

CHENANGO COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE 2014-2020

A Strategic Work Plan for Chenango County Economic Development partner organizations to address key economic opportunities and challenges, improve housing supply, enhance the agricultural sector, and grow tourism.



CHENANGO COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE©

2014 Commerce Chenango & Development Chenango
15 South Broad Street | Norwich, NY 13815
with excerpts from the
2006 Economic Development Strategic Plan

which was coordinated & written by:

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PREFACE

The work for this plan began in 2012, with participation from residents, businesses, municipal leaders, and partner organizations. A fresh perspective was sought on the issues, challenges, and opportunities surrounding economic development in Chenango County today. This plan sought to outline a new vision, set new priorities, and direct the work of the County economic development partners over the next several years. The resulting goals and strategies address our challenges and provide opportunity for business and project development which leads to long term growth and sustainability.

Acknowledgments

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TABLE OF CONTENTS

PART 1: **Executive Summary**

PART 2: **Introduction & Overview**

PART 3: **Planning Process & Content Overview**

PART 4: **Demographic Profile**

PART 5: **Community Resources**

PART 6: **Industry Analysis & Economic Profile**

PART 7: **Goals, Strategies, & Action Items**

PART 8: **Implementation Plan & Action Matrix**

APPENDICES

APPENDIX A: Strategic Plan Powerpoint

APPENDIX B: Business Survey Summary

APPENDIX C: Municipal Survey Summary

APPENDIX D: SWOT Workshop Summary

APPENDIX E: Previous Planning Efforts

APPENDIX F: Economic Development Agencies & Tools

APPENDIX G: Ag Summit V Results

APPENDIX H: Historic Properties & Resources

APPENDIX I: Arts and Economic Prosperity Summary

PART 1: EXECUTIVE SUMMARY

An Economic Development Strategic Plan identifies the goals and strategies by which a community seeks to achieve sustainable economic viability in a competitive regional, national and global markets, and to achieve economic growth to meet the future needs of both its residents and businesses. This Economic Development Strategic Plan Update will act as a guide or “blueprint” for these activities in Chenango County.

The planning and development of this Strategic Plan Update began in 2011, when the Development Chenango Corporation board of directors discussed new issues and impediments to economic development, and recommended that staff members update the plan.

The 2005-2006 economic development strategic planning process was extensive, and provided a useful and comprehensive analysis of economic conditions at that time. Many of the Goals/Strategies and Action Items proposed in the 2006 plan have been accomplished or are part of the ongoing work of key organizations impacting economic development in Chenango County.

Staff and board members sought to update the plan without starting from scratch, and therefore the following process was proposed and pursued:

- benchmarking status of the previous plans’ proposed action items
- seeking feedback from the public, businesses, municipalities, and community partners regarding the prior plan and accomplishments
- updating demographic information, and sharing the information so that stakeholders could consider it while participating
- surveying the current economic conditions of the area
- conducting a new SWOT analysis
- identifying and seeking feedback regarding the priority goals to pursue in the next five to ten years
- utilizing an advisory committee throughout the process for guidance, feedback, and direction

The process resulted in the following significant updates:

Vision

Chenango County’s economic development partners will develop a prosperous and business friendly economic climate which yields long term job growth, capital investment and improved quality of life. The partners will provide services and support for: business development, retention, and expansion; infrastructure and housing development; education and workforce; and the growth of tourism, cultural, and arts activities.

Goals

The six main economic development goals for Chenango County to achieve over the next five years are as follows:

- Encourage Business Recruitment, Retention, and Expansion
- Prioritize and Address Workforce Development Needs
- Foster Downtown Revitalization
- Support Housing Development to Meet Community Needs
- Build Tourism, Agritourism, the Arts, & Cultural Opportunities
- Grow Agriculture and Forestry Industries

Strategies & Action Items

Strategies to achieve the six goals, as well as action items to support those key strategies, were identified utilizing known economic development tools, an understanding of the capacity of Chenango County municipal entities and partner economic development agencies, and feedback received from the numerous participants in the planning process.

The Goals, Strategies, and Action items section—the true work plan for the partner organizations—is located on page 55.

PART 2: INTRODUCTION & PLAN OVERVIEW

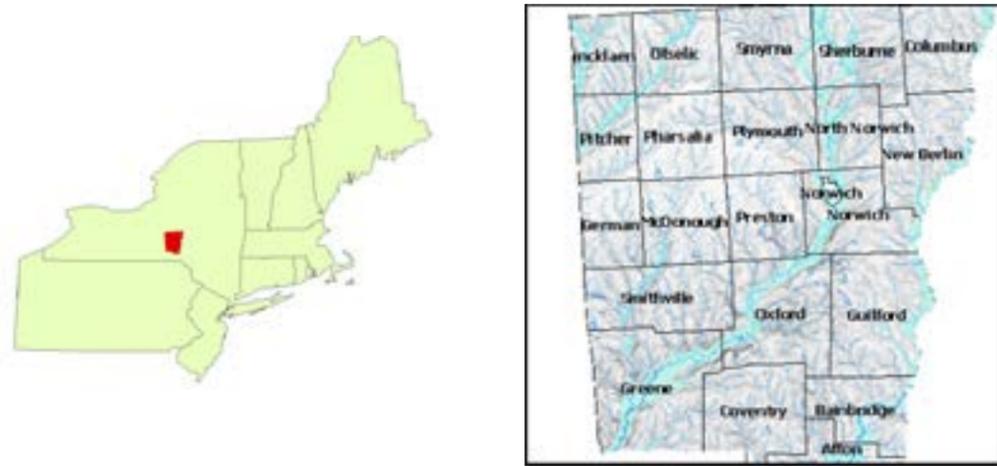


Figure 1. shows Chenango County's location in the Northeastern United States.
Figure 2. details the towns within Chenango County.

Introduction

Chenango County is located in New York State's Southern Tier Region. This district has historically consisted of Otsego, Delaware, Chenango, Broome, Tioga, Tompkins, Chemung, Schuyler, and Steuben Counties. New York State launched a new economic development program and funding application process in 2011, and divided the state into ten regions. The Southern Tier now includes all counties listed above with exception Otsego County, Chenango's neighbor to the east.

Chenango County is approximately 899 square miles, with a population of 50,477 according to the 2010 U.S. Decennial Census. The population for 2013 was estimated to have declined by nearly an additional 1,000 residents, to 49,503, by the US Census department.

The County is predominantly rural and is comprised of 21 towns, 8 villages, and one city. The County Seat in Chenango County is the City of Norwich, with 7,190 residents as of the 2010 Census.

Location

Chenango County is located in New York State's Southern Tier District. This district consists of Otsego, Delaware, Chenango, Broome, Tioga, Tompkins, Chemung, Schuyler, and Steuben Counties. New York State acted to create new economic development regions in 2011, and the Southern Tier was designated as including the counties above, minus Otsego County.

Chenango County is also a part of what is known as the "Central NY Region", as defined by the New York State Department of Economic Development for Tourism Promotion purposes. Included in this designation are Broome, Chenango, Herkimer, Madison, Montgomery, Oneida, Otsego, and Schoharie Counties.

Geographically adjacent New York counties include Madison to the north, Otsego to the northeast, Delaware to the southeast, Broome to the south and southwest, and Cortland to the west and northwest. For comparative purposes, the data for the Counties adjacent to Chenango County will be evaluated. This broader base of reference will be known herein as the "six county region".

Population Density

Chenango County is approximately 899 square miles. Chenango County's population was 50,477 in 2010, according to the U.S. Census Bureau 2010 Census. The County is predominately rural and comprised of 21 towns, 8 villages, and one city. The county has a very low population density of one resident for every 10 acres of land. In fact, areas outside of the County's urbanized areas, such as the city of Norwich, have as little as .2 residents per 10 acres of land (e.g. Town of German, Town of Pharsalia). Based on the 2010 Census data, the largest community in the County, and the County Seat, is the City of Norwich, with 7,190 residents. The largest towns in the County are Greene, with 5,604 residents; Oxford with 3,901; and Sherburne, with 4,048. The largest village in the County is the Village of Greene (1,580 people in 2010), located in the Town of Greene.

Most recent estimates from the U.S. Census Bureau show Chenango County's population decreasing to 50,213 as of July 1, 2011, and to 49,933 as of July 1, 2012. The County ranked 48th and 49th, respectively, amongst New York State Counties for population change in 2011 and 2012. It is worth noting that most other New York State counties also lost population during the same period, with only 17 of 62 counties estimated to have population increases during the same period. As of 2013, the population was estimated to have declined to 49,503.

The declining population of Chenango County (as with much of Upstate New York) has been identified as a major weakness and long-term economic development challenge for the county and its leaders to consider. With the existing population characterized as "aging", the continuous gradual decline will contribute to economic development problems such as a reduction in overall workforce and the quality of that workforce; the lack of new entrants into Chenango County's school systems; and the lack of young families entering the local real estate market place to purchase and revitalize housing. Overall, population decline—coupled with the existing population aging and more families living on a fixed income—will reduce the consumer base and impact the ability of businesses in the area to grow and prosper.

Chenango County's economic and community development partners, municipal leaders, and residents should be concerned with the population loss, and consider creative ways to combat that loss over the long term. Planning officials should consider creative ways to increase the perception of "quality of life", spur new developments and attract new residents to the area.

Demographic Profile

Chenango County Demographic information was updated utilizing data from the 2010 United States Census and the 2007 & 2012 United States Agricultural Census, and is included in detail in the Demographic Profile portion of this plan. In some cases, the American Community Survey and Census.gov estimates have been referenced. Additional information regarding unemployment and the workforce was sought from the New York State Department of Labor and Cornell University. Planners compiled updated data for population, age distribution, housing, education, household income, employment, and industry distribution throughout Chenango County.

The most noticeable trends include the continued declining and aging population, and the decrease in available housing units. While Chenango County experienced an increase in total housing units from 2000 to 2010, the total number of available housing units for rent decreased by nearly half. The number available for sale also decreased, and meanwhile, the number of vacation/seasonal homes in the county increased by nearly 33% in ten years.

Attached as Appendix A is the Powerpoint presentation that was shared with community stakeholders throughout the SWOT process, and which summarized the major demographic findings. A more in-depth Demographic Profile for Chenango County is included in this plan, beginning on page 16.

Community Resources Inventory

Following the demographic analysis, the next step in the planning process examined the existing conditions, trends, and resources that contribute to the Chenango County economic base. The topics examined in the community resources inventory included transportation, employment centers, educational and workforce development resources, tourism resources and outdoor activities, energy resources, water, sewer, and public waste infrastructure, and a sampling of commercial real estate currently available. The intent behind this section is to identify and explore community assets that most pertain to economic and community development in Chenango County.

Industry Analysis & Economic Profile

The Chenango County Economic Development Strategic Plan (2006) included the development of a detailed analysis of prevailing area industries. The economic industry analysis includes a historical overview of all employment sectors, and a discussion of trends and the effects of economic declines in the County.

Two major economic analysis techniques, location quotient and shift-share analysis, were used to shed light on the historical development of specific industries in Chenango County. The location quotient determines whether one area's contribution to a certain sector or industry is greater or less than some larger reference economy. Shift-share analysis measures the given area's local economic base and the competitiveness of its industrial sectors. While determining the prevailing industries in Chenango County, regional economies were used to identify commonalities of industries. This will allow readers of the plan to understand regional markets and their effect on Chenango County.

