



2022-2027 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

PREPARED BY



LAKE CHAMPLAIN-LAKE GEORGE

**REGIONAL
PLANNING**

ECONOMIC DEVELOPMENT DISTRICT

2023 Update

Contents

| | |
|--|-----|
| Executive Summary | i |
| Overview | ii |
| District Profile | iii |
| SWOT Analysis | iv |
| Strategic Priorities | v |
| Introduction | 1 |
| About the LCLGRP | 1 |
| What is a CEDS? | 1 |
| Why Develop a CEDS? | 2 |
| Economic Resilience | 2 |
| The Lake Champlain – Lake George Region | 3 |
| Regional Characteristics | 4 |
| Industry Analysis | 11 |
| Economic Resilience | 15 |
| SWOT Analysis | 17 |
| Strategic Direction | 19 |
| Action Plan | 23 |
| Completed Actions | 55 |
| 2022 Funding Awards | 57 |
| Evaluation Framework | 63 |
| CEDS Evaluation Metrics | 64 |
| Conclusion | 67 |
| | |
| Appendix A: Regional Summary Background | A-1 |
| Appendix B: CEDS Strategy Committee Meetings | B-1 |
| Appendix C: SWOT Analysis Results | C-1 |
| Appendix D: Forward Together: Economic Resiliency Plan | D-1 |

Acknowledgments

CEDS STRATEGY COMMITTEE

| | |
|-------------------|---|
| Susan Matton | North Country Chamber of Commerce |
| Anna Reynolds | Essex County Community Resources |
| Christy Wilt | Hamilton County Economic Development |
| Ethan Gaddy, AICP | Warren County Planning & Community Development |
| Laura Oswald | Washington County Planning & Economic Development |

LAKE CHAMPLAIN – LAKE GEORGE REGIONAL PLANNING BOARD

Economic Development District Staff

| | |
|------------------------------|----------------------------------|
| Beth Gilles | Executive Director |
| Chris Belden, AICP | Economic Development Coordinator |
| Allison Hargrave-Gaddy, AICP | Senior Planner |
| Samuel Blake | Junior Planner |

This document has been prepared by the Lake Champlain – Lake George Regional Planning Board in collaboration with its member agencies, partnership organizations, and local stakeholders.

The CEDS document was prepared using federal funds under award ED19PHI3020015 from, and in cooperation with, the U.S. Economic Development Administration, U.S. Department of Commerce.

The statements, findings, recommendations are those of the author(s) and do not necessarily reflect the views of the U.S. Economic Development Administration or the U.S. Department of Commerce.

Photo Credits:

Regional Office of Sustainable Tourism (ROOST)

North Country Chamber of Commerce (NCCC)



LAKE CHAMPLAIN-LAKE GEORGE

**REGIONAL
PLANNING**



Executive Summary

For 55 years, the Lake Champlain – Lake George Regional Planning Board (LCLGRP) has assisted communities with planning and implementation of strategic priorities that improve the economic well-being of the Lake Champlain – Lake George Region, which consists of Clinton, Essex, Hamilton, Warren, and Washington Counties of New York State.

The 2022-2027 Comprehensive Economic Development Strategy (CEDS) sets the foundation for future collaborative implementation of regional strategic priorities.

The feedback received from over 100 local and regional stakeholders has informed the strategic direction for the LCLGRP to undertake over the next five years.

A review of socioeconomic conditions in the region shows vulnerabilities but numerous opportunities to support greater economic growth in the LCLG Region. The LCLGRP and CEDS Strategy Committee has identified six goals with accompanying strategic approaches and priority actions. These goals include improving infrastructure, quality of life, collaboration, business development, workforce readiness, and preservation of natural resources.

The strategic approaches and priority actions identified in the CEDS provide the LCLGRP and partner economic development organizations with a roadmap for future economic improvement. The Regional Planning Board will promote the implementation of these recommendations through the formation of a new Regional Economic Partnership (REP). The REP will also help inform future updates to the CEDS and assist with the monitoring of economic conditions.



Message from the Director

“At the Regional Planning Board, 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.

The lesson learned from the economic downturn caused by the COVID-19 pandemic, is that positive results happen because of concerted collaboration between stakeholders.

Building on this experience, the LCLGRP has adopted a new “forward together” approach to regional economic development, which is reflected in the 2022-2027 CEDS.”

-Beth Gilles, Executive Director
Lake Champlain – Lake George Regional Planning



OVERVIEW

LCLGRP is designated by the U.S. Department of Commerce Economic Development Administration (EDA) to work on economic development efforts in Clinton, Essex, Hamilton, Warren, and Washington Counties. LCLGRP advocates for, supports, and coordinates regionally significant economic development activities in the region.

This regional CEDS will benefit the Lake Champlain – Lake George Region in two primary ways:

1. The CEDS highlights key priorities for the region in the next five years.
2. The CEDS identifies strategic priorities that have regional significance.

SPOTLIGHT ON ECONOMIC RESILIENCE

What is Economic Resilience?

- The ability to recover quickly from a disruption
- The ability to withstand a disruption
- The ability to avoid the disruption altogether

The challenges we've confronted in 2020 and 2021 have prompted rapid change and adaptation. Resilience is woven throughout the CEDS in the hopes that the next time we face wide-ranging shocks like those experienced during the pandemic, we'll have better tools and networks for avoiding, withstanding, and quickly recovering from disruption.

Six economic resiliency principles have guided decisions about LCLGRP's 2022 CEDS strategic priorities, implementation structure, and performance indicators.

IMPERATIVES FOR ECONOMIC RESILIENCE

| | | | |
|--|----------------------------|--|--|
| | Connecting our People | | Main Streets & Community Centers as Economic Engines |
| | Child Care Access | | Entrepreneurial Ecosystem Building |
| | Housing Access & Stability | | Career Building & Skills Training |

What is a CEDS?

The Comprehensive Economic Development Strategy (CEDS) contributes to effective economic development in America's communities and regions through a locally-based, regionally-driven economic development process.



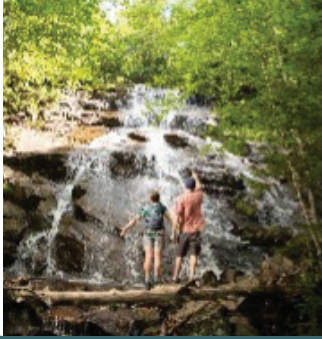

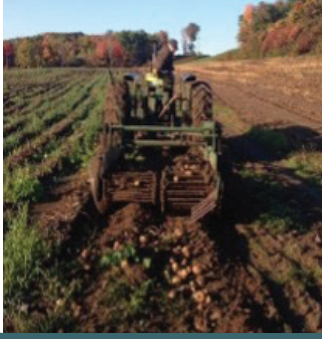
The CEDS provides the capacity-building foundation by which the public sector, working in conjunction with other economic actors (individuals, firms, industries), creates the environment for regional economic prosperity.

-U.S. Economic Development Administration

The LCLG Region is comprised of five counties, Clinton, Essex, Hamilton, Warren, and Washington. Although the region has several small urban centers, the region is predominantly rural with low population density. The area was originally settled to take advantage of the region's timber and mineral resources. While these industries remain important to the region, government services, health care, tourism, and manufacturing are the region's top industries.

| | | | |
|---|----------------|------------------------------|--------------|
| Employment by Sector (All Counties 2019) | 21% | 14% | 13% |
| | Government | Healthcare/Social Assistance | Retail Trade |
| | 11% | 9% | 5% |
| | Food & Lodging | Manufacturing | Construction |

Source: Emsi

| | | | |
|---|---------------------------------|---|----------------------------------|
| Clinton County | | Essex County | |
| Population | 79,843 | Population | 37,381 |
| Pop. Density | 76.5/sq mi | Pop. Density | 20.8/sq mi (2nd lowest, NYS) |
| Median Age | 39.5 years | Median Age | 47.7 years (4th highest, NYS) |
| Med. HH Income | \$56,365 | Med. HH Income | \$56,763 |
|  | |  | |
| Hamilton County | | Warren County | |
| Population | 5,107 | Population | 65,737 |
| Pop. Density | 3.0/sq mi (#1 lowest, NYS) | Pop. Density | 75.6/sq mi |
| Median Age | 55.3 years (#1 highest, NYS) | Median Age | 46.8 years (5th highest, NYS) |
| Med. HH Income | \$58,675 | Med. HH Income | \$61,024 |
|  | |  | |
| Washington County | | Lake Champlain – Lake George Region (LCLGRP-EDD) | |
| Population | 61,302 | Population | 249,370 |
| Pop. Density | 73.4/sq mi | Pop. Density | 39.8/sq mi |
| Median Age | 44.2 years | Median Age | 46.7 |
| Med. HH Income | \$57,258 | Med. HH Income | \$58,017 |
|  | |  | |

Source: 2020 Decennial Census and 2019 American Community Survey, U.S. Census Bureau

SWOT ANALYSIS

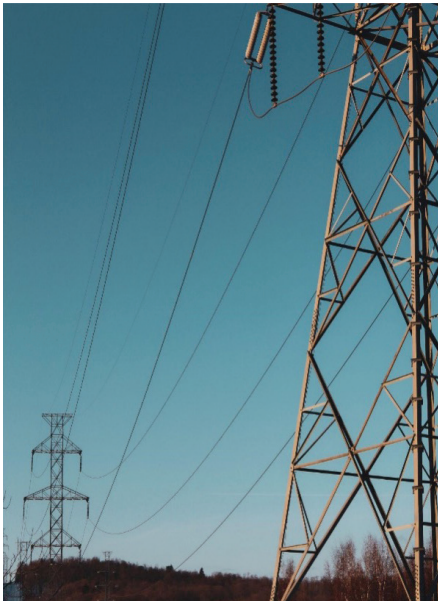
| Strengths | Weaknesses | Opportunities | Threats |
|--|--|--|--|
| <p>Quality of Life & Communities</p>  | <p>Housing Options</p>  | <p>Federal, State & Local Grants</p>  | <p>Lack of Housing Options</p>  |
| <p>Recreational Resources</p>  | <p>Broadband/Cell Coverage</p>  | <p>Improvement of Infrastructure</p>  | <p>Lack of Well-Paying Job</p>  |
| <p>Environment & Natural Resources</p>  | <p>Job Opportunities</p>  | <p>Downtown & Hamlet Revitalization</p>  | <p>Energy Prices</p>  |
| <p>Tourism</p>  | <p>Childcare/Eldercare Options</p>  | <p>Preserve Environmental Resources</p>  | <p>Lack of Business Incentives</p>  |
| <p>Education & Schools</p>  | <p>Transportation Options</p>  | <p>Attraction of Young Professionals & Families</p>  | <p>Lack of Tech. Assistance for Small Businesses</p>  |
| <p>Public Safety</p>  | <p>Regulations</p>  | <p>Greater Intermunicipal Cooperation</p>  | <p>Future Closure of the Canadian Border</p>  |
| <p>Access to Canadian Border</p>  | <p>Business Climate/Incentives</p>  | <p>More Housing Options</p>  | <p>Public Health Emergencies</p>  |

STRATEGIC PRIORITIES

| | | |
|---------------|--|---|
| Vision | The LCLGRP Region enjoys a lively entrepreneurial and business development sector that provides first-rate employment opportunities for its dynamic workforce who enjoy a high quality of life with stunning natural resources, world-class recreational opportunities, and vibrant community centers served by modern infrastructure. | |
| Goals | 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities |
| | 2 | Enhance Quality of Life and Support Vibrant Community Centers |
| | 3 | Promote Regional Collaboration & Outreach |
| | 4 | Support Entrepreneurship & Business Development Opportunities |
| | 5 | Improve Workforce Readiness |
| | 6 | Preserve Natural Resources & Expand Recreational Opportunities |

- Each goal contains several strategic approaches and priority actions for implementation.
- Economic development practitioners and their partners, with support from LCLGRP staff, will implement the CEDS – implementation will be a collaborative effort across multiple organizations.
- It is not expected that economic development practitioners will pursue all the ideas captured in the CEDS.
- Instead, economic development practitioners and their partners should work together with the LCLGRP to identify which approaches they want to pursue based on the assets and strengths they can contribute, through forums like the Regional Economic Partnership.

DEVELOP & MODERNIZE REGIONAL INFRASTRUCTURE TO PROMOTE EQUITABLE ECONOMIC OPPORTUNITIES



DESCRIPTION: Infrastructure projects, particularly large and those of regional importance, often exceed the capacity and technical expertise of local municipalities. Often, these projects involve multiple participants, public-private partnerships, complex regulatory systems, and strategic stakeholder engagement. To achieve necessary infrastructure improvements more effectively in the region, technical support will be required.

LCLGRPB'S ROLE: The LCLGRPB will track infrastructure needs across the region, provide technical assistance, and connect specific projects with financial resources.

STRATEGIES:

- 1.1. Identify needs and address water and sewer system affordability and sustainability
- 1.2. Assist local governments access funding for regionally significant municipal drinking water and wastewater improvements
- 1.3. Eliminate barriers to improve access to broadband and telecommunications services
- 1.4. Develop solutions to rural, inter-community transportation for residents, local workforce, and visitors
- 1.5. Support the development of initiatives that reduce the disposal of organic waste materials (food scraps) and expand markets for recyclable materials
- 1.6. Support greater utilization of renewable energy and building weatherization by local governments, residents, and businesses to reduce energy costs and combat climate change
- 1.7. Prepare the region for greater utilization of electric vehicles (EV) through the installation of EV charging infrastructure
- 1.8. Support infrastructure to support shovel-ready industrial and commercial development areas

KEY PARTNERS:

- County and local governments
- Economic development organizations
- Adirondack/Glens Falls Transportation Council (A/GFTC)

INDICATORS:

- Funding awards for water, sewer, or broadband
- Percent broadband coverage
- Number of EV charging stations

ENHANCE QUALITY OF LIFE & SUPPORT VIBRANT COMMUNITY CENTERS



DESCRIPTION: The region's top attribute is the high quality of life. Maintaining vibrant, safe, and welcoming communities will be crucial to retaining and adding to the region's population. Lack of basic services, like child care, can make rural areas less attractive to prospective residents and employers. Ensuring equitable access to basic services for residents and businesses in our communities is a critical strategic opportunity.

LCLGRP'S ROLE: The LCLGRP will leverage staff resources to assist communities with research, planning, and implementation of key priorities.

STRATEGIES:

- 2.1. Strengthen downtowns and community centers that serve as anchors for regional economic activity
- 2.2. Create economic opportunity through improved access to child care
- 2.3. Support development of diverse and affordable housing options
- 2.4. Support the provision of rural health care services
- 2.5. Support access to local food and value-added agricultural products
- 2.6. Improve economic opportunities and address barriers affecting traditionally underrepresented residents, including Black, Indigenous, & People of Color (BIPOC), LGBTQA+, disabled, women, veterans, and low/moderate income residents
- 2.7. Identify regional solutions to address sustainable emergency services staffing in rural areas
- 2.8. Expand opportunities for brownfield redevelopment, infill development, and adaptive reuse

KEY PARTNERS:

- County and local governments
- Chambers of Commerce
- Economic development organizations
- Diversity and inclusion groups

INDICATORS:

- Population change
- Number of occupied housing units
- Median household income
- Racial and ethnic composition
- Poverty rate

PROMOTE REGIONAL COLLABORATION



DESCRIPTION: The challenges confronting the LCLG Region are too great for any single organization to resolve. Instead, a regional economic development strategy is most effective when it considers and incorporates the interests and strengths of all stakeholders in the region.

LCLGRP'S ROLE: The LCLGRP serves as the region's only Economic Development District (EDD), which increases the region's ability to access federal funding. Over the next five years, the LCLGRP will implement its new regional economic development framework to improve cohesion and collaboration between regional stakeholders.

STRATEGIES:

- 3.1. Continue the LCLGRPB's role as the regional coordinating economic development organization
- 3.2. Coordinate with stakeholders to address regional housing challenges
- 3.3. Implement regional economic development framework
- 3.4. Improve access to technical assistance and training for local government officials
- 3.5. Improve engagement with the Adirondack/Glens Falls Transportation Council (A/GFTC), the Metropolitan Planning Organization (MPO) for Warren and Washington Counties
- 3.6. Implement a "hub and spoke" model between the EDD and local economic development organizations and chambers of commerce for improved communication, data sharing, and program delivery
- 3.7. Foster collaboration between high schools, community colleges, career and technical education (CTE) groups, workforce development boards, and industries
- 3.8. Provide regular updates to regional stakeholders about regional economic indicators, through use of newsletters and other communications

KEY PARTNERS:

- County and local governments
- Economic development organizations
- Career and technical education (CTE) groups
- Workforce development boards
- Adirondack/Glens Falls Transportation Council

INDICATORS:

- Number of stakeholder meetings hosted
- Number of stakeholder meeting attended

SUPPORT ENTREPRENEURSHIP & BUSINESS DEVELOPMENT OPPORTUNITIES



DESCRIPTION: Fostering opportunities to retain, expand, and attract business development throughout the region will be critical to improving access to well-paying job opportunities, driving innovation, and growing private investment in communities.

LCLGRP'S ROLE: The LCLGRP will utilize resources, such as the new Forward Together: Business Retention and Expansion Program and its small business loan programs to improve access to business development resources. The LCLGRP will work with key partners to expand awareness of technical assistance, training, and business development resources.

STRATEGIES:

- 4.1. Promote small business activity in community centers
- 4.2. Support business development assistance, including business succession planning and 1:1 business counseling
- 4.3. Ensure women, minorities, and veterans are accessing and engaging in the ecosystem
- 4.4. Promote agribusiness and local food industries as a growth area for applicable parts of the region and to adapt to changes in the agricultural product supply chain
- 4.5. Strengthen existing industry clusters and develop emerging clusters within the region
- 4.6. Highlight the value of the U.S. - Canadian border to the regional economy
- 4.7. Grow awareness and utilization of financial assistance resources available to businesses
- 4.8. Implement Forward Together Business Retention and Expansion Program
- 4.9. Collaborate with local and regional tourism stakeholders to improve tourist experiences in the region
- 4.10. Monitor the introduction of New York State Regulated Cannabis Industry, its economic impacts and opportunities

KEY PARTNERS:

- County and local governments
- Economic development organizations
- Chambers of Commerce
- Cornell Cooperative Extensions
- Workforce development boards
- Diversity and inclusion groups

INDICATORS:

- Number of businesses engaged
- Number of small business loans issued
- M/WBE and SDVOB certifications

IMPROVE WORKFORCE READINESS



DESCRIPTION: As technologies and industries change over time, ensuring the region's workforce is prepared for tomorrow's economy will grow opportunities for well-paying career opportunities.

LCLGRP'S ROLE: The LCLGRP will work with key stakeholders to improve the attraction and retention of the region's workforce.

STRATEGIES:

- 5.1. Improve career readiness of high school graduates
- 5.2. Support improvements at regional higher education facilities that improve access to learning
- 5.3. Explore transportation options for improving mobility to workplaces
- 5.4. Support training opportunities to upskill the incumbent workforce

KEY PARTNERS:

- County and local governments
- Economic development organizations
- Chambers of Commerce
- Career and technical education (CTE) groups
- Workforce development boards
- Cornell Cooperative Extensions
- Diversity and inclusion groups

INDICATORS:

- Labor force participation rate
- Unemployment rate
- Student enrollment
- High School graduation rates
- Economically disadvantaged student enrollment
- Economically disadvantaged student graduation %
- Educational attainment

PRESERVE NATURAL RESOURCES & EXPAND RECREATIONAL OPPORTUNITIES



DESCRIPTION: The protection of environmental resources and the expansion of recreational amenities provide visitors and residents with unremarkable experiences. The region's tourism industry provides over \$16 billion annually, in direct and indirect economic benefits. Additionally, much of the region is within the 6-million-acre Adirondack Park, which serves as a global carbon sink in the fight against global climate change.

LCLGRPB'S ROLE: The LCLGRPB will continue to leverage its technical resources and partners to advance strategies that improve environmental and recreational resources.

STRATEGIES:

- 6.1. Showcase the region as a leader in climate protection
- 6.2. Continue to maintain high water quality in area waterbodies
- 6.3. Protect prime farmland from urban sprawl and promote the growth of agritourism to support access to local products and improve economic opportunities for local agricultural businesses
- 6.4. Improve hazard mitigation and climate resiliency
- 6.5. Support the development of multi-use trails and supportive infrastructure for existing outdoor recreation facilities
- 6.6. Support projects and programs that enhance access and functionality of local waterfronts
- 6.7. Advocate for the provision of adequate staff resources to manage regional recreation amenities
- 6.8. Support sustainable growth of regional tourism attractions and amenities

KEY PARTNERS:

- County and local governments
- Economic development organizations
- Chambers of Commerce
- Environmental organizations
- Cornell Cooperative Extensions

INDICATORS:

- Acres of farmland conserved
- Acres of forestland conserved

Introduction

What is an EDD?

Economic Development Districts (EDDs) are multi-jurisdictional entities, commonly composed of multiple counties and in certain cases even cross-state borders. They help lead the locally-based, regionally driven economic development planning process that leverages the involvement of the public, private and non-profit sectors to establish a strategic blueprint for regional collaboration.

- U.S. Economic Development Administration

The Lake Champlain – Lake George Regional Planning Board (LCLGRP) has facilitated the development of the Comprehensive Economic Development Strategy (CEDS) for the LCLGRP Economic Development District (EDD), which includes the counties of Clinton, Essex, Hamilton, Warren, and Washington in New York State. This document is intended to serve as a blueprint for the future economic development of the region and provide strategies for guiding community growth. Regional partners have collaborated to identify strengths and assets, new opportunities, and needs and risks to develop this plan to move our region forward, increase quality of life, and prepare for growth with measurable goals and objectives.

ABOUT THE LCLGRP

The Lake Champlain – Lake George Regional Planning Board was established in 1967 and is among nine regional planning and development organizations operating in New York State under Article 12-B, Section 239h of the General Municipal Law. The LCLGRP has been designated by the U.S. Department of Commerce Economic Development Administration (EDA) to serve as the Economic Development District for Clinton, Essex, Hamilton, Warren, and Washington Counties in the northeast corner of New York State.

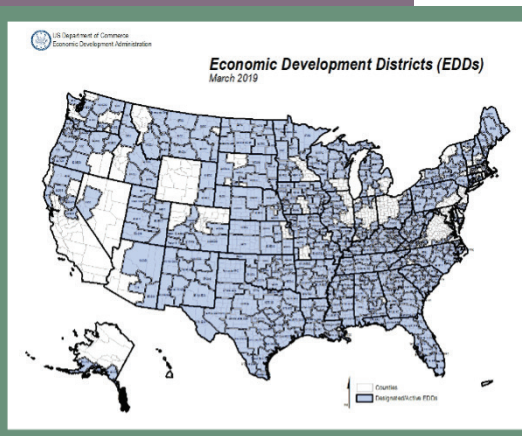
LCLGRP is overseen by a 30-member board and five-member executive committee. LCLGRP assists communities with community planning, water quality improvement projects, grant writing and administration, and implementation of regional/local economic development priorities.

The LCLGRP consists of five staff members, which include an Executive Director, Economic Development Coordinator, Senior Planner, Junior Planner, and Administrative Assistant.

WHAT IS A CEDS?

The LCLGRP is designated by the U.S. Department of Commerce Economic Development Administration to work on economic development efforts in its five-county region. LCLGRP advocates for, supports, and coordinates regionally significant economic development activities. The LCLGRP and their economic development partners serve a lead role in defining regional community and economic development issues, opportunities, vision, goals, and work programs.

A Comprehensive Economic Development Strategy is a regional action plan, prepared for the U.S. Economic Development Administration, that serves as the area's blueprint for future regional collaboration and Federal investment. While the report is prepared for the U.S. EDA, it is recommended that EDD's include strategies and priorities that integrate or leverage other regional planning efforts, including use of other available federal funds, private sector resources, and state support that can advance a region's goals and objectives.



The EDA requires that EDD's update their CEDS every five years pursuant to 13 C.F.R. §303.6(3)(ii). This plan is an update to the 2016-2021 CEDS. It sets the vision and strategy for the next five-year implementation cycle.

The development and maintenance of the CEDS is required to qualify for EDA assistance under its public works, economic adjustment, and planning assistance programs, and is a prerequisite for designation by the EDA as an EDD.

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) PROCESS



WHY DEVELOP A CEDS?

The CEDS will benefit the LCLG Region in three primary ways:

1. EDA identifies that locally-driven, regional economic development efforts generate the greatest return on investment for communities. Regions with active EDD's, like LCLGRP, offer the greatest opportunity for encouraging private investment and driving federal and state funding into the region.
2. The CEDS highlights strategies for the region to address over the next five years. By pooling resources and fostering collaboration, regional organizations can make progress toward achieving a region's economic vision and goals.
3. The CEDS identifies strategic priority actions that have regional significance. Communities seeking to advance projects in these identified areas can use the CEDS to demonstrate that their projects have been identified as a regional priority.

ECONOMIC RESILIENCE

The capacity of a region to prevent, withstand, and quickly recover from major disruptions (e.g., financial recessions, natural disasters) to its economic base is becoming increasingly apparent to supporting regional economic prosperity.

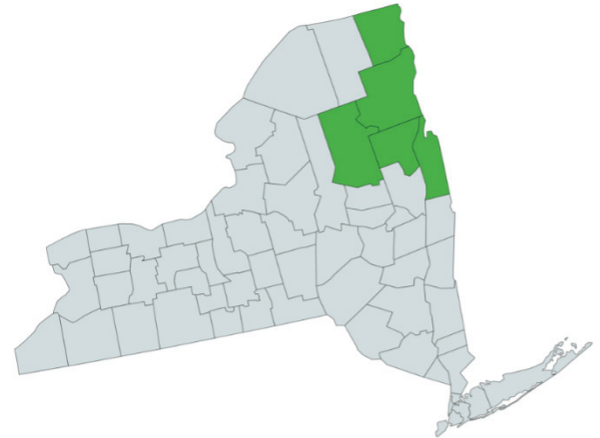
Following the economic downturn resulting from the COVID-19 pandemic, the LCLGRP was awarded funding from the U.S. Economic Development Administration (EDA) to study the impacts of the pandemic on the LCLG Region and develop strategies for improving the region's economic resiliency to future economic downturns.

Released in October 2021, the Forward Together: Economic Resiliency Plan identifies six economic imperatives to securing the region's economic resiliency, which include:

1. Connecting Our People
2. Child Care Access
3. Housing Access & Stability
4. Main Street & Community Centers as Economic Engines
5. Entrepreneurial Ecosystem Building
6. Career Building & Skills Training

The Lake Champlain – Lake George Region

The LCLG Region consists of five counties in northeastern New York (Clinton, Essex, Hamilton, Warren, and Washington). The region shares its 160-mile eastern border with the State of Vermont, 60% of which is comprised of Lake Champlain – the nation’s 6th largest lake. The northernmost county, Clinton, shares a 33-mile border with Canada. The proximity to the Canadian Border offers the region significant cross-border business opportunities. During the last Canadian Census (2016), the two bordering provinces of Ontario and Quebec account for approximately 61.5% of the total Canadian population, which has traditionally benefitted the region’s tourism industry. As a result of the COVID-19 pandemic, the US/Canadian Border remained closed to most travel for 20 months, which prohibited cross-border travel by Canadian residents. The region is adjacent to the following New York State counties, Franklin, St. Lawrence, Lewis, Herkimer, Saratoga, Rensselaer, and Fulton.



The region is predominantly rural, with population centers around the City of Plattsburgh (Clinton County) and the City of Glens Falls (Warren County). The region consists of one Metropolitan Statistical Area (MSA) – Glens Falls MSA, which consists of Warren and Washington Counties, and the Town of Moreau (Saratoga County).

Municipal Profile

| County | Towns | Villages | Cities | Total |
|--------------|-----------|-----------|----------|-----------|
| Clinton | 14 | 3 | 1 | 18 |
| Essex | 18 | 1 | 0 | 19 |
| Hamilton | 9 | 1 | 0 | 10 |
| Warren | 11 | 1 | 1 | 13 |
| Washington | 17 | 8 | 0 | 25 |
| Total | 69 | 14 | 2 | 85 |

Source: NYS Comptroller

Other Entities

| County | Business Improvement District | Industrial Development Agencies | Local Development Corps. | BOCES | Community Colleges |
|--------------|-------------------------------|---------------------------------|--------------------------|----------|--------------------|
| Clinton | 0 | 1 | 5 | 1 | 1 |
| Essex | 0 | 1 | 2 | 0 | 1 |
| Hamilton | 0 | 1 | 0 | 1 | 0 |
| Warren | 1 | 1* | 8 | 0 | 1 |
| Washington | 0 | 1* | 3 | 1 | 0 |
| Total | 1 | 5 | 18 | 3 | 3 |

Source: NYS Comptroller

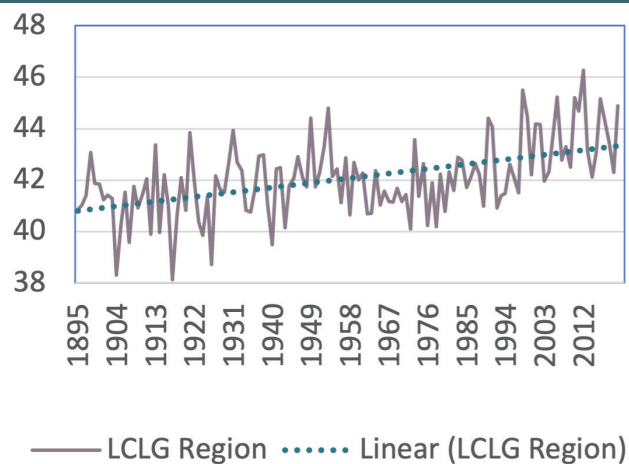
*Warren and Washington Counties share an Industrial Development Agency

CLIMATE

The LCLG Region has a temperate climate with considerable differences between summer highs and winter lows. The region has an average annual temperature of 42.4°F. However, since 1895, the average annual temperature trend in the LCLG Region has increased by 2.5°F – which is consistent with statewide trendsⁱⁱ. Rising temperatures in the region carry the potential to cause environmental, social, and economic disruptions. Unfettered rises in greenhouse gas emissions will lead to increased occurrences of heat waves and increased periods above freezing (32°F) during winter months.

Increasing temperatures is causing some in the winter recreation industry to begin to sound the alarm about the impact of global climate change in the region. Research published in *Global Environmental Change*ⁱⁱⁱ, included Gore Mountain Ski Center (Town of Johnsbury – Warren County). The study concludes that the region will likely experience shortened ski and snowmobile seasons, which would have significant impacts to these regional industries.

Average Annual Temperature, 1895-2020

Under RCP8.5,
by the Year...Season
Shortened by...

2050

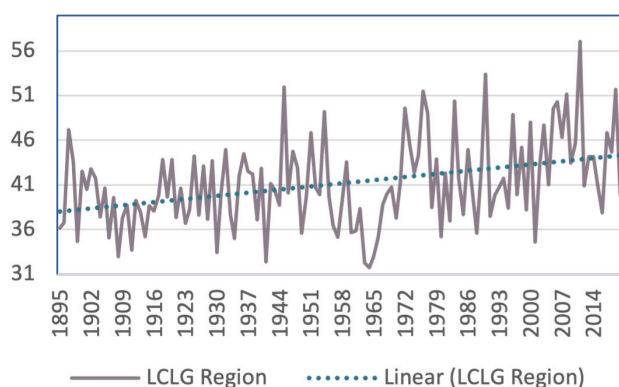
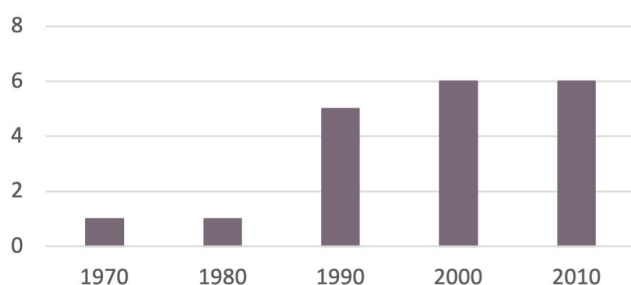
50-60%

2090

80-90%

Source: *Global Environmental Change*

Average Annual Precipitation, 1895-2020

Frequency of Presidential
Disaster Declarations, 1970-2020

Like temperatures, average annual precipitation in the LCLG Region have steadily increased. The average annual precipitation trend shows an increase of 6-inches of precipitation since 1895^{iv}. The increases in precipitation are accompanied by changes in rainfall patterns, which during the last few decades has shifted to short duration, high intensity rainfall event. Existing road, bridge, and stormwater infrastructure in the LCLG Region are not designed to be resilient to these events. To avoid the loss of property and life, efforts should be taken to make existing infrastructure more resilient to the impacts of climate change.

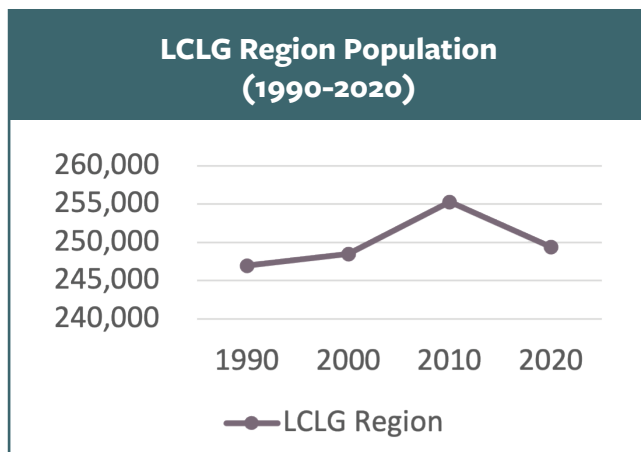
According to the Federal Emergency Management Agency (FEMA), 19 Presidential Disaster Declarations have been issued in the LCLG Region, since 1976 (not including the COVID-19 pandemic disaster declaration). Of them, 60% have been declared in the past 20 years^v.

ENVIRONMENT

Among the region's top attributes is the environment due to the high quality of freshwater resources, fertile soils, and pristine wilderness areas. Additionally, the region includes the 46 tallest mountain peaks in New York State, as part of the Adirondack Mountain Range, which includes the tallest, Mount Marcy (elevation 5,343 feet).

A principal factor in the preservation of environmentally sensitive areas in the Adirondacks is the Adirondack Park Land Use Act. The Act is responsible for the formation of the Adirondack Park Agency (APA). In addition to local land-use controls, the Adirondack Park Agency (APA) regulates private land use within the six-million-acre Adirondack Park. The APA has six land-use classifications for private land use that permit different uses and intensities.

Approximately, 48% of the land in the Adirondack Park is publicly owned versus 46% under private ownership^{vi}. Like land under private ownership, State-owned land in the Adirondack Park has different use restrictions to prevent ecological degradation.



POPULATION^{vii}

The LCLG Region experienced a dramatic 2% population decline within the past decade, a loss of 5,887 residents, which is greater than the current population of Hamilton County (5,107). The dramatic loss in population (between 2010-2020), follows a surge of population growth that occurred between 2000-2010, adding 6,788 new residents, at that time. While the results of the 2020 Census are significant, the population of the region has remained relatively the same, incrementally growing over the past 20 to 30 years, adding population by 0.4% and 1%, respectively.

The regional population trend (-2%) is significantly lower than that of New York State, which gained 4%, and the United States, which gained 8% in the last decade.

On a sub-regional basis, population losses were experienced in Clinton County (-3%), Essex County (-5%), and Washington County (-3%). Whereas, Hamilton County added 6% to its population and Warren County added only 37 residents.

AGE^{viii}

State and National trends show increases in median age, with New York State 2019 median age of 38.8 years and U.S. 2019 median age of 38.1 years. However, the LCLG Region contains 3 of the top 5 counties with the highest median ages in New York State. Hamilton County maintains the highest median age (55.3 years) in New York State, followed by Essex County (47.7 years) the 4th highest in NYS, and Warren County (46.8 years) the 5th highest in NYS. While not among the highest in NYS, Washington County's median age (44.2 years) and Clinton County (39.5 years) are higher than State and National rates.

The LCLG Region has a smaller share of population of 18 and younger (17.4%) compared to NYS (20.4%) and the US (22%). Similarly, the region has a higher share of population over 65 (20.3%) compared to the state (17.1%) and nation (16.6%).

On a sub-regional scale, Clinton County maintains the highest share of working-age adults (65.7%) and Hamilton County has the highest percentage of adults 65+ years (28.3%).

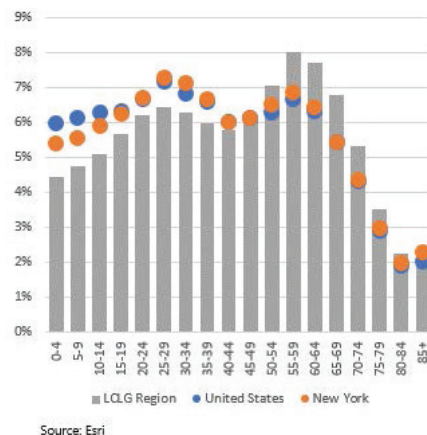
HOUSING UNITS^{ix}

Between 2010 and 2020, the LCLG Region increased the amount of occupied housing units by 2% and decreased the amount of vacant housing by 3%. The median age of housing units in the LCLG Region is 54 years old (1967), compared to the New York State median of 64 years (1957) and U.S. median of 43 years (1978).

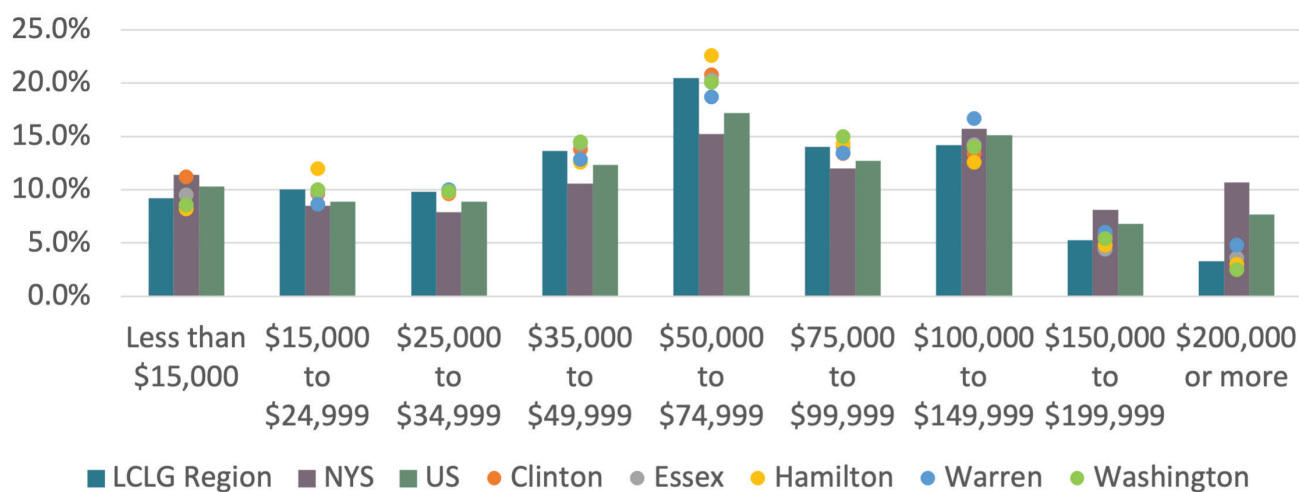
HOUSEHOLD INCOME^x

An important indicator of the economic well-being of a community is median household income (MHI).

Population Distribution by Age,
2020



Household Income Distribution, 2019



Race & Ethnicity

What is Race?

A person's self-identification with 1 or more social groups. They include, White, Black/ African American, Asian, American Indian, and Native Hawaiian/Pacific Islander.

What is Ethnicity?

Ethnicity determines whether a person is of Hispanic origin or not. Hispanics may report as any Race.

- U.S. Census Bureau

The MHI for counties in the LCLG Region, range from a low of \$56,365 in Clinton County to a high of \$61,024 in Warren County. The LCLG Region MHI average of \$58,017, is approximately 18% less than the New York State MHI (\$68,486) and the 8% less than the U.S. MHI (\$62,843).

On a municipal level, 38% of the communities in the LCLG Region report 2019 median household incomes below 80% of the New York State MHI. Essex and Washington Counties each represent 26% of these communities, while Clinton County represents 19%, and Hamilton and Warren Counties each represent 15%. Median household incomes vary, from a low of \$31,563 in the Town of Morehouse (Hamilton County) to a high of \$75,882 in the Town of Cambridge (Washington County).

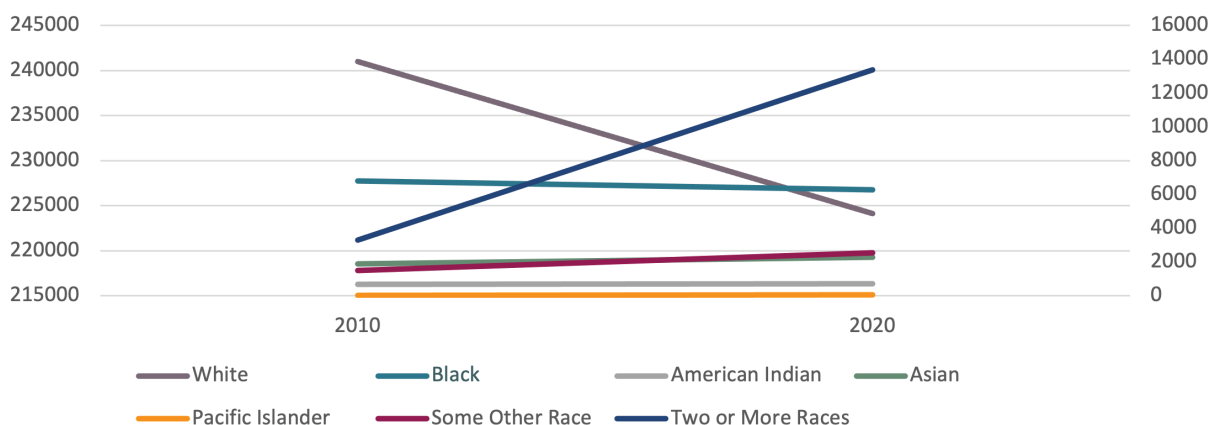
RACE & ETHNICITY^{xi}

The LCLG Region is predominantly White, which accounts for over 90% of the region's population. However, racial diversity is incrementally increasing. Between 2010 and 2020, the LCLG Region witnessed a 306% increase in residents identifying as Two or More Races. This demographic, the second largest racial cohort in the region, comprises 5.4% of the population, followed by Black residents (2.5%).

Like racial trends, the LCLG Region saw an increase in the number of residents identifying as Hispanic or Latino ethnicity. This cohort represents a small proportion of the region's population (3%) compared to NYS (20%) and the U.S. (19%). However, the region added 1,725 Hispanic/Latino residents, increasing the share of these residents by almost a full percentage point (0.8%) within the past 10 years.

The largest gains in residents with Hispanic or Latino ethnicities were found in the region's most populous counties, Clinton County (802 residents) and Warren County (574 residents).

Change in Racial Composition LCLG Region (2010-2020)



EDUCATIONAL ATTAINMENT^{xii}

An important determinant of workforce skills and talent is the level of education achieved by the population. Generally, higher levels of educational attainment yield higher-paying employment opportunities for the workforce.

In the LCLG Region, approximately 90% of the population (25+ years) have received a High School Diploma/ GED or higher, compared to NYS (92%) and U.S. (97%).

In the LCLG Region, approximately 25% of the population (25+ years) have received a bachelor's degree, compared to NYS (39%) and U.S. (36%).



**Student
Population
Decrease
of 2,066**

SCHOOL ENROLLMENT^{xiii}

In 2020, there were a total of 30,654 students enrolled in 47 schools in the LCLG Region. Since 2014, student enrollment throughout the region has declined at a rate double (-6%) that of the declines experienced statewide (-3%). The largest decrease in student enrollment was in Warren County (-732 students), followed by Washington County (-547 students).

SCHOOL ENROLLMENT, BY RACE/ETHNICITY^{xiv}

The student population in the LCLG Region is predominantly White (93%), which is more than double the New York State proportion of White students (42%). The White demographic saw the steepest decline in student enrollment, a loss of 2,318 (-1.2%) students in the region.

Hispanic students, the second largest racial/ethnic group in the region, comprises 32% of all Non-White students in the LCLG Region, however, make up only 2.2% of all students. Hispanic students accounted for the second largest racial/ethnic group increase, adding 165 students to the student population.

According to the U.S. Census, the second largest racial/ethnic minority in the LCLG Region are those who identify as *Two or More Races*. Similarly, students identifying as *Multi-Racial*, comprise 30% of Non-White students, and account for 2% of all students, making it the third largest racial/ethnic demographic in the region's student body.

GRADUATION RATES^{xv}

A key indicator in future economic performance is graduation rate. Every county in the LCLG Region, except Hamilton County, saw increases in the percentage of students graduating high school. Graduation rates in Hamilton County fell by 6% since 2014.

The graduation rate for the LCLG Region (87%) is slightly above that of the New York State (85%). However, academic performance is not ubiquitous across all demographics.

The region's biggest gain in enrollment, between 2014-2020, was students of a "multi-racial" background, and added 258 students to school districts in the region. However, the 2020 graduation rate for these students was only 56%, far below the New York State average of 84% for the same demographic.

The second largest gain in enrollment was among students identifying as Hispanic, with an increase of 165 students. Similar to graduation rates of multi-racial students, only 73% of Hispanic students and 75% of Black students in the region completed a K-12 education, compared to graduation rates for White (88%) and Asian/Pacific Islander (96%) students.

| Demographic | % Student Population | LCLG Graduation Rate | NYS Graduation Rate |
|--|----------------------|----------------------|---------------------|
| American Indian | 0.2% | Inf. data | 77% |
| Black | 1.5% | 75% | 78% |
| Hispanic | 2.2% | 73% | 77% |
| Asian/Pacific Islander | 0.9% | 96% | 91% |
| White | 93.2% | 88% | 91% |
| Multi-Racial | 2.0% | 56% | 84% |
| Total Student Population (Race/Ethnicity) | | 87% | 85% |
| Economically Disadvantaged | 47.4% | 79% | 80% |

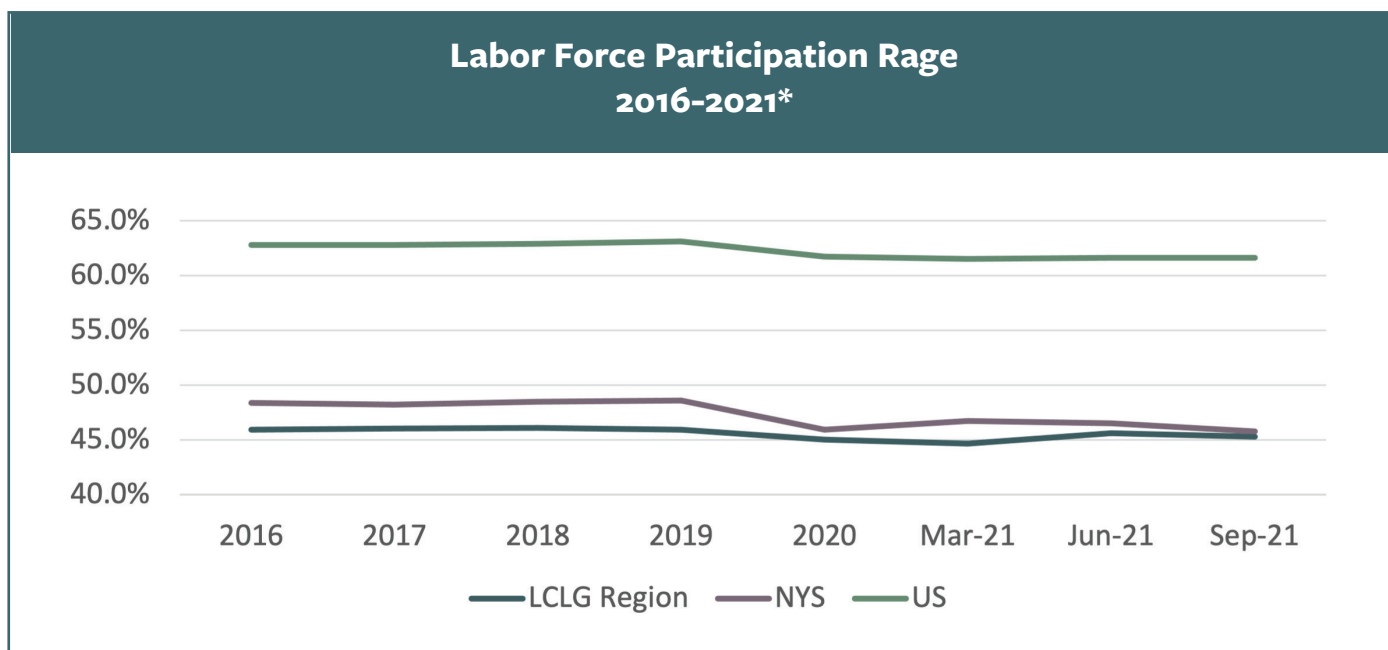
Source: NYS Department of Education

Another important demographic that comprises our local school districts is students identified as *Economically Disadvantaged*. Economically disadvantaged students are defined as students who participate in economic assistance programs, such as the free or reduced-price lunch, SSI, and Food Stamps. This demographic represents approximately half (47%) of the currently enrolled student population in the LCLG Region, an increase of about 500 students since 2014. While the graduation rate for these students (79%) is similar to that of the State (80%), it is far below that of the regional graduation rate of 85%.

LABOR FORCE PARTICIPATION RATES^{xvi}

Labor force participation, or the percentage of the civilian noninstitutional population 16 years and older that is working or actively looking for work, in the LCLG Region has historically been below New York State and national averages, reaching a high of 46.1% in 2018.

Similar to New York and the United States, the LCLG Region saw a decline in the labor force participation rate between 2019 and 2020, due in large part to the COVID-19 pandemic. Labor force participation rates during the second half 2021 have been above the 2020 annual average and are on track to return to pre-pandemic levels.



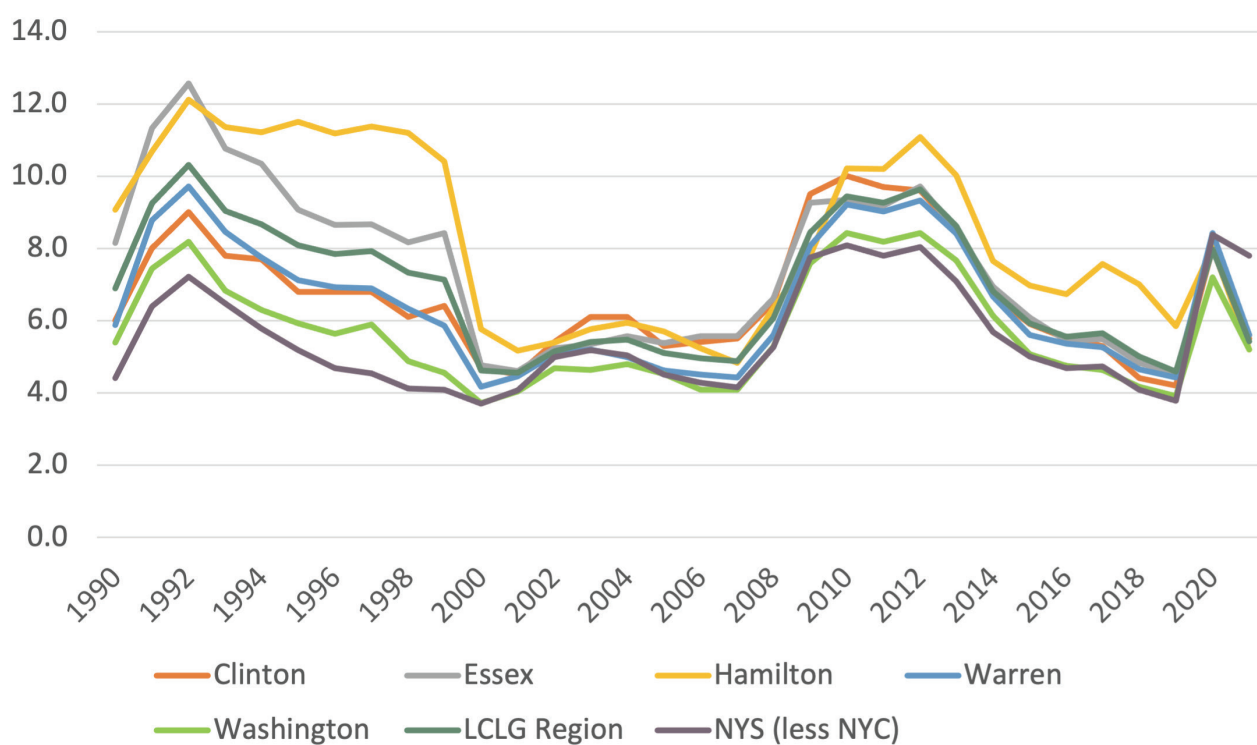
UNEMPLOYMENT RATES^{xvii}

Throughout the 1990's, unemployment levels in the LCLG Region were consistently higher than those of New York State (outside of New York City).

As a result of the COVID-19 pandemic, every county in the LCLG Region, except for Hamilton County, saw the highest level of unemployment during April 2020 - with unemployment reaching as high as 18.9% in Essex County.

While annual unemployment data is unavailable for 2021, regional trends show a considerable decline in unemployment levels – on-track to meet previous levels.

Unemployment: 1990-2021*



EMPLOYMENT

During the first decade of the 21st Century, employment levels in the LCLG Region remained above or consistent with State and National trends. However, since the 2008 Recession, the LCLG Region employment base has grown by only 1%, while the State grew employment by 12% and the country by 14%.

The economic impact resulting from the COVID-19 pandemic led the LCLGRP to undertake a regional Economic Resiliency Plan, with support from the EDA, to develop strategies that can improve economic resiliency from future economic disruptions. Additional information can be found in the Economic Resilience section of this plan.

Between Q1 2020 and Q1 2021 shows a 6% decline (6,275 jobs) in regional employment. These employment losses in each county ranged from a low of 5.9% in Washington County and a high of 7.1% in Warren County.

Employment opportunities are concentrated in Warren County (35%) and Clinton County (34%), followed by Washington County (15%), Essex County (14%), and Hamilton County (2%)^{xviii}.

