due to the US-Canada border closure. This uneven distribution is not a new phenomenon: in 2019, 75 percent of Adirondack visitor spending was in Warren and Essex Counties, while only 5 and 10 percent, respectively, was in Hamilton and Clinton Counties.<sup>14</sup>

SHIFT IN TOURIST DEMOGRAPHICS

The Canadian border closure and decrease in international and long distance travel brought new and different tourists to the region. These tourists tended to be younger, impulse travelers that made last minute, online reservations for hotels, restaurants, and amenities. New, less experienced hikers were looking for a greater range of tourism offerings. Many of these

*Entering the pandemic, jobs in the region's retail, accommodation, & food service industries were stagnant. The pandemic had significant implications, with a 14% loss in jobs in these industries between 2019 and 2020. As the economy opened back up, the rate of job loss slowed dramatically, but the most recent labor market data shows a 1% loss between 2020 & 2021. There are now over 4,400 fewer jobs in these industries than there were in 2014.*

hikers rely on applications like AllTrails to navigate the region's trail networks, which can create challenges in remote areas with no broadband or cellular service. Planning for these types of visitors will help ensure their safety and continued patronage of the region's businesses and recreational assets.

FROM ONE SEASON TO YEAR-ROUND TOURISM

The LCLG Region is typically considered a summer tourism destination, but the seasonality of tourism in the region has been shifting: hotels that are typically quiet in the winter months reported record numbers in the winter of 2021, ski mountains have expanded their offerings to include non-winter activities, and fairgrounds have increased their year-round events to meet the growing demand.

platform was difficult for businesses located in areas with limited broadband and cellular services. Additionally, not all businesses had the necessary staff or expertise to rapidly adapt to a new economic model.

REFILLING LOST RETAIL POSITIONS

Taxable sales and purchases in summer 2020 surpassed 2019 levels in the region and New York State thanks, in

part, to a transition towards online sales during the pandemic. Even with the success of online retail, which allowed many businesses to continue operating with fewer employees, the need to refill positions lost during the pandemic is evident in regional job postings. Retail salesperson and retail supervisor positions were the 3rd and 4th most posted positions in the region from December 2019-2020 (a combined 3,442 job postings). Despite the availability of positions and high unemployment in the sector, small business owners are struggling to recruit and retain low wage staff. Without sufficient staff, some restaurants limited their capacities or hours. While a necessary measure to ensure what staff they did have did not burn out, these adaptations hurt businesses' revenue potential and reduced services available to consumers and tourists.

INCREASED COLLABORATION, BUT MORE STILL NEEDED

The spirit of collaboration was strong in the region's retailers and restaurants. Bars with ample patio space began offering food from neighboring restaurants. Collectively faced with a workforce shortage, some restaurants worked together to modify their operating hours, allowing the sharing of workforce and ensuring they could even partially remain open. More collaboration and connections is needed, though, particularly between the region's small retail and restaurants and tourist destinations. Many tourists are looking for these services when searching for places to stay, but there are opportunities to increase connections between tourist destinations and the small businesses that exemplify the region's main streets.

RETAIL & RESTAURANTS

The region's retail and restaurants are vital to not only serving the residential and worker population, but also to support the tourism sector.

IMPACTS OF THE DIGITAL DIVIDE

When many of the region's retailers and restaurants were forced to shutter, they sought out new methods to get out

their products. For many businesses, the transition to online sales during the pandemic was a lifesaver. However, not all businesses were able to adapt so easily. The transition to a digital sales

ISSUES

- Increasing difficulty filling minimum wage service sector jobs
- Hesitancy/lack of ability to fully embrace social media and/or online retail options

OPPORTUNITIES

- Retain and grow the new markets and customers established over the past year
- Invest in digital applications to allow businesses to continue operating with fewer employees
- Better connect region's small businesses (retail, restaurants) to tourist destinations
- Continue to build on retail density

9.8%

Percentage of the region's GRP

12.9%

Percentage of the region's jobs

-478

Jobs lost in the sector (2015-2020)



# MANUFACTURING

The role of manufacturing in the region has shifted but remains vital and growing.

## PAPER MANUFACTURING LEGACY

Much of the LCLG Region has historically been known for its logging and pulp and paper industries. Today, International Paper remains a significant landowner in the Adirondacks and their Ticonderoga mill has over 600 employees. While paper and pulp mills remain the most concentrated manufacturing industry in the region, there has been a significant (22%) job loss in the industry over the 2015-2020 period. There are opportunities to build on the legacy of the region's paper and pulp industries

and the resources that are already present in the region.

## GROWING MANUFACTURING HUBS

The LCLG Region is home to two significant and growing manufacturing hubs: a transportation manufacturing hub in and around Plattsburgh, in Clinton County, and a medical device and life science hub in Warren County. There are opportunities to continue to support and expand these manufacturing hubs.

## SECTOR MISCONCEPTIONS

A shortage in the available workforce for manufacturing has been an

ongoing issue for the sector, even prior to the pandemic. Misconceptions about industrial jobs and a lack of understanding of the opportunities that exist in high-tech manufacturing environments are often cited as one of the reasons. The growth and revenue potential of manufacturing is notably often overlooked: within the LCLG Region the average earnings per job in manufacturing is over \$76,000, 33% more than the average earnings for all jobs in the region. Manufacturing employment goes beyond the traditional hard labor and also includes high-tech innovation, the arts, and sustainable design. Outreach to high school students is being done to communicate these opportunities and teach the necessary skills for a successful career in manufacturing.



# MOVING THE REGION'S ECONOMY FORWARD, TOGETHER

Diving into the issues and opportunities that the region faces today shows the need to not just recover from the economic disruption caused by the pandemic, but to address the underlying challenges that have long existed in the region in order to grow the economy.

To grow the economy beyond where it stood in February 2020, the region can collaborate to face problems at a regional level, understanding that county lines mean little for residents and visitors. Planning and action on the regional level is needed to increase local capacity and to remain competitive.

The increasing workforce challenges the region faces, paired with the growing prevalence of remote working, show the need to focus on projects that put the people of the region first, ensuring that residents and workers have access to the basic services they

need and amenities they deserve.

A multi-faceted approach is needed that anticipates the industries with the greatest opportunity to emerge from COVID-19 in the region and fosters an environment that supports business creation. This will help the LCLG Region not just return to status quo but capitalize on emerging opportunities coming out of this economic and public health crisis and be more resilient in the future.

Priorities must be forward-looking and anticipate future needs of the region's economy. Creating lifelong "careers" with opportunities for growth (and not just "jobs") will strengthen opportunities for individual prosperity and business success.

Priority projects to move the region's economy forward are identified on the following pages and are generally organized around six economic

imperatives:

- **Connecting Our People:** ensuring that residents, businesses, and visitors have adequate infrastructure
- **Child Care Access:** supporting and growing this critical need
- **Housing Access & Stability:** ensuring that this basic human right is accessible for the region's residents, workers, and new/prospective residents
- **Main Street & Community Centers as Economic Engines:** increasing downtown economic development capacity
- **Entrepreneurial Ecosystem Building:** supporting and growing the region's entrepreneurial spirit
- **Career Building & Skills Training:** adapting regional workforce training

**15.9%**  
Percentage of the region's GRP

**9.1%**  
Percentage of the region's jobs

**157**  
Jobs added in the sector (2015-2020)

### ISSUES

- Misperceptions about manufacturing jobs reduces potential workforce pool
- Reduction in cross border activity diminishing the capacity to showcase and expand manufacturing clusters in the region
- There is a regional disconnect between demand and availability of turn-key manufacturing sites with infrastructure

### OPPORTUNITIES

- Expand existing, established manufacturing clusters, including the transportation cluster in Clinton County and medical device and life science cluster in Warren County
- Target growth potential manufacturing subsectors
- Plan for growing downstream demand



# CONNECTING OUR PEOPLE

The LCLG Region’s ability to connect its residents to each other and outside communities through its physical infrastructure will be a critical driver of economic development. This initiative is about taking a regional approach to improve access to water and sewer, broadband and cellular services, and transportation networks.

## 1 PRIORITY PROJECT: DEVELOP A REGIONAL TELECOMMUNICATIONS PLAN & PROJECT DEVELOPMENT STRATEGY

The LCLGRP is currently working to map broadband and cellular infrastructure availability throughout the five counties and create a regional implementation plan. In the first phase of the project, a working group convened by the LCLGRP will hire a telecommunications propagation engineering firm to identify broadband and cellular coverage gaps in the region, including where there is no coverage and limited service providers available. The plan will evaluate potential sites and technologies to fill these gaps, coordinate with local and State agencies, particularly the Adirondack Park Agency, on visual resources and other environmental impacts, and map areas and sites where new telecommunications infrastructure would solve coverage challenges. Technologies to be assessed would include both small cell 5G and traditional tower infrastructure, as well as the feasibility of vertical and

horizontal co-locations between carriers. In the second phase of the project, the working group will retain a firm to coordinate with landowners of the sites identified in phase one and seek the entitlements necessary for the prescribed telecommunications infrastructure. During this phase, the working group will also coordinate with decision makers to be prepared for federal infrastructure funds and seek the financial incentives necessary, including grants, to make the permitted projects economically viable. Once landowner agreements are secured, the infrastructure permits are in place, and financial incentives are identified, the working group will market the pilot projects to developers and carriers to bring the infrastructure to fruition, thus filling coverage gaps. One such pilot project is identified in Recommendation 3 on the next page.

### KEY NEXT STEPS

1. Convene a regional telecommunication working group
2. Retain a telecommunications propagation engineering firm to prepare the plan
3. Identify broadband and cellular gaps in the region
4. Evaluate potential sites & technologies to fill gaps
5. Coordinate early and often with decision makers to understand how federal infrastructure funds will be used
6. Identify priority projects and prepare necessary due diligence and permits for their implementation
7. Secure grant funding
8. Market priority projects to developers and carriers
9. Launch pilot project(s)

## 2

### DEVELOP A REGIONAL WATER & WASTEWATER NEEDS ASSESSMENT & STRATEGY

Water and wastewater infrastructure needs continue to grow and are routinely underfunded. To build a case for funding the region’s water and sewer needs, the LCLGRP will lead the preparation of a regional water and wastewater assessment and strategy. This action is the critical first step needed to identify priority projects to serve existing needs and provide opportunity for housing and economic development, to assist local governments with their capital improvement planning, and to increase awareness of available funding opportunities. This first step action, which has been initiated as part of the Economic Resiliency Plan outreach, is key to identifying potential decentralized wastewater systems and exploring potential regional sewer districts or collaborative means to reduce costs and improve operating efficiencies.

## 3

### LAUNCH A PILOT BROADBAND DEPLOYMENT & SMALL CELL CELLULAR PROJECT

Addressing the gaps in broadband and cellular service in the region requires innovative solutions. One such solution is tying broadband and cellular deployment together through a pilot project that would combine the installation of much-needed broadband

infrastructure with new small cell cellular technology. This innovative solution would help to address one of the key barriers to private sector broadband deployment in the region: a revenue model that is based solely on residential (demand) density. In turn, the broadband infrastructure installation would reduce upfront costs associated with small cell cellular technology.

## 4

### IDENTIFY AREAS WHERE TRANSPORTATION HINDERS WORKFORCE PARTICIPATION & EXPLORE FEASIBILITY OF NEW TRANSPORTATION OPTIONS

Like much of the country, many employers in the LCLG Region are facing a workforce shortage. In this largely rural, expansive region, the absence of public transportation further limits the potential workforce pool. The private sector has begun to address this need with the launch of new shuttle service that brings employees from the Capital District to the Lake George region to fill tourism-related summer job openings; however, this is just one job market and one locale in a region that as a whole is facing larger workforce shortages. The LCLGRP’s recently launched BRE program presents an opportunity to better understand employer’s transportation needs, providing the data crucial to any future workforce transportation initiative. The LCLGRP will use their BRE program to solicit information specific to this issue to better inform future transportation projects.

## DEFINITIONS

### Decentralized wastewater system:

Convey, treat, and dispose or reuse wastewater from small and low-density areas. Unlike centralized systems, the treatment and disposal (or reuse) of the effluent is close to the source of generation.

### Small cell cellular technology:

Small wireless transmitters and receivers that can be placed on structures such as streetlights, buildings, or poles. The cost advantages of small cells compared with macro cells (typical cell towers) make providing coverage to smaller communities more feasible.



# CHILD CARE ACCESS

Similar to national trends, the COVID-19 pandemic has exposed gaps in child care options for communities in the LCLG Region. Limited access to child care options makes it difficult for parents to participate in the workforce. Child care is critical to maintaining and growing the LCLG Region's workforce. This initiative is about enabling a robust child care network, empowering child care providers to run successful operations, and increasing access to child care options for the region's residents.

*We must SUPPORT, GROW, and RETAIN child care access in the region*

## 5 PRIORITY PROJECT: ESTABLISH A STAFFED FAMILY CHILD CARE NETWORK

Operating a successful child care facility requires financial and business skill sets that place additional burdens on child care providers, particularly small providers that may not have resources for support staff to assist with operations. Opportunities Exchange, a national non-profit consulting group focused on the business of early care and education asserts that the weak home child care business model "results in inadequate income for the provider owner, coupled with isolation that increases stress and reduces job satisfaction."<sup>15</sup>

To better support the 171 home child care providers in the region, the LCLGRP will seek to secure funding to establish and maintain a staffed family child care network (SFCCN). These networks provide a number of services and supports to home child care providers, including operational support for things like billing and scheduling, ensuring that

more child care providers are able to run a successful business and remain open. Providing these services also eliminates barriers to entry for new child care providers by removing the need to learn the financial and business side of the industry so new child care providers can focus on caring for children without the added stress of business operations.

The LCLG Region is served by three child care resource and referral agencies (CCRRs) that will be valuable partners in this effort. The CCRRs have established, trusting relationships with the home child care providers in the region addressing some of the apprehensions providers may have in "sharing their books" with an outside entity. The key will be framing the project as a service to help providers modernize their business.

The Early Care & Learning Council and Opportunities Exchange can

both provide technical expertise in developing the SFCCN. These entities will coordinate with the CCRRs to identify the services to be provided and the appropriate child care management software system.

### KEY NEXT STEPS

1. Coordinate with the three CCRRs in the region to better understand provider needs, potentially through a BRE survey
2. Identify services to be provided by the SFCCN and services to be shared with the CCRRs
3. Select the appropriate child care management software system
4. Recruit home child care providers to be a part of the SFCCN
5. Obtain funding and hire one SFCCN staff person for each of the region's CCRR (estimated total cost \$210,000 annually).



Sound Child Care Solutions (SCCS) is a non-profit organization and consortium of seven early childhood education centers sharing administrative services in a central office in Seattle. Founded in 2006 with the assistance of Kellogg Foundation funding, the organization now serves more than 450 children in 11 locations with 24 classrooms. SCCS serves all centers to diversify revenue streams and subsidize service of low-income families to ensure all children receive high quality early childhood education. The central office manages benefits administration, payroll, accounts payable, liability insurance, budgeting, financial reporting, contracts management, fund development, strategic advising, and IT consulting.

## 6

### RECRUIT, TRAIN, & OPEN MORE HOME-BASED CHILD CARE

A coordinated effort to develop the child care provider workforce and eliminate barriers to entry for new child care providers is critical for opening new child care facilities and filling gaps in the current child care marketplace. Expanding access to the required training to become a child care provider will empower job seekers who may have an interest in early childhood education to meet the market demand for child care. Additionally, assisting those who are interested in becoming a self-employed child care provider with upfront training costs will enable new child care providers to locate in communities in need. LCLGRP will coordinate with regional stakeholders to expand child care training opportunities and provide financial assistance for prospective child care providers to receive required training.

## 7

### SUPPORT REGIONAL ADVOCATES IN THEIR EFFORTS TO INCREASE CHILD CARE PROVIDER REVENUE POTENTIAL

The LCLG Region has strong advocates working to address and improve regulations and standards for child care providers in the region. This includes advocating to increase the location-based market rate vouchers providers receive for children on public assistance, to ensure that providers are paid a fair rate for their services. This also includes identifying and advocating for new and innovative approaches that address the imbalance between the age where demand is typically highest (under 2) and where slots are most often available (over 2). LCLGRP will continue to support the efforts of these advocacy organizations.







## HOUSING ACCESS & STABILITY

Housing is a critical component in communities that are vibrant and resilient. The LCLG Region’s ability to support business development is tied to where and how people can find homes in the region. This initiative is about having a regional champion and strategies to address housing.

### 8 PRIORITY PROJECT: ESTABLISH A REGIONAL COORDINATION GROUP & CHAMPION FOR HOUSING

Access to housing is a regional issue. Multiple jurisdictional boundaries complicate matters, and historically underfunded state efforts and conventional approaches are not working. This issue requires active intervention and leadership over the

long haul and collaboration across the five counties.

The LCLGRP will leverage its position as a regional entity to establish a working group that actively monitors regional housing trends, champions the

housing needs of current residents, and coordinates with regional stakeholders to address housing challenges to ensure stability in the regional housing market.

The regional Coalition or Coordinating

Group will be established to highlight the region’s housing needs, identify strategies to address aging housing stock, availability, and affordability, advocate and adopt practices that incentivize alternate housing styles (accessory units, tiny house/cottage colonies, higher densities) and champion this as a regional economic

development issue.

#### KEY NEXT STEPS

1. Compile list of regional housing providers and stakeholders
2. Contact & recruit regional housing providers and stakeholders to participate in the Coordinating Group

### 9 PRIORITY PROJECT: DEVELOP A REGIONAL HOUSING ASSESSMENT & STRATEGY

The first task of the regional housing coordination group will be to prepare a housing assessment and strategy to understand the factors that impact the housing market and develop strategies that meet the region’s housing needs, while adapting to challenges and leveraging regional assets. This action is a critical early step to identify priority projects, regional housing needs, and implementation strategies.

The strategies must be progressive, creative, and entrepreneurial, including exploring new models and forms of housing to address changing needs, reduce costs, and cater to our workforce and new residents. The assessment will explore new tools that are available, such as tiny houses, land banks (Recommendations #10), dormitory housing, and co-housing.

Work on the Regional Housing Assessment & Strategy is set to begin in 2022 and be completed by 2023.

#### KEY NEXT STEPS

1. Issue an RFP for the regional housing assessment & strategy
2. Select consultant to prepare the regional housing assessment & strategy
3. Engage with the APA, local leaders, lenders, and builders throughout the process

The LCLGRP was recently awarded \$160,000 in grant funding through the NYS Northern Borders Regional Commission’s (NBRC’s) Economic & Infrastructure Development (EID) Investment Program to kick-start this priority project. The EID-funded plan will include:

- An inventory of available median income housing and rental units;
- An economic analysis of unmet housing needs; and
- A strategy for addressing identified issues.

Achievable housing differs from affordable housing by allowing more development flexibility and accommodating more moderate-income households, while still increasing the availability of homes that are affordable to year-round residents.

While definitions of achievable housing vary, it is generally meant to incentivize development of housing that is affordable for households near or below the area median income (AMI). This approach may be appropriate in the LCLG Region, which experiences significant external pressure for luxury housing, second homes, and vacation rentals. The following definitions from the 2021 Town of Keene, NY Strategic Plan show the slight variation in affordable and achievable housing.

- Affordable housing: Year-round homes with household incomes no greater than 80-120% of AMI.
- Achievable housing: Year-round homes with household incomes of 80-150% of AMI.



## 10 PRIORITY PROJECT: CREATE A LCLG REGIONAL LAND BANK

New York’s land bank program was established in July 2011 with the enactment of Article 16 of the New York State Not-for-Profit Corporation Law (the Land Bank Act). The program is overseen by NYS Empire State Development (ESD) and permits tax districts - as defined by the State’s real property tax law - to create land banks. Land banks are not-for-profit corporations whose purpose is to facilitate the return of vacant, abandoned, and tax delinquent properties to productive use through real property acquisitions, elimination of harms and liabilities, and sales. Bringing vacant or abandoned properties back into productive use is a critical and cost-effective method of improving housing access and stability.

As a governmental organization with the ability to foreclose on properties, the LCLGRP can take on a key role in the operation of a regional land bank. However, because it is not a tax district, it is not eligible to be the lead organization to apply for the creation of a regional land bank through ESD. To create a regional land bank, it will be critical for LCLGRP to identify one or more partner municipalities to execute an intergovernmental cooperation agreement and take the lead on the application process to form the land bank. Once the regional land bank is formed, the LCLGRP can actively work with all municipalities within its jurisdiction to cooperate with the land bank regardless of each municipality’s member-status with the land bank

(refer to BENLIC case study on the following page).

### KEY NEXT STEPS

1. Initiate conversations with potential partner municipalities & ESD
2. Prepare & execute intergovernmental cooperation agreement
3. Prepare & submit land bank application
4. Continue municipal outreach to identify vacant/abandoned properties



The Buffalo Erie Niagara Land Improvement Corporation (BENLIC) is a government created not-for-profit land bank formed in 2012 as a partnership between Erie County and the City of Buffalo. BENLIC works with all Erie County municipalities to strategically acquire tax-delinquent and abandoned property for future use. Within its jurisdiction, there are 25 towns, 16 villages, 3 cities, and a wide variety of taxing districts. While BENLIC typically acquires residential properties, it is not limited by property type, size, or scope. Once BENLIC acquires a property it works

to ensure all properties are brought to local code compliance and livable condition; a property may be demolished if it is determined to be in such a state of disrepair that rehabilitation is unfeasible. The land bank’s Board of Directors authorizes the acquisition, sale, or lease of all properties and consists of public employees from municipalities within BENLIC’s jurisdiction. The land bank’s bylaws prohibit it from acquiring any real property over the written objection of a municipality’s Mayor.

### NON-MEMBER MUNICIPALITY COOPERATION

While Erie County and the City of Buffalo are the member municipalities of BENLIC, the land bank cooperates with all municipalities in the county through its Request for Foreclosure program. Through this program, BENLIC provides sample resolutions for non-member municipalities within Erie County to participate in land banking activities. Once a city, town, or village adopts the resolution, it may request that the County transfer the tax lien on a tax-delinquent property within its jurisdiction to the land bank so the land bank can foreclose on the lien. Alternatively, the land bank may accept a deed in lieu of foreclosure on the property and it may convey the property to the requesting municipality in exchange for payment of the amount of the lien, including interest, costs, and penalties. This process allows non-member municipalities to utilize the land bank’s ability to acquire vacant, abandoned, and tax delinquent properties as they see fit.

### PAY IT FORWARD POLICY

As a not-for-profit corporation, all proceeds from property sales are shared between BENLIC and the local municipality where a property is situated. These proceeds repay public municipal costs and are circulated back into BENLIC operations to continue funding positive neighborhood change. According to the Land Bank Act, 50% of the real property taxes collected on any specific parcel of real property may be collected by the land bank as a remittance for a period of up to 5 years after the sale of the property. This is commonly referred to as the "pay it forward" policy. BENLIC does not require taxing jurisdictions to pay it forward when net proceeds of the primary sale of real property are positive, because all BENLIC carrying costs have already been recovered. This policy encourages more municipalities to cooperate with the land bank by allowing them to collect the full value of real property taxes as soon as BENLIC has recouped its costs.

## 11

### DEVELOP A YEAR-ROUND MODULAR HOUSING FACTORY & DEPLOY MODULAR HOUSING UNITS THROUGHOUT THE REGION

Addressing the region’s housing shortage requires transformational, innovative strategies. This action will seek to establish a new modular housing factory in the region, with a focus on carbon neutral homes. Point Positive, an angel investor group that supports start-ups in the Adirondack region, can leverage its expertise in new venture expansion and finance to either

recruit an existing modular housing firm to build a factory in the region or incentivize an entrepreneur to realize this market disequilibrium. The LCLGRP will work with Point Positive to identify suitable factory locations, secure state and federal grants, and partner with local workforce development organizations to staff the factory.

## 12

### CREATE & DEPLOY A REGIONAL HOUSING PORTAL

Making it easier for current and

potential residents to find housing in the LCLG Region is an important aspect of stabilizing the regional housing market. Consumers must have access to information on the regional housing market to make informed decisions about rental agreements and housing purchases. This action will establish a clearinghouse of local housing information and assist current and potential residents in finding appropriate housing options.

Access to housing search data will allow the LCLGRP and the regional housing coordination group to understand what current and potential residents are looking for in their housing search, helping to guide future housing strategies.



# MAIN STREETS & COMMUNITY CENTERS AS ECONOMIC ENGINES

Main Streets, community hubs, and downtowns matter. This initiative is about increasing the capacity for implementing economic development initiatives along the region’s main streets through a regional Main Street program and other tailored planning tools and collaboration.

## 13 PRIORITY PROJECT: CONNECT MAIN STREETS & COMMUNITY HUBS

The LCLGRP will create a cohort of main street leaders to work together and establish a single, region-wide Main Street revitalization program. The program will focus on new and existing business and entrepreneur vitality; quality of place and human experience in the built environment; housing; and internal and external marketing and communications connecting downtowns to each other and to regional assets and amenities. Through

collaborative efforts, shared resources, and shared intelligence, this program will amplify and expand successful local initiatives throughout the region to vitalize these important community centers.

### KEY NEXT STEPS

1. Assemble a program design team - consisting of representatives from Main Streets throughout the region - to lead the launch of this

2. Prepare mission & vision statement for program and organizational structure
3. Engage with NYS Office of Community Renewal (OCR) for discussion of program alignment with NY Main Street program eligibility
4. Identify select projects to launch the program

## 14 PRIORITY PROJECT: MAIN STREET REDEVELOPMENT SITE ASSESSMENTS

This project will be an initiative under the region’s new Main Street Revitalization Program. Site assessments will be completed to determine redevelopment potential for key commercial spaces throughout the region. The purpose is to take the first step in the redevelopment process and uncover some of the unknowns about these properties. By reducing

uncertainty and risk, it can make key commercial sites more attractive to developers and investors. This initiative will be coupled with the creation of a Main Street Redevelopment Fund to purchase, renovate, and sell/rent these prime commercial spaces.

### KEY NEXT STEPS

1. Create an inventory of commercial

2. Prioritize sites and determine scope of assessment needs for each site
3. Secure funding
4. Conduct assessments
5. Share findings with stakeholders

## 15

### ESTABLISH REGIONAL DESTINATION MANAGEMENT PLANNING WORKING GROUP

This group will focus on the distinct elements that make up a complete destination experience. This includes lodging, recreation activities, Main Streets, workforce, and connectivity between sites.

## 16

### PURSUE BOA DESIGNATIONS IN RELEVANT GEOGRAPHIES

Leveraging state and federal programs like the Brownfield Opportunity Area (BOA) allows communities to access resources and tools that would otherwise be challenging to find. Brownfields hold great redevelopment opportunities if they are managed in a safe manner. These sites are often in highly visible areas, making their transformation to a productive use a

boost for the community’s morale and fiscal bottom line.

## 17

### MATCH SMALL BUSINESSES & STARTUPS WITH MAIN STREET SPACES

This project will promote retail and commercial density in the region’s Main Streets. It will also help small businesses and entrepreneurs find spaces in locations where they are likely to find a relatively solid customer base and visible storefront.

## 18

### MAIN STREET RENT STABILIZATION

The LCLGRP will work to establish committees in interested communities with vacant properties along Main Street. The committee would include the property owners, economic development agencies, chambers, and local code enforcement office (if applicable). The intended outcome

would be establishing a financial assistance program for property owners that would subsidize rent for local small businesses to rent Main Street properties, establish themselves, and make any required renovations.

## 19

### DOWNTOWN & HAMLET CENTER STREETSCAPE REVITALIZATION

The LCLGRP will advocate for the development of a NYSDOT rural downtown and hamlet revitalization program. The program should provide funding for design and redevelopment of streetscapes within downtown and hamlet areas. In addition to funding, the NYSDOT should identify ways to advance complete streets principles and designs; streamline current highway design approval and administration procedures so that smaller municipalities can undertake projects; incorporate local development land use plans; and embrace flexible highway design standards for pedestrian and multimodal facilities.



MassDevelopment’s Transformative Development Initiative (TDI) is a program designed to accelerate economic growth within focus districts. The program consists of a comprehensive toolkit that includes expertise & technical assistance through dedicated fellows, investment, and funding for strategic projects and pilot programs, and business growth services, such as collaborative workspaces, partner loans, and microfinancing options. The program utilizes a co-investment theory approach; TDI funds are intended to help an idea reach scale for private investment or should be supplemental to other investments to assist with implementation. In the program’s first 3 years \$10.5 million in program funds have led to over \$38 million in private investments and supplemented over \$82 million of existing public/private investments in TDI districts.



## ENTREPRENEURIAL ECOSYSTEM BUILDING

By solidifying the culture and distinct resources for entrepreneurs, this initiative aims to help take individuals with an entrepreneurial mindset and support them in their venture to create and grow a business. This initiative also recognizes gaps or barriers for MWBE entrepreneurs and will devote resources to supporting equitable start-up opportunities.

## 20 PRIORITY PROJECT: REIMAGINE SUPPLY CHAIN RESILIENCE THROUGH ENTREPRENEURSHIP

The LCLGRP will create a program connecting anchor employers in the region that have complex supply chains with the entrepreneurial community. The purpose is to engage around weaknesses in the supply chains and identify where local capability to invent and innovate is feasible. An important part of this initiative is getting employment anchors involved so they can contribute and drive the conversation about their industry needs.

The transportation manufacturing subsector has already shown high potential to explore growing local suppliers. The industry association for transportation manufacturing in the North County identified specializations that could locate or grow in the region. Using this subsector as an industry pilot will help determine the potential for other manufacturing subsectors, and eventually in other industries.

### KEY NEXT STEPS

#### Organize the program

1. Work with Chamber(s), NAmTrans, and regional EDOs to obtain buy-in, participation, & feedback on supply chain needs from OEMs (original equipment manufacturers) & anchor employers
2. Work with the supply chain management programs at Clarkson & SUNY Plattsburgh to have faculty/students assist with data collection and employer surveys
3. Work with regional EDOs to identify existing local entrepreneurs & small & medium-sized enterprises (SMEs) interested in participating

#### Connect entrepreneurs with resources

4. Work with Clarkson's Shipley Center for Innovation & CCC to host at Clarkson's incubator space and/or the IAM (to allow for prototyping & R&D)
5. Work with AEDC/PTAC/SBDC, etc. that provide assistance certifying entrepreneurs as MWBEs/SDVOBs
6. Work with Point Positive/Upstate Capital to assist entrepreneurs obtaining any capital needed for project(s)
7. Work with organizations like the Workforce Development Institute/CITEC or regional Manufacturing Extension Partnership (MEP) to provide training & assistance obtaining necessary industry certifications to supply required parts/components

## 21 PRIORITY PROJECT: COORDINATE COHORTS FOR REGIONAL SMALL BUSINESS TRAINING & SUPPORT

The LCLGRP will aim to increase the capacity of the regional startup and small business support system by grouping current and prospective businesses with similar needs into cohorts. Data from the BRE survey or conversations with other providers will be used to establish distinct cohort training programs (lodging businesses, tourism, Main Street, and artists are a few examples) that tailor resources and tools to subjects most useful to those groups. Example curriculum may include understanding customers, legal and accounting, financial modeling,

succession planning, etc.

These cohorts provide valuable network-building opportunities and built-in peer support for the region's small business owners and entrepreneurs, in addition to skill and resource development.

One of the first cohorts to organize will be a group of lodging business owners that are likely to retire in the next 5-10 years, to provide training and technical assistance around succession planning to ensure these important businesses remain.

### KEY NEXT STEPS

1. Solidify proposed training cohorts and identify pilot cohort
2. Coordinate with current service providers (e.g., ANCA and AEDC) on timing and existing models that could be folded into the pilot
3. Market to intended audience with clear value-proposition for participants

## 22

### HOLD A STARTUP PITCH COMPETITION

Support and organize a competition to showcase the creativity of the entrepreneurs/small business in the region that may not be at a scale yet to receive large investment. Use an anchor institution (e.g., college or university in the region) and multiple partners to generate buzz about the competition and provide supportive resources and mentorship as part of the competition.



NEXT Learning Labs was formed by a group of Greenville, SC entrepreneurs that wanted to create a network of entrepreneurs and supporters with the aim of nurturing and promoting local economic growth. Interested entrepreneurs can access "prerequisite" videos through NEXT Learning Lab's website and sign up to join a live interactive session with an expert instructor and a small cohort of other entrepreneurs. Live sessions are scheduled on an as-need basis as cohort minimums are reached.



23

### HOST A REGULAR EVENT SERIES FOCUSED ON NETWORKING & SUPPORT

Entrepreneurs and business owners crave a sense of belonging and community support. Strong entrepreneurial networks host regular event series that act as an 'open house' of sorts and serve as an easy entryway into the local entrepreneurial community. Typically, these events include some element of networking combined with short presentations from local people who currently own or plan to run a business. The group provides the presenters with

immediate feedback, guidance, and ideas.

The 1 Million Cups model is one format that can serve as an entry way to the entrepreneurial ecosystem and an informal setting to share ideas, network, and crowdsource solutions to business startups. These events are hosted all over the country by individuals in the community with help from the support and materials from the Kauffman Foundation. Initiating a 1 Million Cups for the LCLG Region will promote the existing entrepreneurial culture and bring light to connections that can be made by budding businesses.



Developed by the Ewing Marion Kauffman Foundation in 2012, 1 Million Cups (1MC) is based on the notion that great ideas are discussed over a million cups of coffee.

1MC is a free program that is now organized around 160 volunteer-led communities across the country, each designed to educate, engage, and inspire entrepreneurs. Every Wednesday morning 1MC events take place. During each event, entrepreneurs have 6 minutes to present their company or business idea to community members, followed by 20 minutes of questions, feedback, and support. In line with the intention of 1MC that each chapter is created by the community, for the community, each event concludes with a question posed to the entrepreneur: "What can we as a community do to help you?"

### Point Positive, Inc.

was formed in 2014 as a standalone angel investor group to support entrepreneurial business start-ups in the Adirondack region. Since its establishment, Point Positive members have invested in 10 different start-up or early stage companies.

24

### ENSURE WOMEN, MINORITIES, & VETERANS ARE ACCESSING & ENGAGING IN THE ECOSYSTEM

Women, veterans, and minorities are underrepresented, and underserved, in the LCLG Region's entrepreneurship network. The LCLGRP will ensure that all marketing and communications related to building the region's entrepreneurship network reflects these groups. Partnering with community groups and other non-traditional economic development or planning organizations to engage these groups in the business resource ecosystem is important to opening pathways to accessing the entrepreneurial ecosystem. The LCLGRP will track engagement in the ecosystem among these groups and adapt programming and messaging, as necessary.

25

## PRIORITY PROJECT: SUPPORT EFFORTS/FUND POTENTIAL TO UPSKILL EXISTING WORKERS, ESPECIALLY IN HIGH TECH FIELDS

### CAREER BUILDING & SKILLS TRAINING

As the region's major industries adapt to new markets and technologies, the need to align how the regional workforce is trained must also be adapted. Demonstrating the opportunities for not just a job, but a career, to young adults or people with the potential to relocate to the area, will strengthen the opportunities for individual prosperity and business success.

The demand for employees across all industries remains a critical need. However, growth in micro-chip producers, transportation manufacturing, medical device production, and others will rely on workers who have the ability to manage and work with the technology required to grow these sectors. Targeting the skills needed within these fields will help drive opportunities for workers and make companies more resilient.