These economic analyses, as well as public participation, and the community resources inventory, identified three fundamental industry sectors. Current trends depicting potential decreases in these sectors' local competitive share indicates a need to further examine these industries to identify how they can be strengthened. Following this section is the Economic Profile, which closely examines the past, present, and potential future conditions of Agriculture, Manufacturing, and Services (Tourism and Health Care) industries.

The economic profile examines Agriculture, Manufacturing, and Services industries. The profile describes the historical significance of these industries, their current economic impact on Chenango County, and their potential future trends. This section includes two maps: **an Employment Centers Map and a Tourism Map. The Employment Centers Map identifies the location of organizations with employment over 250, significant employment centers in Chenango County, and organizations that educate and train workers. The Tourism Map identifies the location of tourist activities, including historic districts, agritourism resources, museums, and recreational activities.**

The 2014 Economic Development Strategic Plan Update includes relevant changes to the industry analysis, such as major plant closures or downsizings, or substantial expansions occurring within the County during the last eight years. For instance, though Services were identified as a major industry sector, the focus was on Tourism and Health Care/Social Services. Some of the largest employers in Chenango County and immediately nearby are service-oriented businesses, such as NBT Bank, Preferred Mutual Insurance Company, New York Central Mutual Insurance Company, and Frontier Communications. This section has been expanded to include a more comprehensive analysis of the present industry sectors.

Retail Market Analysis

The 2006 Economic Development Strategic Plan contains a detailed analysis of the Retail Market. Major shifts in

the Retail Markets throughout Chenango County have not been identified as part of the Strategic Plan Update process, and it was determined that the Retail Market Analysis presented in the 2006 Economic Development Strategic Plan was predominantly accurate and relevant. Additionally, the City of Norwich has indicated its intention to commission an updated Retail Market Analysis for the City, and may work in partnership with the County or other municipalities to include a larger Market Service Area.

Economic Development Tools

This section identifies the potential funding sources and support mechanisms available to businesses in Chenango County from federal, state, local, and private organizations. This part of the Plan identifies additional funding resources that will assist with achieving the goals, strategies, action items identified within this Economic Development Strategic Plan Update.

Future Vision and Goals

Once the stakeholder engagement and feedback portion of the plan was complete, as well as an analysis of how industry and economic activity had changed in the last eight years, the future vision and goals were drafted and included in the plan.

The six goals for the updated plan were drafted by staff utilizing the feedback and priorities identified throughout the planning process. The new goals incorporate and further develop some of the goals from the 2006 plan, and seek to address unique challenges voiced throughout the planning process as key issues that need to be the focus of economic development efforts. The six main economic development goals for Chenango County to achieve over the next five years are as follows:

- Encourage Business Recruitment, Retention, and Expansion
- Prioritize and Address Workforce Development Needs
- Foster Downtown Revitalization
- Support Housing Development to Meet Community Needs
- Build Tourism, Agritourism, the Arts, and Cultural Opportunities
- Grow Agriculture and Forestry Industries

Three of the goals above, numbers one, three, and six were identified in the 2006 Economic Development Strategic Plan. The first goal in the 2006 plan was more general, however, referencing "encourage business and workforce development". The participants and advisory committee felt that this key issue was one of the County's biggest weaknesses and challenges. It became apparent that education and workforce development needs were significant enough to require strategies and action items independent of "business development" needs. Similarly, "business development" did not speak clearly enough to the more specific concepts of recruitment, retention, and expansion.

Strategies to achieve the six goals, as well as action items to support those key strategies, were identified utilizing known economic development tools, an understanding of the capacity of Chenango County municipal entities and partner economic development agencies, and feedback received from the numerous participants in the planning process. The Goals, Strategies, and Action items section is located on page 55.

Historical Economic Development

Many of Chenango County's communities have historically relied upon agricultural (mainly dairy farming) and manufacturing activities to support their local economies.

The importance of agriculture and forestry products today in Chenango County's economy is not to be overlooked. Chenango County was ranked 21st of 55 counties in NYS for dairy production as of the 2007 US Agricultural Census, and ranked 159th among 2,493 United States counties in terms of total milk production. Timber products and field crops are secondary Chenango County cash crops. Wood manufacturing remains a predominant manufacturing industry. Chenango County is ranked 4th in the state for cut Christmas trees, and 10th for haylage, silage, and forage production. The county-level rankings for 2012 were not yet available as of this update. In recent years, organic agriculture has increased in Chenango County, and as of the 2012 census, 21 certified organic farms were operating, ranking the county as 12th in New York State for total number of certified organic farms.

Similarly, the backbone of Chenango County's economy evolved from the inventions and creations of numerous ingenious men in the 1800's and early 1900's. Products such as the Maydole Hammer, Pepto Bismol, Chloroseptic, and milk by-products in the dairy and adhesive categories were invented and manufactured in Chenango County.

Today, Chenango County manufacturers produce forklifts, pharmaceuticals, rope and cord, transportation components, aerospace components, specialty fine art paints, and dairy related products. Processed agricultural products have proven to be an emerging industry in Chenango County. Nonetheless, manufacturing in Chenango County has declined greatly in the past 50 years due to global competition and the trend for manufacturing facilities to relocate to other countries with lower labor costs. This trend is showing signs of reversing, however, and some local manufacturers report an increased ability to compete using high quality, highly skilled local labor in a relatively cost-effective environment.

Over the last ten years, the service sector of Chenango County's economy has grown considerably, including expansions in the banking, insurance, telecommunications, and healthcare industries. The contributions of this sector to Chenango County's recent economic successes should not be overlooked.

Consolidated Agencies & the Planning Process

As noted in the 2006 Economic Development Strategic Plan, Chenango County and its economic development partners invested time and resources in a major consolidation of economic development programs, services, and agencies. The groundwork for this consolidation of limited resources was laid prior to the 2006 plan, but much of the implementation work had yet to be completed.

Since the last economic development plan, the official consolidation of numerous county agencies under the umbrella organization "Commerce Chenango, Inc." has been realized. The Development Chenango Corporation, which is managed by Commerce Chenango, is itself a consolidated entity, the result of joining the Chenango County Area Corporation with the Greater Norwich Local Development Corporation (which was formed predominantly for the creation and implementation of the Greater Norwich Empire Zone, a program which New York State discontinued in 2009). The County of Chenango Industrial Development Agency, a public authority for the purpose of promoting industrial development and job creation within Chenango County, is still an independent quasi-municipal organization, but is also managed under the Commerce Chenango umbrella.

The County of Chenango Department of Planning and Development oversees the planning efforts of the county and numerous municipalities which do not have capacity to retain their own planning and development staff. Significant time is invested in supporting the economic development work at Commerce Chenango and the community development work of Opportunities for Chenango. The City of Norwich retains an independent community development and planning department, with one staff member, and works closely with Commerce Chenango on many projects. The county and the city each have their own revolving loan funds and offer programs and services that do not directly overlap with those provided by Commerce Chenango.

Many of Chenango County's smaller municipalities also have revolving loan funds for economic development projects, but lack the staff to actively pursue development opportunities within their borders. Elected officials often become involved in projects and attempt to spur economic growth due to the lack of resources at the local level.

Efforts to streamline these agencies have resulted in the consolidation of governing boards (when feasible); resource sharing; improved communications; elimination of duplicate services; and joint management and oversight of financial resources. The core of this effort has been improved customer service, and the development of one county-wide vision and mission to best serve the County. With a more seamless collaboration, the intent was for one strategic lead agency to direct the County's economic development efforts, focusing on clearly defined outcomes and increased client accountability. The "one-stop-shopping" concept for economic development and business support in Chenango County has proven successful, as clients who call or visit Commerce Chenango can learn about each organization and what resources they offer (i.e. tax incentives, loan programs, business planning support, and networking opportunities) with a single communication.

The County-wide Economic Development Strategic Plan became a document that the agencies and municipalities listed above could all reference and utilize in their work. It was a document which resulted from a comprehensive planning process, through the assistance of consultants, which unified numerous municipalities and agencies behind a common set of goals and a unified purpose. This Economic Development Strategic Planning Update, led by Commerce Chenango, seeks to retain the core of the 2006 plan, while integrating fresh data and new perspectives, resulting in a new guidance document that the consolidated economic development partners can utilize for years to come. This plan, developed through the use of ongoing public outreach efforts, will prioritize projects, identify potential funding sources, and provide information regarding plan implementation, including actions to strengthen the viability of numerous Chenango County business sectors, in addition to positioning the county to more effectively recruit, retain, and expand its business base.

Previous Planning Efforts

In drafting an updated strategic plan, the staff looked to previous planning efforts to have a comprehensive view of the County and stakeholder agency's work, and ways those plans and goals should be incorporated into this update. A summary of previous planning efforts can be found attached as Appendix E.

PART 3: THE PLANNING PROCESS

Public Participation

Incorporation of public input throughout the updated plan's development was a key element of the planning process. In order to develop an action plan built on a foundation of common goals and objectives, it was imperative to receive feedback from the County's elected and appointed leaders, partner agencies, business owners, and residents. Public participation and feedback was sought through direct business and municipal leader surveys, public SWOT sessions, roundtable discussions with partner organizations, and stakeholder engagement throughout the process.

Representatives from local businesses, industries, institutions, government agencies, and non-profit organizations, participated in the development of the Economic Development Strategic Plan update. These representatives were instrumental in assisting the planning team in identifying areas of focus as well as significant stakeholders in the County's economic and community development future. The representatives met regularly throughout the planning process to coordinate public participation activities and to review SWOT results, survey results, and report drafts.

Business Questionnaire

As part of the public participation effort, invitation letters and stakeholder questionnaires were sent via mail, email, and given in person to approximately 286 Chenango County businesses. 68 individuals responded to the survey, which is a 24% response rate.

The survey sought to obtain the perspective of business owners and decision makers regarding the economic conditions of the last five years and their anticipated business decisions over the next five years. It focused on issues surrounding employment, workforce development, infrastructure, business development services and programs, and anticipated capital investments.

The survey also included questions regarding the "Strengths, Weaknesses, Opportunities, and Threats" related to economic development in Chenango County. A summary of this survey and the responses received is attached as Appendix B.

Municipal/Legislative Questionnaire

Commerce Chenango's economic development division conducted a survey with Chenango County municipal leaders to learn more about the economic development needs of their communities and the County. The survey was sent via mail to 29 municipal leaders that represent different communities throughout the County. Twelve recipients completed the survey—representing a 41% response rate.

Municipal leaders were asked several questions related to economic development activities in their municipalities and throughout Chenango County. A comprehensive summary of the survey results is attached as Appendix C.

Economic Development SWOT Workshops

In the fall of 2012, Commerce Chenango held four public comment sessions throughout Chenango County. Sessions were held on September 10, at Bainbridge-Guilford School; on September 12th at DCMO BOCES in Norwich; September 20th at Unadilla Valley Central School; and on September 25th at the Moore Memorial Library in Greene.