EMPLOYMENT DISTRIBUTION^{xix}

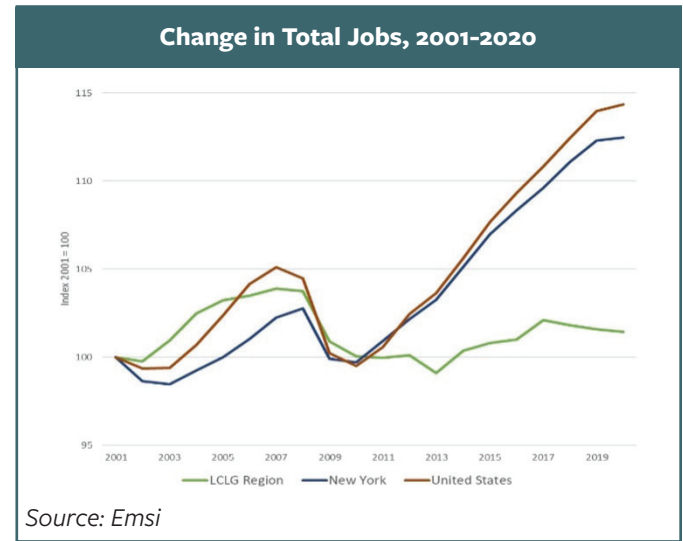
The predominant industry sector in the LCLG Region is Government, providing approximately 21% of all jobs. This is followed by Health Care and Social Assistance (14%), Retail Trade (13%), Accommodation and Food Services (11%), and Manufacturing (9%).

| | Top 5 Regional Industry Sectors | Average Annual Earnings |
|----|-----------------------------------|-------------------------|
| 1. | Government | \$76,824 |
| 2. | Health Care and Social Assistance | \$37,768 |
| 3. | Retail Trade | \$36,279 |
| 4. | Accommodations and Food Services | \$30,176 |
| 5. | Manufacturing | \$72,079 |

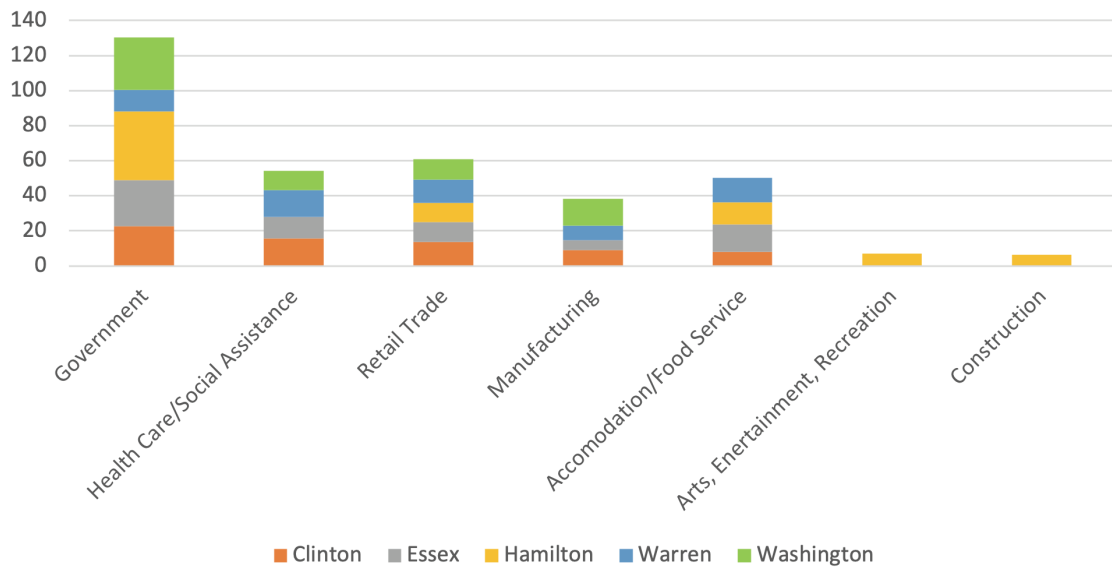
Source: Emsi

The average earnings per job in the region is \$55,751, which is far below that of New York State's average earnings per job, \$88,755.

Sub-regional employment distribution is largely consistent with regional trends.



Top 5 Industries, by County



Source: Emsi

EMPLOYMENT TRENDS^{xx}

Between 2015 and Q1 2020, the LCLG Region added a net 690 jobs. The majority of these jobs were in Government and Health Care and Social Assistance. Retail Trade and Administrative/Support and Waste Management Services suffered the greatest job losses during that same period.

An assessment of 4-Digit NAICS level data, for the period between 2015 and Q1 2020 was completed to identify employment trends. Education and Hospitals (9036) provides nearly 8,400 jobs in the region, followed by Restaurants and Other Eating Places (7,070 jobs).

Of the region's top 20 industries, nearly half lost jobs between 2015-2020, particularly Pulp, Paper, and Paperboard Mills, which lost 487 jobs.

| | Top 6 Regional Industry Sectors (4-Digit NAICS) | Average Annual Earnings |
|----|--|-------------------------|
| 1. | Education & Hospitals | \$75,103 |
| 2. | Restaurants and Other Eating | \$24,385 |
| 3. | Local Government (excluding Education & Hospitals) | \$62,188 |
| 4. | State Government (excluding Education & Hospitals) | \$106,667 |
| 5. | General Medical & Surgical Hospitals | \$78,060 |
| 6. | Traveler Accommodation | \$33,046 |

Source: Emsi

An assessment of 6-Digit NAICS level data, for the period between 2015 and Q1 2020 was completed to identify employment trends. Employment in the top 6-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 and State Correctional Facilities); General Medical and Surgical Hospitals (driven in part by Glens Falls Hospital); and Full-Service Restaurants.

| | Top 10 Regional Industry Sectors (6-Digit NAICS) | Average Annual Earnings |
|-----|--|-------------------------|
| 1. | Elementary and Secondary Schools | \$77,255 |
| 2. | Local Government (excluding Education & Hospitals) | \$62,188 |
| 3. | State Government (excluding Education & Hospitals) | \$106,667 |
| 4. | General Medical & Surgical Hospitals | \$78,060 |
| 5. | Full-Service Restaurants | \$25,786 |
| 6. | Hotels (except Casino Hotels) and Motels | \$33,383 |
| 7. | Limited-Service Restaurants | \$22,058 |
| 8. | Supermarkets and Other Grocery (Convenience) Stores | \$31,670 |
| 9. | Offices of Physicians (except Mental Health Specialists) | \$96,133 |
| 10. | Nursing Care Facilities (Skilled Nursing Facilities) | \$44,143 |

Source: Emsi

SECTOR OUTPUT^{xxi}

Economic performance in the LCLG Region can be measured by Gross Regional Product (GRP), or the monetary measure of the market value of all goods and services produced, in the LCLG Region.

In the region, the Government sector provides the greatest contribution to GRP (20%). This is followed by Manufacturing (16%), Health Care and Social Assistance (11%), Retail Trade (10%), and Accommodation and Food Services (6%).

Among these industry sectors, Manufacturing offers the greatest potential for export opportunities from the LCLG Region. In addition to offering export benefits to the region, the Manufacturing industry provides the 4th highest average annual earnings (\$72,079) in the region.

Average annual earnings of those in the top 5 industry sectors contributing to GRP, range from a high of \$76,824 (Government) to a low of \$30,176 (Accommodations and Food Services) – a range of about \$46,650.

| Top 5 Industries by Employment and GRP | | | | | |
|--|--------------|-----------------|-------|----------|----------|
| Industry | Employment % | Employment Rank | GRP % | GRP Rank | Earnings |
| Government | 20.9% | 1 | 20.0% | 1 | \$76,824 |
| Health Care and Social Assistance | 14.1% | 2 | 10.5% | 3 | \$37,768 |
| Retail Trade | 12.9% | 3 | 9.8% | 4 | \$36,279 |
| Accommodations and Food Service | 10.6% | 4 | 6.2% | 5 | \$30,176 |
| Manufacturing | 9.1% | 5 | 15.9% | 2 | \$72,079 |

Source: Emsi

As identified in the table above, Manufacturing is among the top (#2) contributors to Gross Regional Product and offers some of the highest average annual earnings in the LCLG Region. However, Manufacturing only accounts for 9% of the region's employment.

Three of the top five employing industries (Health Care and Social Assistance, Retail Trade, and Accommodations and Food Services) offer annual earnings of less than \$40,000. An analysis of earnings by industry sector on a sub-region basis, finds even greater variation in the average annual earnings for these top five employing industries (see below).

| Top 5 Regional Industries, Annual Earnings | | | |
|--|--|-------------------------------|--------------------------------|
| Industry | Average Annual Earnings (LCLG Region) | Range of Earnings (Lowest) | Range of Earnings (Highest) |
| Government | \$76,824 | \$70,452 (Hamilton) | \$87,658 (Clinton) 20.0% |
| Health Care and Social Assistance | \$37,768 | \$44,757 (Washington) | \$64,281 (Warren) 10.5% |
| Retail Trade | \$36,279 | \$32,510 (Hamilton) | \$38,329 (Warren) 9.8% |
| Accommodations and Food Service | \$30,176 | \$20,747 (Washington) | \$31,467 (Essex) 6.2% |
| Manufacturing | \$72,079 | \$49,134 (Hamilton) | \$84,686 (Essex) 15.9% |

Source: Emsi

Economic Resilience

The Forward Together: Economic Resiliency Plan, released in October 2021, provides an economic overview of the region, and a characterization of the region's workforce, foundational assets, and competitive assets.

The plan identifies three economic resiliency indicators that will play a role in the future economic recovery of the region, which include Supply Chain Disruptions, Aging Workforce, and Automation. Like many regions, nationwide, businesses in the LCLG Region are facing a workforce shortage. The Forward Together: Economic Resiliency Plan identifies four conditions in the region that are exacerbating the worker shortage and/or influencing the future of employment in the region:

- **Limited population growth + aging workforce**

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. 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 work to ensure that the region has the housing and infrastructure needed to attract and retain residents and workers.

The Forward Together: Economic Resiliency Plan characterizes 5 foundational assets that are essential components of the region's infrastructure, supporting the region's businesses, residents, and workforce.

- | | |
|---------------------------|-------------------------|
| 1. Housing | 4. Transportation |
| 2. Broadband and Cellular | 5. Water and Wastewater |
| 3. Child Care | |

Based on the input from the economic assessment, LCLGRP staff, Working Group, surveys, and industry-specific stakeholder focus groups, the LCLGRP identified 6 economic imperatives for supporting regional economic resiliency against future disruptions.



Forward Together: Imperatives for Economic Resilience



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.



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.



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.



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.



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.



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 Forward Together: Economic Resiliency Plan identifies 39 recommended projects or initiatives that advance the six economic priorities described above, for the purpose of improving economic resilience. Insights generated from the Resiliency Plan have informed proposed approaches identified in the CEDS, to secure economic resilience in the LCLG Region.

The Forward Together: Economic Resiliency Plan can be found in **Appendix 4**.

SWOT Analysis

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis considers the internal factors (strengths and weaknesses) and external factors (opportunities and threats) that influence economic development in the LCLG Region.

To gather stakeholder input, responses were solicited from communities and stakeholder organizations between September and October 2021, for the SWOT Analysis and Project Solicitation. A total of 98 responses were received from academia, business, and government.

Additionally, over 180 priority projects and programs were submitted by local and regional stakeholders for consideration in the CEDS. Respondents were asked to submit projects and programs under 12 categories:

- Business Assistance
- Workforce Development
- Downtown/Hamlet Revitalization
- Drinking Water
- Wastewater
- Broadband and Telecommunications
- Housing
- Diversity and Equity
- Environmental Sustainability
- Transportation
- Child Care and Elder Care
- Other

Distribution of Survey Responses








| Geographic Area | % |
|-----------------------|-----|
| Clinton County | 10% |
| Essex County | 29% |
| Hamilton County | 9% |
| Warren County | 17% |
| Washington County | 14% |
| Regional Stakeholders | 21% |

Strengths

| Quality of Life & Communities | Recreational Resources | Environment & Natural Resources | Tourism | Education & Schools | Public Safety | Access to Canadian Border |
|---|---|---|---|--|---|---|
|  |  |  |  |  |  |  |

Top strengths for the LCLG Region are primarily related to the area's quality of life, which includes access to recreational amenities, the natural environment, education, and public safety. The region's tourism industry and access to the Canadian Border are of special economic importance to area stakeholders.








Weaknesses

| Housing Options | Broadband & Cell Coverage | Job Opportunity | Childcare & Eldercare Options | Transportation Options | Regulations | Business Climate & Incentives |
|---|---|---|---|--|---|---|
|  |  |  |  |  |  |  |

The region's rural geography contributes significantly to the lack of access to broadband and telecommunication infrastructure, as well as access to childcare and transportation options. The lack of housing options for low to middle income households presents challenges in attracting new members to the workforce. Housing issues have been greatly exacerbated by the COVID-19 pandemic, as interest in the area that grew during early lockdowns has yet to subside creating highly competitive housing markets.

| Opportunities | | | | | | |
|---|---|---|---|--|---|---|
| Federal, State & Local Grants | Improvement of Infrastructure | Downtown & Hamlet Revitalization | Preserve Environmental Resources | Attraction of Young Professionals & Families | Greater Intermunicipal Cooperation | More Housing Options |
|  |  |  |  |  |  |  |

Stakeholders view investments in our infrastructure, downtowns, and environmental resources as some of the greatest opportunities to attract and retain young professionals and families to fill employment needs. Grant funding and improved intermunicipal cooperation are also viewed as meaningful opportunities to improve economic growth.

| Threats | | | | | | |
|---|---|---|---|--|---|---|
| Lack of Housing Options | Lack of Well-Paying Job | Energy Prices | Lack of Business Incentives | Lack of Technical Assistance for Small Businesses | Future Closure of the Canadian Border | Public Health Emergencies |
|  |  |  |  |  |  |  |

The lack of housing options, well-paying job opportunities, and business technical assistance and incentives are viewed as threats to the region's ability to improve economic indicators. Additionally, uncertainty about energy prices, closure of the U.S./Canadian border, and public health emergencies concern area stakeholders.

More details about the SWOT Analysis Results can be found in **Appendix 3**.

Strategic Direction

The LCLGRPB has outlined strategic priorities to implement over the next five years, along with indicators for assessing progress. LCLGRPB's six goals are accompanied by recommended approaches and methods of implementation to advance economic opportunity in the LCLG Region. Key to the advancement of the CEDS, the LCLGRPB proposes the formation of a Regional Economic Partnership (REP) to improve awareness of regional economic issues and enhanced coordination of regionally significant economic priorities.

The LCLGRPB CEDS vision statement captures the ideal economic development future for the region. The vision statement will guide the LCLGRPB's work plan and the content of the goals, strategies, and priority actions in the CEDS. The LCLGRPB worked with its CEDS Strategy Committee to reach a shared vision, representative of the region's priorities.

Vision

The LCLGRPB Region enjoys a lively entrepreneurial and business development sector that provides first-rate employment opportunities for its dynamic workforce who enjoy a high quality of life with stunning natural resources, world-class recreational opportunities, and vibrant community centers served by modern infrastructure.

GOALS

To execute the CEDS vision, the LCLGRPB proposes six goals to achieve through its 2022-2027 CEDS.

- 1. Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities**
Regardless of type or size, communities across the LCLG Region have unmet infrastructure needs that are inhibiting economic growth and development. Improving access to broadband internet, telecommunications, water and sewer, transportation options, and clean energy infrastructure is critical for providing equitable economic opportunities to the region.
- 2. Enhance Quality of Life and Support Vibrant Community Centers**
Quality of life is the number one strength of the region. To maintain the quality of life enjoyed in the region, consistent efforts to improve the condition of our community centers and reliable community services, like child care and public safety, are necessary. Fostering communities that are welcoming of diverse backgrounds, improving accessing to local food products, and promoting infill redevelopment will support vibrant community centers.
- 3. Promote Regional Collaboration and Outreach**
Improved regional collaboration between economic and community development organizations, leveraged as a result of the COVID-19 pandemic, has put a spotlight on important regional challenges. The LCLGRPB will promote improved coordination of strategic priorities, in cooperation with regional partners through its Regional Economic Partnership (REP) and other opportunities.
- 4. Support Entrepreneurship and Business Development Opportunities**
New entrepreneurs and existing small businesses owners face financial, social, and regulatory challenges. Improving awareness of financial and technical resources for small businesses will be key to support the region's private sector. Additionally, addressing supply chain issues, promoting Foreign Direct Investment (FDI), and monitoring existing and emerging industrial clusters will be key to supporting well-paying job opportunities and private investment.
- 5. Improve Workforce Readiness**
Providing future generations with education and skills, and upskilling the incumbent workforce is necessary to meet the demands of tomorrow's economy. The LCLGRPB will work with its partners to advance strategic priorities that prepare our region's workforce.

6. *Preserve Natural Resources & Expand Recreational Opportunities*

The region's natural resources provide overwhelming economic benefits to the region, through tourism and agriculture. Preserving these natural resources and expanding recreational amenities will be pertinent to supporting the region's economy.

The rural context and limited financial resources in the LCLG Region create challenges in realizing the goals outlined in the CEDS. The LCLGRP views this as an opportunity to provide a forum for dialogue and collaboration between stakeholder organizations and communities.

Informed by input from the Strategy Committee and regional stakeholders, the LCLGRP will begin formation of the Lake Champlain – Lake George Regional Economic Partnership (REP), under the following framework.

| Purpose | |
|---|--|
| Leverage regional economic development partners to increase economic opportunity and advance the strategic priorities of the CEDS | |
| Partners | Activities |
| <ul style="list-style-type: none"> • Economic Development Organizations • Chambers of Commerce • Planning & Economic Development Departments • Industrial Development Agencies • Community Development Organizations • Institutions of Higher Education | <ul style="list-style-type: none"> • Monitor economic trends • Conduct stakeholder meetings • Issue newsletter containing funding opportunities, project updates, and regional news |

STRATEGIES

The following strategic objectives are intended to advance the six goals described above. These strategies reflect the general approach to resolving regional challenges and opportunities.

Goal 1 Strategies | *Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities*

- 1.1. Identify needs and address water and sewer system affordability and sustainability
- 1.2. Assist local governments access funding for regionally significant municipal drinking water and wastewater improvements
- 1.3. Eliminate barriers to improve access to broadband and telecommunications services
- 1.4. Develop solutions to rural, inter-community transportation for residents, local workforce, and visitors
- 1.5. Support the development of initiatives that reduce the disposal of organic waste materials (food scraps) and expand markets for recyclable materials
- 1.6. Support greater utilization of renewable energy and building weatherization by local governments, residents, and businesses to reduce energy costs and combat climate change
- 1.7. Prepare the region for greater utilization of electric vehicles (EV) through the installation of EV charging infrastructure

- 1.8. Support infrastructure to support shovel-ready industrial and commercial development areas

Goal 2 Strategies | *Enhance Quality of Life and Support Vibrant Community Centers*

- 2.1. Strengthen downtowns and community centers that serve as anchors for regional economic activity
- 2.2. Create economic opportunity through improved access to child care
- 2.3. Support development of diverse and affordable housing options
- 2.4. Support the provision of rural health care services
- 2.5. Support access to local food and value-added agricultural products
- 2.6. Improve economic opportunities and address barriers affecting traditionally underrepresented residents, including Black, Indigenous, & People of Color (BIPOC), LGBTQA+, disabled, women, veterans, and low/moderate income residents
- 2.7. Identify regional solutions to address sustainable emergency services staffing in rural areas
- 2.8. Expand opportunities for brownfield redevelopment, infill development, and adaptive reuse

Goal 3 Strategies | *Promote Regional Collaboration and Outreach*

- 3.1. Continue the LCLGRPBs role as the regional coordinating economic development organization
- 3.2. Coordinate with stakeholders to address regional housing challenges
- 3.3. Implement regional economic development framework
- 3.4. Improve access to technical assistance and training for local government officials
- 3.5. Improve engagement with the Adirondack/Glens Falls Transportation Council (A/GFTC), the Metropolitan Planning Organization (MPO) for Warren and Washington Counties
- 3.6. Implement a “hub and spoke” model between the EDD and local economic development organizations and chambers of commerce for improved communication, data sharing, and program delivery
- 3.7. Foster collaboration between high schools, community colleges, career and technical education (CTE) groups, workforce development boards, and industries
- 3.8. Provide regular updates to regional stakeholders about regional economic indicators, through use of newsletters and other communications

Goal 4 Strategies | *Support Entrepreneurship and Business Development Opportunities*

- 4.1. Promote small business activity in community centers
- 4.2. Support business development assistance, including business succession planning and 1:1 business counseling
- 4.3. Ensure women, minorities, and veterans are accessing and engaging in the ecosystem
- 4.4. Promote agribusiness and local food industries as a growth area for applicable parts of the region and to adapt to changes in the agricultural product supply chain
- 4.5. Strengthen existing industry clusters and develop emerging clusters within the region

- 4.6. Highlight the value of the U.S. - Canadian border to the regional economy
- 4.7. Grow awareness and utilization of financial assistance resources available to businesses
- 4.8. Implement Forward Together Business Retention and Expansion Program
- 4.9. Collaborate with local and regional tourism stakeholders to improve tourist experiences in the region
- 4.10. Monitor the introduction of New York State Regulated Cannabis Industry, its economic impacts and opportunities

Goal 5 Strategies | *Improve Workforce Readiness*

- 5.1. Improve career readiness of high school graduates
- 5.2. Support improvements at regional higher education facilities that improve access to learning
- 5.3. Explore transportation options for improving mobility to workplaces
- 5.4. Support training opportunities to upskill the incumbent workforce

Goal 6 Strategies | *Preserve Natural Resources & Expand Recreational Opportunities*

- 6.1. Showcase the region as a leader in climate protection
- 6.2. Continue to maintain high water quality in area waterbodies
- 6.3. Protect prime farmland from urban sprawl and promote the growth of agritourism to support access to local products and improve economic opportunities for local agricultural businesses
- 6.4. Improve hazard mitigation and climate resiliency
- 6.5. Support the development of multi-use trails and supportive infrastructure for existing outdoor recreation facilities
- 6.6. Support project and programs that enhance access and functionality of local waterfronts
- 6.7. Advocate for the provision of adequate staff resources to manage regional recreation amenities
- 6.8. Support sustainable growth of regional tourism attractions and amenities

Action Plan

A list of acronyms used in the Action Plan tables, can be found at the end of this section.

Cost Estimate

\$ = \$0-100,000 | \$\$ = \$1000,001-\$500,000 | \$\$\$ = \$500,001-\$1M
 \$\$\$\$ = \$1,000,001-\$5M | \$\$\$\$\$ = \$5M+

Schedule

S = Short (1-3 years) | L = Long (4-5 years) | O = Ongoing

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|--|----------|---------------|---------------------------|--------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 1.1 | 1 | Complete regional assessment of water and sewer facilities | LCLGRP | Water Districts Sewer Districts Counties | S | \$\$ | EDA | ESD DOS | Counties |
| 1.1 | 2 | Develop Hamlet Wastewater Feasibility Plan for Warren County. The plan would evaluate the feasibility and costs of establishing, modernizing, and expanding wastewater infrastructure to increase development opportunities in rural hamlets. | Warren County | LCLGRP APA | S | \$\$ | NBRC | DEC DOS | Warren County |
| 1.1 | 3 | Support creation of First Capital Grant Fund to facilitate first expenses of expanding or establishing water/wastewater infrastructure | APA | LCLGRP ESD | L | \$\$\$ | | ESD EFC USDA | Counties |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|------------------|--|----------|---------------|---------------------------|------------|------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.1 | 4 | Improve awareness of state and federal funding opportunities for improving infrastructure | LCLGRP | USDA EFC REP | O | \$ | | | LCLGRP Counties |
| 1.1 | 5 | Support coordination of inter-municipal stakeholders to facilitate implementation of the Regional Sewer Infrastructure Consolidation & Upgrade Report (Glens Falls, Queensbury, Kingsbury, Washington County Sewer District #2, Moreau) | LCLGRP | Glens Falls (C) Queensbury (T) Kingsbury (T) Washington County Moreau (T) Warren County | S | \$\$\$ | EDA USDA | DOS EFC | Municipalities |
| 1.2A | 6 | New water treatment plant, Rouses Point | Rouses Point (V) | LCLGRP Clinton County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Rouses Point (V) |
| 1.2A | 7 | Drinking well improvements, Long Lake | Long Lake (T) | LCLGRP Hamilton County | S | \$\$ | EDA USDA | EFC HCR | Long Lake |
| 1.2A | 8 | Install new drinking well and expand water district, Warrensburg | Warrensburg (T) | LCLGRP Warren County | S | \$\$ | EDA USDA | EFC HCR | Warrensburg |
| 1.2A | 9 | Drinking water system improvements and extension, Greenwich (V) | Greenwich (V) | LCLGRP Washington County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Greenwich (V) |
| 1.2A | 10 | Village of Speculator public water system upgrades | Speculator (V) | LCLGRP Hamilton County | S | \$\$\$\$ | EDA USDA | EFC HCR | Speculator (V) |
| 1.2A | 11 | Diamond Point Water District Improvements, Lake George | Lake George (T) | LCLGRP Warren County | S | \$\$\$ | EDA USDA | EFC HCR | Lake George (T) |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|--------------------|-----------------------------|----------|---------------|---------------------------|------------|--------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.2A | 12 | Eagle Lake Water District formation and improvements, Ticonderoga | Ticonderoga (T) | LCLGRP Essex County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Ticonderoga (T) |
| 1.2A | 13 | Morrisonville water district update, Schuyler Falls | Schuyler Falls (T) | LCLGRP Clinton County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Schuyler Falls (T) |
| 1.2A | 14 | Bolton, Phase II and III - Water Source and Distribution System Upgrades | Bolton (T) | LCLGRP Warren County | S | \$\$\$\$ | EDA USDA | EFC HCR | Bolton (T) |
| 1.2A | 15 | Creek Road Water Main Replacement, Crown Point | Crown Point (T) | LCLGRP Essex County | S | \$\$\$\$ | EDA USDA | EFC HCR | Crown Point (T) |
| 1.2A | 16 | Drinking well improvements, North Hudson | North Hudson (T) | LCLGRP Essex County | L | \$ | EDA USDA | EFC HCR | North Hudson (T) |
| 1.2A | 17 | Drinking water improvements, Jay | Jay (T) | LCLGRP Essex County | L | \$ | EDA USDA | EFC HCR | Jay (T) |
| 1.2A | 18 | Retrofit/replace aging drinking water purification systems with infrared purification systems, Whitehall (V) | Whitehall (V) | LCLGRP Washington County | L | \$\$\$\$\$ | EDA USDA | EFC HCR | Whitehall (V) |
| 1.2A | 19 | Extend municipal water service to Hamilton County IDA site in Speculator | Hamilton County | LCLGRP Speculator (V) | L | \$\$\$\$ | EDA USDA | EFC HCR | Hamilton County |
| 1.2A | 20 | Drinking water system improvements, including water mains replacements , Plattsburgh (C) | Plattsburgh (C) | LCLGRP Clinton County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Plattsburgh (C) |
| 1.2A | 21 | Port Henry Water District Improvements, Moriah (T) | Moriah (T) | LCLGRP Essex County | S | \$ | EDA USDA | EFC HCR | Moriah (T) |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|-----------------------------|----------|---------------|---------------------------|------------|-----------------|
| | | | | | | | Federal | State | Local/Private |
| 1.2A | 22 | Blue Mountain Lake Water Project, including well and transmission lines, Indian Lake (T) | Indian Lake (T) | LCLGRP Hamilton County | S | \$\$\$\$ | EDA USDA | EFC HCR | Indian Lake |
| 1.2A | 23 | Pottersville Water Improvements, Chester (T) | Chester (T) | LCLGRP Warren County | S | \$\$\$\$ | EDA USDA | EFC HCR | Chester |
| 1.2A | 24 | Water District Assessment and Improvements, Lake George (V) | Lake George (V) | LCLGRP Warren County | S | \$\$\$ | EDA USDA | EFC HCR | Lake George (V) |
| 1.2A | 25 | Town water district creation and infrastructure expansion, Lake George (T) | Lake George (V) | LCLGRP Warren County | L | \$\$\$\$ | EDA USDA | EFC HCR | Lake George (T) |
| 1.2A | 26 | Upgrades to Keene Water District II | Keene (T) | LCLGRP Essex County | S | \$\$\$\$ | EDA USDA | EFC HCR | Keene |
| 1.2A | 27 | Upgrades to water system | Argyle (V) | LCLGRP Washington County | S | \$\$\$\$ | USDA | EFC HCR | Argyle (V) |
| 1.2A | 28 | Feasibility study to support installation of municipal sewer system, Salem | Salem (T) | LCLGRP Washington County | S | \$\$\$ | EDA USDA | EFC HCR | Salem (T) |
| 1.2A | 29 | Upgrades to WWTP including chlorination, Speculator (V) | Speculator (V) | LCLGRP Hamilton County | S | \$\$\$\$ | EDA USDA | EFC HCR | Speculator (V) |
| 1.2A | 30 | Replace aging pump station generators and pumps, Whitehall (V) | Whitehall (V) | LCLGRP Washington County | S | \$\$\$ | EDA USDA | EFC HCR | Whitehall (V) |
| 1.2B | 31 | Collection System upgrades, Crown Point | Crown Point (T) | LCLGRP Essex County | S | \$\$\$\$ | EDA USDA | EFC HCR | Crown Point (T) |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-------------------|-----------------------------|----------|---------------|---------------------------|------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.2B | 32 | Expand sewer capability, Hudson Falls | Hudson Falls (V) | LCLGRP Washington County | L | \$\$\$\$ | EDA | EFC HCR | Hudson Falls (V) |
| 1.2B | 33 | Complete improvements in Sewer District FE1A, including moving sewer main into public ROW and separation of storm and sanitary sewer, Washington Co | Washington County | LCLGRP Fort Edward (T/V) | L | \$\$\$\$\$ | EDA NBRC HUD | EFC HCR | Washington County |
| 1.2B | 34 | Wastewater System upgrade and expansion, including wastewater plant upgrades, Greenwich (V) | Greenwich (V) | LCLGRP Washington County | L | \$\$\$\$\$ | EDA USDA NBRC | EFC HCR | Greenwich (V) |
| 1.2B | 35 | Development of Lakeshore Drive Sewer District and stormwater improvements, Lake George | Lake George (T) | LCLGRP Warren County | L | \$\$\$\$\$ | EDA USDA | EFC HCR | Lake George (T) |
| 1.2B | 36 | Bolton, Phase II Wastewater Treatment Plant and Distribution System Upgrades | Bolton (T) | LCLGRP Warren County | L | \$\$\$\$\$ | EDA USDA | EFC HCR | Bolton (T) |
| 1.2B | 37 | Lagoon upgrades and disinfection, Jay | Jay (T) | LCLGRP Essex County | L | \$\$\$\$ | EDA USDA | EFC HCR | Jay (T) |
| 1.2B | 38 | Installation of municipal sewer system, Cambridge (V) | Cambridge (V) | LCLGRP Washington County | S | \$\$\$\$\$ | EDA USDA | EFC HCR | Cambridge (V) |
| 1.2B | 39 | Improvements to the Glens Falls Wastewater Treatment Plant, including Biosolids Remediation, and Combined Sewer Overflow (CSO) | Glens Falls (C) | LCLGRP Warren County | L | \$\$\$\$\$ | EDA | EFC HCR | Glens Falls |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|------------------------|-----------------------------|----------|---------------|---------------------------|-------------------|------------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.2B | 40 | Expand sewer district, Warrensburg | Warrensburg (T) | LCLGRP Warren County | S | \$\$\$\$\$ | EDA USDA NBRC | EFC HCR | Warrensburg (T) |
| 1.2B | 41 | Updates to Water Pollution Control Plan and Sanitary Sewer System, Plattsburgh (C) | Plattsburgh (C) | LCLGRP | S | \$\$\$ | EDA USDA NBRC | EFC HCR | Plattsburgh (C) |
| 1.2B | 42 | Septic System Upgrades at Washington County Fairgrounds | Washington County Fair | LCLGRP Washington County | S | \$\$ | USDA NBRC | ESD | Washington County Fair |
| 1.2B | 43 | Complete planning for proposed Elizabethtown wastewater system, Elizabethtown (T) | Elizabethtown (T) | LCLGRP Essex County | S | \$ | USDA | EFC HCR | Elizabethtown (T) |
| 1.2B | 44 | Complete planning for proposed Village of Argyle wastewater system, Argyle (V) | Argyle (V) | LCLGRP Washington County | L | \$ | USDA | EFC HCR | Argyle (V) |
| 1.2B | 45 | Improvements to Caldwell Sewer District, Lake George (T) | Lake George (T) | LCLGRP Warren County | L | \$\$\$ | EDA USDA NBRC | EFC HCR | Lake George (T) |
| 1.2B | 46 | Planning, design and construction of sewer separation and sewer improvements in the Village of Hudson Falls to improve water quality in the Hudson River. The project will include storm sewer separation and sanitary sewer rehabilitation. The separation of documented storm sewers from the existing combined sanitary sewer system. | Washington County | LCLGRP | S | \$\$\$\$\$ | EDA USDA NBRC | DEC EFC HCR | Washington County |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|------------------------|----------|---------------|---------------------------|------------------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.2B | 47 | Planning, design and construction of Septage Receiving, Storage and Sludge Drying. Construction of a new septage and liquid waste receiving station at the existing WCSD #2 WWTP. The new facilities would allow pretreatment to be provided to allow the septage and liquid waste to be added later into the treatment train. | Washington County | LCLGRP | L | \$\$\$\$\$ | EDA USDA NBRC | DEC EFC HCR | Washington County |
| 1.2B | 48 | Planning, design and construction of the Notre Dame Pump Station rehabilitation to maintain water quality in the Hudson River. Notre Dame Pump Station Rehabilitation. | Washington County | LCLGRP | S | \$ | EDA USDA NBRC | DEC EFC HCR | Washington County |
| 1.2B | 49 | Upgrade municipal sewer system, Moriah (T) | Moriah (T) | LCLGRP Essex County | L | \$\$\$\$\$ | EDA USDA NBRC | EFC HCR | Moriah (T) |
| 1.2B | 50 | Complete seasonal disinfection improvements at St. Armand WWTP | St. Armand (T) | LCLGRP Essex County | L | \$\$\$\$ | EDA USDA NBRC | DEC EFC HCR | St. Armand (T) |
| 1.3 | 51 | Complete broadband and telecommunications deployment strategy | LCLGRP | BWG | S | \$ | NTIA NBRC | ESD NYSTEC DHSES | Counties |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|------------------------------------|----------|---------------|---------------------------|------------------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.3 | 52 | Launch pilot broadband deployment and small cell cellular project | LCLGRP | BWG | S | \$\$\$\$ | NTIA NBRC | ESD NYSTEC DHSES | Counties |
| 1.3 | 53 | Ensure accuracy of state and federal broadband mapping | LCLGRP | BWG | S | \$ | | | Counties |
| 1.3 | 54 | Complete cellular infrastructure plan and project pre-permitting to identify coverage gaps, identify appropriate sites and technology, obtain contracts and permits, and then identify funding to incentivize development | LCLGRP | BWG | S | \$\$\$ | NTIA NBRC | ESD NYSTEC DHSES | Counties |
| 1.3 | 55 | Complete “Middle Mile” Broadband Connections | LCLGRP | BWG | S | \$\$\$\$\$ | EDA NTIA USDA | | |
| 1.3 | 56 | Complete “Last Mile” Broadband Connections | LCLGRP | BWG | S | \$\$\$\$\$ | EDA NTIA USDA | | |
| 1.3 | 57 | Add additional local broadband switch capacity to ensure connectivity during peak tourist season | Lake George (V) | LCLGRP Warren County | L | \$\$\$ | EDA NTIA | ESD | Lake George (V) |
| 1.4 | 58 | Develop rural transportation strategies and implement recommendations | LCLGRP | AGFTC REP WDB United Ways | S | \$\$ | DOT FTA RTAP | DOT | Counties AGFTC |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|--|----------------------------|----------|---------------|---------------------------|------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.4 | 59 | Support infrastructure improvements to bolster east/west roadway with egress to Rugar/190 intersection (Plattsburgh) | NCCC | LCLGRP | S | \$\$\$\$ | EDA NBRC USDA | ESD DOT | County |
| 1.4 | 60 | Support planning and development of multi-modal transportation center, Glens Falls (C) | Glens Falls (C) | LCLGRP | S | \$\$\$\$ | DOT | DOT | Counties AGFTC |
| 1.4 | 61 | Explore merger of the Capital District Transportation Authority (CDTA) and Greater Glens Falls Transit (GGFT) through development of feasibility study. | Warren County Washington County GGFT CDTC | LCLGRP | S | \$ | | DOT | Counties AGFTC |
| 1.4 | 62 | Explore opportunities to replicate NC MOVES: North Country Micro-financing of Vehicles to Encourage Sustainability program to help ALICE (asset-limited, income-constrained, employed) families purchase reliable vehicles through low interest loans. | LCLGRP | Adk Foundation Counties | S | \$ | DOT FTA RTAP | DOT | Counties AGFTC |
| 1.5 | 63 | Support establishment of regional food scraps diversion program, composting facility, and establish pilot program for community composting | Counties | LCLGRP | S | \$\$ | EPA USDA | DEC ESD | Counties |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|----------------------|----------|---------------|---------------------------|------------------------|-----------------|
| | | | | | | | Federal | State | Local/Private |
| 1.5 | 64 | Explore feasibility for biodigester renewable energy generation from municipal waste, food waste and dairy waste. | LCLGRP | CCE Counties | L | \$\$ | EPA USDA | DEC ESD | Counties |
| 1.6 | 65 | Support installation of solar array at Lake George WWTP | Lake George (V) | LCLGRP | S | \$\$\$ | | NYSERDA | Lake George (V) |
| 1.6 | 66 | Expand awareness of clean energy programs, such as Community Choice Aggregation, Community Solar, and Commercial Property Assessed Clean Energy (C-PACE) financing for energy efficiency and renewable energy improvements | LCLGRP | CSC CDRPC ANCA | O | \$ | | NYSERDA DEC NYPA | |
| 1.6 | 67 | Support public and private energy efficiency upgrades to mitigate contributions to greenhouse gas emissions | Glens Falls (C) | LCLGRP | L | \$\$\$\$\$ | | NYSERDA DEC HCR | |
| 1.7 | 68 | Leverage available tools through NYSERDA and technical resources from CDRPC and ANCA to deploy EV infrastructure | LCLGRP | CDRPC ANCA | S | \$\$ | | | |
| 1.7 | 69 | Support addition of Fast Charge EV Stations, Indian Lake (T) | Indian Lake (T) | LCLGRP | S | \$ | | NYSERDA DEC | |

Goal 1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|----------------------------|----------------------|----------|---------------|---------------------------|----------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 1.8 | 70 | Support the extension of electrical service, roadway and other infrastructure improvements to the Plattsburgh Industrial Park | NCCC | LCLGRP | L | \$\$\$\$\$ | EDA NBRC | NYSDOT NYPA | DANC |
| 1.8 | 71 | Support the extension of infrastructure to Canalside Energy Park | WWIDA | LCLGRP | S | \$\$\$\$\$ | EDA NBRC | NYSDOT ESD | IDA |
| 1.8 | 72 | Support relining of approximately 8,400 linear feet (LF) of the existing collection system utilizing cured-in-place pipeline (CIPP) techniques. In addition, approximately 23 manholes require rehabilitation. | Washington County WWIDA | LCLGRP | S | \$\$\$\$ | | ESD | Washington County |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-------------------|-------------------------|----------|---------------|---------------------------|---------------------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.1 | 73 | Promote the region as an attractive place for young professionals | LCLGRPB | EDO | O | \$ | | ESD DOS DEC | |
| 2.1 | 74 | Promote the LCLGRPB's North Country Main Street Reinvestment Program to provide technical support for hamlet/main street planning and placemaking | LCLGRPB | MSAC | S | \$ | | | |
| 2.1 | 75 | Complete main street redevelopment site assessments | LCLGRPB | MSAC IDA LDC | S | \$ | EDA | ESD | |
| 2.1 | 76 | Create funding pool for adaptive reuse/feasibility studies for historic buildings in Washington County towns and villages that can support attraction/ development of new businesses to the downtown areas and create a process for awards for revitalization of buildings. | Washington County | LCLGRPB | S | \$ | NBRC | HCR ESD | |
| 2.1 | 77 | Support downtown revitalization and streetscape improvement projects | MSAC | LCLGRPB | S | \$ | USDA NBRC | DOS ESD HCR DOT | |
| 2.1 | 78 | Support Ticonderoga Mont-calm Street Improvements | Ticonderoga (T) | LCLGRPB Essex County | S | \$ | USDA NBRC | DOS ESD HCR DOT DEC | |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|-----------------------------|----------|---------------|---------------------------|---------------------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.1 | 79 | Support downtown façade and streetscape improvements in Chestertown and Pottersville | Chester (T) | LCLGRP Warren County | S | \$\$\$ | USDA NBRC | DOS ESD HCR DOT DEC | |
| 2.1 | 80 | Support Southern Gateway Improvement Project, Lake George (V) | Lake George (V) | LCLGRP Warren County | S | \$\$\$\$ | USDA NBRC | DOS ESD HCR DOT DEC | |
| 2.1 | 81 | Support Port Henry Hamlet Revitalization | Moriah (T) | LCLGRP | L | \$\$\$ | USDA NBRC | DOS ESD HCR DOT DEC | |
| 2.1 | 82 | Support streetscape improvements, Argyle (V) | Argyle (V) | LCLGRP Washington County | L | \$\$ | USDA NBRC | DOS ESD HCR DOT DEC | |
| 2.1 | 83 | Support greenspace and pocket park development along main street to support green spine initiative | Elizabethtown (T) | LCLGRP Essex County | S | \$\$\$ | NBRC | DEC DOS HCR | |
| 2.1 | 84 | Support creation of façade improvement fund | LCLGRP | | S | \$\$ | NBRC | ESD HCR | |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------------|---|----------|---------------|---------------------------|-------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.1 | 85 | Promote “Complete Streets” streetscapes in downtown community centers, including | LCLGRP | AGFTC NYSDOT Highway Departments | O | \$ | | NYSDOT DOS | |
| 2.1 | 86 | Support downtown business assistance programs, such as AEDC’s, Main Street Sustainable Growth Program | LCLGRP | AEDC EDO | O | \$ | SBA | ESD | |
| 2.1 | 87 | Promote land use plans and codes that incentivize and facilitate the redevelopment of existing structures and encourage infill development | LCLGRP | MSAC | O | \$\$ | | DOS | |
| 2.2 | 88 | Support establishment of a staffed family child care network | CCN | LCLGRP | S | \$\$ | | ESD OCFS | Counties |
| 2.2 | 89 | Recruit, train, and open more homebased child care | CCN | LCLGRP | L | \$\$ | | DOL | Counties |
| 2.2 | 90 | Support regional childcare advocates in their efforts to increase childcare provider revenue potential, including the provision of family child care start up funds | CCN | LCLGRP | L | \$\$ | USDA | DOH HCR ESD | |
| 2.2 | 91 | Implement recommendations identified in the Adirondack Foundation’s comprehensive analysis of costs associated with Prenatal to 5 child care and home visiting initiatives | CCN Adk Foundation | LCLGRP | S | \$\$ | HHS USDA NBRC | DOH HCR | |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------------|----------------------|----------|---------------|---------------------------|-------------|-------------------|
| | | | | | | | Federal | State | Local/Private |
| 2.3 | 92 | Complete regional housing assessment and strategy, and implement recommendations | LCLGRPB | CDC HWG | S | \$\$ | NBRC | HCR | Counties |
| 2.3 | 93 | Support formation of Land Banks | LCLGRPB | CDC HWG | L | \$\$\$ | | | Counties |
| 2.3 | 94 | Support the development of prefabricated housing factory in Adirondack Park | LCLGRPB | APA | L | \$\$\$\$\$ | EDA | ESD | |
| 2.3 | 95 | Support creation of program to rehabilitate underutilized housing stock, support homebuyer assistance, and workforce housing development | LCLGRPB | CDC HWG HAPEC | S | \$\$\$ | USDA | HCR NYSERDA | |
| 2.3 | 96 | Farmworker Housing programs. Partner with HVADC to manage program to purchase and deploy manufactured housing to Farms in Washington County; possibly manage a farmworker housing rehabilitation program | Washington Co. | HVADC | S | \$\$\$ | USDA | DAM HCR | Washington County |
| 2.3 | 97 | Support construction of seasonal workforce housing in Lake George | Lake George (T) | ORDA LCLGRPB | S | \$\$\$\$ | | ESD | IDA |
| 2.3 | 98 | Support construction of seasonal workforce housing at the Adirondack Experience (Blue Mountain Lake) | Adirondack Experience | Indian Lake LCLGRPB | S | \$\$\$\$ | | ESD | IDA |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|---|-----------------------------|----------|---------------|---------------------------|------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.3 | 99 | Support funding for the Adirondack Land Trust, PRIDE of Ticonderoga, and Friends of the North Country to rehabilitate 3 homes each year | Adirondack Land Trust PRIDE of Ticonderoga Friends of the North Country | HAPEC LCLGRP | S | \$\$\$\$ | | HCR | |
| 2.3 | 100 | Support workforce housing projects in Glens Falls (C) | Glens Falls (C) | LCLGRP | L | \$\$\$\$\$ | | HCR | IDA |
| 2.3 | 101 | Owkill Commons Revitalization Initiative includes a component focused on expanding housing in existing distressed structures and constructing new housing | Cambridge (V) | LCLGRP Washington County | L | \$\$\$\$ | | ESD HCR | IDA |
| 2.3 | 102 | Complete Senior Housing Site Suitability Study. This project would evaluate the feasibility and location appropriateness of developing senior housing at various places throughout the county. Improving housing options available to seniors may increase the availability of housing stock | Warren County | LCLGRP | L | \$ | | HCR DOH | |
| 2.3 | 103 | Promote public/private partnerships to support construction of workforce housing in hamlets and urban areas | LCLGRP | | L | \$ | | HCR | IDA |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|-----------------------------|----------|---------------|---------------------------|-------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.3 | 104 | Support partnership with Rural Preservation Corporation to develop and or rehab additional Senior Housing units. Also create a homebuyer assistance program aimed at attracting young workers to area. | Washington County | LCLGRPB | L | \$\$ | | HCR | |
| 2.3 | 105 | Increase capacity for land trusts and support county land bank efforts | LCLGRPB | Counties | | | | | Counties |
| 2.4 | 106 | Support and replicate existing mobile health care providers | LCLGRPB | Health Care Systems AHI | L | \$\$\$\$ | | DOH | |
| 2.4 | 107 | Explore developing rural health care housing program | LCLGRPB | EDO | L | \$\$ | | ESD DASNY | |
| 2.4 | 108 | Expand access to health and wellness programs, including mental health services | LCLGRPB | Health Care Systems AHI | O | \$\$ | | DOH | |
| 2.4 | 109 | Conduct a regional food assessment, which includes viability of grocery markets in rural communities | LCLGRPB | CCE | S | \$ | | DEC DAM ESD | |
| 2.4 | 110 | Support local cooperative food programs, like Adirondack Harvest | CCE | LCLGRPB | O | \$ | | DAM | |
| 2.4 | 111 | Improve integration of diversity and equity awareness and programming into LCLGRPB work program. | LCLGRPB | ANCA-ADI Community Colleges | O | \$ | | ESD | |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|-----------------------------|----------|---------------|---------------------------|--------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.6 | 112 | Support culturally competent leadership training and community outreach | LCLGRP | ANCA-ADI Community Colleges | S | \$ | | ESD | |
| 2.6 | 113 | Support initiatives like Welcoming Diverse Workforce Training | AEDC | LCLGRP | S | \$\$ | | DOL ESD | |
| 2.6 | 114 | Support virtual employment workshops for recently incarcerated individuals and resources for re-entry | E&T | Warren County | | | | DOL | |
| 2.6 | 115 | Enhance outdoor recreation facilities for a more diverse user group. Outdoor recreation is critical to the quality of life of the area as well as the tourism economy. However, the user groups of many of the outdoor recreation facilities are not representative of the overall visitor base and population. This project would develop and implement an approach to make Warren County's outdoor recreation facilities more inclusive. | Warren County | LCLGRP APA ANCA-ADI | | | | OPRHP DOS | |

Goal 2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|--------------------------|----------|---------------|---------------------------|-------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 2.7 | 116 | Engage with Local Emergency Planning Committees (LEPC) and County Emergency Services Departments to develop solutions to staffing and training issues related to rural emergency services personnel (EMS/ Fire) | LCLGRP | LEPC Counties | S | \$ | | DSHES | Counties |
| 2.8 | 117 | Pursue Brownfield Opportunity Area (BOA) designations in relevant geographies | LCLGRP | MSAC | S | \$ | | DOS | |
| 2.8 | 118 | Host Brownfield Summit | LCLGRP | | | | | DOS | LCLGRP |
| 2.8 | 119 | Create a targeted brownfield inventory for the region which prioritizes properties based on redevelopment potential, while incorporating expected reuse access, community impacts, and other characteristics | LCLGRP | MSAC | S | \$ | EPA | DOS | |
| 2.8 | 120 | Support Common's Hamlet Revitalization Project, Indian Lake (T) | Indian Lake (T) | LCLGRP Hamilton County | S | \$\$\$ | EDA NBRC EPA | ESD | |
| 2.8 | 121 | Support Owlkill Commons Incubator Revitalization Initiative, Greenwich (V) | Cambridge (V) | LCLGRP Washington County | S | \$\$\$\$\$ | EDA NBRC EPA | ESD | |

| Goal 2 Enhance Quality of Life and Support Vibrant Community Centers | | | | | | | | | |
|--|------------|--|-----------------|------------------------------|----------|---------------|---------------------------|-------|---------------|
| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
| | | | | | | | Federal | State | Local/Private |
| 2.8 | 122 | Support planning and redevelopment of former Miromar Outlet Mall | Champlain (T) | Clinton County IDA LCLGRP | L | \$\$ | EDA NBRC EPA | ESD | |

Goal 3 | Promote Regional Collaboration and Outreach

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|-----------------------------|----------|---------------|---------------------------|-------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 3.1 | 123 | Improve awareness of the LCLGRP as a regional research and planning partner and the region's only Economic Development District | LCLGRP | EDO Counties ESD | S | \$ | EDA | ESD | LCLGRP |
| 3.2 | 124 | Establish regional coordination group and champion for housing | LCLGRP | CDC HWG Housing Authorities | S | \$ | | | LCLGRP |
| 3.3 | 125 | Convene regular meetings of CEDS Strategy Committee or Regional Economic Partnership to monitor progress and adjust strategies | LCLGRP | REP | O | \$ | EDA | | LCLGRP |
| 3.3 | 126 | Identify economic development initiatives that are ideal for regional partnerships while also assisting with county and local projects | LCLGRP | REP | O | \$ | EDA | | LCLGRP |
| 3.4 | 127 | Provide technical assistance to communities lacking local capacity | LCLGRP | REP | S | \$ | EDA | | LCLGRP |
| 3.5 | 128 | Maximize utilization of the Transportation Improvement Plan (TIP) to advance bicycle, pedestrian, and vehicular improvements, especially if complimentary to initiatives of the LCLGRP | LCLGRP | AGFTC | S | \$ | | | LCLGRP A/GFTC |

Goal 3 | Promote Regional Collaboration and Outreach

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|------------------------------------|----------|---------------|---------------------------|-------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 3.6 | 129 | Utilize the LCLGRP's Business Retention & Expansion Program | LCLGRP | EDO | O | \$ | EDA | ESD | LCLGRP |
| 3.7 | 130 | Develop and improve training opportunities that align with education skills | LCLGRP | WDB BOCES Community Colleges | S | \$\$ | EDA | ESD | |
| 3.8 | 131 | Deploy and promote use of the LCLG Regional Economic Dashboard to monitor regional demographic and economic trends to address issues in real-time | LCLGRP | REP | O | \$ | EDA | | LCLGRP |

Goal 4 | Support Entrepreneurship & Business Development Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|----------------------|----------|---------------|---------------------------|-------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 4.1 | 132 | Match small businesses and startups with main street spaces | LCLGRP | IDA LDC CDC | S | \$ | | ESD | IDA |
| 4.1 | 133 | Support main street rent stabilization | LCLGRP | IDA LDC CDC | S | \$\$ | | HCR | IDA |
| 4.2 | 134 | Reimagine supply chain resilience through entrepreneurship | LCLGRP | EDO | S | \$ | EDA | ESD | |
| 4.2 | 135 | Coordinate cohorts for regional small business training and support | LCLGRP | AEDC NCCC SBDC | S | \$\$ | | ESD | |
| 4.2 | 136 | Hold startup pitch competition | LCLGRP | EDO SBDC | S | \$ | | | LCLGRP |
| 4.2 | 137 | Host a regular event series focused on networking and support | LCLGRP | EDO SBDC | S | \$ | | ESD | LCLGRP |
| 4.2 | 138 | Promote awareness of business succession planning offered through ANCA's, North Country Center for Businesses in Transition | LCLGRP | ANCA | O | \$ | SBA | ESD | ANCA |
| 4.2 | 139 | TA Assistance Fund. Create a fund available to small business that will facilitate technical assistance/ consulting such as marketing, scale up, market research, expansion, finance, new business assistance | LCLGRP | Counties | S | \$\$ | EDA NBRC USDA | HCR | |

Goal 4 | Support Entrepreneurship & Business Development Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|--------------------|----------------------|----------|---------------|---------------------------|-------------------|---------------------|
| | | | | | | | Federal | State | Local/Private |
| 4.3 | 140 | Improve awareness of M/WBE and SDVOB Certification and other government procurement opportunities | LCLGRP | AEDC ESD | S | \$ | | ESD | |
| 4.4 | 141 | Establish a regional agricultural hub | CCE | LCLGRP | L | \$\$\$ | USDA | DAM ESD | |
| 4.4 | 142 | Explore mobile meat processing facilities | IDAs | LCLGRP | L | \$\$\$ | USDA | DAM ESD | |
| 4.5 | 143 | Support organizations that serve regional industry clusters | LCLGRP | EDO | O | \$ | EDA | ESD | |
| 4.5 | 144 | Conduct regional economic diversification assessment, including in-depth targeted industry analysis that identifies the linkages between targeted clusters | LCLGRP | EDO ESD | S | \$\$ | EDA | ESD | |
| 4.5 | 145 | Develop business marketing plan for former Clinton County Airport Industrial Park | Clinton County IDA | LCLGRP | S | \$ | USDA | NYSEG ESD | Clinton County |
| 4.5 | 146 | Develop White Creek Business Park Feasibility Study | White Creek (T) | LCLGRP | S | \$ | USDA | National Grid ESD | IDA White Creek (T) |
| 4.6 | 147 | Monitor cross-border economic activity and trends | LCLGRP | NCCC ESD | O | \$ | | | LCLGRP |

Goal 4 | Support Entrepreneurship & Business Development Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|----------------------------------|----------|---------------|---------------------------|---------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 4.6 | 148 | Expand opportunities for Foreign Direct Investment (FDI) into the region, following models like the North Country Chamber of Commerce's NYMTL (Where New York Meets Montreal) Initiative | LCLGRP | NCCC ESD EDO | S | \$ | EDA | ESD | |
| 4.7 | 149 | Support creation of quick access to capital convertible loan to grant program | EDOs | LCLGRP | L | \$\$ | | ESD | APA |
| 4.7 | 150 | Support collaborations between revolving loan funds | LCLGRP | IDA CDC AEDC | S | \$ | EDA USDA | ESD | |
| 4.7 | 151 | Promote existing small business loan programs, administered by the LCLGRP | LCLGRP | EDO | O | \$ | | | LCLGRP |
| 4.8 | 152 | Tailor BRE Survey questions for real-time labor market information | LCLGRP | EDO | O | \$ | | | LCLGRP |
| 4.9 | 153 | Establish regional destination management planning working group and conduct destination management planning | LCLGRP | ROOST LGRCC & CVB Counties | S | \$ | | ESD | ROOST NCCC |
| 4.9 | 154 | Implement Village of Lake George wayfinding and cultural heritage signage project | Lake George (V) | LCLGRP | S | \$ | | OPRHP DEC DOS | |

Goal 4 | Support Entrepreneurship & Business Development Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|---|-----------------|----------------------|----------|---------------|---------------------------|------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 4.9 | 155 | Implement Village of Whitehall wayfinding and interpretive signage project | Whitehall (V) | LCLGRP | S | \$ | | DOS DEC | |
| 4.9 | 156 | Conduct feasibility assessment for construction of Ticonderoga Visitor Center | TACC | LCLGRP | S | \$\$ | | ESD | |
| 4.10 | 157 | Monitor economic activity and trends of newly state regulated cannabis industry | LCLGRP | EDO | O | \$ | | OCM ESD | |

Goal 5 | Improve Workforce Readiness

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|--|----------|---------------|---------------------------|---------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 5.1 | 158 | Advocate for BOCES (CTE) Skill Building in place of study hall | LCLGRP | WDB BOCES | S | \$ | | | LCLGRP |
| 5.1 | 159 | Replicate “career jam” program across the region | LCLGRP | WDB BOCES | S | \$ | | DOL | Counties |
| 5.1 | 160 | Support initiatives that support minority and/or economically distressed students | LCLGRP | BOCES NAACP United Ways | S | \$\$ | | DEC HCR | Counties |
| 5.2 | 161 | Support construction of Regional Higher Education Center to house the Learning Innovation Center (LInC), which will support 10 state-of-the-art distance learning studios (SUNY ADK) | SUNY Adirondack | LCLGRP Warren/ Washington (Co) | S | \$\$\$\$ | EDA | SUNY | Counties |
| 5.3 | 162 | Advance summer housing and transportation program for J-1 student workers and SUNY ADK students, utilizing SUNY Adirondack dorms to assist area’s hospitality industry | LCLGRP | SUNY Adirondack Hospitality Industry Warren/ Washington (Co) | S | \$\$ | | | Counties |
| 5.3 | 163 | Work with local employers to create sustainable bike and bus pass program for area workforce | E&T | LCLGRP | S | \$ | FTA | DOT | Counties |