Workforce Development Boards (WDBs) will be close collaborators on this initiative. With the on-the-ground information garnered from education and workforce professionals,

the LCLGRP's BRE survey can help fill in real-time gaps of labor market knowledge (see Recommendation #27). The LCLGRP can use targeted questions to not only determine current business needs but forecast which positions will be needed in the future based on market demand. As technology rapidly shifts where and how labor is needed, this real-time information will be critical for educators to pivot their training options in tandem with market demand.

#### KEY NEXT STEPS

1. Identify list of priority businesses who would benefit from growing in-house expertise with help from

WDBs and BRE survey results

2. Identify list of particular in-demand skills with help of WDBs and BRE survey results
3. Coordinate with educational partners on where existing programs exist and where new training would need to be created or adapted
4. Determine method of training (e.g., on-the-job, certificate, classes)
5. Determine funding/grant source for supporting training



## WORKFORCE DEVELOPMENT BOARDS IN THE LCLG REGION

Workforce development boards (WDBs) are part of the Public Workforce System, a network of federal, state, and local offices that serve as connectors between the U.S. Department of Labor and local American Job Centers. The WDBs' role is to develop regional strategic plans and set funding priorities for their area. There are two WDBs in the LCLG Region: the Saratoga, Warren, Washington WDB and the North Country WDB (serving Clinton, Essex, Hamilton, and Franklin Counties).

26

### REPLICATE "CAREER JAM" PROGRAM ACROSS THE REGION

The Career Jam program is a singular hub of employers that allows high school students to see the various occupations/industries available locally and regionally. This project will replicate the Career Jam model throughout the LCLGR Region (in-person, and virtually) as it aligns with workforce resources.

27

### TAILOR BRE SURVEY QUESTIONS FOR REAL-TIME LABOR MARKET INFORMATION

The needs of employers are changing



The Saratoga, Warren, Washington WDB, in partnership with the Saratoga EDC and area schools, created an event for youth in 2019 called "Career Jam." This event offered youth the opportunity to interact with dozens of employers in a hands-on, fun manner to expose them to companies and jobs in the region. The event was held virtually over a 6-week period in 2021 and has expanded to include other grade levels.

rapidly. The LCLGRPB's BRE survey offers the adaptability to ask questions that provide real-time labor market information that can be fed directly to workforce and educational partners. The LCLGRPB will share these data widely and at regular intervals with partners to better inform workforce training priorities.

28

### ADVOCATE FOR BOCES SKILL-BUILDING IN PLACE OF STUDY HALL

BOCES is an underutilized resource that could be utilized by more students in the region, if offered in alternate settings. This project supports advocating to expand BOCES skill-building tools and resources to students who have free periods throughout their school day.

## ADDITIONAL ACTIONS

In addition to the strategies identified in the preceding pages, a series of specific actions were identified to support sector specific goals and build on other competitive assets of the region.

### 29 PRIORITY PROJECT: SUPPORT & REPLICATE EXISTING MOBILE HEALTH CARE PROVIDERS

Mobile health clinics are becoming more common as the health care industry adapts to meet the needs of rural and underserved patient populations. Nationally, these clinics primarily serve patients that are uninsured or have a form of public insurance. Most clinics are independent or affiliated with a hospital system. Just over half of mobile health clinics receive philanthropic support, and less than half receive federal funds.

In keeping with these national trends, health care providers in the region are attempting to fill the gap caused by the closure of brick-and-mortar facilities with the deployment of mobile units. These pilots have proven successful and should be expanded, including deploying more units that offer basic services and adding units that offer specialty services that can rotate among communities.

The LCLGRPB can support efforts to expand mobile health care programs by working to address the challenges to their expansion. This includes working to address the certification requirements for the facilities that

are not realistic for many rural or mobile health programs, specialized recruitment efforts (potentially in coordination with Recommendation #34), and the need for better data on seasonal population shifts and increased community outreach.

#### KEY NEXT STEPS

1. Engage with health providers in the region
2. Collect and utilize seasonal population data to assist with mobile health clinic operations
3. Advocate for changes to the NYS Certificate of Need process to enable more flexibility & faster deployment of mobile health programs
4. Obtain funding for new mobile health clinics and hubs



The Hudson Headwaters Health Network (HHHN) operates an existing mobile health clinic in the LCLG Region. The program is the region's first mobile health program offering primary care and select services for medically underserved populations. Building upon the success of this program and expanding service may create new opportunities in the region's health care market while delivering quality health care to underserved populations.



The Cornell Food Venture Center (CFVC) is located in Geneva, NY on the Cornell AgriTech Campus. CFVC provides comprehensive assistance to new and established food entrepreneurs to ensure safety and stability of food products entering the marketplace. Their services include:

- Lab analysis for pH, water activity, and Brix of food and beverage products;
- Process Authority approval and Scheduled Process: Product Review, Documentation, and Process Validation;
- Resources for Nutrition Analysis, Co-Packers, Packaging Suppliers, and Shelf-Life Studies;
- Regulatory Compliance: Registration and Licensing with State and FDA agencies;
- Small Scale Food Entrepreneurship: A Technical Guide for Food Ventures; and
- Better Process Control School: Necessary certification for Acidified and Low Acid Food manufacturers.

The center also provides access to high pressure processing (HPP) facilities, a vinification and brewing laboratory, and a unique processing facility designed to assist businesses with scaling and optimizing food production. Since 2000, the CFVC has helped bring more than 20,000 commercial food products to market.



## 30 PRIORITY PROJECT: ESTABLISH A REGIONAL AGRICULTURAL HUB

The region's agricultural businesses are important to the region's economy and character and to the health of its residents.

Support services for the agricultural sector are provided by a range of entities across the region and state, each of whom has different areas of focus, from technical support and training to conserving agricultural land and providing links between farmers and consumers.

There is currently one "food hub" in Essex County (Hub on the Hill), with another in development by Comfort Food Community in Washington County. The LCLGRP will support these existing hubs to identify priority

services and funding for expansions, such as additional distribution capacity to support the growing Farm to School initiative. Locating additional agricultural services at these and potential other hubs in the region will facilitate communication amongst providers, connect makers with producers, allow for idea exchange, and offer the potential for shared resources and research and development to further support this sector.

Cornell Cooperative Extension will be an important resource in this priority project. The Cornell Food Venture Center, which helps food businesses introduce new food products into the marketplace, could serve as a periphery partner providing technical assistance

to the new regional agricultural hub(s).

### KEY NEXT STEPS

1. With partner agricultural sector service providers, use the BRE to collect information on agricultural producers and makers' needs and priorities for regional agricultural hub(s)
2. Support and coordinate with existing and planned food hubs in the region, including Hub on the Hill and Comfort Food Community, as they look to grow their services
3. Explore opportunities for expansion of existing food hubs in the region and new facilities to support the sector's growing and diversified needs

## 31

### RE-ENVISION THE FOREST INDUSTRY

Bringing technological advances into the existing economies of the region will make the region more resilient. The LCLGRP, in partnership with the Warren County EDC, APA, and 501CTHREE, will work to insert new technologies into the forestry industry to increase productivity and reduce environmental impact. The group will establish a pilot facility to test clean technologies and advanced product usage within the Adirondack Park, including nanocellulose. Pulp and Paper Manufacturing Modernization, Wood-Based Housing Manufacturing, Sustainable Supply Chains, Workforce Empowerment and Entrepreneurship Infrastructure are all key elements of this project.

in collaboration with the regional agricultural hub.

## 33

### EXPLORE MOBILE MEAT PROCESSING FACILITIES

A working group, led by the LCLGRP in coordination with regional agriculture stakeholders, will evaluate the long-term meat processing needs of the region's agricultural businesses and the potential establishment of a mobile meat processing facility to support the larger region.

## 34

### EXPLORE DEVELOPING A RURAL HEALTH CARE HOUSING PROGRAM

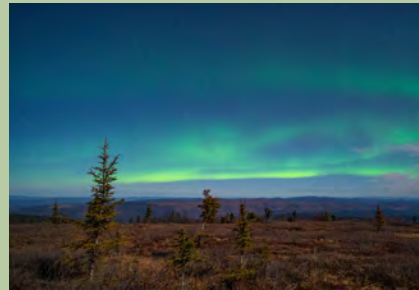
Attracting doctors to rural areas is a struggle nationally, with a continually decreasing interest of medical school graduates to work in rural communities. Adding the region's escalating housing prices to the decision matrix makes attracting health care professionals an even greater obstacle. Facing this challenge, housing incentives are needed to ensure that the region's residents have access to necessary health care. The LCLGRP, with health care provider partners, will explore developing a rural health care housing program to house health care professionals and residents on a rotating basis.



NAMTrans is a strategic subsidiary of the North Country Chamber of Commerce (NCCC) designed to serve, support, and raise awareness of the transportation equipment and aerospace cluster.

NAMTrans provides technical assistance, education & training, workforce development, supply chain development, and business location services to the region's large and diverse cluster of over 50 transportation equipment and aerospace manufacturers.





The 2020 ROOST Leisure Travel Study found that 77% of annual visitations to the LCLG Region occur between May and October. Seasonality in the tourism industry creates challenges for continuity in commercial and economic operations during the whole year. Expanding winter and shoulder season tourism may serve as a catalyst for small business development and economic diversification. In Fairbanks, Alaska, expanding the summer tourism season through winter by marketing the “aurora season” has resulted in a 7% increase in overall visitors and 10% increase in hotel/motel tax collection. The expanded tourism season has strengthened the regional travel industry, providing more year-round jobs and a rise in small businesses.

35

### CONDUCT A REGIONAL ECONOMIC DIVERSIFICATION ASSESSMENT

Heavy reliance on the tourism and hospitality industries makes the LCLG Region's economy vulnerable to

economic disruption. The LCLGRP will lead the preparation of a regional economic diversification assessment that looks at how other rural regions have fostered economic diversification and develop an actionable strategy to foster the growth of emerging sectors and industries.

36

### INCREASE COORDINATION & COLLABORATION WITHIN THE MEDICAL DEVICE AND LIFE SCIENCE SECTOR

The pandemic has highlighted the importance of collaboration and communication for support and growth. The medical device and life science sector is an asset to the region and could benefit from increased collaboration, support, and advocacy. The North American Center for Excellence for Transportation Equipment (NAMTrans) could serve as a model.

37

### HIGHLIGHT THE VALUE OF THE US/CANADIAN BORDER TO THE REGIONAL ECONOMY

The region's location along the Canadian border is a competitive asset that brings with it additional opportunities for trade, tourism, and economic growth. The LCLGRP will continue to support the work of partner organizations in their efforts to grow the region's economy through increased partnership and

collaboration with Canada. The region's proximity to Canada and the Montreal metropolitan region should be highlighted as a means to attract new residents, businesses, and tourists.

38

### SHOWCASE THE REGION AS A LEADER IN CLIMATE PROTECTION

The LCLG Region and the greater Adirondacks are a leader in climate protection, with significantly less greenhouse gas (GHG) emissions than other areas of the state and an impressive amount of annual carbon sequestration, due in large part to the forest cover of the Adirondack Park. While often touted for its natural resources in terms of their beauty and recreation offerings, there is an opportunity to showcase the climate smart advantages of the region to attract additional tourists, businesses, and residents.

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### CONTINUE LCLGRP'S ROLE AS THE REGION'S COORDINATING ECONOMIC DEVELOPMENT ORGANIZATION

The pandemic has highlighted the importance of thinking and acting regionally and collaboratively. Building off the work of the Forward Together Economic Resiliency Plan and the launch of the BRE program, the LCLGRP has an opportunity to play a more central role in the region's economy moving forward.

## CLOSING REMARKS

The Forward Together plan provides the LCLGRP, along with its regional partners, the blueprint for advancing the recovery and growth of the region's economy.

The planning process initiated key next steps for identified priority projects; the LCLGRP's BRE survey will be crucial for outreach, data collection, and engagement. The LCLGRP has already applied for and secured funding for priority projects - notably the housing assessment and strategy - enabling the LCLGRP to take immediate action.

The Implementation Matrix included in Appendix E provides information on potential partners, timelines, costs, and metrics for each of the projects identified in the plan. The metrics will allow the LCLGRP to track and report progress to partner organizations, the LCLGRP board, and the public. Commitment to collaboration and cooperation is a defining asset that the LCLGRP will continue to employ to move the plan's recommendations forward.



## ENDNOTES

<sup>1</sup> Lake Placid, NY: Market-Rate Rental Housing & Condominium Feasibility Study, June 2021.

<sup>2</sup> Northern Adirondack Board of Realtors, March 2021 Market report.

<sup>3</sup> Elizabeth Izzo, “Adirondack Real Estate Boom Hasn't Let Up a Year into the Pandemic,” North Country Public Radio. June 7, 2021.

<sup>4</sup> Leila Schochet, “The Child Care Crisis is Keeping Women Out of the Workforce,” Center for American Progress, March 28, 2019.

<sup>5</sup> NYS Workforce Development Initiative

<sup>6</sup> Sandra Bishop-Josef and others, “Want to Grow the Economy? Fix the Child Care Crisis” (Washington: Council for Strong America, 2019)

<sup>7</sup> NYS Workforce Development Initiative

<sup>8</sup> Reimagining Infrastructure in the United States: How to Build Better, McKinsley & Company, 2020.

<sup>9</sup> Voigt, B., Lees, J., & Erickson, J., An Assessment of the Economic Value of Clean Water in Lake Champlain, Lake Champlain Basin Program, 2015.

<sup>10</sup> Siegler, Kirk, “The Struggle to Hire and Keep Doctors in Rural Areas Means Patients Go Without Care,” National Public Radio, May 21, 2019.

<sup>11</sup> U.S. Health Resources & Services Administration data, accessed August 12, 2021.

<sup>12</sup> “Economic Impact of Visitors in New York 2019: Adirondack Focus,” Tourism Economics.

<sup>13</sup> “Hiker Data Shows Impacts from Pandemic, Increase in Novice Hikers.” Adirondack Mountain Club, October 2020.

<sup>14</sup> “Economic Impact of Visitors in New York 2019: Adirondack Focus,” Tourism Economics.

<sup>15</sup> <http://www.oppex.org>





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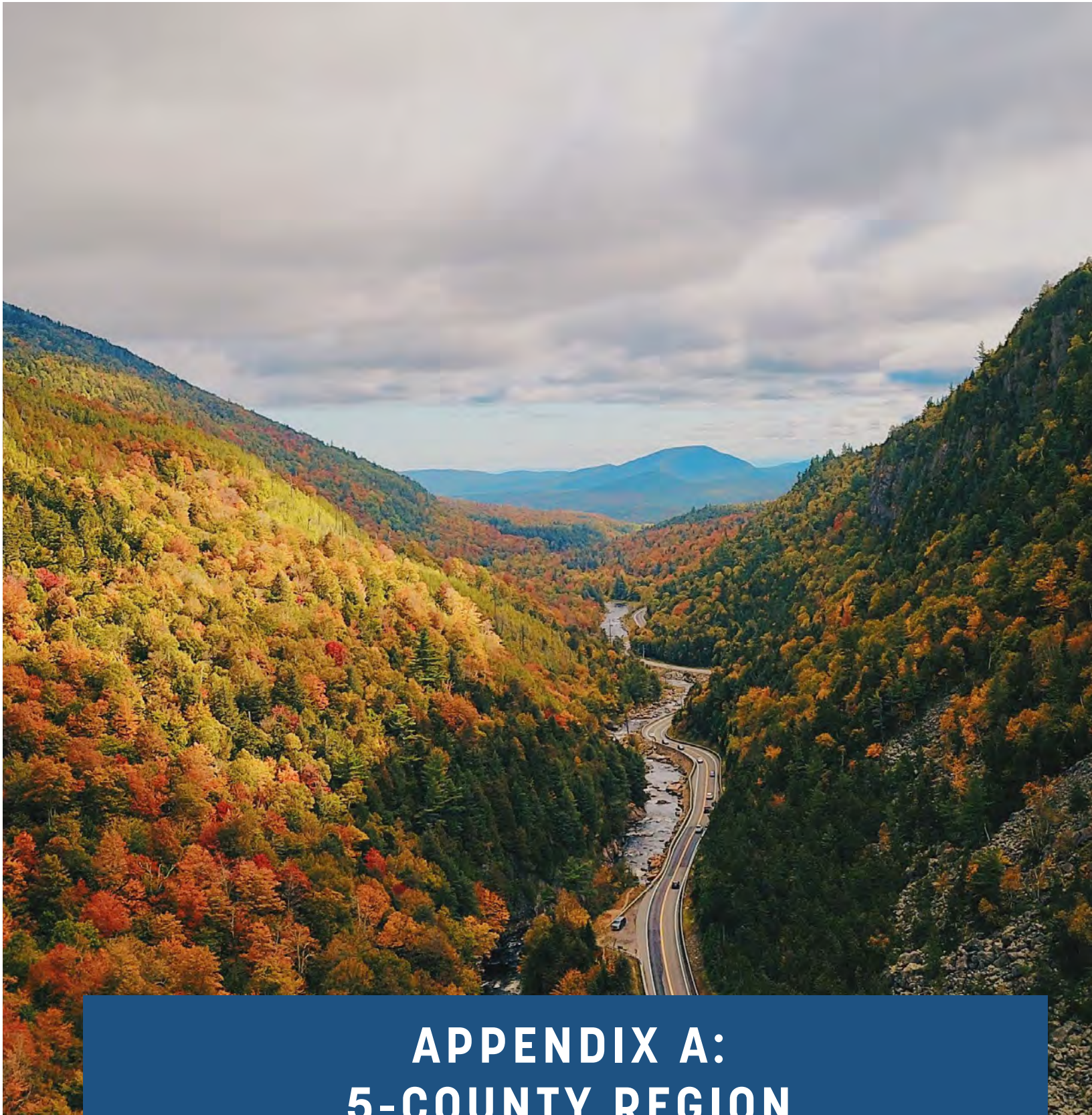
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**THANK YOU**



Beth Gilles, Executive Director • [Beth.gilles@lclgrpb.org](mailto:Beth.gilles@lclgrpb.org) • [lclgrpb.org](http://lclgrpb.org)





**APPENDIX A:  
5-COUNTY REGION  
ECONOMIC PROFILE**



# DRAFT REPORT

## 5-COUNTY REGION ECONOMIC PROFILE

Submitted to:

LAKE CHAMPLAIN LAKE GEORGE REGIONAL  
PLANNING BOARD

MAY 2021 V.4





# ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on Facebook and LinkedIn.

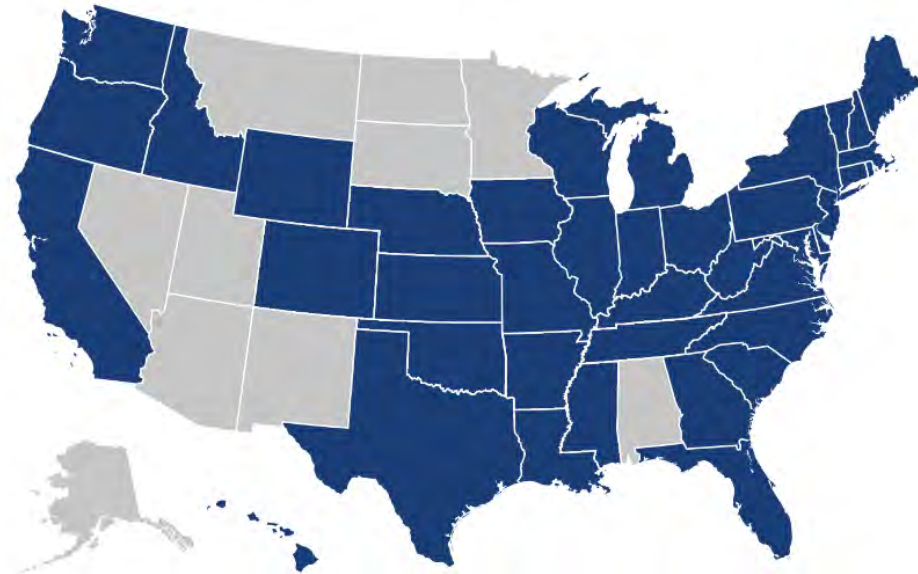
## THE PROJECT TEAM

Christa O. Franz  
*Principal*

Alex Tranmer  
*Project Manager*

Tom Dworetzky  
*Lead Analyst*

Aaron Metheny  
*Analyst*







*Long Lake, Hamilton County*

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**DRAFT FOR DISCUSSION PURPOSES ONLY.**



# KEY FINDINGS

Camoin 310 conducted a data analysis on the 5-county region that makes up the Lake Champlain Lake George region (LCLG Region). Economic implications from the data analysis are presented below. This initial analysis sets the foundation for the effort to develop strategies that set a path for the region's recovery and resiliency from the COVID-19 pandemic. The work in this analysis relies on data sources like the U.S. Census, American Community Survey and U.S. Agricultural Census. Interviews and other primary research will help supplement these findings and provide on-the-ground confirmation or clarity on data findings.

## REGIONAL ANALYSIS TAKEAWAYS

### **Limited population growth has direct implications for the region's economic sustainability, resiliency, and growth.**

A consistent population, relatively low median household income and an aging population characterize the region's demographics. These trends are not uncommon to the North Country and other rural portions of the country and can limit the ability of local businesses to grow when additional workforce is not readily available. While the region hopes to sustain and increase its population base by showcasing the economic and quality of life opportunities in the region, supporting the growth of the existing labor force must also be a strategy to catalyze economic changes. Growing the labor force from within will mean mitigating barriers to entering the workforce like access to childcare or transportation to employment centers, and access to affordable housing, among others. This could also mean working with populations that face additional behavioral health obstacles to employment, such as mental and substance use disorders, and need labor force reentry resources.

**The LCLG Region's economy is driven by institutional and legacy industries.** Medical institutions and education facilities ("meds and eds"), both public and private, support about a third of employment. While Manufacturing plays a smaller role in employment overall, its contribution to Gross Regional Product demonstrates its importance

to the economy. Agriculture remains an important part of the legacy of the region, especially in Washington and Clinton Counties.

### **Year over year, taxable sales from travel accommodations and restaurants were down in 2020, but to a lesser degree than the rest of New York State. Retail purchases, which generated notable sales tax revenue, was buoyed by online retail sales.**

Overall sales tax collections were up in Essex and Washington County in 2020, while the region saw a 0.9% decrease in sales tax revenue, compared to a decline of 10% across the entire state. The visitation volume across the region varies, as groups are drawn to locations with amenities like restaurants, other shops and lodging options. Moving ahead with strategies to capitalize on the regional name recognition to establish the market in locations that are less traveled or currently have less amenities will help to retain the environmental quality of the Adirondacks and spread economic activity throughout the region.

**While the tourism and recreation industries are well suited to adapt to the necessary social and public health precautions during COVID-19, the sectors with the greatest opportunity to work from home are not prevalent in the region.** Professional services and technology sectors tend to have greater opportunities for remote-work and only make up about 6% of the region's jobs. Growing businesses in professional services or technology related sectors will require a robust digital infrastructure network, as well as

a focus on the quality-of-life elements throughout the region, entrepreneurship networks and supportive business environment.

**The LCLG Region recovered at a much slower rate from the 2008 recession compared to New York State or the rest of the country.**

Since the 2008 recession, New York's employment grew by about 12% and the United States' total employment grew by about 14%. The LCLG Region expanded employment by just 1%. Economic recovery following severe disruption is driven by established firms rebounding as well as new establishment growth. Following the 2008 recession, new business growth was concentrated in metropolitan areas and this uneven distribution has been attributed to why many rural regions did not rebound. Recovery from the economic disruption caused by the COVID-19 pandemic will necessitate a multi-faceted approach that anticipates the industries with the greatest opportunity to emerge from COVID-19 in the region and fosters an environment that supports business creation. This will help the region not just return to status quo but capitalize on emerging opportunities coming out of this economic and public health crisis and be more resilient in the future.

**COVID-19 impacts continue to ripple through the economy.**

While the LCLG Region demonstrated far fewer new cases day to day (per 100,000 people) than the state and the rest of the country in most of 2020, the most recent COVID-19 data shows that new confirmed cases per 100,000 as a 7-day moving average was elevated at a similar rate following the holiday season throughout all three geographies, although figures have begun to decline in early 2021. While public health sectors work to rollout the vaccine and continue to bring down the total number of cases the need for adequate protection for businesses and consumers will remain essential to maintain business activity. COVID-19 continues to drive changes in the real estate market, driving up the price of lumber and putting pressure on an already tight inventory.

## NEXT STEPS

As a foundational component of the Economic Resiliency Plan, the findings from the Economic Base Analysis uncover additional research and interviews that can be done to develop strategies. While there are additional elements of the scope that will be delivered in the months to come, the following immediate next steps were identified by Camoin 310:

**Dive into workforce development and broadband access**

**connections** – While access to broadband is a definite challenge to overcome in the region, there are a series of related challenges on top of physical deployment of broadband infrastructure. This includes the public awareness of the availability of service, access to hardware and appropriate device, affordability, and basic technological skills to access and utilize internet resources.

**Research in-demand skills for tech/digital sectors** – With the imperative to make the switch or adapt to digital technologies for remote work throughout 2020, entire business models have been reimagined. Understanding the latest skills requirements in digital and technology sectors and comparing that to the skills of the regional workforce will help identify gaps in skills and/or education and training programs with the ability to upskill the population and prepare workers for the in-demand occupations across a range of sectors.

**Understand the immediate and future needs of small businesses and entrepreneurs**

- Small businesses and entrepreneurs will be a critical driver of economic recovery, growth, and resiliency for the region. Therefore, it will be important to understand the needs of small businesses who are driving job growth and new job creation, as well as how to better connect, strengthen, and broaden the entrepreneurial ecosystem to reinforce a culture of entrepreneurship throughout the region's economy.



# METHODOLOGY

## STUDY REGIONS

The goal of Forward Together: Economic Resiliency Plan is to provide a road map to secure the economic future of the 5-county region pictured to the right. To begin, it is important to establish a baseline understanding of the LCLG Region and the area in which it is located. Economic conditions within the region are determined by a variety of factors that interrelate with conditions in the wider area, including the State and national level trends. This report provides the results of a data analysis conducted to identify demographic, socioeconomic, and business and industry trends in the five-county area that comprises the Lake Champlain Lake George Regional Planning Board. The study area thus includes the Clinton County, Essex County, Hamilton County, Warren County and Washington County (see Figure 1).

## DATA SOURCES

Much of the data in this report was acquired from Esri Business Analyst Online (Esri) and Economic Modeling Specialists International (Emsi). Esri uses the 2000 and 2010 Census as its base data. It uses proprietary statistical models and data from the US Census Bureau, the US Postal Service, and other sources to project current statistics and future trends. Esri data are often used for economic development, marketing, site selection, and strategic decision making. Emsi uses data compiled from several sources, including the US Census Bureau and US Departments of Health and Labor. Using specialized proprietary processes and models, it provides estimates on current statistics and predicts future trends. The data used are from Emsi's Complete Employment data set, which includes both jobs covered and uncovered by unemployment insurance. In other words, it includes both traditional employment and non-traditional employment such as the self-employed. As traditional jobs have been replaced or augmented by freelance work, consulting, and self-employment, these non-covered jobs have become much more important to the economy, and Emsi provides researchers with a way to track the trends over time.

Figure 1: Map of Study Area

— County outline



# DEMOGRAPHIC AND SOCIOECONOMIC PROFILE





## DEMOGRAPHIC SUMMARY

- ◆ Growth in the LCLG Region has remained flat compared to the state and nation. The region’s population has increased by 0.3% since 2010.
- ◆ With a median age of 44.4 in 2020, LCLG residents are older than the state and nation.
- ◆ Household incomes in the LCLG Region are lower than the state and nation. 2020 median household income in the region is about \$57,000, or approximately \$12,000 lower than the median in New York and \$5,000 lower than the median in the nation.

Table 1

### Demographic Summary

	2010	2020	2025	2010-2020 % Change	2020-2025 % Change
<b>Lake Champlain Lake George Region</b>					
Population	255,257	256,120	253,240	0.3%	-1.1%
Median Age	42.1	44.4	45.4	5.5%	2.3%
Households	102,238	104,153	103,235	1.9%	-0.9%
Average Household Size	2.36	2.34	2.33	-0.8%	-0.4%
Median Household Income		\$57,418	\$60,426		5.2%
<b>New York</b>					
Population	19,378,102	19,825,692	19,899,059	2.3%	0.4%
Median Age	37.9	39.3	40.4	3.7%	2.8%
Households	7,317,755	7,522,434	7,558,777	2.8%	0.5%
Average Household Size	2.57	2.56	2.56	-0.4%	0.0%
Median Household Income		\$68,828	\$75,239		9.3%
<b>United States</b>					
Population	308,745,538	333,793,107	346,021,282	8.1%	3.7%
Median Age	37.1	38.5	39.3	3.8%	2.1%
Households	116,716,292	126,083,849	130,658,485	8.0%	3.6%
Average Household Size	2.6	2.6	2.6	0.0%	0.4%
Median Household Income		\$62,203	\$67,325		8.2%

Source: Esri

**DEMOGRAPHIC SUMMARY – COUNTY DETAIL**

Table 2

**Demographic Summary - Lake Champlain Lake George Region County Detail**

	2010	2020	2025	2010- 2020 % Change	2020- 2025 % Change		2010	2020	2025	2010- 2020 % Change	2020- 2025 % Change
<b>Clinton County</b>						<b>Warren County</b>					
Population	82,128	83,461	83,423	1.6%	0.0%	Population	65,707	67,079	66,587	2.1%	-0.7%
Median Age	39	41.1	42.5	5.4%	3.4%	Median Age	44	46.8	48	6.4%	2.6%
Households	31,582	32,781	32,896	3.8%	0.4%	Households	27,990	28,974	28,869	3.5%	-0.4%
Average Household Size	2.37	2.34	2.33	-1.3%	-0.4%	Average Household Size	2.32	2.29	2.28	-1.3%	-0.4%
Median Household Income		\$59,265	\$62,949		6.2%	Median Household Income		\$58,101	\$61,194		5.3%
<b>Essex County</b>						<b>Washington County</b>					
Population	39,370	37,880	36,783	-3.8%	-2.9%	Population	63,216	63,395	62,411	0.3%	-1.6%
Median Age	44.4	47.2	48.2	6.3%	2.1%	Median Age	41.7	43.7	44.7	4.8%	2.3%
Households	16,262	16,114	15,698	-0.9%	-2.6%	Households	24,142	24,240	23,841	0.4%	-1.6%
Average Household Size	2.26	2.22	2.21	-1.8%	-0.5%	Average Household Size	2.49	2.49	2.49	0.0%	0.0%
Median Household Income		\$53,890	\$56,082		4.1%	Median Household Income		\$56,989	\$59,650		4.7%
<b>Hamilton County</b>											
Population	4,836	4,305	4,036	-11.0%	-6.2%						
Median Age	51.1	55.2	56.8	8.0%	2.9%						
Households	2,262	2,044	1,931	-9.6%	-5.5%						
Average Household Size	2.1	2.07	2.05	-1.4%	-1.0%						
Median Household Income		\$56,206	\$58,286		3.7%						

Source: Esri

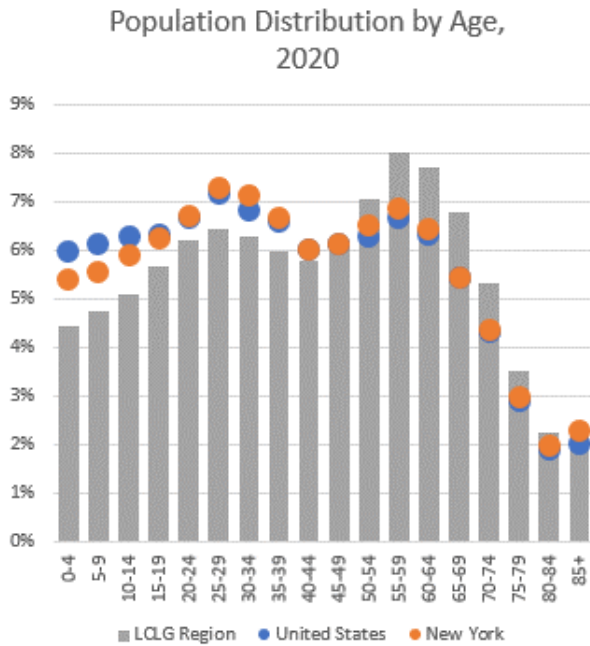
*Note: The total population figures account for the prisons, jails, and correctional facilities in the region: Altona, Adirondack Correctional Facility, Clinton County Correctional Facility, Great Meadow Correctional Facility and Washington Correctional Facility. However, incarcerated individuals are considered to live in "group quarters" and therefore are not counted in any figures regarding households, including median household income.*



## POPULATION CHARACTERISTICS

- ◆ A larger portion of the LCLG Region’s population is in the 50-79 age cohort compared to the state and the nation.
- ◆ The LCLG Region’s population has a smaller share of population of 18 and younger compared to New York and the U.S. (17.4% vs. 20.4% and 22%, respectively), a similar share of working-age adults (18-64), and a higher share of population over 65 compared to the state and nation (20.3% vs. 17.1% and 16.6%, respectively).
- ◆ The distribution of population by age across the five counties is similar. Clinton County’s population has the highest share of working-age adults at 65.7%, and Hamilton County’s population has the highest percentage of adults 65+ at 28.3%.