At each session, a Powerpoint presentation was shared with participants that provided them an overview of updated demographic information for Chenango County, the economic development strategic planning process, and the history of planning in Chenango County. The definition/meaning of economic Strengths, Weaknesses, Opportunities, and Threats was shared with the group prior to each brainstorming session. The Powerpoint presentation is attached as Appendix A.

At each session, Commerce Chenango facilitators conducted a SWOT analysis to learn what community members believe to be Strengths, Weaknesses, Opportunities, and Threats that impact economic development in Chenango County. Participants were also asked to make suggestions and provide feedback regarding the current economic development climate, programs, and defined SWOT's resulting from their session.

A summary document providing an overview of the top topics/ideas discussed during two or more of the meetings is attached as Appendix D.

Stakeholder Feedback and Planning Sessions

In October and November of 2012, Commerce Chenango hosted five meetings with various partner agencies, municipalities, and stakeholders regarding the Economic Development Strategic Plan Update. The results of the SWOT analyses were shared with these stakeholders in order to allow them to provide additional feedback. These groups represented the following five major topic areas for economic development in Chenango County, with the specific agencies represented listed below:

Housing & Community Development: Chenango County Housing Council, the County Planning Department, the City of Norwich Planning Department, Opportunities for Chenango, the New Berlin Housing Council, Catholic Charities, Chenango Housing Improvement Program.

Economic Development & Planning Agencies/Departments: Promote Oxford Now/Oxford IDA, the Bainbridge Development Corporation, and City of Norwich Planning Department. Feedback was sought from the Sherburne Local Development Corporation and the Norwich Business Improvement District.

Tourism Promotion & Development: Chenango County Arts Council, Cornell Cooperative Extension, Colorscape Chenango Arts Festival, the Chenango Blues Festival (with numerous other tourism properties and events provided the opportunity for feedback).

Agriculture & Forestry Development: Cornell Cooperative Extension, the County Planning Department, Farm Bureau, the City of Norwich Planning Department, the Ag & Farmland Protection Board, the Ag Development Council, and local farmers.

Education and Workforce Development: Chenango, Delaware, Otsego (CDO) Workforce Investment Board, the County Planning Department, DCMO BOCES representatives, the Morrisville State College Norwich Campus, the Norwich Central School District Board of Education, and the Superintendents of every Chenango County school district.

Discussions at these stakeholder meetings contributed to the development of the Goals/Strategies/Action Items denoted later in this plan. Stakeholder groups were helpful in identifying priority areas and brainstorming ideas to help achieve the six key goals. Specific ideas for action items were discussed at these meetings, and the capacity of specific partner organizations to support the work plan was identified.

The roles and responsibilities of these partner organizations, as well as numerous other supporting groups, agencies, and funding sources, are identified at the end of this document in the “Implementation Plan” section, as well as listed under appropriate Action Items in the Action Matrix.

PART 4: DEMOGRAPHIC PROFILE

Introduction

This section summarizes a number of trends, including social, economic, and housing characteristics currently impacting Chenango County. For comparative purposes, data for New York State and the U.S. will be evaluated, where appropriate. This information is comprised of data collected from the U.S. Census Bureau, from the Population and Housing information gathered during the 2000 and 2010 Census; the U.S. Bureau of Labor Statistics, the New York State Department of Labor, and the Cornell Program on Applied Demographics. Data from the five adjacent counties have been analyzed and included as well, including: Broome County, Cortland County, Delaware County, Madison County, and Otsego County, for comparative purposes. The region will herein be known as the “six county region”.

Population

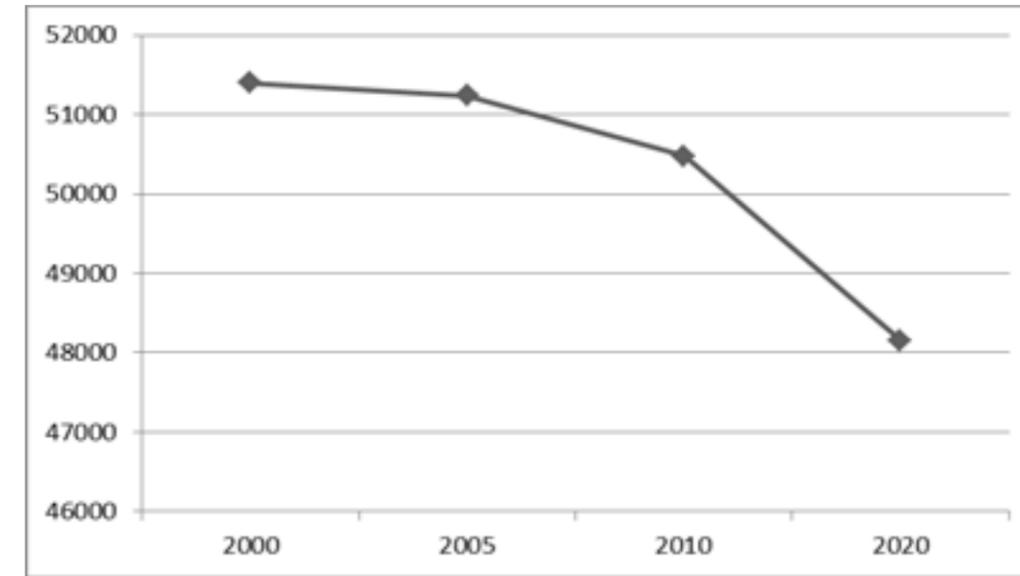
Between 2000 and 2010 the population of Chenango County decreased by 1.8%, from 51,401 in 2000 to 50,477 in 2010. During the same period, the other counties within the six county region experienced either a far lesser decline in population (Delaware) or an increase in population (the remaining four counties). While most increases were very small, Madison County, Chenango’s neighbor to the north, increased its population by nearly 6%. Comparatively, New York State as a whole experienced a 2.0% increase in population, and the United States population increased by nearly 10%. Both the state and national population increases are less than projected.

Table 1: Population Trends

| Area | 2000 | 2005 | 2010 | 2020* | 2000-2010 % Change | 2000-2020 % Projected Change |
|---------------|-------------|-------------|-------------|-------------|--------------------|------------------------------|
| Chenango | 51,401 | 51,239 | 50,477 | 48,154 | -1.8% | -6.3% |
| Broome | 200,536 | 197,709 | 200,600 | 199,743 | +0.03% | -0.04% |
| Cortland | 48,599 | 49,162 | 49,336 | 49,008 | +1.5% | +0.84 |
| Delaware | 48,055 | 46,236 | 47,980 | 46,717 | -0.15% | -2.8% |
| Madison | 69,441 | 70,473 | 73,442 | 75,997 | +5.8% | +9.5% |
| Otsego | 61,676 | 65,662 | 62,259 | 62,094 | +0.9% | +0.67% |
| New York | 18,976,457 | 19,411,913 | 19,378,102 | 19,697,021 | +2.0% | +3.8% |
| United States | 281,421,906 | 298,727,898 | 308,745,538 | 324,927,000 | +9.7% | +15.5% |

*Projected population values from Cornell Program on Applied Demographics; United States figure from US Census Bureau Middle Series Population Projections

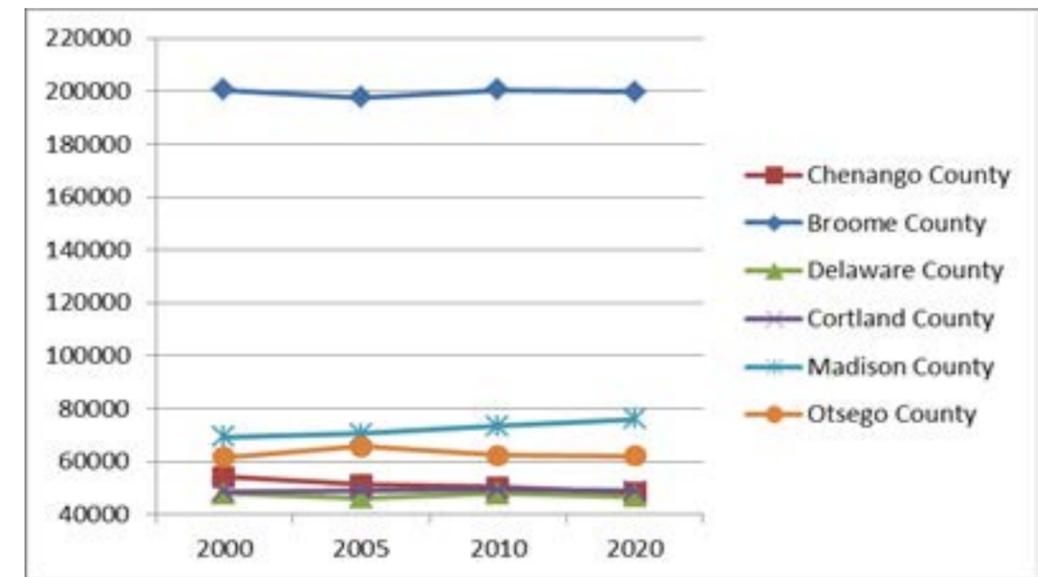
Graph 1: Chenango County Population Trend, 2000-2020



* Data from US Census Bureau; Projected figures from Cornell University Pro-

According to the Cornell University Program on Applied Demographics, from 2010 to 2020 the population of Chenango County is projected to decline further, with an additional loss of over 2,300 people. A decline is also projected for four of the five remaining counties in the region, with exception of Madison County, which is expected to increase by another 3.5%. These trends are unsettling to local stakeholders, and population loss, as well as the aging population, are important issues to address with this strategic plan.

Graph 2: Comparable County Population Change, 2000-2020



* Data from US Census Bureau; Projected figures from Cornell University Program on Applied Demographics

Age Distribution

The age distribution in Chenango County has demonstrated a decrease among younger age groups (under 5, 5-14, 15-19, 20-24, 25-34, and 35-44), while increasing among older residents (over 65). Projections for population over the next ten to twenty years show a concerning, and continuing, trend.

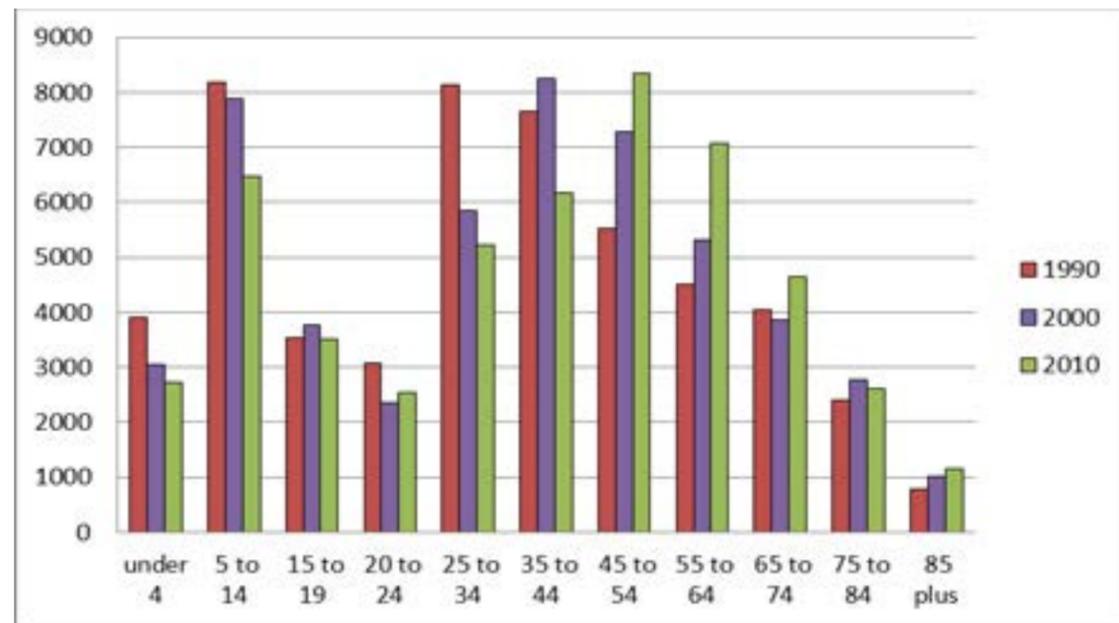
As illustrated in Graph 3, Chenango County has experienced declines in the younger age groups each decade (on average), while experiencing increases in the higher age groups (over 45). The graph to the right is a staggering illustration of this dramatic change over the last twenty years.