Goal 5 | Improve Workforce Readiness

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|------------------------------------|----------|---------------|---------------------------|--------------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 5.4 | 164 | Support incumbent worker training for advanced manufacturing, construction, lineman, emergency services, water and sewer operators, and other relevant industries to upskill workforce | LCLGRP | WDB BOCES Community Colleges | S | \$ | NBRC | DOL WDB E&T ESD | |
| 5.4 | 165 | Support apprenticeship/ internship programs | LCLGRP | WDB BOCES Community Colleges | S | \$ | EDA | DOL | |
| 5.4 | 166 | Improve understanding and develop programs that address underemployment and unemployment issues | LCLGRP | WDB Community Colleges E&T | S | \$ | EDA | DOL ESD | |
| 5.4 | 167 | Support workforce projects: youth pipelines to local industries, training sponsorship for in-demand industries, industry job fairs, leadership trainings to retain and upskill workers, virtual workshops, career classes to prepare students entering a new field, etc. | E&T | Community Colleges WDB | O | \$\$\$ | NBRC | DOL WDB E&T ESD | |
| 5.4 | 168 | Support development of active senior workforce recruitment program | E&T | United Ways LCLGRP | L | \$ | | DOL WDB E&T ESD | |

Goal 6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-----------------|--|----------|---------------|---------------------------|----------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 6.1 | 169 | Implement the decarbonization of the forestry and paper industry through the Adirondack Advanced Wood Innovation Group | LCLGRP | EDC WC APA NCCC/ NAmTrans | L | \$\$\$\$\$ | EDA NBRC USDA | ESD DEC NYSTEC | |
| 6.2 | 170 | Complete 9-Element Plan for the Upper Hudson Watershed | LCLGRP | UHC | S | \$\$\$ | | DOS | |
| 6.2 | 171 | Continue collaboration with water quality strategy committees and lake associations | LCLGRP | | S | \$ | | DEC | LCLGRP |
| 6.2 | 172 | Address salt contamination of municipal drinking water sources | LCLGRP | Water districts NYSDOT Highway departments | S | \$\$\$\$ | | HCR EFC USDA | |
| 6.2 | 173 | Promote winter road maintenance practices that reduce road salt pollution | LCLGRP | Highway departments NYSDOT ALA | S | \$ | | NYSDOT DOS | |
| 6.2 | 174 | Promote the sustainable funding strategies for invasive species prevention and management | LCLGRP | Counties SWCD | L | \$ | | DEC DOS | Counties |
| 6.3 | 175 | Implement priorities included in county Farmland Protection Plans (Essex and Washington Counties) | Counties | CCE Farm Bureau | S | \$\$\$\$ | LCBP | DAM DEC DOS | |

Goal 6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|------------------------|----------|---------------|---------------------------|---------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 6.3 | 176 | Support creation of Southern Washington County Agricultural Support Center will include meeting and office space, commercial kitchen that can be an innovation resource center, partner with food hubs and other ag entities | Washington County | LCLGRP HVADC | L | \$\$\$\$ | USDA EDA NBRC | DAM DEC | |
| 6.4 | 177 | Evaluate the capacity of utilities and infrastructure to withstand disaster. Prepare infrastructure and facilities for future climate change impacts (excessive heat, extreme weather) | LCLGRP | HMPG | S | \$ | FEMA | DSHES DEC DOS | |
| 6.4 | 178 | Complete flood attenuation plan for the LCLG Region | LCLGRP | UHC | S | \$ | | DOS DSHES | |
| 6.5 | 179 | Complete improvements at former Frontier Town site in North Hudson | North Hudson (T) | LCLGRP Property owners | L | \$\$\$\$ | | ESD DEC | |
| 6.5 | 180 | Support expansion of the Hamilton County multi-use recreational trail system | LCLGRP | Hamilton County | S | \$ | NBRC | DEC OPRHP ESD | |

Goal 6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|-----------------------------|----------|---------------|---------------------------|----------------------------|--------------------------------------|
| | | | | | | | Federal | State | Local/Private |
| 6.5 | 181 | Implementation of the Empire State Trail to Lake George Multi-Use Trail Modernization, Safety and Connectivity Plan. Warren County will undertake a trail improvement study to connect the Empire State Trail to multiple downtowns throughout the region. | Warren County | LCLGRP Washington County | L | \$\$\$\$ | NBRC | OPRHP DOS ESD | Feeder Canal Alliance Counties |
| 6.5 | 182 | Support development of multi-use path along Bolton Road, connecting Lake George Village and Bolton Landing | Warren County | LCLGRP | L | \$\$\$\$ | NBRC | OPRHP DOS ESD DEC | |
| 6.5 | 183 | Support development of Riverwalk Trail III project, Plattsburgh (C) | Plattsburgh (C) | LCLGRP | S | \$\$\$\$ | NBRC EPA | OPRHP DOS ESD DEC | |
| 6.5 | 184 | Promote Champlain Canal Trail (CCT) and support extension of CCT from Fort Ann (T) to Whitehall | Washington County | LCLGRP | L | \$ | NBRC | OPRHP DOS ESD DEC | CCT |
| 6.6 | 185 | Support redevelopment of the Dunbarton Mill Site in Greenwich | Greenwich (T) | LCLGRP GGCC | L | \$\$\$\$ | NBRC | ESD | |
| 6.6 | 186 | Support redevelopment of Town of Essex Marina | Essex (T) | LCLGRP Property owners | S | \$\$\$ | NBRC | ESD DOS | |

Goal 6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategy | Project ID | Project Description | Project Lead(s) | Project Stakeholders | Schedule | Cost Estimate | Potential Funding Sources | | |
|----------|------------|--|-------------------|-------------------------|----------|---------------|---------------------------|----------------------------|---------------|
| | | | | | | | Federal | State | Local/Private |
| 6.6 | 187 | Support development of Hudson River Park, Greenwich (T) | Greenwich (T) | LCLGRP | S | \$ | NBRC | OPRHP DOS ESD DEC | |
| 6.6 | 188 | Implement Mill Pond Walkway Feasibility Project | Horicon (T) | LCLGRP Warren County | S | \$ | NBRC | OPRHP DOS ESD DEC | |
| 6.6 | 189 | Support Deep Hollow Pond Access Improvements, Elizabethtown (T) | Elizabethtown (T) | LCLGRP Essex County | S | \$ | NBRC | OPRHP DOS ESD DEC | |
| 6.6 | 190 | Support initiatives that maintain access to the Erie/Champlain Canal for commercial traffic | LCLGRP | Counties | S | \$ | | DEC | |
| 6.7 | 191 | Support staff resources to manage boat inspection/decontamination stations and forest preserve lands | LCLGRP | AWI SWCD Counties | O | \$ | | DEC | |

CEDS Completed Actions

2023 Update

| Project ID# | CEDS Action Description | Advancement of Action |
|-------------|--|---|
| 22 | Schroon Wastewater Collection Main Upgrade (Rogers Brook) | Funding awarded (WIIA, NBRC) |
| 23 | Construction of North Creek Sewer System, Johnsbury | Funding awarded (NBRC, ESD, USDA) |
| 37 | Develop/update rural transportation strategies | Developing Rural Workforce Transportation Plan with A/GFTC |
| 47 | Establish Regional Main Street Alliance Program to provide technical support for hamlet/main street planning and placemaking | Funding awarded North Country Main Street Reinvestment Program Toolkit (ADK Foundation) Main Street Reinvestment Plans for Essex, Crown Point, Westport (USDA RBDG) |
| 50 | Promote “Complete Streets” streetscapes in downtown community centers | Grant submitted Village of Cambridge - Complete Street Policy & Implementation Plan |
| 52 | Promote land use plans and codes that incentivize and facilitate the redevelopment of existing structures and encourage infill development | Granville selected for EPA Recreation Economy for Rural Communities LCLGRP updating Johnsbury Comprehensive Plan Grants submitted for update of comprehensive plans for towns of Arietta, Chester, Horicon, Salem, and Village of Cambridge |
| 56 | Complete regional housing assessment and strategy | Finalizing regional workforce housing study and strategy |
| 66 | Improve integration of diversity and equity awareness and programming into LCLGRP work program. | DEIA Focus Group (May 2022) Participated in EDA Equitable Lending Partners Cohort Draft DEIA Statement |
| 76 | Provide technical assistance to communities lacking local capacity | LOIs submitted to USDOT Thriving Communities Program for Lake George, Bolton, Chester, Horicon, City of Glens Falls, and Village of Fort Edward |

CEDS Completed Actions

2023 Update

| Project ID# | CEDS Action Description | Advancement of Action |
|-------------|--|--|
| 77 | Maximize utilization of the Transportation Improvement Plan (TIP) to advance bicycle, pedestrian, and vehicular improvements, especially if complimentary to initiatives of the LCLGRP | Assisted communities submit projects through A/GFTC Program Solicitation |
| 80 | Deploy and promote use of the LCLG Regional Economic Dashboard to monitor regional demographic and economic trends to address issues in real-time | Regional Data Dashboards launched Spring 2022 |
| 110 | Support training for advanced manufacturing, construction, emergency services, water and sewer operators, and other relevant industries | Funding awards to NCCC Welding Training (NBRC) STEM Pre-Apprenticeship Program (ESD) |
| 114 | Complete 9-Element Plan for the Upper Hudson Watershed | Grant submitted |
| 115 | Continue collaboration with water quality strategy committees and lake associations | Attended meetings, implementation of roadside erosion grants (WQIP) |
| 116 | Address salt contamination of municipal drinking water sources | Congressionally Directed Spending application selected/referred to subcommittee Beekmantown Drinking Water Remediation |
| 117 | Promote winter road maintenance practices that reduce road salt pollution | Funding awarded Washington County Brine Maker (WQIP) |
| 119 | Evaluate the capacity of utilities and infrastructure to withstand disaster. Prepare infrastructure and facilities for future climate change impacts (excessive heat, extreme weather) | Completion of North Creek Ski Bowl Disaster Resiliency Project (EDA) Grant submitted to LCBP for Lake George Floodplain Management Plan |
| 120 | Complete flood attenuation plan for the LCLG Region | Grant submitted |

2022 Regional Funding Awards

| Agency/Program | County | Applicant | Project Title | Award | LCLGRP B Assisted |
|-----------------------|-----------------|-------------------|---|-------------|-------------------|
| Adirondack Foundation | LCLGRP B Region | LCLGRP B | North Country Main Street Reinvestment Program Toolkit | \$10,000 | X |
| CWIIA | Clinton | Champlain (V) | Wastewater Treatment Facility Disinfection Upgrade and Capital Improvement Plan | \$834,000 | |
| CWIIA | Essex | Moriah | Moriah Sewer Collection System Upgrades | \$3,577,469 | |
| DEC CSC C | Washington | Cambridge (V) | Complete Streets Policy & Implementation Plan | \$30,000 | X |
| DEC CSC I | Clinton | Plattsburgh (C) | Bike Friendly Plan Implementation | \$400,000 | |
| DOS BOA | Washington | Town of Greenwich | Town and Village of Greenwich BOA Predevelopment Activities | \$166,500 | |
| DOS LWRP | Warren | Town of Bolton | Veterans Memorial Park Improvements Phase 2 | \$1,725,000 | |
| DOS SGCP | Warren | Bolton | Town of Bolton Smart Growth Comprehensive Plan Update | \$50,014 | |
| DOS SGCP | Washington | Easton | Town of Easton Smart Growth Comprehensive Plan Update | \$45,400 | |
| DOS SGCP | Warren | Horicon | Town of Horicon Comprehensive Plan Update | \$90,000 | X |
| DOS SGCP | Clinton | Champlain (V) | Town and Village of Champlain Smart Growth Comprehensive Plan Update | \$46,080 | |
| DOS SGCP | Essex | Chesterfield | Town of Chesterfield Smart Growth Comprehensive Plan Update | \$63,000 | |
| DOS SGCP | Essex | Essex | Town of Essex Comprehensive Plan Update | \$67,500 | |
| DOS SGCP | Essex | North Elba | Town of North Elba and the Village of Lake Placid Comprehensive Plan Update | \$98,916 | |

2022 Regional Funding Awards

| Agency/Program | County | Applicant | Project Title | Award | LCLGRPB Assisted |
|----------------|-----------------|--|---|-------------|------------------|
| DWIIA | Essex | Willsboro | Willsboro Water Treatment Plant Upgrades | \$5,000,000 | |
| EDA EAA (ARPA) | Washington | Washington County Fair | Fairgrounds Broadband Infrastructure Upgrade | \$511,855 | |
| EFC EPG | Essex | Crown Point | Monitor Bay Effluent Study | \$50,000 | |
| EFC EPG | Essex | Lake Placid (V) | Sewer Collection System Study | \$50,000 | |
| EFC EPG | Washington | Argyle (V) | Sewer Study | \$30,000 | |
| ESD Grants | Washington | Washington County | Washington County Sewer District #1 Sanitary Sewer Replacement | \$226,000 | X |
| ESD MNY | Warren | Lake George Music Festival | Lake George Music Festival Plus Pass Tourism Working Capital | \$40,000 | |
| ESD MNY | Warren | Glens Falls Symphony Orchestra, Inc. | Glens Falls Symphony Marketing Tourism Working Capital | \$25,000 | |
| ESD MNY | Warren | The Sembrich | The Sembrich Centennial Marketing Initiative Tourism Working Capital | \$60,400 | |
| ESD MNY | Essex | United States Luge Association | 2023 Luge World Cup Tourism Working Capital | \$136,207 | |
| ESD MNY | Essex | The Fort Ticonderoga Association | Fort Ticonderoga Tourism Working Capital | \$211,700 | |
| ESD MNY | Essex, Franklin | Adirondack 1000 Islands Sports and Events Commission, Inc. | Empire State Winter Games Tourism Working Capital | \$100,000 | |
| ESD MNY | Hamilton | Adirondack Historical Association | Building African American Audiences for ADKX and the Region Tourism Working Capital | \$50,200 | |

2022 Regional Funding Awards

| Agency/Program | County | Applicant | Project Title | Award | LCLGRP Assisted |
|-----------------|------------|------------------|--|-------------|--------------------|
| ESD RESTORE NY | Washington | Hudson Falls (V) | 188 Main Street - Upper Floors | \$600,000 | |
| ESD RESTORE NY | Washington | Greenwich (V) | 132 Main Street Revitalization | \$1,600,000 | |
| ESD RESTORE NY | Essex | Saranac Lake (V) | Trudeau Village Redevelopment Project | \$1,300,000 | |
| Federal Earmark | Clinton | Beekmantown | Drinking Water Infrastructure Remediation | \$750,000 | X |
| HCR CP | Washington | Fort Edward (V) | Engineering Assessment of the Historic Fort Neighborhood | \$48,000 | |
| HCR HR | Essex | Essex County | Provide housing rehabilitation assistance to approximately 6 low- and moderate-income owner-occupied homes located on scattered sites, county-wide | \$451,221 | |
| HCR HR | Essex | Chesterfield | Provide Housing Rehabilitation assistance to five (5) low-moderate income homeowners within the Town | \$250,000 | |
| HCR HR | Essex | Lewis | Provide housing rehabilitation assistance to approximately 6 low- and moderate-income homeowners | \$383,537 | |
| HCR HR | Clinton | Schuyler Falls | Provide housing rehabilitation assistance to five (5) low-moderate income homeowners within the Town. | \$250,000 | |
| HCR PF | Essex | Jay | ADA access improvements at the Town Community Center | \$298,320 | |
| LCBP | Warren | LCLGRP | Septic Smart Campaign | \$7,150 | X |
| LCBP | Warren | Warren County | Warren County Culvert Assessments and Asset Management Plan | \$75,000 | X |

2022 Regional Funding Awards

| Agency/Program | County | Applicant | Project Title | Award | LCLGRPB Assisted |
|-----------------|------------|-----------------------------------|---|-------------|------------------|
| NBRC SEID | Essex | Schroon | Wastewater Improvement Project | \$853,440 | |
| NBRC SEID | Essex | Adirondack Mountain Club, Inc. | Cascade Cross Country Ski Center Renovation | \$303,960 | |
| NBRC SEID | Clinton | North Country Chamber of Commerce | Comprehensive Welding Training Program | \$285,600 | |
| NBRC SEID | Warren | Warren County | Warren County Bikeway and Feeder Canal Trail Improvement Plan | \$160,000 | |
| OPRHP EPF HP D | Essex | The Fort Ticonderoga Association | Restoring Fort Ticonderoga's North Demi-lune | \$390,457 | |
| OPRHP EPF PKS D | Warren | Town of Lake George | McPhillips Preserve at French Mountain Park Project | \$200,000 | |
| OPRHP EPF PKS D | Essex | Open Space Institute | Lake Placid Trailhead - Adirondack Rail Trail | \$500,000 | |
| OPRHP EPF PKS P | Essex | Adirondack Mountain Club, Inc. | Planning and Renovation of Cascade Cross Country Ski Center | \$101,925 | |
| USDA RBDG | Essex | LCLGRPB | North Country Main Street Reinvestment Program - Development of 3 Local Community Economic Development Plans for Essex, Westport, and Crown Point | \$96,000 | X |
| USDA WEP | Warren | Johnsburg | North Creek Sewer | \$1,493,000 | X |
| USDA WWDPP | Washington | Salem | Salem Wastewater Engineering Report | \$30,000 | |

2022 Regional Funding Awards

FUNDING PROGRAMS

| | |
|----------------|---|
| DEC CSC C | Department of Environmental Conservation - Climate Smart Communities (Certification) |
| DEC CSC I | Department of Environmental Conservation - Climate Smart Communities (Implementation) |
| DOS BOA | Department of State - Brownfield Opportunity Area |
| DOS LWRP | Department of State - Brownfield Opportunity Area |
| DOS SGCP | Department of State - Brownfield Opportunity Area |
| EDA EAA (ARPA) | Economic Development Administration - Economic Adjustment Assistance (American Rescue Plan) |
| EFC EPG | Environmental Facilities Corporation - Engineering Planning Grants |
| ESD Grants | Empire State Development - Capital Grant Program |
| ESD MNY | Empire State Development - Market New York |
| ESD RESTORE NY | Empire State Development - Restore New York |

| | |
|-----------------|--|
| HCR CP | Housing & Community Renewal - Community Planning |
| HCR HR | Housing & Community Renewal - Housing Rehabilitation |
| HCR PF | Housing & Community Renewal -Public Facilities |
| LCBP | Lake Champlain Basin Program |
| NBRC SEID | Northern Border Regional Commission - State Economic & Infrastructure Investment Program |
| OPRHP EPF PKS D | Office of Parks, Recreation, & Historic Preservation - EPF Parks (Development) |
| OPRHP EPF PKS P | Office of Parks, Recreation, & Historic Preservation - EPF Parks (Preservation) |
| USDA RBDG | USDA Rural Development - Rural Business Development Grants |
| USDA WEP | USDA Rural Development - Water & Environmental Programs |
| USDA WWDPP | USDA Rural Development - Waster & Wastewater Disposal Predevelopment Planning Grants |

List of Acronyms

| | |
|----------|--|
| AEDC | Adirondack Economic Development Corporation |
| AGFTC | Adirondack/Glens Falls Transportation Council |
| ALA | Adirondack Lakes Alliance |
| ANCA-ADI | Adirondack North Country Association/Adirondack Diversity Initiative |
| APA | Adirondack Park Agency |
| AWI | Adirondack Watershed Institute |
| BOCES | Boards of Cooperative Educational Services |
| BWG | Broadband Working Group |
| CCE | Cornell Cooperative Extensions |
| CCN | Child Care Networks |
| CCT | Champlain Canalway Trail |
| CDBG | Community Development Block Grant |
| CDC | Community Development Corporations |
| CDRPC | Capital District Regional Planning Commission |
| CSC | Climate Smart Communities |
| DAM | Department of Agriculture and Markets |
| DANC | Development Authority of the North Country |
| DASNY | Dormitory Authority of the State of New York |
| DEC | Department of Environmental Conservation |
| DOH | Department of Health |
| DOL | Department of Labor |
| DOS | Department of State |
| DOT | Department of Transportation |
| E&T | Employment and Training |
| EDA | Economic Development Administration |
| EDO | Economic Development Organizations |
| EFC | Environmental Facilities Corporation |
| ESD | Empire State Development |
| FHWA | Federal Highway Administration |
| FTA | Federal Transit Administration |
| HCR | Housing and Community Renewal |
| HHS | Health and Human Services |
| HMPG | Hazard Mitigation Planning Groups (Counties) |

| | |
|-------------|---|
| HRVG | Hudson River Valley Greenway Program |
| HWG | Housing Working Group |
| IDA | Industrial Development Agencies |
| LCBP | Lake Champlain Basin Program |
| LCLGRP | Lake Champlain - Lake George Regional Planning Board |
| LDC | Local Development Corporations |
| LEPC | Local Emergency Planning Committees |
| | |
| LGRCC & CVB | Lake George Regional Chamber of Commerce & Convention and Visitors Bureau |
| MSAC | Main Street Alliance Communities |
| NAmTrans | North American Center of Excellence for Transportation Equipment |
| NBRC | Northern Border Regional Commission |
| NCCC | North Country Chamber of Commerce |
| NTIA | National Telecommunications and Information Administration |
| NYPA | New York Power Authority |
| NYSEG | New York State Electric & Gas |
| NYSERDA | New York State Energy Research & Development Authority |
| NTG | National Grid |
| OCFS | Office of Children and Family Services |
| OCM | Office of Cannabis Management |
| OPRHP | Office of Parks, Recreation, and Historic Preservation |
| REP | Regional Economic Partnership |
| RTAP | National Rural Transit Assistance Program |
| ROOST | Regional Office of Sustainable Tourism |
| SBA | Small Business Administration |
| SBDC | Small Business Development Centers |
| SUNY | State University of New York |
| SWCD | Soil and Water Conservation Districts |
| TACC | Ticonderoga Area Chamber of Commerce |
| WDB | Workforce Development Boards |

Evaluation Framework

The LCLGRP will track metrics specific to each of the six goals outlined in the CEDS. The LCLGRP anticipates sharing updates on these metrics with regional partners and members to evaluate the advancement of their goals.

| Goal #1 Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities | |
|---|----------------------------------|
| Metrics | Source of Information |
| Number of electric vehicle (EV) charging stations | NYSERDA |
| Percent of broadband coverage | NYS Department of Public Service |
| Awards for water, sewer, or broadband | NTIA, WIIA, EFC, NBRC, EDA, etc. |
| Goal #2 Enhance Quality of Life and Support Vibrant Community Centers | |
| Metrics | Source of Information |
| Population | ACS/Census |
| Occupied housing units | ACS/Census |
| Median household income | ACS/Census |
| Poverty rate | ACS/Census |
| Goal #3 Promote Regional Collaboration and Outreach | |
| Metrics | Source of Information |
| Outreach events held | LCLGRP |
| Goal #4 Support Entrepreneurship & Business Development Opportunities | |
| Metrics | Source of Information |
| Small business loans issued | LCLGRP |
| M/WBE and SDVOB Certifications | NYSED & NYSOGS |
| Number of new businesses engaged | LCLGRP |
| Goal #5 Improve Workforce Readiness | |
| Metrics | Source of Information |
| Labor force participation % | BLS LAUS |
| Unemployment % | BLS LAUS |
| Student enrollment | NYSED |
| Student graduation % | NYSED |
| Economically Disadvantaged Student Enrollment | NYSED |
| Economically Disadvantaged Student Graduation % | NYSED |
| Education attainment | ACS/Census |
| Goal #6 Preserve Natural Resources & Expand Recreational Opportunities | |
| Metrics | Source of Information |
| Acres of farmland conserved | Land Trusts |
| Acres of forestland conserved | Land Trusts |

CEDS Evaluation Metrics

2023 Update

Goal #1 | Develop & Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington |
|--------------------------------|--------------|-------------|-------------|----------|-------------|------------|
| Number of EV Charging Stations | 172 | 26 | 46 | 5 | 91 | 4 |
| Percent Broadband Coverage | 88% | 97% | 85% | 70% | 96% | 94% |
| Awards for Wastewater | 7 | 2 | 3 | 0 | 1 | 1 |
| Value of Awards | \$18,791,738 | \$1,503,949 | \$9,430,909 | \$0 | \$7,630,880 | \$226,000 |

Goal #2 | Enhance Quality of Life & Support Vibrant Community Centers

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington |
|-------------------------------------|-------------|----------|----------|----------|----------|------------|
| Population (2019-2020) | 247,546 | 80,320 | 37,281 | 4,454 | 64,187 | 61,304 |
| % Change | -0.4% | -0.3% | -0.5% | -1.4% | -0.1% | -0.5% |
| Occupied Housing Units (2019-2020) | 102,243 | 31,557 | 16,182 | 1,416 | 29,034 | 24,054 |
| % Change | 2.0% | 0.8% | 2.5% | 22.4% | 3.6% | 0.2% |
| Median Household Income (2019-2020) | \$60,503 | \$59,510 | \$58,109 | \$60,625 | \$64,658 | \$59,613 |
| % Change | 4.3% | 5.6% | 2.4% | 3.3% | 6.0% | 4.1% |
| Poverty Rate (2019-2020) | 10.1% | 12.3% | 10.1% | 8.6% | 8.5% | 10.9% |
| % Change | -9.4% | -18.0% | 2.0% | -13.1% | -10.5% | -3.5% |

CEDS Evaluation Metrics

2023 Update

Goal #3 | Promote Regional Collaboration & Outreach

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington | Online |
|----------------------|-------------|---------|-------|----------|--------|------------|--------|
| Outreach Events Held | 28 | 3 | 4 | 3 | 5 | 6 | 7 |

Goal #4 | Support Entrepreneurship & Business Development Opportunities

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington | Other Counties |
|---|-------------|---------|-------|----------|--------|------------|----------------|
| Small Business Loans Issued | 17 | 1 | 4 | 0 | 9 | 1 | 2 |
| Number of New Business Engaged | 30 | 3 | 5 | 2 | 11 | 2 | 7 |
| Total MWBE and SDVOB Certifications | 95 | 29 | 28 | 0 | 31 | 7 | |
| Minority-Owned Business (MBE) | 5 | 3 | 0 | 0 | 2 | 0 | |
| Woman-Owned Business (WBE) | 73 | 21 | 22 | 0 | 23 | 7 | |
| Service Disabled Veteran Owned Business (SDVOB) | 23 | 3 | 5 | 2 | 11 | 2 | |

CEDS Evaluation Metrics

2023 Update

Goal #5 | Improve Workforce Readiness

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington |
|--|-------------|---------|--------|----------|--------|------------|
| Labor Force Participation | 48.0% | 43.7% | 48.2% | 52.8% | 49.0% | 46.3% |
| % Change (2021-2022) | 2.0% | 0.9% | 2.6% | 8.0% | -0.4% | -1.1% |
| Unemployment | 3.2% | 3.8% | 3.1% | 2.6% | 3.2% | 3.2% |
| % Change (2021-2022) | -20.9% | -15.6% | -24.4% | -18.8% | -23.8% | -22.0% |
| High School Diploma or Higher | 87.6% | 88.0% | 90.5% | 79.5% | 92.1% | 88.0% |
| % Change (2019-2020) | 0.4% | 0.5% | -1.1% | 2.6% | 0.2% | 0.1% |
| Bachelor's Degree or Higher | 25.3% | 24.4% | 29.8% | 19.9% | 32.3% | 20.2% |
| % Change (2019-2020) | 7.0% | 6.6% | 11.2% | 18.5% | 3.2% | -1.5% |
| Total Student Enrollment | 29,882 | 10,314 | 3,423 | 379 | 8,058 | 7,708 |
| % Change (2020-2021) | -2.5% | -1.9% | -0.1% | 5.6% | -3.0% | -4.1% |
| Percent Economically Disadvantaged Students | 47.2% | 47.0% | 53.0% | 44.0% | 43.0% | 49.0% |
| % Change (2020-2021) | -2.1% | -4.1% | 0.0% | -8.3% | -2.3% | 4.3% |
| Overall Student Graduation Rate | 88.2% | 87.0% | 91.0% | 84.0% | 85.0% | 84.0% |
| % Change (2020-2021) | 1.1% | -1.1% | 1.1% | 8.0% | -4.5% | 2.4% |
| Economically Disadvantaged Student Graduation Rate | 78.4% | 78.0% | 85.0% | 87.0% | 70.0% | 72.0% |
| % Change (2020-2021) | -1.3% | 1.3% | -3.4% | 8.7% | -11.4% | -1.4% |

Goal #6 | Preserve Natural Resources & Expand Recreational Opportunities

| | LCLG Region | Clinton | Essex | Hamilton | Warren | Washington |
|---------------------------|-------------|---------|--------|----------|--------|------------|
| Farmland Conserved (Ac) | 196 | 0 | 0 | 0 | | 196 |
| Forestland Conserved (Ac) | 176.83 | 0 | 106.83 | 0 | 10 | 60 |

Conclusion

With support from its partners, the LCLGRPБ intends to implement the vision, goals, and strategies outlined in the 2022-2027 CEDS. The priorities activities outlined in the Action Plan have the potential to bring greater economic opportunities to the LCLG Region and its communities.

As the LCLGRPБ moves towards implementation, it will be guided by the economic resilience principles developed through the *Forward Together: Economic Resiliency Plan* and regular interactions with local and regional economic development organizations.

References

- ⁱ Government of Canada, S. C. (2017, March 30). *Population size and growth in Canada: Key results from the 2016 census*. The Daily - . Retrieved December 22, 2021, from <https://www150.statcan.gc.ca/n1/daily-quotidien/170208/dq170208a-eng.htm>
- ⁱⁱ NCEI.Monitoring.info@noaa.gov. (n.d.). *Climate at a glance*. National Climatic Data Center. Retrieved from <https://www.ncdc.noaa.gov/cag/county/mapping>
- ⁱⁱⁱ Cameron Wobus, Eric E. Small, Heather Hosterman, David Mills, Justin Stein, Matthew Rissing, Russell Jones, Michael Duckworth, Ronald Hall, Michael Kolian, Jared Creason, Jeremy Martinich, Projected climate change impacts on skiing and snowmobiling: A case study of the United States, *Global Environmental Change*, Volume 45, 2017, Pages 1-14, ISSN 0959-3780, <https://doi.org/10.1016/j.gloenvcha.2017.04.006>. (<https://www.sciencedirect.com/science/article/pii/S0959378016305556>)
- ^{iv} NCEI.Monitoring.info@noaa.gov. (n.d.). *Climate at a glance*. National Climatic Data Center. Retrieved from <https://www.ncdc.noaa.gov/cag/county/mapping>
- ^v *FEMA web declaration areas - V1*. FEMA Web Declaration Areas - v1 | FEMA.gov. (n.d.). Retrieved from <https://www.fema.gov/openfema-data-page/fema-web-declaration-areas-v1>
- ^{vi} *Adirondack Park Agency*. Adirondack Park Agency Maps and GIS. (n.d.). Retrieved from <https://apa.ny.gov/gis/index.html#Stats>
- ^{vii} 2020 Decennial U.S. Census, U.S. Census Bureau
- ^{viii} 2019 American Community Survey (ACS), U.S. Census Bureau
- ^{ix} 2020 Decennial U.S. Census, U.S. Census Bureau
- ^x 2019 American Community Survey (ACS), U.S. Census Bureau
- ^{xi} 2020 Decennial U.S. Census, U.S. Census Bureau
- ^{xii} 2019 American Community Survey (ACS), U.S. Census Bureau
- ^{xiii} New York State Department of Education (NYSED), 2013-2014 and 2019-2020 school years
- ^{xiv} New York State Department of Education (NYSED), 2013-2014 and 2019-2020 school years
- ^{xv} New York State Department of Education (NYSED), 2013-2014 and 2019-2020 school years
- ^{xvi} Local Area Unemployment Statistics (LAUS), U.S. Bureau of Labor Statistics (BLS)
- ^{xvii} Local Area Unemployment Statistics (LAUS), U.S. Bureau of Labor Statistics (BLS)
- ^{xviii} Quarterly Census of Employment and Wages (QCEW), U.S. Bureau of Labor Statistics (BLS)
- ^{xix} Emsi (2020)
- ^{xx} Emsi (2020)
- ^{xxi} Emsi (2020)

Appendix A



2022-2027 Comprehensive Economic Development Strategy (CEDS)

SUMMARY BACKGROUND

September 2021

Contents



Photo Credit: visitlakegeorge.com

1. [Demographic & Socioeconomic Profile](#)
2. [Industry Analysis](#)
3. [Agricultural Snapshot](#)
4. [Talent & Workforce Evaluation](#)
5. [Environmental & Cultural Resources](#)
6. [Municipal Information](#)

Summary Background: Contents Overview

- Demographic and socioeconomic data
- Environmental, geographic, climatic, and cultural
- Infrastructure assets
- Emerging/declining clusters or industry sectors
- Relationship of area economy to larger region/state
- Factors that directly affect economic performance
 - E.g., workforce, laws, transportation, taxes, bonding capacity, land-use
- Other factors that relate to economic performance
 - E.g., housing, healthcare, education, culture, recreation, public safety

EDA Investment Priorities

1. Equity
2. Recovery & Resilience
3. Workforce Development
4. Manufacturing
5. Technology-Based Economic Development
6. Environmentally-Sustainable Development
7. Exports & Foreign Direct Investment (FDI)

Demographic & Socioeconomic Profile



Photo Credit: ROOST Adk

Demographic Summary

- The population of the LCLG Region declined by 2% since the 2010 Census. This trend is significantly lower than that of New York State (4% growth) and the United States (8% growth).
- While New York and the United States saw slight increases in median age, the 2019 median age for the LCLG Region (46.7 years) is substantially higher than that of NYS (38.8) and US (38.1).
- Average household size for the LCLG Region grew by 9% since 2010. This trend is inconsistent with that of New York State and the United States, which both saw decreases in average household size.
- While median household income for the LCLG Region has increased to \$53,004 in 2019. The regional MHI is approximately \$16,000 less than that of NYS and \$10,000 less than national median.

| Demographic Summary | | | | | | | | |
|-----------------------------------|-------------|-------------|----------|-------------|--------------------|--------------------|--------------------|--------------------|
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change |
| Lake Champlain Lake George Region | | | | | | | | |
| Population | 248,469 | 255,257 | | 249,370 | 0.4% | -2.3% | | |
| Population Density | 39.7 | 40.8 | | 39.8 | 0.4% | -2.3% | | |
| Median Age | 39.5 | 44.1 | 46.7 | | | | 18.3% | 5.9% |
| Average Household Size | 2.41 | 2.31 | 2.60 | | | | 7.8% | 12.7% |
| Median Household Income | \$36,141 | \$48,442 | \$53,004 | | | | 46.7% | 9.4% |
| New York State | | | | | | | | |
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change |
| Population | 18,976,457 | 19,378,102 | | 20,201,249 | 6% | 4% | | |
| Population Density | 401.9 | 410.4 | | 427.9 | 6% | 4% | | |
| Median Age | 36.0 | 38 | 38.8 | | | | 7.8% | 2.1% |
| Average Household Size | 2.61 | 2.61 | 2.59 | | | | -0.8% | -0.8% |
| Median Household Income | \$43,393 | \$55,603 | \$68,846 | | | | 58.7% | 23.8% |
| United States | | | | | | | | |
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change |
| Population | 281,421,906 | 308,745,538 | | 332,915,073 | 18% | 8% | | |
| Population Density | 79.6 | 87.3 | | 94.1 | 18% | 8% | | |
| Median Age | 35.4 | 37.2 | 38.1 | | | | 7.6% | 2.4% |
| Average Household Size | 2.59 | 2.63 | 2.62 | | | | 1.2% | -0.4% |
| Median Household Income | \$41,994 | \$51,914 | \$62,843 | | | | 49.6% | 21.1% |

Source: Decennial US Census, American Community Survey

Demographic Summary, by County

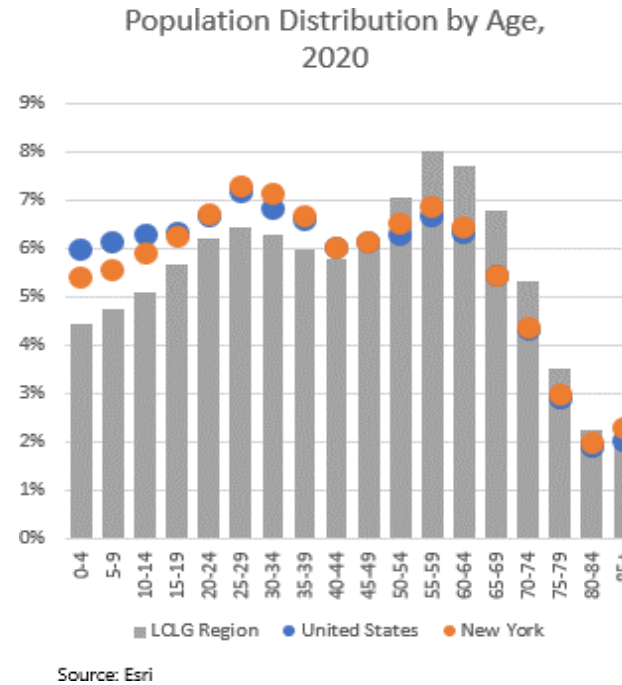
Demographic Summary - Lake Champlain Lake George Region County Detail

| Clinton County | | | | | | | | | Warren County | | | | | | | | |
|-------------------------|----------|----------|----------|--------|-----------------------|-----------------------|-----------------------|-----------------------|-------------------------|----------|----------|----------|--------|-----------------------|-----------------------|-----------------------|-----------------------|
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change | | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change |
| Population | 79894 | 82128 | | 79483 | -0.5% | -3.2% | | | Population | 63303 | 65707 | | 65,737 | 3.8% | 0.0% | | |
| Population Density | 76.9 | 79.0 | | 76.5 | -0.5% | -3.2% | | | Population Density | 72.8 | 75.6 | | 75.6 | 3.8% | 0.0% | | |
| Median Age | 35.7 | 39.1 | 39.5 | | | | 11% | 1% | Median Age | 39.0 | 44.1 | 46.8 | | | | | |
| Average Household Size | 2.47 | 2.37 | 2.33 | | | | -6% | -2% | Average Household Size | 2.41 | 2.32 | 2.26 | | | | -6% | -3% |
| Median Household Income | \$37,028 | \$47,489 | \$56,365 | | | | 52% | 19% | Median Household Income | \$39,198 | \$51,619 | \$61,024 | | | | 56% | 18% |
| Essex County | | | | | | | | | Washington County | | | | | | | | |
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change | Washington County | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change |
| Population | 38851 | 39370 | | 37,381 | -3.8% | -5.1% | | | Population | 61042 | 63216 | | 61,302 | 0.4% | -3.0% | | |
| Population Density | 21.6 | 21.9 | | 20.8 | -3.8% | -5.1% | | | Population Density | 73.1 | 75.7 | | 73.4 | 0.4% | -3.0% | | |
| Median Age | 39.4 | 44.5 | 47.7 | | | | 21% | 7% | Median Age | 37.5 | 41.7 | 44.2 | | | | 18% | 6% |
| Average Household Size | 2.39 | 2.26 | 2.19 | | | | -8% | -3% | Average Household Size | 2.55 | 2.49 | 2.43 | | | | -5% | -2% |
| Median Household Income | \$34,823 | \$45,216 | \$56,763 | | | | 63% | 26% | Median Household Income | \$37,668 | \$48,327 | \$57,258 | | | | 52% | 18% |
| Hamilton County | | | | | | | | | | | | | | | | | |
| | 2000 | 2010 | 2019* | 2020 | 2000-2020 % Change | 2010-2020 % Change | 2000-2019 % Change | 2010-2019 % Change | | | | | | | | | |
| Population | 5379 | 4836 | | 5,107 | -5.1% | 5.6% | | | | | | | | | | | |
| Population Density | 3.1 | 2.8 | | 3.0 | -5.1% | 5.6% | | | | | | | | | | | |
| Median Age | 45.4 | 51.3 | 55.3 | | | | 22% | 8% | | | | | | | | | |
| Average Household Size | 2.24 | 2.10 | 3.79 | | | | 69% | 80% | | | | | | | | | |
| Median Household Income | \$32,287 | \$49,557 | \$56,675 | | | | 76% | 14% | | | | | | | | | |

Source: Decennial US Census, American Community Survey

Population Characteristics

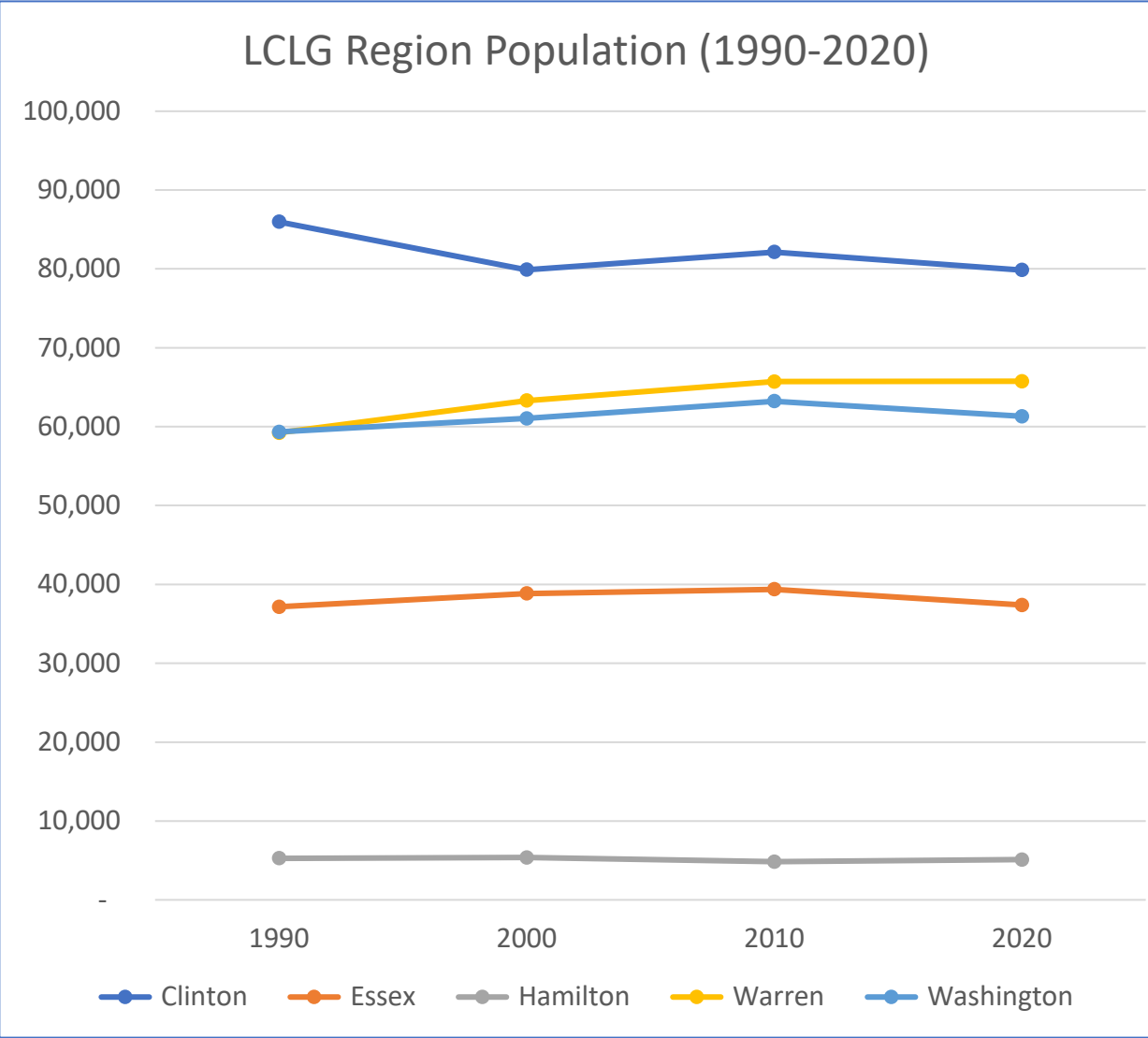
- A larger portion of the LCLG Region's population is in the 50-79 age cohort compared to the state and the nation.
- The LCLG Region's population has a smaller share of population of 18 and younger compared to New York and the U.S. (17.4% vs. 20.4% and 22%, respectively), a similar share of working-age 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%.



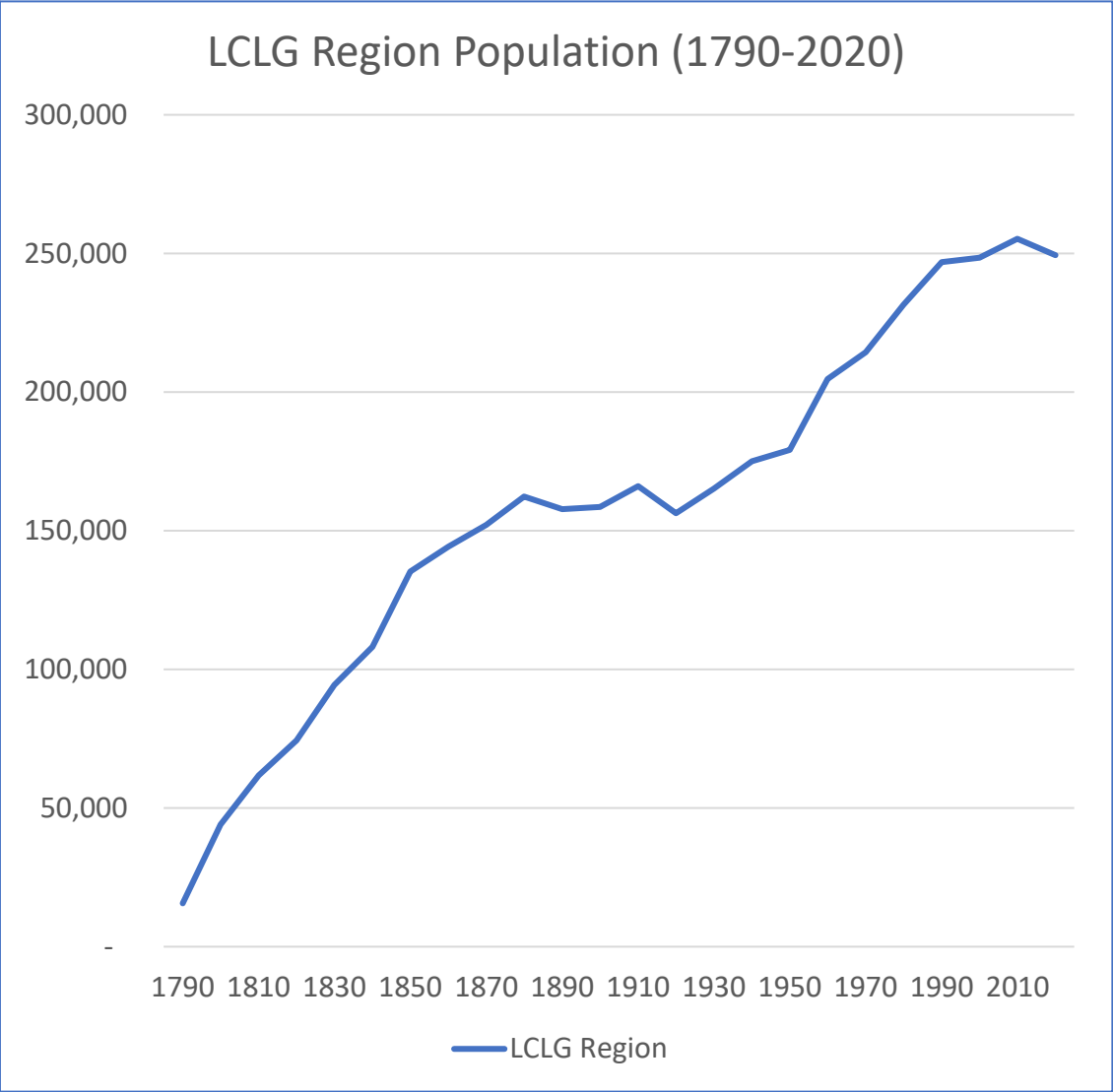
| Population by Age Cohort, 2020 | | | | | | | |
|--------------------------------|---------------|--------------|----------------|--------------|-----------------|---------------|-------------------|
| Age | United States | New York | Clinton County | Essex County | Hamilton County | Warren County | 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% |
| Total Age <18 | 22.0% | 20.4% | 16.8% | 17.3% | 13.9% | 17.6% | 18.4% |
| Total Age 18+ | 78.0% | 79.6% | 83.2% | 82.8% | 86.1% | 82.4% | 81.6% |
| Total Age 18-65 | 61.4% | 62.5% | 65.7% | 59.5% | 57.8% | 60.0% | 62.1% |
| Total Age 65+ | 16.6% | 17.1% | 17.5% | 23.3% | 28.3% | 22.4% | 19.5% |

Source: Esri

Regional Population Change

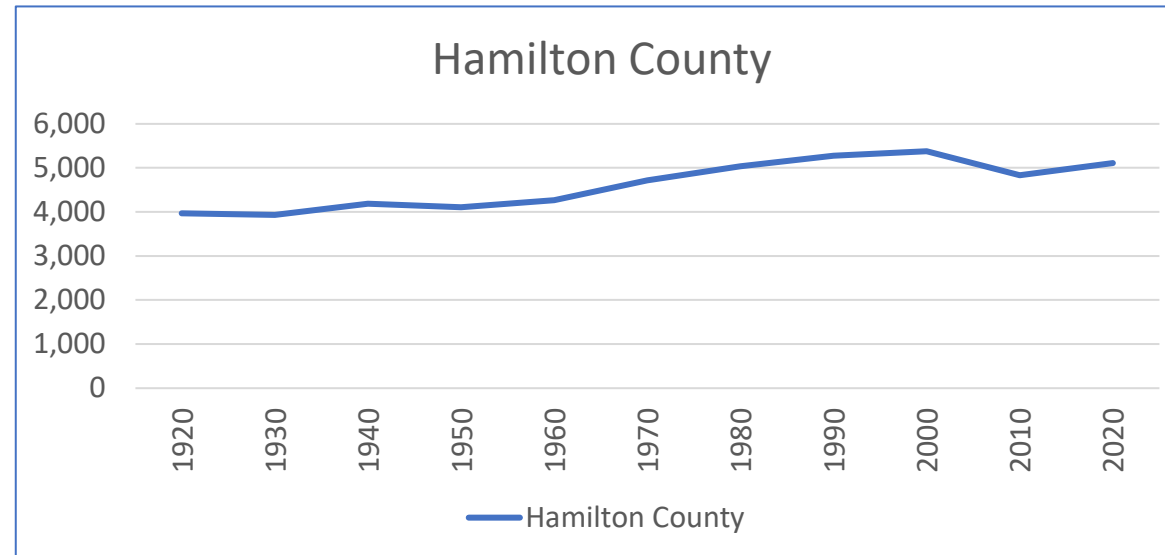
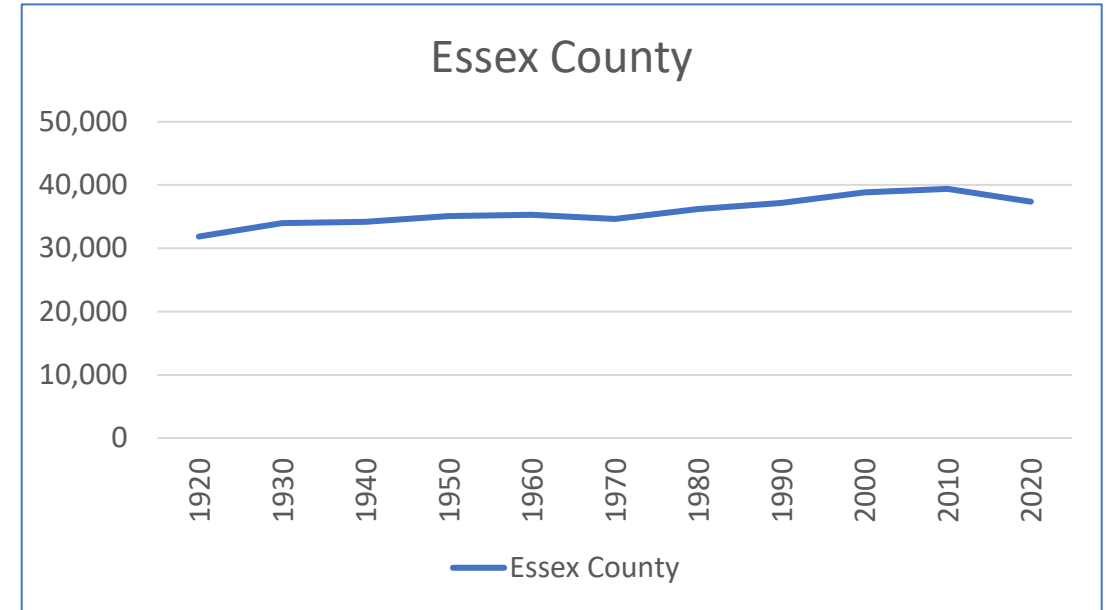
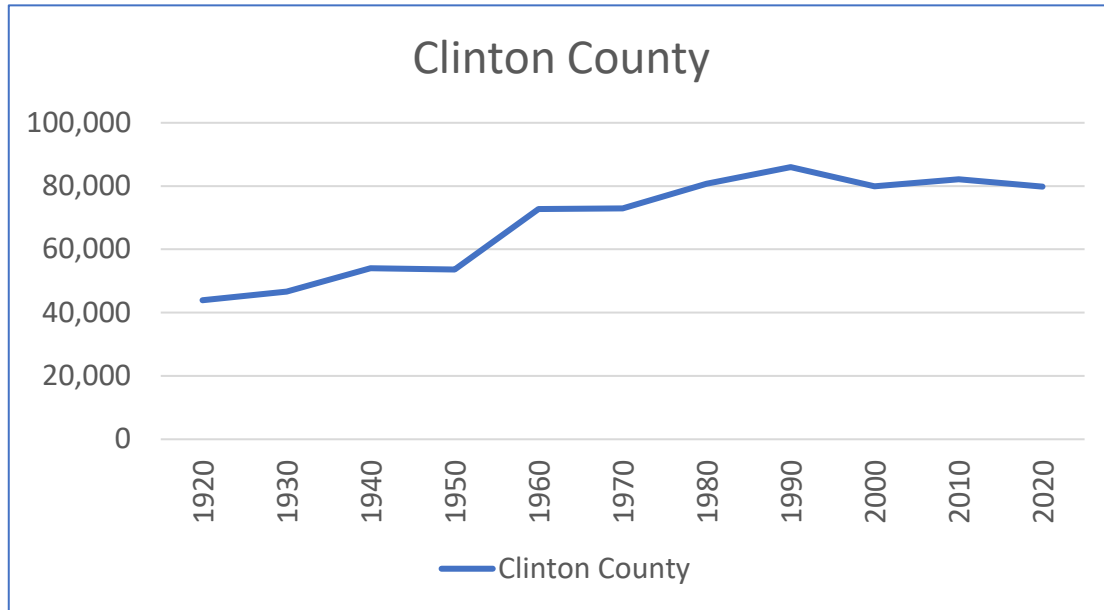