Figure 1



Source: Esri

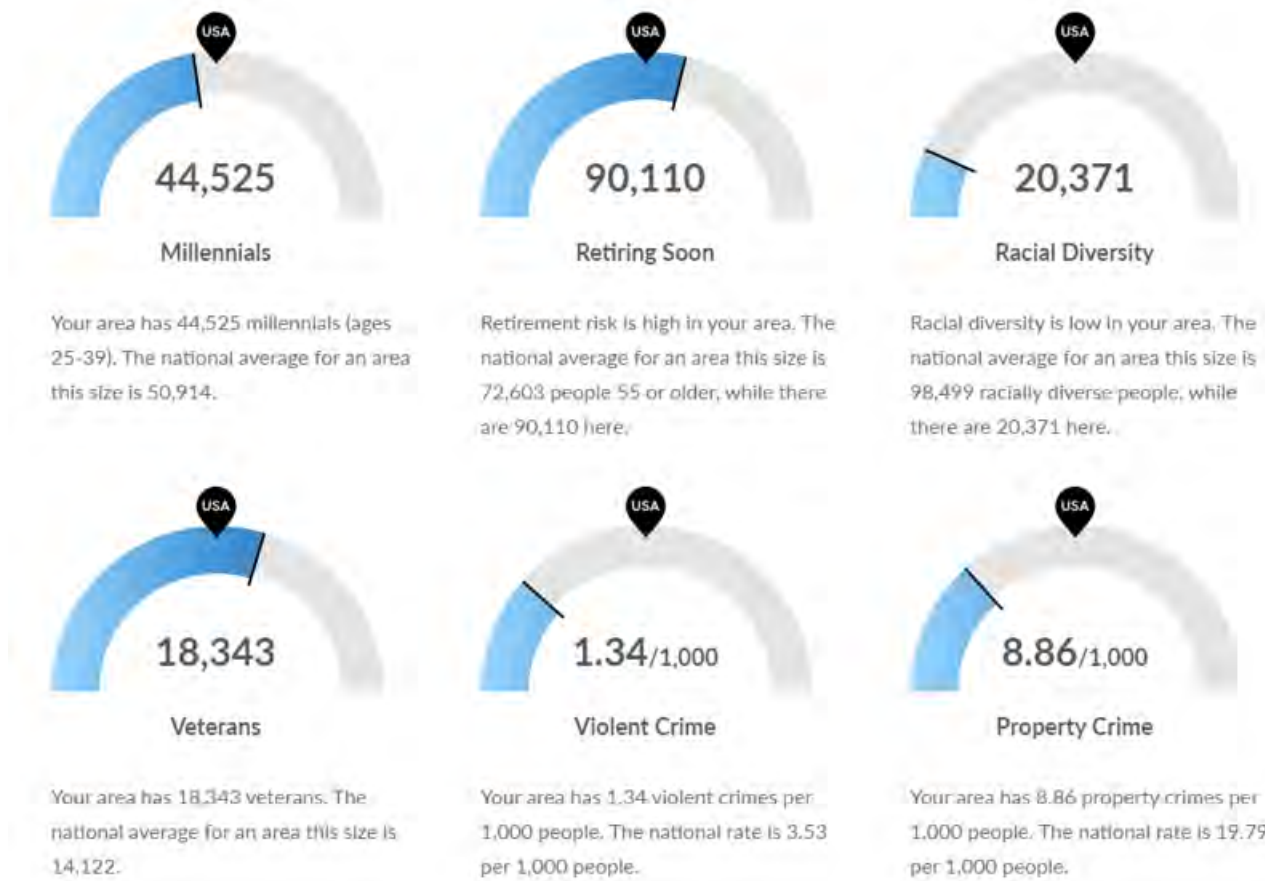
Table 3

Age	United States	New York	Clinton County	Essex County	Hamilton County	Warren County	Washington County
0-4	6.0%	5.4%	4.4%	4.3%	3.0%	4.4%	4.7%
5-9	6.1%	5.6%	4.7%	4.4%	3.8%	4.7%	5.0%
10-14	6.3%	5.9%	4.9%	5.0%	4.6%	5.2%	5.3%
15-19	6.3%	6.3%	6.4%	5.5%	3.8%	5.2%	5.5%
20-24	6.7%	6.7%	8.1%	5.1%	3.2%	5.1%	5.8%
25-29	7.2%	7.3%	7.1%	5.8%	3.9%	6.1%	6.5%
30-34	6.8%	7.1%	6.9%	5.8%	4.1%	5.8%	6.5%
35-39	6.6%	6.7%	6.2%	5.8%	4.6%	5.7%	6.2%
40-44	6.0%	6.0%	5.9%	5.6%	5.3%	5.5%	6.0%
45-49	6.2%	6.2%	6.2%	6.3%	5.9%	6.1%	6.4%
50-54	6.3%	6.5%	6.7%	7.0%	7.5%	7.2%	7.4%
55-59	6.7%	6.9%	7.7%	8.2%	10.9%	8.4%	7.7%
60-64	6.3%	6.4%	7.2%	8.1%	11.2%	8.1%	7.5%
65-69	5.5%	5.4%	5.8%	7.8%	10.4%	7.5%	6.5%
70-74	4.3%	4.4%	4.6%	6.0%	7.7%	5.8%	5.2%
75-79	2.9%	3.0%	3.1%	4.1%	4.5%	3.8%	3.5%
80-84	1.9%	2.0%	2.0%	2.6%	3.0%	2.5%	2.1%
85+	2.0%	2.3%	2.0%	2.8%	2.6%	2.8%	2.3%
<b>Total Age &lt;18</b>	<b>22.0%</b>	<b>20.4%</b>	<b>16.8%</b>	<b>17.3%</b>	<b>13.9%</b>	<b>17.6%</b>	<b>18.4%</b>
<b>Total Age 18+</b>	<b>78.0%</b>	<b>79.6%</b>	<b>83.2%</b>	<b>82.8%</b>	<b>86.1%</b>	<b>82.4%</b>	<b>81.6%</b>
<b>Total Age 18-65</b>	<b>61.4%</b>	<b>62.5%</b>	<b>65.7%</b>	<b>59.5%</b>	<b>57.8%</b>	<b>60.0%</b>	<b>62.1%</b>
<b>Total Age 65+</b>	<b>16.6%</b>	<b>17.1%</b>	<b>17.5%</b>	<b>23.3%</b>	<b>28.3%</b>	<b>22.4%</b>	<b>19.5%</b>

Source: Esri

- ◆ The LCLG Region has a smaller than average proportion of Millennials, which aligns with the population data seen on the previous page.
- ◆ The proportion of the population that is 55+, and within the range of retirement, is larger than the national average.
- ◆ Racial diversity is significantly lower than the national average.
- ◆ Violent crime and property crimes are well below the national average.

Figure 2

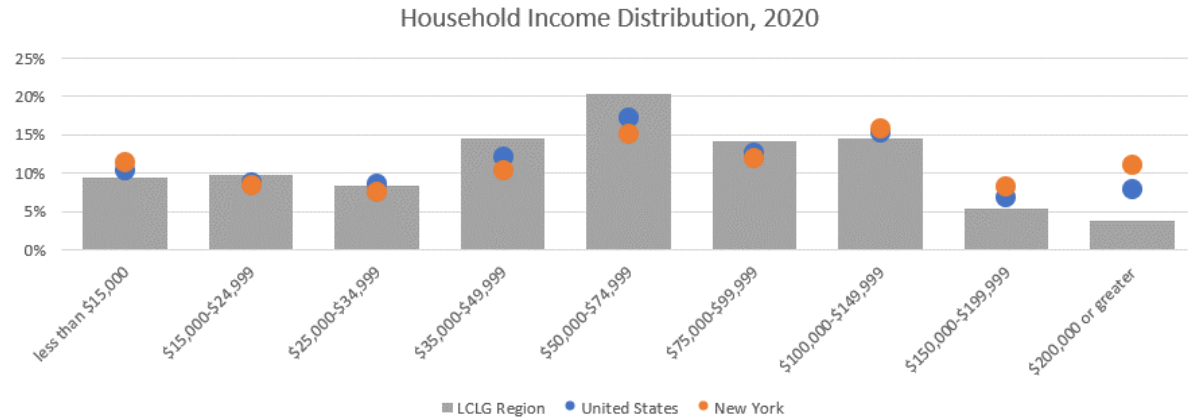




## HOUSEHOLD INCOME

- ◆ Household incomes are lower in the LCLG Region than the state and nation. New York and the U.S. have a higher share of households with incomes greater than \$100,000.
- ◆ Median household income (MHI) is similar across the five counties, with MHI ranging from about \$54,000 in Essex County to approximately \$59,000 in Clinton County. MHI in New York is about \$69,000, and the MHI in the U.S. is approximately \$62,000.
- ◆ Note that household income does not include the region’s incarcerated population.

Figure 3



Source: Esri

Table 4

Household Income Distribution, 2020

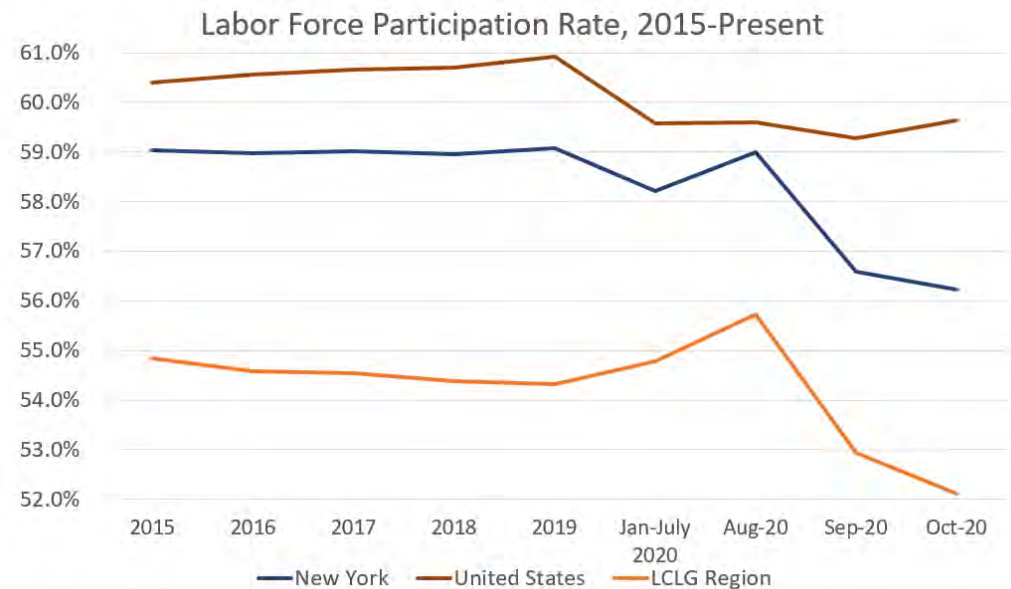
Income Range	Clinton County	Essex County	Hamilton County	Warren County	Washington County
less than \$15,000	10.64%	9.33%	8.95%	7.25%	10.50%
\$15,000-\$24,999	8.08%	9.85%	10.37%	12.05%	8.93%
\$25,000-\$34,999	7.19%	10.67%	8.66%	8.56%	8.38%
\$35,000-\$49,999	14.47%	15.38%	13.55%	14.10%	14.71%
\$50,000-\$74,999	20.44%	21.33%	24.46%	19.25%	20.17%
\$75,000-\$99,999	14.15%	14.10%	13.99%	14.22%	13.92%
\$100,000-\$149,999	16.10%	12.49%	12.38%	14.05%	14.40%
\$150,000-\$199,999	5.20%	4.52%	3.86%	5.18%	6.22%
\$200,000 or greater	3.74%	2.33%	3.77%	5.34%	2.77%
<b>Median Household Income</b>	<b>\$59,265</b>	<b>\$53,890</b>	<b>\$56,206</b>	<b>\$58,101</b>	<b>\$56,989</b>

Source: Esri

## LABOR FORCE PARTICIPATION

- ◆ Over the past five years, the LCLG region has persistently had lower levels of labor force participation compared to the state and nation. This is partially driven by the older age distribution of the region, as older workers are less likely to participate in the labor force.
- ◆ While New York State and the US experienced drops in labor force participation in the first half of 2020, the LCLG region experienced an increase.
- ◆ Since August, both the state and the region have experienced significant declines in the rate while the US rate has remained relatively flat.

Figure 4



The notable uptick in labor force participation rate over the summer months in the LCLG region likely reflects tourism-related seasonal hiring across the 5 counties.

Ongoing downward trends from end of summer to fall 2020 demonstrate a drop off in seasonal positions, but also reflects individuals that are leaving the labor force or no longer looking for jobs due to ongoing strains on businesses due to COVID-19.

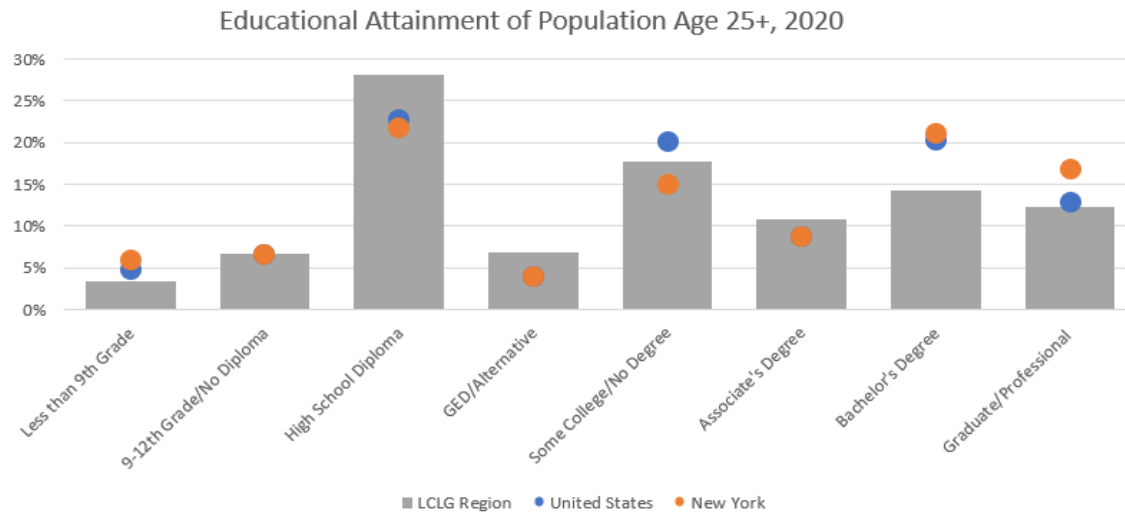


## EDUCATIONAL ATTAINMENT

◆ Compared to NY and the nation, the LCLG Region population has a smaller share of residents who hold at least a Bachelor’s degree (26%, versus 36% in NYS and 33% nationwide).

◆ Educational attainment is highest in Warren County, where 32% of residents possess at least a Bachelor’s degree.

Figure 5



Source: Esri

Table 5

**Educational Attainment of Population age 25+, 2020**

Education	Clinton County	Essex County	Hamilton County	Warren County	Washington County	LCLG Region	New York	United States
Less than 9th Grade	4%	3%	3%	2%	4%	3%	6%	5%
9-12th Grade/No Diploma	7%	5%	14%	5%	8%	7%	7%	7%
High School Diploma	29%	26%	26%	26%	31%	28%	22%	23%
GED/Alternative Credential	8%	6%	3%	6%	7%	7%	4%	4%
Some College/No Degree	17%	18%	22%	18%	18%	18%	15%	20%
Associate's Degree	10%	11%	12%	11%	11%	11%	9%	9%
Bachelor's Degree	12%	17%	10%	17%	12%	14%	21%	20%
Graduate/Professional Degree	12%	13%	11%	15%	9%	12%	17%	13%
<b>High School/Equivalent or Higher (includes GED)</b>	<b>89%</b>	<b>92%</b>	<b>84%</b>	<b>92%</b>	<b>88%</b>	<b>90%</b>	<b>87%</b>	<b>89%</b>
<b>Bachelor's Degree or Higher</b>	<b>25%</b>	<b>30%</b>	<b>21%</b>	<b>32%</b>	<b>22%</b>	<b>27%</b>	<b>38%</b>	<b>33%</b>

Note: Incarcerated individuals are accounted for in educational attainment levels, which impacts figures in Clinton, Essex, and Washington Counties.

## RACE AND ETHNICITY

- ◆ The vast majority of the LCLG Region’s population is white. Compared to the state and nation, the LCLG Region’s population is less racially diverse.
- ◆ Among the five counties of the region, Clinton County’s population has a slightly larger proportion of Black/African Americans and Asians.

Figure 6  
Population by Race, 2020

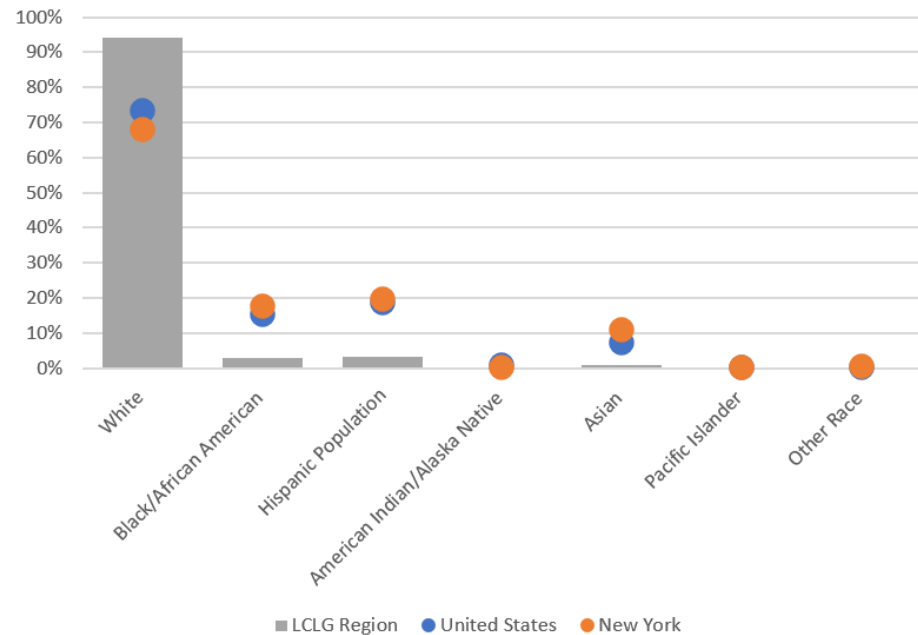


Table 6  
Population by Race, 2020

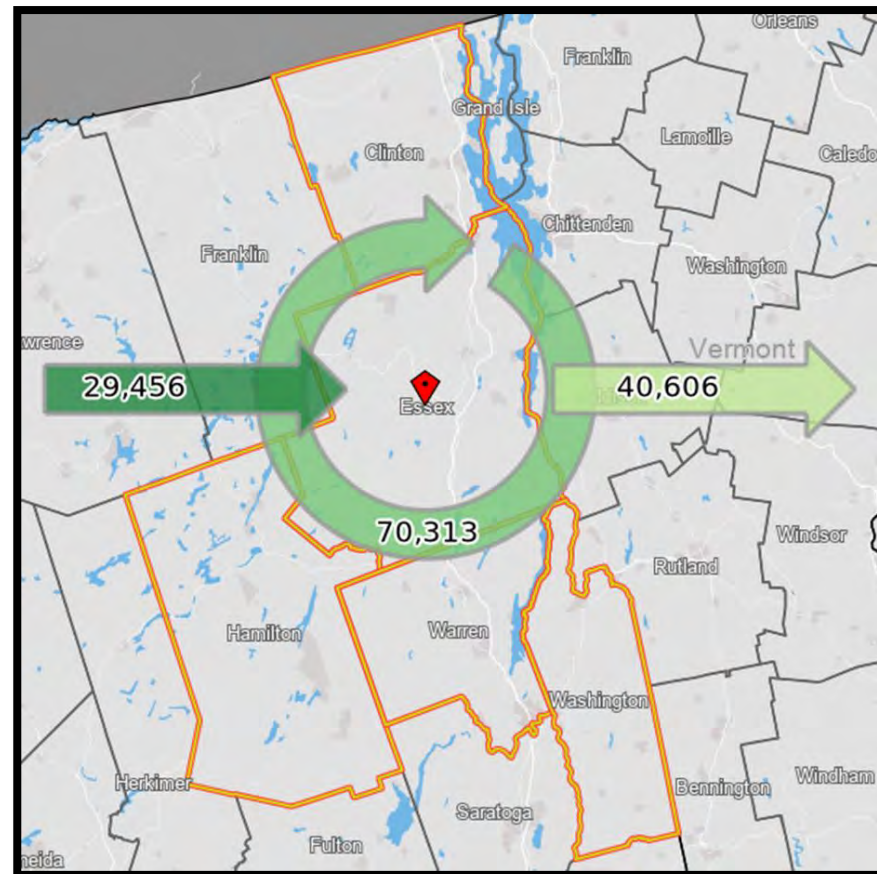
Race	Clinton County	Essex County	Hamilton County	Warren County	Washington County
White	92.19%	94.89%	96.03%	95.80%	94.73%
Black/African American	4.32%	2.32%	1.06%	1.34%	3.03%
Hispanic Population	3.15%	3.13%	1.79%	2.95%	3.08%
American Indian/Alaska Native	0.37%	0.36%	0.26%	0.25%	0.23%
Asian	1.46%	0.83%	0.90%	0.94%	0.59%
Pacific Islander	0.02%	0.02%	0.09%	0.01%	0.03%
Other Race	0.14%	0.09%	0.02%	0.06%	0.14%

Source: Esri



## COMMUTE PATTERNS

- ◆ 29,456 individuals commute into the LCLG Counties, another 70,313 work/live in the LCLG Counties and 40,606 commute out of the counties for work.
- ◆ Over half of the LCLG Counties' resident workers work within the region.
- ◆ Warren County has the highest portion of in-commuters. 57.9% of workers live outside of the county.
- ◆ Washington County has the highest portion of out-commuters. 71.8% of resident workers work outside of the county.



Source: US Census OnTheMap

Note: Arrows represent overall regional commuter inflows and outflows and do not indicate commute direction.

**LCLG County Commuter Trends, 2018**

	<u>Count</u>	<u>Percent</u>
Employees		
In-Commuters	29,456	29.5%
Employed and Live in Region	70,313	70.5%
<b>Total</b>	<b>99,769</b>	<b>100.0%</b>
Resident Workers		
Out-Commuters	40,606	36.6%
Employed and Live in Region	70,313	63.4%
<b>Total</b>	<b>110,919</b>	<b>100.0%</b>

Source: U.S. Census OnTheMap

**Commuter Trends, County Detail, 2018**

	Clinton County	Essex County	Hamilton County	Washington County	Warren County
In-Commuters	22.6%	43.5%	41.3%	49.3%	57.9%
Out-Commuters	30.0%	47.4%	47.7%	71.8%	49.8%
Employed and Live in County	70.0%	52.6%	52.3%	28.2%	50.2%

Source: U.S. Census OnTheMap



**LABOR SHED**

- ◆ A plurality of the LCLG Counties' residents have short commutes of less than 10 miles to work (43.9%). This is followed by 24.6% of residents who commute 10 to 24 miles to work.
- ◆ Outside of the Counties, Saratoga County, Albany County, Franklin County, Rutland County, Vermont, and St. Lawrence County are the most common places of employment for residents.

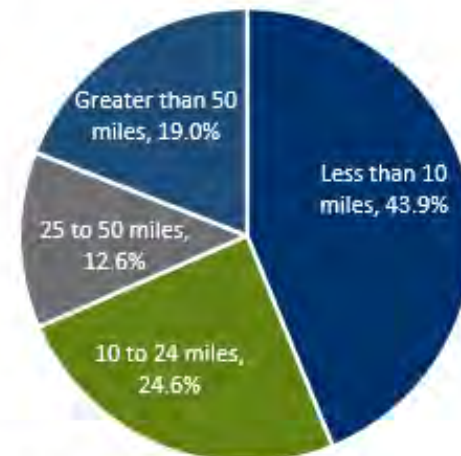
**Where LCLG Counties' Residents Work, 2018**

	<u>Count</u>	<u>Share</u>
<i>Clinton County, NY</i>	26,078	24%
<i>Warren County, NY</i>	22,534	20%
<i>Essex County, NY</i>	10,414	9%
<i>Washington County, NY</i>	10,332	9%
Saratoga County, NY	9,679	9%
Albany County, NY	5,383	5%
Franklin County, NY	2,226	2%
Rutland County, VT	1,524	1%
St. Lawrence County, NY	1,503	1%
Schenectady County, NY	1,343	1%
All Other Locations	19,903	18%

Source: U.S. Census OnTheMap

*Italicized counties are in the LCLG Region.*

**Figure 2**  
Commute Distance of LCLG Counties' Residents, 2018



Source: U.S. Census OnTheMap

# INDUSTRY ANALYSIS



*Ausable Chasm, Essex County*



## EMPLOYMENT BY SECTOR, 2-DIGIT NAICS

- ◆ As of the first quarter of 2020, there were over 113,000 jobs in the LCLG Region.
- ◆ Warren County accounts for 36% of these jobs, followed by Clinton County with 33%, Washington County with 15%, Essex County with 14%, and Hamilton County with 2%.

Table 7

LCLG Region 2020 Employment by Sector, 2-Digit NAICS

NAICS Description	Clinton County	Essex County	Hamilton County	Warren County	Washington County	LCLG Region
11 Agriculture, Forestry, Fishing and Hunting	1,410	233	30	175	624	2,473
21 Mining, Quarrying, and Oil and Gas Extraction	25	86	0	125	131	367
22 Utilities	119	24	<10	194	18	355
23 Construction	1,853	874	134	1,808	1,115	5,785
31 Manufacturing	3,352	911	33	3,339	2,636	10,272
42 Wholesale Trade	734	312	66	843	345	2,299
44 Retail Trade	5,123	1,792	234	5,443	1,968	14,560
48 Transportation and Warehousing	1,567	159	51	529	260	2,565
51 Information	352	199	12	777	126	1,465
52 Finance and Insurance	457	328	<10	1,343	215	2,344
53 Real Estate and Rental and Leasing	469	154	27	438	109	1,197
54 Professional, Scientific, and Technical Services	1,016	301	19	1,549	305	3,190
55 Management of Companies and Enterprises	83	57	<10	603	18	761
56 Administrative and Support and Waste Management and Remediation Services	1,320	293	43	2,637	681	4,974
61 Educational Services	335	474	17	441	62	1,329
62 Health Care and Social Assistance	5,889	1,958	47	6,269	1,852	16,016
71 Arts, Entertainment, and Recreation	341	542	149	1,405	303	2,739
72 Accommodation and Food Services	2,962	2,506	274	5,591	690	12,024
81 Other Services (except Public Administration)	1,276	716	134	1,888	665	4,680
90 Government	8,466	4,239	834	4,975	5,156	23,670
99 Unclassified Industry	32	30	<10	44	27	133
<b>Total</b>	<b>37,183</b>	<b>16,189</b>	<b>2,122</b>	<b>40,416</b>	<b>17,305</b>	<b>113,215</b>
<b>Percent of Total LCLG Region Jobs</b>	<b>33%</b>	<b>14%</b>	<b>2%</b>	<b>36%</b>	<b>15%</b>	<b>100%</b>

Source: Emsi

## EMPLOYMENT DISTRIBUTION BY SECTOR, 2-DIGIT NAICS

- ◆ Government accounts for the most jobs in the region – 20.9% of total jobs. Other top contributors include Health Care and Social Assistance (14.1%), Retail Trade (12.9%), and Accommodation and Food Services (10.6%). These sectors are also more concentrated in the region than in the rest of the country (refer to Sector Concentration discussion on pg. 19).
- ◆ Health Care and Social Assistance is particularly prevalent in Clinton and Warren counties.
- ◆ Manufacturing is one of the top job contributors in Washington County.
- ◆ Agriculture, Forestry, Fishing and Hunting accounts for a nominal proportion of jobs in each county. The highest percentage of employment is in Clinton and Washington County, 3.8% and 3.6%.

Table 8

**LCLG Region 2020 Employment Distribution by Sector, 2-Digit NAICS**

NAICS Description	Clinton County	Essex County	Hamilton County	Warren County	Washington County	LCLG Region
11 Agriculture, Forestry, Fishing and Hunting	3.8%	1.4%	1.4%	0.4%	3.6%	2.2%
21 Mining, Quarrying, and Oil and Gas Extraction	0.1%	0.5%	0.0%	0.3%	0.0%	0.3%
22 Utilities	0.3%	0.2%	<0.5%	0.5%	0.1%	0.3%
23 Construction	5.0%	5.4%	6.3%	4.5%	6.4%	5.1%
31 Manufacturing	9.0%	5.6%	1.6%	8.3%	15.2%	9.1%
42 Wholesale Trade	2.0%	1.9%	3.1%	2.1%	2.0%	2.0%
44 Retail Trade	13.8%	11.1%	11.0%	13.5%	11.4%	12.9%
48 Transportation and Warehousing	4.2%	1.0%	2.4%	1.3%	1.5%	2.3%
51 Information	0.9%	1.2%	0.6%	1.9%	0.7%	1.3%
52 Finance and Insurance	1.2%	2.0%	<0.5%	3.3%	1.2%	2.1%
53 Real Estate and Rental and Leasing	1.3%	1.0%	1.3%	1.1%	0.6%	1.1%
54 Professional, Scientific, and Technical Services	2.7%	1.9%	0.9%	3.8%	1.8%	2.8%
55 Management of Companies and Enterprises Administrative and Support and Waste Management and Remediation Services	0.2%	0.4%	<0.5%	1.5%	0.1%	0.7%
56	3.5%	1.8%	2.0%	6.5%	3.9%	4.4%
61 Educational Services	0.9%	2.9%	0.8%	1.1%	0.4%	1.2%
62 Health Care and Social Assistance	15.8%	12.1%	2.2%	15.5%	10.7%	14.1%
71 Arts, Entertainment, and Recreation	0.9%	3.3%	7.0%	3.5%	1.7%	2.4%
72 Accommodation and Food Services	8.0%	15.5%	12.9%	13.8%	4.0%	10.6%
81 Other Services (except Public Administration)	3.4%	4.4%	6.3%	4.7%	3.8%	4.1%
90 Government	22.8%	26.2%	39.3%	12.3%	29.8%	20.9%
99 Unclassified Industry	0.1%	0.2%	<0.5%	0.1%	0.2%	0.1%

Note: NAICS 90, Government, includes federal, state, and local government (including military and postal service), correctional facilities, as well as public schools and hospitals.

Source: Emsi

\*Darker green indicates higher percentages.



## JOB TRENDS BY SECTOR, 2-DIGIT NAICS

- ◆ Between 2015 and Q1 2020, the LCLG Region’s economy added 690 jobs (1%).
- ◆ Government added the most jobs, 462. This is followed by Health Care and Social Assistance with 328 jobs.
- ◆ Retail Trade and Administrative/Support and Waste Management Services lost the most jobs over this time period, losing 478 and 227 jobs, respectively. The Manufacturing and Agriculture sectors also experienced job losses over this period.
- ◆ Average earnings per job in the region is \$57,124. This is lower than the average earnings per job of \$88,755 in the state.

Table 9

**LCLG Region Jobs Trends by Sector, 2-Digit NAICS**

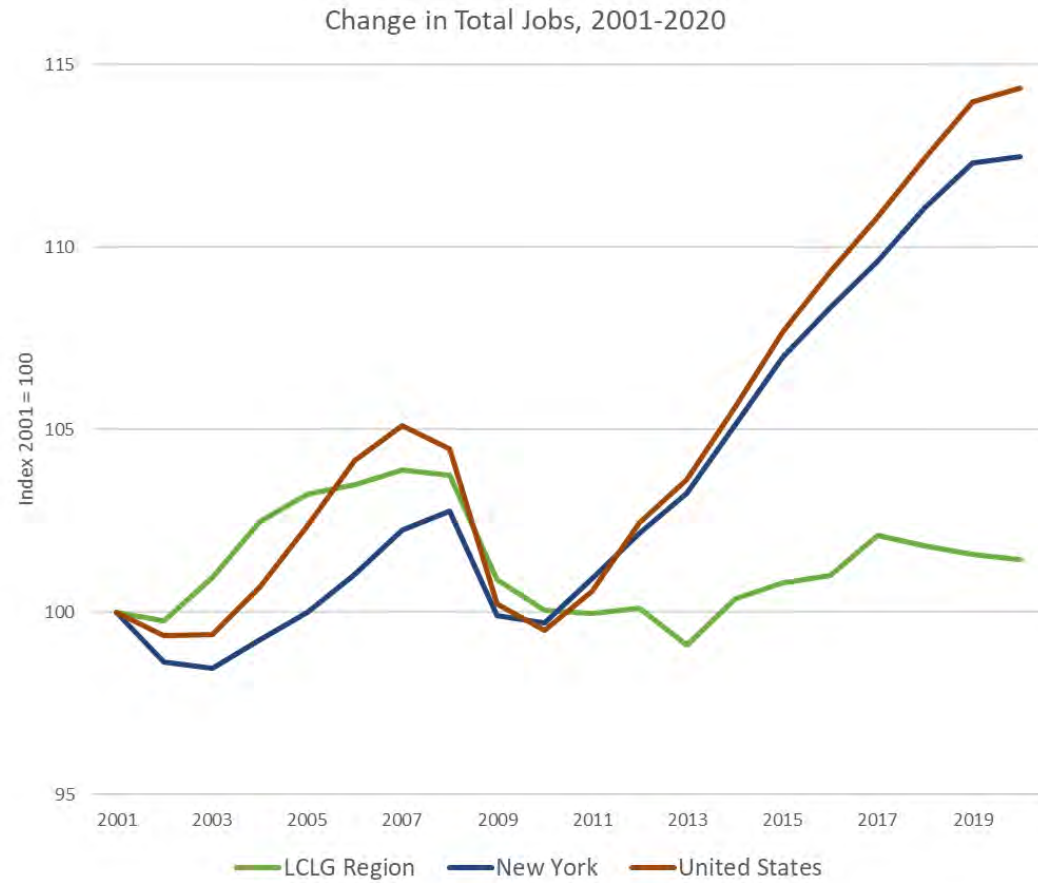
NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	2,626	2,473	(153)	(6%)	\$46,210
21	Mining, Quarrying, and Oil and Gas Extraction	382	367	(15)	(4%)	\$69,478
22	Utilities	333	357	24	7%	\$148,971
23	Construction	5,480	5,785	305	6%	\$65,230
31	Manufacturing	10,429	10,272	(157)	(2%)	\$76,072
42	Wholesale Trade	2,329	2,299	(30)	(1%)	\$79,847
44	Retail Trade	15,038	14,560	(478)	(3%)	\$37,541
48	Transportation and Warehousing	2,530	2,565	35	1%	\$51,902
51	Information	1,511	1,465	(46)	(3%)	\$76,330
52	Finance and Insurance	2,292	2,350	58	3%	\$75,120
53	Real Estate and Rental and Leasing	1,169	1,197	29	2%	\$45,705
54	Professional, Scientific, and Technical Services	3,165	3,190	26	1%	\$63,886
55	Management of Companies and Enterprises	711	767	56	8%	\$68,093
56	Administrative and Support and Waste Management and Remediation Services	5,201	4,974	(227)	(4%)	\$40,318
61	Educational Services	1,039	1,329	289	28%	\$36,375
62	Health Care and Social Assistance	15,688	16,016	328	2%	\$59,701
71	Arts, Entertainment, and Recreation	2,861	2,739	(121)	(4%)	\$29,510
72	Accommodation and Food Services	11,976	12,024	48	0%	\$27,510
81	Other Services (except Public Administration)	4,422	4,680	257	6%	\$31,581
90	Government	23,208	23,670	462	2%	\$79,590
99	Unclassified Industry	137	137	(0)	(0%)	\$35,452
<b>Total</b>		<b>112,525</b>	<b>113,215</b>	<b>690</b>	<b>1%</b>	<b>\$57,124</b>

Source: Emsi

\*NAICS 90, Government, includes federal, state, and local government (including military and postal service), as well as public schools and hospitals.

## HISTORIC ECONOMIC TRENDS

- ◆ Since the 2008 Recession, the LCLG Region employment base has grown by 1%, while the state grew employment by 12% and the country by 14%.





## AVERAGE EARNINGS BY SECTOR

- ◆ Average earnings per job are highest in Washington County and Clinton County, reaching \$59,204 and \$59,072, respectively. Both counties exceed the average earnings per job for the region.