The only youth age group that holds relatively steady is the 15-19 year old group. The substantial loss in the 25-34 and 35-44 age groups from 1990 to 2010 demonstrate a correlation to the loss in the under four and 5-14 age groups during that same period.

As seen in Graph 3 and Table 2 (next page), Chenango County's population differs from that of New York State and the United States. According to the 2010 US Census, the County had a higher percentage of residents aged 35 and over than New York State and the U.S. Chenango County had a slightly lower percentage of younger residents, with exception of the 5-14 age group, as compared to New York State, which was a half percentage point higher.

The greatest difference between Chenango County, the state, and the nation lies in the 20-24 and 25-34 age groups. Chenango County's population in this age demographic is two full percentage points lower than New York State's or the United States. Finally, the median age for the County was significantly higher than the State or United States, falling in at 42.9, as compared to New York's 38 and the United States at 37.2. Regionally, Broome, Otsego, and Delaware County also experience median ages higher than the national or state medians, while Cortland County skews the youngest at 35.8 (2010).

Graph 3: Population Change by Age Group, 1990-2010



Source: US Census Bureau, 1990, 2000, 2010

Table 2, Comparison Population by Age, 2010

| Age | Chenango County | | | New York State | | | United States | |
|------------|-----------------|--------|--------|----------------|--------|--------|---------------|--------|
| | Total | % | % | Total | % | % | Total | % |
| 0-4 | 2,735 | 5.4% | 5.4% | 1,155,822 | 6.0% | 6.0% | | 6.5% |
| 5-14 | 6,456 | 12.8% | 12.8% | 2,375,411 | 12.3% | 12.3% | | 13.3% |
| 15-19 | 3,505 | 6.9% | 6.9% | 1,366,278 | 7.1% | 7.1% | | 7.1% |
| 20-24 | 2,548 | 5.0% | 5.0% | 1,410,935 | 7.3% | 7.3% | | 7.0% |
| 25-34 | 5,227 | 10.4% | 10.4% | 2,659,337 | 13.7% | 13.7% | | 13.3% |
| 25-44 | 6,182 | 12.3% | 12.3% | 2,610,017 | 13.5% | 13.5% | | 13.3% |
| 45-54 | 8,349 | 16.5% | 16.5% | 2,878,691 | 14.8% | 14.8% | | 14.6% |
| 55-64 | 7,062 | 14.0% | 14.0% | 2,303,668 | 11.9% | 11.9% | | 11.8% |
| 65-74 | 4,636 | 9.2% | 9.2% | 1,360,602 | 7.0% | 7.0% | | 7.0% |
| 75-84 | 2,615 | 5.2% | 5.2% | 866,467 | 4.5% | 4.5% | | 4.3% |
| 85+ | 1,152 | 2.3% | 2.3% | 390,874 | 2.0% | 2.0% | 5,493,433 | 1.8% |
| Total | 50,477 | 100.0% | 100.0% | | 100.0% | 100.0% | | 100.0% |
| Median Age | 42.9 | | | 38 | | | 37.2 | |

Source: US Census Bureau, 2010

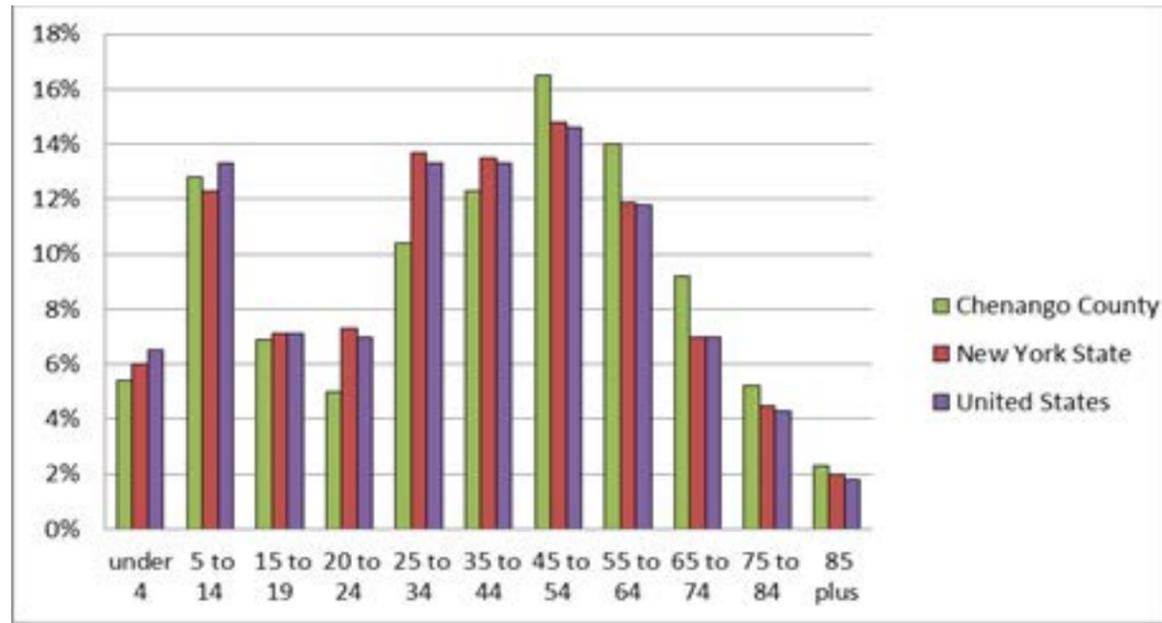
Chenango County, like many other New York counties, struggles to attract young adults and families into the area, which could help balance the aging of the existing population. While Graph 3 demonstrated population change in Chenango County over time by age group, Graph 4 demonstrates how this change has impacted Chenango County as compared to New York State and the United States.

Graph 4, to the right, demonstrates that Chenango County is below average in the under 4 age group; nearly on par or above in the 5-14 and 15-19 age groups; and experiences significantly lower population percentages in the 20-24 and 25-34 age groups as compared to the state and nation. However, the Graph also demonstrates that from the 45-54 age group on up, Chenango County has a higher percentage of population from these groups—dramatically higher in the 45-54, 55-64, and 65-74 groups.

The main reasons identified for the increasing median age may be young adults leaving the area with their young children in search of better job opportunities, as well as the 20-24 age group moving away for college and job opportunities.

While most other New York State counties have a large higher education institution which can help retain and attract the 20-24 age group, Chenango County does not, and tends to lose its young adults to other counties and states. Non-college bound young adults choose to seek employment outside the area. As a long-term economic development and planning issue, community leaders, economic developers, planners and educators will all need to find ways to creatively address these issues.

Graph 4: Population by Age in Chenango County, 2010



Source: US Census Bureau, 2010

Housing

As of 2010, there were 24,710 housing units in Chenango County, 82.7% % of which were occupied. There was a 3.40% increase in total housing units during the 2000's. Compared to surrounding counties in the region, Chenango's increase was quite low, with only Cortland and Broome counties adding lower percentages of housing units (Cortland added 2.3%, Broome only 2.0%). Conversely, Madison County had a 10.8% increase in housing units; Otsego had an 8% increase, and Delaware had a 7.8% increase.

Owner occupied units made up 75% of the total occupied housing units in Chenango County. Renter occupied units made up approximately 25%. This proportion of housing tenure changed .30% for both owner and renter occupied from 2000 to 2010.

It is interesting to note that Chenango County's 2010 vacancy rate, at 17.30% is significantly higher than the State and National vacancy rates. This was a 7.80% increase from 2000. In addition, it is higher than the State rate of 9.7% and the national rate of 11.4% in 2010. Some counties in the region had even more startling vacancy rates, including Delaware at 36.3% and Otsego at 20%. The high vacancy rates in Delaware and Otsego counties can be attributed to a significant number of units being dedicated to seasonal, recreational, or vacation homes, with Delaware at 83% of vacant homes dedicated to those uses, and Otsego with nearly 60%. Madison, Broome, and Cortland fell in line with state and national rates at 12.6%, 9.3% and 9.3%, respectively.

It is important to note that over 60% of the vacant housing units in Chenango County were for seasonal, recreational, or occasional use. This represents an increase of 32.44% since 2000. Between 2000 and 2010, the number of vacant units in Chenango County grew by 7.82%, while the number of renter occupied housing units increased by 3.94%. The total number of units available for rent decreased by over 40%, however, and the number of vacant homes available for sale decreased by 37%. Overall, the decreasing trend in available homes for sale or rent demonstrates an improving housing market, and also demonstrates that many of the homes available for purchase

in 2000 were purchased by individuals or families not declaring Chenango County as their primary residence, or residents of Chenango County wanting a second home, camp, or investment property.

It is also important to note is the variation on vacancy rate by municipality within Chenango County. For instance, the Village of New Berlin as an extremely high vacancy rate 21%, with 60% of those dedicated to seasonal or recreational use. The Town of Oxford's rate was also high, at 18.9%, and 58% of those vacancies were seasonal or recreational. The City of Norwich vacancy rate was 9.2%, Sherburne's rate was 9.7% in 2010, and Greene's was 12.3% in 2010.

The trends in Chenango County point towards it becoming a "bedroom community". While there can be economic benefits to housing many individuals or families for seasonal/recreational uses, such as property tax revenue, retail and service revenues, and sales tax revenues (without as big a drain on public infrastructure and school systems), these individuals do not contribute year round to the communities in which they live, economically speaking; they are not generally available to contribute towards workforce development needs; they do not generate as much economic activity annually as an owner occupied residence might.

Table 3: Housing Inventory, 2000 and 2010

| Characteristics | 2000 | 2000 | | 2010 | 2010 | | 2000-2010 |
|------------------------------|--------|---------|---------|--------|---------|---------|-----------|
| | Number | % | | % | Number | | % |
| Total housing Units | 23,890 | 100.00% | 100.00% | 24,710 | 100.00% | 100.00% | 3.40% |
| Occupied housing units | 19,926 | 83.40% | 83.40% | 20,436 | 82.70% | 82.70% | 2.56% |
| Vacant housing units | 3,964 | 16.60% | 16.60% | 4,274 | 17.30% | 17.30% | 7.82% |
| Occupied housing units | 19,926 | 100.00% | 100.00% | 20,436 | 100.00% | 100.00% | 2.56% |
| Owner-occupied housing units | 15,005 | 75.30% | 75.30% | 15,321 | 75.00% | 75.00% | 2.10% |

Source: US Census Bureau, 2000, 2010

As indicated in Table 5, detached single-family homes (62.8% of the total in 2010) and mobile homes (21.3% in 2010) are the two most prevalent housing types in Chenango County. This housing composition is generally characteristic of rural upstate New York counties. The largest increase in housing development during the 2000's occurred among detached single-family homes (an increase of 1,121 units).