Source: Decennial US Census

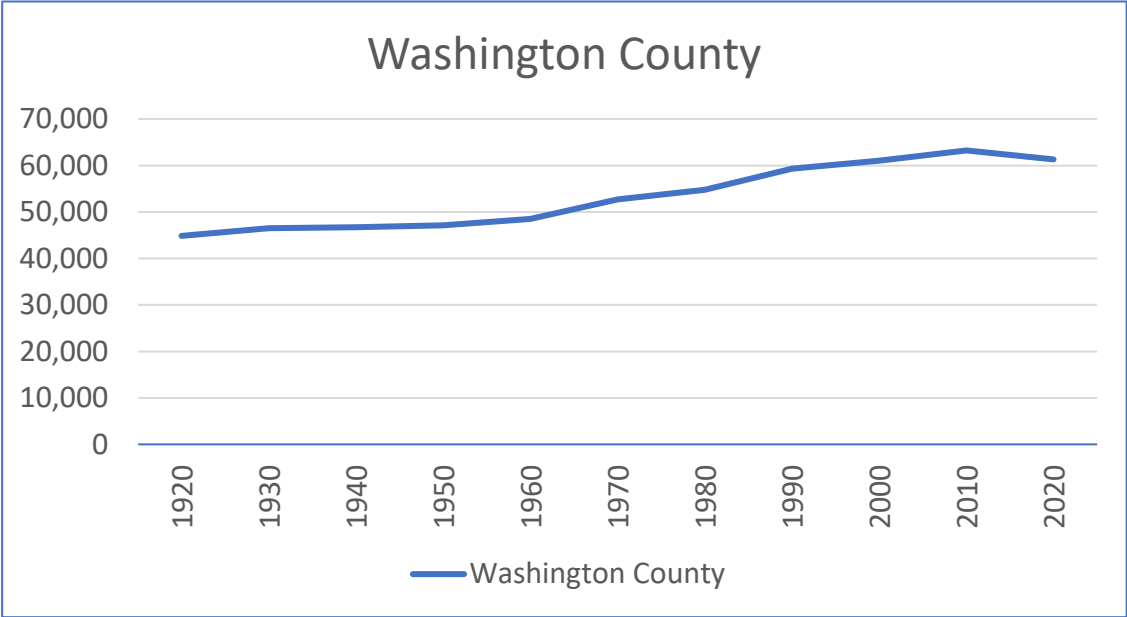
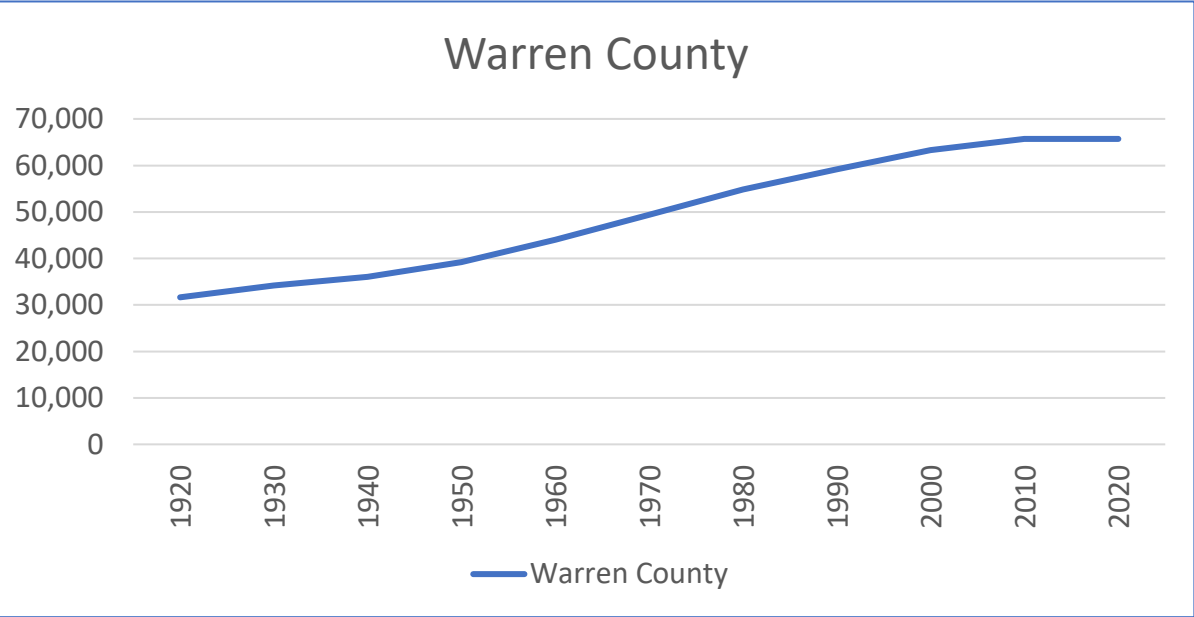


Source: Decennial US Census

County Population Over Time (through 2020)



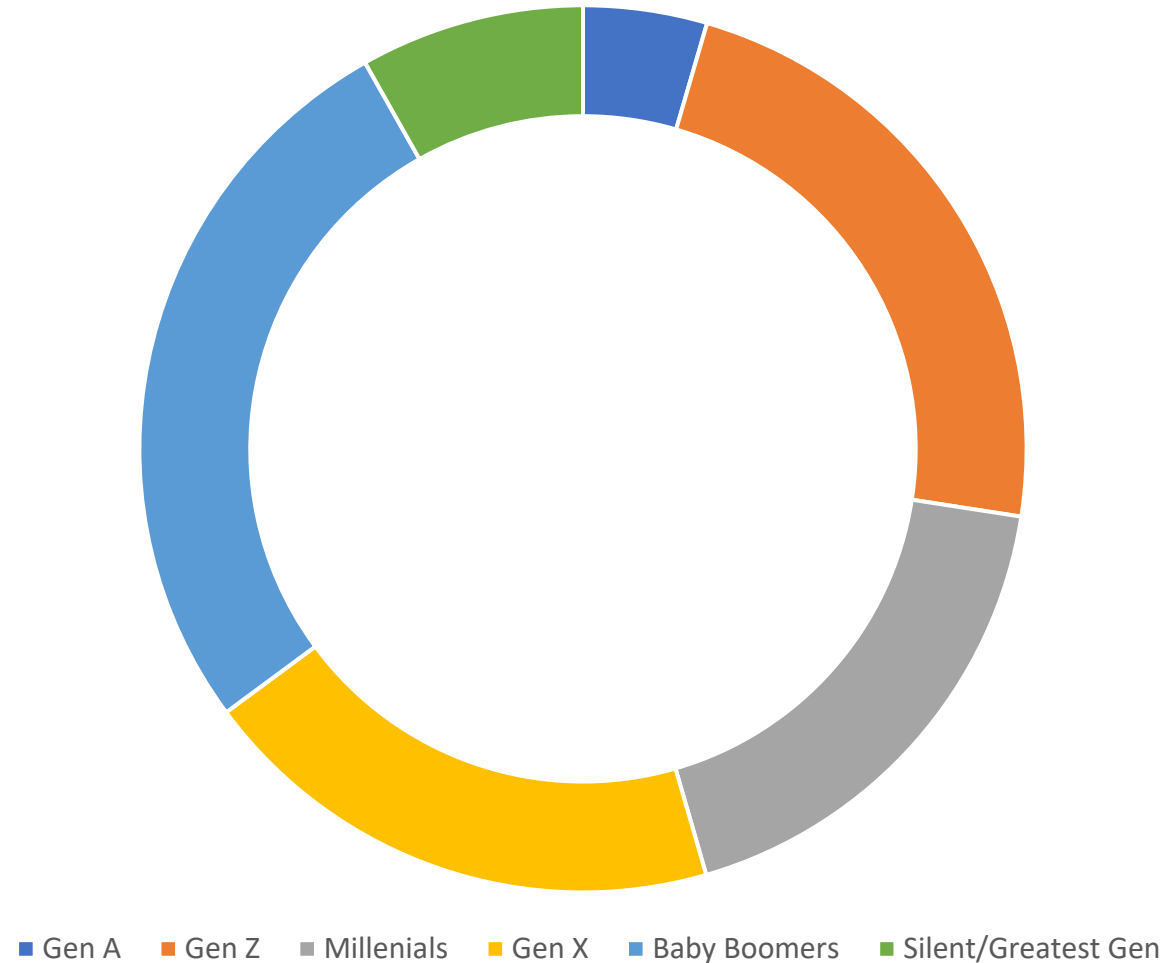
County Population Over Time (through 2020)



Demographic Profile: Age

- To determine the generational cohort, the following assumptions were made:
 - Age in 2019
 - Generation A (0-4 years)
 - Generation Z (5-24 years)
 - Millennials (25-39 years)
 - Generation X (40-54 years)
 - Baby Boomers (55-74 years)
 - Silent/Greatest Generation (75+ years)
- In 2019, the LCLG Region's largest generational cohorts were:
 1. Baby Boomers (27%)
 2. Generation Z (23%)
 3. Generation X (19%)
- The age demographic trends in the LCLG Region differ from New York and national trends:
 - New York State
 1. Generation Z (24%)
 2. Baby Boomers (22%)
 3. Millennials (21%)
 - United States
 1. Generation Z (26%)
 2. Baby Boomers (22%)
 3. Millennials (20%)

LCLG Region Distribution of Age by Generation

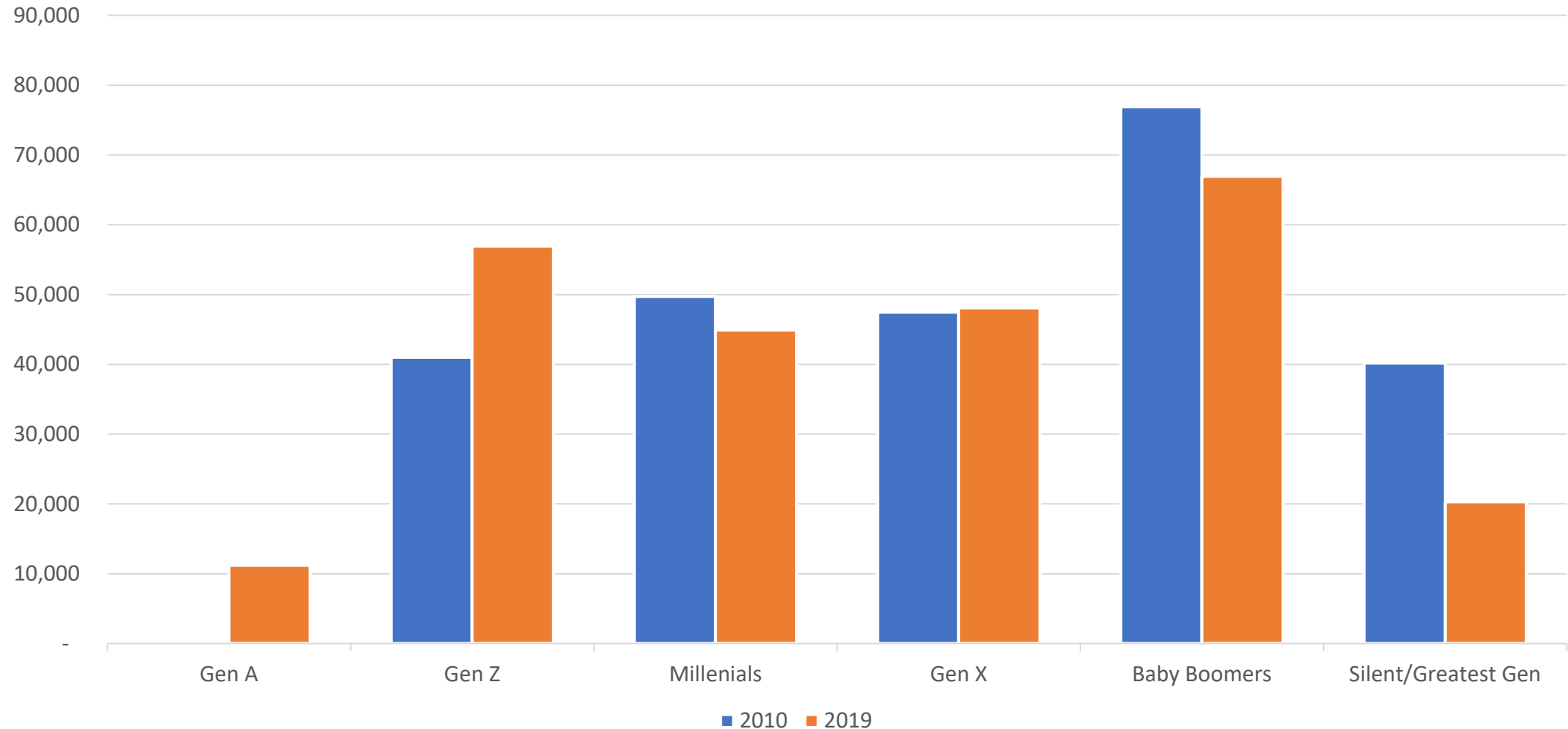


Source: American Community Survey

*Note: 2019 age data was used for this document, as the 2020 Census age data has not yet been released.

Demographic Profile: Age

LCLG Region Distribution of Age by Generation



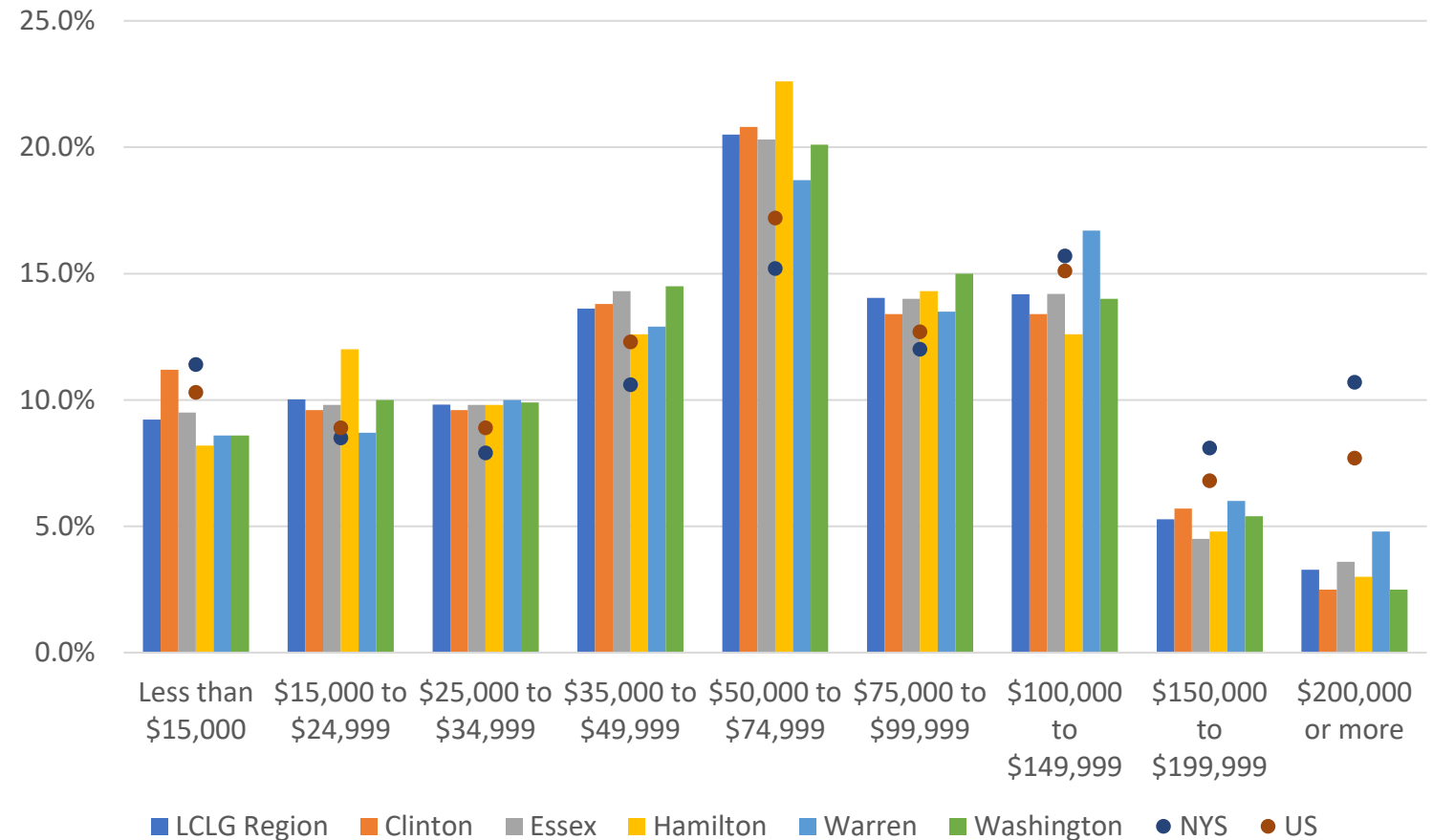
Source: Decennial US Census, American Community Survey

*Note: 2019 age data was used for this document, as the 2020 Census age data has not yet been released.

Household Income

- Household incomes are lower in the LCLG Region than the state and nation.
- New York State and the United States have a higher share of households with incomes over \$100,000.
- Median household incomes (MHI) is similar across the five counties, with MHI ranging from about \$56,000 in Clinton County to approximately \$61,000 in Warren County. MHI in New York is about \$68,500 and the MHI in the United States is about \$63,000.

Household Income Distribution, 2019



Median Household Income, 2019

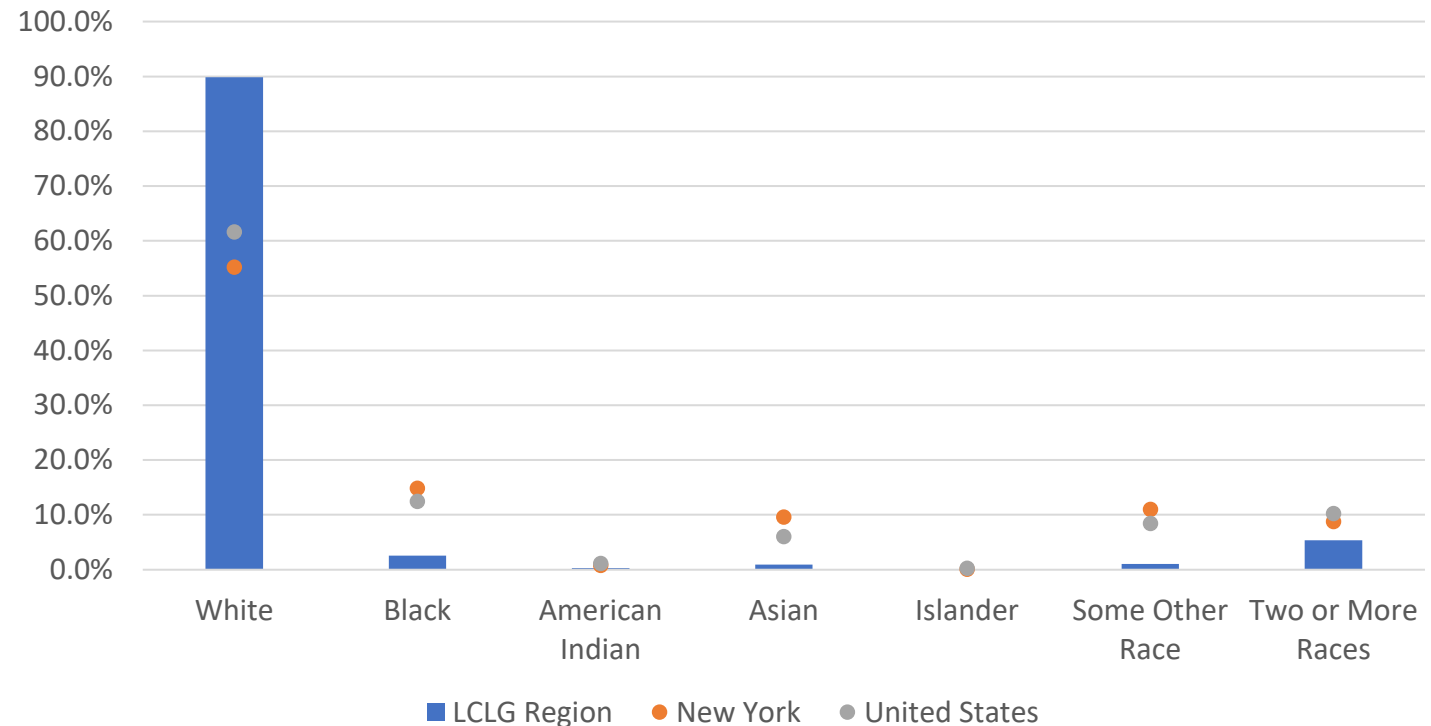
| | Clinton | Essex | Hamilton | Warren | Washington | LCLG Region | NYS | US |
|--------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Median Household Income | \$56,365 | \$56,763 | \$58,675 | \$61,024 | \$57,258 | \$58,017 | \$68,486 | \$62,843 |

Source: American Community Survey

Race

- The majority of the LCLG Region's population is white (90%). Compared to the state and nation the region is less racially diverse.
- The second largest racial demographic in the LCLG Region is individuals identifying as *Two or More Races* (5.4%). The third largest race in the LCLG Region is Black/African Americans, representing 2.5% of the population.
- The region has generally experienced increases in racial diversity since the 2010 Census.
 - Percent Change (2010-2020)
 - White: -7%
 - Black: -8%
 - American Indian: +4%
 - Asian: +20%
 - Pacific Islanders: +19%
 - Some Other Race: +69%
 - Two or More Races: +306%

Population by Race, 2020



Population by Race, 2020

| Race | Clinton | Essex | Hamilton | Warren | Washington |
|-------------------|---------|-------|----------|--------|------------|
| White | 87.8% | 91.2% | 93.7% | 91.1% | 90.0% |
| Black | 3.8% | 1.8% | 0.6% | 1.2% | 2.8% |
| American Indian | 0.4% | 0.2% | 0.3% | 0.3% | 0.3% |
| Asian | 1.2% | 0.6% | 0.2% | 1.1% | 0.5% |
| Islander | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Some Other Race | 1.3% | 0.8% | 0.4% | 0.8% | 1.1% |
| Two or More Races | 5.4% | 5.3% | 4.7% | 5.5% | 5.2% |

Race: 2020 and Change Over Time

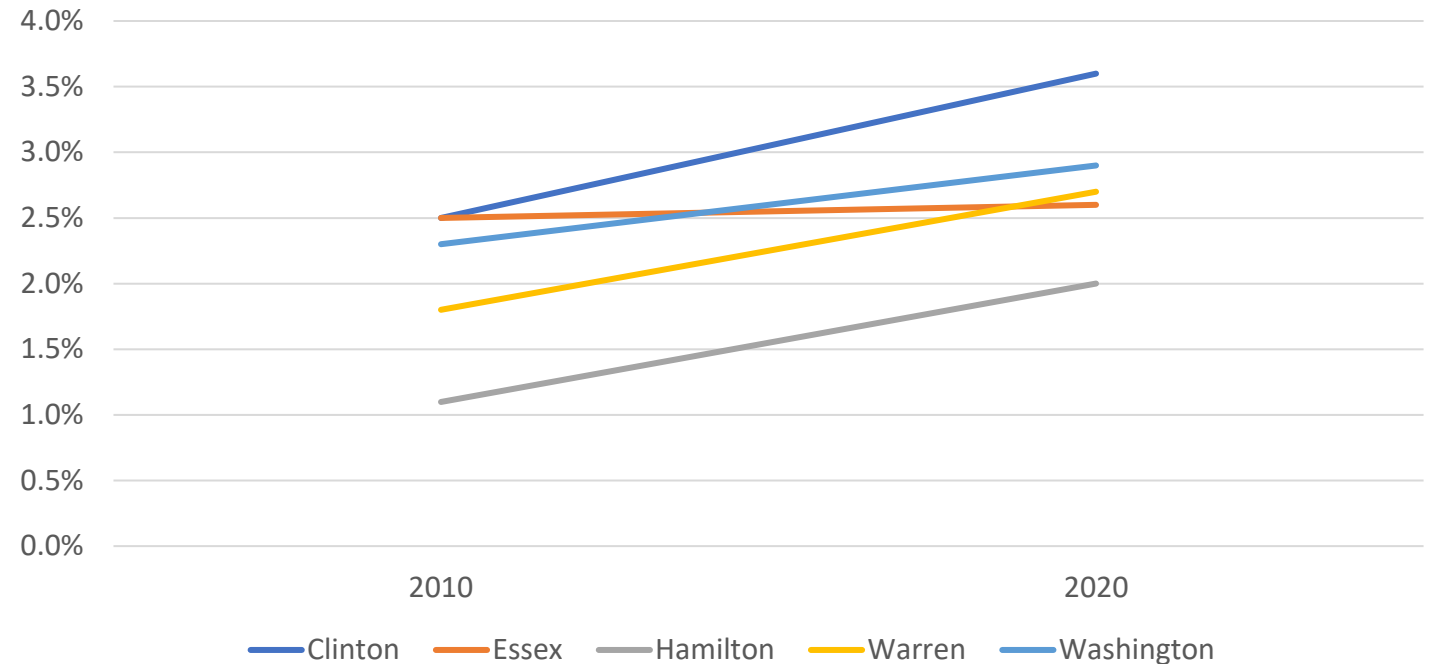
- The racial composition of the LCLG Region is predominately White. However, compared to the 2010 Census, the LCLG Region saw increases in racial diversity, especially among residents identifying as *Some Other Race* and *Two or More Races*.

| | White | Black | American Indian | Asian | Pacific Islander | Some Other Race | Two or More Races |
|------------------|---------|--------|-----------------|--------|------------------|-----------------|-------------------|
| Clinton | 70,142 | 3,060 | 285 | 975 | 26 | 1,010 | 4,345 |
| 10-Year % Change | -7.7% | -4.6% | -0.3% | 8.6% | 36.8% | 87.0% | 268.5% |
| Essex | 34,102 | 676 | 78 | 229 | 12 | 306 | 1,978 |
| 10-Year % Change | -8.1% | -37.0% | -38.1% | -12.9% | 33.3% | -4.4% | 312.9% |
| Hamilton | 4,785 | 31 | 14 | 12 | 1 | 22 | 242 |
| 10-Year % Change | 1.7% | -11.4% | 27.3% | -50.0% | -75.0% | 450.0% | 356.6% |
| Warren | 59,911 | 799 | 170 | 753 | 1 | 497 | 3,606 |
| 10-Year % Change | -5.5% | 35.4% | 18.1% | 65.1% | -87.5% | 138.9% | 296.3% |
| Washington | 55,162 | 1,715 | 174 | 326 | 23 | 703 | 3,199 |
| 10-Year % Change | -7.8% | -9.4% | 35.9% | 22.6% | 76.9% | 62.7% | 378.2% |
| LCLG Region | 224,102 | 6,281 | 721 | 2,295 | 63 | 2,538 | 13,370 |
| 10-Year % Change | -7.0% | -7.6% | 3.7% | 20.3% | 18.9% | 68.8% | 306.4% |

Hispanic Ethnicity

- The percentage of residents identifying as Hispanic or Latino is significantly lower than state and national trends, 20% and 19% respectively. However, since the 2010 Census, the LCLG Region gained 1,725 Hispanic or Latino residents, increasing the percentage from 2.2% to 3%.
- The largest gain in Hispanic or Latino residents was in Clinton County (802 residents), followed by Warren County (574 residents).

Hispanic or Latino Ethnicity, 2010-2020



Hispanic or Latino Ethnicity, 2020

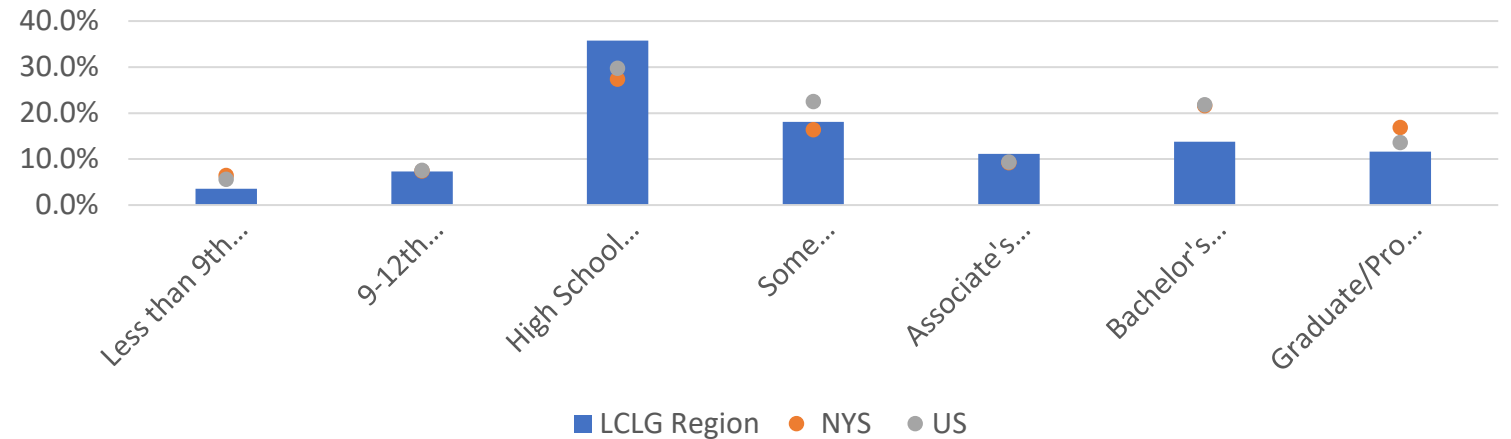
| | Clinton | Essex | Hamilton | Warren | Washington | LCLG Region | NYS | US |
|------|---------|-------|----------|--------|------------|-------------|-------|-------|
| 2020 | 3.6% | 2.6% | 2.0% | 2.7% | 2.9% | 3.0% | 19.5% | 18.7% |

Source: Decennial US Census

Educational Attainment: 2019

- Compared to NYS and the nation, the LCLG Region has a smaller share of residents who hold at least a Bachelor's degree (25%, versus 39% in NYS and 36% nationwide)
- Educational attainment is highest in Warren County, where 32% of residents possess at least a Bachelor's degree.

Educational Attainment: 2019



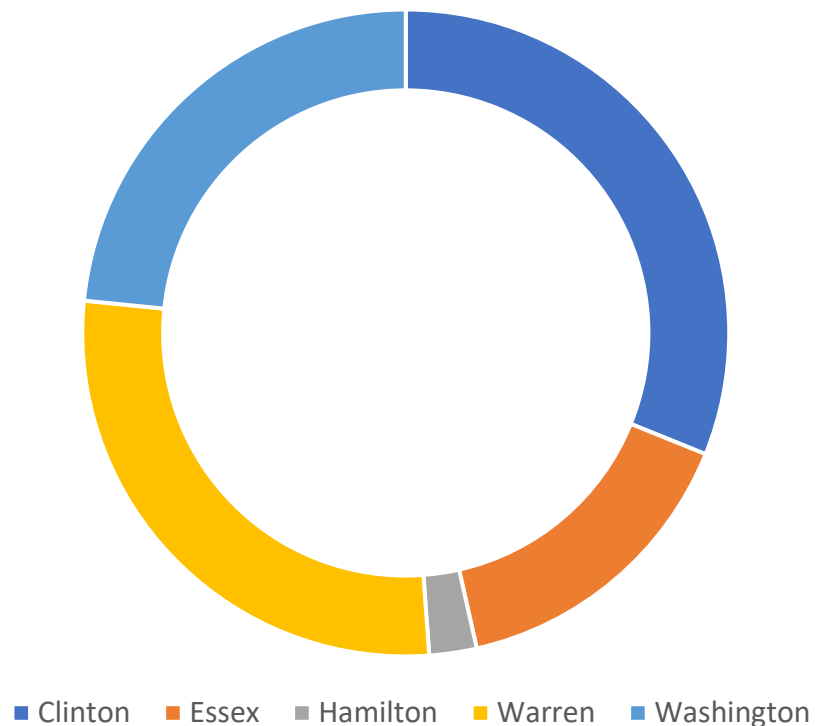
Educational Attainment of Population age 25+ (2019)

| Educational Attainment (25+) | Clinton County | Essex County | Hamilton County | Warren County | Washington County | LCLG Region | New York | United States |
|--|----------------|--------------|-----------------|---------------|-------------------|--------------|--------------|---------------|
| Less than 9th Grade | 4.1% | 2.5% | 3.3% | 2.5% | 4.5% | 3.5% | 6.5% | 5.6% |
| 9-12th Grade/No Diploma | 8.2% | 6.1% | 17.7% | 5.7% | 7.9% | 7.3% | 7.4% | 7.6% |
| High School Diploma/GED | 37.7% | 34.6% | 25.3% | 31.4% | 39.8% | 35.8% | 27.4% | 29.8% |
| Some College/No Degree | 17.0% | 18.5% | 21.1% | 19.1% | 18.0% | 18.1% | 16.4% | 22.6% |
| Associate's Degree | 10.1% | 11.9% | 10.1% | 11.6% | 11.4% | 11.1% | 9.2% | 9.4% |
| Bachelor's Degree | 12.0% | 15.1% | 8.5% | 17.1% | 12.0% | 13.8% | 21.7% | 21.9% |
| Graduate/Professional Degree | 10.9% | 11.9% | 7.2% | 15.0% | 9.0% | 11.6% | 16.9% | 13.7% |
| High School/Equivalent or Higher (includes GED) | 87.7% | 92.0% | 72.2% | 94.2% | 90.2% | 90.4% | 91.6% | 97.2% |
| Bachelor's Degree or Higher | 22.9% | 27.0% | 15.7% | 32.1% | 21.1% | 25.3% | 38.6% | 35.5% |

Housing Units

Occupied Housing Units, 2020

- Overall, the LCLG Region saw increases in the occupied housing units (2% increase) and a 3% decrease in the number of vacant housing units. These trends are consistent with trends in New York State.
- The largest percentage of occupied housing units can be found in Clinton County (31%) followed by Warren County (28%).



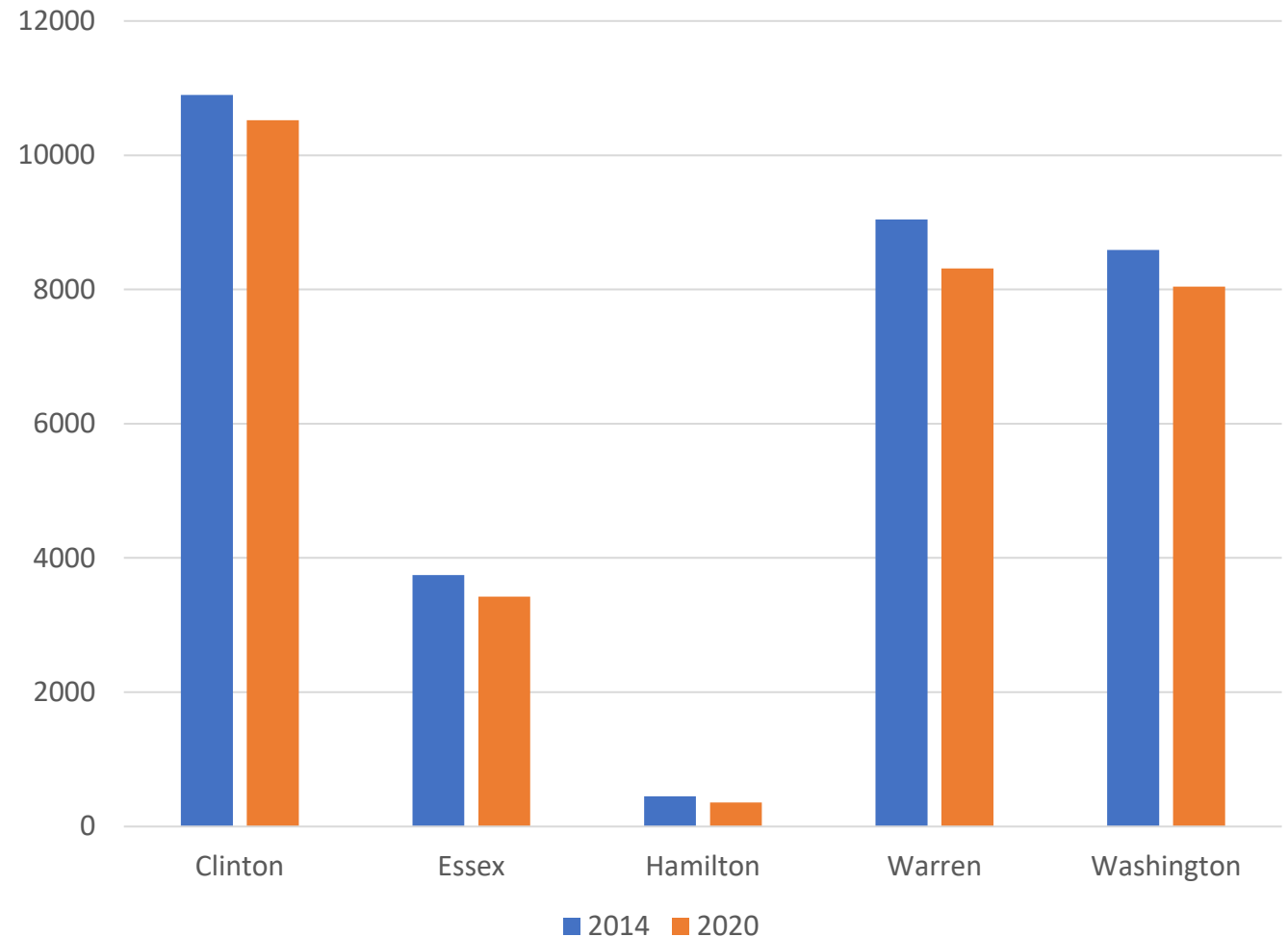
Housing Occupancy/Vacancy, 2010-2020

| | Clinton | | Essex | | Hamilton | | Warren | | Washington | | LCLG Region | NYS |
|----------------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|------------|--------|-------------|-----------|
| | 10-year % | Change | 10-year % | Change | 10-year % | Change | 10-year % | Change | 10-year % | Change | 10-year % | Change |
| Occupied, 2020 | 32,583 | 3% | 16,088 | -1% | 2,478 | 10% | 29,064 | 4% | 24,510 | 2% | 104,723 | 7,715,172 |
| Vacant, 2020 | 4,732 | 10% | 9,035 | -3% | 5,348 | -17% | 10,864 | 1% | 4,488 | -5% | 34,467 | 772,894 |
| Total, 2020 | 37,315 | | 25,123 | | 7,826 | | 39,928 | | 28,998 | | 139,190 | 8,488,066 |

Education: School Enrollment

- In 2020, a total of 30,654 students were enrolled in schools throughout the LCLG Region.
- Since 2014, student enrollment throughout the LCLG Region have seen declines that on average are double (-6%) that of declines experienced statewide (-3%).
- The largest decrease in student enrollment was in Warren County (-732 students), followed by Washington County (-547 students).

School Enrollment (2014 vs. 2020)

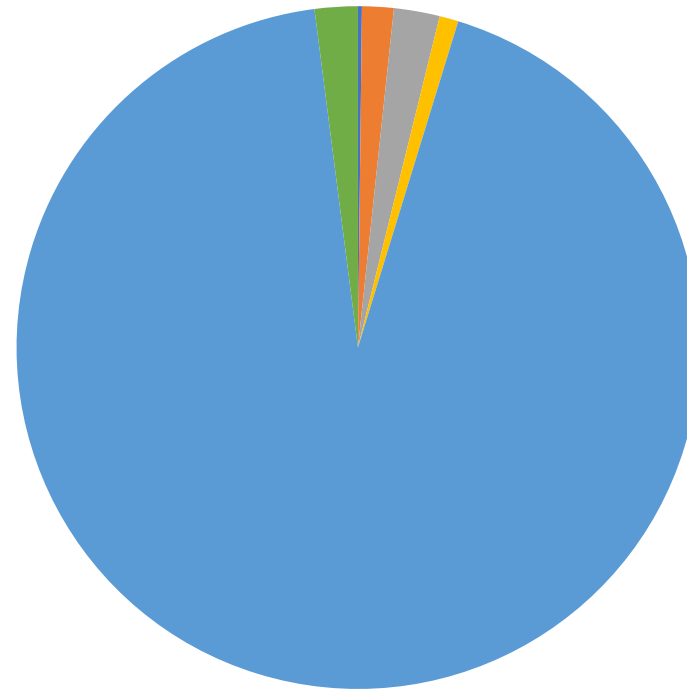


Source: NYS Department of Education

Education: School Enrollment, by Race/Ethnicity

- The student population in the LCLG Region is predominately White (93%), which is more than double the New York State proportion of White students (42%).
- Hispanic students comprise 32% of all Non-White students in the LCLG Region, however, make up only 2.2% of all students.
- The second largest ethnic/racial minority in the LCLG Region are those students identifying as Multi-Racial (30% of Non-White students), which account for 2% of all students.

School Enrollment, 2020
(All Students)



■ American Indian ■ Black
■ Hispanic ■ Asian/Pacific Islander
■ White ■ Multi-Racial

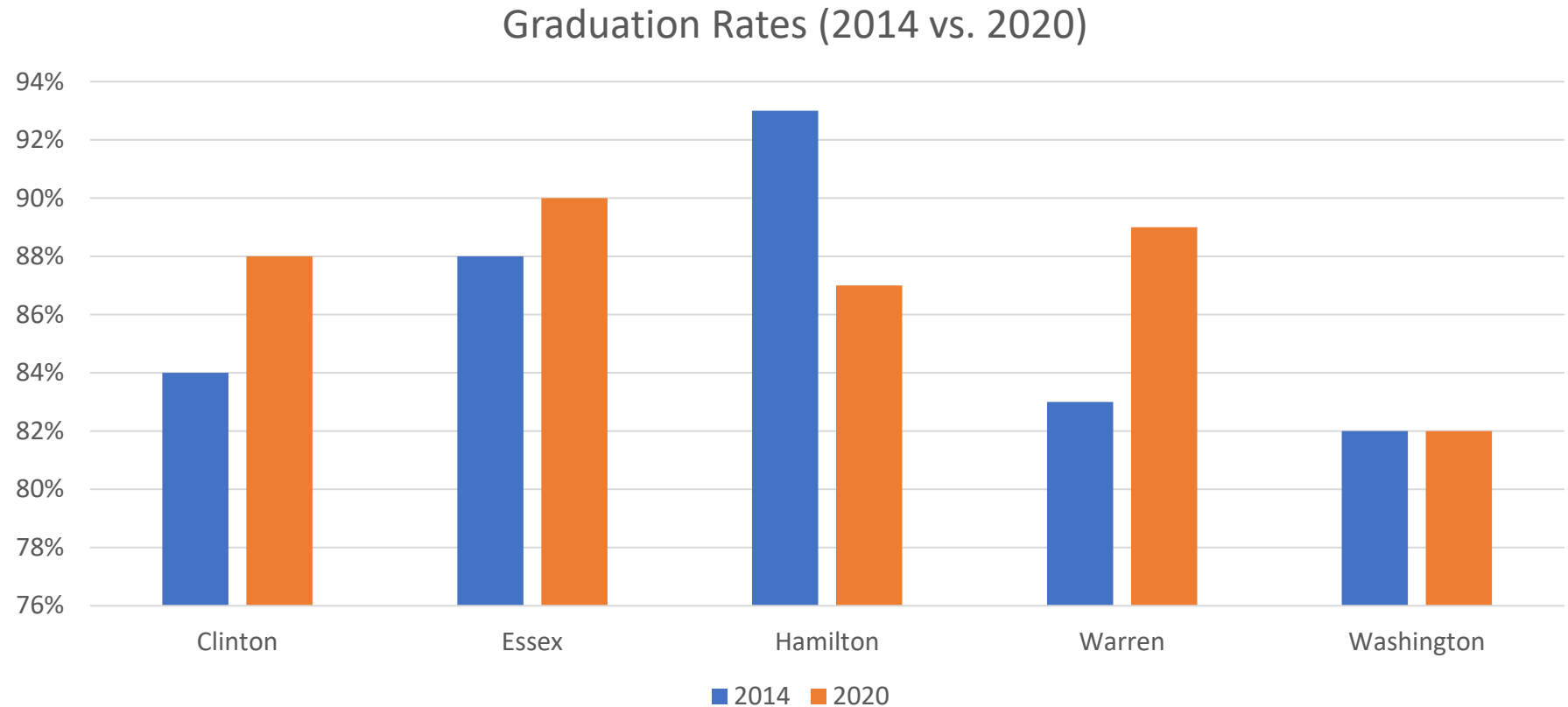
School Enrollment, 2020
(Non-White Students)



■ American Indian ■ Black
■ Hispanic ■ Asian/Pacific Islander
■ Multi-Racial

Education: Graduation Rates

- Graduation rates for each county in the LCLG Region, except Hamilton County, saw increases in the percentage of students graduating high school.
- Graduation rates in Hamilton County fell by 6% since 2014.
- The graduation rate for the LCLG Region is 87%.



Education: Graduation Rate by Race/Ethnicity

- While the regional graduation rate is 2% higher than that of NYS, when evaluated by race and ethnic background the graduation rates fall below that of NYS.
- The region's biggest gain in enrollment (2014-2020) was students of a "multi-racial" background, with an increase in 258 students. However, the graduation rate for these students in 2020 was only 56% - far below the NYS average of 84%.
- The second largest gain in enrollment was among students identifying as Hispanic, with an increase of 165 students. Similar to graduation rates of multi-racial students, only 73% of Hispanic students and 75% of Black students in the region graduated, compared to graduation rates for White (88%) and Asian/Pacific Islander (96%) students.

| Race/Ethnicity | # of Students | % of Student Pop. | Graduation Rate | NYS Graduation Rate |
|---------------------------------|---------------|-------------------|-----------------|---------------------|
| American Indian | 57 | 0.2% | - | 77% |
| Black | 459 | 1.5% | 75% | 78% |
| Hispanic | 665 | 2.2% | 73% | 77% |
| Asian/Pacific Islander | 274 | 0.9% | 96% | 91% |
| White | 28,575 | 93.2% | 88% | 91% |
| Multi-Racial | 624 | 2.0% | 56% | 84% |
| TOTAL Student Population | 30,654 | 100% | 87% | 85% |

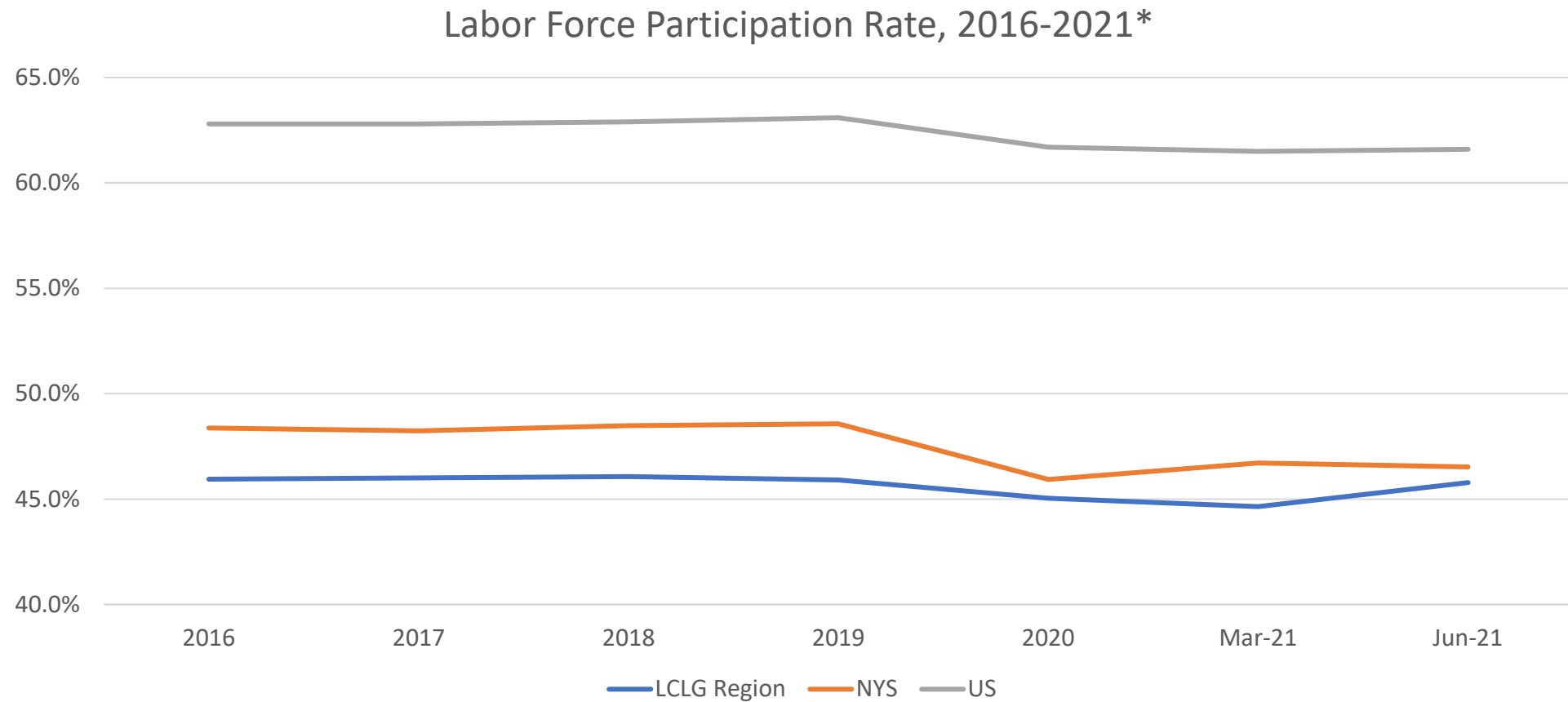
Education: Graduation Rate by Other Groups

- The term “English language learners” shall mean those who, by reason of foreign birth or ancestry, speak or understand a language other than English and speak or understand little or no English and therefore require additional support. The term “economically disadvantaged” includes students who participate in economic assistance programs, such as the free or reduced-price lunch, SSI, Food Stamps, etc.
- Students identified as *Economically Disadvantaged* represent approximately half (47%) of the currently enrolled student population in the LCLG Region, an increase of about 500 students since 2014. The graduation rate for these students, 79%, is below that of the regional graduation rate of 85%.

| Group Type | # of Students | % of Student Pop. | Graduation Rate | NYS Graduation Rate |
|---------------------------------|---------------|-------------------|-----------------|---------------------|
| English Language Learners | 107 | 0.3% | - | 46% |
| w/ Disabilities | 5,422 | 17.7% | 62% | 62% |
| Economically Disadvantaged | 14,530 | 47.4% | 79% | 80% |
| Migrant | 91 | 0.3% | - | 54% |
| Homeless | 291 | 0.9% | 41% | 64% |
| Foster Care | 75 | 0.1% | - | 49% |
| TOTAL Student Population | 30,654 | 100% | 87% | 85% |

Labor Force Participation Rate

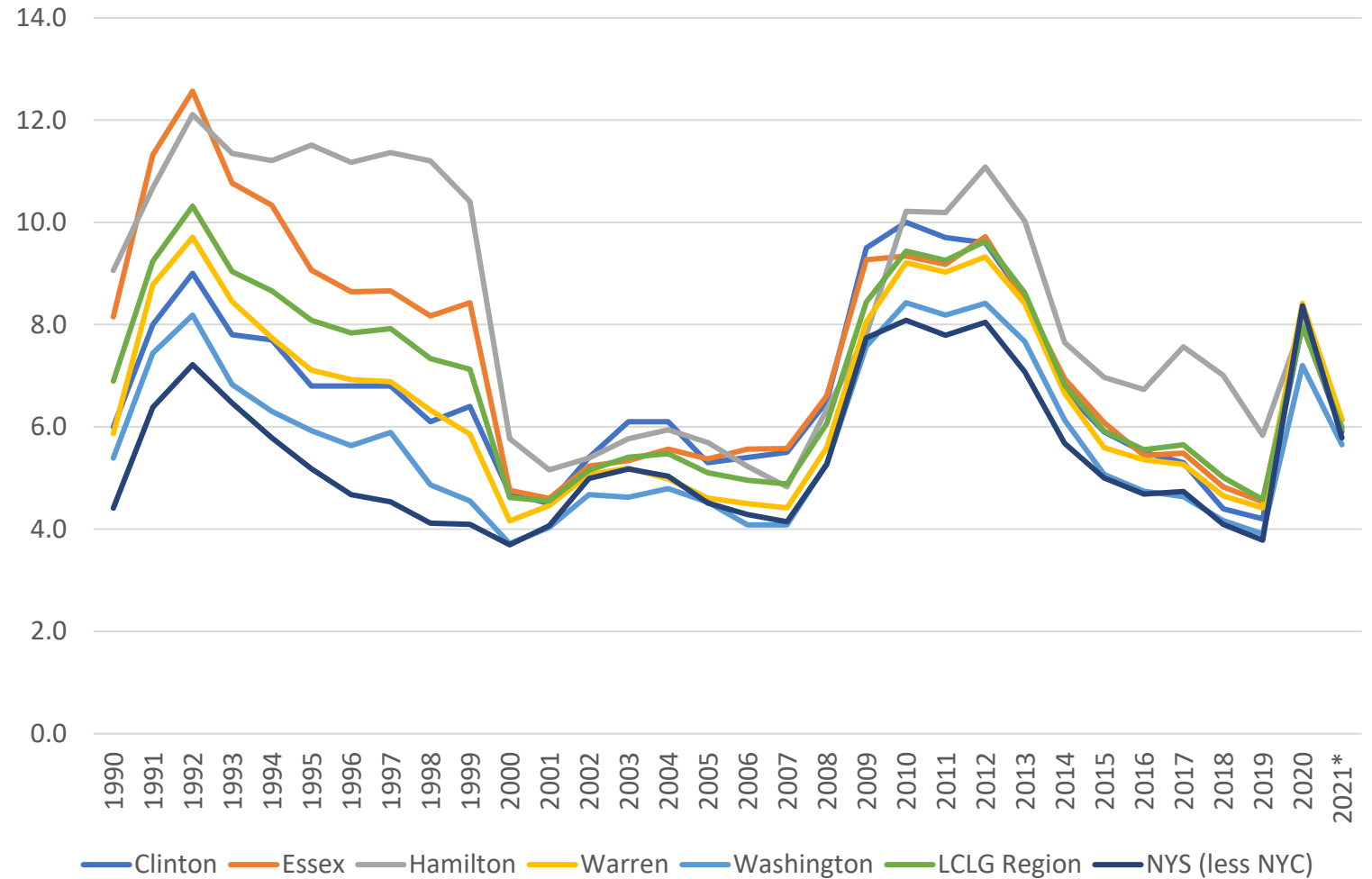
- Labor force participation in the LCLG Region has historically been below New York State and national averages, reaching a high of 46.1% in 2018.
- Similar to New York and the United States, the LCLG Region saw a decline in the labor force participation rate between 2019 and 2020, due in part to the COVID-19 pandemic.



Unemployment: 1990-2021

- Since the 1990's, unemployment levels in the LCLG Region have consistently been higher than those of New York State (outside NYC).
- As a result of the COVID-19 pandemic, every county in the LCLG Region, except for Hamilton County, saw the highest level of unemployment during April 2020 - with unemployment reaching as high as 18.9% in Essex County.

Unemployment: 1990-2021*



Source: US Bureau of Labor Statistics

Industry Analysis



Photo Credit: The Post Star

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%.

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 |
| Total | | 37,183 | 16,189 | 2,122 | 40,416 | 17,305 | 113,215 |
| Percent of Total LCLG Region Jobs | | 33% | 14% | 2% | 36% | 15% | 100% |

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%).
- 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%.

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 | 0.2% | 0.4% | <0.5% | 1.5% | 0.1% | 0.7% |
| 56 | Administrative and Support and Waste Management and Remediation Services | 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% |

Source: Emsi

*Darker green indicates higher percentages.

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

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.

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 |
| Total | | 112,525 | 113,215 | 690 | 1% | \$57,124 |

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.

| 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 |
| Total | | \$59,072 | \$54,072 | \$50,945 | \$55,989 | \$59,204 |

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.

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.

LCLG Region Sector Contribution to GRP, 2-Digit NAICS

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

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.

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.

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.

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 in Focus: Timber, Lumber, and Paper

- In 2021, businesses in the timber, lumber, and paper industries are providing approximately 2,634 jobs. The earnings of these workers average \$62,095.
- Jobs in these industries have declined by 24% (836 jobs) since 2015. The greatest declines have been experienced by the *Pulp, Paper, and Paperboard Mills*, losing 653 jobs, since 2015.
- The region suffered the greatest loss of employment (-677 jobs) in the industry between 2016 and 2017. Since then, some segments of industry have grown since 2018. For instance, *Converted Paper Products Manufacturing (NAICS 3222)* has gained 86 jobs, *Sawmills and Wood Preservation (NAICS 3211)* gained 19 jobs, and *Paper and Paper Product Merchant Wholesalers (NAICS 4241)* gained 7 jobs. These 3 industries represent 10% of the 2020 Gross Regional Product (GRP).
- Since 2018, 6-Digit NAICS industries adding the greatest number of employees included, *All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)* gained 68 jobs, *Paper Bag and Coated and Treated Paper Manufacturing (NAICS 322220)* gained 35 employees, and *Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)* added 29 jobs.