Table 10

LCLG Region Average Earnings by Sector, 2-Digit NAICS

NAICS	Description	Clinton County	Essex County	Hamilton County	Warren County	Washington County
11	Agriculture, Forestry, Fishing and Hunting	\$49,866	\$36,590	\$45,536	\$48,090	\$41,047
21	Mining, Quarrying, and Oil and Gas Extraction	\$61,898	\$80,813	\$0	\$86,165	\$47,463
22	Utilities	\$162,939	\$177,830	Insf. Data	\$139,028	\$122,924
23	Construction	\$81,746	\$50,093	\$35,221	\$64,614	\$54,270
31	Manufacturing	\$65,405	\$84,686	\$49,134	\$83,196	\$77,972
42	Wholesale Trade	\$61,621	\$42,012	\$84,491	\$115,304	\$65,352
44	Retail Trade	\$37,733	\$35,505	\$32,510	\$38,329	\$37,318
48	Transportation and Warehousing	\$51,942	\$52,173	\$31,339	\$51,827	\$55,686
51	Information	\$58,494	\$53,693	\$40,432	\$89,529	\$83,924
52	Finance and Insurance	\$62,029	\$82,394	Insf. Data	\$80,944	\$56,501
53	Real Estate and Rental and Leasing	\$42,667	\$50,135	\$28,942	\$49,338	\$42,052
54	Professional, Scientific, and Technical Services	\$50,385	\$67,610	\$87,555	\$72,514	\$59,838
55	Management of Companies and Enterprises	\$57,889	\$55,789	Insf. Data	\$71,207	\$54,558
56	Administrative and Support and Waste Management and Remediation Services	\$40,667	\$33,607	\$34,125	\$39,843	\$44,757
61	Educational Services	\$36,465	\$45,240	\$35,273	\$28,203	\$26,614
62	Health Care and Social Assistance	\$61,668	\$53,131	\$63,673	\$64,281	\$44,792
71	Arts, Entertainment, and Recreation	\$25,292	\$35,699	\$37,958	\$28,580	\$23,350
72	Accommodation and Food Services	\$23,605	\$31,467	\$28,408	\$28,596	\$20,747
81	Other Services (except Public Administration)	\$29,879	\$35,705	\$33,050	\$29,501	\$36,017
90	Government	\$87,658	\$75,604	\$70,452	\$71,595	\$78,811
99	Unclassified Industry	\$52,637	\$33,532	Insf. Data	\$30,062	\$27,828
<b>Total</b>		<b>\$59,072</b>	<b>\$54,072</b>	<b>\$50,945</b>	<b>\$55,989</b>	<b>\$59,204</b>

Source: Emsi

## SECTOR CONCENTRATION

- ◆ Green boxes in the table below demonstrate that there is a high concentration of businesses in that sector in the region.
- ◆ The region’s most concentrated industry is the Agriculture/Forestry/Fishing sector.
- ◆ Essex, Hamilton, and Warren counties exhibit a concentration of Arts, Entertainment, and Recreation.

Table 11

LCLG Region Sector Concentration, 2-Digit NAICS

NAICS	Description	Clinton County	Essex County	Hamilton County	Warren County	Washington County	LCLG Region
11	Agriculture, Forestry, Fishing and Hunting	3.27	1.24	1.23	0.37	3.11	1.88
21	Mining, Quarrying, and Oil and Gas Extraction	0.17	1.31	0.00	0.76	1.86	0.80
22	Utilities	0.96	0.45	0.26	1.43	0.31	0.94
23	Construction	0.87	0.94	1.11	0.78	1.13	0.89
31	Manufacturing	1.15	0.72	0.20	1.05	1.94	1.16
42	Wholesale Trade	0.54	0.53	0.85	0.58	0.55	0.56
44	Retail Trade	1.41	1.13	1.13	1.38	1.16	1.32
48	Transportation and Warehousing	1.10	0.25	0.62	0.34	0.39	0.59
51	Information	0.52	0.67	0.30	1.05	0.40	0.71
52	Finance and Insurance	0.31	0.50	0.08	0.83	0.31	0.52
53	Real Estate and Rental and Leasing	0.73	0.55	0.73	0.63	0.37	0.61
54	Professional, Scientific, and Technical Services	0.41	0.28	0.14	0.58	0.27	0.42
55	Management of Companies and Enterprises	0.15	0.24	0.18	1.03	0.07	0.47
56	Administrative and Support and Waste Management and Remediation Services	0.58	0.29	0.33	1.06	0.64	0.71
61	Educational Services	0.35	1.14	0.31	0.42	0.14	0.46
62	Health Care and Social Assistance	1.24	0.94	0.17	1.21	0.84	1.11
71	Arts, Entertainment, and Recreation	0.52	1.90	3.97	1.97	0.99	1.37
72	Accommodation and Food Services	0.93	1.81	1.51	1.61	0.46	1.24
81	Other Services (except Public Administration)	0.73	0.94	1.33	0.99	0.81	0.88
90	Government	1.53	1.75	2.63	0.82	2.00	1.40

Source: Emsi

\*Green indicates higher industry concentration while red indicates lower industry concentration.

### Location Quotient

Location Quotient (LQ) is a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study, relative to the nation. It can reveal what makes a region “unique” in comparison with the national average. A location quotient greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.



## SECTOR OUTPUT

- ◆ Government; Manufacturing; Health Care and Social Assistance; and Retail Trade are the biggest contributors to the region's GRP.
- ◆ Government is important across all economies in the LCLG Region, and Manufacturing is also particularly for Washington County and Warren County.

Table 12

### LCLG Region Sector Contribution to GRP, 2-Digit NAICS

NAICS	Description	Clinton County	Essex County	Hamilton County	Warren County	Washington County	<b>LCLG Region</b>
11	Agriculture, Forestry, Fishing and Hunting	3.1%	1.1%	1.0%	0.4%	3.3%	<b>1.8%</b>
21	Mining, Quarrying, and Oil and Gas Extraction	0.2%	1.1%	0.4%	0.9%	1.6%	<b>0.8%</b>
22	Utilities	2.9%	1.3%	0.5%	3.5%	0.8%	<b>2.5%</b>
23	Construction	6.1%	4.7%	4.5%	4.4%	5.7%	<b>5.2%</b>
31	Manufacturing	13.8%	13.7%	1.8%	15.5%	24.4%	<b>15.9%</b>
42	Wholesale Trade	3.6%	2.4%	7.5%	5.4%	3.0%	<b>4.0%</b>
44	Retail Trade	10.6%	8.6%	9.6%	9.8%	9.4%	<b>9.8%</b>
48	Transportation and Warehousing	3.5%	1.4%	2.2%	1.2%	2.0%	<b>2.1%</b>
51	Information	2.1%	2.3%	0.7%	4.2%	1.3%	<b>2.8%</b>
52	Finance and Insurance	3.2%	4.8%	0.9%	8.6%	2.9%	<b>5.3%</b>
53	Real Estate and Rental and Leasing	2.4%	3.8%	5.1%	3.1%	2.4%	<b>2.9%</b>
54	Professional, Scientific, and Technical Services	2.6%	2.7%	1.8%	4.4%	1.9%	<b>3.1%</b>
55	Management of Companies and Enterprises	0.1%	0.3%	1.0%	1.3%	0.1%	<b>0.6%</b>
56	Administrative and Support and Waste Management and Remediation Services	2.5%	1.1%	1.2%	3.6%	2.6%	<b>2.7%</b>
61	Educational Services	0.4%	1.4%	0.5%	0.4%	0.2%	<b>0.5%</b>
62	Health Care and Social Assistance	12.5%	8.3%	1.8%	12.0%	5.6%	<b>10.5%</b>
71	Arts, Entertainment, and Recreation	0.5%	2.1%	5.4%	1.7%	0.8%	<b>1.3%</b>
72	Accommodation and Food Services	3.6%	11.0%	12.4%	8.2%	1.8%	<b>6.2%</b>
81	Other Services (except Public Administration)	1.6%	2.5%	3.0%	2.0%	2.2%	<b>2.0%</b>
90	Government	24.7%	25.6%	38.7%	9.6%	28.0%	<b>20.0%</b>

Source: Emsi

\*Darker green indicates higher percentages.

## INDUSTRY EMPLOYMENT – 4-DIGIT NAICS

- ◆ The largest industry by employment at the 4-digit NAICS level is Education and Hospitals (Local Government) (8,393 jobs). This is followed by Restaurants and Other Eating Places (7,070 jobs).
- ◆ Of the top 20 industries, nearly half have lost jobs over the past five years, particularly Pulp, Paper, and Paperboard Mills which lost 487 jobs.

Table 13

### LCLG Region Top 20 Industries by 2020 Jobs, 4-Digit NAICS

NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Avg. Earnings Per Job
9036	Education and Hospitals (Local Government)	8,356	8,393	37	0%	\$75,103
7225	Restaurants and Other Eating Places	6,813	7,070	257	4%	\$24,385
9039	Local Government, Excluding Education and Hospitals	6,582	6,381	(201)	(3%)	\$62,188
9029	State Government, Excluding Education and Hospitals	5,445	5,684	239	4%	\$106,667
6221	General Medical and Surgical Hospitals	4,433	4,408	(25)	(1%)	\$78,060
7211	Traveler Accommodation	3,549	3,425	(124)	(4%)	\$33,046
5613	Employment Services	2,791	2,421	(369)	(13%)	\$39,723
4451	Grocery Stores	2,440	2,246	(194)	(8%)	\$31,135
6211	Offices of Physicians	2,223	2,086	(138)	(6%)	\$96,692
6241	Individual and Family Services	1,386	1,956	571	41%	\$38,159
6231	Nursing Care Facilities (Skilled Nursing Facilities)	2,122	1,815	(307)	(14%)	\$44,143
3221	Pulp, Paper, and Paperboard Mills	2,192	1,705	(487)	(22%)	\$89,932
3391	Medical Equipment and Supplies Manufacturing	1,448	1,634	186	13%	\$85,266
4441	Building Material and Supplies Dealers	1,391	1,628	237	17%	\$48,653
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,739	1,614	(125)	(7%)	\$32,714
5617	Services to Buildings and Dwellings	1,242	1,537	295	24%	\$31,680
9026	Education and Hospitals (State Government)	1,078	1,503	425	39%	\$68,334
2382	Building Equipment Contractors	1,118	1,417	299	27%	\$67,612
4471	Gasoline Stations	1,289	1,378	89	7%	\$29,950
4411	Automobile Dealers	1,300	1,341	41	3%	\$61,216

Source: Emsi



## INDUSTRY EMPLOYMENT – 6-DIGIT NAICS

- ◆ Employment in the top 4-digit industries is driven by the following subindustries: Elementary and Secondary Schools; Local Government; State Government (driven in part by State University of New York); General Medical and Surgical Hospitals (driven in part by Glens Falls Hospital); and Full-Service Restaurants.
- ◆ Average earnings per job are highest in State Government at over \$106,000.

Table 14

### LCLG Region Top 10 Industries by 2020 Jobs, 6-Digit NAICS

NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Avg. Earnings Per Job
903611	Elementary and Secondary Schools (Local Government)	7,449	7,702	253	3%	\$77,255
903999	Local Government, Excluding Education and Hospitals	6,582	6,381	(201)	(3%)	\$62,188
902999	State Government, Excluding Education and Hospitals	5,445	5,684	239	4%	\$106,667
622110	General Medical and Surgical Hospitals	4,433	4,408	(25)	(1%)	\$78,060
722511	Full-Service Restaurants	4,143	4,266	123	3%	\$25,786
721110	Hotels (except Casino Hotels) and Motels	3,435	3,288	(147)	(4%)	\$33,383
722513	Limited-Service Restaurants	2,178	2,252	74	3%	\$22,058
445110	Supermarkets and Other Grocery (except Convenience) Stores	2,294	2,098	(196)	(9%)	\$31,670
621111	Offices of Physicians (except Mental Health Specialists)	2,205	2,057	(148)	(7%)	\$96,133
623110	Nursing Care Facilities (Skilled Nursing Facilities)	2,122	1,815	(307)	(14%)	\$44,143

Source: Emsi

## INDUSTRY CONCENTRATION

- ◆ Pulp, Paper, and Paperboard Mills is the most concentrated industry, with an LQ of 26.04 (though the industry is losing jobs).
- ◆ Of the 12 industries with the highest LQs, six have experienced job losses over the last five years.

Table 15

### LCLG Region Top Concentrated Industries, 4-Digit NAICS

NAICS	Description	Location Quotient	2020 Jobs	2015-2020 Job Change
3221	Pulp, Paper, and Paperboard Mills	26.04	1,705	(487)
7212	RV (Recreational Vehicle) Parks and Recreational Camps	12.68	619	46
3365	Railroad Rolling Stock Manufacturing	12.09	199	(92)
3271	Clay Product and Refractory Manufacturing	8.56	244	Insf. Data
3391	Medical Equipment and Supplies Manufacturing	7.16	1,634	186
3351	Electric Lighting Equipment Manufacturing	5.90	183	(124)
3161	Leather and Hide Tanning and Finishing	5.81	17	1
2123	Nonmetallic Mineral Mining and Quarrying	5.01	343	(39)
1133	Logging	4.74	229	(45)
5323	General Rental Centers	4.31	107	27
1120	Animal Production	3.89	1,148	(14)
9029	State Government, Excluding Education and Hospitals	3.67	5,684	239

Source: Emsi



## INDUSTRY JOB CHANGE

- ◆ Since 2015, Individual and Family Services has added the most jobs, adding 571. This is followed by Education and Hospitals (State Government) (425).
- ◆ Pulp, Paper, and Paperboard Mills and Employment Services have shed the most jobs over this period, losing 487 and 369 respectively.

Table 16

LCLG Region Top Growing and Shrinking Industries, 4-Digit NAICS

NAICS	Description	2015 Jobs	2020 Jobs	2015 - 2020 Change	2015 - 2020 % Change	Avg. Earnings Per Job	Location Quotient
<b>Growing</b>							
6241	Individual and Family Services	1,386	1,956	571	41%	\$38,159	1.03
9026	Education and Hospitals (State Government)	1,078	1,503	425	39%	\$68,334	0.69
2382	Building Equipment Contractors	1,118	1,417	299	27%	\$67,612	0.82
5617	Services to Buildings and Dwellings	1,242	1,537	295	24%	\$31,680	0.76
7225	Restaurants and Other Eating Places	6,813	7,070	257	4%	\$24,385	0.95
9029	State Government, Excluding Education and Hospitals	5,445	5,684	239	4%	\$106,667	3.67
4441	Building Material and Supplies Dealers	1,391	1,628	237	17%	\$48,653	2.05
5419	Other Professional, Scientific, and Technical Services	665	861	196	29%	\$43,588	1.39
6214	Outpatient Care Centers	456	645	189	42%	\$57,420	0.92
3391	Medical Equipment and Supplies Manufacturing	1,448	1,634	186	13%	\$85,266	7.16
<b>Shrinking</b>							
3221	Pulp, Paper, and Paperboard Mills	2,192	1,705	(487)	(22%)	\$89,932	26.04
5613	Employment Services	2,791	2,421	(369)	(13%)	\$39,723	0.99
3273	Cement and Concrete Product Manufacturing	442	113	(328)	(74%)	\$86,201	0.84
6231	Nursing Care Facilities (Skilled Nursing Facilities)	2,122	1,815	(307)	(14%)	\$44,143	1.67
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	325	112	(213)	(66%)	\$64,205	0.63
9039	Local Government, Excluding Education and Hospitals	6,582	6,381	(201)	(3%)	\$62,188	1.62
4451	Grocery Stores	2,440	2,246	(194)	(8%)	\$31,135	1.22
7223	Special Food Services	759	583	(176)	(23%)	\$25,417	0.99
3222	Converted Paper Product Manufacturing	302	141	(160)	(53%)	\$68,483	0.77
6211	Offices of Physicians	2,223	2,086	(138)	(6%)	\$96,692	1.11

Source: Emsi

## GROWING AND CONCENTRATED INDUSTRIES, 6-DIGIT NAICS

- ◆ Industries that already have a job presence in the region, have added jobs over the last five years, and have a LQ over 2.0 include Recreational and Vacation Camps; Surgical and Medical Instrument Manufacturing; Residential Intellectual and Developmental Disability Facilities; State Government; and Other Building Material Dealers.

Table 17

### Growing and Concentrated Industries in the LCLG Region

NAICS	Description	2015 Jobs	2020 Jobs	2015- 2020 Change	2015- 2020 % Change	Avg. Earnings Per Job	Location Quotient
721214	Recreational and Vacation Camps (except Campgrounds)	455	482	27	6%	\$36,533	19.03
339112	Surgical and Medical Instrument Manufacturing	1,420	1,539	119	8%	\$86,512	16.73
623210	Residential Intellectual and Developmental Disability Facilities	1,002	1,093	91	9%	\$42,675	3.87
902999	State Government, Excluding Education and Hospitals	5,445	5,684	239	4%	\$106,667	3.67
444190	Other Building Material Dealers	470	607	137	29%	\$63,875	3.54

Source: Emsi

Industries listed above are those that have more than 250 jobs in the region, have added jobs over the last five years, and have location quotients greater than 2.0.

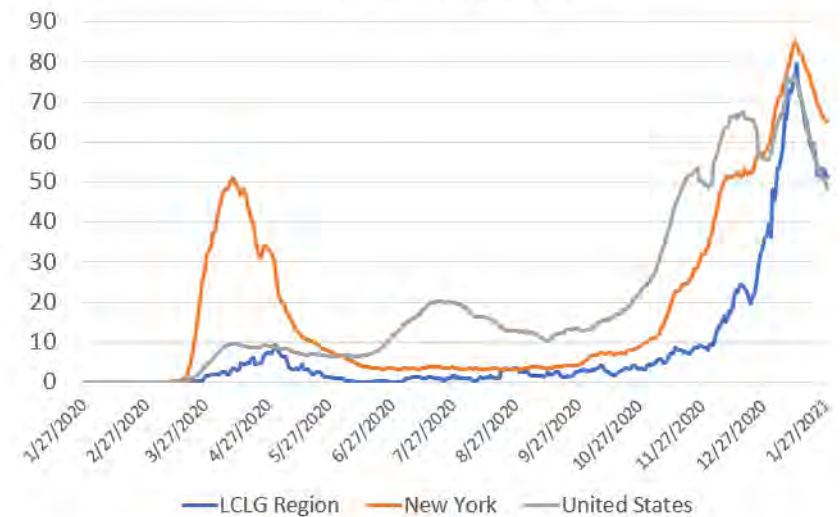


## COVID-19 TRENDS

- ◆ The rate of new COVID-19 cases in the LCLG Region remained below the state's and nation's new case rate throughout 2020. However, cases spiked during the holidays. New case levels peaked mid-January and have since fallen to where they were at the turn of the year, on par with the nation's new case rate and below New York's new case rate.
- ◆ Although the LCLG Region has a smaller total death rate than the state's and the nation's, the total death rate is still ticking up (this reflects the deaths from cases reported over the holidays).

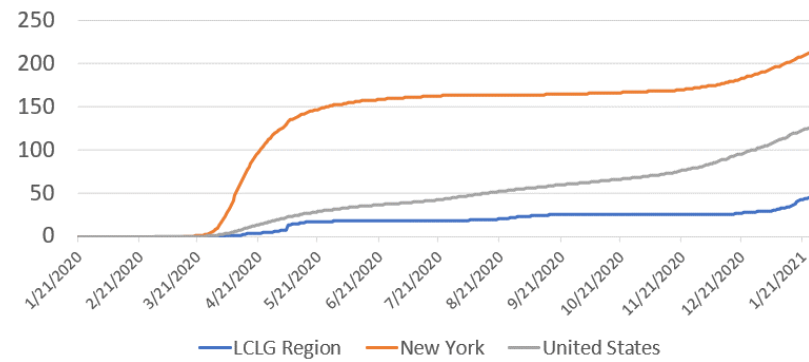
Figure 7

New Confirmed COVID-19 Cases per 100,000 People, 7-Day Moving Average



Source: Opportunity Insights ; <https://tracktherecovery.org/>; staff calculations  
 Note: Data is through January 28th.

Total COVID-19 Deaths per 100,000 People, 7-Day Moving Average



Source: Opportunity Insights, <https://tracktherecovery.org/>; staff calculations.  
 Note: Data is through January 28th.

## COVID-19 IMPLICATIONS: UNEMPLOYMENT

- ◆ County-level unemployment rates in the LCLG Region remain slightly elevated compared to December 2019 levels.
- ◆ Unemployment rates in the region have increased less than they have in New York and the U.S. (which have increased by 4.3% and 3.2%, respectively). The unemployment rate in Hamilton County decreased by 3.5%.

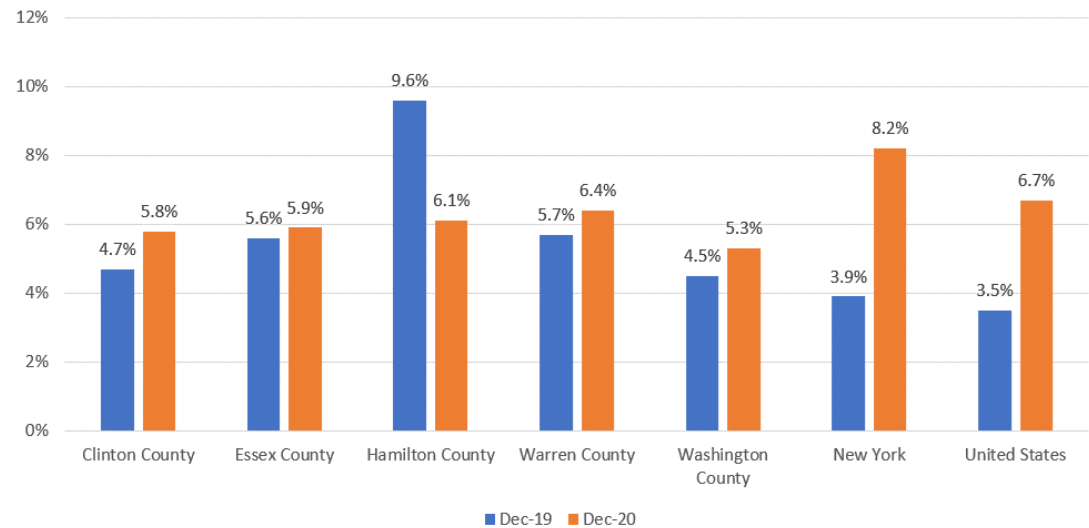
Table 18

Unemployment Comparison			
County	Dec-19	Dec-20	Difference
Clinton County	4.7%	5.8%	1.1%
Essex County	5.6%	5.9%	0.3%
Hamilton County	9.6%	6.1%	-3.5%
Warren County	5.7%	6.4%	0.7%
Washington County	4.5%	5.3%	0.8%
New York	3.9%	8.2%	4.3%
United States	3.5%	6.7%	3.2%

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics/FRED

Figure 9

Unemployment Rate: 2019-2020 Comparison



Source: Bureau of Labor Statistics, Local Area Unemployment Statistics/FRED  
 Note: County unemployment rates are not seasonally adjusted.

## REGIONAL UNEMPLOYMENT BY SECTOR – OCTOBER 2020

- ◆ In the LCLG Region, Accommodation and Food Services and Retail Trade accounted for the largest portion of regional unemployment, accounting for 21% and 18% of the total, respectively. This matches the current economic environment around COVID-19 where many in-person activities are reduced for health and safety purposes.
- ◆ Unemployment levels in the LCLG Region are similar to national levels except for Accommodation and Food Services and Retail Trade. For both, the share of regional unemployment is six percent higher compared to the national levels.

Table 19

### LCLG Region Unemployment by Industry

NAICS	Industry	Unemployed (10/2020)	% of Regional Unemployment	% of National Unemployment
11	Agriculture, Forestry, Fishing and Hunting	37	1%	1%
21	Mining, Quarrying, and Oil and Gas Extraction	19	0%	1%
22	Utilities	3	0%	0%
23	Construction	365	6%	6%
31	Manufacturing	593	10%	9%
42	Wholesale Trade	130	2%	3%
44	Retail Trade	1,064	18%	12%
48	Transportation and Warehousing	238	4%	5%
51	Information	73	1%	2%
52	Finance and Insurance	41	1%	2%
53	Real Estate and Rental and Leasing	49	1%	2%
54	Professional, Scientific, and Technical Services	95	2%	4%
55	Management of Companies and Enterprises	12	0%	1%
56	Administrative and Support and Waste Management and Remediation Services	503	8%	10%
61	Educational Services	60	1%	4%
62	Health Care and Social Assistance	811	14%	13%
71	Arts, Entertainment, and Recreation	213	4%	3%
72	Accommodation and Food Services	1,275	21%	15%
81	Other Services (except Public Administration)	263	4%	4%
90	Government	108	2%	2%
99	No Previous Work Experience/Unspecified	0	0%	0%

Source: Emsi



## COVID-19 IMPLICATIONS: ECONOMIC ACTIVITY

- ◆ Total sales tax revenue decreased by 0.9% from 2019 to 2020. New York fared worse with a 10% decline over the same period.
- ◆ Total sales decreased the most in Clinton County (by -3.2%), while Essex County saw a one percent increase in revenue and Washington County realized a 3.3% increase in revenue.
- ◆ Total taxable sales/purchases for restaurants, bars, and other food services declined more sharply for the state (over 40%) than the region (about 20%) last summer.

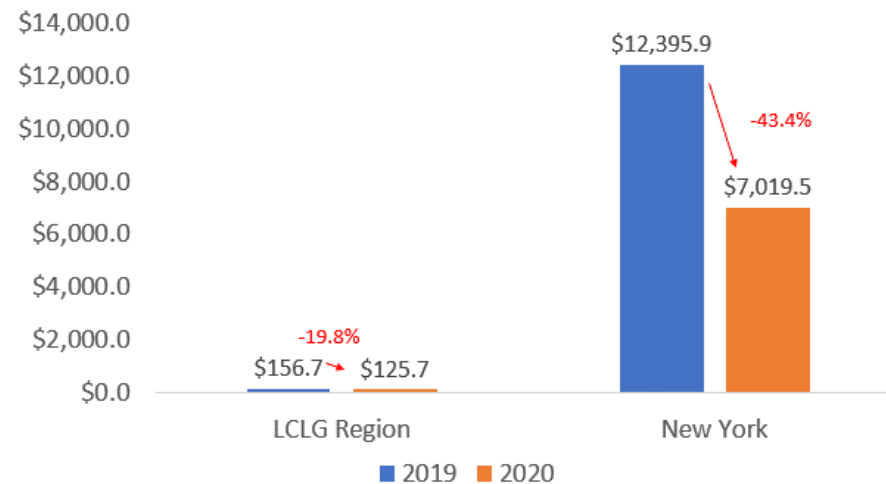
Table 20

Total Sales Tax Collections (Mil. \$)			
Area	2019	2020	Percent Change
Clinton County	\$59.4	\$57.5	-3.2%
Essex County	\$31.8	\$32.1	1.0%
Hamilton County	\$4.3	\$4.2	-1.8%
Warren County	\$56.3	\$55.6	-1.2%
Washington County	\$21.9	\$22.6	3.3%
LCLG Region	\$173.6	\$172.1	-0.9%
New York	\$18,283.2	\$16,460.3	-10.0%

Source: Office of the New York State Comptroller

Figure 10

### Restaurants, Bars, Other Food Services: Taxable Sales and Purchases, Jun-Aug (Mil. \$)



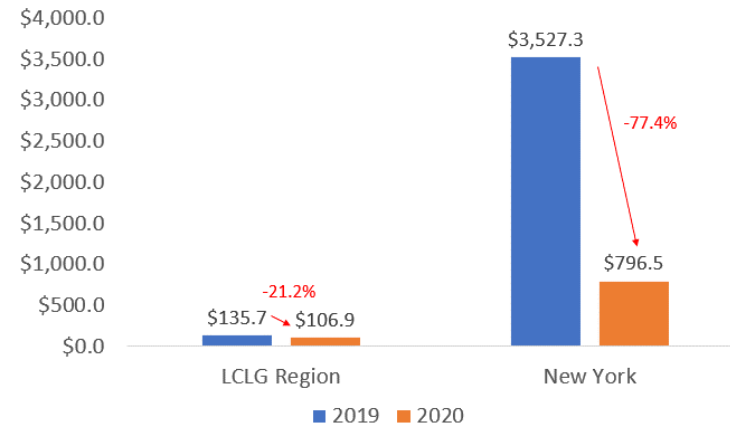
Source: New York State Department of Taxation and Finance

## COVID-19 IMPLICATIONS: ECONOMIC ACTIVITY, CONTINUED

- ◆ Total taxable sales and purchases for the travel accommodations sector decreased more sharply for the state (nearly 80%) than the region (slightly over 20%) last summer.
- ◆ Taxable sales and purchases for retail trade in summer 2020 surpassed 2019 levels in the LCLG Region and New York State.

Figure 11

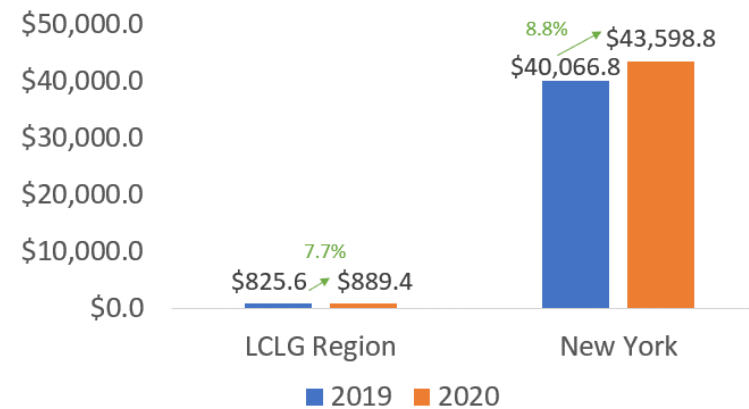
Travel Accommodations: Taxable Sales and Purchases, Jun-Aug (Mil. \$)



Source: New York State Department of Taxation and Finance

Figure 12

Purchases, Jun-Aug (Mil. \$)



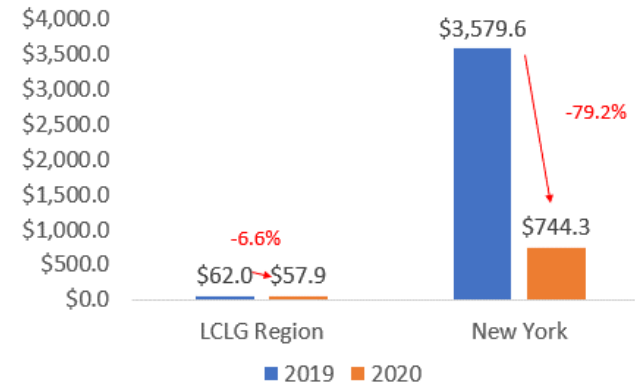
Source: New York State Department of Taxation and Finance

## COVID-19 IMPLICATIONS: ECONOMIC ACTIVITY, CONTINUED

- ◆ Total taxable sales and purchases for the travel accommodations sector decreased more sharply for the state (nearly 80%) than the region (about 7%) last fall.
- ◆ Total taxable sales/purchases for restaurants, bars, and other food services declined more sharply for the state (about 36%) than the region (10%) last fall.
- ◆ Taxable sales and purchases for retail trade in fall 2020 surpassed 2019 levels in the LCLG Region and New York State.

Figure 13

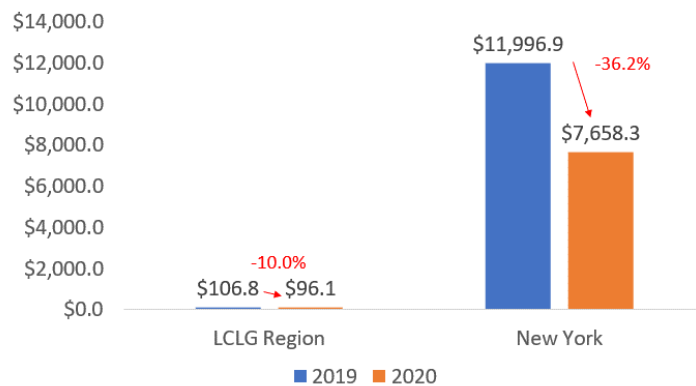
Travel Accommodations: Taxable Sales and Purchases, Sept-Nov (Mil. \$)



Source: New York State Department of Taxation and Finance

Figure 14

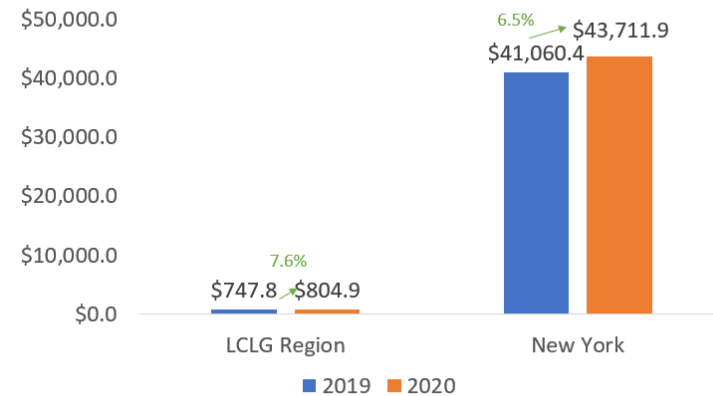
Restaurants, Bars, Other Food Services: Taxable Sales and Purchases, Sept-Nov (Mil. \$)



Source: New York State Department of Taxation and Finance

Figure 15

Retail Trade: Taxable Sales and Purchases, Sept-Nov (Mil. \$)



Source: New York State Department of Taxation and Finance



# AGRICULTURAL SNAPSHOT



*Chazy Orchards, Clinton County*

## REGIONAL AGRICULTURE OVERVIEW

- ◆ As of 2017, there were 415,536 acres of farmland across 1,882 farms in the region. Clinton and Washington Counties make up the highest percentage of state agricultural sales for counties in the region.
- ◆ Since 2012, the number of individual farms has decreased in all counties except Essex and Washington Counties. The total farm acreage, however, has increased in every county except Hamilton and Washington counties.
- ◆ Over the 2012-2017 period, the average acreage of farms has decreased in three of the five counties.
- ◆ Clinton and Essex Counties have experienced the biggest positive change in the market value of products sold since 2012, increasing by 13% each. Washington County experienced a slight drop over this period in the value of products sold, decreasing by 2%.

Table 21

### LCLG Region Agriculture Overview, 2017

	Number of Farms		Land in Farms (Acres)		Average Size of Farm (acres)		Market Value of Products Sold		Percent of State Ag Sales	
	#	% Change Since 2012	#	% Change Since 2012	#	% Change Since 2012	#	% Change Since 2012	%	
Clinton County	588	-2%	161,605	10%	275	13%	\$167,789,000	13%	3%	
Essex County	285	9%	57,622	5%	202	-4%	\$13,178,000	13%	<0.5%	
Hamilton County	14	-46%	932	-55%	67	-17%	NA	NA	NA	
Warren County	80	-32%	10,086	6%	126	55%	\$1,916,000	NA	<0.5%	
Washington County	915	8%	185,291	-2%	203	-9%	\$135,813,000	-2%	3%	
<b>Total</b>	<b>1,882</b>		<b>415,536</b>							

Source: USDA 2017 National Agriculture Census

## REGIONAL FARM PRODUCTS

- ◆ Most farmland in Clinton and Washington Counties is used as cropland. The majority of farmland in Warren County and the plurality in Essex County, however, is woodland.
- ◆ The majority of agricultural sales in Clinton and Washington Counties are livestock, poultry and products.
- ◆ A majority of agricultural sales in Essex County are crops.