Housing Value and Age

The 2010 Census recorded a 43.9% increase in the value of specified owner occupied units in Chenango County, with the median home value increasing from \$62,700 as of the 2000 Census summary to \$90,200 as of the 2008-2010 Census 3-year estimates. Approximately 69.9% of all owner occupied homes in Chenango County are valued between \$50,000 and \$199,999.

The increase in housing value in Chenango County is sluggish when compared to National trends, considering the median specified owner occupied housing value for single family homes in the US Increased by more than 56.8% during that time (increasing from \$119,600 in 2000 to \$187,500 in 2010). Additionally, the median house value in New York State reported on the 2008-2010 3-year estimates was \$304,100, which is significantly higher than Chenango County.

The age of owner-occupied houses in Chenango County trends higher than either New York State or the National average. The US Census Bureau reports that 42.5% of Chenango County's owner-occupied homes were built prior to 1939. Only 5.1% were built after 2000. In New York State, only 33.8% of the homes were constructed prior to 1939; nationally, the percentage falls to 13.9%. In the US 27.6% of the homes were built after 1990; in New York that number falls to 11.8% and in Chenango County, it is 14.8%.

Housing and lodging quality, purpose, design, and availability throughout Chenango County arose as an issue during numerous planning discussions. Residents, businesses, municipal officials, and stakeholder groups alike expressed sentiments of inadequacies of the existing housing market and specific needs in several categories: low-income housing/apartments, higher end housing (for recruitment of professionals, doctors, etc.), senior housing, and long-term stay executive housing.

There are several roadblocks to developing the housing that community planners and stakeholders believe would better meet the needs of residents. In general, the housing market in rural Chenango County is significantly more depressed than in more suburban areas with higher concentrations of economic activity.

Table 4: Type of Specified Owner-Occupied Units, 2000 and 2010

| Unit Type | 2000 | 2010 | | 2000-2010 | | % Change |
|--------------------|--------|-------|--------|-----------|-------|----------|
| | Total | % | Total | % | % | |
| 1 Family, detached | 14,349 | 60.1% | 15,470 | 62.8% | 62.8% | 7.8% |
| 1 Family, attached | 233 | 1.0% | 275 | 1.1% | 1.1% | 1.8% |
| 2 Family | 1,510 | 6.3% | 1,502 | 6.1% | 6.1% | -0.05% |
| 3 or 4 Family | 1,120 | 4.7% | 1,143 | 4.6% | 4.6% | 0.2% |
| 5 to 9 Family | 494 | 2.1% | 331 | 1.3% | 1.3% | -33.0% |
| 10 to 19 Family | 163 | 0.7% | 177 | 0.7% | 0.7% | 0.9% |
| 20+ Family | 481 | 2.0% | 455 | 1.8% | 1.8% | -5.4% |

Source: US Census Bureau, 2000, 2010

Additionally, the cost of materials and labor causes the cost of construction on many homes and projects to exceed the ultimate market value of that same home or building upon project completion. Therefore, the ability of a developer or investor, or even average homeowner, to attract the funding necessary to invest in new housing development is lower than in other markets.

It is noteworthy that several Chenango County communities have a supply of beautifully maintained historic homes, many of which are excellent examples of Greek Revival, Late Victorian, Federal, Romanesque, Italianate, and Queen Anne architectural styles. Some of these homes are within "historic districts", which are listed on the National Registry of Historic Places. Some of these homes have been lovingly restored and well-cared for, while others have fallen into disrepair as the cost of upkeep and maintenance are not feasible for some homeowners. Many employers report that the housing market is inadequate to meet the needs of individuals being recruited to fill positions at their companies, and therefore, many families are choosing to purchase homes outside of Chenango County. This is a long-term issue that needs to be addressed by county leaders.

Educational Attainment

National trends have indicated that more and more individuals are attaining higher levels of education, while the number of individuals having a high school education or less has been steadily decreasing. Chenango County residents exceed the State and National averages at the lower end of the spectrum, but fall short of State and National averages at the higher end.

Table 5: Educational Attainment, 2010

| | Chenango County | Chenango County | New York | United States |
|--|-----------------|-----------------|---------------|---------------|
| Attainment Level | Number | % | % | % |
| Population 25 years and over | 35,113 | | | |
| Less than 9th Grade | 1,200 | 3.4% | 7.0% | 6.2% |
| 9th to 12th grade, no diploma | 4,051 | 11.5% | 8.6% | 8.7% |
| High school graduate | 13,915 | 39.6% | 28.2% | 29.0% |
| Some college, no degree | 6,031 | 17.2% | 15.9% | 20.6% |
| Associate degree | 3,955 | 11.3% | 8.2% | 7.5% |
| Bachelor's degree | 3,591 | 10.2% | 18.3% | 17.6% |
| Graduate or professional degree | 2,370 | 6.7% | 13.8% | 10.3% |
| Total | | 100.0% | 100.0% | 100.0% |

Source: US Census Bureau, 2010

A majority of Chenango County's residents 25 years and older have a high school diploma. In fact, about 40% of residents are high school graduates, while 15% lack a diploma. This is an improvement since 2000, when about 20% lacked a diploma. Approximately 60% of Chenango County residents have never attended college. In addition, only 14% of residents over the age of 25 have received a bachelor's degree or higher.

The U.S., and the Northeast in particular, is experiencing a decline in blue-collar and unskilled jobs. Ongoing employment trends have indicated an increase in professional service positions, which require a higher level of education. As a result, this lack of education among employees countywide is likely to impact the extent of the County's future economic growth.

Recent trends in manufacturing have also indicated that a higher skill level is required for most "blue collar" jobs today than decades ago. Additionally, issues lack of basic entry-level "ready to work" skills have become pervasive for many employers. Many manufacturers have expressed difficulty finding qualified, semi-skilled laborers. The need for training and retraining of the workforce in Chenango County is vast.

Income

Despite Chenango County's population decline, the County significantly gained in income between 2000 and 2010. The proportion of households with an annual income less than \$34,999 decreased from 52% in 2000 to 46% in 2005. The proportion of households earning \$75,000 or more increased from 12% to 17%.

Table 6: Household Income, 2010

| Table 6: Household Income, 2010 | Chenango County | Chenango County | New York | United States |
|---------------------------------|-----------------|-----------------|----------|---------------|
| Income | Number | % | % | % |
| Less than \$15,000 | 2,781 | 13.8% | 13.4% | 12.7% |
| \$15,000 to \$24,999 | 2,606 | 13.0% | 10.0% | 10.8% |
| \$25,000 to \$34,999 | 2,246 | 11.2% | 9.4% | 10.5% |
| \$35,000 to \$49,999 | 3,600 | 18.0% | 12.6% | 14.1% |
| \$50,000 to \$74,999 | 3,977 | 19.9% | 17.4% | 18.6% |
| \$75,000 to \$99,999 | 2,548 | 12.7% | 12.2% | 12.3% |
| \$100,000 to \$149,000 | 1,605 | 8.0% | 13.5% | 12.3% |
| \$150,000 or more | 626 | 3.2% | 11.6% | 8.6% |
| Households | 19,989 | 100% | 100% | 100% |
| Median Household Income - 2000 | 33,679 | | 43,393 | 41,994 |
| Median Household Income - 2010 | 43,943 | | 55,603 | 51,914 |
| Median Family Income - 2000 | 39,711 | | 51,691 | 50,046 |
| Median Family Income - 2010 | 52,229 | | 67,405 | 62,982 |

Source: US Census Bureau, 2010 ACS 5-Year Estimates

Chenango County has a higher percent of households earning \$34,999 or less than does the State or the U.S (Chenango County's share is approximately eight percent higher). This explains the County's lower median household income (\$33,650) relative to the State (\$43,582) and U.S. (\$42,164). The County exceeds the State and National share of households that make \$35,000 - \$74,999 by approximately 3% and .1%, respectively.

Despite a slightly declining median family income in 2000, the Chenango County's poverty rate was 12.9% in 2000, which was 1% lower than the State and 1% higher than the National rate.

Employment Trends

The Chenango County historical employment landscape was largely agricultural in origin. In the late 1800's, however, numerous products were invented in Chenango County and began to be manufactured here. This included the Maydole hammer, numerous pharmaceutical products (Norwich Pharmacal Company, established in 1885). Additional jobs were found at gristmills, sawmills, woolen mills. Large infrastructure projects such as the Chenango Canal (1833-1878) and the Erie Lackawanna Railroad also provided employment to the area. Major closures of past few decades are summarized in the Industry Analysis and Economic Profile section of this plan. In an April 2014 report, the NYS Dept. of Labor noted Chenango County as one of five NYS counties with the most rapid private sector job growth from April 2013-April 2014, with a 2.1% increase in employment. The chart below demonstrates Chenango's key industry sectors as compared to NYS and the US.

Table 7: Employment by Industry, 2000 and 2010

| Industrial Sector/Industry | Chenango County 2000 | | Chenango County 2010 | | New York 2010 | United States 2010 |
|--|----------------------|-------|----------------------|-------|---------------|--------------------|
| | Number | % | Number | % | % | % |
| Agriculture/Forestry/Fishing/Mining | 883 | 3.9% | 980 | 4.3 | 0.6% | 1.9% |
| Construction | 1,353 | 6.0% | 1,583 | 6.9% | 5.9% | 7.1% |
| Manufacturing | 4,938 | 21.7% | 4,397 | 19.3% | 7.2% | 11.0% |
| Wholesale Trade | 580 | 2.6% | 510 | 2.2% | 2.8% | 3.1% |
| Retail Trade | 2,418 | 10.6% | 2,515 | 11.0% | 10.6% | 11.5% |
| Transportation/Warehousing/Utilities | 961 | 4.2% | 799 | 3.5% | 5.3% | 5.1% |
| Information | 703 | 3.1% | 630 | 2.8% | 3.1% | 2.4% |
| Finance/Insurance/Real Estate/Rental and Leasing | 1,266 | 5.6% | 1,547 | 6.8% | 8.6% | 7.0% |
| Professional/Scientific/Mgmt/Admin/Waste Mgmt Services | 1,123 | 4.9% | 1,290 | 5.7% | 10.8% | 10.4% |
| Educational/Health/Social Services | 5,350 | 23.6% | 5,450 | 23.9% | 26.6% | 22.1% |
| Arts/Entertainment/Recreation/Lodging/Food Services | 1,195 | 5.3% | 1,331 | 5.8% | 8.5% | 8.9% |
| Other Services | 938 | 4.1% | 890 | 3.9% | 5.0% | 4.9% |
| Public Administration | 1,006 | 4.4% | 887 | 3.9% | 4.9% | 4.8% |
| Total | 22,714 | 100% | 22,809 | 100% | 100% | 100% |

Source: US Census Bureau, 2010 ACS 5-Year Estimates

= Three top industries by percentage and total employment
 = Three industries showing the greatest growth from 2000-2010

Projections from NYS Department of Labor 2010-2020 Employment Prospects Report (www.labor.ny.gov/stats) shows that the key industrial sectors anticipated to expand in the Southern Tier include: transportation and material moving; food processing, preparation, and food service; vehicle/mobile equipment mechanics, installers, repairers; construction extraction & construction trades; personal care and service occupations; sales and retail; health practitioners, technologists and healthcare support occupations; community and social services; business and financial; and computer and math occupations.