LCLG Region Top Employers in the Timber, Lumber, and Paper Industry – 4-Digit NAICS

| NAICS - 4 | Description | 2015 Jobs | 2016 Jobs | 2017 Jobs | 2018 Jobs | 2019 Jobs | 2020 Jobs | 2021 Jobs | Avg. Earnings Per Job | 2020 Payrolled Business Locations | 2020 GRP |
|-----------|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|-----------------------------------|---------------|
| 1131 | Timber Tract Operations | <10 | <10 | <10 | <10 | <10 | <10 | <10 | Insf. Data | 0 | \$9,509 |
| 3221 | Pulp, Paper, and Paperboard Mills | 2197 | 2159 | 1706 | 1684 | 1656 | 1625 | 1544 | \$92,849.02 | 9 | \$449,273,654 |
| 3222 | Converted Paper Product Manufacturing | 302 | 323 | 160 | 153 | 182 | 219 | 238 | \$74,980.53 | 3 | \$33,252,317 |
| 1133 | Logging | 276 | 254 | 240 | 236 | 235 | 238 | 234 | \$43,809.31 | 38 | \$14,618,384 |
| 3219 | Other Wood Product Manufacturing | 210 | 223 | 215 | 224 | 211 | 221 | 228 | \$49,308.19 | 13 | \$21,727,928 |
| 3211 | Sawmills and Wood Preservation | 208 | 199 | 189 | 178 | 216 | 194 | 196 | \$55,428.86 | 9 | \$19,618,736 |
| 3212 | Veneer, Plywood, and Engineered Wood Product Manufacturing | 147 | 133 | 158 | 164 | 185 | 111 | 108 | \$48,319.85 | 3 | \$10,930,940 |
| 4233 | Lumber and Other Construction Materials Merchant Wholesalers | 82 | 82 | 30 | 40 | 50 | 45 | 46 | \$66,733.92 | 10 | \$6,478,941 |
| 4241 | Paper and Paper Product Merchant Wholesalers | 19 | 25 | 29 | 20 | 30 | 22 | 26 | \$49,148.76 | 3 | \$3,092,032 |
| 1153 | Support Activities for Forestry | 27 | 21 | 16 | 17 | 14 | 13 | 12 | \$62,414.96 | 3 | \$2,543,671 |
| | Total | 3470 | 3421 | 2744 | 2715 | 2780 | 2689 | 2634 | \$77,956.47 | 91 | \$561,546,112 |

Source: Emsi

Industry in Focus: Timber, Lumber, and Paper

LCLG Region Top Employers in the Timber, Lumber, and Paper Industry – 6-Digit NAICS

| NAICS - 6 | Description | 2015 Jobs | 2016 Jobs | 2017 Jobs | 2018 Jobs | 2019 Jobs | 2020 Jobs | 2021 Jobs | Avg. Earnings Per Job | 2020 Payrolled Business Locations | 2020 GRP |
|-----------|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|-----------------------------------|---------------|
| 113110 | Timber Tract Operations | <10 | <10 | <10 | <10 | <10 | <10 | <10 | Insf. Data | 0 | \$9,509 |
| 321114 | Wood Preservation | <10 | <10 | <10 | <10 | <10 | <10 | <10 | Insf. Data | 0 | \$574,668 |
| 321911 | Wood Window and Door Manufacturing | <10 | <10 | <10 | <10 | <10 | <10 | <10 | Insf. Data | 1 | \$331,689 |
| 321912 | Cut Stock, Resawing Lumber, and Planing | <10 | <10 | <10 | <10 | <10 | <10 | <10 | Insf. Data | 0 | \$315,493 |
| 322121 | Paper (except Newsprint) Mills | 2197 | 2159 | 1706 | 1684 | 1656 | 1625 | 1544 | \$92,849.02 | 9 | \$449,273,654 |
| 113310 | Logging | 276 | 254 | 240 | 236 | 235 | 238 | 234 | \$43,809.31 | 38 | \$14,618,384 |
| 321113 | Sawmills | 200 | 191 | 181 | 170 | 209 | 186 | 189 | \$56,374.53 | 9 | \$19,044,068 |
| 321999 | All Other Miscellaneous Wood Product Manufacturing | 35 | 81 | 31 | 38 | 71 | 93 | 105 | \$42,939.87 | 2 | \$7,986,593 |
| 322291 | Sanitary Paper Product Manufacturing | 87 | 102 | 68 | 70 | 80 | 89 | 92 | \$75,590.12 | 1 | \$16,011,452 |
| 322220 | Paper Bag and Coated and Treated Paper Manufacturing | 195 | 215 | 63 | 39 | 54 | 65 | 74 | \$82,559.72 | 1 | \$10,494,131 |
| 322211 | Corrugated and Solid Fiber Box Manufacturing | 21<10 | | 30 | 44 | 48 | 65 | 72 | \$66,544.89 | 1 | \$6,746,734 |
| 321214 | Truss Manufacturing | 23 | 30 | 45 | 52 | 76 | 53 | 56 | \$45,453.17 | 2 | \$4,891,255 |
| 321920 | Wood Container and Pallet Manufacturing | 70 | 63 | 53 | 54 | 52 | 54 | 54 | \$48,630.07 | 4 | \$4,732,696 |
| 321211 | Hardwood Veneer and Plywood Manufacturing | 124 | 103 | 113 | 111 | 109 | 58 | 52 | \$50,895.55 | 1 | \$6,039,685 |
| 321992 | Prefabricated Wood Building Manufacturing | 88 | 54 | 103 | 99 | 64 | 41 | 36 | \$65,363.08 | 3 | \$4,822,694 |
| 321918 | Other Millwork (including Flooring) | 15 | 23 | 25 | 29 | 21 | 29 | 30 | \$48,863.65 | 3 | \$3,538,762 |
| 423320 | Brick, Stone, and Related Construction Material Merchant Wholesalers | 38 | 29<10 | | 17 | 24 | 19 | 18 | \$64,220.70 | 3 | \$2,631,012 |
| 423330 | Roofing, Siding, and Insulation Material Merchant Wholesalers | <10 | | 0 | 0 | 0 | 15 | 17 | \$68,872.72 | 1 | \$2,201,048 |
| 424120 | Stationery and Office Supplies Merchant Wholesalers | 0 | 11<10 | | 0 | 16 | 11 | 14 | \$43,834.22 | 1 | \$1,455,059 |
| 424110 | Printing and Writing Paper Merchant Wholesalers | <10 | <10 | <10 | <10 | <10 | 11 | 13 | \$54,820.97 | 2 | \$1,636,972 |
| 115310 | Support Activities for Forestry | 27 | 21 | 16 | 17 | 14 | 13 | 12 | \$62,414.96 | 3 | \$2,543,671 |
| 423310 | Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers | 22 | 30 | 23 | 20 | 23 | 11 | 10 | \$68,256.28 | 6 | \$1,637,362 |
| 423390 | Other Construction Material Merchant Wholesalers | 22 | 23<10 | <10 | <10 | | 0 | 0 | \$0.00 | 0 | \$9,519 |
| 424130 | Industrial and Personal Service Paper Merchant Wholesalers | 18 | 13 | 27 | 19<10 | | 0 | 0 | \$0.00 | 0 | \$0 |
| | Total | 3470 | 3421 | 2744 | 2715 | 2780 | 2689 | 2634 | \$77,956.47 | 91 | \$561,546,112 |

Source: Emsi

- In 2021, the highest concentration of jobs were in *Paper (except Newsprint) Mills (NAICS 322121)* – 1,544 jobs, *Logging (NAICS 113310)* – 234 jobs, *Sawmills (NAICS 321113)* – 189 jobs. These 3 industries represent 86% of the Timber, Lumber, and Paper industry cluster's contribution to Gross Regional Product (GRP).

Industry in Focus: Timber, Lumber, and Paper

Industry Purchases

- The timber, lumber, and paper industries import 100% of purchases from *Pulp Mills (NAICS 322110)* - \$20.8M, *Wet Corn Milling (NAICS 311221)* - \$13.7M, and *Paperboard Mills (NAICS 322130)* – \$11.9M.
- The greatest in-region purchases by timber, lumber, and paper industries in our region include:
 - Sawmills (NAICS 321113)*
 - \$31,809,975 (82% in-region purchases)
 - Logging (NAICS 113310)*
 - \$25,645,928 (44% in-region purchases)
 - Electric Power Distribution (NAICS 221122)*
 - \$9,671,514 (76% in-region purchases)
 - Paper (except Newsprint) Mills (NAICS 322121)*
 - \$7,710,135 (98% in-region purchases)

LCLG Region Top Industry In-Region Purchases in the Timber, Lumber, and Paper Industry – 6-Digit NAICS

| NAICS | Purchases from | In-region Purchases | % In-region Purchases | Imported Purchases | % Imported Purchases | Total Purchases |
|--------|--|---------------------|-----------------------|--------------------|----------------------|-----------------|
| 321113 | Sawmills | \$31,809,975 | 82.3% | \$6,834,994 | 17.7% | \$38,644,969 |
| 113310 | Logging | \$25,645,928 | 43.7% | \$33,088,849 | 56.3% | \$58,734,777 |
| 221122 | Electric Power Distribution | \$9,671,514 | 76.2% | \$3,024,550 | 23.8% | \$12,696,064 |
| 322121 | Paper (except Newsprint) Mills | \$7,710,135 | 98.4% | \$121,422 | 1.6% | \$7,831,557 |
| 482110 | Rail transportation | \$7,392,655 | 62.8% | \$4,383,468 | 37.2% | \$11,776,123 |
| 322220 | Paper Bag and Coated and Treated Paper Manufacturing | \$5,179,898 | 41.4% | \$7,318,902 | 58.6% | \$12,498,800 |
| 551114 | Corporate, Subsidiary, and Regional Managing Offices | \$4,049,318 | 13.5% | \$25,874,270 | 86.5% | \$29,923,589 |
| 484110 | General Freight Trucking, Local | \$3,099,795 | 56.1% | \$2,422,908 | 43.9% | \$5,522,703 |
| 321999 | All Other Miscellaneous Wood Product Manufacturing | \$2,752,422 | 94.0% | \$176,717 | 6.0% | \$2,929,138 |
| 561730 | Landscaping Services | \$2,459,919 | 77.0% | \$734,981 | 23.0% | \$3,194,900 |
| 321920 | Wood Container and Pallet Manufacturing | \$2,374,762 | 42.7% | \$3,182,149 | 57.3% | \$5,556,911 |
| 533110 | Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) | \$2,303,386 | 83.4% | \$457,003 | 16.6% | \$2,760,389 |
| 484220 | Specialized Freight (except Used Goods) Trucking, Local | \$2,242,152 | 72.4% | \$853,134 | 27.6% | \$3,095,286 |
| 493110 | General Warehousing and Storage | \$2,151,349 | 6.7% | \$30,126,881 | 93.3% | \$32,278,230 |
| 541330 | Engineering Services | \$2,125,040 | 39.6% | \$3,242,268 | 60.4% | \$5,367,308 |

Source: Emsi

Industry in Focus: Timber, Lumber, and Paper

Industry Sales

- The largest in-region sales by the timber, lumber, and paper industries in our region to other industries include:

- Paper (except Newsprint) Mills (NAICS 322121)*
 - \$58,568,711
- Sawmills (NAICS 321113)*
 - \$11,034,169
- State Government, Excluding Education and Hospitals (NAICS 902999)*
 - \$5,253,970
- Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)*
 - \$2,189,013

LCLG Region Top Industry In-Region Sales in the Timber, Lumber, and Paper Industry – 6-Digit NAICS

| NAICS | Sales to | Total In-Region Sales |
|--------|--|-----------------------|
| 322121 | Paper (except Newsprint) Mills | \$58,568,711 |
| 321113 | Sawmills | \$11,034,169 |
| 902999 | State Government, Excluding Education and Hospitals | \$5,253,970 |
| 322211 | Corrugated and Solid Fiber Box Manufacturing | \$2,189,013 |
| 322220 | Paper Bag and Coated and Treated Paper Manufacturing | \$1,859,036 |
| 321214 | Truss Manufacturing | \$1,844,220 |
| 322291 | Sanitary Paper Product Manufacturing | \$1,823,429 |
| 321999 | All Other Miscellaneous Wood Product Manufacturing | \$1,608,288 |
| 321211 | Hardwood Veneer and Plywood Manufacturing | \$1,467,607 |
| 326199 | All Other Plastics Product Manufacturing | \$1,347,282 |
| 903999 | Local Government, Excluding Education and Hospitals | \$1,262,311 |
| 238220 | Plumbing, Heating, and Air-Conditioning Contractors | \$1,248,432 |
| 321918 | Other Millwork (including Flooring) | \$1,247,988 |
| 238910 | Site Preparation Contractors | \$990,998 |
| 321992 | Prefabricated Wood Building Manufacturing | \$976,615 |

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.

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 |
|-----------|---|-----------|-----------|--------------------|----------------------|-----------------------|
| Growing | | | | | | |
| 6241 | Individual and Family Services | 1,386 | 1,956 | 571 | 41% | \$38,159 |
| 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 |
| 5617 | Services to Buildings and Dwellings | 1,242 | 1,537 | 295 | 24% | \$31,680 |
| 7225 | Restaurants and Other Eating Places | 6,813 | 7,070 | 257 | 4% | \$24,385 |
| 9029 | State Government, Excluding Education and Hospitals | 5,445 | 5,684 | 239 | 4% | \$106,667 |
| 4441 | Building Material and Supplies Dealers | 1,391 | 1,628 | 237 | 17% | \$48,653 |
| 5419 | Other Professional, Scientific, and Technical Services | 665 | 861 | 196 | 29% | \$43,588 |
| 6214 | Outpatient Care Centers | 456 | 645 | 189 | 42% | \$57,420 |
| 3391 | Medical Equipment and Supplies Manufacturing | 1,448 | 1,634 | 186 | 13% | \$85,266 |
| Shrinking | | | | | | |
| 3221 | Pulp, Paper, and Paperboard Mills | 2,192 | 1,705 | (487) | (22%) | \$89,932 |
| 5613 | Employment Services | 2,791 | 2,421 | (369) | (13%) | \$39,723 |
| 3273 | Cement and Concrete Product Manufacturing | 442 | 113 | (328) | (74%) | \$86,201 |
| 6231 | Nursing Care Facilities (Skilled Nursing Facilities) | 2,122 | 1,815 | (307) | (14%) | \$44,143 |
| 3371 | Household and Institutional Furniture and Kitchen Cabinet Manufacturing | 325 | 112 | (213) | (66%) | \$64,205 |
| 9039 | Local Government, Excluding Education and Hospitals | 6,582 | 6,381 | (201) | (3%) | \$62,188 |
| 4451 | Grocery Stores | 2,440 | 2,246 | (194) | (8%) | \$31,135 |
| 7223 | Special Food Services | 759 | 583 | (176) | (23%) | \$25,417 |
| 3222 | Converted Paper Product Manufacturing | 302 | 141 | (160) | (53%) | \$68,483 |
| 6211 | Offices of Physicians | 2,223 | 2,086 | (138) | (6%) | \$96,692 |

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.

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 Implications: Unemployment

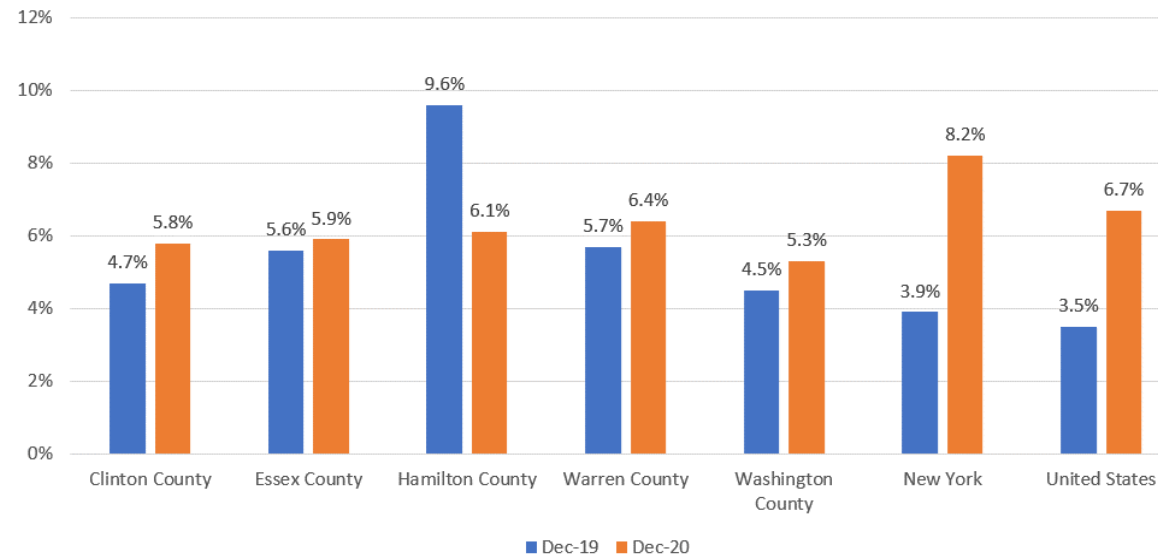
- County-level unemployment rates in the LCLG Region remain slightly elevated compared to December 2019 levels.
- Unemployment rates in the region have increased less than they have in New York and the U.S. (which have increased by 4.3% and 3.2%, respectively). The unemployment rate in Hamilton County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

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

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.

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

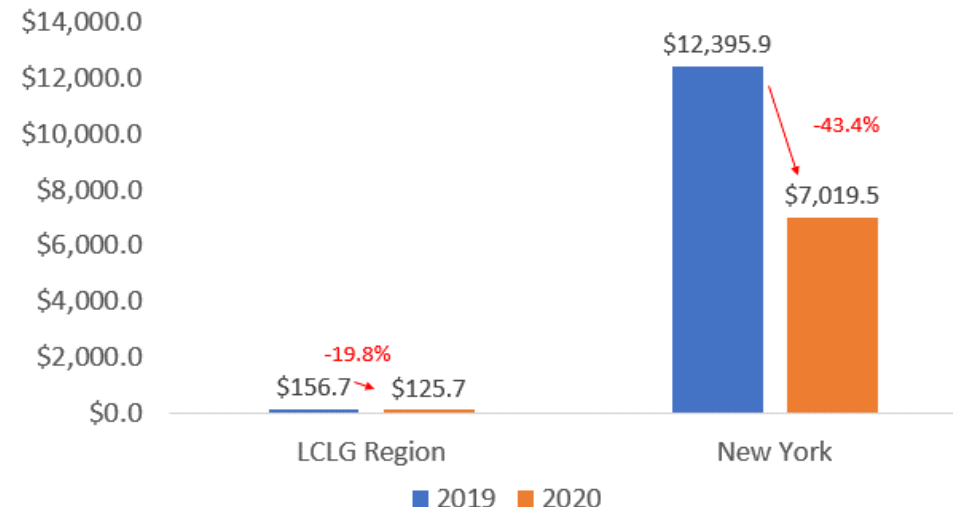
- Total sales tax revenue decreased by 0.9% from 2019 to 2020. New York fared worse with a 10% decline over the same period.
- Total sales decreased the most in Clinton County (by -3.2%), while Essex County saw a one percent increase in revenue and Washington County realized a 3.3% increase in revenue.
- 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.

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

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

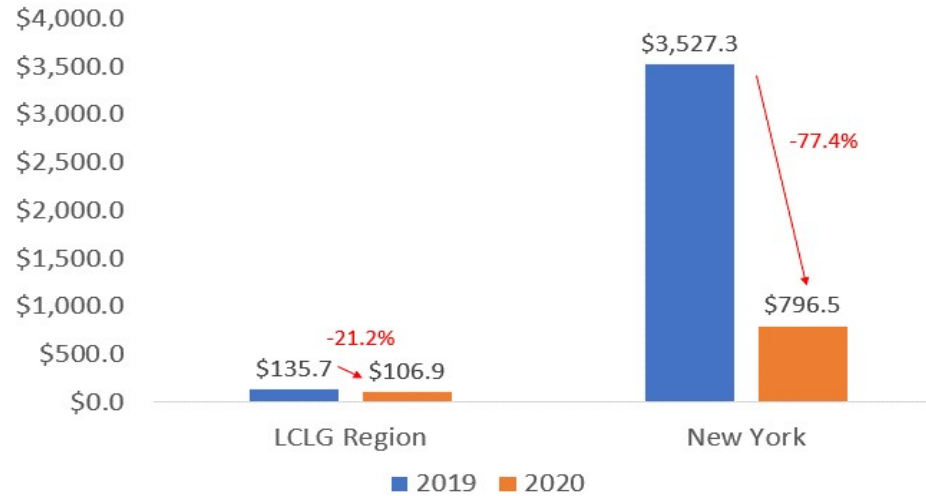


Source: New York State Department of Taxation and Finance

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.

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



Source: New York State Department of Taxation and Finance

Retail Trade: Taxable Sales and Purchases, Jun-Aug (Mil. \$)

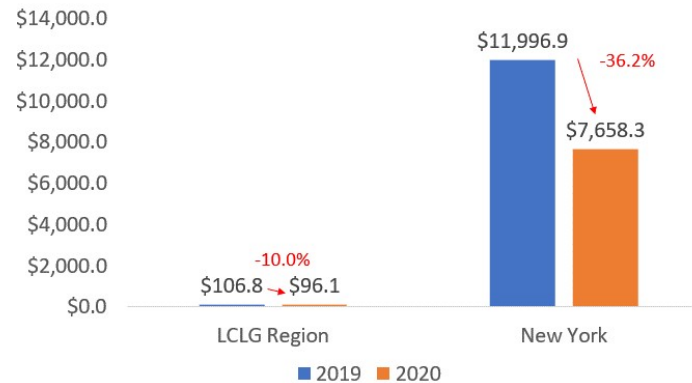


Source: New York State Department of Taxation and Finance

COVID-19 Implications: Economic Activity, Continued

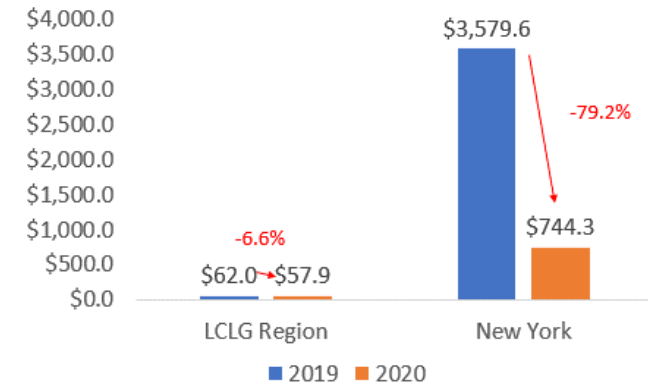
- Total taxable sales and purchases for the travel accommodations sector decreased more sharply for the state (nearly 80%) than the region (about 7%) last fall.
- Total taxable sales/purchases for restaurants, bars, and other food services declined more sharply for the state (about 36%) than the region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

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



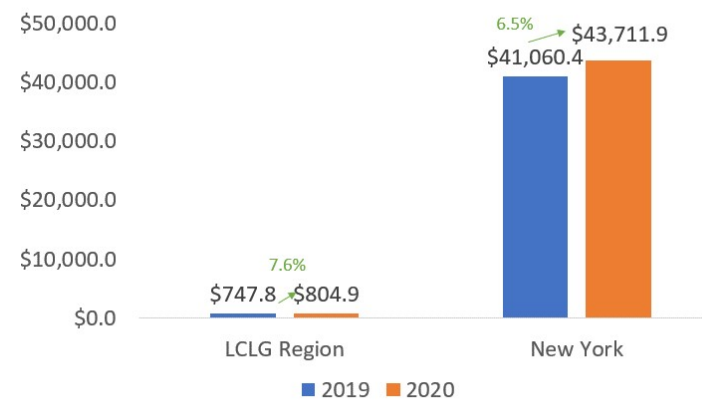
Source: New York State Department of Taxation and Finance

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



Source: New York State Department of Taxation and Finance

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



Source: New York State Department of Taxation and Finance

Agricultural Snapshot



Photo Credit: Washington County Tourism

Agricultural Snapshot

- 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%.

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% |
| Total | 1,882 | | 415,536 | | | | | | |

Source: USDA 2017 National Agriculture Census

Regional Farm Products

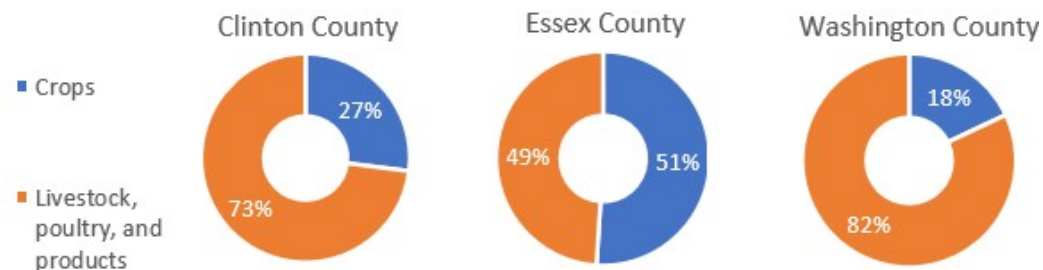
- Most farmland in Clinton and Washington Counties is used as cropland. The majority of farmland in Warren County and the plurality in Essex County, however, is woodland.
- The majority of agricultural sales in Clinton and Washington Counties are livestock, poultry and products.
- A majority of agricultural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

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

Share of Agricultural Sales by Type, 2017

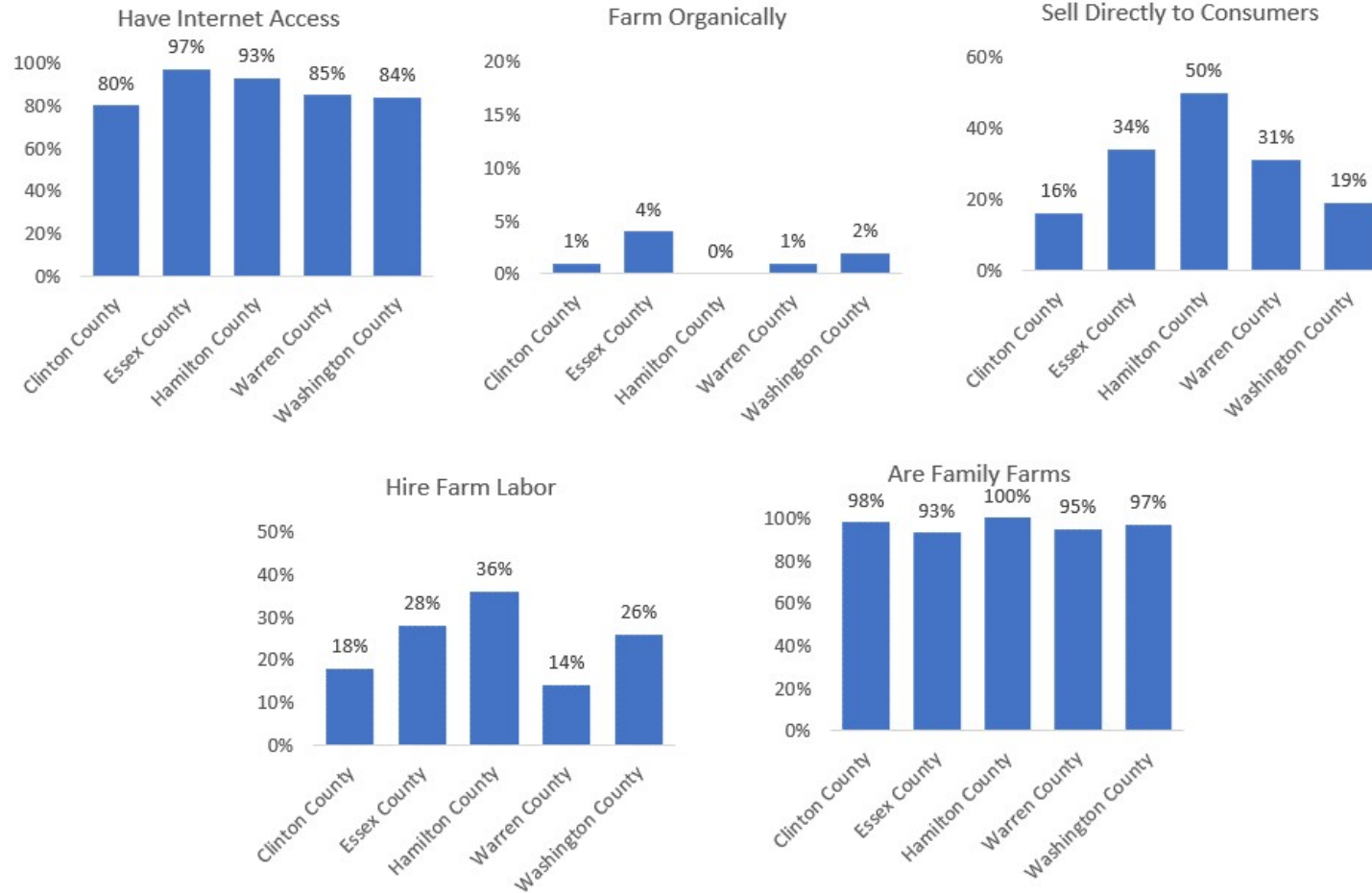


Source: USDA 2017 National Agriculture Census

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

Regional Farm Characteristics

The Percentage of Farms That:



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

Top Regional Crops

Top Crops in Acres: LCLG Region

Clinton County

| 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 |

Essex County

| 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 |

Warren County

| 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 |

Washington County

| 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.
- 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.

Farms With a 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 | 4,853 | 15% | 6,718 |

Source: USDA 2017 National Agriculture Census

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

Talent & Workforce Evaluation



Photo Credit: North Country Chamber of Commerce

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.

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 |
| Total | | 112,525 | 113,215 | 100% | 690 | 1% | | | 5,950 |

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.

Top 10 6-Digit SOC Occupations, LCLG Region

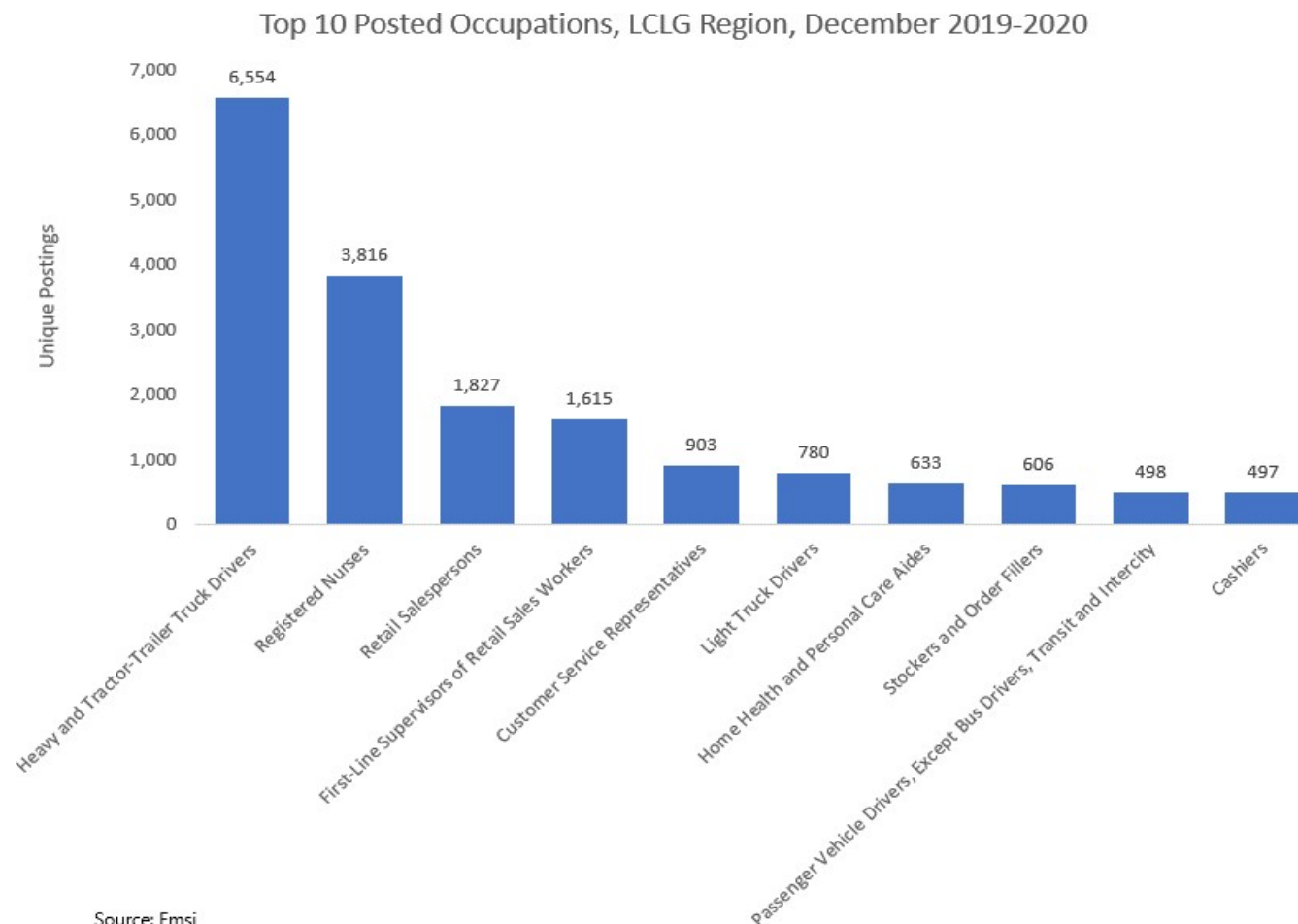
| SOC | Description | 2020 Jobs | Median Annual Earnings | Typical Entry Level Education | Work Experience Required | Typical On-The- Job Training |
|---------|--|--------------|------------------------------|-----------------------------------|--------------------------------|---------------------------------|
| 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.

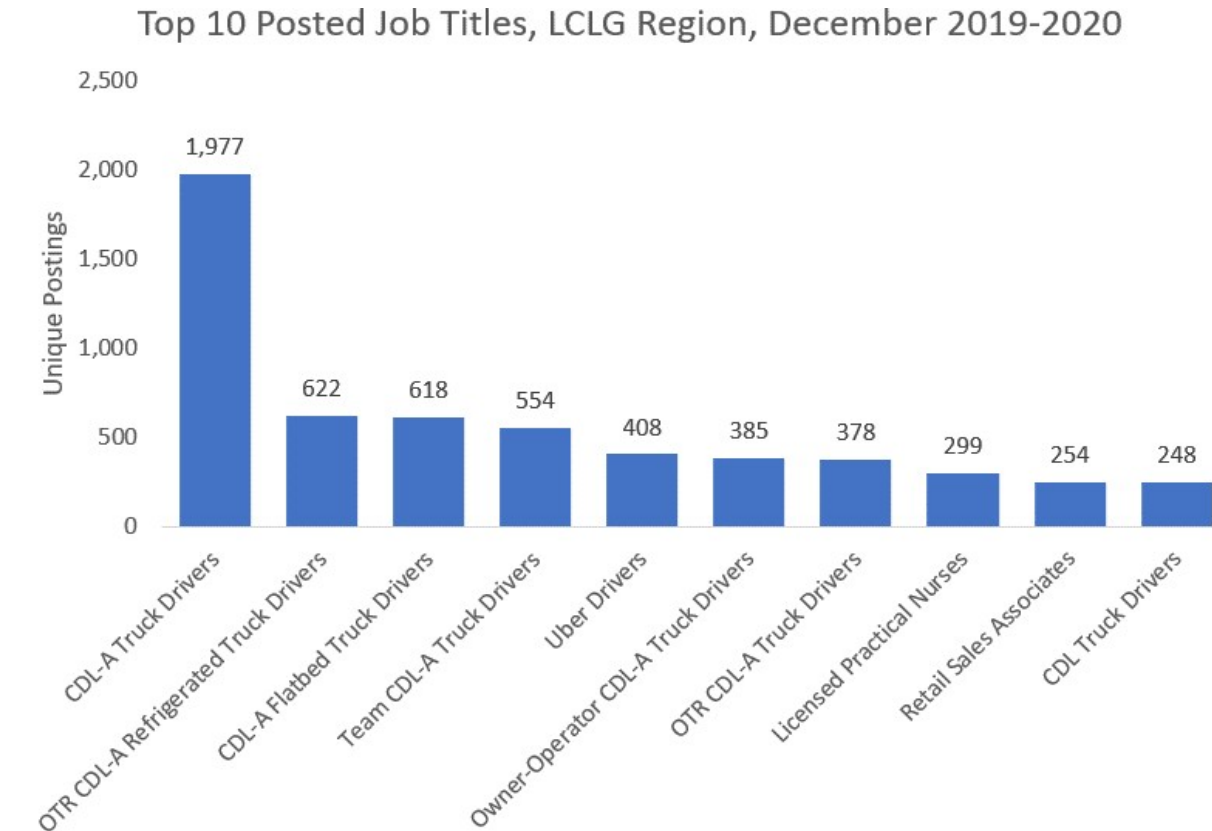
The prevalence of Heavy and Tractor-Trailer Truck Drivers in postings reflects national trends. With high turnover and the increase of distribution centers for online retail, the industry remains high on job postings across the country.



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.

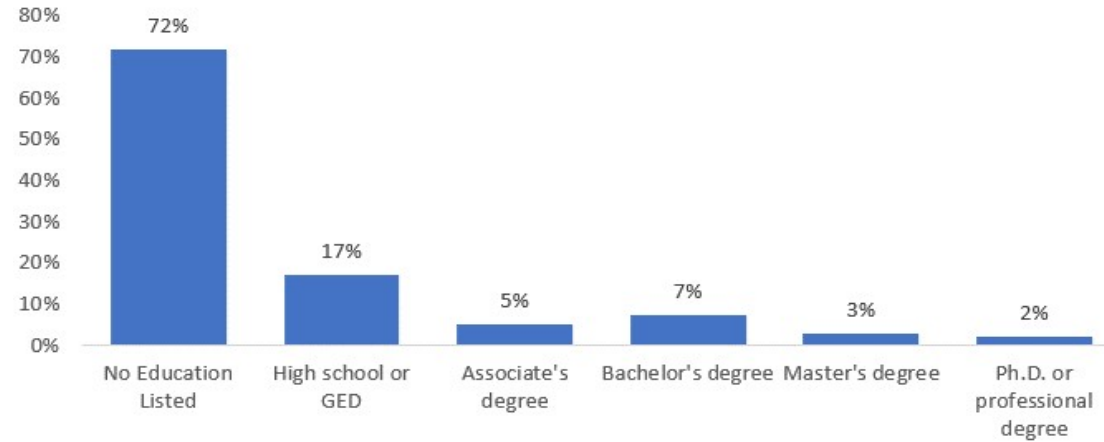


Source: Emsi

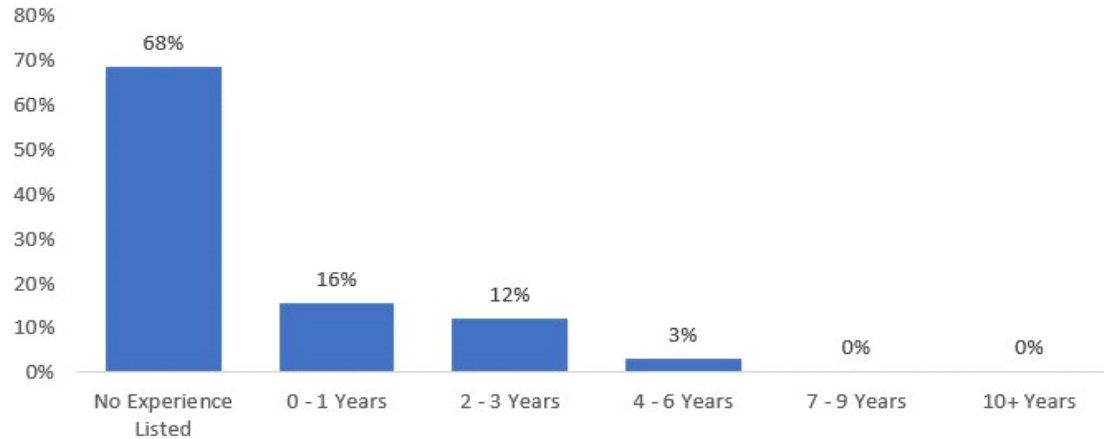
Education and Skill Requirements

- 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.

Educational Requirements in LCLG Region Job Postings



Work Experience Requirements in LCLG Region Job Postings



Source: Emsi

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.

**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.

| 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.

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

| Qualification | Postings with Qualification |
|---|-----------------------------------|
| 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 |

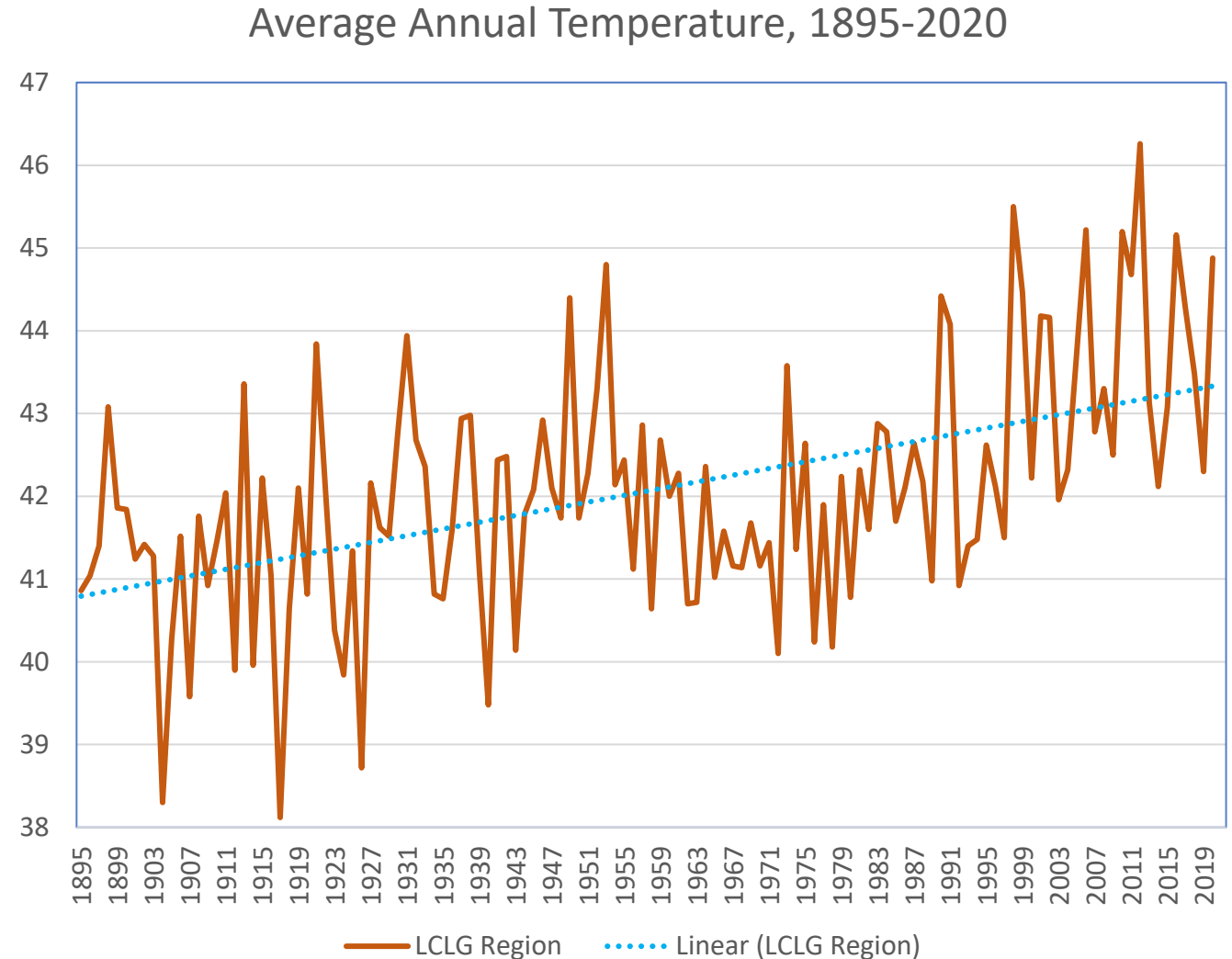
Source: Emsi

Environmental & Cultural Resources



Average Annual Temperature: 1895-2020

- Since 1895, the average annual temperature in the LCLG Region has risen by approximately 2.5° Fahrenheit, which is consistent with New York State averages.
- Rising temperatures in the region carry the potential to cause environmental, social, and economic harm.
- Unfettered rises in greenhouse gas emission will lead to increased occurrences of heat waves and periods above freezing (32°F) during winter months.



Source: National Centers for Environmental Information (NCEI) – National Oceanic and Atmospheric Administration (NOAA)

Impact of Climate Change on Skiing and Snowmobiling

- Gore Mountain Ski Center was included as part of a 2017 EPA-funded study to evaluate the projected impacts to the ski and snowmobile industry in the United States.
- The study evaluated projected impacts these industries, by 2050 and 2090. The assessment was completed using RCP4.5 and RCP8.5. RCP stands for “Representative Concentration Pathway” and relates to the amount of greenhouse gas emissions in the atmosphere. RCP8.5 represents the highest level of emissions for which current emissions are tracking the closest. RCP4.5 represents fewer emissions.
- The study concluded shortened season lengths for skiing and snowmobiling. By 2050, the season is expected to be shortened by 50-60% (RCP8.5). By the end of the century, the season is expected to be cut short by 80-90% (RCP8.5).
- A 2011 study by the [NYS Snowmobile Association](#) found that snowmobilers contribute \$868 million to the state economy.
- According to New York State, the economic impact of Gore Mountain and Whiteface Mountain, alone contributes over \$100 million to the regional economy.

C. Wobus et al.

Global Environmental Change 45 (2017) 1–14

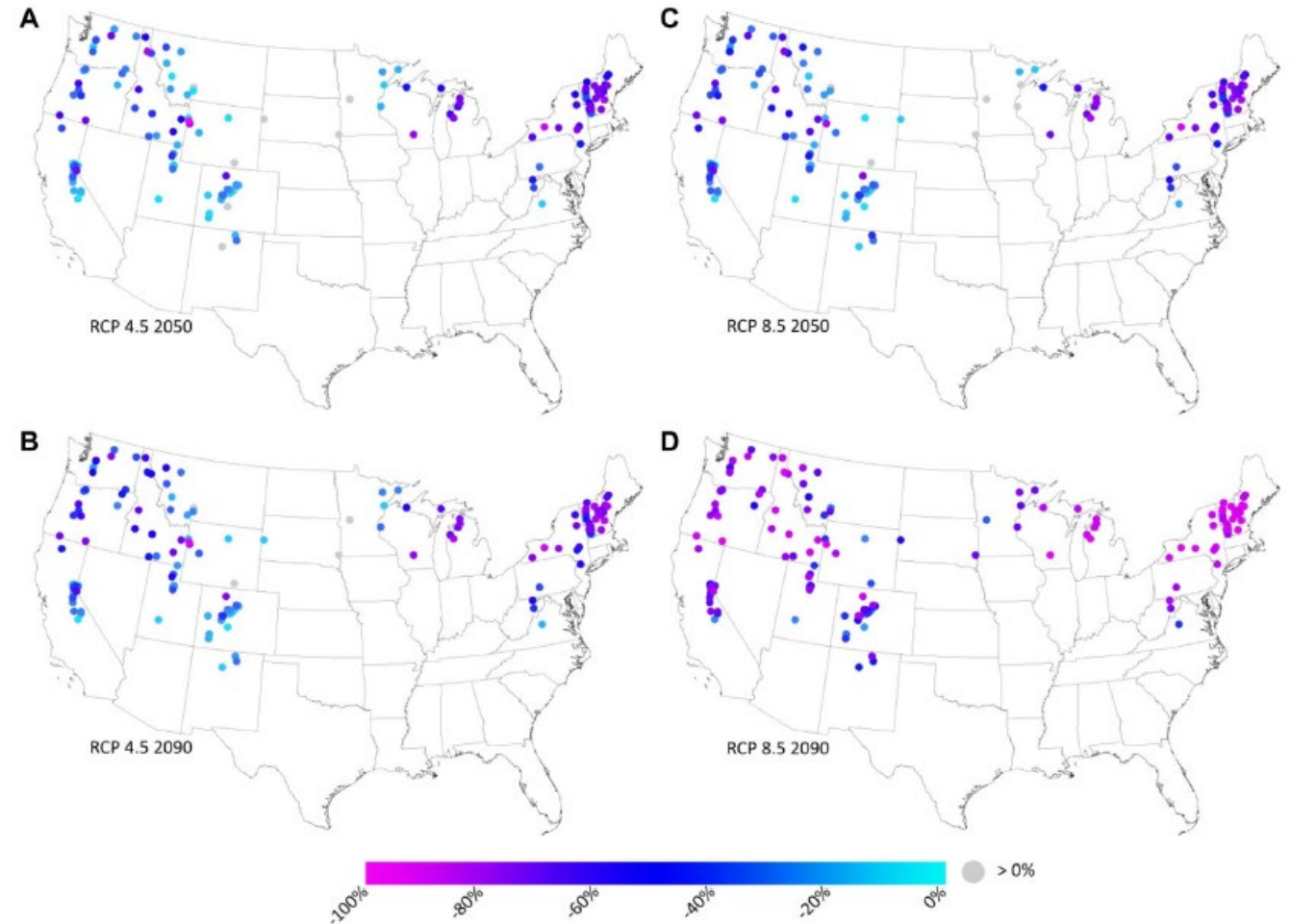


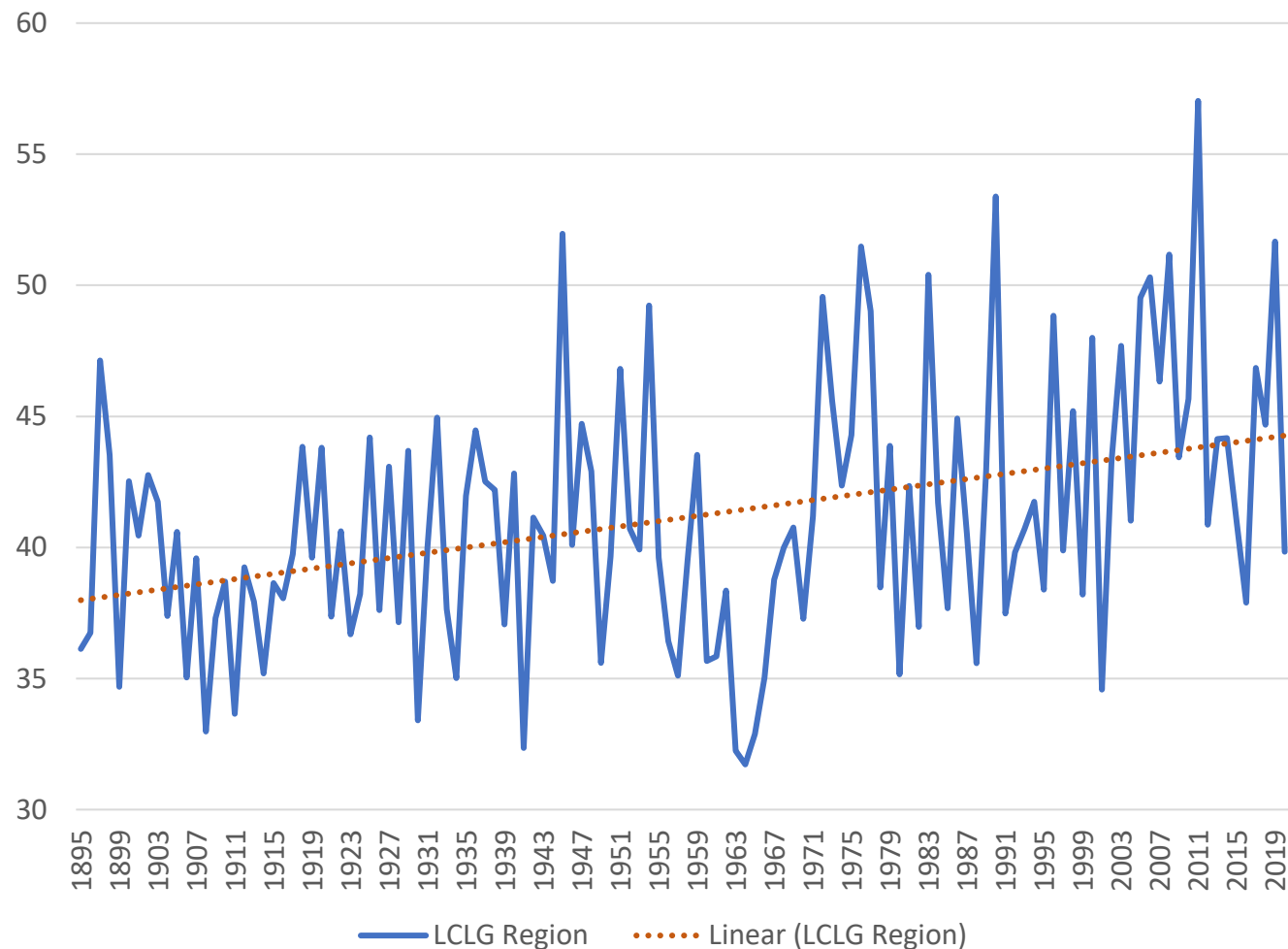
Fig. 4. Average percent change in annual cross-country skiing and snowmobiling season lengths across GCMs. A) Results for RCP4.5 in 2050. B) Results for RCP4.5 in 2090. C) Results for RCP8.5 in 2050. D) Results for RCP8.5 in 2090.

Source: [Global Environmental Change](#)

Average Annual Precipitation: 1895-2020

- Since 1895, the average annual amount of precipitation in the LCLG Region has risen by approximately 6 inches, which is consistent with New York State averages.
- The increases in precipitation are accompanied by changes in rainfall patterns, which during the last few decades has shifted to short duration, high intensity rainfall event. Existing road, bridge, and stormwater infrastructure in the LCLG Region are not designed to be resilient to these events.
- To avoid the loss of property and life, efforts should be taken to make existing infrastructure more resilient to the impacts of climate change.