Table 22

**LCLG Region Land in Farms by Use, 2017**

	Clinton County	Essex County	Hamilton County	Warren County	Washington County
Cropland	53%	39%	5%	9%	56%
Pastureland	7%	13%	0%	7%	12%
Woodland	32%	40%	NA	74%	26%
Other	7%	8%	NA	10%	6%

Source: USDA 2017 National Agriculture Census

Figure 16

### Share of Agricultural Sales by Type, 2017



Source: USDA 2017 National Agriculture Census

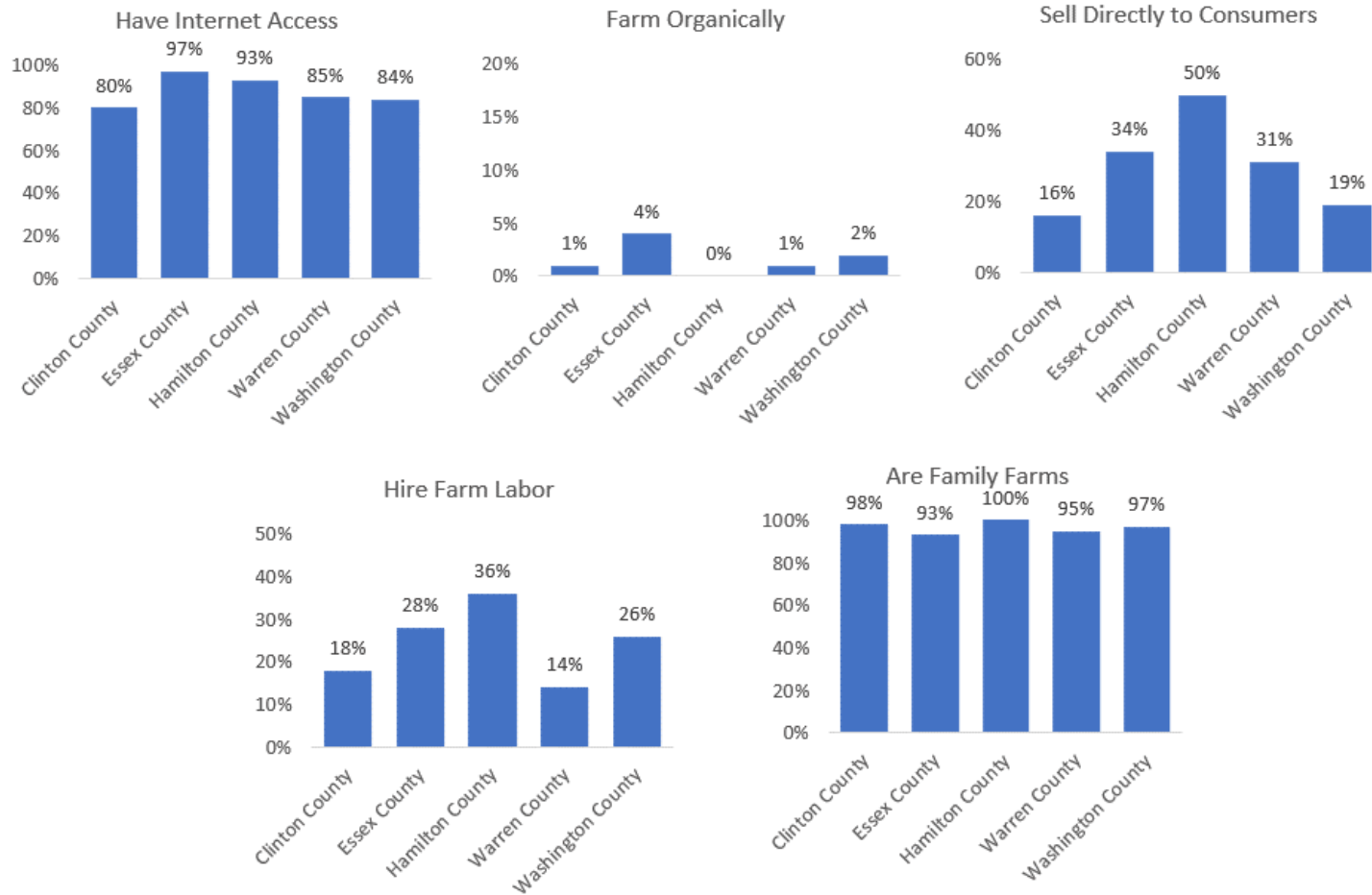
\*Note that data for Hamilton County and Warren County are N/A.



## REGIONAL FARM CHARACTERISTICS

Figure 17

The Percentage of Farms That:



Source: USDA 2017 National Agriculture Census; Data is as of 2017.

## TOP REGIONAL CROPS

Tables 23-26

### Top Crops in Acres: LCLG Region

<b>Clinton County</b>	
Crop	# of Acres
Forage (hay/haylage), all	37,445
Corn for silage or greenchop	13,355
Corn for grain	10,163
Apples	3,283
Oats for grain	826

<b>Warren County</b>	
Crop	# of Acres
Forage (hay/haylage), all	505
Cultivated Christmas trees	70
Corn for silage or greenchop	NA
Vegetables harvested, all	22
Nursery stock crops	8

<b>Essex County</b>	
Crop	# of Acres
Forage (hay/haylage), all	15,439
Corn for silage or greenchop	965
Soybeans for beans	NA
Corn for grain	614
Sorghum for silage/greenchop	252

<b>Washington County</b>	
Crop	# of Acres
Forage (hay/haylage), all	59,252
Corn for silage or greenchop	20,585
Corn for grain	5,082
Vegetables harvested, all	918
Sweet corn	574

Source: USDA 2017 National Agriculture Census

Note: Top crops in acres data is not available for Hamilton County.

## YOUNG PRODUCERS

- ◆ The USDA considers “Producers” as an individual who is involved in making decisions about farm operations. Young producers are those that are 35 years or younger. Farms with Young Producers make up anywhere from 6%-19% of total farms across the 5-county region.
- ◆ Across the state, young producers make up 15% of farms, which is higher than the figure for the nation, 12%.
- ◆ The future of farming in the region is dependent on Young producers remaining active in the industry, as well as recruiting others to carry on agricultural production.

Table 27

### Farms With Young Producers

	Farms		Young Producers
	#	% of Total	#
Clinton County	69	12%	92
Essex County	54	19%	68
Warren County	5	6%	5
Washington County	111	12%	146
New York State	4,853	15%	6,718
United States	240,121	12%	321,261

Source: USDA 2017 National Agriculture Census

Note: Young producer data is not available for Hamilton County.



# TALENT AND WORKFORCE EVALUATION



*West Mountain, Warren County*

## OCCUPATIONS BY 2-DIGIT SOC

- ◆ Office and Administrative Support occupations are prevalent in the region, accounting for 12% of 2020 jobs. The number of these jobs in the region, however, has decreased by nearly 1,000 in the last five years.
- ◆ Business and Financial Operations occupations and Healthcare Practitioners and Technical occupations grew the most over the last five years, adding 541 and 532 jobs respectively.

Table 28

LCLG Region Occupations by 2-Digit SOC

SOC	Description	2015 Jobs	2020 Jobs	% of 2020 Jobs	2015-2020 Change	2015-2020 % Change	Median Annual Earnings	Location Quotient	Number of Unemployed Oct 2020
11-0000	Management Occupations	5,399	5,502	5%	103	2%	\$86,024.87	0.82	442
13-0000	Business and Financial Operations Occupations	2,985	3,526	3%	541	18%	\$59,531.96	0.56	54
15-0000	Computer and Mathematical Occupations	1,034	1,118	1%	84	8%	\$67,940.43	0.33	15
17-0000	Architecture and Engineering Occupations	987	1,021	1%	34	3%	\$71,477.08	0.54	37
19-0000	Life, Physical, and Social Science Occupations	741	697	1%	(44)	(6%)	\$65,347.67	0.71	15
21-0000	Community and Social Service Occupations	2,275	2,634	2%	360	16%	\$47,025.02	1.35	78
23-0000	Legal Occupations	632	595	1%	(37)	(6%)	\$88,097.15	0.63	12
25-0000	Educational Instruction and Library Occupations	7,744	7,770	7%	26	0%	\$52,940.22	1.22	180
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,636	1,630	1%	(6)	(0%)	\$40,328.86	0.78	80
29-0000	Healthcare Practitioners and Technical Occupations	6,618	7,149	6%	532	8%	\$62,248.66	1.14	123
31-0000	Healthcare Support Occupations	6,533	6,395	6%	(137)	(2%)	\$29,734.19	1.32	282
33-0000	Protective Service Occupations	4,328	4,257	4%	(71)	(2%)	\$59,559.23	1.68	158
35-0000	Food Preparation and Serving Related Occupations	10,268	10,649	9%	381	4%	\$27,277.51	1.14	962
37-0000	Building and Grounds Cleaning and Maintenance Occupations	4,971	4,559	4%	(412)	(8%)	\$28,953.12	1.12	257
39-0000	Personal Care and Service Occupations	2,879	3,249	3%	370	13%	\$27,925.71	0.99	420
41-0000	Sales and Related Occupations	11,511	10,944	10%	(567)	(5%)	\$27,416.82	1.00	616
43-0000	Office and Administrative Support Occupations	14,446	13,507	12%	(940)	(7%)	\$36,112.90	0.94	625
45-0000	Farming, Fishing, and Forestry Occupations	1,348	1,311	1%	(37)	(3%)	\$32,047.97	1.55	33
47-0000	Construction and Extraction Occupations	5,800	5,999	5%	199	3%	\$45,130.42	1.12	389
49-0000	Installation, Maintenance, and Repair Occupations	5,234	5,542	5%	308	6%	\$43,149.36	1.26	219
51-0000	Production Occupations	7,535	7,577	7%	42	1%	\$36,599.18	1.17	588
53-0000	Transportation and Material Moving Occupations	7,420	7,394	7%	(26)	(0%)	\$32,971.72	0.80	356
55-0000	Military-only occupations	200	187	0%	(13)	(7%)	\$38,332.95	0.29	<10
<b>Total</b>		<b>112,525</b>	<b>113,215</b>	<b>100%</b>	<b>690</b>	<b>1%</b>			<b>5,950</b>

Source: Emsi

## OCCUPATIONS BY 6-DIGIT SOC

- ◆ Except for Registered Nurses, the top occupations in the region do not require advanced degrees.
- ◆ Other top occupations include Retail Salespersons, Cashiers, and Fast Food and Counter Workers.

Table 29

**Top 10 6-Digit SOC Occupations, LCLG Region**

SOC	Description	2020 Jobs	Median Annual Earnings	Typical Entry Level Education	Work Experience Required	Typical On-The- Job Training
31-1128	Home Health and Personal Care Aides	4,306	\$27,443.59	High school diploma or equivalent	None	Short-term
41-2031	Retail Salespersons	3,629	\$26,279.42	No formal educational credential	None	Short-term
41-2011	Cashiers	3,198	\$24,611.42	No formal educational credential	None	Short-term
35-3023	Fast Food and Counter Workers	2,717	\$26,053.28	No formal educational credential	None	Short-term
29-1141	Registered Nurses	2,250	\$69,435.52	Bachelor's degree	None	None
33-3012	Correctional Officers and Jailers	2,248	\$61,680.81	High school diploma or equivalent	None	Moderate-term
35-3031	Waiters and Waitresses	2,214	\$28,211.15	No formal educational credential	None	Short-term
43-9061	Office Clerks, General	1,823	\$29,926.36	High school diploma or equivalent	None	Short-term
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,770	\$29,565.45	No formal educational credential	None	Short-term
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,764	\$36,838.18	High school diploma or equivalent	None	Short-term

Source: Emsi

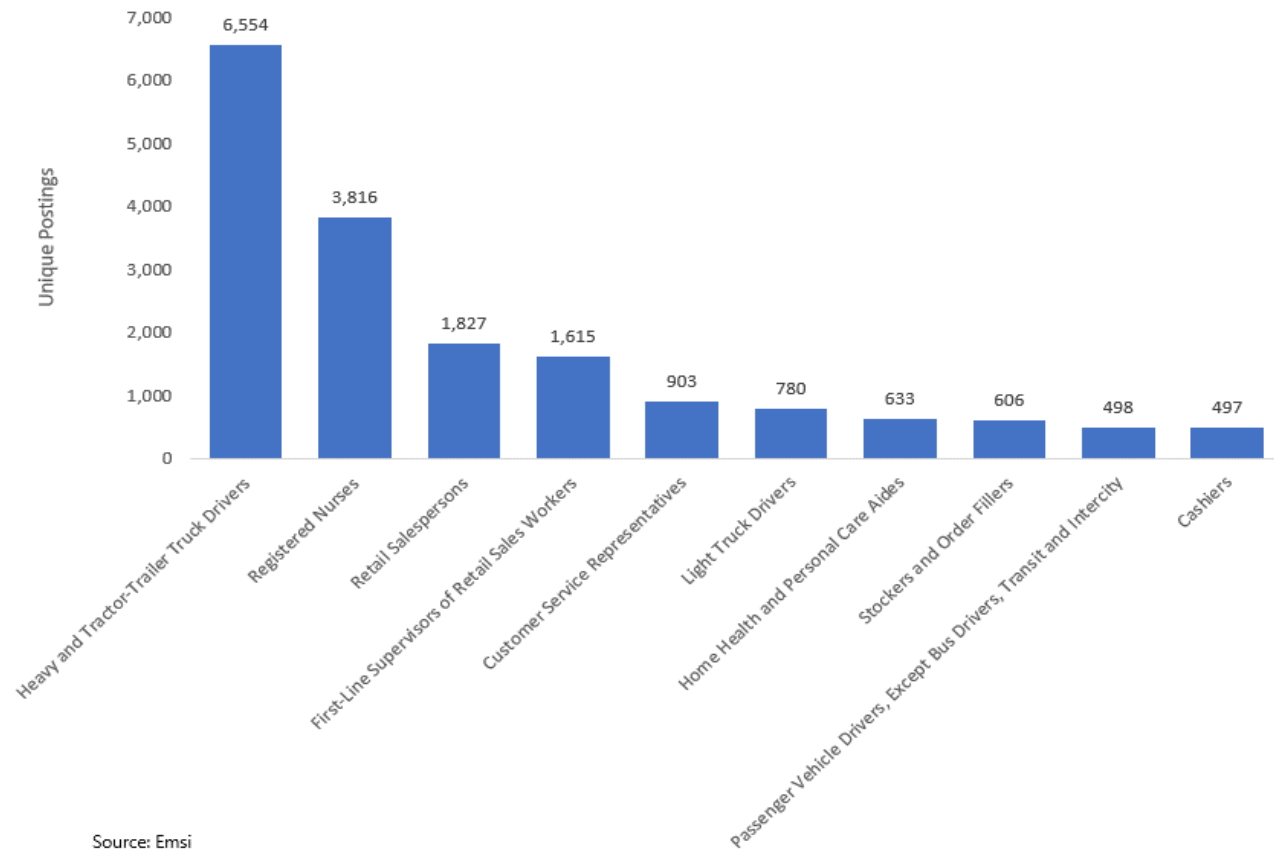


## TOP POSTED OCCUPATIONS

- ◆ Most job postings in the LCLG Region were recruiting for Heavy and Tractor-Trailer Truck Drivers and Registered Nurses.

Figure 18

Top 10 Posted Occupations, LCLG Region, December 2019-2020



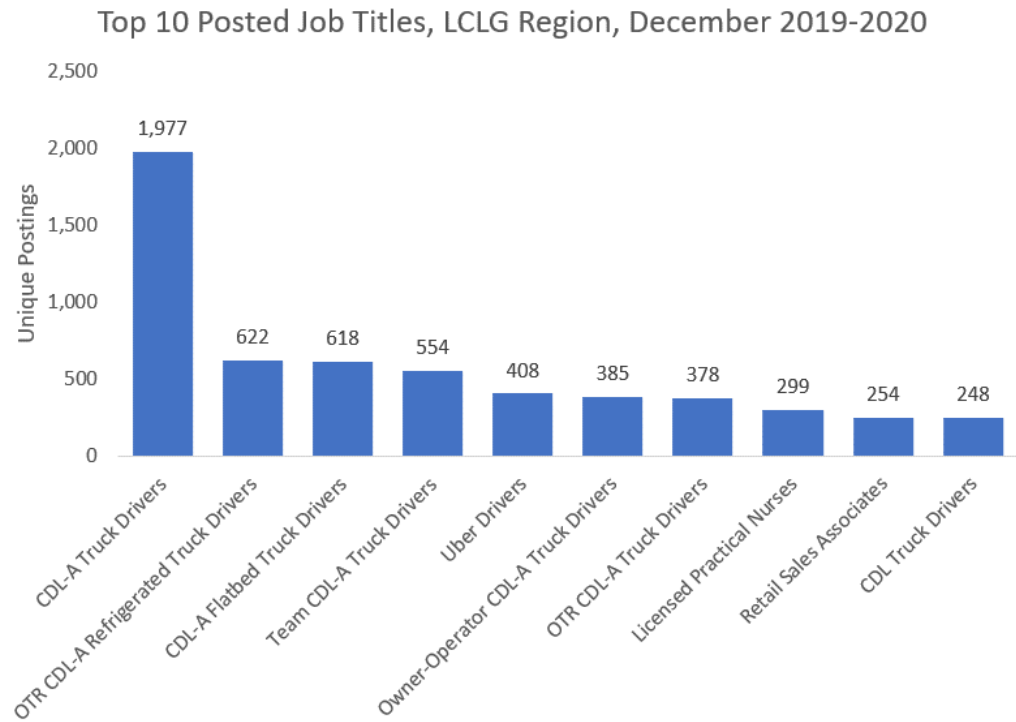
The prevalence of Heavy and Tractor-Trailer Truck Drivers in postings reflects national trends. With high turnover and the increase of distribution centers for online retail, the industry remains high on job postings across the country.

Source: Emsi

## TOP POSTED JOB TITLES

- ◆ Class-A Commercial Driver's License (CDL) Truck Drivers were the top posted roles in 2020; other CDL Truck Driver-related roles also make up the majority of the top 10. Uber Drivers, Licensed Practical Nurses and Retail Sales Associates are the top non-CDL Truck Driving roles.

Figure 19

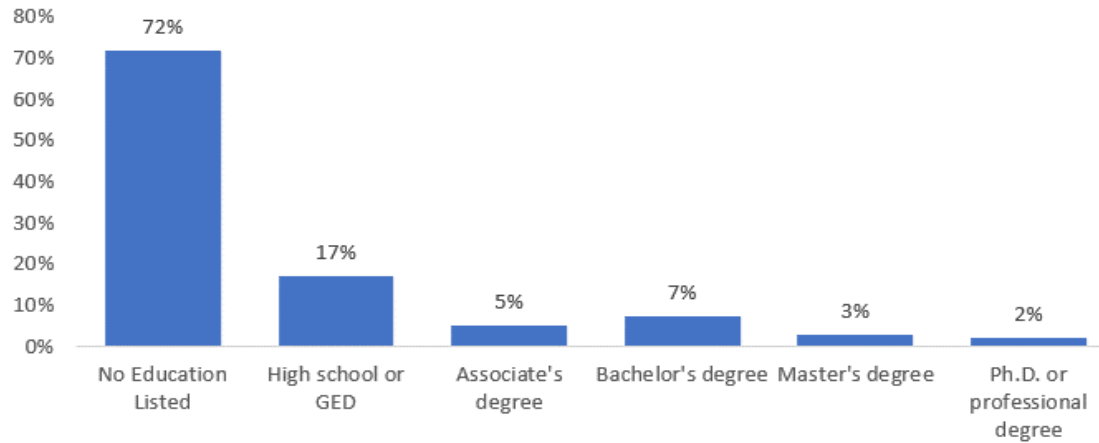


Source: Emsi

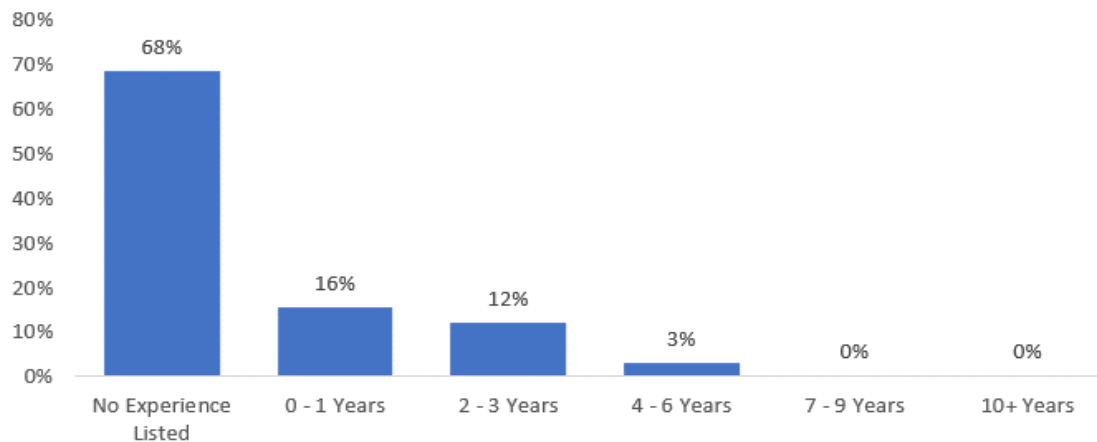
## EDUCATION AND SKILL REQUIREMENTS

Figures 20 and 21

Educational Requirements in LCLG Region Job Postings



Work Experience Requirements in LCLG Region Job Postings



Source: Emsi

◆ Where specified, a High school diploma/GED is the most common education credential specified by job postings, occurring in 17% of postings. Most job postings (16%) require 0-1 years of experience.



## IN-DEMAND HARD SKILLS

- ◆ Merchandising and Nursing appear most frequently as hard skills in postings for jobs in the LCLG Region. Other skills being requested most frequently in LCLG Region job postings include Cash Register, Flatbed Truck Operation, Basic Life Support, and Sell Techniques.

Table 30

**Top Hard Skills Listed in LCLG Region  
Job Postings, December 2019-  
December 2020**

Skill	Frequency in Postings
Merchandising	11%
Nursing	7%
Cash Register	5%
Flatbed Truck Operation	5%
Basic Life Support	5%
Selling Techniques	4%
Restaurant Operation	4%
Customer Satisfaction	4%
Warehousing	3%
Cash Handling	3%

Source: Emsi

## IN-DEMAND COMMON SKILLS

- ◆ The common skills most frequently sought by employers in the LCLG Region include Customer Service, Communications, Sales, and Management.

Table 31

**Top Common Skills Listed in  
LCLG Region Job Postings,  
December 2019-December 2020**

Skill	Frequency in Postings
Customer Service	21%
Communications	21%
Sales	16%
Management	15%
Valid Driver's License	10%
Leadership	9%
Operations	9%
Detail Oriented	7%
Presentations	5%
Teamwork	5%

Source: Emsi

## IN-DEMAND JOB QUALIFICATIONS

- ◆ A Commercial Driver’s License (CDL) is the most common qualification that appears in job postings.
- ◆ This appears in more than seven times the postings than Licensed Practical Nurse and Certified Nursing Assistant the next most common qualifications.

Table 32

**Top Qualifications Listed in LCLG Region Job Postings,  
December 2019-December 2020**

Qualification	Postings with Qualificat ion
Commercial Driver's License (CDL)	5,120
Licensed Practical Nurse	687
Certified Nursing Assistant	686
Nurse Practitioner	561
Transportation Worker Identification Credential (TW	513
Bachelor of Science in Nursing (BSN)	474
Hazmat Endorsement	386
Master of Science in Nursing (MSN)	181
CDL Class B License	160
Certified Pharmacy Technician	139

Source: Emsi



# HOUSING MARKET TRENDS

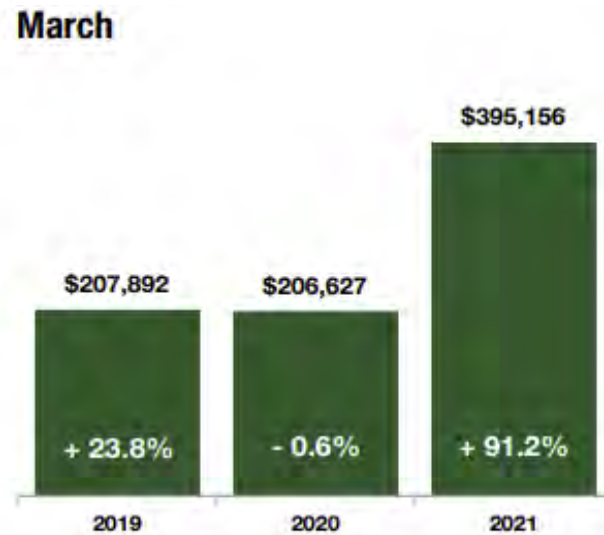


*Lake Placid, Essex County*

Housing is a critical component in communities that are vibrant and resilient. A mix of commercial, industrial, and residential land uses diversifies tax revenue and creates an environment where workers are not traveling outside of their community to work. Especially as the work-from-home movement sustains through COVID-19 recovery, people are thinking more about the spaces and environments they call home. The LCLG Region’s ability to support business development is tied greatly to where and how people can find homes in the region.

The Northern Adirondack Board of Realtors<sup>1</sup> (NABOR) reports that as of March 2021, sales were up over 53% since March 2020 and the median sales price in that time frame was up by 25%. Inventory, however, fell by over 56% (totaling 408 units), putting pressure on an already tight housing market. While inventory is already low in the area, the cost to build product continues to rise as lumber shortages impact the construction sector. The National Association of Home Builders Association<sup>2</sup> reports that due to the supply and demand of materials, the price to build a single-family home has risen nearly \$36,000 since 2020. This is reflected in recent data from the Adirondacks, where the average sales price rose 91% over 2020 and 2021, rising to \$395,156.

### Change in Average Sales Price in Northern ADKs



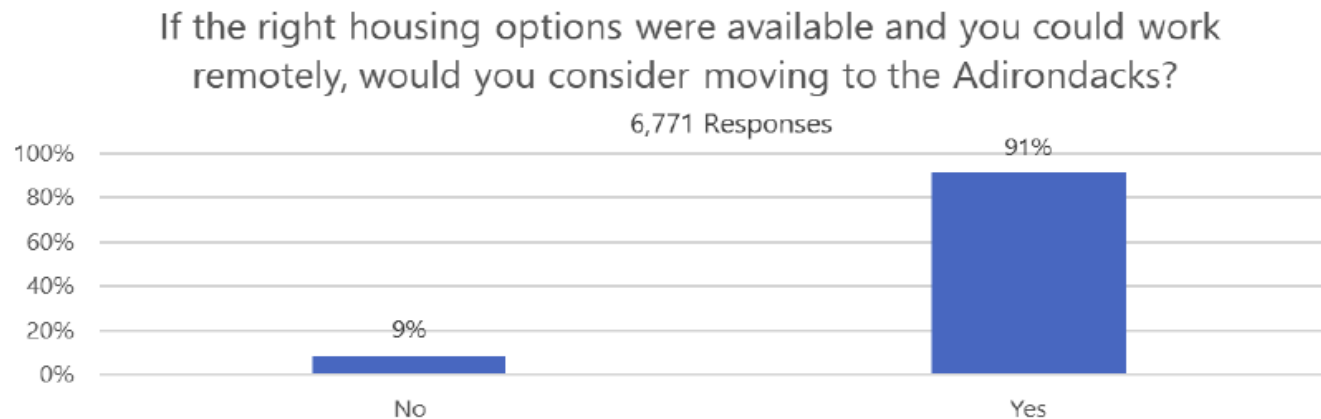
Source: Northern Adirondack Board of Realtors, March 2021 Market Report

<sup>1</sup> Covers Clinton, Essex, Franklin, Hamilton and Warren Counties

<sup>2</sup> Lumber Futures Extend Record Rally to Top \$1,500 for First Time, May 5, 2021, Bloomberg.com

Camoin 310 previously conducted a housing market study for the Lake Placid/North Elba community in Quarter 1 of 2021. The analysis took into account a regional perspective and offers insight into housing trends that are also experienced across the LCLG region. The following bullet points are relevant excerpts from the report.<sup>3</sup>

- ◆ Camoin 310, the Regional Office of Sustainable Tourism and EDC Warren County conducted a survey to assess people's desire to relocate to the Adirondacks as well as important factors that allow them to consider the community their home. The survey was distributed digitally via email and promoted on social media by the Regional Office of Sustainable Tourism, EDC Warren County, Adirondack Mountain Club, Adirondack North Country Association, Protect the Adirondacks, Adirondack Wild, Adirondack Common Ground Alliance, Adirondack Almanack, and the Adirondack Wild Center. A total of 6,773 responses were collected and analyzed as part of the Adirondack Relocation Assessment Survey from January 19, 2021 to January 29, 2021. Of those respondents, 5,593 completed the survey in its entirety.
- ◆ A total of 6,179 respondents (91%) indicated that they would consider moving to the Adirondacks if the right housing options were available and they could work remotely. Furthermore, several respondents note that their dream is to live in the Adirondacks and that proximity to a grocery store, restaurants, etc. is a big factor in deciding where to locate.



Source: *Housing Market Demand Study & Relocation Analysis, February 2021, Camoin Associates*

<sup>3</sup> *Housing Market Demand Study & Relocation Analysis, February 2021, Camoin 310*



- ◆ Seniors in the Adirondacks represent a substantial source of demand for multi-family units. Seniors in the regional market are looking for places to enjoy retirement or vacation. The majority of seniors currently live in single family homes and want to stay in the community, but do not have adequate housing to move into. This population is looking for single story living with less maintenance and a community feel and access to amenities.
- ◆ There is demand for rental units, but single-family demand is greater. Most of the regional demand is focused on owning single family homes. There is an opportunity for condominium development to capture some of that demand and potentially even renter households if a development's location outweighs housing preferences.
- ◆ The Adirondacks have a strong visitor base that has demand for housing in the Adirondacks. In our Adirondack Relocation Assessment survey, 91% of respondents expressed interest in moving to Adirondacks if the right housing options were available and they could work remotely, while 14% were very likely to move to the Adirondacks in the next five years.
- ◆ As part of this study, an Adirondack Relocation Assessment survey was conducted on Adirondack visitors to understand their likelihood of moving to the Adirondacks and the housing they would need. The survey found that the community that respondents are most interested in living in is the Lake Placid Region with 63% of indicating the area as their top choice.

# ATTACHMENT A: DATA SOURCES

## **ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)**

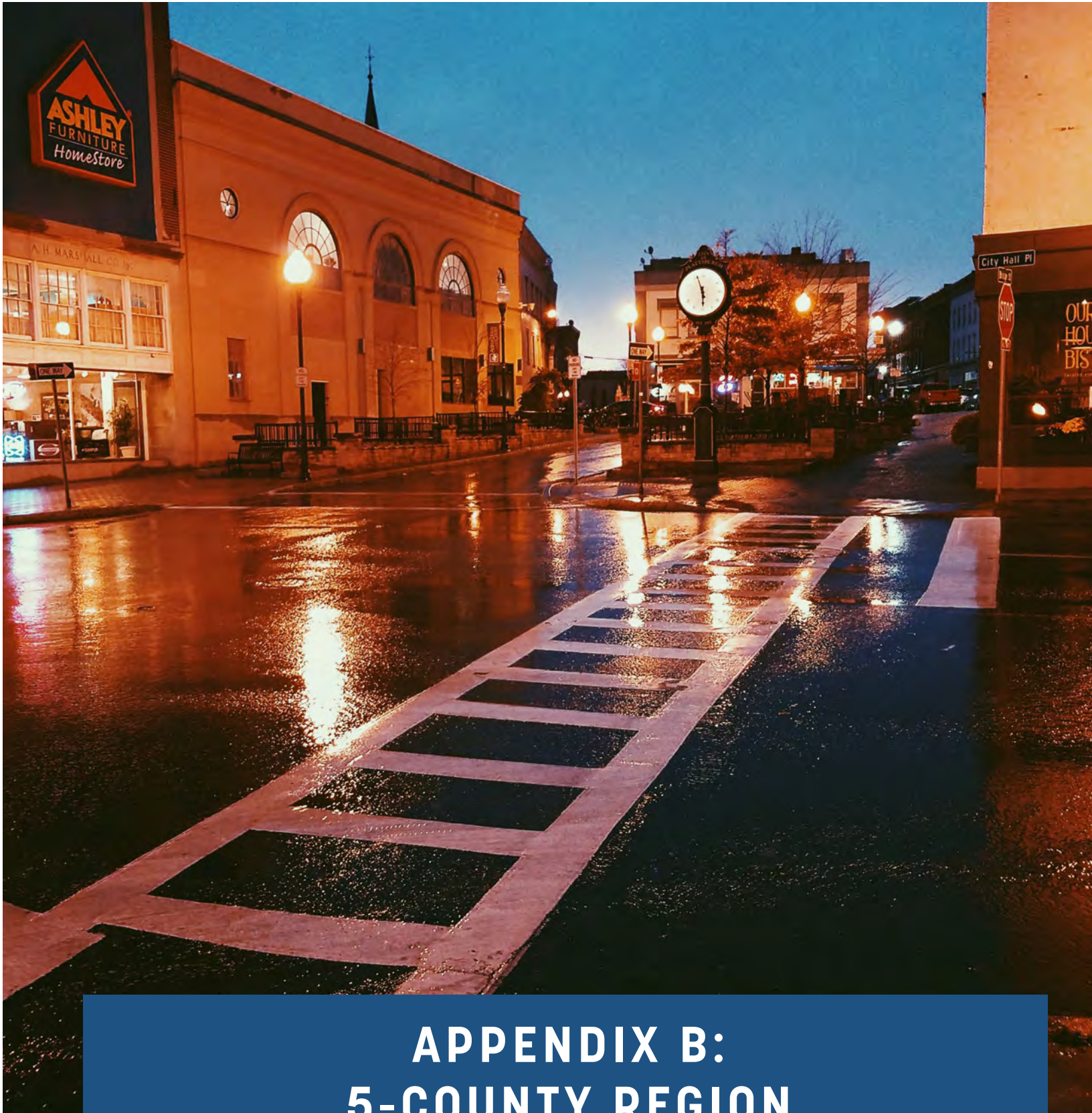
To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin 310 subscribes to Economic Modeling Specialists Intl. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. Emsi industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on Emsi, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

## **ESRI BUSINESS ANALYST ONLINE (BAO)**

Esri is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. Esri uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit [www.esri.com](http://www.esri.com).

## **CENSUS OF AGRICULTURE, U.S. DEPARTMENT OF AGRICULTURE (USDA)**

The Census of Agriculture provides a detailed picture of U.S. farms and ranches and the people who operate them. It provides uniform, comprehensive agricultural data for every state and county in the U.S. on topics including agricultural land, animal and crop production, employment, worker demographics, farm business operations, and the environment. and employment. It is conducted by the U.S. Department of Agriculture (USDA) every five years, in years ending in "2" and "7".



**APPENDIX B:  
5-COUNTY REGION  
ECONOMIC RESILIENCY ANALYSIS**



# DRAFT REPORT

## 5-COUNTY REGION ECONOMIC RESILIENCY ANALYSIS

Submitted to:

LAKE CHAMPLAIN LAKE GEORGE REGIONAL  
PLANNING BOARD

MAY 2021



# ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on Facebook and LinkedIn.

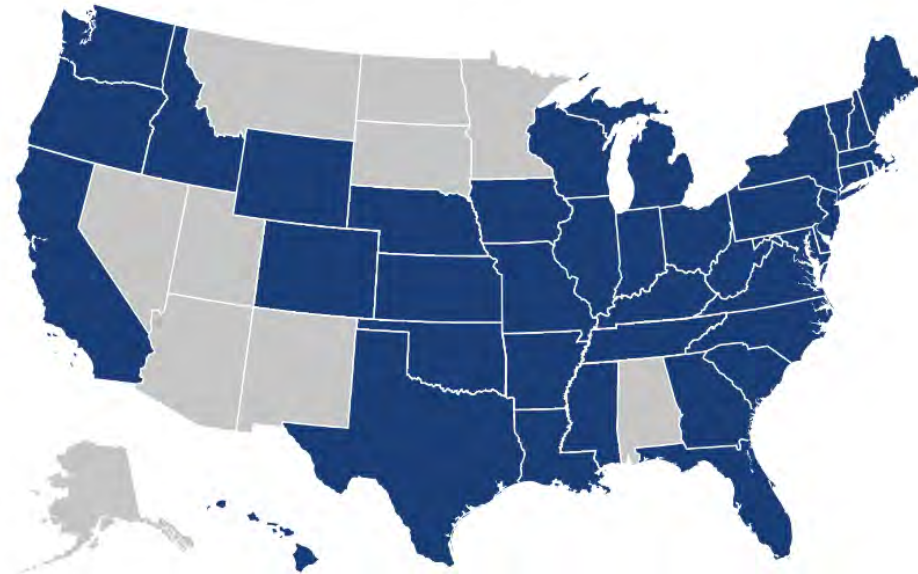
## THE PROJECT TEAM

Christa O. Franzl  
*Principal*

Alex Tranmer  
*Project Manager*

Tom Dworetzky  
*Lead Analyst*

Aaron Metheny  
*Analyst*



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# RESILIENCY AND ECONOMIC DISRUPTION

**Economic disruption has the potential to create economic opportunity.** But that can only be true when the right systems are in place to ensure a strong response that enables transformation in times of upheaval. Economic crisis, climate change, social unrest, and natural and manmade disasters will continue to impact regional economies, but doing the work to understand, prepare, and address these situations will increase the ability to respond quickly and strategically and minimize major disruptions. Developing the tools and partnerships that enable resiliency through this process will support communities in the LCLG region and produce an economy that can withstand and bounce forward from disruption. Resiliency is not simply the act of responding to a crisis, but the ability to anticipate, withstand, and bounce back from an unanticipated event.<sup>1</sup>

The U.S. Commerce Department’s Economic Development Administration, along with the International Economic Development Council and The National Governor’s Association, have developed programs to help guide the economic development profession and communities. These programs helped define the research in this report.