Of note is the forecast for printing industry jobs to decline by nearly 24%. Since Chenango County has several printing manufacturers, which could be detrimental to the local economy. Another disturbing forecast item is a 27% reduction in “communications equipment operators”, which could impact call-center oriented positions in Sherburne and Norwich.

Table 8: Resident Non-Farm/Forestry Occupation, 2010

| | Chenango County | Chenango County | New York | United States |
|-------------------------------------|-----------------|-----------------|----------|---------------|
| Occupation Type | Total | % | % | % |
| Management/Professional | 6,996 | 30.7% | 37.9% | 35.3% |
| Service industry | 3,949 | 17.3% | 19.1% | 17.1% |
| Sales/Office and Admin Support | 5,083 | 22.3% | 25.2% | 25.4% |
| Construction/Extraction/Maintenance | 2,457 | 10.8% | 7.8% | 9.8% |
| Production/Transportation/Material | 4,324 | 19.0% | 9.9% | 12.4% |
| Total | 22,809 | 100.0% | 100.0% | 100.0% |

Source: US Census Bureau, 2010

Workforce Development

Problems with workforce readiness, available workforce, and workforce development programs are a national issue. Employers around Chenango County and nationwide are expressing frustration with the workforce available to them to fill job openings at every level. Whether an employer has a handful of positions open during a given year, or hundreds, most Chenango County employers report some difficulty or challenges in identifying qualified candidates to fill their openings.

Issues with the mis-match of available workforce skills and the needs of local employers are only one contributing factor to the difficulty they experience in filling open positions. The overall declining population of Chenango County, and the gradual aging of the remaining population, is a significant contributor to the shrinking workforce. As the next section of this plan will explore, a high prevalence of disabilities within Chenango County as compared to 60 other NYS counties is another contributing factor.

Additionally, many employers report barriers to recruitment for qualified individuals considering working in or moving to Chenango County. Due to other issues identified in this plan, including adequate housing stock, adequate shopping and restaurant choices, educational offerings, and more, many professionals choose to live in other communities and commute to Chenango County. This further aggravates the declining population

problem and limits workforce opportunities—because spouses that could be joining the local workforce are instead residing in other nearby counties. The county and economic development agencies should consider what programs or opportunities exist to work with local employers to counteract this growing trend.

Many local agencies and individuals are working to mitigate the workforce development challenges present in Chenango County. Numerous programs and services exist which are available to local employers and to those seeking employment which should help further develop the workforce, the skills they possess, and the ease with which employers can find the right person with the right skill set to fill open positions. The Workforce Investment Board (WIB), Department of Labor (DOL), Job Service Employer Committee (JSEC), Commerce Chenango Economic Development, Opportunities for Chenango (OFC), Chenango County Department of Social Services (DSS), DCMO BOCES, Morrisville State College Norwich Campus, Chenango United Way, and school districts all contribute to educational and workforce development programming in one way or another. These groups receive feedback directly from employers regarding existing workforce development challenges in Chenango County, and opportunities for growth.

Some key concepts for future programming and services could include: exposing students to local work opportunities at a younger age; educating children regarding a wider variety of local employment opportunities—particularly the non-college bound students—and what they can do to prepare for those opportunities; expanding internship opportunities available through Morrisville College; expanding course opportunities at DCMO BOCES and Morrisville College; and focusing on on-the-job training and other ways to directly meet employer and worker needs.

As of the writing of this plan, a workforce collaborative was being formed to dig deeper into key issues and begin charting some solutions to be implemented over a several year period.

Table 9: Employment Status, 2010

| | Chenango County | Chenango County | New York | United States |
|------------------------------------|-----------------|-----------------|----------|---------------|
| Labor Force | Number | % | % | % |
| In the Labor Force | 24,824 | 60.9% | 63.7% | 65.0% |
| Employed civilian population 16+ | 22,809 | 56.0% | 58.8% | 59.4% |
| Unemployed civilian population 16+ | 1,998 | 4.9% | 4.8% | 5.1% |
| Armed Forces | 17 | 0.0% | 0.2% | 0.5% |
| Not in Labor Force | 15,924 | 39.1% | 36.3% | 35.0% |
| Total Population 16 years+ | 40,748 | 100.0% | 100.0% | 100.0% |

Source: US Census Bureau, 2010

Persons with Disabilities & The Workforce

A recent report of the New York Makes Work Pay project has identified Chenango County as the county in New York State with the highest percentage of disability prevalence in the population.¹ The goal of the report was to improve the employment outcomes and increase financial independence of New Yorkers with disabilities.

Utilizing the US Census Bureau 2008-2010 American Community Survey, the report identified the working age population of the Public Use Microdata Area (PUMA) of Chenango County as an estimated 30,200. Of this number, an estimated 4,200, or 14%, report having one or more disabilities. The New York State average is 8.5%, and the national average is reported at 10%. In Chenango County, 12.7% of women, and 15.3% of men report a disability.

The report identifies that the following factors may correlate and further aggravate the outcomes for those reporting disabilities in Chenango County: 24.8% of those reporting disabilities are not high school graduates, compared to 9.6% of those without disabilities; 32.2% of working-age people with disabilities live below the federal poverty level, which is more than three times the rate for those without disabilities; a smaller percentage of people with disabilities report being married than those who do not have disabilities; and transportation is often noted as a barrier to employment for this population.

Unemployment Rate

The unemployment rate in Chenango County has improved, yet has consistently remained a bit higher than the New York State and national average since the recession began, as demonstrated by the table below.

| | Chenango County (March) | New York (March) | United States (March) |
|-------------|-------------------------|------------------|-----------------------|
| Labor Force | % | % | % |
| March 2014 | 7.1 | 6.9% | 6.7% |
| March 2013 | 8.4 | 7.9% | 7.5% |
| March 2012 | 8.9 | 8.5% | 8.2% |
| March 2011 | 9.0 | 8.1% | 9.0% |
| March 2010 | 10.5% | 8.8% | 9.9% |
| March 2009 | 9.9% | 7.8% | 8.7% |

Source: New York State Department of Labor

I. von Schrader, S., Erickson, W., Vilhuber, L., & Golden, T.P. (2012). Disability and Employment Status Report for Chenango County 2010. Ithaca, NY: Cornell University, Employment and Disability Institute on behalf of the New York Makes Work Pay Comprehensive Employment System Medicaid Infrastructure Grant. February, 2012

Agricultural Employment

Farming has been the backbone of Chenango County's economy for decades, and continues to be a major economic driver in this rural area. .. Each passing decade brings further decline in the total number of farms in Chenango County. In the decade from 2002 through 2012, Chenango lost 132 farms—or 14% of the total. The total land base being farmed decreased by 23%, or 42,750 acres.

Dairy farming, the principal type of farming Chenango County is known for, saw a massive reduction, with a 34% decrease in the total number of dairy cows (or a loss of approximately 6,200 cows). Increases in yogurt production locally and across New York State have continued to demand more milk during the same period, while dairy milk production has seen a large decline. The result is more milk being imported from other areas of New York and from surrounding states to meet the increased dairy manufacturing need.

Some statistics are more promising, however. In the last decade, the market value of goods sold by each farm has increased 46%, or approximately \$25,000. The size of the remaining farms has increased by approximately 7 acres. The total number of beef farms has increased by 18%, or approximately 30 farms—several of which were

likely previously dairy farms.

Other recent growth areas include a significant increase in hogs sold from 2002 to 2012 (from 439 to 2,000) and an increase in the number of chickens sold (from 2,600 to nearly 4,000) over the same period.

Table 10: Agricultural Census Information, 2002 and 2012

| | Chenango County | Chenango County | Chenango County | |
|------------------------------------|-----------------|-----------------|-----------------|--------------------|
| Farming Statistics | 2002 | 2002 | 2012 | % change 2002-2012 |
| Number of Farms | 960 | 960 | 828 | (14%) |
| Land in Farms (acres) | 189,980 | 189,980 | 147,229 | (23%) |
| Acres Per Farm | 195 | 195 | 202 | 4% |
| Market Value of Goods Sold (total) | \$52,282,000 | \$52,282,000 | \$65,934,000 | 26% |
| Market Value Per Farm (average) | \$54,460 | \$54,460 | \$79,630 | 46% |
| Net Income Per Farm (average) | \$10,206 | \$10,206 | \$23,197 | 127% |
| Number of dairy farms | 267 | 267 | 184 | (31%) |
| Total number of dairy cows | 18,334 | 18,334 | 12,137 | (34%) |
| Total beef farms | 168 | 168 | 199 | 18% |
| Total beef cows | 2,776 | 2,776 | 2,474 | (11%) |

Source: US Census Bureau, 2002, 2012 Census of Agriculture

PART 5: COMMUNITY RESOURCES

This section of the plan will focus on those community resources most pertinent to economic development, the goals of this plan, and the implementation of this plan. Numerous additional community resources are available in Chenango County, and additional information on those resources may be requested from the County Planning Department, Economic Development partners, Opportunities for Chenango, or the Chenango United Way.

This section will focus on resources such as transportation, educational resources, workforce development, tourism, arts and cultural resources, natural resources, and infrastructure. Additionally, a summary of historic properties and resources is attached to this plan in Appendix H.

Existing Road Network

The County has an adequate system of interstate, state and local roads that provide transportation accessibility within and throughout the County. The County's existing system enhances the area's rural lifestyle, in that it allows easy access to regional population centers, including cities in New York as well as those in Pennsylvania.

For economic development purposes, transportation networks and accessibility are evaluated in two very different ways, considering the type of business activity involved. Average Annual Daily Travel (AADT) numbers, or traffic counts identifying the number of motorists that pass a specified area, are important to businesses and financiers who are considering market-driven businesses in specified localities.

Industrialists looking to develop a large industrial site or distribution center are more concerned with a site's accessibility to potential employees and delivery trucks and the potential for traffic congestion that can impede business flow. Interstate 88, in particular, is very important from an economic development perspective, as interstate access is regarded as a critical accessibility component. Often the first question major corporations ask when discussing a potential site, lack of interstate access can present a major barrier to development.

NYS Route 8 runs north to south along the County's eastern border; NYS Route 12 runs from the northern central portion of the County to the southwest corner; NYS Route 23 runs east to west through the County's center; NYS Route 80 runs east to west through the northern half of the County; and NYS Route 206 runs east to west through the southern half of the County. The County's only interstate is Interstate Route 88 (I-88), which runs diagonally through the Towns of Afton and Bainbridge in the southeast corner of the County. The State roads primarily have 55 mph speed limits, except where they traverse populated areas and villages. I-88, as is the case with rural area interstates in New York State, is posted for 65 mph.