Average Annual Precipitation, 1985-2020



Source: National Centers for Environmental Information (NCEI) – National Oceanic and Atmospheric Administration (NOAA)

Natural Resources: Mining

- Clinton County has the largest area dedicated to mining (1,105 acres).
- Most of the mining activity occurring in the LCLG Region is for *Sand & Gravel*, which accounts for 2,115 or 55.5% of the region's mined land.

| Commodity | Clinton | Essex | Hamilton | Warren | Washington | LCLG Region |
|---------------|-----------------|--------------|-------------|--------------|--------------|-----------------|
| Dolostone | 5 | - | 28.7 | - | - | 33.7 |
| Garnet | - | - | - | 194.5 | - | 194.5 |
| Gneiss | - | 5.74 | - | - | - | 5.74 |
| Granite | - | 175.3 | - | 158.7 | 229.6 | 563.6 |
| Limestone | 183.9 | 40 | - | - | 212.7 | 436.6 |
| Sand & Gravel | 789.6 | 411 | 61.7 | 367 | 485.9 | 2,115.20 |
| Sandstone | 126 | - | - | - | 39.6 | 165.6 |
| Shale | - | - | - | - | 2 | 2 |
| Wollastonite | - | 290.2 | - | - | - | 290.2 |
| TOTAL | 1,104.50 | 922.2 | 90.4 | 720.2 | 969.8 | 3,807.10 |

Threatened or Endangered Species

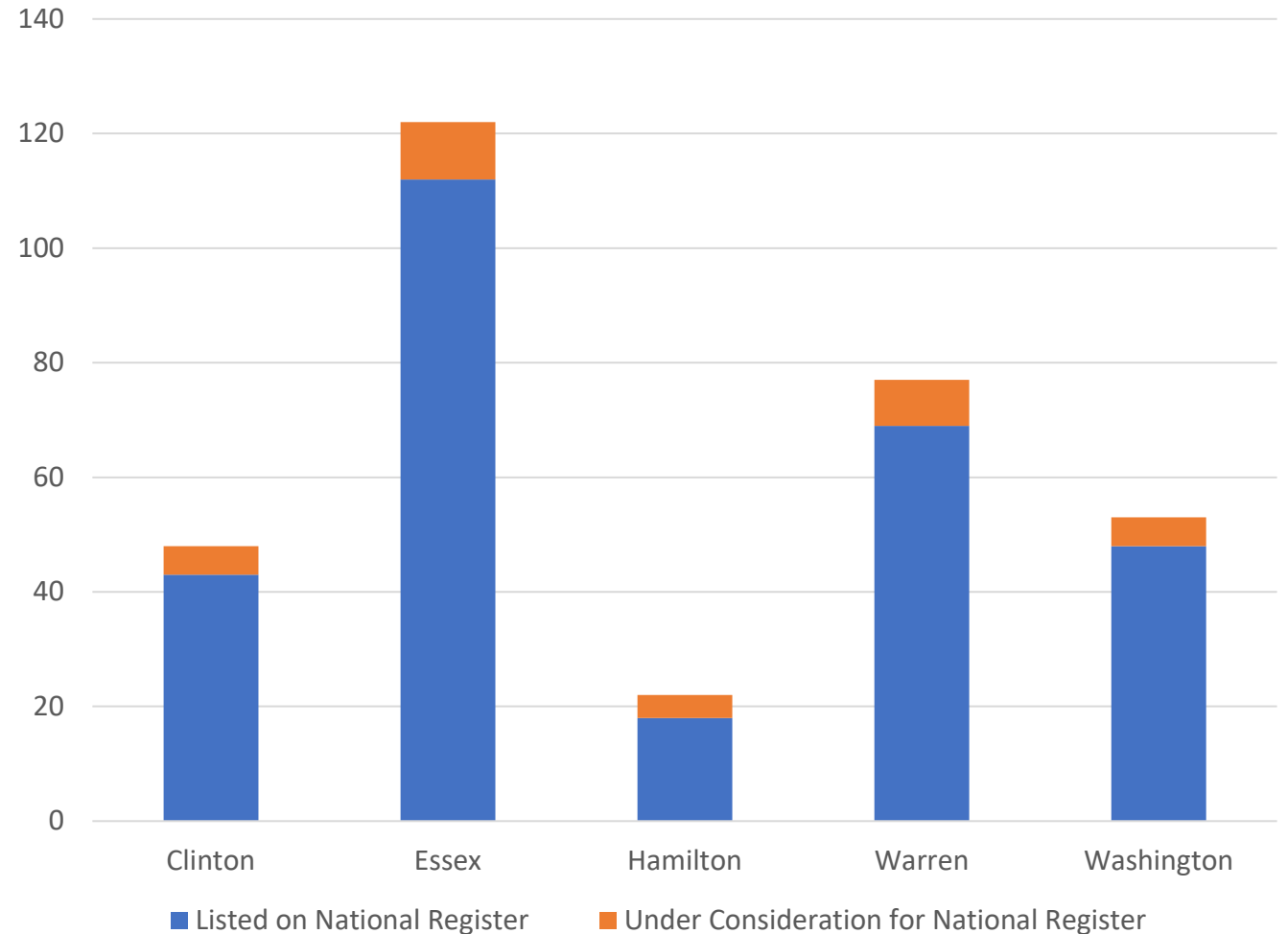
- Another important environmental factor that can impact development in the LCLG Region is the presence of threatened or endangered species. The following are species identified by US Fish and Wildlife (USFW).

| Species | Clinton County | Essex County | Hamilton County | Warren County | Washington County |
|--------------------------------------|----------------|--------------|-----------------|---------------|-------------------|
| Monarach Butterfly (candidate) | X | X | X | X | X |
| Karner Blue Butterfly (endangered) | | | | X | |
| Indiana Bat (endangered) | X | X | | X | X |
| Northern Long-Eared Bat (threatened) | X | X | X | X | X |

Historic and Cultural Resources

- Another factor to be considered during the review of development projects is the presence of historic, archaeological, or cultural resources.
- In the region, Essex County currently has the highest number properties listed on the National Historic Register (112).

Properties on National Historic Register, by County



Municipal Information



Municipalities and Special Districts

| County | Towns | Villages | Cities | Total Municipalities |
|--------------|-----------|-----------|----------|----------------------|
| Clinton | 14 | 3 | 1 | 18 |
| Essex | 18 | 1 | 0 | 19 |
| Hamilton | 9 | 1 | 0 | 10 |
| Warren | 11 | 1 | 1 | 13 |
| Washington | 17 | 8 | 0 | 25 |
| Total | 69 | 14 | 2 | 85 |

| County | Fire Districts | Library Districts | School Districts |
|--------------|----------------|-------------------|------------------|
| Clinton | 16 | 3 | 8 |
| Essex | 18 | 3 | 10 |
| Hamilton | 5 | 2 | 7 |
| Warren | 6 | 4 | 9 |
| Washington | 1 | 0 | 11 |
| Total | 46 | 12 | 45 |

Adirondack Park Land-Use

- Approximately 46% of the land in the LCLG Region is under private land ownership, the remainder is public lands. The amount of private land varies by county, with a low of 28% private land in Hamilton County and a high of 75% in Washington County.
- In addition to local land-use controls, the Adirondack Park Agency (APA) regulates private land use within the 6-million-acre Adirondack Park. The APA has 6 land-use classifications for private land use that permit different uses and intensities.
- The least restrictive APA land-use classification, *Hamlet*, allows local municipalities the greatest flexibility with respect to local land-use controls. *Hamlet* areas in the LCLG Region account for about 1% of private land in the region.

| | Clinton | Essex | Hamilton | Warren | Washington | LCLG Region |
|---------------------|------------|------------|------------|------------|------------|--------------|
| Public Land | 22% | 46% | 67% | 35% | 22% | 48.2% |
| Private Land | 72% | 48% | 28% | 58% | 75% | 45.7% |
| Hamlet | 0.9% | 1.6% | 0.4% | 1.9% | 0% | 1.1% |
| Moderate Int. | 2.2% | 1.7% | 1.1% | 4.5% | 4.9% | 2.1% |
| Low Intensity | 9.6% | 6.3% | 2.4% | 6.9% | 7.9% | 5.4% |
| Rural Use | 37.2% | 14.7% | 3.6% | 30.5% | 41.3% | 16.5% |
| Resource Mgmt | 22.1% | 23.2% | 20.2% | 13.6% | 20.5% | 20.4% |
| Industrial Use | 0% | 0.5% | 0% | 0.2% | 0% | 0.2% |

Property Tax Rates

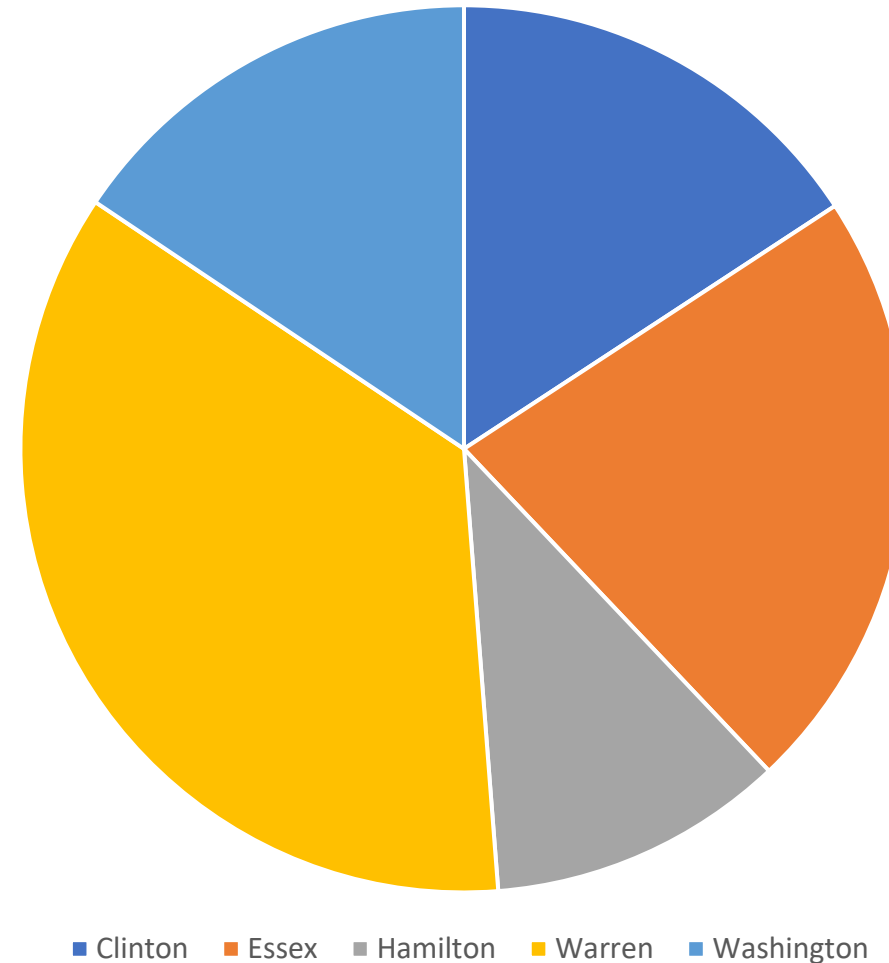
- Property tax rates were averaged by county and municipality type.

| Full Value Tax Rate (Levy per \$1,000 Full Value) | | | | |
|---|---------------------------|------------------------|------------------------|-----------------------|
| | Village Average (2020) | Town Average (2019) | City Average (2019) | County Rate (2019) |
| Clinton | 4.79 | 6.53 | 11.65 | 4.34 |
| Essex | 5.67 | 5.81 | - | 3.36 |
| Hamilton | 6.14 | 5.11 | - | 2.51 |
| Warren | 5.72 | 2.75 | 9.93 | 3.90 |
| Washington | 9.42 | 4.05 | - | 6.99 |
| Total Average | 6.348 | 4.85 | 10.79 | 4.22 |

Taxable Full Value

- *Taxable Full Value* is the measure of property value and the basis for which local property taxes are levied.
- Warren County accounts for 36% (\$11.4 billion) of the taxable full value of real property in the LCLG Region, followed by 22% (\$7.1 billion) in Essex County.

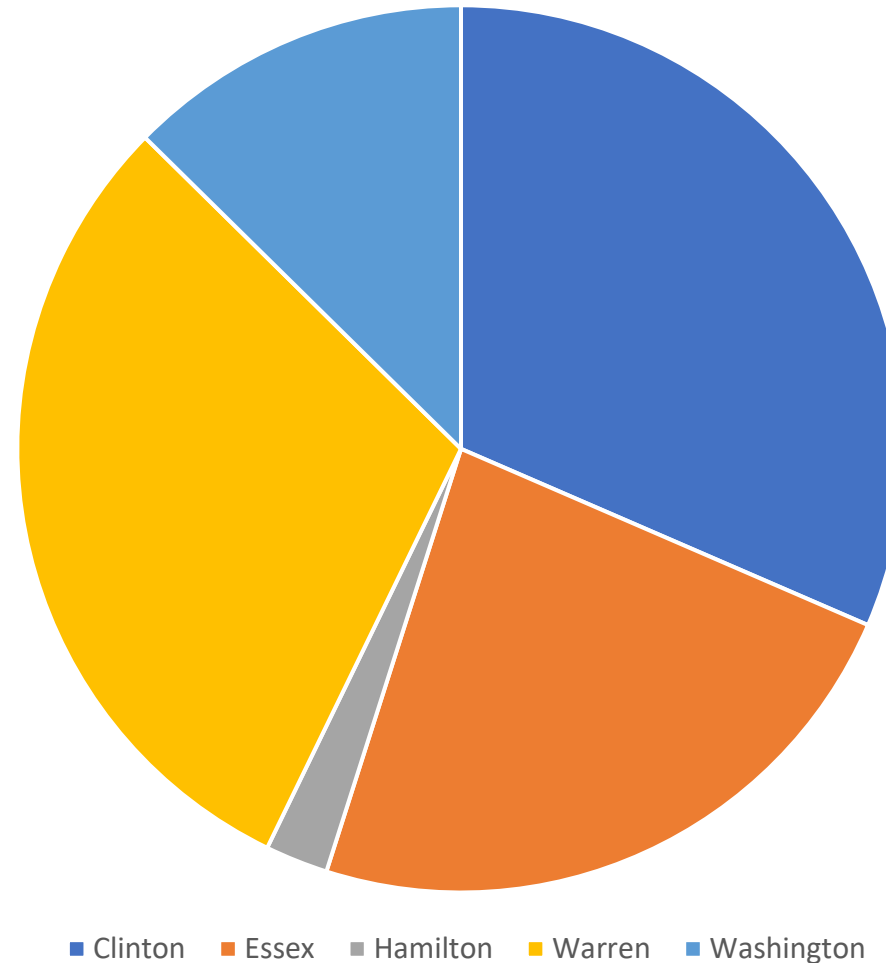
Taxable Full Value, 2020



Outstanding Municipal Debt

- Outstanding municipal debt was evaluated for counties and municipalities located within them.
- In 2020, Clinton County and its municipalities accounted for 32% (\$125.5 million) of the outstanding municipal debt in the LCLG Region, followed by Warren County at 30% (\$120.3 million).

Outstanding Debt, 2020



*Note: Outstanding municipal debt represents those of the county and local governments contained within it.

Appendix B

Comprehensive Economic Development Strategy (CEDS) Lake Champlain – Lake George Regional Planning Board Strategy Committee Meeting #1 July 7, 2021 @ 10A.M.

Meeting to be held on Zoom

<https://us02web.zoom.us/j/89391575778?pwd=cVNUZDVuZHVvZ0c2UWVWN2hOc3V5dz09>

Meeting ID: 893 9157 5778

Passcode: 508317

Agenda

1. Introductions
2. Project Description
3. Project Committee
4. Project Timeline
5. CEDS Content
6. Project Goals & Outcomes
7. Questions & Next Steps





2022-2027

Comprehensive Economic Development Strategy (CEDS)

Lake Champlain – Lake George Regional Planning Board
Economic Development District (EDD)

CEDS 101

- The LCLGRP serves as the regional Economic Development District (EDD) Clinton, Essex, Hamilton, Warren, and Washington Counties
 - Federally-designated EDD's are required to update the region's CEDS every 5 years, with revisions submitted annually to the US Economic Development Administration (EDA)
- CEDS analyzes the regional economic conditions and serves as a guide for:
 - Establishing regional goals and objectives
 - Developing and implementing a regional plan of action
 - Identification of investment priorities and funding sources

CEDS Strategy Committee

“Strategy Committee is the principal facilitator of the CEDS process and is responsible for developing and updating the CEDS”

- Roles

- Oversee CEDS process
- Review draft materials
- Provide relevant input
- Assist with Stakeholder input

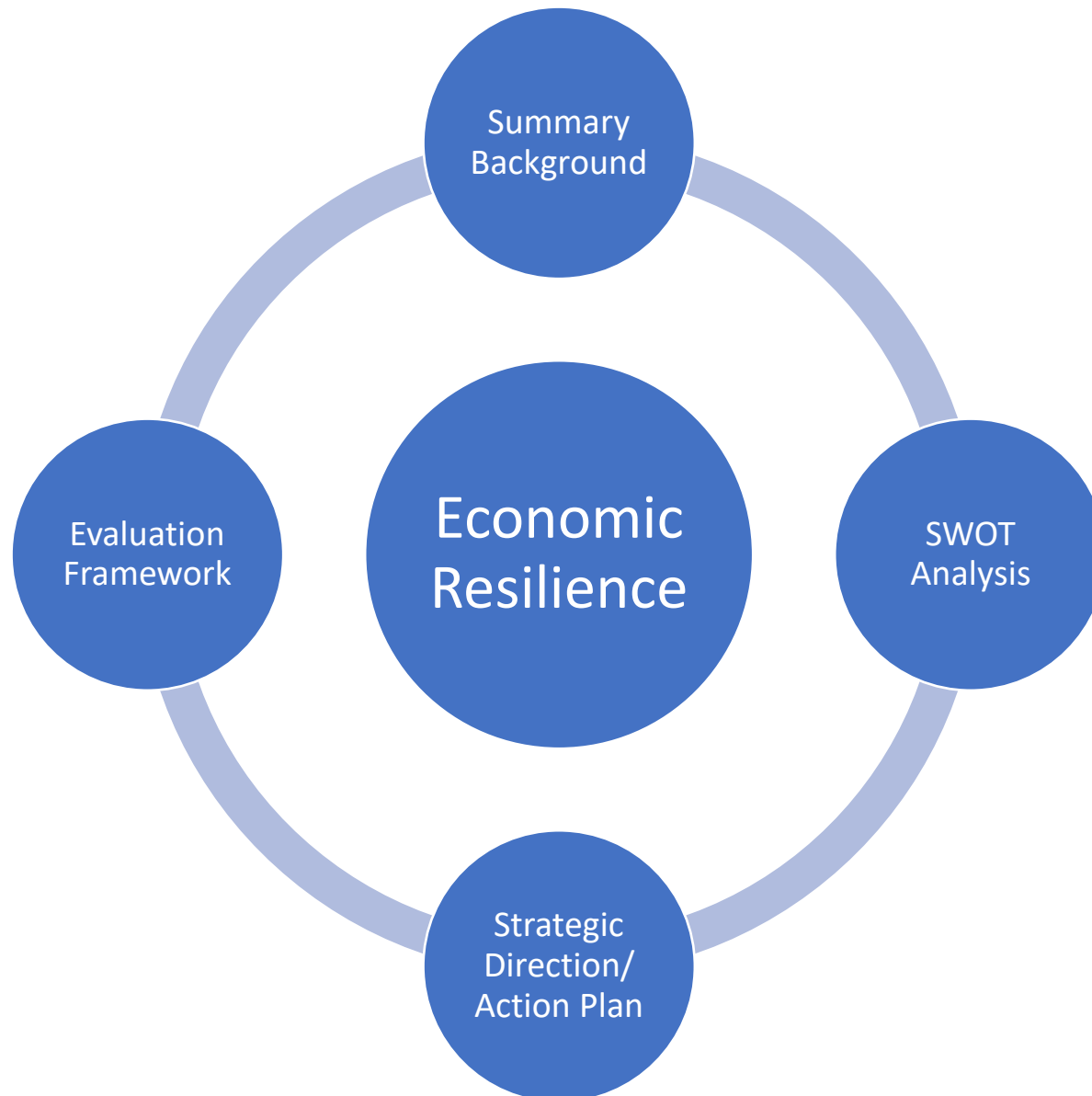
- Membership

- Chris Belden, AICP, Economic Development Coordinator (LCLGRP)
- Beth Gilles, Director (LCLGRP)
- Allison Gaddy, Senior Planner (LCLGRP)
- Laura Oswald, Director of Economic Development (Washington County)
- Ethan Gaddy, Assistant County Planner (Warren County)
- Anna Reynolds, Director of Community Resources (Essex County)
- Christy Wilt, Director of Economic Development (Hamilton County)
- Sue Matton, VP of Economic Development (North Country Chamber of Commerce)

Project Timeline

| Action | July | Aug. | Sept. | Oct. | Nov. | Dec. |
|---------------------------------|------|------|-------|------|------|------|
| Draft Summary Background | | | | | | |
| SWOT Analysis | | | | | | |
| Strategic Direction/Action Plan | | | | | | |
| Evaluation Framework | | | | | | |
| Economic Resilience | | | | | | |
| Draft Final CEDS | | | | | | |
| Final CEDS | | | | | | |
| Strategy Committee Meetings | | | | | | |
| Stakeholder Outreach | | | | | | |

CEDS Content



Economic Resilience

The ability to avoid, withstand, and recover from:

- Economic shifts
- Natural disasters
- Impacts of climate change

Economic Resiliency Plan

- LCLGRPB developing plan to understand impacts of pandemic and build greater resiliency to future economic downturn
- Project has consisted of business surveys, focus group sessions, and data analysis
- To be integrated into the CEDS
- Development of Data Dashboard
- Launch of Forward Together Initiative & BR&E Program

Summary Background

- Demographic and socioeconomic data
- Environmental, geographic, climatic, and cultural
- Infrastructure assets
- Emerging/declining clusters or industry sectors
- Relationship of area economy to larger region/state
- Factors that directly affect economic performance
 - E.g., workforce, laws, transportation, taxes, bonding capacity, land-use
- Other factors that relate to economic performance
 - E.g., housing, healthcare, education, culture, recreation, public safety

SWOT Analysis

- State of the regional economy
- Regional clusters
- External trends and forces
- Workforce considerations
- Higher Education
- Spatial efficiencies/sustainability
- Broadband needs
- Energy needs
- Natural hazards
- Equitable development
- Partners for economic development
- Resources for economic development

EDA Investment Priorities

1. Equity
2. Recovery & Resilience
3. Workforce Development
4. Manufacturing
5. Technology-Based Economic Development
6. Environmentally-Sustainable Development
7. Exports & Foreign Direct Investment (FDI)

Project Goals & Outcomes

- 25-30 page document + online component
 - Integrate other plans (CIPs, TIPs, comprehensive or strategic plans)
 - Gain stakeholder participation
 - Implement framework for regional collaboration
 - Develop document that supports funding assistance and other initiatives
-
- WHAT ARE THE COMMITTEE'S GOALS?

Questions & Next Steps

Chris Belden, AICP

chris.belden@lclgrp.org

(518) 668-5773 x15

Comprehensive Economic Development Strategy (CEDS) Lake Champlain – Lake George Regional Planning Board Strategy Committee Meeting #2 September 21, 2021 @ 10A.M.

Meeting to be held on Zoom

<https://us02web.zoom.us/j/88454037722?pwd=WFZIRFIFbDE2QjJnRWWhiMXN1NzIQQT09>

Meeting ID: 884 5403 7722

Passcode: 882544

Agenda

1. Review of CEDS Project
2. Background Summary
3. SWOT Analysis
4. Stakeholder Outreach
5. Economic Resiliency Plan Integration
6. Next Steps
 - a. Strategic Direction (Vision Statement and Goals)
 - b. Action Plan (Implementation Strategy)
 - c. Evaluation Framework
7. Questions





2022-2027 Comprehensive Economic Development Strategy (CEDS)

Lake Champlain – Lake George Regional Planning Board EDD
CEDS Strategy Committee | Meeting 2
September 2021

Meeting Agenda

- Review of Background Summary
- SWOT Analysis
- Stakeholder Outreach
- Economic Resiliency Plan Integration
- Next Steps
 - Vision and Goals
 - Implementation Strategy
 - Evaluation Framework

EDA Investment Priorities



Equity



Recovery &
Resilience



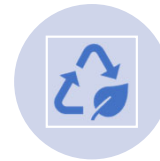
Workforce
Development



Manufacturing



Technology-Based
Economic
Development



Environmentally-
Sustainable
Development



Exports & Foreign
Direct Investment
(FDI)

Project Timeline

| Action | July | Aug. | Sept. | Oct. | Nov. | Dec. |
|---------------------------------|------|------|-------|------|------|------|
| Summary Background | | | | | | |
| SWOT Analysis | | | | | | |
| Strategic Direction/Action Plan | | | | | | |
| Evaluation Framework | | | | | | |
| Economic Resilience | | | | | | |
| Draft Final CEDS | | | | | | |
| Final CEDS | | | | | | |
| Strategy Committee Meetings | ★ | | ★ | ★ | | |
| Stakeholder Outreach | | | | | | |

Demographic Summary

2% population loss

Aging Population

Median household income is lower than state and national averages

Limited racial and ethnic diversity, slowly increasing since 2010

Increase of about 2,500 occupied housing units

Student enrollment declining at a rate double that of NYS (6%)

Graduation rates increasing*

Biggest gain in enrollment (258) among “multi-racial” students. However, graduation rate is 56% compared to NYS average of 84%

Half of enrolled students (47.4%) are “economically disadvantaged.” Graduation rates among these students is 79%, compared to that of entire student body, 87%.

Industry Analysis Summary

Employment is concentrated in Warren (36%) and Clinton (33%) counties.

Government jobs account for 21% of all jobs, followed by Healthcare and Social Assistance (14%), Retail Trade (13%) and Accommodation and Food Services (11%)

Average earnings per job in region (\$57,124) is below that of NYS (\$88,755).

Retail Trade jobs suffered biggest loss, 478 employees

Since 2008 Recession, region has gained only 1% of employment base, compared to NYS (12%) and US (14%).

Region's most concentrated industry sector is Agriculture, Forestry, Fishing

Essex, Hamilton, and Warren have concentration of Arts, Entertainment, and Recreation

Government, Manufacturing, Healthcare and Social Assistance, and Retail Trade are biggest contributors to GRP

Industry Analysis Summary, Continued

Largest industry by employment (4-digit NAICS) is Education and Hospitals, (8,393 jobs), followed by Restaurants and Other Eating Places (7,070).

Of the top 20 employing industries, nearly half have lost jobs over the past 5 years, especially, Pulp, Paper, and Paperboard Mills (-487 jobs).

- LQ of Pulp, Paper, Paperboard Mills is 26.04
- Of the top 12 industries with the highest LQ have, 50% have lost jobs in the past 5 years

Since 2015, Individual and Family services have added the most jobs (571). Followed by Education and Hospitals (425).

Growing and concentrated industries (added jobs in last 5 years and have LQ over 2.0) include

- Recreational and Vacation Camps
- Surgical and Medical Instrument Manufacturing
- Residential and Intellectual and Developmental Disability Facilities
- State Government
- Other Building Material Dealers

Agricultural Summary

Clinton and Essex counties have experienced a positive change in the market value of products sold since 2012, increasing 13% in each.

Farmland in Clinton and Washington primarily cropland

Majority of agricultural sales in Clinton and Washington are livestock, poultry and products

Majority of agricultural sales in Essex County are crops

Talent and Workforce Summary

Occupations in Business and Financial Operations and Healthcare Practitioners and Technical occupations grew by 541 and 532 jobs respectively.

Except for Registered Nurses, top occupations in the regions do not require degrees

Top occupations include Retail Salespersons, Cashiers, and Fast Food and Counter Workers.

Top job postings for Heavy and Tractor Trailer Truck Drivers and Registered Nurses.

Top In-Demand Hard Skills, Merchandising and Nursing

Top In-Demand Common Skills, Customer Service, Communications, Sales, and Management.

Top In-Demand Job Qualification is CDL

Environmental Summary

Regional average
annual
temperature
increasing

Regional average
annual
precipitation
increasing

Threats to winter
recreation due to
climate change

Limits on
development
within the
Adirondack Park

Economic Resiliency Plan

| Topic Area | Recommended Economic Resiliency Actions |
|--|--|
| Connecting Our People | <ul style="list-style-type: none"> • Develop regional telecommunications plan and project development strategy • Develop regional water and wastewater needs assessment/strategy • Launch pilot broadband deployment and small cell project • Explore feasibility of new transportation options to meet workforce needs |
| Child Care Access | <ul style="list-style-type: none"> • Establish staffed family child care network • Recruit, train, and open more home-based child care • Support regional childcare advocates to increase revenue |
| Housing Access & Stability | <ul style="list-style-type: none"> • Establish regional coordination group and champion for housing • Develop regional housing assessment and strategy • Create a LCLG Regional Land Bank • Develop year round modular housing factory and deploy units through region • Create and deploy regional housing portal |
| Main Streets & Community Centers as Economic Engines | <ul style="list-style-type: none"> • Connect main streets and community hubs • Pursue BOA designations in relevant geographies • Establish regional destination management planning group • Main street redevelopment site assessments • Match small businesses with main street spaces • Main street rent stabilization • Downtown and hamlet center streetscape revitalization |

Economic Resiliency Plan Continued

| Topic Area | Recommended Economic Resiliency Actions |
|------------------------------------|---|
| Entrepreneurial Ecosystem Building | <ul style="list-style-type: none"> • Reimagine supply chain resilience through entrepreneurship • Coordinate cohorts for regional small business training and support • Hold startup pitch competition • Host regular event series focus on networking and support • Ensure women, minorities and veterans are accessing and engaging in the ecosystem |
| Career Building & Skills Training | <ul style="list-style-type: none"> • Support efforts/fund potential to upskill existing workers, especially in high tech fields • Replicate “career jam” program across region • Tailor BRE survey questions for real time labor market information • Advocate for BOCES skill building in pace of study hall |
| Additional Actions | <ul style="list-style-type: none"> • Support and replicate existing mobile health care providers • Establish regional agricultural hub • Explore development of nanocellulose initiative • Explore mobile meat processing facilities • Increase coordination and collaboration within the medical device and life science sector • Explore developing rural health care program • Conduct regional economic diversification assessment • Conduct regional food assessment • Highlight value of US/Canadian Border • Showcase the region as leader in climate change • Continue LCLGRPB’s role as the region’s coordinating economic development organization |

Next Steps

- Remaining Items
 - SWOT Analysis Survey is open until October 20th
 - Vision and Goals
 - Implementation Strategy
 - Evaluation Framework
- Next Meeting in October

Thank you!

Chris Belden, AICP
Lake Champlain – Lake George Regional Planning Board
(518) 668-5773
Chris.belden@lclgrpb.org

Comprehensive Economic Development Strategy (CEDS) Lake Champlain – Lake George Regional Planning Board Strategy Committee Meeting #3 December 7, 2021 @ 1:00PM

Meeting to be held on Zoom

<https://us02web.zoom.us/j/89117549180?pwd=WDVXKzlyY2VhYTY3VGZlR0hYNTtPd09>

Meeting ID: 891 1754 9180

Passcode: 325193

Agenda

1. Review of SWOT Analysis Survey Results
2. Review of CEDS Vision Statement
3. Review of Goals, Strategies and Actions
4. Review Evaluation Framework
5. Questions





2022-2027 Comprehensive Economic Development Strategy (CEDS)

Lake Champlain – Lake George Regional Planning Board EDD





























CEDS Strategy Committee | Meeting 3

December 2021

Meeting Agenda

- SWOT Survey Results
- Vision Statement
- Goals & Strategies
- Implementation Strategy (Action Plan)
- Evaluation Framework

SWOT Survey Results

| Strengths | Weaknesses | Opportunities | Threats |
|--|--|---|--|
| Quality of Life & Communities  | Housing Options  | Federal, State & Local Grants  | Lack of Housing Options  |
| Recreational Resources  | Broadband/Cell Coverage  | Improvement of Infrastructure  | Lack of Well-Paying Job Opportunities  |
| Environment/Natural Resources  | Job Opportunities  | Downtown & Hamlet Revitalization  | Energy Prices  |
| Tourism  | Childcare/Eldercare Options  | Preservation of Environmental Resources  | Lack of Business Incentives  |
| Education & Schools  | Transportation Options  | Attraction of Young Professionals & Families  | Lack of Technical Assistance for Small Businesses  |
| Public Safety  | Regulations  | Greater Intermunicipal Cooperation  | Future Closure of the Canadian Border  |
| Access to Canadian Border  | Business Climate/Incentives  | More Housing Options  | Public Health Emergencies  |

Vision Statement

- No current LCLGRP B CEDS vision statement
- Current LCLGRP B Mission Statement

“Promoting sustainable economic development that strengthens our communities, provides quality jobs and preserves the unique natural, historical, and cultural characteristics of the region.”

- Proposed Vision Statement

“The LCLGRP B Region enjoys a lively entrepreneurial and business development sector that provides high-quality employment opportunities for its dynamic workforce who enjoy a high quality of life with stunning natural resources, world-class recreational opportunities, and vibrant community centers served by modern up-to-date infrastructure.”

Goals, Strategies, and Actions

- The CEDS document will be organized in the following manner:
 - Goals
 - Broad outcomes or general intentions that build upon the vision
 - Strategies
 - (aka Objectives) More specific, measurable, and support the obtainment of the goals
 - Actions
 - How we implement the strategy/goal

Goals

Six CEDS Goals

1. Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities
2. Enhance Quality of Life and Support Vibrant Community Centers
3. Promote Regional Collaboration and Outreach
4. Support Entrepreneurship & Business Development Opportunities
5. Improve Workforce Readiness
6. Preserve Natural Resources & Expand Recreational Opportunities

Strategies & Actions

Goal #1 | Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategies | Actions |
|---|--|
| <p>Identify needs and address water and sewer system affordability and sustainability</p> <p>1.1</p> | <ul style="list-style-type: none"> • Complete regional assessment of water and sewer facilities • Support creation of First Capital Grant Fund to facilitate first expenses of expanding or establishing water/wastewater infrastructure • Improve awareness of state and federal funding opportunities for improving infrastructure • Support coordination of inter-municipal stakeholders to facilitate implementation of the Regional Sewer Infrastructure Consolidation & Upgrade Report (Glens Falls, Queensbury, Kingsbury, Washington County Sewer District #2, Moreau) |
| <p>Assist communities access funding for municipal drinking water and wastewater improvements</p> <p>1.2</p> | <p>*See next slide</p> |
| <p>Eliminate barriers to improve access to broadband and telecommunications services</p> <p>1.3</p> | <ul style="list-style-type: none"> • Complete broadband and telecommunications deployment strategy • Launch pilot broadband deployment and small cell cellular project • Complete cellular infrastructure plan and project pre-permitting to identify coverage gaps, identify appropriate sites and technology, obtain contracts and permits, and then identify funding to incentivize development |
| <p>Develop solutions to rural, inter-community transportation for residents, local workforce, and visitors</p> <p>1.4</p> | <p>Develop and/or update rural transportation strategies</p> |

Strategies & Actions

Goal #1 | Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategy 1.2A Assist local governments access funding for regionally significant municipal DRINKING WATER improvements | Strategy 1.2B Assist local governments access funding for regionally significant municipal WASTEWATER improvements |
|---|--|
| <ul style="list-style-type: none">• New water treatment plant, Rouses Point• Drinking well improvements, Long Lake• Install new drinking well, Warrensburg• Drinking water system improvements, Greenwich (V)• Village of Speculator public water system upgrades• Diamond Point Water District Improvements, Lake George• Eagle Lake Water District formation and improvements, Ticonderoga• Morrisonville water district update, Schuyler Falls• Bolton, Phase II and III - Water Source and Distribution System Upgrades• Creek Road Water Main Replacement, Crown Point• Drinking well improvements, North Hudson• Drinking water improvements, Jay• Retrofit/replace aging drinking water purification systems with infrared purification systems, Whitehall (V)• Extend municipal water service to Hamilton County IDA site in Speculator• Drinking water system improvements, Plattsburgh• North Hudson well water upgrades | <ul style="list-style-type: none">• Feasibility study to support installation of municipal sewer system, Salem• Upgrades to WWTP including chlorination, Speculator (V)• Schroon Wastewater Collection Main Upgrade (Rogers Brook)• Construction of North Creek sewer system, Johnsburg• Replace aging pump station generators and pumps, Whitehall (V)• Collection System upgrades, Crown Point• Expand sewer capability, Hudson Falls• Complete improvements in Sewer District FE1A, Washington Co• Wastewater System upgrade and expansion, Greenwich (V)• Lakeshore Drive Sewer District, Lake George• Bolton, Phase II Wastewater Treatment Plant and Distribution System Upgrades• Lagoon upgrades and disinfection, Jay• Installation of municipal sewer system, Cambridge (V)• Improvements to the Glens Falls Wastewater Treatment Plant and Combined Sewer Overflow (CSO) |

Strategies & Actions

Goal #1 | Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities

| Strategies | Actions |
|--|---|
| <p>Support the development of initiatives that reduce the disposal of organic waste materials (food scraps) and expand markets for recyclable materials</p> <p>1.5</p> | <ul style="list-style-type: none"> • Support establishment of regional food scraps diversion program, composting facility, and establish pilot program for community composting • Explore feasibility for biodigester renewable energy generation from municipal waste, food waste and dairy waste. |
| <p>Support greater utilization of renewable energy and building weatherization by local governments, residents, and businesses to reduce energy costs and combat climate change</p> <p>1.6</p> | <ul style="list-style-type: none"> • Support installation of solar array at Lake George WWTP • Expand awareness of clean energy programs, such as Community Choice Aggregation, Community Solar, and Commercial Property Assessed Clean Energy (C-PACE) financing for energy efficiency and renewable energy improvements |
| <p>Prepare the region for greater utilization of electric vehicles (EV) through the installation of EV charging infrastructure</p> <p>1.7</p> | <ul style="list-style-type: none"> • Leverage available tools through NYSERDA and technical resources from CDRPC and ANCA to deploy EV infrastructure |
| <p>Support the extension of infrastructure to support shovel-ready industrial and commercial development areas</p> <p>1.8</p> | <ul style="list-style-type: none"> • Support the extension of electrical service to the Plattsburgh Industrial Park • Infrastructure to Canalside Energy Park • Infrastructure to Hamilton County IDA site in Speculator |

Strategies & Actions

Goal #2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategies | Actions |
|--|---|
| <p>Strengthen downtowns and community centers that serve as 2.1 anchors for regional economic activity</p> | <ul style="list-style-type: none"> • Promote the region as an attractive place for young professionals • Establish Regional Main Street Alliance Program to provide technical support for hamlet/main street planning and placemaking • Complete main street redevelopment site assessments • Support streetscape improvement projects and programs, like the Indian Lake Common's Hamlet Revitalization Project or Ticonderoga Montcalm Street Partnership • Promote "Complete Streets" streetscapes in downtown community centers • Support downtown business assistance programs, such as AEDC's, Main Street Sustainable Growth Program • Promote land use plans and codes that incentivize and facilitate the redevelopment of existing structures and encourage infill development |
| <p>Create economic opportunity through improved access to child 2.2 care</p> | <ul style="list-style-type: none"> • Support establishment of a staffed family child care network • Recruit, train, and open more homebased child care • Support regional childcare advocates in their efforts to increase childcare provider revenue potential |
| <p>2.3 Support development of diverse and affordable housing options</p> | <ul style="list-style-type: none"> • Develop regional housing assessment and strategy • Create LCLG Regional land bank • Create and deploy a regional housing portal • Support the development of prefabricated housing factory in Adirondack Park • Support creation of program to rehabilitate underutilized housing stock |

Strategies & Actions

Goal #2 | Enhance Quality of Life and Support Vibrant Community Centers

| Strategies | | Actions |
|------------|---|---|
| 2.4 | Support the provision of rural health care services | <ul style="list-style-type: none"> • Support and replicate existing mobile health care providers • Explore developing rural health care housing program • Expand access to health and wellness programs, including mental health services |
| 2.5 | Support access to local food and value-added agricultural products | <ul style="list-style-type: none"> • Conduct a regional food assessment • Support local cooperative food programs, like Adirondack Harvest |
| 2.6 | Improve economic opportunities and address barriers affecting traditionally underrepresented residents, including Black, Indigenous, & People of Color (BIPOC), LGBTQA+, disabled, women, veterans, and low/moderate income residents | <ul style="list-style-type: none"> • Improve integration of diversity and equity awareness and programming into LCLGRPB work program. • Support culturally competent leadership training and community outreach • Support initiatives like Welcoming Diverse Workforce Training |
| 2.7 | Identify regional solutions to address sustainable emergency services staffing in rural areas | <ul style="list-style-type: none"> • Engage with Local Emergency Planning Committees (LEPC) and County Emergency Services Departments to develop solutions to staffing and training issues related to rural emergency services personnel (EMS/Fire) |
| 2.8 | Expand opportunities for brownfield redevelopment | <ul style="list-style-type: none"> • Pursue Brownfield Opportunity Area (BOA) designations in relevant geographies • Create a targeted brownfield inventory for the region which prioritizes properties based on redevelopment potential, while incorporating expected reuse access, community impacts, and other characteristics |

Strategies & Actions

Goal #3 | Promote Regional Collaboration and Outreach

| Strategies | | Actions |
|------------|---|---|
| 3.1 | Continue the LCLGRP's role as the regional coordinating economic development organization | <ul style="list-style-type: none">• Improve awareness of the LCLGRP as a regional research and planning partner and the region's only Economic Development District |
| 3.2 | Coordinate with stakeholders to address regional housing challenges | <ul style="list-style-type: none">• Establish regional coordination group and champion for housing |
| 3.3 | Implement regional economic development framework | <ul style="list-style-type: none">• Convene regular meetings of CEDS Strategy Committee or Regional Economic Partnership to monitor progress and adjust strategies• Identify economic development initiatives that are ideal for regional partnerships while also assisting with county and local projects |
| 3.4 | Improve access to technical assistance and training for local government officials | <ul style="list-style-type: none">• Provide technical assistance to communities lacking local capacity |

Strategies & Actions

Goal #3 | Promote Regional Collaboration and Outreach

| Strategies | Actions |
|---|--|
| <p>Improve engagement with the Adirondack/Glens Falls Transportation Council (A/GFTC), the Metropolitan Planning Organization (MPO) for 3.5 Warren and Washington Counties</p> | <ul style="list-style-type: none"> • Maximize utilization of the Transportation Improvement Plan (TIP) to advance bicycle, pedestrian, and vehicular improvements, especially if complimentary to initiatives of the LCLGRP |
| <p>Implement a “hub and spoke” model between the EDD and local economic development organizations and chambers of commerce for 3.6 improved communication, data sharing, and program delivery</p> | <ul style="list-style-type: none"> • Utilize the LCLGRP’s Business Retention & Expansion Program |
| <p>Foster collaboration between high schools, community colleges, career and technical education (CTE) groups, workforce development boards, 3.7 and industries</p> | <ul style="list-style-type: none"> • Develop and improve training opportunities that align with education skills |
| <p>Provide regular updates to regional stakeholders about regional economic indicators, through use of newsletters and other 3.8 communications</p> | <ul style="list-style-type: none"> • Monitor regional demographic and economic trends to address issues in real-time • Deploy and promote use of the LCLG Regional Economic Dashboard |

Strategies & Actions

Goal #4 | Support Entrepreneurship & Business Development Opportunities

| Strategies | | Actions |
|------------|---|---|
| 4.1 | Promote small business activity in community centers | <ul style="list-style-type: none"> • Match small businesses and startups with main street spaces • Support main street rent stabilization |
| 4.2 | Support business development assistance, including business succession planning and 1:1 business counseling | <ul style="list-style-type: none"> • Reimagine supply chain resilience through entrepreneurship • Coordinate cohorts for regional small business training and support • Hold startup pitch competition • Host a regular event series focused on networking and support • Promote awareness of business succession planning offered through ANCA's, North Country Center for Businesses in Transition |
| 4.3 | Ensure women, minorities, and veterans are accessing and engaging in the ecosystem | <ul style="list-style-type: none"> • Improve awareness of M/WBE and SDVOB Certification and other government procurement opportunities |
| 4.4 | Promote agribusiness and local food industries as a growth area for applicable parts of the region and to adapt to changes in the agricultural product supply chain | <ul style="list-style-type: none"> • Establish a regional agricultural hub • Explore mobile meat processing facilities |
| 4.5 | Strengthen existing industry clusters and develop emerging clusters within the region | <ul style="list-style-type: none"> • Support organizations that serve regional industry clusters • Conduct regional economic diversification assessment, including in-depth targeted industry analysis that identifies the linkages between targeted clusters |

Strategies & Actions

Goal #4 | Support Entrepreneurship & Business Development Opportunities

| Strategies | Actions |
|--|---|
| <p>4.6 Highlight the value of the U.S. - Canadian border to the regional economy</p> | <ul style="list-style-type: none"> • Monitor closures of the U.S. - Canadian border • Monitor cross-border economic activity and trends • Expand opportunities for Foreign Direct Investment (FDI) into the region, following models like the North Country Chamber of Commerce's NYMTL (Where New York Meets Montreal) Initiative |
| <p>4.7 Grow awareness and utilization of financial assistance resources available to businesses</p> | <ul style="list-style-type: none"> • Support creation of quick access to capital convertible loan to grant program • Promote existing small business loan programs, administered by the LCLGRPB |
| <p>4.8 Implement Forward Together Business Retention and Expansion Program</p> | <ul style="list-style-type: none"> • Tailor BRE Survey questions for real-time labor market information |
| <p>4.9 Collaborate with local and regional tourism stakeholders to improve tourist experiences in the region</p> | <ul style="list-style-type: none"> • Establish regional destination management planning working group • Implement Village of Lake George wayfinding and interpretive signage project • Implement Village of Whitehall wayfinding and interpretive signage project • Conduct feasibility assessment for construction of Ticonderoga Visitor Center |
| <p>4.10 Monitor the introduction of New York State Regulated Cannabis Industry, its economic impacts and opportunities</p> | <ul style="list-style-type: none"> • Follow updates from the New York State Cannabis Commission |

Strategies & Actions

Goal #5 | Improve Workforce Readiness

| Strategies | | Actions |
|------------|--|---|
| 5.1 | Improve career readiness of high school graduates | <ul style="list-style-type: none"> • Advocate for BOCES (CTE) Skill Building in place of study hall • Replicate "career jam" program across the region • Support initiatives that support minority and/or economically distressed students |
| 5.2 | Support improvements at regional higher education facilities that improve access to learning | <ul style="list-style-type: none"> • Support construction of Regional Higher Education Center to house the Learning Innovation Center (LiNC), which will support 10 state-of-the-art distance learning studios (SUNY ADK) • Support construction of Agricultural Business Center (SUNY ADK) |
| 5.3 | Explore transportation options for improving mobility to workplaces | <ul style="list-style-type: none"> • Advance summer housing and transportation program for J-1 student workers and SUNY ADK students, utilizing SUNY Adirondack dorms to assist area's hospitality industry |
| 5.4 | Support training opportunities to upskill the incumbent workforce | <ul style="list-style-type: none"> • Support training for advanced manufacturing (technicians) • Support opportunities for continuing education and training for job opportunities available in the region (water/sewer operators) • Support apprenticeship/internship programs • Improve understanding and develop programs that address underemployment and unemployment issues |

Strategies & Actions

Goal #6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategies | | Actions |
|------------|---|---|
| 6.1 | Showcase the region as a leader in climate protection | <ul style="list-style-type: none">• Implement the decarbonization of the forestry and paper industry through the Adirondack Advanced Wood Innovation Group |
| 6.2 | Continue to maintain high water quality in area waterbodies | <ul style="list-style-type: none">• Complete 9-Element Plan for the Upper Hudson Watershed• Continue collaboration with water quality strategy committees and lake associations• Address salt contamination of municipal drinking water sources• Promote winter road maintenance practices that reduce road salt pollution |
| 6.3 | Protect prime farmland from urban sprawl and promote the growth of agritourism to support access to local products and improve economic opportunities for local agricultural businesses | <ul style="list-style-type: none">• Implement priorities included in county Farmland Protection Plans (Essex and Washington Counties) |

Strategies & Actions

Goal #6 | Preserve Natural Resources & Expand Recreational Opportunities

| Strategies | | Actions |
|------------|--|---|
| 6.4 | Improve hazard mitigation and climate resiliency | <ul style="list-style-type: none"> Evaluate the capacity of utilities and infrastructure to withstand disaster. Prepare infrastructure and facilities for future climate change impacts (excessive heat, extreme weather) Complete flood attenuation plan for the LCLG Region |
| 6.5 | Support the development of multi-use trails and supportive infrastructure for existing outdoor recreation facilities | <ul style="list-style-type: none"> Complete improvements at former Frontier Town site in North Hudson Support expansion of the Hamilton County multi-use recreational trail system |
| 6.6 | Support project and programs that enhance access and functionality of local waterfronts | <ul style="list-style-type: none"> Support redevelopment of the Dunbarton Mill Site in Greenwich Support redevelopment of Town of Essex Marina |
| 6.7 | Advocate for the provision of adequate staff resources to manage regional recreation amenities | <ul style="list-style-type: none"> Support staff resources to manage boat inspection/decontamination stations and forest preserve lands |

Evaluation Framework

| | Goal | Metrics |
|----|---|---|
| 1. | Develop and Modernize Regional Infrastructure to Promote Equitable Economic Opportunities | <ul style="list-style-type: none"> • # of EV charging stations • # of new broadband internet connections • Awards for water, sewer, or broadband |
| 2. | Enhance Quality of Life and Support Vibrant Community Centers | <ul style="list-style-type: none"> • Population • Occupied housing units • Median household income • Racial/ethnic composition • Poverty % |
| 3. | Promote Regional Collaboration and Outreach | <ul style="list-style-type: none"> • Stakeholder meetings held or attended |
| 4. | Support Entrepreneurship & Business Development Opportunities | <ul style="list-style-type: none"> • Small business loans issued • New M/WBE or SDVOB Certifications |
| 5. | Improve Workforce Readiness | <ul style="list-style-type: none"> • Labor force participation % • Unemployment % • Student enrollment • Student graduation % • Education attainment |
| 6. | Preserve Natural Resources & Expand Recreational Opportunities | <ul style="list-style-type: none"> • Number of recreational amenities • Acres of farmland conserved |

Appendix C



SWOT SURVEY RESULTS

Lake Champlain – Lake George Regional Planning Board

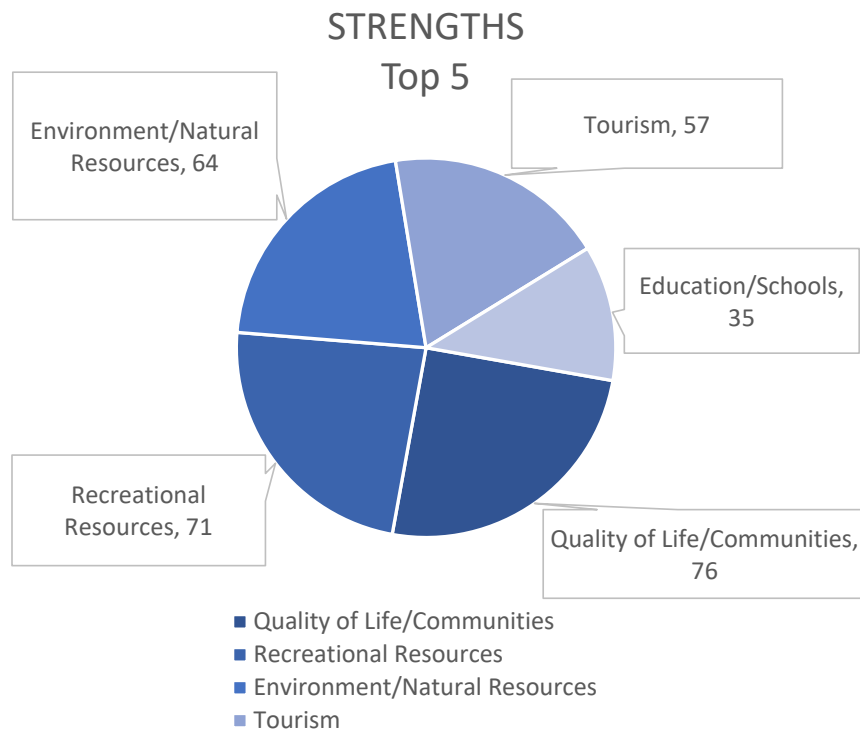
Economic Development District

2022-2027 Comprehensive Economic Development Strategy (CEDS)

SWOT Survey Responses

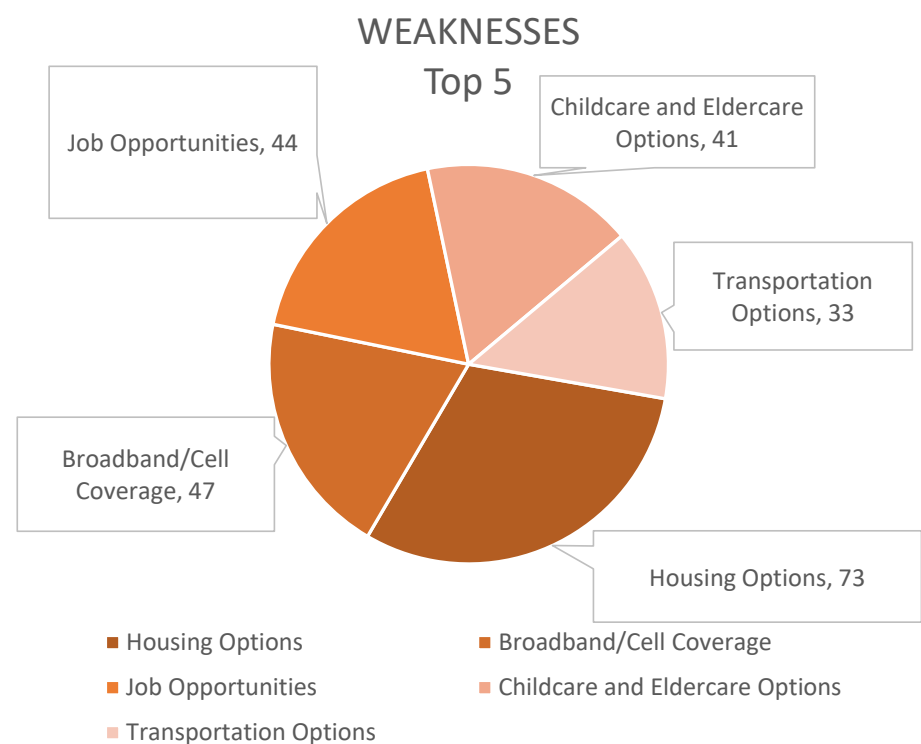
| Geographic Area | Number of Responses | % |
|------------------------|---------------------|-----|
| Clinton County | 10 | 10% |
| Essex County | 28 | 29% |
| Hamilton County | 9 | 9% |
| Warren County | 17 | 17% |
| Washington County | 14 | 14% |
| Regional Stakeholders | 20 | 21% |
| Total Responses | 98 | |

SWOT Survey Results | STRENGTHS



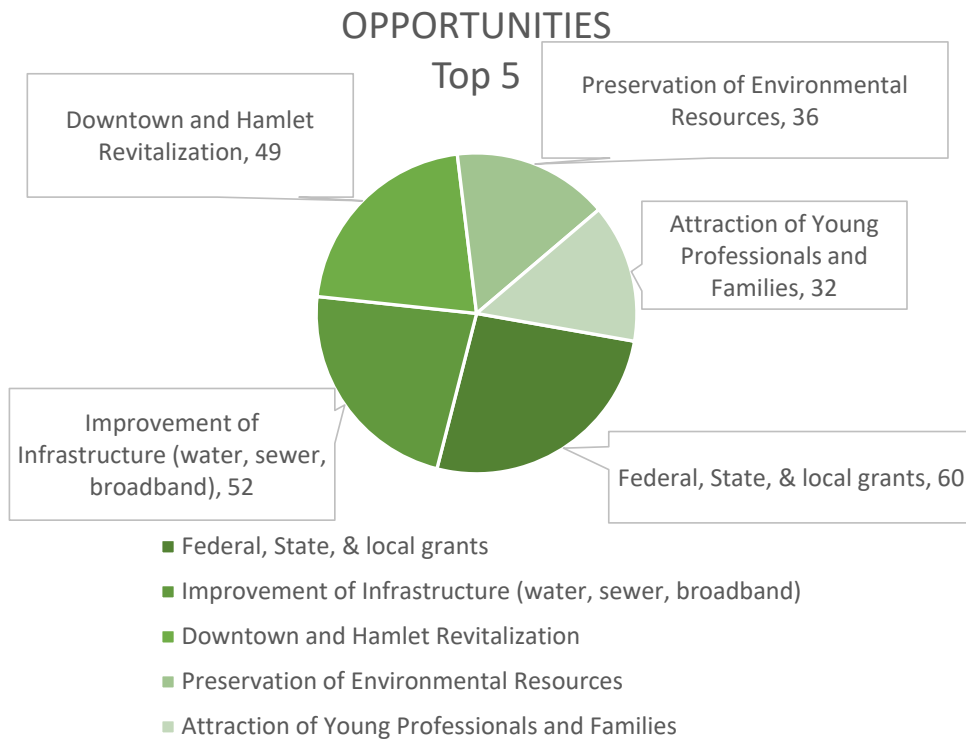
| Other Strengths | Total |
|---|-------|
| Public Safety | 15 |
| Access to Canadian Border | 14 |
| Responsive Government | 13 |
| Access Healthcare | 11 |
| Access to Transportation Routes | 10 |
| Job Opportunities | 6 |
| Business Climate/Incentives | 5 |
| Infrastructure Availability | 5 |
| Housing Options | 4 |
| Innovation | 1 |
| Transportation Options | 1 |
| Childcare and Eldercare Options | 1 |
| Diverse agricultural production by small farms, access to diverse local food products | 1 |
| Workforce Skills | 0 |

SWOT Survey Results | WEAKNESSES



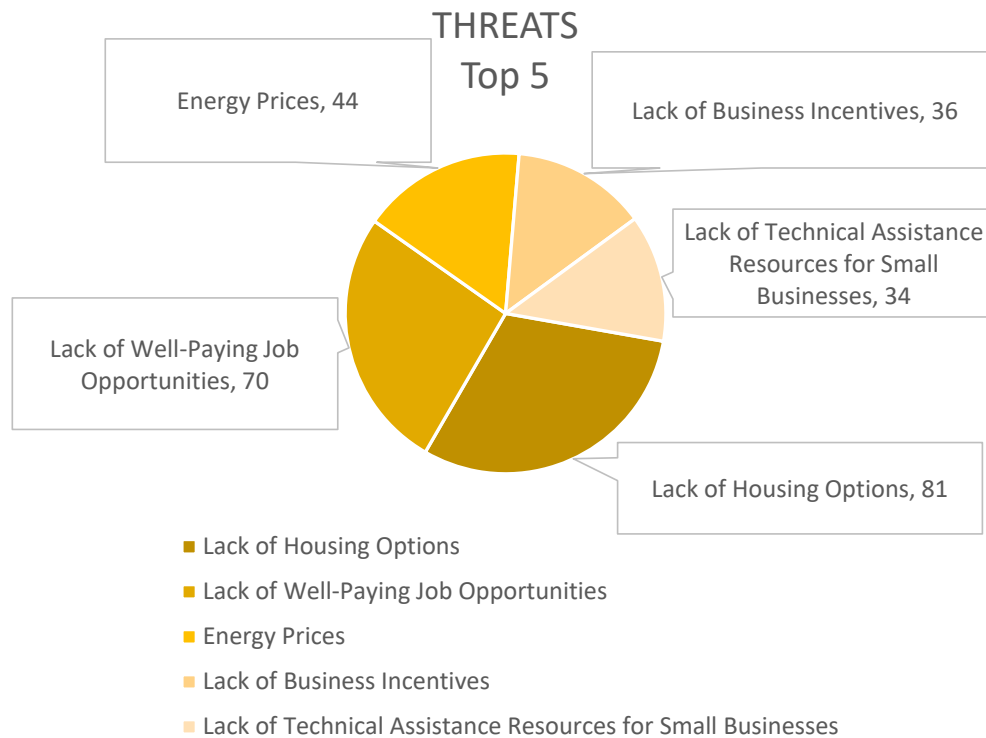
| Other Weaknesses | Total |
|---------------------------------|-------|
| Regulations | 27 |
| Business Climate/Incentives | 19 |
| Infrastructure Availability | 18 |
| Age Characteristics | 15 |
| Workforce Skills | 15 |
| Quality of Infrastructure | 8 |
| Brownfields/Blight | 8 |
| Innovation | 7 |
| Access to Transportation Routes | 6 |
| Responsive Government | 5 |
| Food Access | 5 |
| Education/Schools | 4 |
| Access Healthcare | 3 |
| Public Safety | 2 |
| Quality of Life/Communities | 1 |
| Proactive Government | 1 |
| Lack of Available Real Estate | 1 |
| Diversity | 1 |
| High Taxes | 1 |
| Environment/Natural Resources | 0 |

SWOT Survey Results | OPPORTUNITIES



| Other Opportunities | Total |
|--|-------|
| Greater Intermunicipal Cooperation | 31 |
| More Housing Options | 30 |
| Improved Workforce Training | 23 |
| Improved Awareness of Business Assistance Programs | 17 |
| Access to Business Capital | 15 |
| Greater Diversity and Equity | 15 |
| Localization of Supply Chains | 13 |
| Other | 1 |
| Ubiquitous Cell Service | 1 |

SWOT Survey Results | THREATS



| Other Threats | Total |
|---|-------|
| Public Health Emergencies (e.g. COVID-19) | 27 |
| Future Closure of the Canadian Border | 26 |
| Natural Disasters/Impact of Climate Change | 13 |
| Lack of Access to Foreign Supply Chains | 11 |
| Other | 9 |
| Failing and unaffordable infrastructure upgrades to our small districts | 1 |
| Seems there are various well paying jobs. But in surveying various food system businesses, hearing across the board, biggest threat is lack of labor. Various jobs, including government jobs, are paid pretty well for our low cost of living in the area. | 1 |
| Lack of cell coverage and broadband | 1 |
| Lack of childcare | 1 |
| Population declines - rising median age | 1 |
| General lack of programming and funding scaled to rural america and rural NY | 1 |
| Lack of broadband & cell | 1 |
| Lack of infrastructure (broadband specifically for Washington County) | 1 |
| Increased cost of basic infrastructure (sewer and water) | 1 |

Appendix D



FORWARD *together*

Economic Resiliency Plan

OCTOBER 2021



LAKE CHAMPLAIN-LAKE GEORGE

**REGIONAL
PLANNING**

PREPARED BY

Chazen
A LaBella Company

 camoin
associates

sidekick
CREATIVE



FORWARD
together
Economic Resiliency Plan

TABLE OF CONTENTS

- 05 What is the Lake Champlain-Lake George Region?
- 06 Plan Overview
- 07 The LCLG Region's Economy At a Glance
- 09 The Region's Workforce
 - 11 Foundational Assets
 - 21 Competitive Assets
- 23 Key Sectors
- 30 Moving the Region's Economy Forward, Together

APPENDICES

- A 5-County Region Economic Profile
- B 5-County Region Economic Resiliency Analysis
- C Housing Gap Analysis
- D Infrastructure Inventory
- E Implementation Matrix

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

ADDITIONAL THANKS TO

Mary Barnhart • Victory View Vineyard
Mark Behan • Behan Communications
Rebecca Breese • Holly & Vine Vineyard
Mark Brown • Brown's Tree Farm
Carol Calabrese • Essex County IDA
George Cordes • Adirondack Lakes Center for the Arts
Matthew Courtright • Ticonderoga Area Chamber of Commerce
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
Sylvia Getman • Adirondack Health
Brian Gilchrist • Cornell Cooperative Extension
Todd Giroux • Clinton County Farm Bureau
Juan Gonzales • Hunt Companies
Beth Hill • Fort Ticonderoga
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
Shannon Wilkins • Rulfs Orchard
Christy Wilt • Hamilton County IDA
Joel Wood • NAmTrans
Donna Wotton • Ticonderoga Revitalization Alliance



The preparation of this report was financially aided through a federal CARES Act grant from the U.S. Department of Commerce Economic Development Administration.