## DEFINING KEY INDUSTRIES

Before analyzing regional indicators, a set of criteria was established to determine the industries that have the greatest economic impact in the five-county region. The industries that are profiled below reflect the subsectors that meet at least one of the following

thresholds. Throughout the report, these are known as “key industries.”

- Have 1,000 or more jobs based on 2020 employment
- Gained 100+ jobs in last five years
- Have a location quotient greater than 2.00
- Grew by more than 10 establishments in last five years
- Fall in the top 20 contributors to 2020 Gross Regional Product

## ECONOMIC DISRUPTION INDICATORS

Disruption in the economy can lead to both positive and negative impacts, where the region could grow a particular market due to disruption or be subjected to severe economic implications. The following indicators were chosen to reflect changes that could subject the regional economy to disruption. More information on each indicator’s application to the region and the labor market can be found within each section. Indicators include:

- Upstream Supply Chain Trade Exposure
- Key Industries Workforce 55+
- Industry Diversity
- Occupations in key industries with greatest risk for automation

The summary table below shows which key industries are at the top of each indicator (Note that only indicators as they relate to industries/NAICS are included in this table, not occupations/SOCs).

<sup>1</sup> National Association of Development Organizations, *CEDS Central*, May 3, 2021.

**LCLG Region: Key Industries Disruptibility Indicator Summary, 4-Digit NAICS**

NAICS	Description	2020 Jobs	LCLG Region Age 55+	Total Diversity	Supply Chain Exposure
1120	Animal Production	1,148	419	181	
1133	Logging	229	96	<10	
2123	Nonmetallic Mineral Mining and Quarrying	343	88	22	
2211	Electric Power Generation, Transmission and Distribution	352	92	18	
2361	Residential Building Construction	1,094	286	166	
2382	Building Equipment Contractors	1,417	325	97	
3211	Sawmills and Wood Preservation	208	51	<10	28.4%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	185	26	<10	15.6%
3221	Pulp, Paper, and Paperboard Mills	1,705	495	74	26.5%
3261	Plastics Product Manufacturing	956	216	96	36.7%
3271	Clay Product and Refractory Manufacturing	244	82	56	13.6%
3279	Other Nonmetallic Mineral Product Manufacturing	195	65	<10	
3365	Railroad Rolling Stock Manufacturing	199	41	18	20.1%
3366	Ship and Boat Building	210	46	56	21.6%
3391	Medical Equipment and Supplies Manufacturing	1,634	480	118	31.2%
4411	Automobile Dealers	1,341	366	53	
4412	Other Motor Vehicle Dealers	244	69	<10	
4441	Building Material and Supplies Dealers	1,628	520	85	
4442	Lawn and Garden Equipment and Supplies Stores	297	104	14	10.9%
4451	Grocery Stores	2,246	504	202	
4471	Gasoline Stations	1,378	242	127	
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,614	358	215	16.4%
5617	Services to Buildings and Dwellings	1,537	388	337	
6211	Offices of Physicians	2,086	619	93	
6221	General Medical and Surgical Hospitals	4,408	1,186	238	
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1,815	467	143	
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	1,196	261	71	
7121	Museums, Historical Sites, and Similar Institutions	275	85	<10	
7131	Amusement Parks and Arcades	478	36	65	
7139	Other Amusement and Recreation Industries	1,304	322	81	
7211	Traveler Accommodation	3,425	598	458	
7212	RV (Recreational Vehicle) Parks and Recreational Camps	619	144	49	
7225	Restaurants and Other Eating Places	7,070	730	851	
<b>Total</b>		<b>43,080</b>	<b>9,825</b>	<b>4,012</b>	

Source: Emsi



## UPSTREAM SUPPLY CHAIN TRADE EXPOSURE

Imports as a percent of domestic demand for upstream products is a measure of international trade exposure for a particular sector. For instance, a value of 26.5% for domestic Paper Mills (NAICS 322121) indicates that over a quarter of domestic demand for goods produced by industries that sell to paper mills is fulfilled by international imports, which is considered a high exposure level. 33.6% and above is considered "very high", above 26.1% is "high", above 18.7% is "medium", and 18.7% and below is "low."

In the instance of COVID-19, individual countries had, and continue to have varying levels of outbreak, leading to different policies and restrictions around what categories of businesses can and cannot operate. Even while the public health environment stabilizes in the U.S., lingering outbreaks across the globe will continue to have impacts on companies who manufacture in the U.S. and rely on imports in their supply chains. Outside of COVID-19, there are many other reasons that a company's international supply chain could be disrupted, including but not limited to social or political unrest, environmental disaster, or fluctuating tariffs between countries.

Key industries in the LCLG region with the most upstream supply chain international trade exposure are:

- **Manufacturing** including plastics, medical instrument and supplies, and transport manufacturing - Medical Instrument & Supply Manufacturing's supply chain exposure is considered high. This industry accounts for just over 1,500 jobs in the region and 2.2% of the LCLG Region's Gross Regional Product (GRP).
- **Paper mill-related sectors** – Paper mills account for just over 1,700 jobs in the region and contributes to 4.1% of the region's Gross Regional Product.

Looking at the proportion of an industry's supply chain that are imports reveals just a piece of how critical cross-border activity is to the LCLG Region. As of May 2021, the U.S.-Canadian border remains closed to leisure travel. And while this ensures that freight can cross the border, the border closing continues to have implications for company executives who would typically travel freely between the U.S. and Canada to meet stakeholders, visit a new site, or check-in on manufacturing operations.

**Imports as Share of Domestic Demand for Upstream Supply Chain**

NAICS	Description	Imports/ Domestic Demand (%)	2020 Jobs in LCLG Region	% of Total Regional Jobs	2020 GRP	% of Total GRP
326160	Plastic Bottle Manufacturing in the US	36.7%	43	<0.1%	\$6,895,874	0.1%
339920	Athletic & Sporting Goods Manufacturing in the US	31.4%	<10	<0.1%	\$129,480	<0.1%
339112	Medical Instrument & Supply Manufacturing in the US	31.2%	1,539	1.4%	\$251,117,798	2.2%
321113	Sawmills & Wood Production in the US	28.4%	199	0.2%	\$17,797,688	0.2%
326140	Polystyrene Foam Manufacturing in the US	27.0%	32	<0.1%	\$3,710,816	<0.1%
322121	Paper Mills in the US	26.5%	1,705	1.5%	\$461,979,159	4.1%
336611	Ship Building in the US	21.6%	87	0.1%	\$11,923,503	0.1%
336510	Train, Subway & Transit Car Manufacturing in the US	20.1%	199	0.2%	\$28,729,667	0.3%
326121	Plastic Pipe & Parts Manufacturing in the US	18.4%	25	<0.1%	\$2,793,781	<0.1%
336612	Boat Building in the US	18.2%	123	0.1%	\$12,586,616	0.1%
326150	Urethane Foam Manufacturing in the US	18.0%	<10	<0.1%	\$1,292,636	<0.1%
454390	Direct Selling Companies in the US	16.4%	80	0.1%	\$24,624,792	0.2%
339950	Billboard & Sign Manufacturing in the US	15.7%	43	<0.1%	\$2,655,348	<0.1%
321211	Wood Paneling Manufacturing in the US	15.6%	105	0.1%	\$7,033,954	0.1%
339910	Jewelry Manufacturing in the US	14.1%	28	<0.1%	\$2,564,414	<0.1%
327910	Abrasive & Sandpaper Manufacturing in the US	13.6%	31	<0.1%	\$13,073,694	0.1%
444210	Lawn & Outdoor Equipment Stores in the US	10.9%	108	0.1%	\$12,526,038	0.1%
327991	Mineral Product Manufacturing in the US	10.0%	164	0.1%	\$11,844,830	0.1%

Source: IBISWorld US Trade Exposure Tool

\*33.6% and above is considered "very high", above 26.1% is "high", above 18.7% is "medium", and 18.7% and below is "low."

## KEY INDUSTRIES BY WORKERS AGE 55 AND OVER

COVID-19 poses a particularly high risk for individuals over 55-years-old, which led to workers making decisions to either leave or limit their participation in the workforce during the worst of the pandemic. While these may have been temporary decisions at the time, the personal choices of workers will have lasting impacts on the nation's labor force participation rate even as fears specific to COVID-19 wane. Oxford Economics reported in February 2021 that younger workers had returned to the workforce to nearly match pre-pandemic levels, however older workers did not show the same propensity to enter back into the labor market.<sup>2</sup> The pandemic accelerated people's decision to take early retirement, leaving lasting impacts on labor force participation. Even as the economy opens back up, ushering in positive economic indicators like a dropping unemployment rate and the positive news about Gross Domestic Product growing at a rate of 6.4% in Quarter 1 2021<sup>3</sup>, the labor force participation rate has "only regained just over a third of its drop [since the pandemic], with 4.3 million more people out of the workforce than in February of last year." For older workers that do make the decisions to get back into the labor force, it may not be as simple as searching for their former position. <sup>4</sup> They may face age discrimination getting back into the labor market, face different competition due to technology changes or find their position eliminated.

**MORE THAN 2 MILLION WORKERS HAVE LEFT THE LABOR FORCE TO RETIRE SINCE THE START OF THE PANDEMIC. THIS IS MORE THAN DOUBLE THE NUMBER OF PEOPLE WHO DROPPED OUT OF THE LABOR FORCE TO RETIRE IN 2019.**

Oxford Economics, February 2021.

The ten industries in the LCLG Region with the greatest number of workers that are over 55 are shown listed below. The number in parentheses represents what proportion these workers account for in the total industry. For all key industries in the region, the average percent of workers over 55 is 23.8%. Higher than average proportions, which are bolded, are seen in the medical field, manufacturing and building.

- 1) General Medical and Surgical Hospitals **(26.7%)**
- 2) Restaurants (11.5%)
- 3) Offices of Physicians and **(30.3%)**
- 4) Traveler Accommodation (20.4%)
- 5) Building Materials and Supplies Dealers **(31.2%)**
- 6) Grocery Stores (22.6%)
- 7) Pulp, Paper and Paperboard Mills **(29.0%)**
- 8) Medical Equipment and Manufacturing **(29.0%)**
- 9) Nursing Care Facilities **(25.6%)**
- 10) Animal Production **(35.3%)**

Workers over the age of 55 in the industries above account for 5% of the total employment in all jobs in the region.

<sup>2</sup> Oxford Economics, February 2021. Research Briefing | US, Lasting Covid imprint on labor force participation

<sup>3</sup> Bureau of Economic Analysis, Released April 29, 2021. Gross Domestic Product, First Quarter 2021 (Advanced Estimate)

<sup>4</sup> <https://www.nytimes.com/2021/03/15/business/economy/labor-force-dropouts.html>



**LCLG Region: Key Industries by Age 55+, 4-Digit NAICS**

NAICS	Description	2020 Jobs	LCLG Region Age 55+	LCLG Age 55+ % of Industry	US Age 55+ % of Industry	% Difference LCLG and US
6221	General Medical and Surgical Hospitals	4,447	1,186	26.7%	24.1%	2.6%
7225	Restaurants and Other Eating Places	6,359	730	11.5%	12.0%	-0.5%
6211	Offices of Physicians	2,043	619	30.3%	24.5%	5.8%
7211	Traveler Accommodation	2,938	598	20.4%	24.1%	-3.7%
4441	Building Material and Supplies Dealers	1,664	520	31.2%	30.1%	1.1%
4451	Grocery Stores	2,226	504	22.6%	22.7%	0.0%
3221	Pulp, Paper, and Paperboard Mills	1,707	495	29.0%	31.9%	-2.9%
3391	Medical Equipment and Supplies Manufacturing	1,654	480	29.0%	27.8%	1.3%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1,822	467	25.6%	25.3%	0.3%
1120	Animal Production	1,186	419	35.3%	33.0%	2.3%
5617	Services to Buildings and Dwellings	1,510	388	25.7%	26.1%	-0.4%
4411	Automobile Dealers	1,283	366	28.5%	25.2%	3.4%
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,641	358	21.8%	22.6%	-0.8%
2382	Building Equipment Contractors	1,340	325	24.3%	21.1%	3.1%
7139	Other Amusement and Recreation Industries	1,195	322	26.9%	19.0%	8.0%
2361	Residential Building Construction	1,056	286	27.1%	27.1%	0.0%
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	1,162	261	22.4%	23.3%	-0.9%
4471	Gasoline Stations	1,350	242	17.9%	19.5%	-1.6%
3261	Plastics Product Manufacturing	922	216	23.4%	26.3%	-2.9%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	597	144	24.2%	32.5%	-8.3%
4442	Lawn and Garden Equipment and Supplies Stores	290	104	35.7%	31.7%	4.1%
1133	Logging	237	96	40.7%	34.2%	6.5%
2211	Electric Power Generation, Transmission and Distribution	343	92	27.0%	27.8%	-0.8%
2123	Nonmetallic Mineral Mining and Quarrying	340	88	25.8%	30.0%	-4.1%
7121	Museums, Historical Sites, and Similar Institutions	245	85	34.7%	26.4%	8.3%
3271	Clay Product and Refractory Manufacturing	242	82	33.8%	32.1%	1.7%
4412	Other Motor Vehicle Dealers	229	69	30.0%	26.5%	3.5%
3279	Other Nonmetallic Mineral Product Manufacturing	171	65	37.9%	25.3%	12.6%
3211	Sawmills and Wood Preservation	197	51	25.9%	27.7%	-1.8%
3366	Ship and Boat Building	202	46	22.7%	26.5%	-3.8%
3365	Railroad Rolling Stock Manufacturing	184	41	22.3%	25.6%	-3.3%
7131	Amusement Parks and Arcades	372	36	9.5%	15.9%	-6.3%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	162	26	16.2%	24.5%	-8.2%
<b>Total</b>		<b>41,315</b>	<b>9,825</b>	<b>23.8%</b>	<b>21.4%</b>	<b>2.4%</b>

Source: Emsi

## KEY INDUSTRIES BY DIVERSITY OF LABOR FORCE

For several compounding reasons, including education and wealth gaps, substandard housing, concentration in high-risk occupations, and healthcare access, COVID-19 has unequally affected racial and ethnic minority groups. People of color are at a higher risk of contracting COVID-19, and they are more likely to cite acute economic challenges because of the pandemic.<sup>5 6</sup>

This trend is not unique to the COVID-19 pandemic. It is well documented that disasters and the subsequent economic disruptions that follow exacerbate pre-existing vulnerabilities and inequities within minority populations.<sup>7</sup>

**DIVERSE EMPLOYEES MAKE UP A SIGNIFICANT PORTION OF THE LCLG LABOR FORCE, HOLDING NEARLY 9,000 JOBS OR 15% OF THE TOTAL EMPLOYMENT IN ALL JOBS.**

Industry sectors in the LCLG Region with the greatest diversity by number of minority-held jobs are generally service sectors, healthcare, agriculture, and construction.<sup>8</sup>

The ten industries in the LCLG Region with the greatest number of diverse jobs are listed below. The number in parentheses represents what proportion diverse jobs account for in the total industry.

- 1) Restaurants and Other Eating Places (12%)
- 2) Traveler Accommodation (13%)
- 3) Services to Buildings and Dwellings (22%)
- 4) General Medial and Surgical Hospitals (5%)
- 5) General Merchandise Stores (13%)
- 6) Grocery Stores (9%)
- 7) Animal Production (16%)
- 8) Residential Building Construction (14%)
- 9) Nursing Care Facilities (8%)
- 10) Gasoline Stations (9%)

Businesses need support from the economic development community to create expanded and innovative HR policies with targeted resources to help diverse employees cope with the wide range of challenges created by the pandemic. This helps to address the current crisis and build more diverse and inclusive workplaces into the future.

<sup>5</sup> *Health Equity Considerations and Racial and Ethnic Minority Groups*, Center for Disease Control and Prevention (CDC), (2021). <https://www.cdc.gov/coronavirus/2019-ncov/community/health-equity/race-ethnicity.html>

<sup>6</sup> *Diverse employees are struggling the most during COVID-19—here's how companies can respond*, McKinsey & Company, (2020) <https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diverse-employees-are-struggling-the-most-during-covid-19-heres-how-companies-can-respond>,

<sup>7</sup> Davidson, T.M., Price, M., McCauley, J.L. and Ruggiero, K.J. (2013), *Disaster Impact Across Cultural Groups: Comparison of Whites, African Americans, and Latinos*. *American Journal of Community Psychology*, 52: 97-105. <https://doi.org/10.1007/s10464-013-9579-1>

<sup>8</sup> Total Diversity includes Hispanic or Latino, Black or African American, American Indian or Alaska Native, Asians, Native Hawaiians or Other Pacific Islander, and Two or more races.

**LCLG Region Key Industries by Diversity**

NAICS	Description	2020 Jobs	Total Diversity	Total Diversity % of Industry	Hispanic or Latino % of Industry	Black or African American % of Industry	American Indian or Alaska Native % of Industry	Asian % of Industry	Native Hawaiian or Other Pacific Islander % of Industry	Two or More Races % of Industry	White % of Industry
7225	Restaurants and Other Eating Places	7,070	851	12%	4%	3%	0%	3%	Insf. Data	2%	88%
7211	Traveler Accommodation	3,425	458	13%	4%	4%	Insf. Data	3%	Insf. Data	2%	87%
5617	Services to Buildings and Dwellings	1,537	337	22%	15%	4%	Insf. Data	1%	0%	1%	78%
6221	General Medical and Surgical Hospitals	4,408	238	5%	2%	1%	Insf. Data	1%	0%	1%	95%
4523	General Merchandise Stores, including Warehouse Clubs ar	1,614	215	13%	5%	5%	Insf. Data	2%	Insf. Data	2%	87%
4451	Grocery Stores	2,246	202	9%	3%	3%	Insf. Data	1%	Insf. Data	2%	91%
1120	Animal Production	1,148	181	16%	8%	4%	Insf. Data	2%	0%	Insf. Data	84%
2361	Residential Building Construction	1,094	166	15%	9%	3%	Insf. Data	2%	Insf. Data	1%	85%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1,815	143	8%	2%	4%	Insf. Data	Insf. Data	Insf. Data	1%	92%
4471	Gasoline Stations	1,378	127	9%	3%	2%	Insf. Data	2%	0%	1%	91%
3391	Medical Equipment and Supplies Manufacturing	1,634	118	7%	2%	2%	Insf. Data	2%	Insf. Data	Insf. Data	93%
2382	Building Equipment Contractors	1,417	97	7%	4%	2%	Insf. Data	Insf. Data	0%	Insf. Data	93%
3261	Plastics Product Manufacturing	956	96	10%	3%	3%	1%	2%	Insf. Data	1%	90%
6211	Offices of Physicians	2,086	93	4%	1%	1%	0%	2%	0%	1%	96%
4441	Building Material and Supplies Dealers	1,628	85	5%	2%	2%	Insf. Data	Insf. Data	0%	1%	95%
7139	Other Amusement and Recreation Industries	1,304	81	6%	4%	1%	Insf. Data	Insf. Data	0%	Insf. Data	94%
3221	Pulp, Paper, and Paperboard Mills	1,705	74	4%	2%	1%	Insf. Data	1%	0%	Insf. Data	96%
6232	Residential Intellectual and Developmental Disability, Menta	1,196	71	6%	2%	2%	0%	Insf. Data	Insf. Data	1%	94%
7131	Amusement Parks and Arcades	478	65	14%	6%	4%	Insf. Data	Insf. Data	0%	2%	86%
3271	Clay Product and Refractory Manufacturing	244	56	23%	7%	14%	0%	Insf. Data	0%	Insf. Data	77%
3366	Ship and Boat Building	210	56	27%	13%	9%	0%	Insf. Data	0%	Insf. Data	73%
4411	Automobile Dealers	1,341	53	4%	1%	Insf. Data	Insf. Data	1%	0%	1%	96%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	619	49	8%	4%	2%	0%	Insf. Data	0%	Insf. Data	92%
2123	Nonmetallic Mineral Mining and Quarrying	343	22	6%	4%	Insf. Data	0%	Insf. Data	0%	Insf. Data	94%
3365	Railroad Rolling Stock Manufacturing	199	18	9%	Insf. Data	Insf. Data	Insf. Data	Insf. Data	0%	Insf. Data	91%
2211	Electric Power Generation, Transmission and Distribution	352	18	5%	Insf. Data	Insf. Data	0%	Insf. Data	0%	Insf. Data	95%
4442	Lawn and Garden Equipment and Supplies Stores	297	14	5%	Insf. Data	Insf. Data	0%	Insf. Data	0%	Insf. Data	95%
1133	Logging	229	<10	Insf. Data	Insf. Data	Insf. Data	0%	0%	0%	0%	99%
3211	Sawmills and Wood Preservation	208	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	0%	0%	Insf. Data	96%
3212	Veneer, Plywood, and Engineered Wood Product Manufact	185	<10	Insf. Data	Insf. Data	Insf. Data	0%	0%	0%	Insf. Data	98%
3279	Other Nonmetallic Mineral Product Manufacturing	195	<10	Insf. Data	Insf. Data	Insf. Data	0%	0%	0%	0%	98%
4412	Other Motor Vehicle Dealers	244	<10	Insf. Data	Insf. Data	0%	0%	0%	0%	0%	99%
7121	Museums, Historical Sites, and Similar Institutions	275	<10	Insf. Data	Insf. Data	Insf. Data	0%	Insf. Data	0%	0%	97%
<b>Total</b>		<b>43,080</b>	<b>4,012</b>	<b>9%</b>	<b>4%</b>	<b>3%</b>	<b>0%</b>	<b>2%</b>	<b>0%</b>	<b>1%</b>	<b>91%</b>

Source: Emsi

## TOP OCCUPATIONS IN KEY INDUSTRIES: AUTOMATION RISK

There are multiple perspectives on the matter of automation and technology uptake across industries. From an employee's perspective, their work may be reduced due to technology, or their role could require additional training to work in tandem with technology. This has the potential to displace workers who do not want to or who are not able to acquire these new skills. Even if an employee desires additional training to excel in their position, the ability to seek or find training and education to upskill is not evenly equitable, further exacerbating the wealth-gap.

While technology has the potential to displace workers, technology and digital tools can be greatly beneficial to today's employers, especially in today's labor market where labor is scarce. Automation of processes can help a business run more efficiently and maintain operations with a smaller staff. With shifting labor force trends and difficulty attracting people back to the workplace for varied reasons, companies could make further investment in technology to secure their ability to produce their service or product with less reliance on the whims of the labor market.

The industries that show high risk, highlighted in blue in the table below, account for 26,498 jobs, or nearly a quarter, of all jobs in the region. Of the top occupations within the LCLG region's key industries, the following show the greatest risk for automation.

- Food and beverage serving workers,
- Grounds maintenance workers,
- Other food preparation/serving workers, and
- Construction trades workers

Identifying which occupations show the greatest risk for automation can help economic development service providers prepare for the workers from these fields seeking other employment and develop a plan that capitalizes on the skills and assets these individuals could bring to other positions. Alternatively, among economic development, workforce, and educational institutions, trainings or certificates that support workers who do want to take on technology can benefit employees and employers.



**LCLG Region Top Occupations in Key Industries by Automation Index, 3-Digit SOC**

SOC	Description	Automation Index	2020 Jobs	% of Total Occupations	Median Annual Earnings
35-3000	Food and Beverage Serving Workers	129.2	5,422	5%	\$26,614
37-3000	Grounds Maintenance Workers	128.6	1,131	1%	\$31,061
35-9000	Other Food Preparation and Serving Related Workers	128.5	1,127	1%	\$25,708
47-2000	Construction Trades Workers	125.9	4,139	4%	\$45,115
35-2000	Cooks and Food Preparation Workers	125.5	2,367	2%	\$29,078
37-2000	Building Cleaning and Pest Control Workers	123.0	3,017	3%	\$27,674
51-4000	Metal Workers and Plastic Workers	118.2	1,201	1%	\$38,689
53-7000	Material Moving Workers	116.9	3,810	3%	\$28,932
51-9000	Other Production Occupations	115.6	2,676	2%	\$38,955
51-2000	Assemblers and Fabricators	113.6	1,608	1%	\$28,761
49-9000	Other Installation, Maintenance, and Repair Occupations	111.3	2,867	3%	\$41,966
45-2000	Agricultural Workers	110.8	1,015	1%	\$31,698
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	109.6	1,638	1%	\$38,918
53-3000	Motor Vehicle Operators	106.4	2,677	2%	\$36,623
35-1000	Supervisors of Food Preparation and Serving Workers	105.3	679	1%	\$42,446
43-3000	Financial Clerks	102.0	2,174	2%	\$36,342
43-9000	Other Office and Administrative Support Workers	101.1	2,481	2%	\$32,412
41-2000	Retail Sales Workers	98.7	7,005	6%	\$25,470
31-9000	Other Healthcare Support Occupations	96.4	732	1%	\$35,231
43-4000	Information and Record Clerks	96.2	3,558	3%	\$32,590
31-1100	Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	94.7	5,571	5%	\$28,103
29-2000	Health Technologists and Technicians	92.3	2,591	2%	\$41,545
43-6000	Secretaries and Administrative Assistants	92.1	2,179	2%	\$38,956
43-1000	Supervisors of Office and Administrative Support Workers	91.8	937	1%	\$55,150
13-1000	Business Operations Specialists	88.3	2,285	2%	\$56,918
39-9000	Other Personal Care and Service Workers	88.1	1,662	1%	\$27,415
11-9000	Other Management Occupations	87.1	2,703	2%	\$71,721
29-1000	Healthcare Diagnosing or Treating Practitioners	86.3	4,327	4%	\$77,691
41-1000	Supervisors of Sales Workers	85.9	1,302	1%	\$41,764
11-1000	Top Executives	82.2	1,934	2%	\$91,520
<b>Total</b>			<b>76,815</b>		

# ATTACHMENT A: DATA SOURCES

## **ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)**

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

## **ESRI BUSINESS ANALYST ONLINE (BAO)**

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit [www.esri.com](http://www.esri.com).

## **IBISWORLD + US TRADE EXPOSURE TOOL**

IBISWorld provides trusted industry research on thousands of industries worldwide. Their in-house analysts leverage economic, demographic and market data, then add analytical and forward-looking insight, to help organizations of all types make better business decisions. The US Trade Exposure Tool, in the form of an Excel workbook, uses IBISWorld's international trade metrics, supply chain mappings, and the latest monthly United States International Trade Commission trade data.

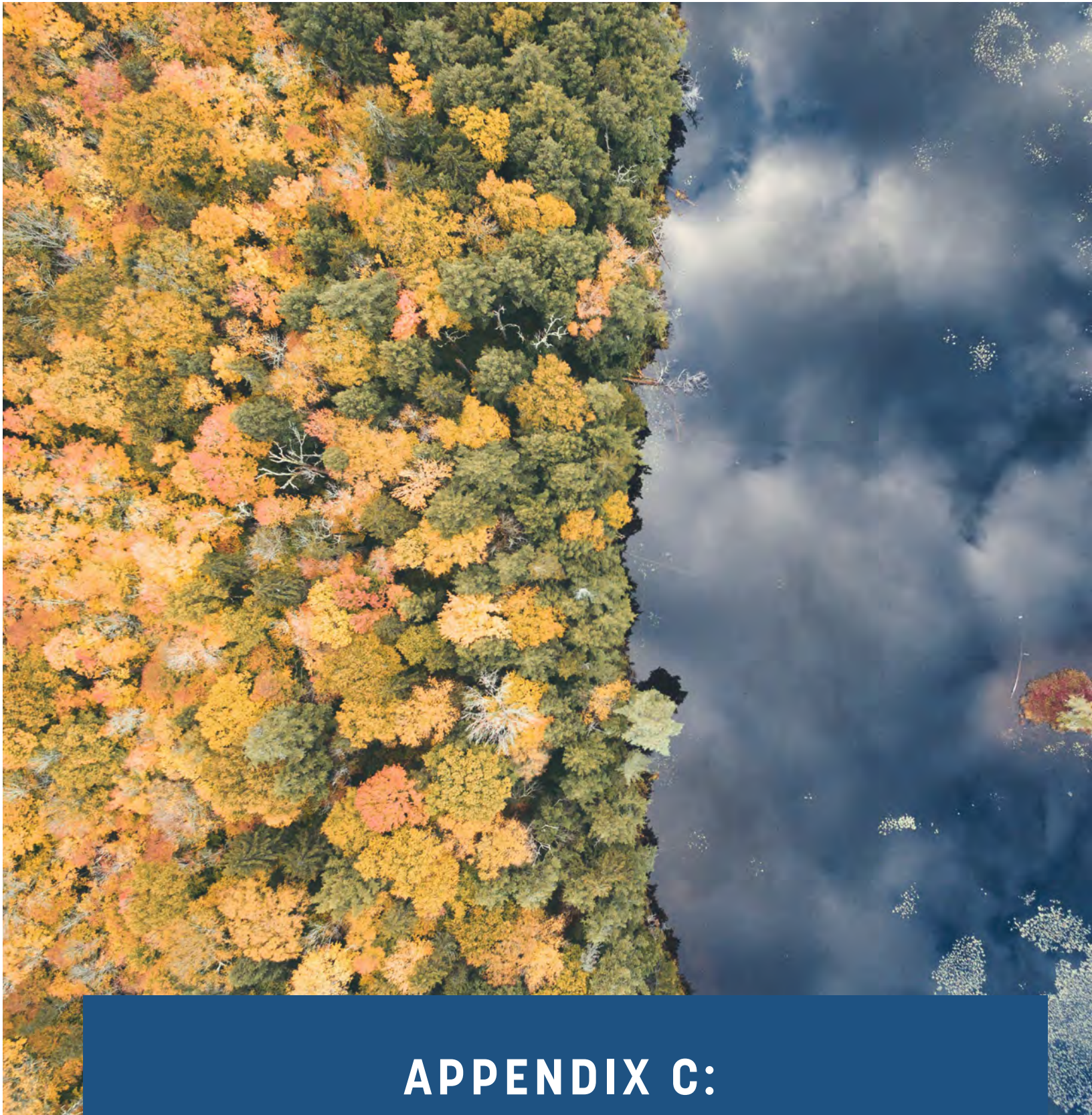


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# APPENDIX C: HOUSING GAP ANALYSIS



# FORWARD *together* } Housing Gap Analysis

Housing is a critical component in communities that are vibrant and resilient. Without available, quality, and affordable housing, businesses in the LCLG region are limited in their ability to recruit and retain workers, limiting their growth potential. To begin to identify needs for the region, the LCLGRP commissioned this preliminary housing gap analysis that examines the region’s housing diversity and the affordability of owner and renter-occupied housing at a County level. The findings are summarized below, with an explanation of the analysis methodology and data sources provided at the end of the report.

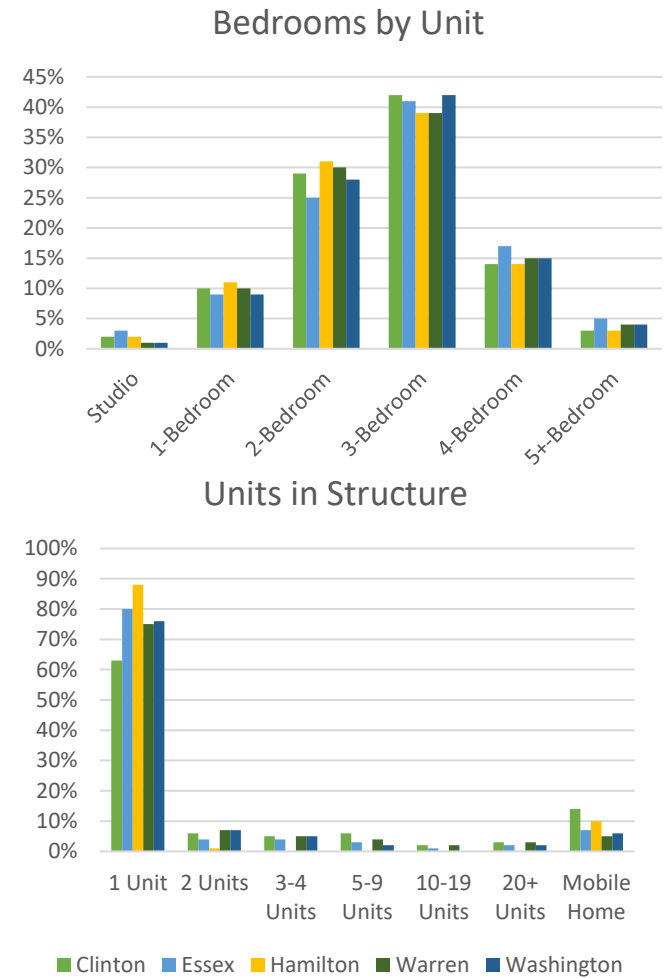
## Regional Housing Diversity

Housing units in the five counties are similar in terms of number of bedrooms, with approximately 40% units having three bedrooms, 30% having two bedrooms, 15% having four bedrooms, and 10% having one bedroom. In comparison, there is a greater diversity of household sizes across the region, from a low of 2.07 in Hamilton County to a high of 2.49 in Washington County.

Over 80% of housing in the LCLG region is single-family, with single-family detached units the most prevalent, followed by mobile homes. Clinton County has the greatest diversity of housing types, with one-quarter of housing structures having two or more units. Hamilton County has the least diversity of housing types, with just 1% of structures having two or more units.

## Housing Gap Analysis Key Findings

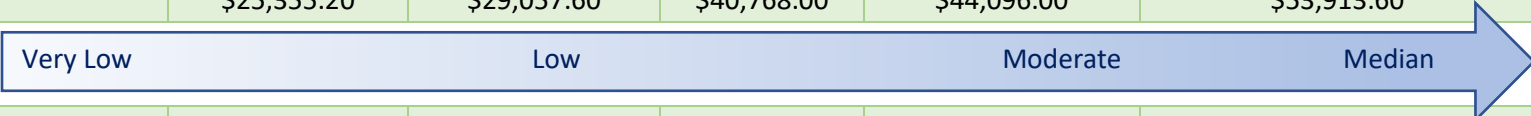
The housing gap analysis focuses on the ability of typical employees in the top five sectors of each County to afford a home or rental unit in the County. The top five industries’ median incomes range from very low/low (between 30 & 50% of the County median income) to the median. In all 5 counties, the median home is out of reach for a typical employee in at least one of the top employment sectors. In Warren County, a typical employee in all five top sectors is not able to afford to purchase a home at the County median value. In terms of rentals, a typical employee is limited in the size of their rental (i.e., number of bedrooms), with typical employees in some of the region’s top sectors unable to afford even a studio apartment.