While the AADT numbers for the County's roads vary, they mostly reflect the County's rural nature. NYS Route 8 varies from 1,862 AADT near the Madison County line to 6,330 near its intersection with County Route 35. NYS Route 12 varies from 2,688 near the Madison County line, to 15,887 in the City of Norwich south of the Main Street/County Route 10A intersection. NYS Route 23 varies from 797 near its County Route 10 intersection, to 5,692 in the City of Norwich near its NYS Route 12 intersection. NYS Route 80 varies from 809 near Smyrna to 1,818 near its intersection with County Route 25 just before the Otsego County line. NYS Route 206 varies from 2,251 near the Delaware County line to 5,220 in downtown Greene. (counts updated June 2014)

Interstate 88 runs from Binghamton, where it connects with Interstate 81, to Schenectady, where it connects with Interstate 90, and within a few miles of there, Interstate 87. Interstate 88 AADT counts from 2014 indicated traffic volumes of 11,849 between exits 7 and 8, and 12,239 between exits 8 and 9 (very modest increases since

2002). Other than I-88, the most important road in the County is NYS Route 12, which provides access to several of the larger communities in the County, including Sherburne, Norwich, Oxford, and Greene. Due to the County's topography, this route is significantly limited by a need for frequent and recurring sharp turns. Despite the fact that it follows the Chenango River valley, the route also traverses highly sloped areas.

An important route to several counties in the Southern Tier region, reconstruction of NYS Route 12 is a long-term project which began in the late-1990's. Several businesses in Chenango County voiced this highway as a major concern for the transportation of raw materials and finished goods, citing travel times, road condition, and other difficulties with the route. NYS DOT embarked on a long-term study regarding alternatives and cost-benefit calculations for this route. A multi-phase reconstruction project was planned, and the bulk of the work was completed as of the writing of this plan update.

The Greene area in particular received significant investment including repaving, addition of passing lanes, widening of intersections, installation of new drainage systems. The NYS Route 12 Corridor study also identified County Route 32 as a potential bypass for Route 12 in the Norwich area, and improvements were made to some parts of Route 32 in an effort to make this alternative safer and more viable. As of the writing of this plan, the County DPW was seeking funding for an additional round of improvements on Route 32 between the Route 23 and Route 320 intersections in Norwich.

Motor Freight Transportation Services

LTL (less than truck load) and truckload freight services are critical to economic development efforts, both from a business attraction retention perspective. While at one time, most major freight was moved by water or rail, today only very heavy, bulky and/or international freight moves by boat or barge. The use of rail for transport of goods has expanded dramatically over the past few decades with not just bulky and heavy materials being transported in this manner. The advent of containerized freight transport and the use of rail to move loaded trailer bodies long distances has made the movement of goods by rail and truck combined a common practice. Regional facilities to move freight from the train to the truck are located in Syracuse, Binghamton and Albany. Trucks are also now able to traverse North America, including crossing international borders relatively seamlessly.

All of the major regional and national freight carriers serve Chenango County including A Duie Pyle, Estes Express Lines, Con-Way Central Express, Old Dominion Freight Services, Western Express, J. B Hunt and many others. B&G Truck Lines, a local hauler in Greene, provides local services in Chenango County, but predominantly serves The Raymond Corporation in Greene. For smaller shipments, FedEx and UPS have increased their services in the area and are taking larger shipments than they historically did.

Rail Service

As of the final draft of this plan, the north-south rail line through Chenango County previously operated by the New York Susquehanna and Western Railway (which formerly operated a short line between Binghamton and Utica), was out of service. The line was severely damaged by severe weather events in 2006, 2007, and again in 2011. Lack of significant traffic and high cost of repair hampered NYSW's ability to make investments in the repairing the line.

The County of Chenango Industrial Development Agency (CCIDA) was successful in attracting NYS Department of Transportation grant funding to conduct repairs to the line in 2011; the grant award was 16% of the original funding request. In 2012, CCIDA utilized this state funding as a portion of the 20% local funding

match required to leverage additional grant investments from the US Dept. of Commerce's Federal Economic Development Administration, and was successful in receiving a \$4.897 million grant award. As of this writing, CCIDA had completed the full scale engineering of the project. The question of assessing title opinion for the entire length of the railroad was raised for a second time, despite being previously settled by the existing 10 year lease-hold interest. The environmental impact of the rail line on surrounding wetlands was under question by the Army Corps of Engineers, but is being addressed by Stone Consulting and is expected to be resolved shortly. Sending out bids for contractors and purchase of materials had been curtailed as a result. This may be problematic given the limited supply of materials in the market, but it is still expected that construction will begin in the spring.

If the line can be revitalized, links will be provided to CSX Transportation in Syracuse and Norfolk southern to the south in Binghamton. NYSW can then continue providing service through NS trackage rights to North Bergen, New Jersey. the Canadian Pacific Railway in Binghamton; and Norfolk Southern in Binghamton and Passaic Junction, New Jersey.

The only functioning rail service (in the County) at this time is in the southeastern portion of Chenango County in Bainbridge and Afton, provided by Canadian Pacific Railway. Trains regularly pass through these communities en-route between Binghamton and Albany.

Air Service

Lieutenant Warren Eaton Airport

Lieutenant Warren Eaton Airport is located on NYS Route 12 in North Norwich, and is owned by Chenango County. It consists of two asphalt runways, two 10,000 gallon fuel tanks, eighteen T-hangers (16 leased to private owners), including a new six bay hangar. Although it serves mostly a light aircraft clientele, it does offer numerous local benefits. Aviation activities include significant business, recreational flying, aerial inspections, police/law enforcement, aerial photography and surveying, career training and education, search and rescue, emergency medical evacuation, medical shipments, patient transfer, environmental patrol, forest firefighting, and traffic/news reporting. One of the hangers is rented by Plane Leather Repair, a company specializing in interior aircraft repair. Major local corporations like NBT and Agro Pharma also use the airport. While there are no regularly scheduled commercial flights, general charter service is available. The airport also hosts Airport Day, which is an annual event promoting aviation to youth within the community.

There are currently future plans to widen the runways (currently 4724' x 75'), and removal of obstructions. 750 flights on average go through the airport every year.

Greater Binghamton Airport

The Greater Binghamton Airport is located in the Village of Johnson City in Broome County, eight miles north of Binghamton and approximately 40 miles Southwest of Norwich. The Broome County Department of Aviation owns and operates the airport. The Greater Binghamton Airport meets the needs of surrounding communities located in New York's Southern Tier and in Northern Pennsylvania.

The Greater Binghamton Airport offers multiple services and airlines. Benefits of using the facility include the Airport's congestion-free terminal and runways, easy accessibility, state of the art passenger services, and strong air services. The Airport hosts an annual Greater Binghamton Air Show. The following major airlines serve the Greater Binghamton Airport: Delta, Northwest, United Express, and US Airways.

The Ithaca Tompkins Regional Airport

The Ithaca Tompkins regional Airport (ITH) has been operated since 1956 by Tompkins County and is a division of the Department of Public Works. In recent years, the Ithaca Tompkins Regional Airport has grown to offer a wider variety of connecting flights through Delta, US Airways, and United. The airport has a Fixed Base Operator, Taughannock Aviation Corporation, which provides fuel, hangar space, and maintenance for private aircraft, charters and rentals, and essential ground services.

The Syracuse Hancock International Airport

The Syracuse Hancock International Airport is located approximately 60 miles from Norwich, and is approximately an hour and a half drive at Exit 27 on Interstate 81. The Syracuse Regional Airport Authority, a public authority of the State of New York, maintains and operates the facility. The airport has recently undergone many new investments and projects to better service airline passengers and ensure long-term sustainability of the airport infrastructure.

A major regional airport, it is served by the following major carriers: Air Canada, Allegiant, American Airlines, Delta, JetBlue, United, and U.S. Airways. Other airlines that operate at the Airport include Comair (a Delta affiliate), CommutAir (a Continental affiliate), Allegheny, Mesa, Trans States, Colgan Air, Piedmont, Chautauqua, and Shuttle America (affiliates of USAirways).

Syracuse also has a 100,000 square foot air cargo building which services cargo companies Federal Express, UPS, and Wiggins Airways. The Syracuse Hancock International Airport is also the port which services the Foreign-Trade Zone #285 based in Chenango County, which is discussed in more detail later.

Mass Transit

First Transit, Inc. provides services on regular routes throughout the County. The regular routes are all based out of Norwich and return except for one Norwich run that has a schedule through the City of Norwich.

Routes run to Bainbridge, South Otselic, New Berlin, Sherburne, Earlville and Greene. Fares are \$1 (children under 5 are free; 50 cents for seniors and/or disabled), and monthly passes are just \$30.

Education & Workforce Development Resources

Public and Private Primary and Secondary Schools

Chenango County has a number of public school districts, the majority of which cross County lines. DeRuyter Central School District serves students in Cortland and Madison Counties and a few students from the extreme northwest corner of Chenango County. The Georgetown-South Otselic District stretches across the Madison / Chenango County line, as does the Sherburne-Earlville District and a small portion of the Unadilla Valley District which also serves students from Otsego County, as does Gilbertsville-Mt. Upton.

The Sidney district primarily serves students from Delaware County, but also extends into Chenango County. The Afton School District extends into Broome County as does a small portion of Greene School District and the Harpursville District extends into Chenango County as does Cincinnatus. The Norwich City School District and the Oxford District are the only systems located wholly within Chenango County.

The County houses four private schools, two of which are in Norwich. Holy Family is a Roman Catholic elementary school, while Valley Heights Christian Academy is a Baptist school that offers prekindergarten to 12th grade education. There is a small Baptist ungraded kindergarten to 12th grade school, Holmesville Christian Academy, in South New Berlin. Enrollment figures for each of these schools is maintained on the County Chamber of Commerce website.

The fourth private school is a preparatory school, the Milford Academy. Founded in 1906 in Milford, Connecticut, the school ran into financial difficulty in 2002 and sold its buildings in Milford to cover debt. The Academy relocated to New Berlin in 2003, moving to an existing vacant school building. According to Milford Academy, the original purpose and mission of Milford Academy was to prepare students for entrance to Yale University. The school's present focus is to provide a quality education to student athletes who require additional educational guidance before beginning their postsecondary educations. Often from minority working class backgrounds, many of these students are gifted athletes whose only opportunity for a college education comes through their ability to attain four-year athletic scholarships to major universities. Milford Academy provides a structured institution with published boarding school regulations, discipline, small classes, and individual student attention. The school prides itself on its successful track record – 98% of its students have gone on to college in the past two years and 2/3 of these graduates have been full scholarship recipients.

New York State Public School System

For high school education, New York State public schools have matched their requirements to those identified by the Board of Regents. The program identified by the Board of Regents attempts to assure that all students attain a certain level of education before being granted a high school degree. In New York State, the graduating class of 2000, was the first class to have a regents requirement. This all-Regents program has been controversial, largely due to testing errors, and other identified inequities.