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.

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

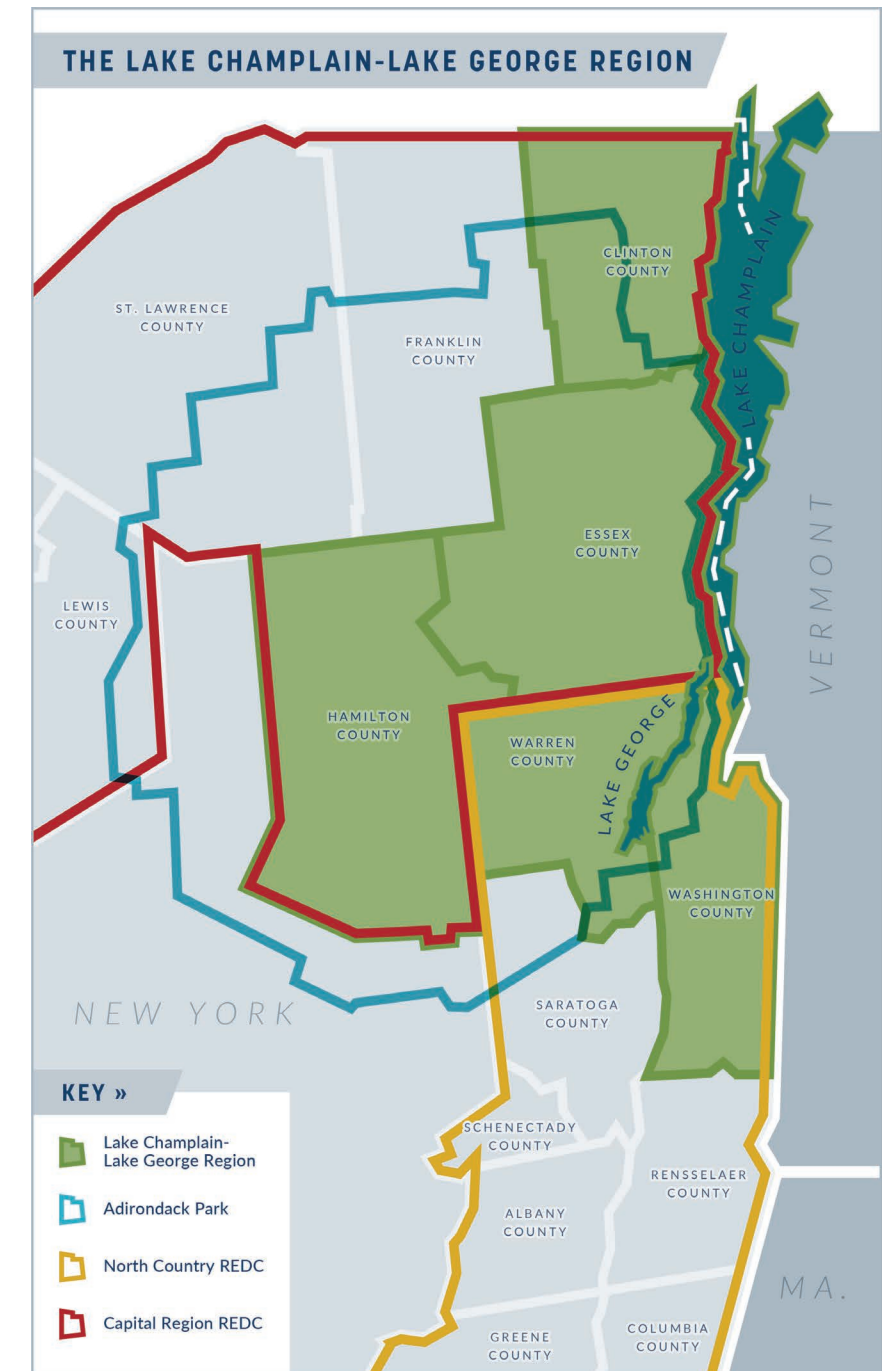
**"Never let a good
crisis go to waste."
- Sir Winston Churchill**

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

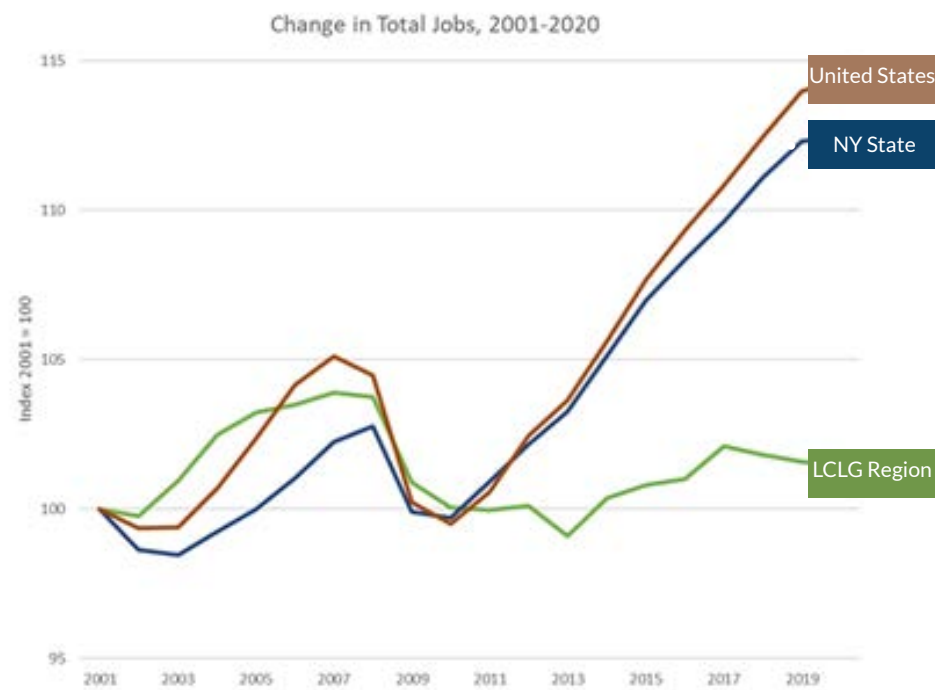
Before the onset of the pandemic (early 2020), there were over 113,000 jobs in the LCLG Region. Most of the jobs in the region are located in Warren County (36%) and Clinton County (33%), the two counties with the highest population and with the largest population centers, as noted above. Washington 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.¹ 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

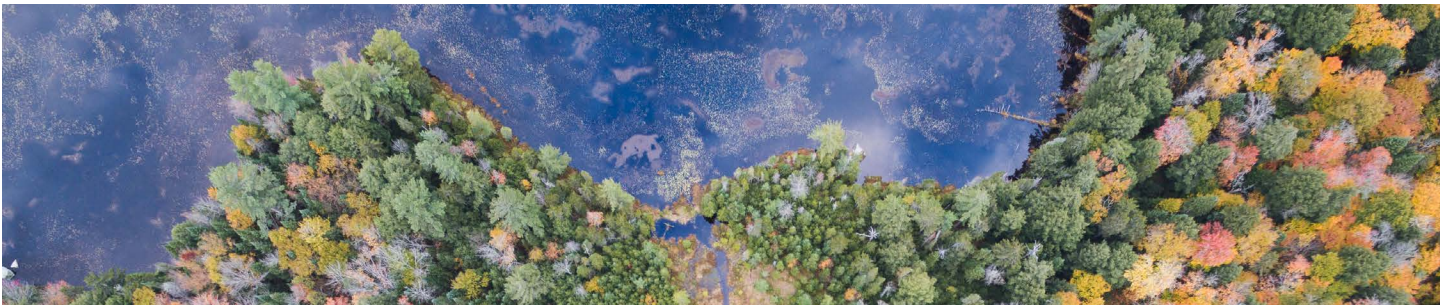
Adirondack real estate boom hasn't let up a year into the pandemic

BY ELIZABETH HILL/2020 (ADIRONDACK DAILY ENTERPRISE), IN SARANAC LAKE, NY

Jun 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

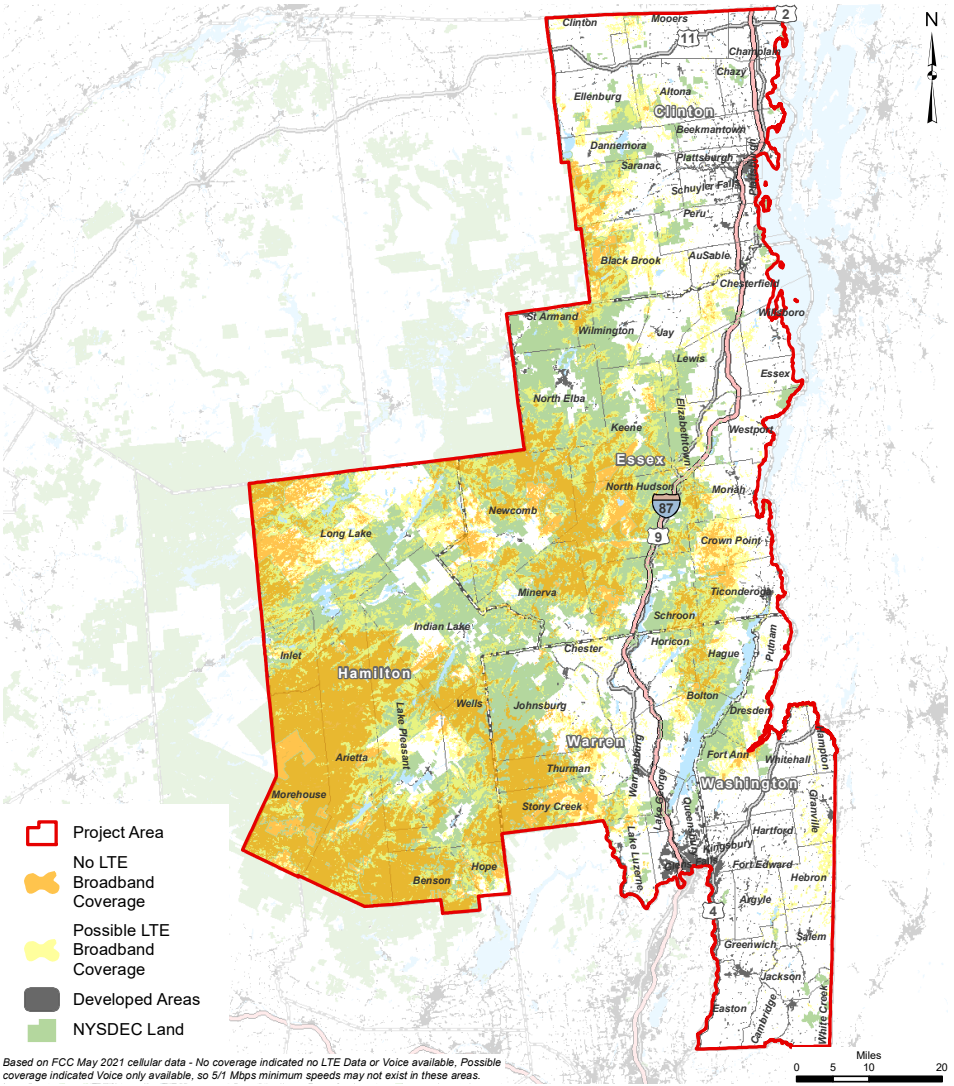
number of home sales in the Northern Adirondacks was up over 53%², resulting in fewer homes on the market than there have been since 2006.³ And housing demand is not set to let up: a March 2021 Adirondack Relocation Assessment survey commissioned by ROOST and Warren County EDC estimated the demand for 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.

ISSUES

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

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 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.”⁴ 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,⁵ yearly lost earnings, productivity, and revenue for U.S. businesses totals \$57 billion when quality, affordable child care is not available.⁶

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.⁷

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

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



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.

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

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.

ISSUES

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

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

benefit of \$2.20.⁸

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.⁹

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

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

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 “sub-urb 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

HEALTH CARE

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

10,000; only 2% want to live in towns of 25,000 or fewer." In the LCLG Region, all five counties are in designated Health Professional Shortage Areas (HPSAs). 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.¹²

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.¹³ 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



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

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.

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.

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.¹⁴

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

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.

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

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

15.9%

Percentage of the region's GRP

9.1%

Percentage of the region's jobs

157

Jobs added in the sector (2015-2020)

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."¹⁵

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

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

- spaces in need of assessment, collecting and organizing as much existing data as possible about each site
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.

- 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



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.

- 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.

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.

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.

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

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

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 LCLGRPB 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 LCLGRPB, 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 LCLGRPB 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 LCLGRPB, 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.

39

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

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

² Northern Adirondack Board of Realtors, March 2021 Market report.

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

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

⁵ NYS Workforce Development Initiative

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

⁷ NYS Workforce Development Initiative

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

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

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

¹¹ U.S. Health Resources & Services Administration data, accessed August 12, 2021.

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

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

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

¹⁵ <http://www.oppex.org>



Chazen
A LaBella Company


 **camoin**
associates

sidekick
CREATIVE

THANK YOU



Beth Gilles, Executive Director • Beth.gilles@lclgrpb.org • 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. You can also find us on Twitter [@camoinassociate](#) and on [Facebook](#) and [LinkedIn](#).

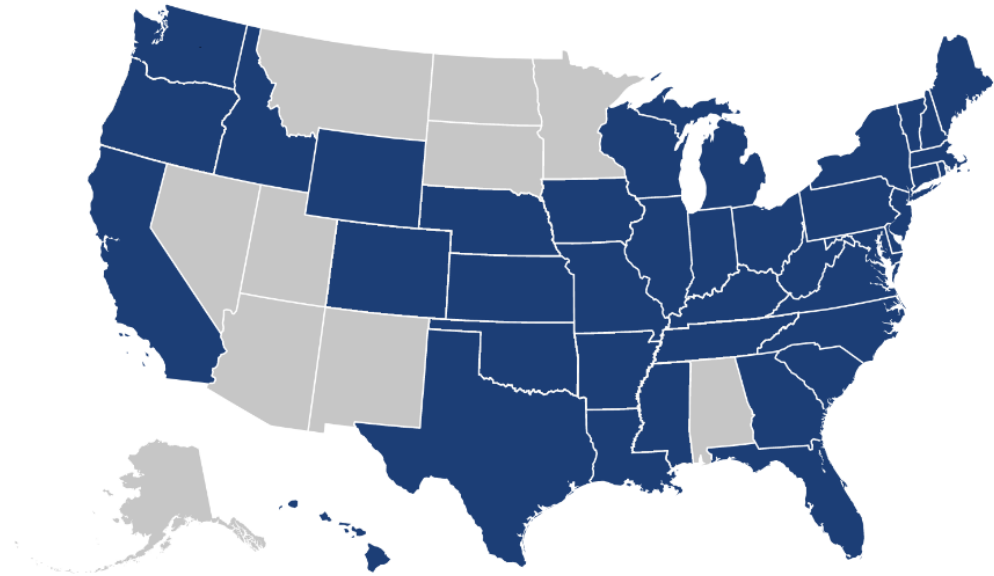
THE PROJECT TEAM

Christa O. Franzi
Principal

Alex Tranmer
Project Manager

Tom Dworetsky
Lead Analyst

Aaron Metheny
Analyst





Long Lake, Hamilton County

CONTENTS

| | |
|---|----|
| Key Findings | 1 |
| Methodology | 3 |
| Demographic and Socioeconomic Profile | 4 |
| Industry Analysis | 16 |
| Agricultural Snapshot | 35 |
| Talent and Workforce Evaluation | 41 |
| Housing Market Trends | 50 |
| Attachment A: Data Sources | 54 |

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 reimaged. 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 |
|-----------------------------------|-------------|-------------|-------------|--------------------|--------------------|
| Lake Champlain Lake George Region | | | | | |
| 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% |
| New York | | | | | |
| 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% |
| United States | | | | | |
| 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 |
|-------------------------|--------|----------|----------|---------------------------|---------------------------|-------------------------|--------|----------|----------|---------------------------|---------------------------|
| Clinton County | | | | | | Warren County | | | | | |
| 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% |
| Essex County | | | | | | Washington County | | | | | |
| 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% |
| Hamilton County | | | | | | | | | | | |
| 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% | | | | | | |

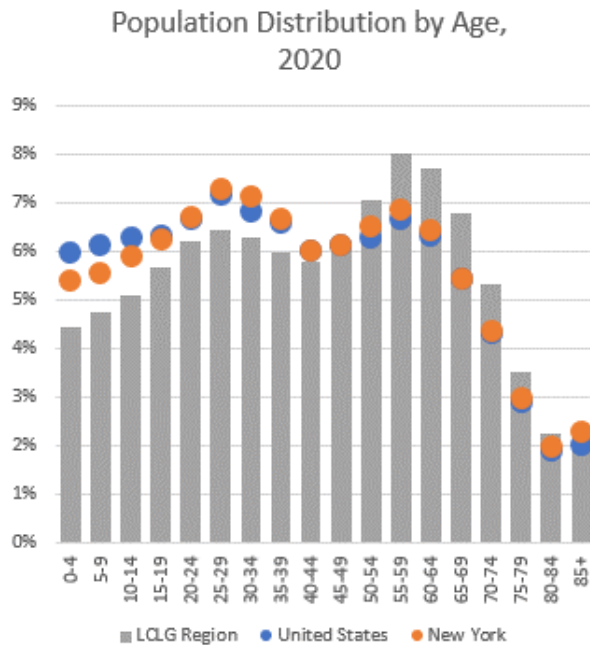
Source: Esri

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

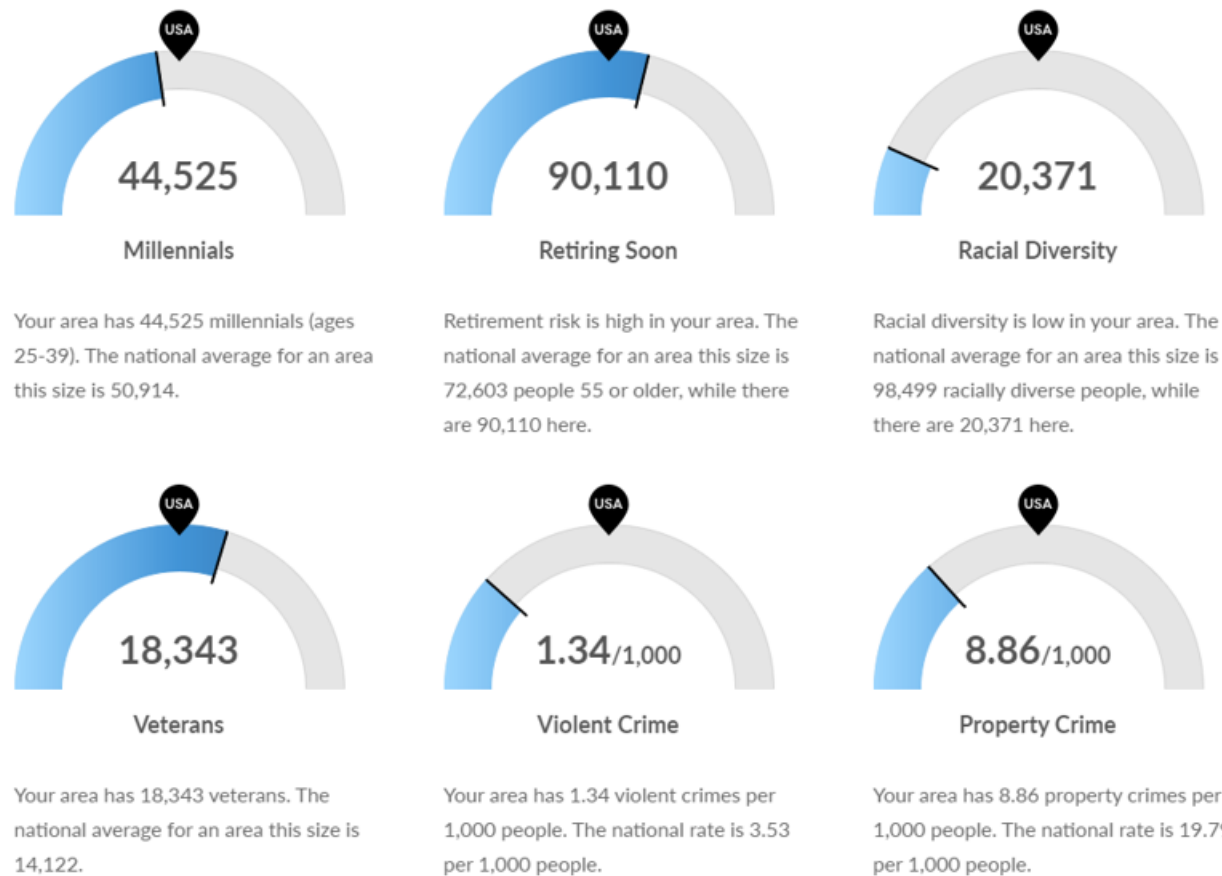
Population by Age Cohort, 2020

| 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% |
| Total Age <18 | 22.0% | 20.4% | 16.8% | 17.3% | 13.9% | 17.6% | 18.4% |
| Total Age 18+ | 78.0% | 79.6% | 83.2% | 82.8% | 86.1% | 82.4% | 81.6% |
| Total Age 18-65 | 61.4% | 62.5% | 65.7% | 59.5% | 57.8% | 60.0% | 62.1% |
| Total Age 65+ | 16.6% | 17.1% | 17.5% | 23.3% | 28.3% | 22.4% | 19.5% |

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

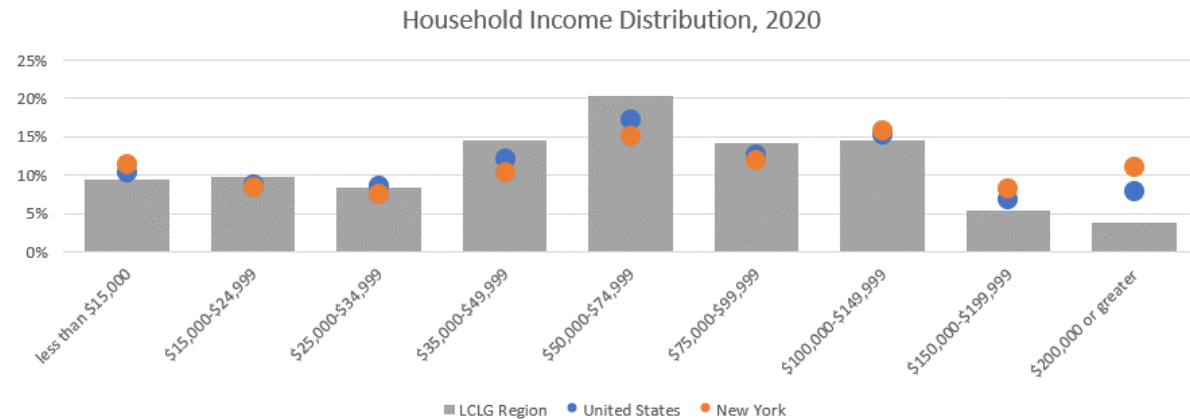


Table 4

Household Income Distribution, 2020

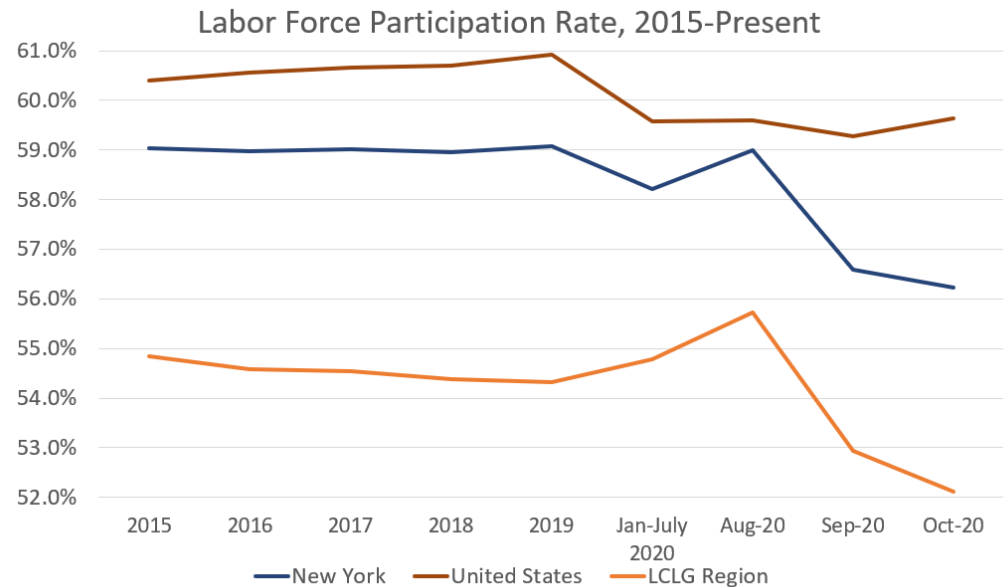
| Income Range | Clinton County | Essex County | Hamilton County | Warren County | Washington County |
|--------------------------------|-----------------|-----------------|-----------------|-----------------|-------------------|
| less than \$15,000 | 10.64% | 9.33% | 8.95% | 7.25% | 10.50% |
| \$15,000-\$24,999 | 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% |
| Median Household Income | \$59,265 | \$53,890 | \$56,206 | \$58,101 | \$56,989 |

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



Source: Emsi

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

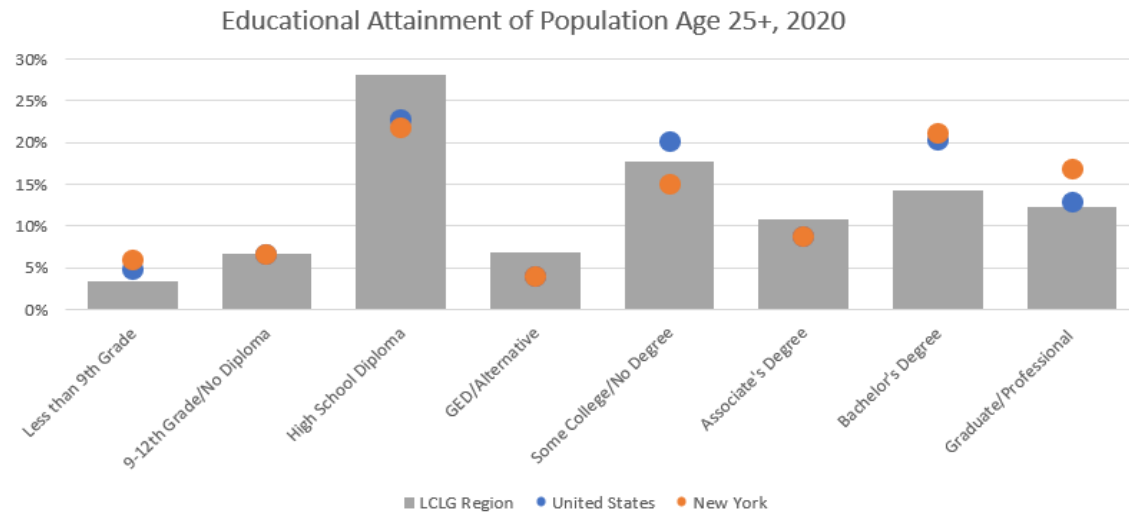


Table 5

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% |
| High School/Equivalent or Higher (includes GED) | 89% | 92% | 84% | 92% | 88% | 90% | 87% | 89% |
| Bachelor's Degree or Higher | 25% | 30% | 21% | 32% | 22% | 27% | 38% | 33% |

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

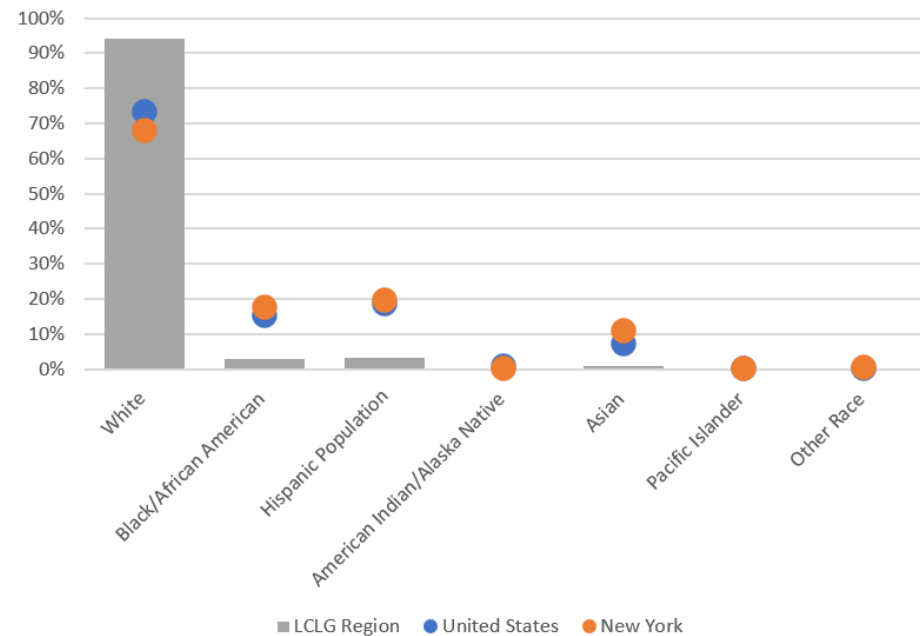


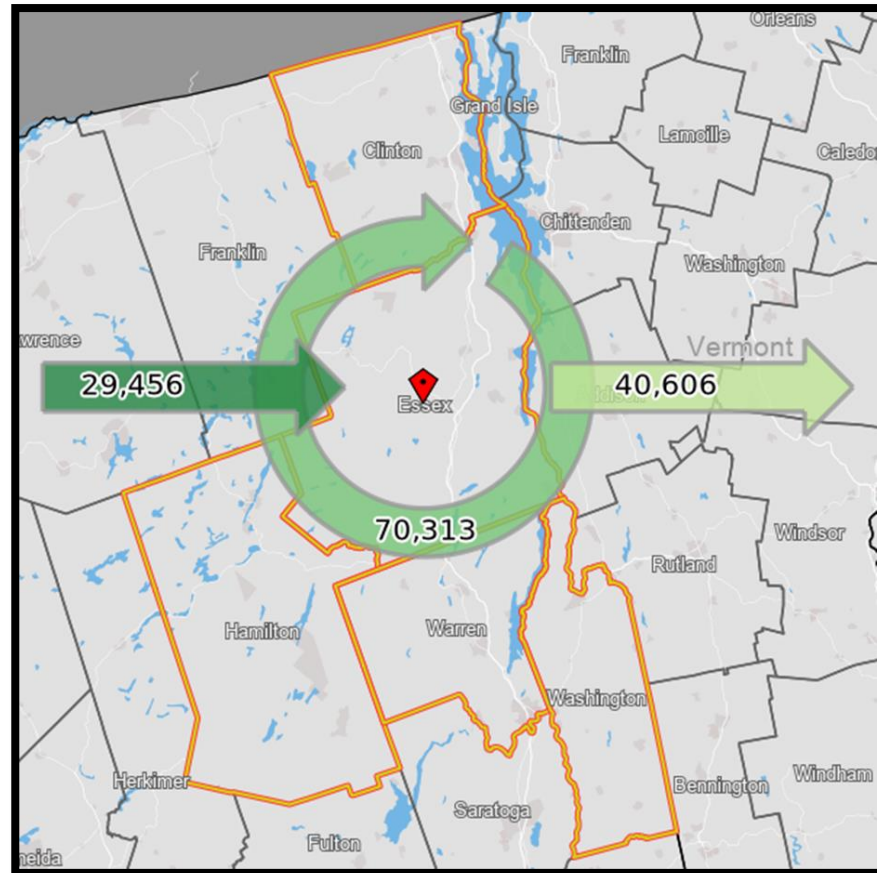
Table 6
Population by Race, 2020

| 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% |
| Total | 99,769 | 100.0% |
| Resident Workers | | |
| Out-Commuters | 40,606 | 36.6% |
| Employed and Live in Region | 70,313 | 63.4% |
| Total | 110,919 | 100.0% |

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.

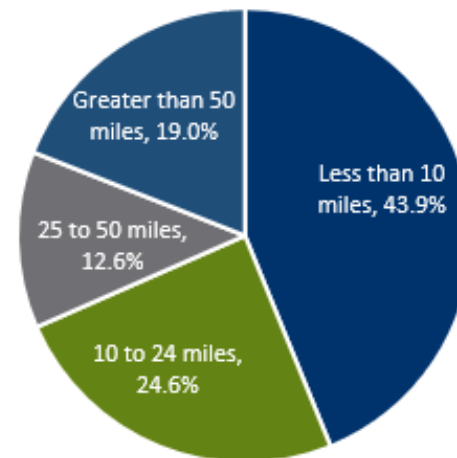
Where LCLG Counties' Residents Work, 2018

| | <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% |
| <i>Saratoga County, NY</i> | 9,679 | 9% |
| <i>Albany County, NY</i> | 5,383 | 5% |
| <i>Franklin County, NY</i> | 2,226 | 2% |
| <i>Rutland County, VT</i> | 1,524 | 1% |
| <i>St. Lawrence County, NY</i> | 1,503 | 1% |
| <i>Schenectady County, NY</i> | 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 |
| Total | 37,183 | 16,189 | 2,122 | 40,416 | 17,305 | 113,215 |
| Percent of Total LCLG Region Jobs | 33% | 14% | 2% | 36% | 15% | 100% |

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 | 0.2% | 0.4% | <0.5% | 1.5% | 0.1% | 0.7% |
| 56 Administrative and Support and Waste Management and Remediation Services | 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% |

Source: Emsi

*Darker green indicates higher percentages.

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

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

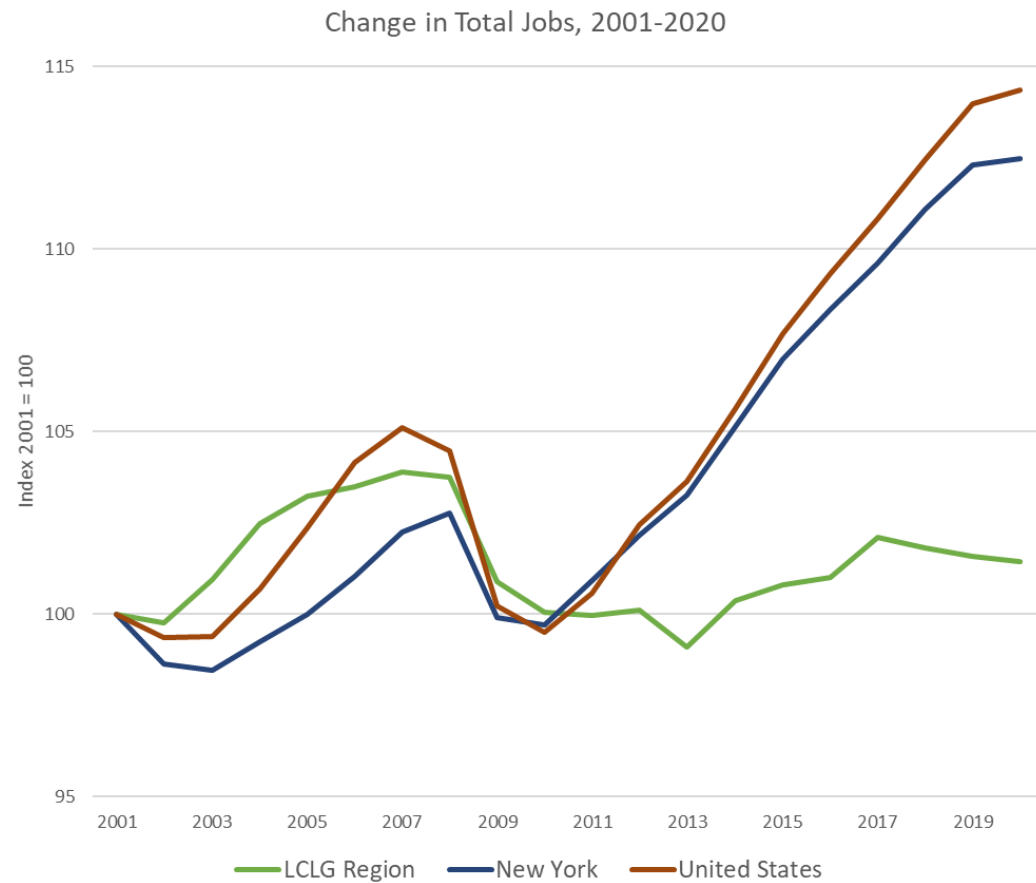
| NAICS | Description | 2015 Jobs | 2020 Jobs | 2015 - 2020 Change | 2015 - 2020 % Change | Avg. Earnings Per Job |
|--------------|--|----------------|----------------|--------------------|----------------------|-----------------------|
| 11 | Agriculture, Forestry, Fishing and Hunting | 2,626 | 2,473 | (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 |
| Total | | 112,525 | 113,215 | 690 | 1% | \$57,124 |

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 |
| Total | | \$59,072 | \$54,072 | \$50,945 | \$55,989 | \$59,204 |

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

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

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 |
|-----------|---|-----------|-----------|--------------------|----------------------|-----------------------|-------------------|
| Growing | | | | | | | |
| 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 |
| Shrinking | | | | | | | |
| 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

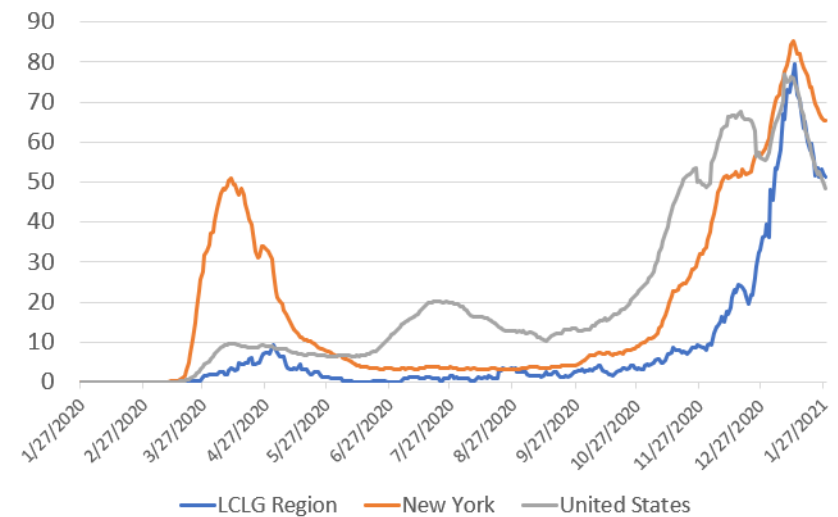
Industries listed above are those that have more than 250 jobs in the region, have added jobs over the last five years, and have location quotients greater than 2.0.

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).

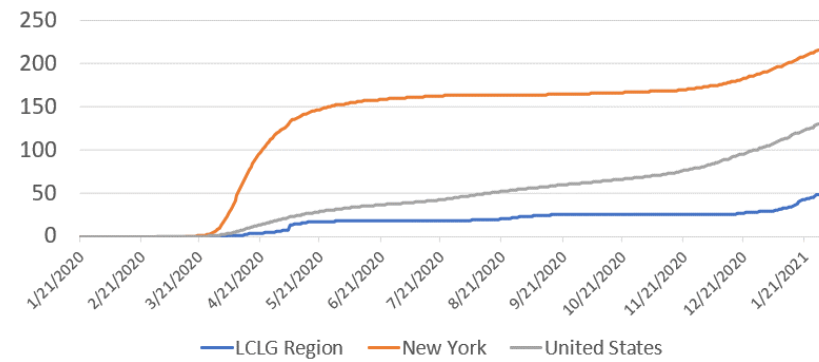
Figure 7

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

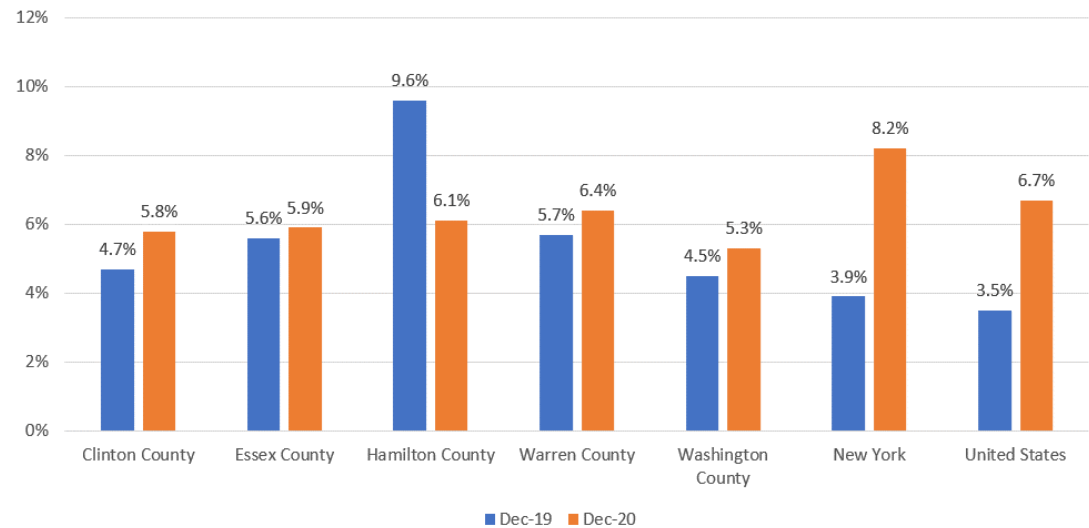
Unemployment Comparison

| 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.

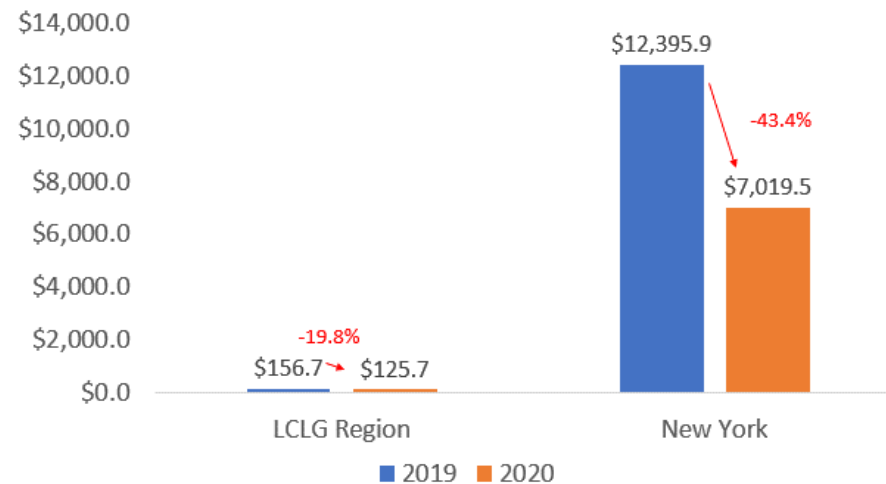
Table 20

| 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. \$)



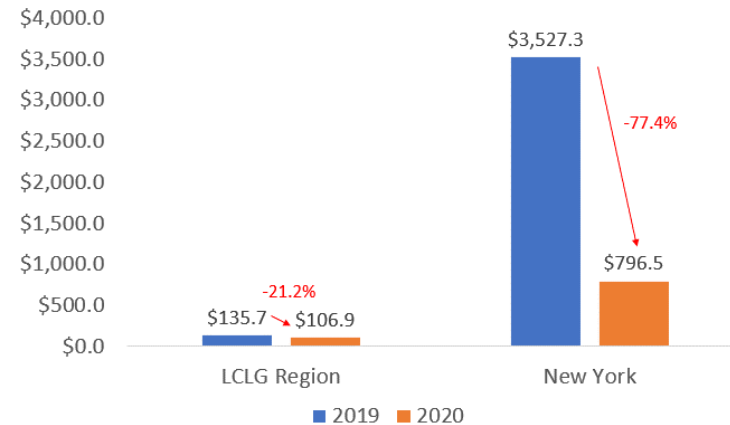
Source: New York State Department of Taxation and Finance

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

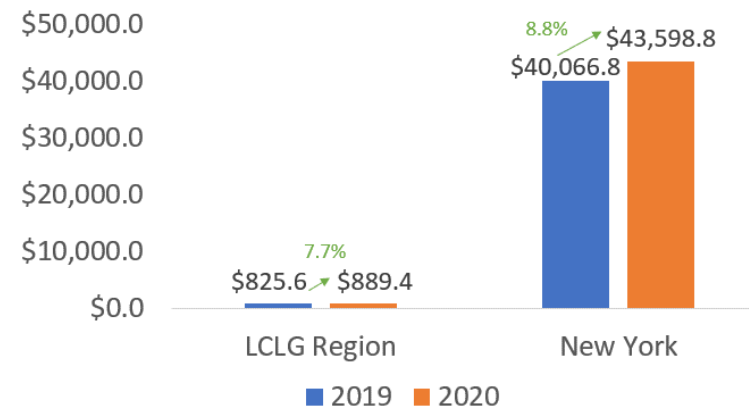
Travel Accommodations: Taxable Sales and Purchases, Jun-Aug (Mil. \$)



Source: New York State Department of Taxation and Finance

Figure 12

Purchases, Jun-Aug (Mil. \$)



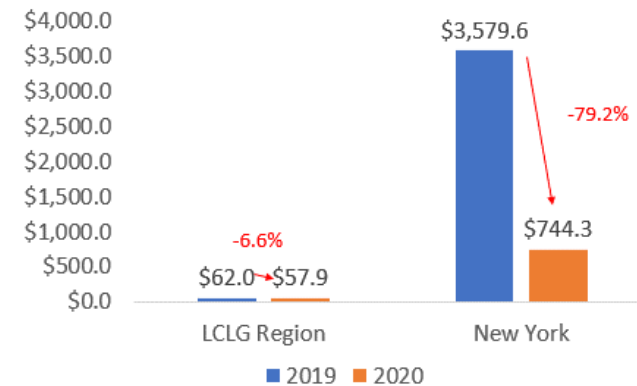
Source: New York State Department of Taxation and Finance

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

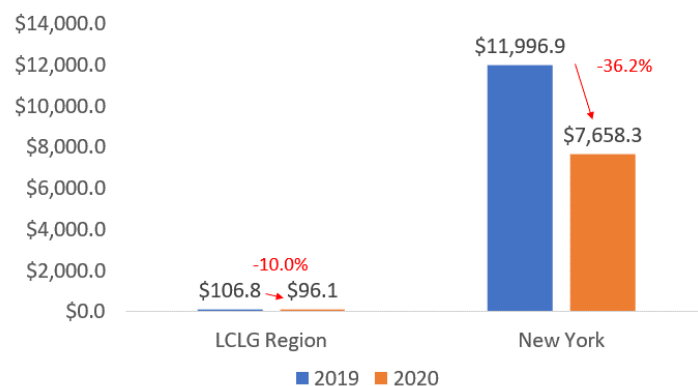
Travel Accommodations: Taxable Sales and Purchases, Sept-Nov (Mil. \$)



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% |
| Total | 1,882 | | 415,536 | | | | | | |

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.