# FORWARD *together* Housing Gap Analysis

## Clinton County Homeownership Gap Analysis


- The median home value in Clinton County is \$145,693. To afford a home at this price, a Clinton County household needs to make 60% of the median income for the county, or \$35,771.
- A typical accommodation/food services and retail trade employee (representing 22% of the County’s employees, or 8,085 people) cannot afford to purchase a home at this cost.

Employment Sector	Accommodation and Food Services	Retail Trade	Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
					
<b>% of County's Median Household Income</b>	43%	49%	69%	74%	91%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$ 4,492.80
<b>Affordable Monthly Household Cost (@ 30% for PITI)</b>	\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Affordable Monthly Mortgage Payment</b>	\$443.72	\$508.51	\$713.44	\$771.68	\$943.49
<b>Affordable 30-Year Mortgage @ 4% interest</b>	\$93,000.79	\$106,615.77	\$149,345.86	\$161,704.08	\$197,521.95
<b>Affordable Home Price</b>	\$103,334.21	\$118,461.97	\$165,939.84	\$179,671.20	\$219,468.83
<b>Median Home Value</b>	\$145,693.00				
<b>Price-Difference from Median</b>	(\$42,358.79)	(\$27,231.03)	\$20,246.84	\$33,978.20	\$73,775.83

# FORWARD *together* Housing Gap Analysis

## Clinton County Rental Gap Analysis

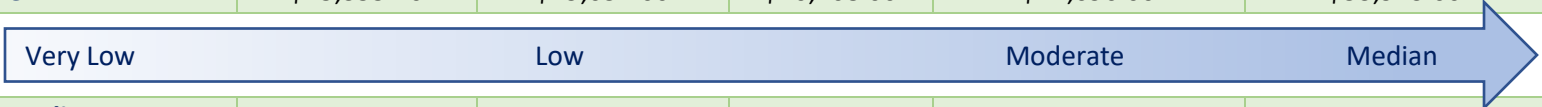
- The median gross rent in Clinton County is \$810 and ranges from a low of \$735 for a studio to \$1,345 for a four-bedroom.
- A typical accommodation/food services and retail trade employee cannot even afford a studio at this cost.

Employment Sector		Accommodation and Food Services	Retail Trade	Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>		\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
						
<b>% of County's Median Household Income</b>		43%	49%	69%	74%	91%
<b>Monthly Income</b>		\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$ 4,492.80
<b>Affordable Rent Payment (@ 30%)</b>		\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Studio</b>	<b>Median Rent</b>	\$735.00				
	<b>Price Difference from Median</b>	(\$101.12)	(\$8.56)	\$284.20	\$367.40	\$612.84
<b>One-Bedroom</b>	<b>Median Rent</b>	\$740.00				
	<b>Price Difference from Median</b>	(\$106.12)	(\$13.56)	\$279.20	\$362.40	\$607.84
<b>Two-Bedroom</b>	<b>Median Rent</b>	\$939.00				
	<b>Price Difference from Median</b>	(\$305.12)	(\$212.56)	\$80.20	\$163.40	\$408.84
<b>Three-Bedroom</b>	<b>Median Rent</b>	\$1,222.00				
	<b>Price Difference from Median</b>	(\$588.12)	(\$495.56)	(\$202.80)	(\$119.60)	\$125.84
<b>Four-Bedroom</b>	<b>Median Rent</b>	\$1,345.00				
	<b>Price Difference from Median</b>	(\$711.12)	(\$618.56)	(\$325.80)	(\$242.60)	\$2.84

# FORWARD *together* Housing Gap Analysis

## Essex County Homeownership Gap Analysis

- The median home value in Essex County is \$159,130. To afford a home at this price, an Essex County household needs to make 73% of the median income for the county, or \$39,086.
- A typical accommodation/food services and retail trade employee (representing 27% of the County’s employees, or 4,298 people) cannot afford to purchase a home at this cost.

Employment Sector	Accommodation and Food Services	Retail Trade	Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
					
<b>% of County's Median Household Income</b>	47%	54%	76%	82%	100%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$4,492.80
<b>Affordable Monthly Household Cost (@ 30% for PITI)</b>	\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Affordable Monthly Mortgage Payment</b>	\$443.72	\$508.51	\$713.44	\$771.68	\$943.49
<b>Affordable 30-Year Mortgage @ 4% interest</b>	\$93,000.79	\$106,615.77	\$149,345.86	\$161,704.08	\$197,521.95
<b>Affordable Home Price</b>	\$103,334.21	\$118,461.97	\$165,939.84	\$179,671.20	\$219,468.83
<b>Median Home Value</b>	\$159,129.50				
<b>Price-Difference from Median</b>	(\$55,795.29)	(\$40,667.53)	\$6,810.34	\$20,541.70	\$60,339.33



# FORWARD *together* Housing Gap Analysis

## Essex County Rental Gap Analysis

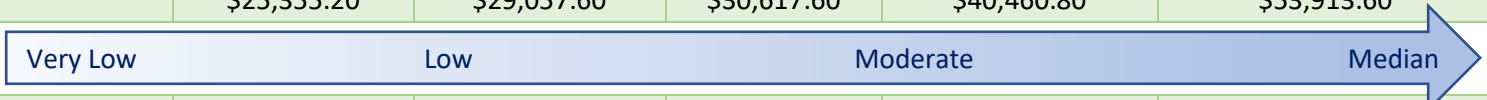
- The median gross rent in Essex County is \$812 and ranges from a low of \$732 for a studio to \$1,251 for a four-bedroom.
- A typical accommodation/food services and retail trade employee cannot even afford a studio at this cost.

Employment Sector		Accommodation and Food Services		Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>		\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
		Low		Moderate		Median
<b>% of County's Median Household Income</b>		47%	54%	76%	82%	100%
<b>Monthly Income</b>		\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$4,492.80
<b>Affordable Rent Payment (@ 30%)</b>		\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Studio</b>	<b>Median Rent</b>	\$732.00				
	<b>Price Difference from Median</b>	(\$98.12)	(\$5.56)	\$287.20	\$370.40	\$615.84
<b>One-Bedroom</b>	<b>Median Rent</b>	\$774.00				
	<b>Price Difference from Median</b>	(\$140.12)	(\$47.56)	\$245.20	\$328.40	\$573.84
<b>Two-Bedroom</b>	<b>Median Rent</b>	\$919.00				
	<b>Price Difference from Median</b>	(\$285.12)	(\$192.56)	\$100.20	\$183.40	\$428.84
<b>Three-Bedroom</b>	<b>Median Rent</b>	\$1,246.00				
	<b>Price Difference from Median</b>	(\$612.12)	(\$519.56)	(\$226.80)	(\$143.60)	\$101.84
<b>Four-Bedroom</b>	<b>Median Rent</b>	\$1,251.00				
	<b>Price Difference from Median</b>	(\$617.12)	(\$524.56)	(\$231.80)	(\$148.60)	\$96.84

# FORWARD *together* Housing Gap Analysis

## Hamilton County Homeownership Gap Analysis

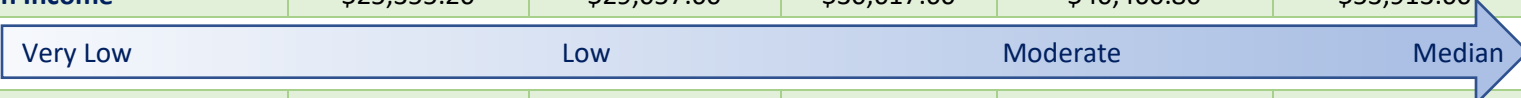
- The median home value in Hamilton County is \$193,785. To afford a home at this price, a Hamilton County household needs to make 85% of the median income for the county, or \$47,600.
- A typical accommodation/food services, retail trade, and arts, entertainment, and recreation employee (representing 31% of the County’s employees, or 657 people) cannot afford to purchase a home at this cost.

Employment Sector	Accommodation and Food Services	Retail Trade	Arts, Entertainment & Recreation	Construction	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$30,617.60	\$40,460.80	\$53,913.60
					
<b>% of County's Median Household Income</b>	45%	52%	54%	90%	96%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$2,551.47	\$4,205.07	\$4,492.80
<b>Affordable Monthly Household Cost (@ 30% for PITI)</b>	\$633.88	\$726.44	\$765.44	\$1,261.52	\$1,347.84
<b>Affordable Monthly Mortgage Payment</b>	\$443.72	\$508.51	\$535.81	\$883.06	\$943.49
<b>Affordable 30-Year Mortgage @ 4% interest</b>	\$93,000.79	\$106,615.77	\$112,271.22	\$184,954.28	\$197,521.95
<b>Affordable Home Price</b>	\$103,334.21	\$118,461.97	\$124,745.80	\$205,504.76	\$219,468.83
<b>Median Home Value</b>	\$193,784.50				
<b>Price-Difference from Median</b>	(\$90,450.29)	(\$75,322.53)	(\$69,038.70)	\$11,720.26	\$25,684.33

# FORWARD *together* Housing Gap Analysis

## Hamilton County Rental Gap Analysis

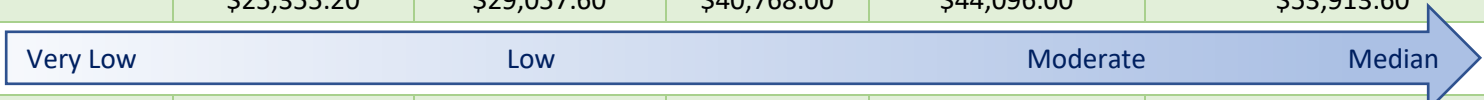
- The median gross rent in Clinton County is \$783 and ranges from a low of \$757 for a studio to \$1,434 for a four-bedroom.
- A typical accommodation/food services and retail trade employee cannot even afford a studio at this cost. A typical employee in each of the County's top five employment sectors cannot afford a four-bedroom rental at this cost.

Employment Sector	Accommodation and Food Services	Retail Trade	Arts, Entertainment & Recreation	Construction	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$30,617.60	\$40,460.80	\$53,913.60
					
<b>% of County's Median Household Income</b>	45%	52%	54%	90%	96%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$2,551.47	\$4,205.07	\$4,492.80
<b>Affordable Rent Payment (@ 30%)</b>	\$633.88	\$726.44	\$765.44	\$1,261.52	\$1,347.84
<b>Studio</b>	<b>Median Rent</b>	\$757.00			
	<b>Price Difference from Median</b>	(\$123.12)	(\$30.56)	\$8.44	\$504.52
<b>One-Bedroom</b>	<b>Median Rent</b>	\$762.00			
	<b>Price Difference from Median</b>	(\$128.12)	(\$35.56)	\$3.44	\$499.52
<b>Two-Bedroom</b>	<b>Median Rent</b>	\$1,004.00			
	<b>Price Difference from Median</b>	(\$370.12)	(\$277.56)	(\$238.56)	\$257.52
<b>Three-Bedroom</b>	<b>Median Rent</b>	\$1,249.00			
	<b>Price Difference from Median</b>	(\$615.12)	(\$522.56)	(\$483.56)	\$12.52
<b>Four-Bedroom</b>	<b>Median Rent</b>	\$1,434.00			
	<b>Price Difference from Median</b>	(\$800.12)	(\$707.56)	(\$668.56)	(\$172.48)

# FORWARD *together* Housing Gap Analysis

## Warren County Homeownership Gap Analysis

- The median home value in Warren County is \$220,332. To afford a home at this price, a Warren County household needs to make 93% of the median income for the county, or \$54,114.
- A typical employee in each of the County’s top five employment sectors (representing 63% of the County’s employees, or 25,617 people) cannot afford to purchase a home at this cost.

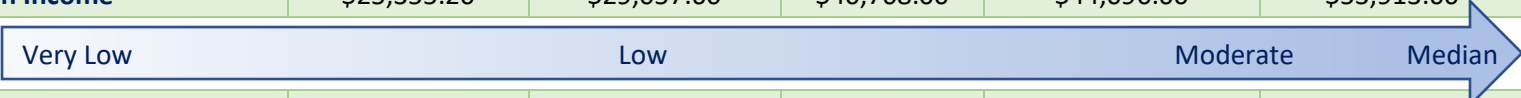
Employment Sector	Accommodation and Food Services	Retail Trade	Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
					
<b>% of County's Median Household Income</b>	44%	50%	70%	76%	93%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$ 4,492.80
<b>Affordable Monthly Household Cost (@ 30% for PITI)</b>	\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Affordable Monthly Mortgage Payment</b>	\$443.72	\$508.51	\$713.44	\$771.68	\$943.49
<b>Affordable 30-Year Mortgage @ 4% interest</b>	\$93,000.79	\$106,615.77	\$149,345.86	\$161,704.08	\$197,521.95
<b>Affordable Home Price</b>	\$103,334.21	\$118,461.97	\$165,939.84	\$179,671.20	\$219,468.83
<b>Median Home Value</b>	\$220,332.00				
<b>Price-Difference from Median</b>	(\$116,997.79)	(\$101,870.03)	(\$54,392.16)	(\$40,660.80)	(\$863.17)



# FORWARD *together* Housing Gap Analysis

## Warren County Rental Gap Analysis

- The median gross rent in Warren County is \$929 and ranges from a low of \$715 for a studio to \$1,458 for a four-bedroom.
- A typical accommodation/food services employee cannot even afford a studio at this cost. A typical employee in each of the County's top five employment sectors cannot afford a three-bedroom rental at this cost.

Employment Sector	Accommodation and Food Services	Retail Trade	Health Care & Social Assistance	Manufacturing	Government
<b>Median Income</b>	\$25,355.20	\$29,057.60	\$40,768.00	\$44,096.00	\$53,913.60
					
<b>% of County's Median Household Income</b>	44%	50%	70%	76%	93%
<b>Monthly Income</b>	\$2,112.93	\$2,421.47	\$3,397.33	\$3,674.67	\$ 4,492.80
<b>Affordable Rent Payment (@ 30%)</b>	\$633.88	\$726.44	\$1,019.20	\$1,102.40	\$1,347.84
<b>Studio</b>	<b>Median Rent</b>	\$715.00			
	<b>Price Difference from Median</b>	(\$81.12)	\$11.44	\$304.20	\$387.40
<b>One-Bedroom</b>	<b>Median Rent</b>	\$839.00			
	<b>Price Difference from Median</b>	(\$205.12)	(\$112.56)	\$180.20	\$263.40
<b>Two-Bedroom</b>	<b>Median Rent</b>	\$1,062.00			
	<b>Price Difference from Median</b>	(\$428.12)	(\$335.56)	(\$42.80)	\$40.40
<b>Three-Bedroom</b>	<b>Median Rent</b>	\$1,386.00			
	<b>Price Difference from Median</b>	(\$752.12)	(\$659.56)	(\$366.80)	(\$283.60)
<b>Four-Bedroom</b>	<b>Median Rent</b>	\$1,458.00			
	<b>Price Difference from Median</b>	(\$824.12)	(\$731.56)	(\$438.80)	(\$355.60)

### Washington County Homeownership Gap Analysis

- The median home value in Washington County is \$160,988. To afford a home at this price, a Washington County household needs to make 69% of the median income for the county, or \$39,543.
- A typical retail trade employee (representing 11% of the County’s employees, or 1,968 people) cannot afford to purchase a home at this cost.

Employment Sector	Retail Trade	Health Care & Social Assistance	Manufacturing	Construction	Government
<b>Median Income</b>	\$29,057.60	\$40,768.00	\$44,096.00	\$50,460.80	\$53,913.60
<b>% of County's Median Household Income</b>	51%	72%	77%	89%	95%
<b>Monthly Income</b>	\$2,421.47	\$3,397.33	\$3,674.67	\$4,205.07	\$4,492.80
<b>Affordable Monthly Household Cost (@ 30% for PITI)</b>	\$726.44	\$1,019.20	\$1,102.40	\$1,261.52	\$1,347.84
<b>Affordable Monthly Mortgage Payment</b>	\$508.51	\$713.44	\$771.68	\$883.06	\$943.49
<b>Affordable 30-Year Mortgage @ 4% interest</b>	\$106,615.77	\$149,345.86	\$161,704.08	\$184,954.28	\$197,521.95
<b>Affordable Home Price</b>	\$118,461.97	\$165,939.84	\$179,671.20	\$205,504.76	\$219,468.83
<b>Median Home Value</b>	\$160,987.50				
<b>Price-Difference from Median</b>	(\$42,525.53)	\$4,952.34	\$18,683.70	\$44,517.26	\$58,481.33

# FORWARD *together* Housing Gap Analysis

## Washington County Rental Gap Analysis

- The median gross rent in Washington County is \$855 and ranges from a low of \$715 for a studio to \$1,458 for a four-bedroom.
- A typical employee in each of the County's top five employment sectors cannot afford a three-bedroom rental at this cost.

Employment Sector		Health Care & Social Assistance				Government
Retail Trade		Assistance	Manufacturing	Construction	Government	
Median Income		\$29,057.60	\$40,768.00	\$44,096.00	\$50,460.80	\$53,913.60
		Very Low	Low	Moderate		Median 
% of County's Median Household Income		51%	72%	77%	89%	95%
Monthly Income		\$2,421.47	\$3,397.33	\$3,674.67	\$4,205.07	\$4,492.80
Affordable Rent Payment (@ 30%)		\$726.44	\$1,019.20	\$1,102.40	\$1,261.52	\$1,347.84
Studio	Median Rent	\$715.00				
	Price Difference from Median	\$11.44	\$304.20	\$387.40	\$546.52	\$632.84
One-Bedroom	Median Rent	\$839.00				
	Price Difference from Median	(\$112.56)	\$180.20	\$263.40	\$422.52	\$508.84
Two-Bedroom	Median Rent	\$1,062.00				
	Price Difference from Median	(\$335.56)	(\$42.80)	\$40.40	\$199.52	\$285.84
Three-Bedroom	Median Rent	\$1,386.00				
	Price Difference from Median	(\$659.56)	(\$366.80)	(\$283.60)	(\$124.48)	(\$38.16)
Four-Bedroom	Median Rent	\$1,458.00				
	Price Difference from Median	(\$731.56)	(\$438.80)	(\$355.60)	(\$196.48)	(\$110.16)

### Methodology and Data Sources

#### Housing Data

Baseline information on housing types for each county was assembled based on 2015-2019 ACS Five-Year estimates. Median home values were calculated for each county by averaging two data sources: 2015-2019 ACS Five-Year estimated median home values and April 2021 Zillow Home Value Index data. Median rental rates were identified by unit size for each county using HUD 50% data from May 2021.

#### Income Data

The median household incomes used in this analysis are consistent with the May 2021 “5-County Region Economic Profile.” Median incomes for the top five sectors of each county were also identified based on May 2020 national data from the U.S. Bureau of Labor and Statistics (BLS). These median sector income levels are presented in comparison to each County’s median household income and associated income brackets of very low (30%), low (50%), moderate (80%), and median (100%).

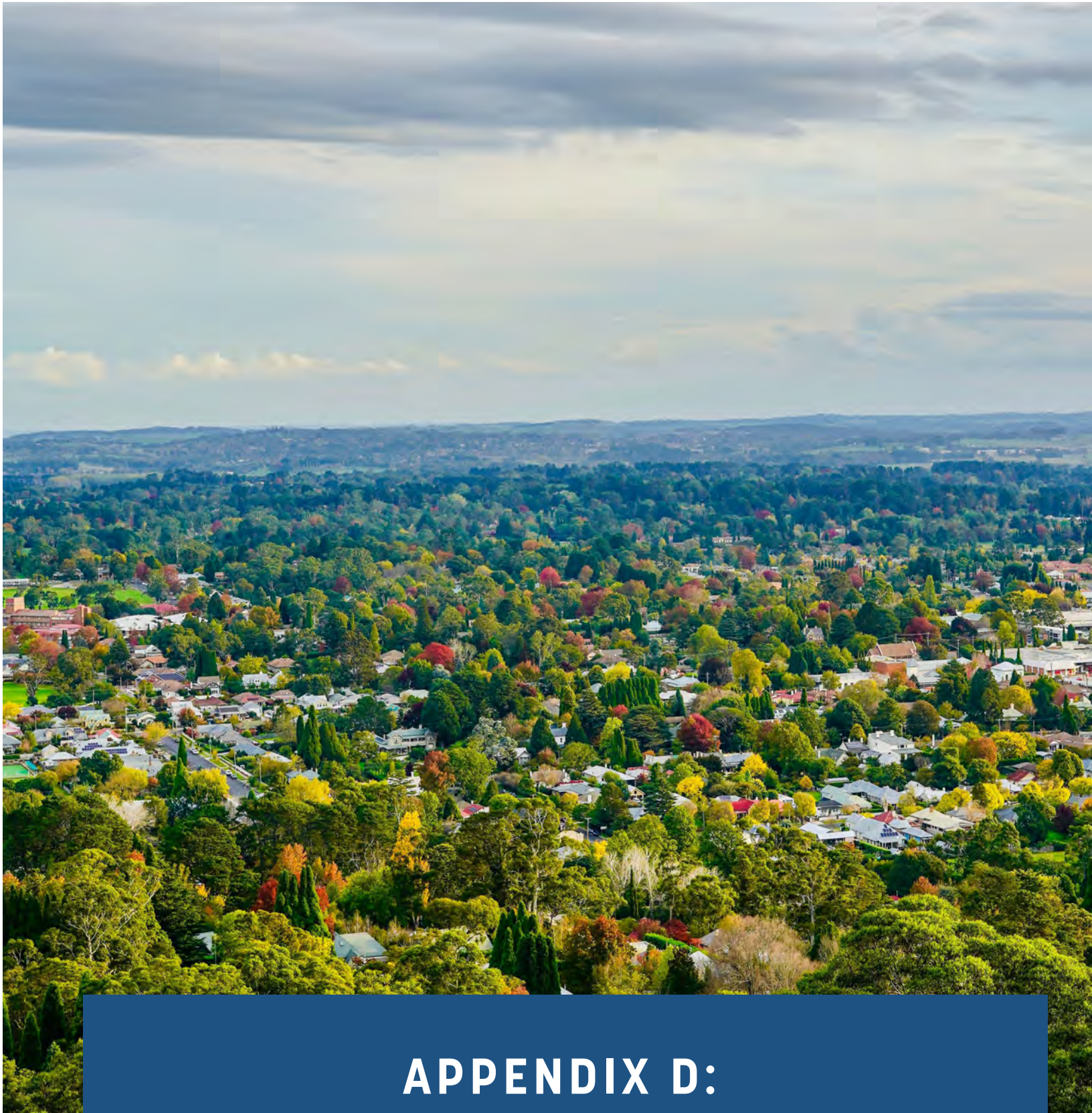
#### Determining Affordable Monthly Costs

It is generally accepted by both lending institutions and the U.S. Department of Housing and Urban Development (HUD) that housing costs are “reasonable” (or considered affordable) when a family or individual pays no more than 30 percent of gross household income on housing costs. In terms of homeownership, the 30% includes principal, interest, taxes, and insurance (PITI).

#### Translating Affordable Monthly Costs to Home Values

Based on a review of housing market data in the region, mortgages were assumed to represent 70% of monthly homeowner costs, with the remaining 30% including taxes and insurance. The maximum monthly mortgage costs were then converted to home purchase prices assuming a 10% down payment and 30-year fixed mortgage at a 4% interest rate.





# APPENDIX D: INFRASTRUCTURE INVENTORY

## Infrastructure Inventory

In preliminary conversations with Working Group members, the importance of addressing infrastructure needs was repeatedly raised as a priority needed for the region’s long-term economic growth. Specifically, child care, broadband, and cellular were all cited as infrastructure that were lacking before the pandemic, and that the pandemic has put a greater spotlight on their inadequacy, with increased and more diverse needs for child care, broadband, and cellular than ever before. Water and sewer infrastructure have always been key drivers to economic development, but with lagging infrastructure and pandemic-exacerbated strains on local economies, improving and expanding water and sewer infrastructure has become increasingly more difficult.

The Chazen Companies undertook a preliminary infrastructure inventory to identify next steps and focus areas for stakeholder outreach. As outlined below, it is clear that child care capacity has been continually decreasing in recent years, but a greater understanding of the reasons for this decline is needed. For water and sewer infrastructure, the publicly available data on “needs” that is available is not comprehensive; the LCLGRP conducted preliminary outreach to refine the list of the region’s water and sewer infrastructure needs and will continue to do so. For broadband and cellular, there is generally a lack of comprehensive data. The LCLGRP and partner organizations across the region are working to address this data gap, including broadband surveys that are currently underway in Warren and Washington Counties, and plans to initiate a broadband study for Clinton, Essex, and Hamilton Counties.



# FORWARD *together*

## *Economic Resiliency Plan*

### Child Care

Child care continues to be a critical need to maintain and grow our workforce. The LCLG region did not have adequate child care to meet residents' needs prior to the pandemic. Stay at home mandates and the closure of schools and adapting to remote learning created unprecedented demands on child care, which, coupled with the additional restrictions and regulations on child care facilities and associated financial hardships, have led to the child care crisis the region is facing today.

### Decline in Child Care Availability

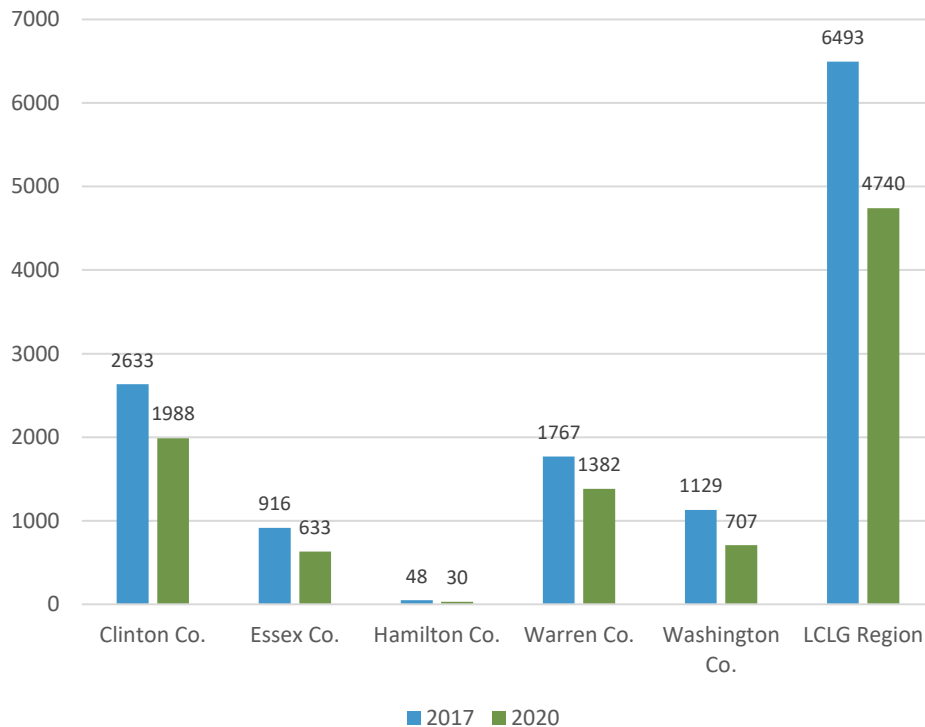
The Southern Adirondack Child Care Network's (SACCN's) 2019 *Child Care Community Needs Assessment* found that the supply of child care in Warren, Washington, and Hamilton Counties declined by 30% over the 2012-2019 period, a trend occurring throughout New York and nationally. With the pandemic forcing the closure of many child care centers and school closures resulting in an increased need for child care services, this need has been further exacerbated.

*“Economic development begins at birth. Investing in quality child care is an economic plan for the future growth of our communities.” - SACCN*

In 2017, the New York State Office of Children and Family Services released the *New York State Child Care Demographics* report, which identified, among other things, child care availability and need, by County. This report was cited in 2019 REDC Strategic Plans, highlighting the Governor prioritizing child care for the 2019 Consolidated Funding Application (CFA) cycle. We reviewed current (January 2021) NYS Division of Child Care Services data to identify the changes that have occurred since 2017. Notably:

- The number of regulated child care programs in the five-county region has decreased from 295 to 239 (a 19% decrease) between 2017 and 2021. With the exception of Clinton County (which only had the number of programs decrease by 8%), each county lost more than 25% of its child care facilities.
- The capacity of regulated child care programs for the region decreased 27 % from 6,493 to 4,740 children. Hamilton and Washington counties had the most significant decreases (38% and 39%, respectively). It is also worth noting that these 2021 numbers may not be painting the full picture, as many programs are not currently operating at their full capacity due to additional COVID-related restrictions.
- In 2017, 15 cities/towns in the five-county region were considered “high need”; defined as having 3 or more children for every one child care slot and 25% or more of the population at or below 200% of Federal Poverty Level. This number increased to 22 cities/town in 2021 (a 50% increase). *Refer to map of high need communities on the following page.*
- Thirty-one towns in the region have no regulated child care facilities. This compares to 23 in 2017.

## Capacity of Regulated Child Care Programs



Also a critical shortfall is child care options for non-traditional hours of care. Almost one-third of the SACCN’s child care requests in 2019 were for some version of non-traditional hours of care, and the Childcare Coordinating Council of the North Country (CCCNC) reported in 2019 that 20% of parents and employers need child care for non-traditional hours. Based on January 2021 child care data, only two child care providers in the entire five-county LCLG region offer weekend or evening care.

### Challenges Facing Providers

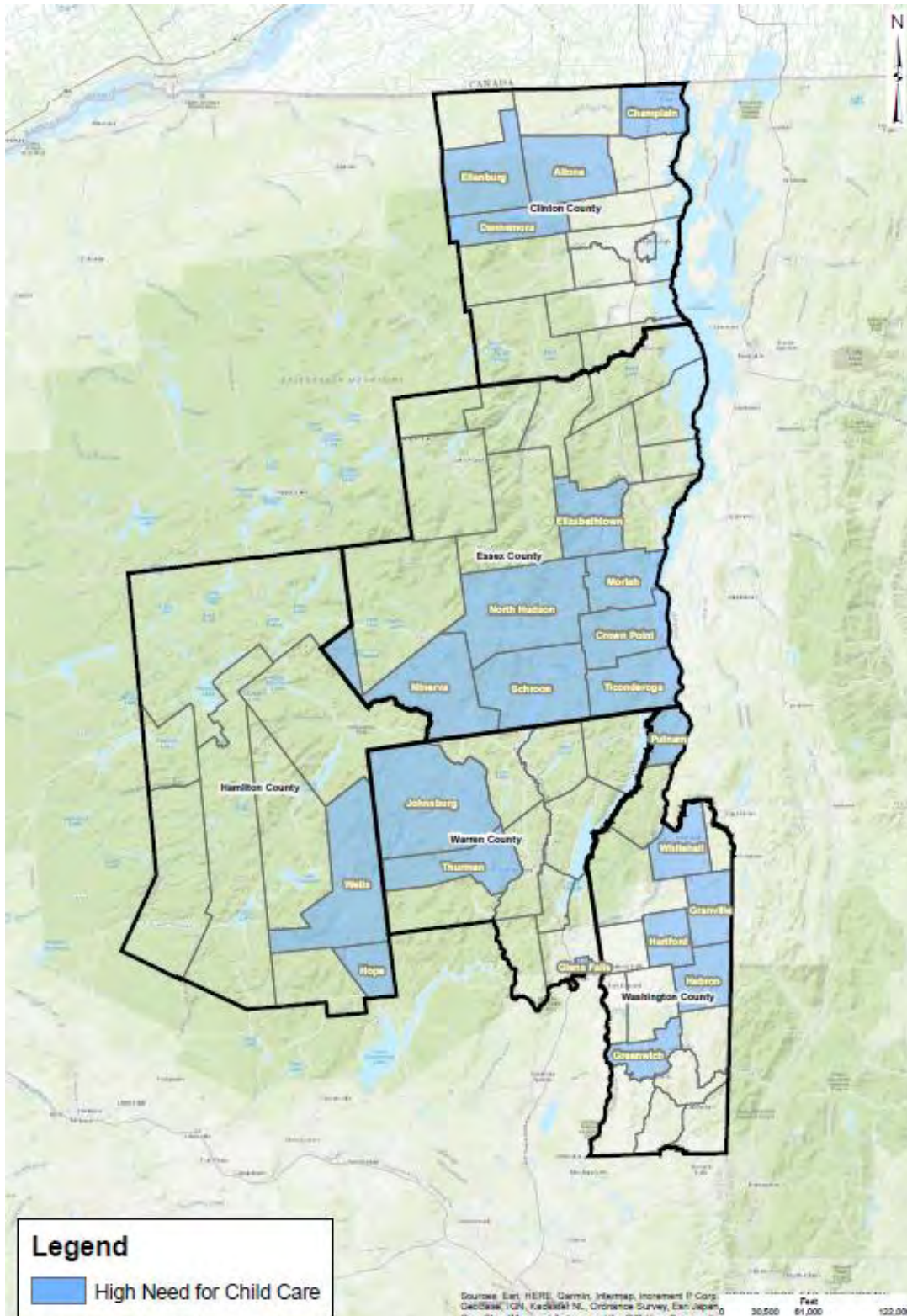
The CCCNC identified several reasons for the decline in child care centers in the region that existed pre-COVID, including many providers retiring and the limited income potential. CCCNC’s 2019 Child Care Deserts in the North Country report indicates that 56% of home child care providers are over age 45, and most child care center staff – including those at the highest level – make less than \$31,000 a year, making it difficult to attract and retain staff. Other challenges cited in the 2019 report include the loss of preschool-age enrollment to UPK and Headstart programs.

These economic realities were exacerbated with COVID, with additional PPE supplies needed to continue operating and required reductions in capacity needed to maintain social distancing. North Country Public Radio reports that many child care centers that have remained open are operating at a loss, and many child care providers are opting for early retirement.



# FORWARD *together*

*Economic Resiliency Plan*



# FORWARD *together*

## *Economic Resiliency Plan*

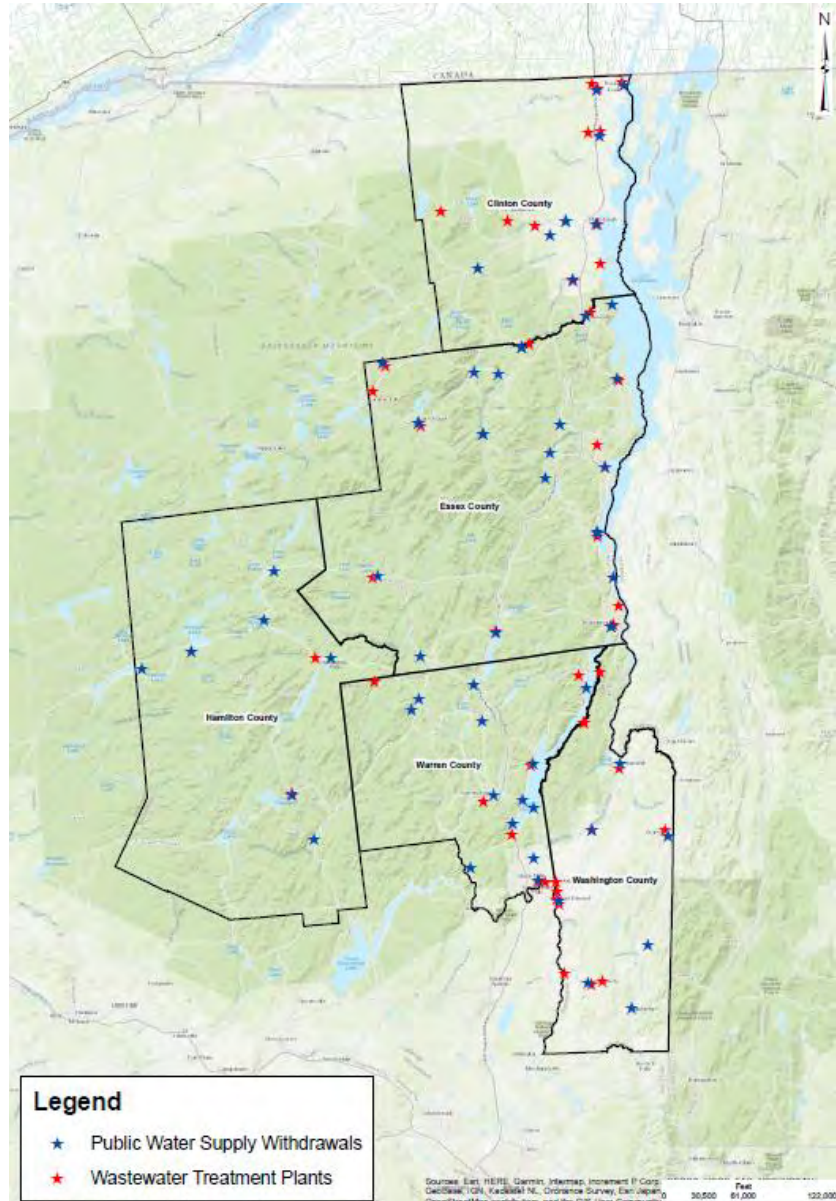
### Water & Sewer Infrastructure

Access to water and sewer infrastructure is an important consideration for development within the region's population centers. The LCLGRP Comprehensive Economic Development Strategy (CEDS) historically has included an inventory of local capital project needs, with particular focus on water and sewer needs. A summary of capital project needs is generally not available on a county by county basis. To develop a baseline understanding of the region's infrastructure needs, U.S. Environmental Protection Agency (EPA) and New York State Environmental Facilities Corporation (NYSEFC) data were reviewed, in addition to a review of relevant planning documents in the region.

### Wastewater

There are 46 permitted wastewater treatment plants in the five-county region, including 36 municipal facilities and ten facilities serving industrial uses. Treatment facilities are spread

throughout the region, with locations corresponding to higher population densities associated cities, denser hamlets, and settled areas. Facilities with the highest permitted capacity are the City of Plattsburgh Water Pollution Control Plant, which has a permitted discharge design flow of 16 million gallons per day (MGD), and the Glens Falls Sewer Treatment Plan, which has a permitted discharge design flow of 9.5 MGD. Twenty-six of the 36 permitted municipal facilities have design flows of less than one MGD. Information on the age and treatment methodology for each municipal WWTP is provided in the appendix.





# FORWARD *together*

## *Economic Resiliency Plan*

### Water

Public water supply withdrawals were also mapped and reviewed. There are a total of 60 water public water supply withdrawal facilities serving the LCLG region, including nine in Clinton County, 24 in Essex County, seven in Hamilton County, 13 in Warren County, and six in Washington County; the water supply for the Village of Fort Edward (in Washington County) is located outside of the LCLG region in the Town of Moreau (in Saratoga County).

### Documenting the Region's Infrastructure Needs

Beyond availability, the age, capacity, and condition of infrastructure is also crucial. Many communities across the region struggling to obtain the funds needed to make the improvements needed to serve both existing and future residents and businesses. Already financially burdened, infrastructure needs further create financial stress to local government.

To establish a baseline picture of infrastructure needs, several public data sets were review. The New York State Environmental Facilities Corporation (NYSEFC) is a public benefit corporation that provides low-cost capital and grants for water quality improvement projects. They are the primary source and central clearinghouse for low-cost financial assistance for local wastewater and drinking water infrastructure through the Clean Water and Drinking Water State Revolving Funds.

NYSEFC annually prepares an Intended Use Plan (IUP), which provides information about how the Drinking Water State Revolving Fund (DWSRF) and the Clean Water State Revolving Loan Fund (CWSRF) work, the type of financial assistance available, the sources and uses of the funds, and projects that are eligible for D/CWSRF financial assistance.

IUPs are published for both SRF programs and serve as an inventory of water and wastewater capital project needs. NYSEFC solicits municipalities to list their project needs and develops two lists of eligible projects: the Multi-Year Project Priority List, which identifies all projects for which applicants have expressed an interest in receiving financial assistance and is the first step in preparing a project for financing; and the Annual Project Priority List, which identifies projects that NYSEFC may provide financial assistance to in the IUP Period. A project may receive financial assistance in the IUP period only if it is on the Annual List. Each project seeking SRF financial assistance is scored using criteria established by NYSEFC. A project's rank relative to other projects in its category determines the type of financial assistance available

The 2021 IUPs for the five counties were revised as a means of quantifying local infrastructure needs. As indicated in the table on the following page, \$242 Million in wastewater needs and \$189 Million in drinking water needs are documented in the 2021 IUPs. It is important to note, that this is not an exhaustive inventory of needs, as not all municipalities respond to the NYSEFC solicitation. However, this information serves as an indicator. Chazen is currently assisting the LCLGRP to refine these lists through outreach.

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## *Economic Resiliency Plan*

### Wastewater and Drinking Water Infrastructure Needs

County	Wastewater Infrastructure Projects		Water Infrastructure Projects	
	Number	Dollar Value	Number	Dollar Value
Clinton	14	\$ 70,658,826	34	\$ 95,742,087
Essex	12	\$ 52,151,337	23	\$ 46,404,126
Hamilton	1	\$ 748,753	4	\$ 6,577,061
Warren	20	\$ 60,899,577	25	\$ 28,215,550
Washington	10	\$ 57,569,186	15	\$ 12,321,944
<b>LCLG Region</b>	<b>57</b>	<b>\$ 242,027,679</b>	<b>101</b>	<b>\$ 189,260,768</b>

To add to this one preliminary data source, the EPA's Clean Watersheds Needs Survey (CWNS) was also reviewed. The CWNS is an assessment of capital investment needed for publicly-owned wastewater collection and treatment facilities to meet the water quality goals of the Clean Water Act. This list also serves as an indicator of local infrastructure needs and serves as a report to the US Congress. This survey was intended to be updated on a five-year cycle, and this has not occurred; the most recent CWNS is from 2012.

The table below identifies the total needs (by category and associated cost) for each county in the LCLG region, based on the 2012 CWNS. As indicated in the table, the CWNS identified over \$250 million in needed improvements in the region.

### Public Wastewater Collection/Treatment Improvement Needs (2012 CWNS)

Category	Clinton County	Essex County	Hamilton County	Warren County	Washington County	LCLG Region
Secondary Wastewater Treatment	\$11,794,626	\$37,363,083	\$588,232	\$14,131,884	\$9,754,593	<b>\$73,632,418</b>
Advanced Wastewater Treatment	\$11,556,323	--	--	--	--	<b>\$11,556,323</b>
Infiltration/ Inflow (I/I) Correction	--	\$2,244,133	--	\$1,605,073	\$13,033,305	<b>\$16,882,511</b>
Replacement/ Rehabilitation of Sewers	\$10,122,499	\$3,912,846	--	\$47,757,935	\$634,879	<b>\$62,428,159</b>
New Collector Sewers	\$19,388,447	\$13,361,855	\$5,644,511	\$13,064,288	\$27,995,920	<b>\$79,455,021</b>
New Interceptor Sewers	\$1,569,023	--	--	\$974,862	\$4,545,186	<b>\$7,089,071</b>
<b>Totals</b>	<b>\$54,891,253</b>	<b>\$57,280,951</b>	<b>\$6,232,743</b>	<b>\$106,848,954</b>	<b>\$79,010,789</b>	<b>\$251,043,503</b>



# FORWARD *together*

## *Economic Resiliency Plan*

As another point of reference to understanding infrastructure needs on the five-county region, the Adirondack Council prepared “Wastewater Treatment Plants in the Adirondacks: Status of Compliance and Operational Needs” in 2017. This report documented in excess of \$100 million dollars of clean water infrastructure needs at 22 facilities in the Adirondack Park. We note the report includes areas outside the five-county region (although minor) and does not include Washington County or those areas outside the blueline. In 2021, the LCLGRP conducted preliminary outreach to refine the list of the region’s water and sewer infrastructure needs and will continue to work to create a comprehensive list of the region’s infrastructure needs.

### Broadband and Cellular

Access to broadband and cellular service has been a topic of conversation locally, regionally as well as at the State/National level for years. The LCLG region is largely rural with vast distances between populated areas; the availability of reliable cellular service is not guaranteed, and digital connectivity is similarly sporadic.

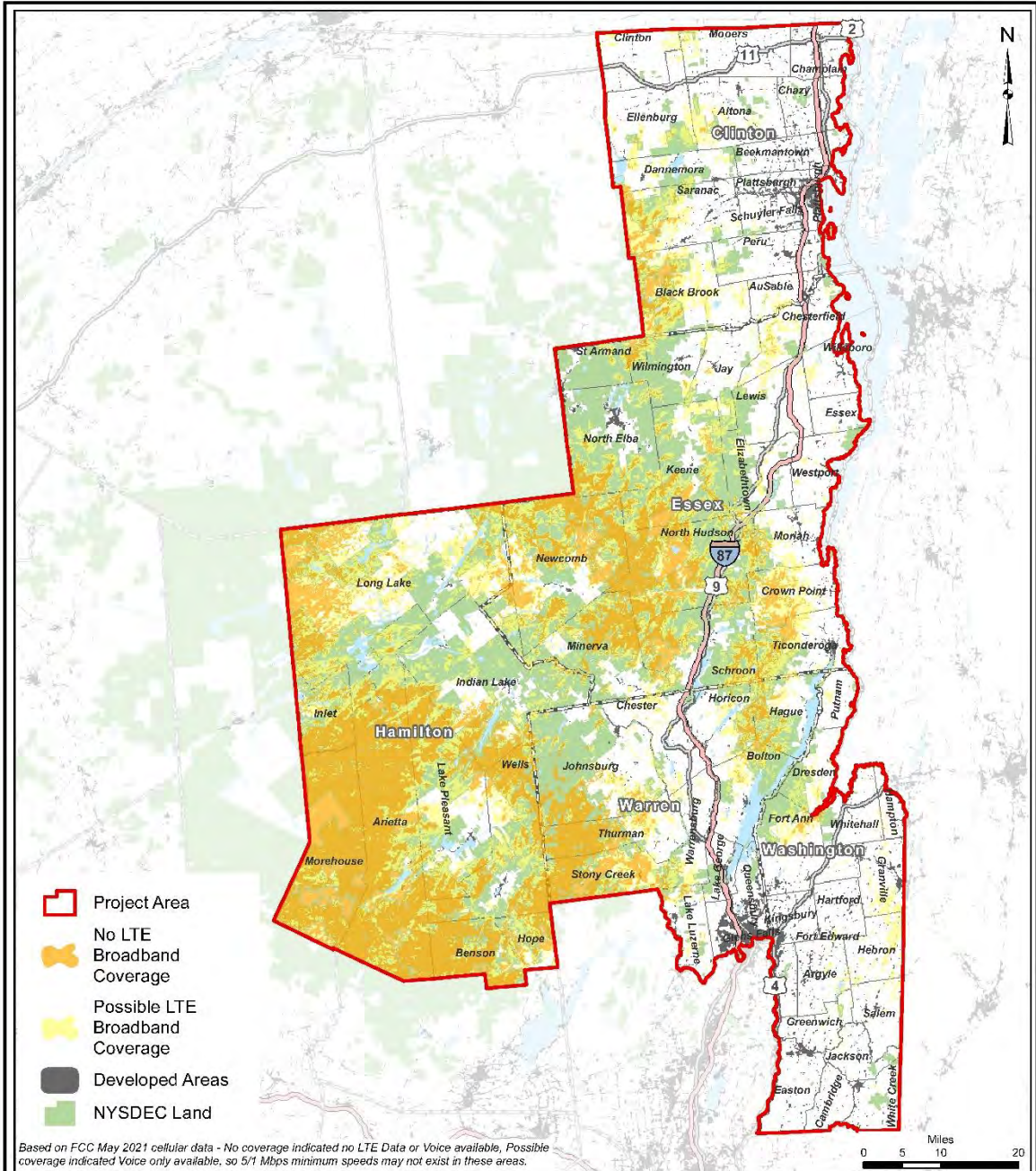
The pandemic has brought new challenges, and what was once thought of as a convenience has been transformed into an absolute necessity. Small business, parents/teachers, and the healthcare community have shifted to telework, remote schooling, and telemedicine. The consumer economy has shifted from bricks and mortar to online purchases. Broadband and cellular connectivity is also a critical component of workforce development and attracting both residents and businesses to the region.

Accurate information on what services are available, who actually provides services, and the speed, quality and reliability of services is lacking. As the FCC noted in their 2019 *Mobility Fund Phase II Coverage Maps Investigation Staff Report*, “accurate broadband data is essential to bridging the digital divide.” New York has made progress. As recently as January 11, 2021, the NYS Governor stated in his State of the State address that “98% of the state now has access to broadband.” However, 2019 Census data indicate that 11% of households statewide do not have internet access. The LCLGRP and partner organizations across the region are working to collect accurate data on broadband access, including surveys that are currently underway in Warren and Washington Counties, and plans to initiate a broadband study for Clinton, Essex, and Hamilton Counties.

Cellular service coverage is also not uniform across the region. Coverage varies by geography and provider. The figure on the following page presents cellular broadband “dead zones” based on FCC data from May 2021. As shown in the map, large portions of Hamilton and Essex Counties have no LTE broadband coverage. In terms of cellular data subscriptions, based on 2019 ACS data, Hamilton County also has the smallest percentage of residents with cellular data plans (29%, compared to 64% in the region and 77% statewide). Despite having the best coverage in the five-county region, only 54% of Washington County residents have cellular data plans, potentially indicative of other factors, such as cost or age.

# FORWARD *together*

## Economic Resiliency Plan



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**LCLGRP Economic Recovery & Resiliency Plan**

**Cellular Broadband "Dead Zones"**

Clinton, Essex, Hamilton, Warren and Washington Counties, NY

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APPENDIX:

REGIONAL WWTP TREATMENT METHODOLOGY

## LCLG Region Municipal WWTPs

County	Municipality	Year Built	Year Updated	Treatment Methodology			
				Primary (Primary Settling)	Secondary (Biological Treatment)	Tertiary (Filters)	Disinfection
Clinton	V. of Champlain	1963	1998	Mechanically Cleaned Clarifier	Extended Aeration/ Mixing – Fine Bubble		
	T. of Chazy			Not Specified	Sequencing Batch Reactor	Multimedia (Dual Media) Filtration	
	T. of Dannemora – Lyon Mt. SD	1992		Septic Tank	Conventional Activated Sludge		
	V. of Dannemora	1981	1999	Not Specified	Not Specified		Hypochlorite-In Discharge Pipe/ Hypochlorite-Seasonal
	V. of Keeseville	1968		Not Specified	Secondary Clarifier/ High Rate Trickling Filter/ Synthetic Media Trick Filter (Biotower)		Chlorine Gas-Contact Tank
	T. of Peru – Peru SD #1	1939	1985	Not Specified	Not Specified		
	T. of Peru – Valcour SD	1986		Settling Tank	Not Specified	Sand Filters (Not Specified)	Hypochlorite Disinfection
	C. of Plattsburgh	1973	1987	Mechanically Cleaned Clarifier	Conventional Activated Sludge		Dechlorination/ Hypochlorite-Contact Tank/ Seasonal
	T. of Plattsburgh – Cadyville	1997		Not Specified	Extended Aeration/ Secondary Clarifier		Ultraviolet
	T. of Plattsburgh - Champlain Park	1956	1977	Mechanically Cleaned Clarifier	Secondary Clarifier/ Covered Trickling Filter/ High Rate Trickling Filter		Hypochloite-Contact Tank
	V. of Rouses Point	1986	2003	Not Specified	Oxidation Ditch/ Secondary Clarifier		Hypochlorite-Contact Tank
Essex	T. of Black Brook/T. of Jay	1991		Not Specified	Not Specified		
	Crown Point SD		1992	Septic Tank	Rotating Biological Contract/ Secondary Clarifier		
	V. of Lake Placid	1973	2004	Mechanically Cleaned Clarifier	Conventional Activated Sludge		
	T. of Newcomb	1962		Not Specified	Extended Aeration		
	T. of Port Henry/Moriah	1964	1987	Two Story (Clarifester)/ Imhoff Tank/ Doten Tank	Not Specified		Chlorine Gas-Contact Tank
	V. of Saranac Lake	1932	1973	Mechanically Cleaned Clarifier	Conventional Activated Sludge		



County	Municipality	Year Built	Year Updated	Treatment Methodology			
				Primary (Primary Settling)	Secondary (Biological Treatment)	Tertiary (Filters)	Disinfection
Essex	T. of Schoon	1973		Not Specified	Extended Aeration	Rapid Sand (High Rate) Filters	Hypochlorite-Contact Tank
	T. of St. Armand	1986	1991	Not Specified			
	T. of Ticonderoga	1979		Not Specified	Extended Aeration		
	T. of Westport – SD #1	1972		Not Specified	Extended Aeration		Hypochlorite-Contact Tank
	T. of Westport – Wadhams SD	1988		Not Specified	Not Specified	Sand Filters (Not Specified)	
	T. of Willsboro			Not Specified	Rotating Biological Contractor		
Hamilton	T. of Indian Lake	1937	1971	Not Specified	Extended Aeration		
	T. of Speculator	1972	1996	Not Specified	Extended Aeration		
Warren	T. of Bolton	1860	1975	Imhoff Tank/ Doten Tank	Secondary Clarifier/ High Rate Trickling Filter	Recirculating Sand Filters/ Sand Filters (Not Specified)	
	C. of Glens Falls	1938	1987	Mechanically Cleaned Clarifier	Extended Aeration/ Conventional Activated Sludge/ Secondary Clarifier		
	T. of Hague			Not Specified	Sequencing Batch Reactor	Microfiltration (Cbuds)	
	V. of Lake George	1938	1965	Two Story (Clarigester)	Secondary Clarifier/ High Rate Trickling Filter		
	T. of Warrensburg	1993		Not Specified	Not Specified		
Washington	T. of Dresden – Huletts Landing SD #1	1981	1993	Settling Tank	Not Specified		
	V. of Fort Ann	1938	1988	Imhoff Trank/ Doten Tank	Not Specified		
	V. of Granville	1937	1976	Imhoff Trank/ Doten Tank	Secondary Clarifier/ High Rate Trickling Filter		
	V. of Greenwich	1986		Not Specified	Rotating Biological Contractor/ Secondary Clarifier		
	Washington County SD #2	1988		Settling Tank	Plug Flow Activated Sludge		
	V. of Whitehall	1979		Mechanically Cleaned Clarifier	Extended Aeration		Chlorine Gas-Backup System

Source: NYS Department of Environmental Conservation Bureau of Water Compliance data (accessed May 2021).

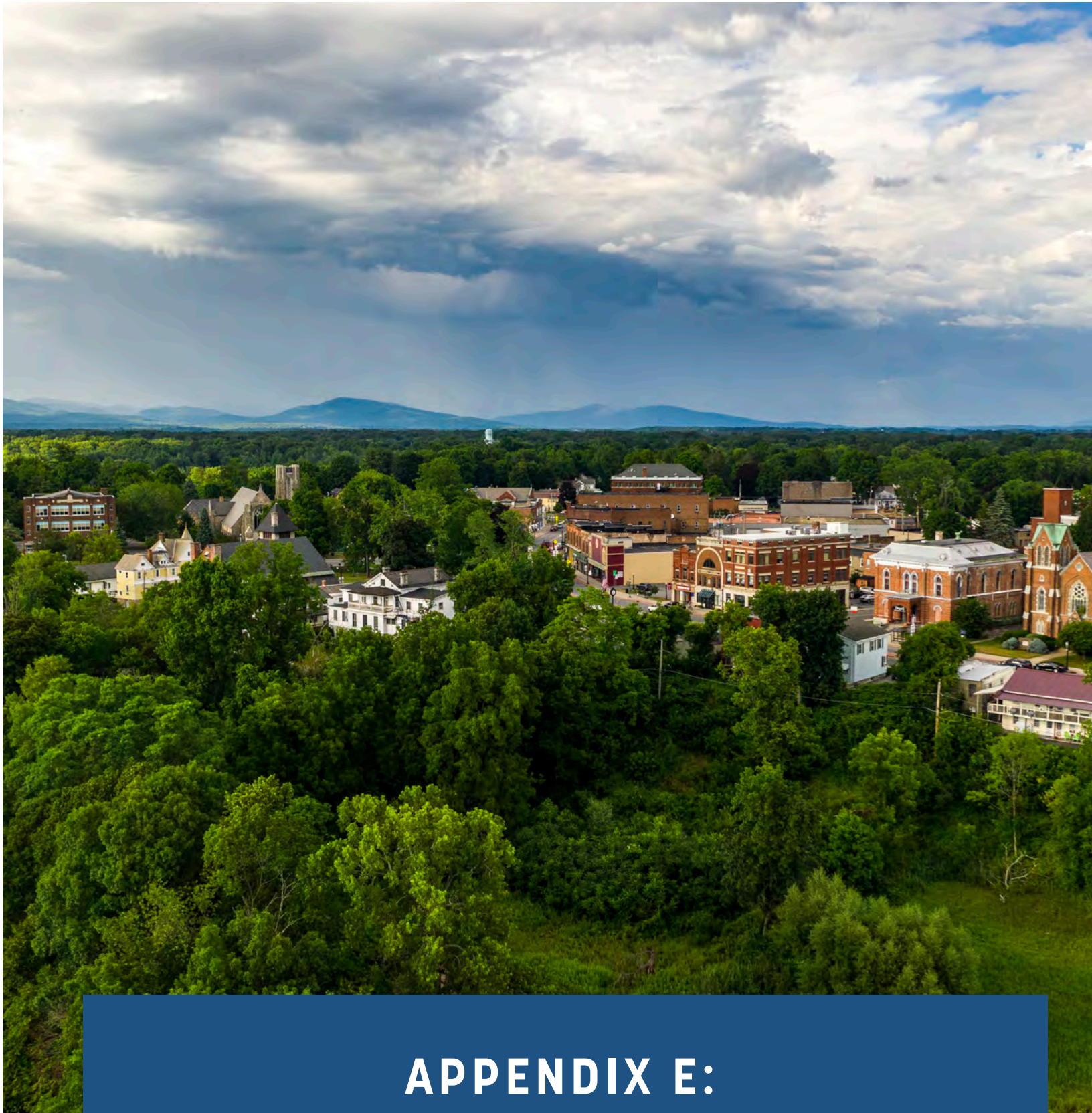
**Notes:**

Primary treatment = Removal of a portion of the suspended solids and organic matter from the wastewater.

Secondary treatment = Removal of biodegradable organic matter (in solution or suspension) and suspended solids. Disinfection is also typically included in the definition of conventional secondary treatment.

Tertiary treatment = Removal of residual suspended solids (after secondary treatment), usually by granular medium filters, cloth filters, or microscreens. Disinfection is also typically a party of tertiary treatment. Nutrient removal is often included in this definition.

Disinfection = The partial destruction and inactivation of disease-causing organisms from exposure to chemical agents (e.g., chlorine) or physical process (e.g., UV radiation).



# APPENDIX E: IMPLEMENTATION MATRIX

Appendix E: Implementation Matrix

Strategy	Partners	Timeline (Short-term/ST, Long-term/LT, Ongoing)	Cost	Metrics to Measure Success
<b>Connecting Our People</b>				
Develop a regional drinking water & wastewater needs assessment and strategy	<ul style="list-style-type: none"> <li>Local municipalities</li> <li>State agencies (NYSDEC, EFC, DOH)</li> </ul>	ST	\$	\$\$ allocated to water & wastewater projects, # of completed water & wastewater improvement projects
Develop a regional telecommunications plan & project development strategy	<ul style="list-style-type: none"> <li>Local municipalities</li> <li>APA</li> <li>State agencies (NYSESD)</li> <li>County officials &amp; ED groups</li> <li>Private sector companies</li> <li>ADK Action</li> </ul>	ST	\$	\$\$ allocated to broadband & cellular projects, square miles of broadband & cellular coverage added
Launch a pilot broadband deployment & small cell cellular project	<ul style="list-style-type: none"> <li>Local municipalities</li> <li>APA</li> <li>State agencies (NYSESD)</li> <li>County officials &amp; ED groups</li> <li>Private sector companies</li> </ul>	LT	\$\$	\$\$ allocated to the project, square miles of broadband & cellular coverage added
Identify areas where transportation hinders workplace participation & explore feasibility of new transportation options	<ul style="list-style-type: none"> <li>Regional Employers</li> <li>Transit agencies</li> </ul>	ST	\$	# of workers who commute by alternate means of transportation, additional miles of transit service
<b>Child Care Access</b>				
Recruit, train, and open more home-based child care	<ul style="list-style-type: none"> <li>CCRRs</li> <li>Chambers of Commerce</li> <li>Community Colleges</li> <li>Career Centers</li> <li>Private sector employees</li> <li>Early Care and Learning Council</li> </ul>	ST, Ongoing	\$\$	# of home-based child care providers
Establish a staffed family child care network	<ul style="list-style-type: none"> <li>CCRRs</li> <li>Early Care and learning council</li> </ul>	ST	\$\$	# of home child care providers in the network, increase in child care providers' revenue, decrease in closure rate
Support regional childcare advocates in their efforts to increase childcare provider revenue potential	<ul style="list-style-type: none"> <li>CCRRs</li> <li>ANCA</li> <li>Birth to 3 Alliance</li> <li>Early Care &amp; Learning Council</li> </ul>	Ongoing	\$	# of child care providers in the region, increase in child care providers' revenue
<b>Housing Access &amp; Stability</b>				
Establish a regional coordination group and champion for housing	<ul style="list-style-type: none"> <li>Adirondack Community Housing Trust</li> <li>NYS Homes and Community Renewal</li> <li>NCREDC &amp; CREDC</li> </ul>	ST, Ongoing	\$	# of initiatives that are advanced through regional coordinating group
Develop a regional housing assessment and strategy	<ul style="list-style-type: none"> <li>Adirondack Community Housing Trust</li> <li>Affordable Housing Accreditation Board</li> <li>National Association of housing and redevelopment officials</li> <li>State agencies (HCR)</li> <li>APA</li> <li>NCREDC &amp; CREDC</li> </ul>	ST	\$	funding secured for implementation activities, # of projects in the pipeline
Create a LCLG Regional Land Bank	<ul style="list-style-type: none"> <li>New York Land Bank Association</li> <li>New York State Empire State Development</li> </ul>	ST	\$	# of participating municipalities, # of properties improved and returned to use, decrease in housing vacancy



Appendix E: Implementation Matrix

	<ul style="list-style-type: none"> <li>Center for Community Progress</li> </ul>			
Develop a year-round modular housing factory and deploy modular housing units throughout the region	<ul style="list-style-type: none"> <li>Point Positive, Inc.</li> <li>Workforce Development Boards</li> <li>Community Colleges</li> </ul>	LT	\$\$\$	Increase in # of housing units in the region
Create and Deploy a Regional Housing Portal	<ul style="list-style-type: none"> <li>Housing authorities</li> <li>Real estate agencies</li> </ul>	LT	\$\$	# of housing units searchable online, # of portal users/visits
<b>Connect Main Streets &amp; Community Hubs</b>				
Connect Main Streets and community hubs	<ul style="list-style-type: none"> <li>BID &amp; Chambers</li> <li>Main Street Businesses of all sizes</li> <li>Property Owners/Developers</li> </ul>	ST	\$	Public funds invested into Main Street projects, private sector funds invested
Establish regional destination management planning working group	<ul style="list-style-type: none"> <li>ROOST</li> <li>Convention &amp; Visitor Bureaus</li> <li>Municipalities</li> <li>APA</li> <li>Private sector businesses</li> </ul>	ST	\$	# of initiatives that are advanced through regional destination management planning group
Match small businesses and startups with Main Street spaces	<ul style="list-style-type: none"> <li>IDAs/EDCs</li> <li>Local realtors/realtor associations</li> <li>Main Street building and property owners</li> <li>Local and Regional Chambers of Commerce</li> <li>Municipalities</li> </ul>	LT	\$	# of small businesses matched with spaces; # of businesses in the pipeline, # of small businesses open 2-years after 'match' is made
Main Street redevelopment site assessments	<ul style="list-style-type: none"> <li>IDAs/EDCs</li> <li>State agencies (NYSESD, NYSOCR, NYSDOS)</li> <li>Local realtors/realtor associations</li> <li>Local and Regional Chambers of Commerce</li> <li>Municipalities</li> <li>US EPA</li> </ul>	LT	\$\$	# of site assessments, # of projects initiated following assessment
Pursue BOA designation in relevant geographies	<ul style="list-style-type: none"> <li>NYSDOS</li> <li>Municipalities</li> <li>US EPA</li> </ul>	Ongoing	\$	# of active BOA projects being pursued
Downtown & Hamlet center streetscape revitalization	<ul style="list-style-type: none"> <li>NYSDOS</li> <li>Municipalities,</li> <li>Related MPOs, nonprofits (e.g., Smart Growth America)</li> <li>ADA advocates, etc.</li> </ul>	ongoing	\$\$	\$\$ of funding allocated for streetscapes
<b>Entrepreneurial Ecosystem Building</b>				
Reimagine Supply Chain Resilience through Entrepreneurship	<ul style="list-style-type: none"> <li>Regional EDOs</li> <li>Private sector businesses</li> <li>Entrepreneurs</li> </ul>	ST, Ongoing	\$	Number of startups working on supply chain related initiatives, Investment by anchor institutions into program
Host a regular event series focused on networking and support	<ul style="list-style-type: none"> <li>Regional EDOs</li> <li>Regional Coffee Shops/Cafes</li> <li>Coworking Spaces &amp; Libraries in the region</li> <li>Local entrepreneurs</li> <li>Kauffman Foundation</li> </ul>	Ongoing	\$\$	# of businesses/sites in pipeline to host event, # of events held, # of attendees to events, # of people reached virtually
Coordinate cohorts for regional small business training and support	<ul style="list-style-type: none"> <li>Local EDOs</li> </ul>	Ongoing	\$\$	# of participants in cohorts, # of training programs delivered



Appendix E: Implementation Matrix

	<ul style="list-style-type: none"> <li>Regional service providers</li> </ul>			
Hold a startup pitch competition	<ul style="list-style-type: none"> <li>Regional colleges and universities</li> <li>Local EDOs</li> <li>Entrepenuership Network Coordinator (future position)</li> </ul>	LT	\$\$	# of participants in competition, \$\$ of sponsorship raised
Ensure women, minorities, and veterans are accessing and engaging in the ecosystem	<ul style="list-style-type: none"> <li>US Small Business Administration Veterans Business Outreach Centers</li> <li>Upstate New York Black Chamber of Commerce</li> </ul>	ST	\$	# of calls with MWBE or veteran businesses, \$\$ of loans to MWBE or veteran businesses
<b>Career Building &amp; Training</b>				
Replicate "Career Jam" program across the region	<ul style="list-style-type: none"> <li>Workforce development boards</li> <li>Educational Institutions</li> <li>Private sector employers</li> </ul>	ST	\$\$	# of educational institutions as participants, # of private sector employer participants, # of industries represented, # of attendees
Advocate for BOCES skill-building in place of study hall	<ul style="list-style-type: none"> <li>Workforce development boards</li> <li>BOCES</li> <li>Educational Institutions</li> </ul>	LT	\$	# of students participating in program
Tailor BRE survey questions for real-time labor market information	<ul style="list-style-type: none"> <li>Workforce development boards</li> <li>Post-secondary educational institutions</li> </ul>	ST	\$	# of BRE surveys completed annually
Support efforts/fund potential to upskill existing workers, especially in high tech fields	<ul style="list-style-type: none"> <li>Workforce development boards</li> <li>Post-secondary educational institutions</li> </ul>	Ongoing	\$\$	# of workers placed in high tech fields, \$\$ allocated to upskill training
<b>Additional Actions</b>				
Conduct a regional economic diversification assessment	<ul style="list-style-type: none"> <li>NYSED</li> <li>NCREDC &amp; CREDC</li> <li>Chambers of Commerce</li> </ul>	ST	\$	Increase in region's economic diversity, increase in year-round employment
Re-Envision the Forest Industry	<ul style="list-style-type: none"> <li>Warren County EDC</li> <li>501CTHREE</li> <li>NYSED</li> <li>Post-secondary educational institutions</li> <li>Private sector companies</li> </ul>	LT	\$\$\$	Paper and pulp industry GRP
Increase coordination and collaboration within the medical device & life science sector	<ul style="list-style-type: none"> <li>Chambers of Commerce</li> </ul>	ST, Ongoing	\$	Medical device and life science industry's GRP
Support and replicate existing mobile healthcare providers	<ul style="list-style-type: none"> <li>Health care providers</li> </ul>	ST	\$\$	# of mobile health care clinics, # of patients seen at mobile health care clinics, decrease in residents' average travel time to health care
Explore developing a rural health care housing program	<ul style="list-style-type: none"> <li>Health care providers</li> </ul>	LT	\$\$	# of doctors and medical professionals in the region
Establish a regional agricultural hub	<ul style="list-style-type: none"> <li>Cornell Cooperative Extension</li> <li>Land conservation organizations</li> <li>Agriculture businesses</li> <li>Food Pantries</li> <li>Local colleges &amp; universities</li> <li>Hudson Valley Agribusiness Development Corporation</li> </ul>	ST	\$\$	# of Hubs established, Agricultural sector GRP
Explore mobile meat processing facilities	<ul style="list-style-type: none"> <li>Niche meat processor assistance network</li> <li>Cornell Cooperative Extension</li> </ul>	LT	\$\$	# of meat processing facilities in the region, decrease in export of meat processing services
Highlight the value of the US/Canadian Border to the regional economy	<ul style="list-style-type: none"> <li>North Country Chamber of Commerce</li> <li>NCREDC and CREDC</li> <li>IDAs</li> <li>EDCs</li> </ul>	Ongoing	\$	Funds devoted to facilitate trade, Increase in US-Canadian trade, increase in Canadian tourism spending

Appendix E: Implementation Matrix

	<ul style="list-style-type: none"> <li>• Quebec-New York Corridor Coalition</li> </ul>			
Showcase the Region as a Leader in Climate Protection	<ul style="list-style-type: none"> <li>• ROOST</li> <li>• EDCs</li> <li>• County &amp; Local Tourism Departments</li> </ul>	Ongoing	\$	# of designated climate smart communities, # of articles featuring regional environmental initiatives
Continue LCLGRP's role as the region's coordinating economic development organization	<ul style="list-style-type: none"> <li>• Municipalities</li> <li>• Economic development partners</li> <li>• REDCs</li> <li>• State agencies</li> </ul>	Ongoing	\$	# of visits to LCLGRP's website, # of plan recommendations implemented, # of projects awarded grant funding, \$\$ grant funding and loans distributed in the region