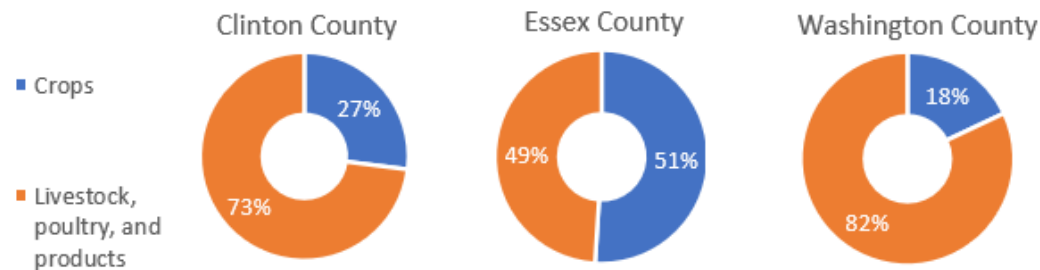
Table 22

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

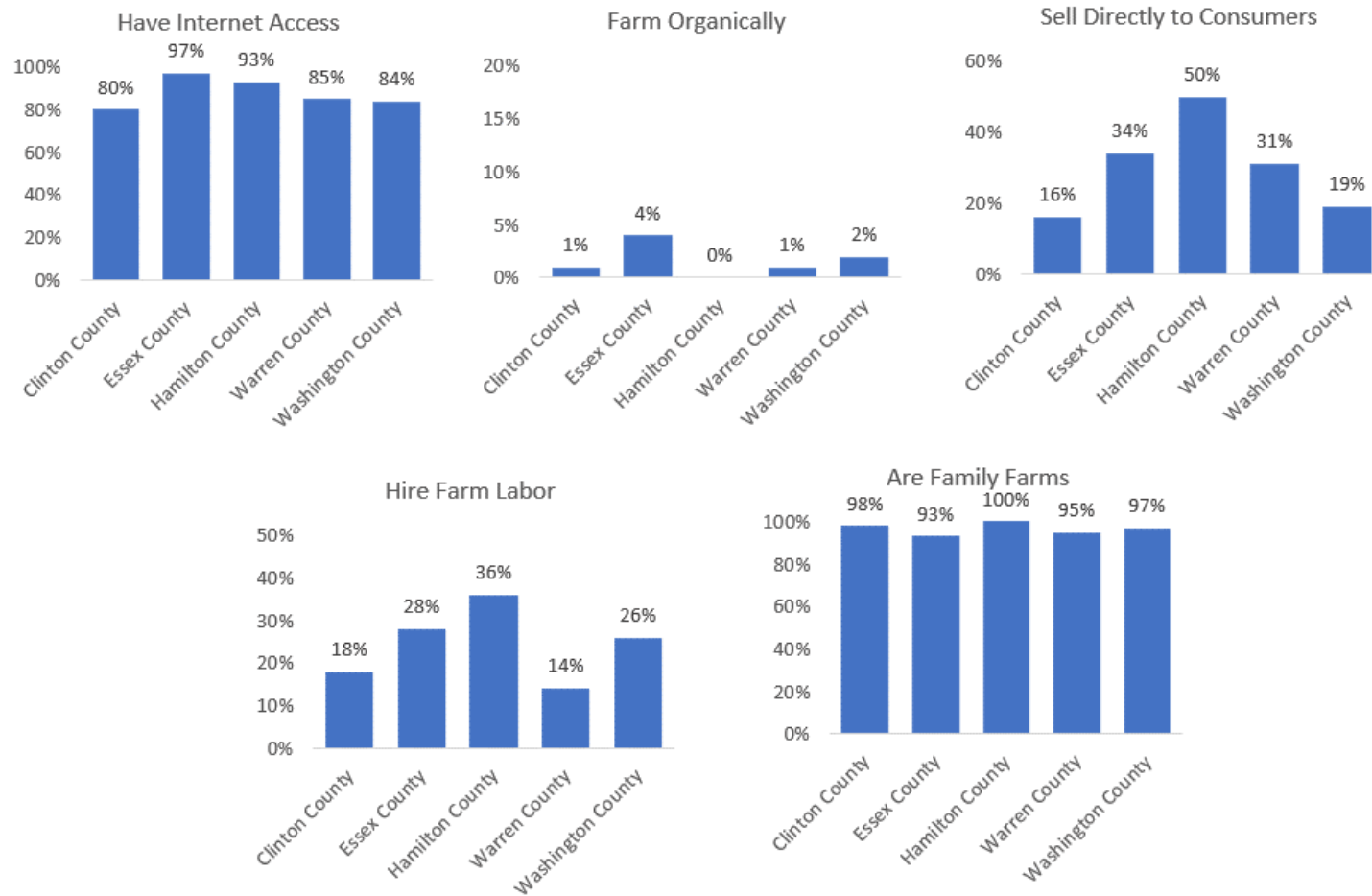
Source: USDA 2017 National Agriculture Census

*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

Clinton County

| 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 |

Warren County

| 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 |

Essex County

| 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 |

Washington County

| 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 |
| Total | | 112,525 | 113,215 | 100% | 690 | 1% | | | 5,950 |

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 |

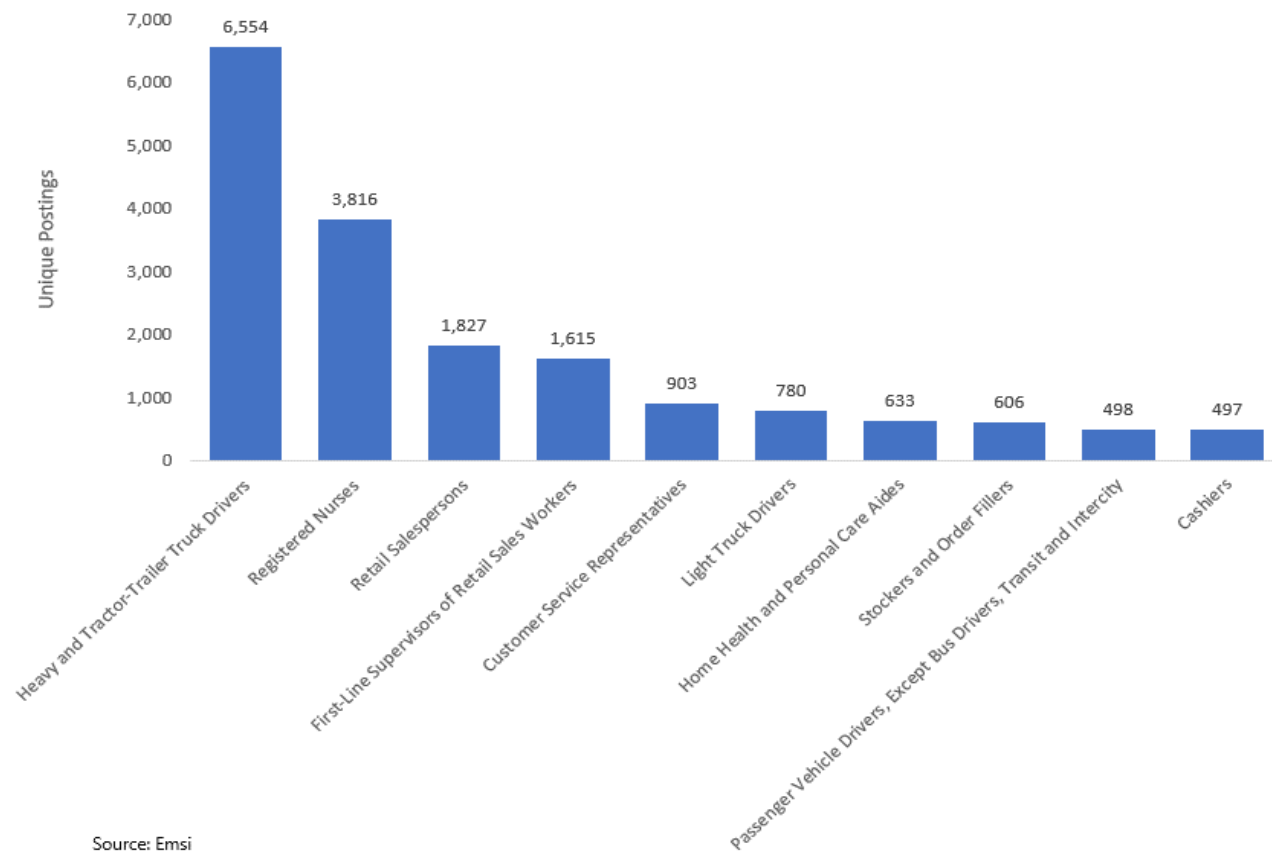
Source: Emsi

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



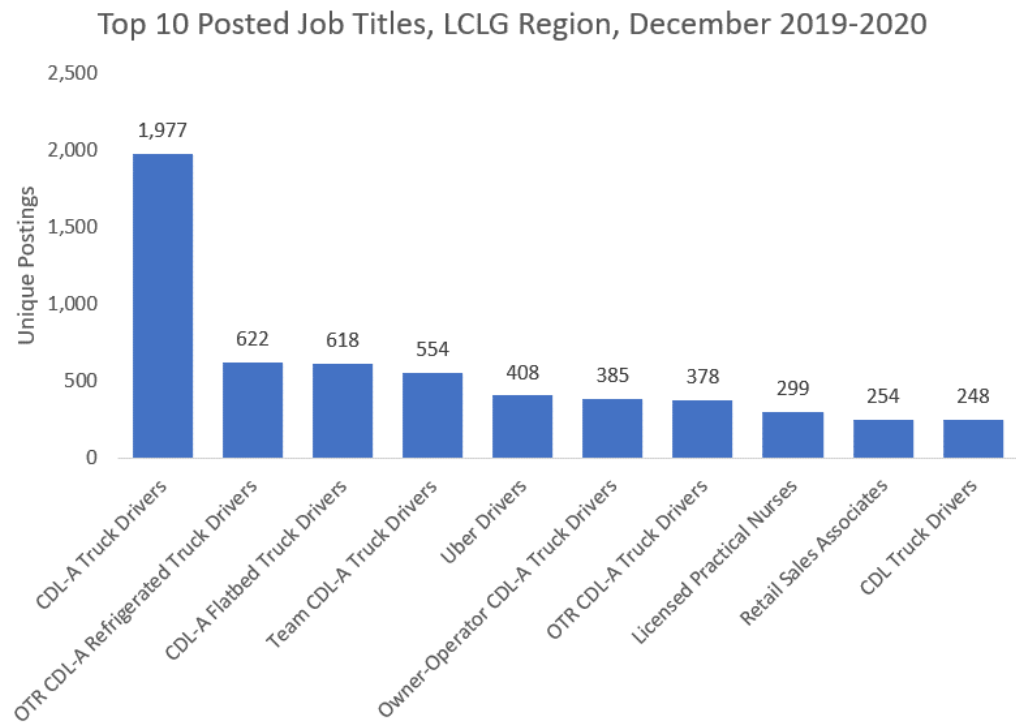
Source: Emsi

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.

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

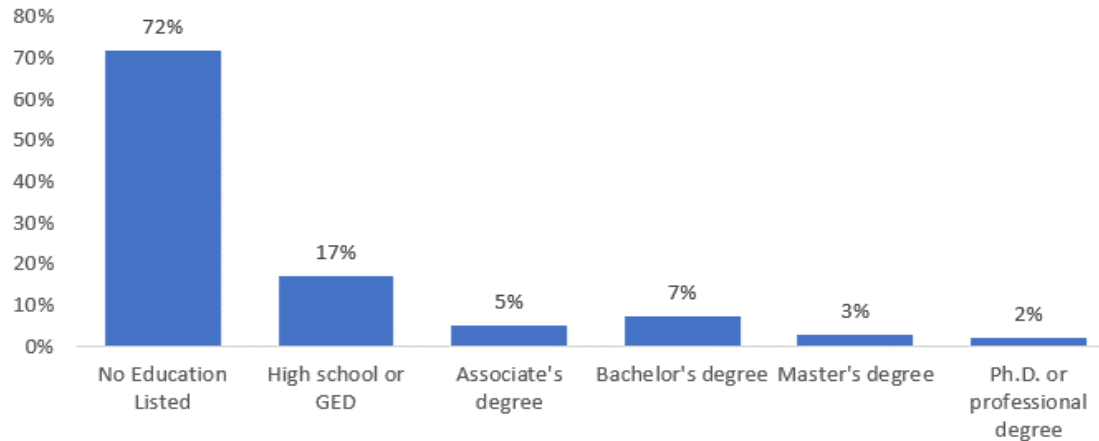


Source: Emsi

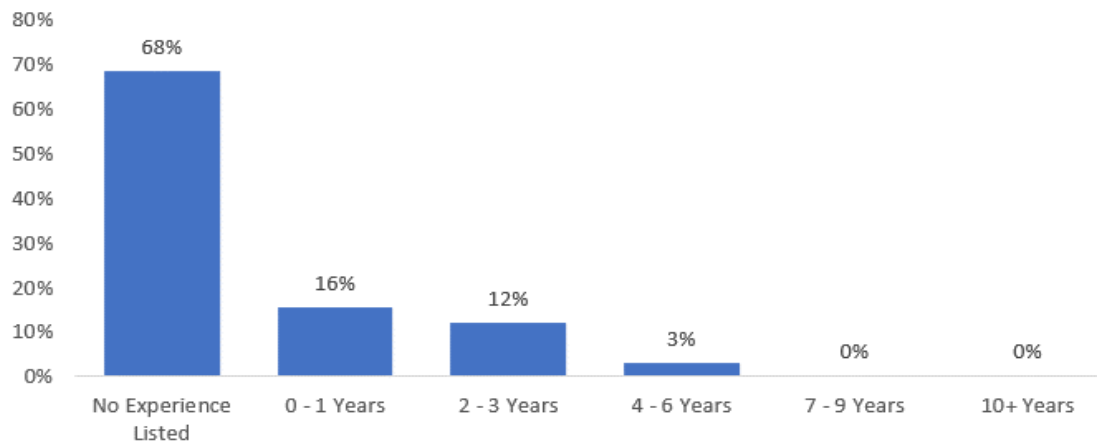
EDUCATION AND SKILL REQUIREMENTS

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 Qualification |
|--|-----------------------------------|
| 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

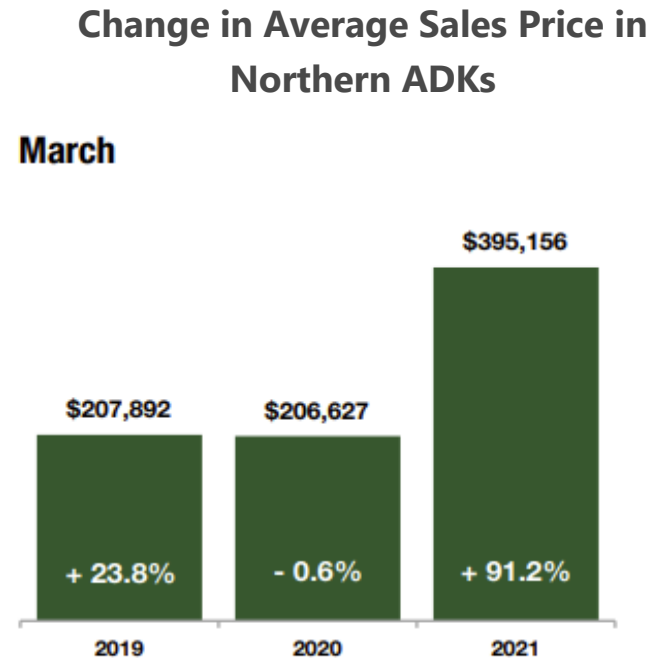
HOUSING MARKET TRENDS



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 Realtors¹ (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 Association² 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.



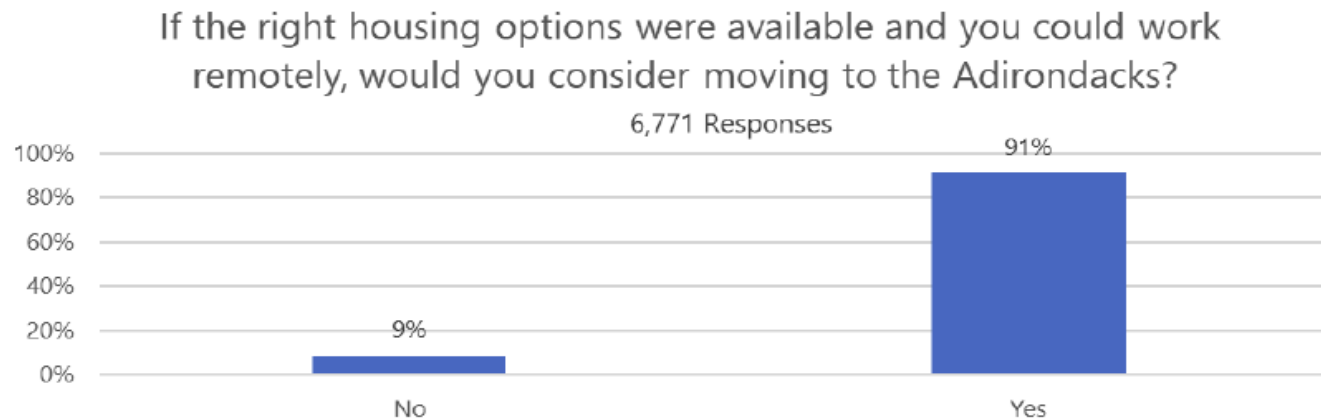
Source: Northern Adirondack Board of Realtors, March 2021 Market Report

¹ Covers Clinton, Essex, Franklin, Hamilton and Warren Counties

² 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.³

- ◆ 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*

³ *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)

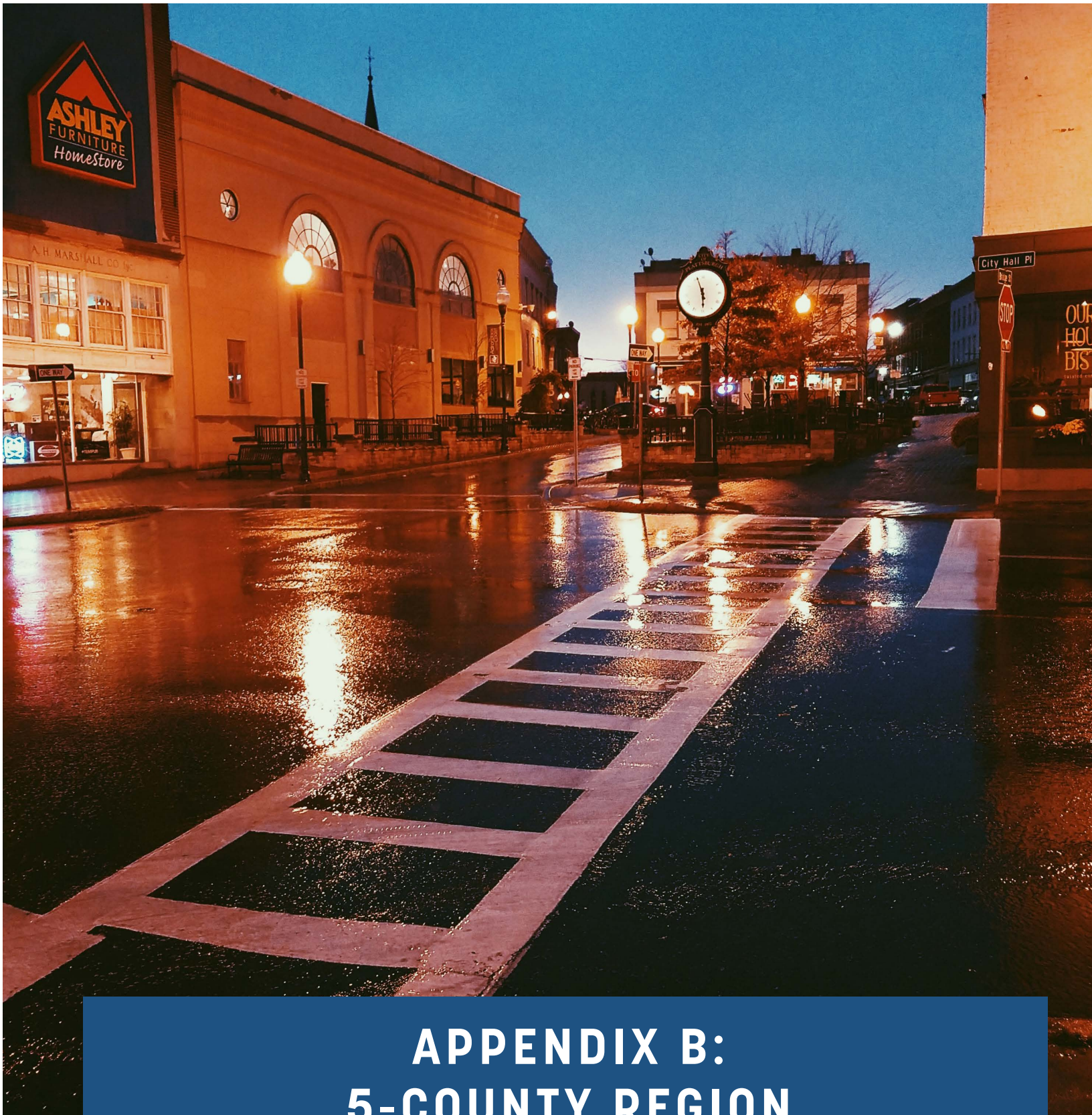
To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin 310 subscribes to Economic Modeling Specialists Intl. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. 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). 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.

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. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](#) and [LinkedIn](#).

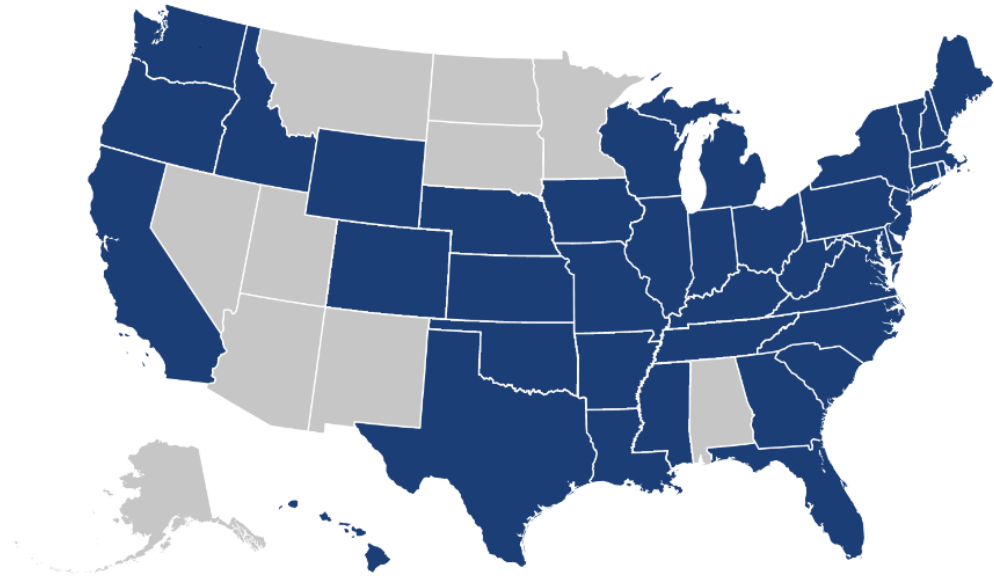
THE PROJECT TEAM

Christa O. Franzi
Principal

Alex Tranmer
Project Manager

Tom Dworetsky
Lead Analyst

Aaron Metheny
Analyst



CONTENTS

| | |
|---|----|
| Resiliency and Economic Disruption..... | 1 |
| <i>Upstream Supply Chain Trade Exposure</i> | 3 |
| <i>Key Industries by Workers Age 55 and Over</i> | 5 |
| <i>Key Industries by Diversity of Labor Force</i> | 7 |
| <i>Top Occupations in Key Industries: Automation Risk</i> | 9 |
| Attachment A: Data Sources..... | 11 |

This page intentionally left blank.

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.¹

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).

¹ 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 | |
| Total | | 43,080 | 9,825 | 4,012 | |

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.² 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 2021³, 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.⁴ 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.

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

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

⁴ <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% |
| Total | | 41,315 | 9,825 | 23.8% | 21.4% | 2.4% |

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.^{5 6}

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.⁷

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.⁸

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 Medical 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.

⁵ *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>

⁶ *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>,

⁷ 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>

⁸ 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 and Supercenters | 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, Mental Health, and Substance Abuse Services | 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 Manufacturing | 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% |
| Total | | 43,080 | 4,012 | 9% | 4% | 3% | 0% | 2% | 0% | 1% | 91% |

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 |
| Total | | | 76,815 | | |

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). 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.

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.



Leading action to grow your economy

Camoin 310
120 West Avenue, Suite 303
Saratoga Springs, NY 12866
518.899.2608
www.camoinassociates.com
[@camoinassociate](https://twitter.com/camoinassociate)





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.

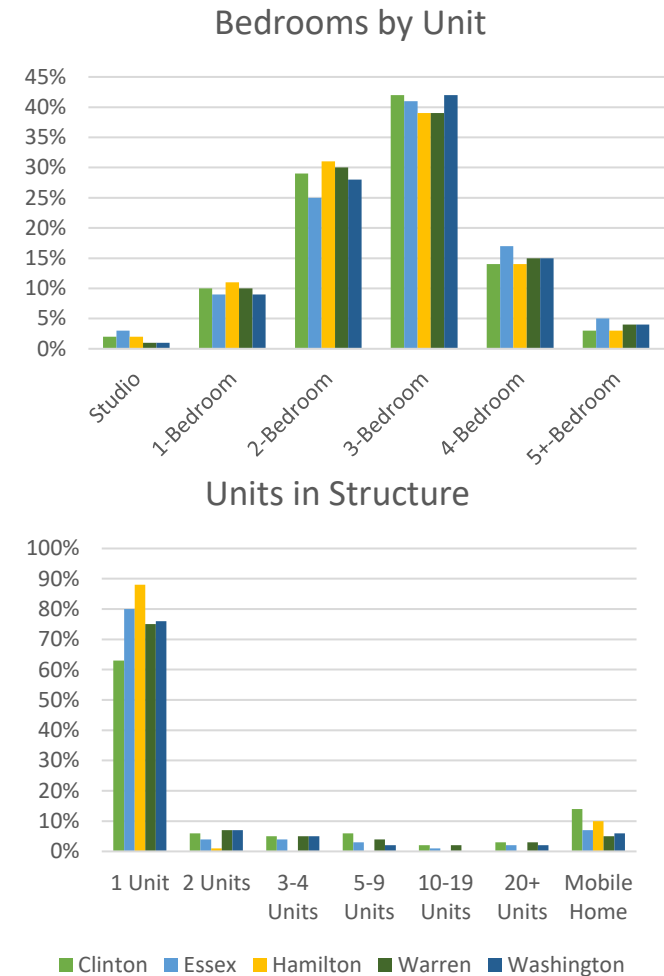
Regional Housing Diversity

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 |
|--|---------------------------------|---------------|---------------------------------|---------------|--------------|
| Median Income | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| | Very Low | Low | Moderate | Median | |
| % of County's Median Household Income | 43% | 49% | 69% | 74% | 91% |
| Monthly Income | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$ 4,492.80 |
| Affordable Monthly Household Cost (@ 30% for PITI) | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Affordable Monthly Mortgage Payment | \$443.72 | \$508.51 | \$713.44 | \$771.68 | \$943.49 |
| Affordable 30-Year Mortgage @ 4% interest | \$93,000.79 | \$106,615.77 | \$149,345.86 | \$161,704.08 | \$197,521.95 |
| Affordable Home Price | \$103,334.21 | \$118,461.97 | \$165,939.84 | \$179,671.20 | \$219,468.83 |
| Median Home Value | \$145,693.00 | | | | |
| Price-Difference from Median | (\$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 |
|---------------------------------------|------------------------------|--|--------------|---------------------------------|---------------|-------------|
| Median Income | | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| | |  | | | | |
| % of County's Median Household Income | | 43% | 49% | 69% | 74% | 91% |
| Monthly Income | | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$ 4,492.80 |
| Affordable Rent Payment (@ 30%) | | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Studio | Median Rent | \$735.00 | | | | |
| | Price Difference from Median | (\$101.12) | (\$8.56) | \$284.20 | \$367.40 | \$612.84 |
| One-Bedroom | Median Rent | \$740.00 | | | | |
| | Price Difference from Median | (\$106.12) | (\$13.56) | \$279.20 | \$362.40 | \$607.84 |
| Two-Bedroom | Median Rent | \$939.00 | | | | |
| | Price Difference from Median | (\$305.12) | (\$212.56) | \$80.20 | \$163.40 | \$408.84 |
| Three-Bedroom | Median Rent | \$1,222.00 | | | | |
| | Price Difference from Median | (\$588.12) | (\$495.56) | (\$202.80) | (\$119.60) | \$125.84 |
| Four-Bedroom | Median Rent | \$1,345.00 | | | | |
| | Price Difference from Median | (\$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 |
|--|--|---------------|---------------------------------|---------------|--------------|
| Median Income | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| |  | | | | |
| % of County's Median Household Income | 47% | 54% | 76% | 82% | 100% |
| Monthly Income | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$4,492.80 |
| Affordable Monthly Household Cost (@ 30% for PITI) | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Affordable Monthly Mortgage Payment | \$443.72 | \$508.51 | \$713.44 | \$771.68 | \$943.49 |
| Affordable 30-Year Mortgage @ 4% interest | \$93,000.79 | \$106,615.77 | \$149,345.86 | \$161,704.08 | \$197,521.95 |
| Affordable Home Price | \$103,334.21 | \$118,461.97 | \$165,939.84 | \$179,671.20 | \$219,468.83 |
| Median Home Value | \$159,129.50 | | | | |
| Price-Difference from Median | (\$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 | Retail Trade | Health Care & Social Assistance | Manufacturing | Government |
|---------------------------------------|------------------------------|---|--------------|---------------------------------|---------------|-------------|
| Median Income | | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| | | <div> <div>Very Low</div> <div>Low</div> <div>Moderate</div> <div>Median</div> </div> | | | | |
| % of County's Median Household Income | | 47% | 54% | 76% | 82% | 100% |
| Monthly Income | | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$ 4,492.80 |
| Affordable Rent Payment (@ 30%) | | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Studio | Median Rent | \$732.00 | | | | |
| | Price Difference from Median | (\$98.12) | (\$5.56) | \$287.20 | \$370.40 | \$615.84 |
| One-Bedroom | Median Rent | \$774.00 | | | | |
| | Price Difference from Median | (\$140.12) | (\$47.56) | \$245.20 | \$328.40 | \$573.84 |
| Two-Bedroom | Median Rent | \$919.00 | | | | |
| | Price Difference from Median | (\$285.12) | (\$192.56) | \$100.20 | \$183.40 | \$428.84 |
| Three-Bedroom | Median Rent | \$1,246.00 | | | | |
| | Price Difference from Median | (\$612.12) | (\$519.56) | (\$226.80) | (\$143.60) | \$101.84 |
| Four-Bedroom | Median Rent | \$1,251.00 | | | | |
| | Price Difference from Median | (\$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 |
|--|---------------------------------|---------------|----------------------------------|--------------|--------------|
| Median Income | \$25,355.20 | \$29,057.60 | \$30,617.60 | \$40,460.80 | \$53,913.60 |
| | Very Low | Low | Moderate | | Median |
| % of County's Median Household Income | 45% | 52% | 54% | 90% | 96% |
| Monthly Income | \$2,112.93 | \$2,421.47 | \$2,551.47 | \$4,205.07 | \$4,492.80 |
| Affordable Monthly Household Cost (@ 30% for PITI) | \$633.88 | \$726.44 | \$765.44 | \$1,261.52 | \$1,347.84 |
| Affordable Monthly Mortgage Payment | \$443.72 | \$508.51 | \$535.81 | \$883.06 | \$943.49 |
| Affordable 30-Year Mortgage @ 4% interest | \$93,000.79 | \$106,615.77 | \$112,271.22 | \$184,954.28 | \$197,521.95 |
| Affordable Home Price | \$103,334.21 | \$118,461.97 | \$124,745.80 | \$205,504.76 | \$219,468.83 |
| Median Home Value | \$193,784.50 | | | | |
| Price-Difference from Median | (\$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 |
|---------------------------------------|------------------------------|---|--------------|----------------------------------|--------------|-------------|
| Median Income | | \$25,355.20 | \$29,057.60 | \$30,617.60 | \$40,460.80 | \$53,913.60 |
| | | <div> <div>Very Low</div> <div>Low</div> <div>Moderate</div> <div>Median</div> </div> | | | | |
| % of County's Median Household Income | | 45% | 52% | 54% | 90% | 96% |
| Monthly Income | | \$2,112.93 | \$2,421.47 | \$2,551.47 | \$4,205.07 | \$4,492.80 |
| Affordable Rent Payment (@ 30%) | | \$633.88 | \$726.44 | \$765.44 | \$1,261.52 | \$1,347.84 |
| Studio | Median Rent | \$757.00 | | | | |
| | Price Difference from Median | (\$123.12) | (\$30.56) | \$8.44 | \$504.52 | \$590.84 |
| One-Bedroom | Median Rent | \$762.00 | | | | |
| | Price Difference from Median | (\$128.12) | (\$35.56) | \$3.44 | \$499.52 | \$585.84 |
| Two-Bedroom | Median Rent | \$1,004.00 | | | | |
| | Price Difference from Median | (\$370.12) | (\$277.56) | (\$238.56) | \$257.52 | \$343.84 |
| Three-Bedroom | Median Rent | \$1,249.00 | | | | |
| | Price Difference from Median | (\$615.12) | (\$522.56) | (\$483.56) | \$12.52 | \$98.84 |
| Four-Bedroom | Median Rent | \$1,434.00 | | | | |
| | Price Difference from Median | (\$800.12) | (\$707.56) | (\$668.56) | (\$172.48) | (\$86.16) |

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 |
|--|---|----------------|---------------------------------|---------------|--------------|
| Median Income | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| | <div> <div>Very Low</div> <div>Low</div> <div>Moderate</div> <div>Median</div> </div> | | | | |
| % of County's Median Household Income | 44% | 50% | 70% | 76% | 93% |
| Monthly Income | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$ 4,492.80 |
| Affordable Monthly Household Cost (@ 30% for PITI) | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Affordable Monthly Mortgage Payment | \$443.72 | \$508.51 | \$713.44 | \$771.68 | \$943.49 |
| Affordable 30-Year Mortgage @ 4% interest | \$93,000.79 | \$106,615.77 | \$149,345.86 | \$161,704.08 | \$197,521.95 |
| Affordable Home Price | \$103,334.21 | \$118,461.97 | \$165,939.84 | \$179,671.20 | \$219,468.83 |
| Median Home Value | \$220,332.00 | | | | |
| Price-Difference from Median | (\$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 |
|---------------------------------------|------------------------------|---------------------------------|--------------|---------------------------------|---------------|-------------|
| Median Income | | \$25,355.20 | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$53,913.60 |
| Very Low | | Low | | Moderate | | Median |
| % of County's Median Household Income | | 44% | 50% | 70% | 76% | 93% |
| Monthly Income | | \$2,112.93 | \$2,421.47 | \$3,397.33 | \$3,674.67 | \$ 4,492.80 |
| Affordable Rent Payment (@ 30%) | | \$633.88 | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,347.84 |
| Studio | Median Rent | \$715.00 | | | | |
| | Price Difference from Median | (\$81.12) | \$11.44 | \$304.20 | \$387.40 | \$632.84 |
| One-Bedroom | Median Rent | \$839.00 | | | | |
| | Price Difference from Median | (\$205.12) | (\$112.56) | \$180.20 | \$263.40 | \$508.84 |
| Two-Bedroom | Median Rent | \$1,062.00 | | | | |
| | Price Difference from Median | (\$428.12) | (\$335.56) | (\$42.80) | \$40.40 | \$285.84 |
| Three-Bedroom | Median Rent | \$1,386.00 | | | | |
| | Price Difference from Median | (\$752.12) | (\$659.56) | (\$366.80) | (\$283.60) | (\$38.16) |
| Four-Bedroom | Median Rent | \$1,458.00 | | | | |
| | Price Difference from Median | (\$824.12) | (\$731.56) | (\$438.80) | (\$355.60) | (\$110.16) |

FORWARD *together*

Housing Gap Analysis

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 |
|--|---------------|---------------------------------|---------------|--------------|--------------|
| 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 Monthly Household Cost (@ 30% for PITI) | \$726.44 | \$1,019.20 | \$1,102.40 | \$1,261.52 | \$1,347.84 |
| Affordable Monthly Mortgage Payment | \$508.51 | \$713.44 | \$771.68 | \$883.06 | \$943.49 |
| Affordable 30-Year Mortgage @ 4% interest | \$106,615.77 | \$149,345.86 | \$161,704.08 | \$184,954.28 | \$197,521.95 |
| Affordable Home Price | \$118,461.97 | \$165,939.84 | \$179,671.20 | \$205,504.76 | \$219,468.83 |
| Median Home Value | \$160,987.50 | | | | |
| Price-Difference from Median | (\$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.

| Health Care & Social Assistance | | | | | | |
|---------------------------------------|------------------------------|--|-------------|---------------|--------------|-------------|
| Employment Sector | | Retail Trade | Assistance | Manufacturing | Construction | Government |
| Median Income | | \$29,057.60 | \$40,768.00 | \$44,096.00 | \$50,460.80 | \$53,913.60 |
| | | <div><div>Very Low</div><div>Low</div><div>Moderate</div><div>Median</div></div> | | | | |
| % 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 LCLGRPB 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 LCLGRPB 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

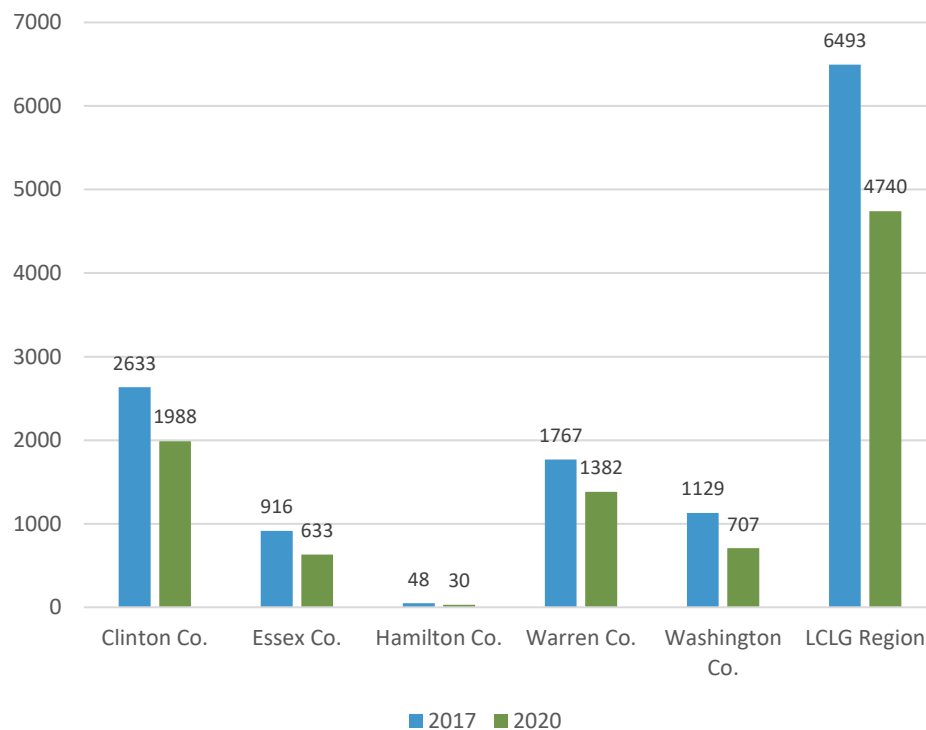
The Southern Adirondack Child Care Network's (SACCN's) 2019 *Child Care Community Needs Assessment* found that the supply of child care in Warren, Washington, and Hamilton Counties declined by 30% over the 2012-2019 period, a trend occurring throughout New York and nationally. With the pandemic forcing 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.

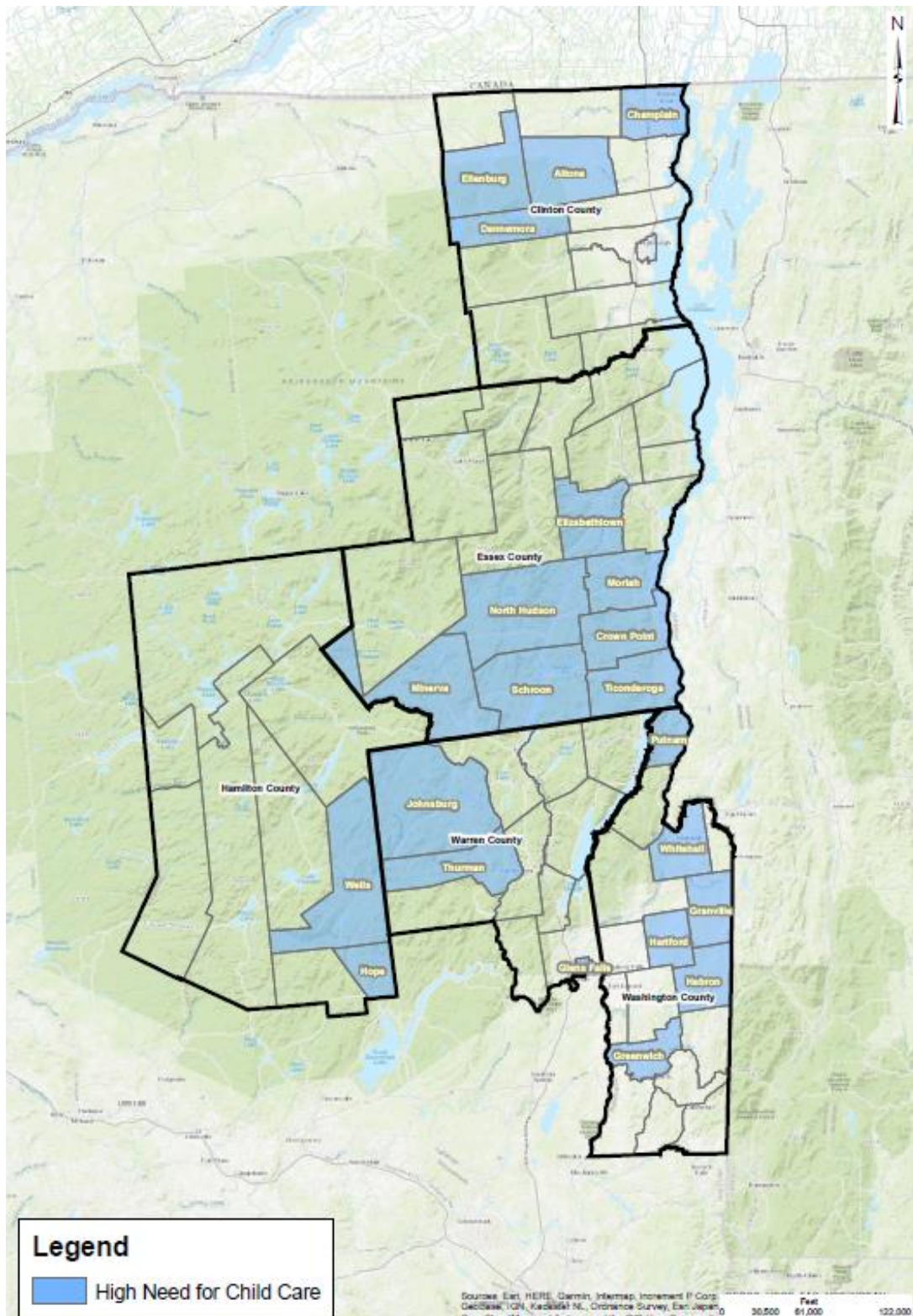
Challenges Facing Providers

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

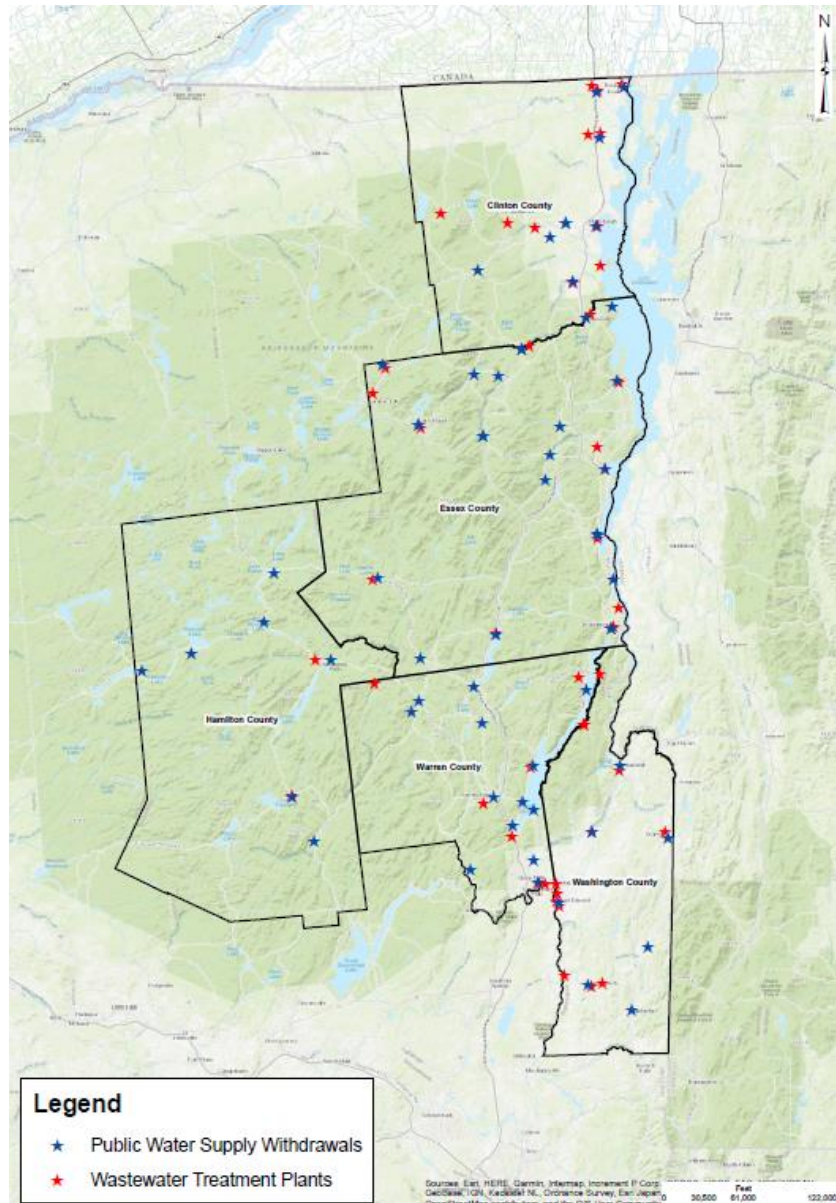
Water & Sewer Infrastructure

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.

FORWARD *together*

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 |
| LCLG Region | 57 | \$ 242,027,679 | 101 | \$ 189,260,768 |

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 | \$73,632,418 |
| Advanced Wastewater Treatment | \$11,556,323 | -- | -- | -- | -- | \$11,556,323 |
| Infiltration/ Inflow (I/I) Correction | -- | \$2,244,133 | -- | \$1,605,073 | \$13,033,305 | \$16,882,511 |
| Replacement/ Rehabilitation of Sewers | \$10,122,499 | \$3,912,846 | -- | \$47,757,935 | \$634,879 | \$62,428,159 |
| New Collector Sewers | \$19,388,447 | \$13,361,855 | \$5,644,511 | \$13,064,288 | \$27,995,920 | \$79,455,021 |
| New Interceptor Sewers | \$1,569,023 | -- | -- | \$974,862 | \$4,545,186 | \$7,089,071 |
| Totals | \$54,891,253 | \$57,280,951 | \$6,232,743 | \$106,848,954 | \$79,010,789 | \$251,043,503 |

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.

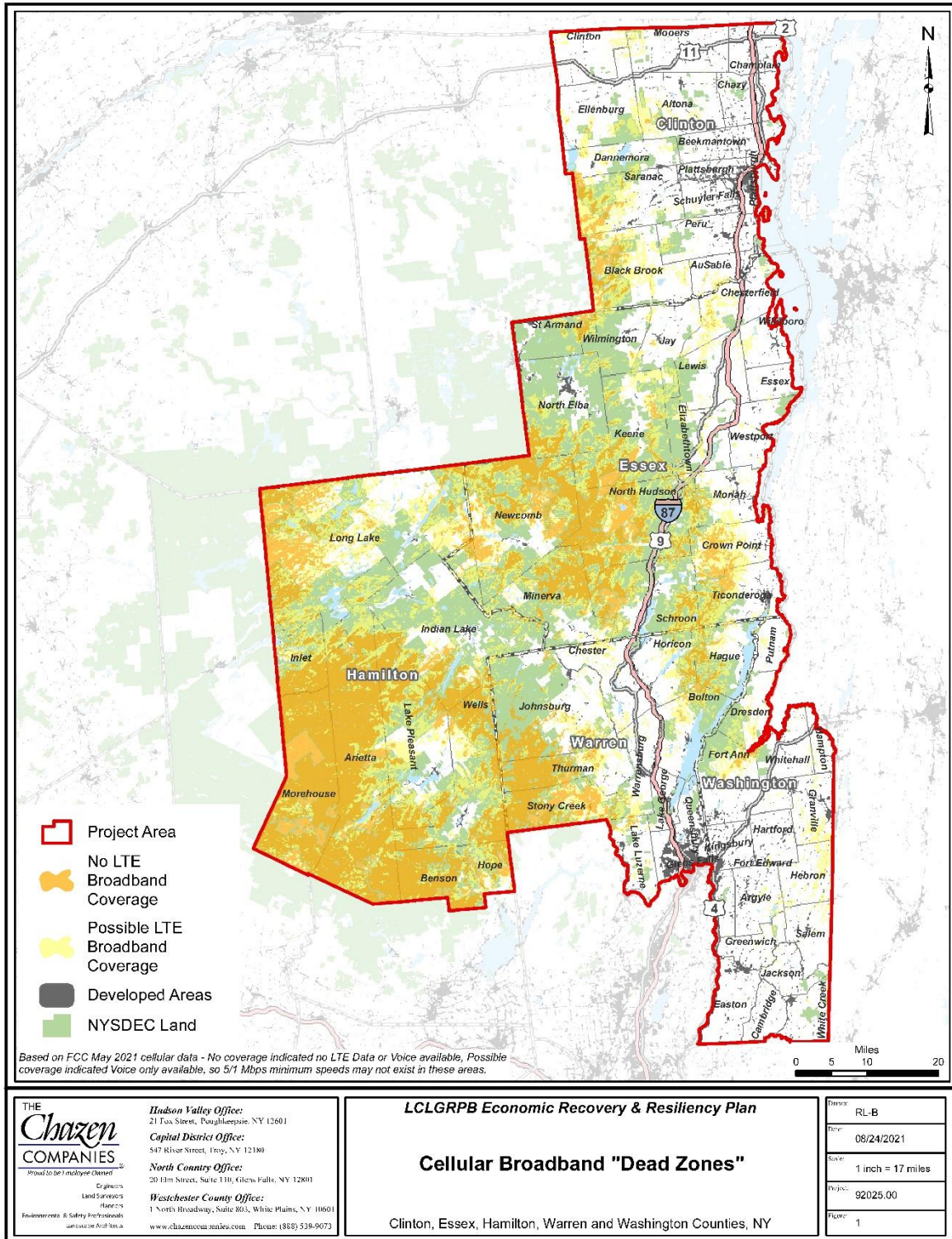
The pandemic has brought new challenges, and what was once thought of as a convenience has been transformed into an absolute necessity. Small business, parents/teachers, and the healthcare community have shifted to telework, remote schooling, and telemedicine. The consumer economy has shifted from bricks 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



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 | | Hypochlorite-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 Tank/ Doten Tank | Not Specified | | |
| | V. of Granville | 1937 | 1976 | Imhoff Tank/ 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).

An aerial photograph of a town nestled in a valley, surrounded by dense green forests. In the background, a range of blue mountains is visible under a sky filled with large, white and grey clouds. The town features a mix of brick and stone buildings, including a prominent church with a tall steeple. A dark blue banner is overlaid at the bottom of the image.

APPENDIX E: IMPLEMENTATION MATRIX

Appendix E: Implementation Matrix

| Strategy | Partners | Timeline (Short-term/ST, Long-term/LT, Ongoing) | Cost | Metrics to Measure Success |
|---|---|--|------|--|
| Connecting Our People | | | | |
| Develop a regional drinking water & wastewater needs assessment and strategy | <ul style="list-style-type: none">Local municipalitiesState agencies (NYSDEC, EFC, DOH) | 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">Local municipalitiesAPAState agencies (NYSESD)County officials & ED groupsPrivate sector companiesADK Action | 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">Local municipalitiesAPAState agencies (NYSESD)County officials & ED groupsPrivate sector companies | 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">Regional EmployersTransit agencies | ST | \$ | # of workers who commute by alternate means of transportation, additional miles of transit service |
| Child Care Access | | | | |
| Recruit, train, and open more home-based child care | <ul style="list-style-type: none">CCRRsChambers of CommerceCommunity CollegesCareer CentersPrivate sector employeesEarly Care and Learning Council | ST, Ongoing | \$\$ | # of home-based child care providers |
| Establish a staffed family child care network | <ul style="list-style-type: none">CCRRsEarly Care and learning council | 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">CCRRsANCABirth to 3 AllianceEarly Care & Learning Council | Ongoing | \$ | # of child care providers in the region, increase in child care providers' revenue |
| Housing Access & Stability | | | | |
| Establish a regional coordination group and champion for housing | <ul style="list-style-type: none">Adirondack Community Housing TrustNYS Homes and Community RenewalNCREDC & CREDC | ST, Ongoing | \$ | # of initiatives that are advanced through regional coordinating group |
| Develop a regional housing assessment and strategy | <ul style="list-style-type: none">Adirondack Community Housing TrustAffordable Housing Accreditation BoardNational Association of housing and redevelopment officialsState agencies (HCR)APANCREDC & CREDC | ST | \$ | funding secured for implementation activities, # of projects in the pipeline |
| Create a LCLG Regional Land Bank | <ul style="list-style-type: none">New York Land Bank AssociationNew York State Empire State Development | 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">Center for Community Progress | | | |
| Develop a year-round modular housing factory and deploy modular housing units throughout the region | <ul style="list-style-type: none">Point Positive, Inc.Workforce Development BoardsCommunity Colleges | LT | \$\$\$ | Increase in # of housing units in the region |
| Create and Deploy a Regional Housing Portal | <ul style="list-style-type: none">Housing authoritiesReal estate agencies | LT | \$\$ | # of housing units searchable online, # of portal users/visits |
| Connect Main Streets & Community Hubs | | | | |
| Connect Main Streets and community hubs | <ul style="list-style-type: none">BID & ChambersMain Street Businesses of all sizesProperty Owners/Developers | 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">ROOSTConvention & Visitor BureausMunicipalitiesAPAPrivate sector businesses | 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">IDAs/EDCsLocal realtors/realtor associationsMain Street building and property ownersLocal and Regional Chambers of CommerceMunicipalities | 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">IDAs/EDCsState agencies (NYSESD, NYSOCR, NYSDOS)Local realtors/realtor associationsLocal and Regional Chambers of CommerceMunicipalitiesUS EPA | LT | \$\$ | # of site assessments, # of projects initiated following assessment |
| Pursue BOA designation in relevant geographies | <ul style="list-style-type: none">NYSDOSMunicipalitiesUS EPA | Ongoing | \$ | # of active BOA projects being pursued |
| Downtown & Hamlet center streetscape revitalization | <ul style="list-style-type: none">NYSDOSMunicipalities,Related MPOs, nonprofits (e.g., Smart Growth America)ADA advocates, etc. | ongoing | \$\$ | \$\$ of funding allocated for streetscapes |
| Entrepreneurial Ecosystem Building | | | | |
| Reimagine Supply Chain Resilience through Entrepreneurship | <ul style="list-style-type: none">Regional EDOsPrivate sector businessesEntrepreneurs | 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">Regional EDOsRegional Coffee Shops/CafesCoworking Spaces & Libraries in the regionLocal entrepreneursKauffman Foundation | 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">Local EDOs | Ongoing | \$\$ | # of participants in cohorts, # of training programs delivered |

Appendix E: Implementation Matrix

| | | | | |
|--|--|-------------|--------|--|
| | <ul style="list-style-type: none"> Regional service providers | | | |
| Hold a startup pitch competition | <ul style="list-style-type: none"> Regional colleges and universities Local EDOs Entrepenuership Network Coordinator (future position) | 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"> US Small Business Administration Veterans Business Outreach Centers Upstate New York Black Chamber of Commerce | ST | \$ | # of calls with MWBE or veteran businesses, \$\$ of loans to MWBE or veteran businesses |
| Career Building & Training | | | | |
| Replicate “Career Jam” program across the region | <ul style="list-style-type: none"> Workforce development boards Educational Institutions Private sector employers | 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"> Workforce development boards BOCES Educational Institutions | LT | \$ | # of students participating in program |
| Tailor BRE survey questions for real-time labor market information | <ul style="list-style-type: none"> Workforce development boards Post-secondary educational institutions | 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"> Workforce development boards Post-secondary educational institutions | Ongoing | \$\$ | # of workers placed in high tech fields, \$\$ allocated to upskill training |
| Additional Actions | | | | |
| Conduct a regional economic diversification assessment | <ul style="list-style-type: none"> NYSED NCREDC & CREDC Chambers of Commerce | ST | \$ | Increase in region’s economic diversity, increase in year-round employment |
| Re-Envision the Forest Industry | <ul style="list-style-type: none"> Warren County EDC 501CTHREE NYSED Post-secondary educational institutions Private sector companies | LT | \$\$\$ | Paper and pulp industry GRP |
| Increase coordination and collaboration within the medical device & life science sector | <ul style="list-style-type: none"> Chambers of Commerce | ST, Ongoing | \$ | Medical device and life science industry's GRP |
| Support and replicate existing mobile healthcare providers | <ul style="list-style-type: none"> Health care providers | 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"> Health care providers | LT | \$\$ | # of doctors and medical professionals in the region |
| Establish a regional agricultural hub | <ul style="list-style-type: none"> Cornell Cooperative Extension Land conservation organizations Agriculture businesses Food Pantries Local colleges & universities Hudson Valley Agribusiness Development Corporation | ST | \$\$ | # of Hubs established, Agricultural sector GRP |
| Explore mobile meat processing facilities | <ul style="list-style-type: none"> Niche meat processor assistance network Cornell Cooperative Extension | 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"> North Country Chamber of Commerce NCREDC and CREDC IDAs EDCs | 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">Quebec-New York Corridor Coalition | | | |
| Showcase the Region as a Leader in Climate Protection | <ul style="list-style-type: none">ROOSTEDCsCounty & Local Tourism Departments | Ongoing | \$ | # of designated climate smart communities, # of articles featuring regional environmental initiatives |
| Continue LCLGRPB's role as the region's coordinating economic development organization | <ul style="list-style-type: none">MunicipalitiesEconomic development partnersREDCsState agencies | Ongoing | \$ | # of visits to LCLGRPB's website, # of plan recommendations implemented, # of projects awarded grant funding, \$\$ grant funding and loans distributed in the region |