Currently, the State has different standards for issuing a local diploma versus a Regents diploma, with Regents students needing to pass a certain number of Regents exams at specified levels, in order to qualify for graduation. Since 2008, all graduating high school seniors have been required to meet one standard, and that standard is attainment of a score of 65 and above on 5 required Regents exams. For a Regents Diploma with Advanced Designation Requirements, students must attain a score of 65 and above on 8 required Regents exams.

From the perspective of business development, there are several reasons to examine an area's public school education. Most employers need workers to exhibit basic problem solving skills, communication skills to transfer problem solutions, mathematical understanding for complex machinery operation (problem solving) as well as for business and personal budgeting. Unfortunately, the current program requirements instituted by the Board of Regents do not necessarily address each of these skills. In order to meet the education requirements in the allocated nine-month, half-day time period, there is little room for incorporating alternative course offerings that might better address community needs.

Many employers are also concerned about worker attitude. Once a parent responsibility, more and more employers now look to schools to provide a moral education particularly as it relates to responsibility. These traits encompass showing up for work, showing up on time, performing the work being paid for, being honest, and

conveying a positive attitude. Although student attitude is a concern to educators as well, teachers and administrators are so busy in their efforts to meet the State program requirements, that attitudinal concerns often must take a back seat.

BOCES

Chenango County has several institutions whose established role is to provide career-focused, skill-based education. The Delaware-Chenango-Madison-Otsego Board of Cooperative Educational Services (DCMO-BOCES) operates at the school district level.

BOCES provides adult and continuing education, and career and technical education. Their Business and Industry Program targets employers and employees alike with job-specific, technical, managerial, and supervisory skills training. They offer training in Industrial and Machinist Mathematics, Engineering and Assembly Drawing Interpretation, Computer Numeric Control (CNC), Programming, Welding, Basic Electronics, and Precision Measurement, as well as other more job-specific skills. They provide many of these services through the Customized Approach to Training and Employee Retraining (CATER) program. Many of the County's larger companies have used these programs, including Raymond Corporation, Unison Industries, Baillie Lumber, and Norwich Aero Products, among many others (to train employees).

BOCES has an innovative four-week intensive program called the Leading Edge. This course includes classes on Self-Awareness, Job Skills, Basic Skills, Job Applications/Resumes, Job Search, Goals, Health and Well-Being, and Home Management. It can be augmented with work experience and other enrichment opportunities. It is oriented towards individuals entering the job market for the first time, transitioning back into the job market, interested in changing jobs, or moving into a more challenging position with their current employer. Through its courses, BOCES attempts to cover the attitude problems the public schools are unable to address within the parameters set by the Board of Regents.

Opportunities for Chenango

A County-based community action agency, Opportunities for Chenango, Inc. (OFC), runs many family focused programs, and also plays an important and pragmatic role in employment and workforce development. Since 1996, OFC has operated a facility called "Back on the Rack II". This facility provides quality used clothing and household items for sale to the general public. OFC also trains individuals in retail skills through this project, a significant benefit for the County, as retail employees continue to be in strong demand.

Catholic Charities—Roots and Wings

The name symbolizes the goal of the program, first to provide individuals with the basic necessities to survive while providing them with a pathway to succeed in today's world.

Roots and Wings operates a food pantry and used goods store onsite which provides their workers with training in retail and warehousing while providing their customers with food, clothing, and household goods. They also provide space for organizations such as Literacy Volunteers to work with individuals and families who need help.

Chenango-Delaware-Otsego Workforce Investment Board

The Chenango-Delaware-Otsego Workforce Investment Board (WIB) is one of many WIBs across the country. A result of federal legislation, WIBs are supported by State received Community Development Block Grants. Recipient states then distribute the allocated funds to local WIB programs based on specific formulas and some discretion.

The Chenango-Delaware-Otsego Workforce Investment Board is very active, and like OFC, has numerous partners in its efforts to support workforce development in Chenango County. As a result of recent federal changes in the Workforce Investment Act, all federal agencies with training program components are now brought under local WIBs for general oversight. Additionally, this most recent Act changed composition of the boards. While a major change for WIBs, the reconfiguration has served as an excellent coordinative tool for workforce training and efficiency of federal funding oriented towards training.

One of the major functions WIBs perform is to staff and operate County “One-Stop Career Centers.” The Chenango County center is located in Norwich. These centers provide assistance to clients in identifying their individual skills, as well as in developing resumes and cover letters. They operate a job bank and provide clients with assistance on education, such as providing information on financial aid as well as on local educational resources.

Morrisville State College

Chenango County is fortunate to have a branch of Morrisville State College located in Norwich. Morrisville State College offers 15 bachelor degrees in various fields, through day and evening classes as well as distance learning via the Internet. Due to increasing continuing education enrollment, the school recently embarked on the construction of a new \$8.4 million facility. The 35,000 square-foot, two-story structure was completed in 2005 and has room to allow the school to expand its curriculum and enrollment. Considered to be one of the most technologically advanced colleges in the nation, Morrisville State College provides wireless internet access to incoming students.

In addition to the degree programs listed below, the Norwich campus also offers the first year of an associate degree program in Nursing in conjunction with the Morrisville campus.

- Accounting
- Business Administration
- Computer Information Systems
- Computer Systems Technology
- Individual Studies
- Liberal Arts and Sciences: Humanities
- Liberal Arts and Sciences: Social Science
- Office Technology

SUNY Morrisville in Norwich

The College is very oriented towards offering degree programs that are specific to the needs of local business and industry. In addition, the College often plays a significant role in local economic development, such as through its support of manufacturing experiments.

The College offers a number of agricultural educational programs, including Agricultural Business, Horticul-

ture, Agricultural Science, and Natural Resources Conservation, all of which are available at the Norwich Campus.

Other Colleges and Universities

In addition to Morrisville State College, a number of excellent colleges and universities are within about an hour drive of the County. Those include:

- Colgate University
- Hartwick College
- SUNY Oneonta
- Cazenovia College
- Hamilton College
- SUNY Delhi College
- Binghamton University
- Cornell University
- SUNY Upstate Medical University
- Syracuse University
- LeMoyne
- SUNY Broome

Major Tourism Resources in Chenango County

Although Chenango County is a rural community it offers a number of unique attractions that are visited by residents and tourists each year.

Museums

Chenango County’s four major museums are all located in the City of Norwich. Various other museums are located in the County’s smaller villages, most of which are open only on limited hours and focus on the local, Native American and settler history of a particular town or village.

Northeast Classic Car Museum

The most recent addition to the County’s museums is the Northeast Classic Car Museum. Cooperation between area governments, charitable foundations, corporations, and individuals like George Staley made the Northeast Classic Car Museum possible. The Northeast Classic Car Museum has four buildings housing numerous exhibits and more than 160 cars on display. In February 1998, the museum earned their own charter and tax exempt 501(c) 3 non-profit status.

Bullthistle Model Railroad Society

The Bullthistle Model Railroad Society, Inc. is dedicated to preserving Chenango County’s railroad heritage. Through educational exhibits and models, the museum’s intention is to generate interest in the railroad’s influence on the history and culture of Chenango County. The Bullthistle Model Railroad Society seeks to inspire Chenango residents and railroad aficionados to participate in museum activities and in the creation of the model trains and exhibits.



Chenango County Historical Society Museum

The Chenango County Historical Society Museum has a wide collection of information on Chenango County history. The museum is located in Norwich in an 1896 former school building, Ward School No. 2. Visitors can research Chenango County history, prominent individuals, businesses, topography and genealogical records. The source material includes primary resources such as historians, family folders, census information, scrapbooks, and reference books. In February 2013, the museum opened the James S. Flanagan Research Center, including expanded storage for Historian's archives, and in 2014 the museum undertook reconstruction of the historic Loomis Barn at their Rexford Street location to create a display focusing on the agricultural history of Chenango County.

Norwich Pharmacal Museum

The Norwich Pharmacal Museum is located at the Chenango County Historical Society Museum. The museum contains artifacts from the company's beginning in 1885 through to 1994. The displays include advertisements, photographs of employees, products manufactured by the company, and manufacturing equipment used in the plant. There is a chronological display of the materials that provide the history and accomplishments of the Norwich Pharmacal Company.

Agriculture Tourism

Agriculture tourism, also known as agritourism, is a technique for communities to utilize their agriculture assets to educate and increase tourism. With its rural, agrarian character, agritourism presents a multitude of opportunities to Chenango County for attracting tourists to the County. Chenango County has recently partnered with neighboring counties to form a regional agritourism collaborative with the brand "CNY Fresh". The CNY Fresh project compiled a directory of farm producers and agritourism properties which are promoted through numerous media outlets (website, print publications, and advertising).

Some examples of local producers highlighted on the CNY Fresh website include: Baker's Maple Products, Bainbridge (maple syrup and granola); Frog Pond Farms, Bainbridge (fruits, vegetables, fun activities for kids); Lilley Farms, Greene (tack & feed, apple cider mill, pumpkin patch, hay rides, and more); Sunrise Family Farms/Evan's Farmhouse, Norwich (local dairy products); Berries Blue, South Otselic (u-pick blueberries) and numerous other county farms, farm stands and farmer's markets.

Black Bear Farm Winery

One unique tourism property, the Black Bear Farm Winery, opened in 2002, and is located in the Town of Greene at the southwest corner of Chenango County (approximately 15 miles north of Binghamton). The wines, made from New York grown fruit, have flavors ranging from apple, to blackberry, to cranberry, to strawberry. Beverages produced at the winery fall under four categories: fruit wines, floral wines using dandelions, hard ciders, and meads (wines fermented using honey).

The Black Bear Farm Winery is open throughout the year for wine tasting and tours. They can provide space for indoor and outdoor events. There are unique gift baskets available and educational opportunities for visitors.



Cultural Resources

Chenango County has many cultural resources located throughout the region. Much more information on these resources is available on the County's tourism website at www.chenangony.org, and in publications produced by Commerce Chenango. There are 11 theatre/performance spaces and eight theatre/performance groups in Chenango County.

Earlville Opera House

The Earlville Opera House Multi-Arts Center is located in the Town of Earlville, on the border of Chenango and Madison Counties. The historic building houses a theater, two art galleries, a café, and a gift shop. Performances held at the Earlville Opera House are diverse and include jazz, country, musical theater, and often feature nationally known performers.

The Chenango Arts Council

The Chenango Arts Council, located in the City of Norwich, supports and encourages the arts and humanities throughout the County. The Council of the Arts provides a variety of services to the community. In addition presenting a nationally acclaimed series of performances each year the arts center houses a gallery, performance space and a pottery studio. This space is available to host school events, special events, classes and is used for plays and dance performances featuring local performers. The Council of Arts also contributes to the community by administering a variety of grants, including decentralization grants, local capacity grants, grants for teachers, and grants for individual artists.

The Chenango River Theatre

The Chenango River Theatre entered its 8th season in 2014, and is the only theatre in the greater Binghamton area under annual contract with the Actors' Equity Association (AEA). The theatre board is committed to providing a venue in this rural region for high-quality performances, while also providing fair compensation to the professionals who perform on their stage.

Sam and Adele Golden Gallery

The Golden Foundation is a not-for-profit arts organization, dedicated to supporting artists working in paint. This international program awards artists a unique 4-week residency providing 24/7 access to studio and living space, technical support services and the opportunity to explore and experiment with the latest in paint technology (www.goldenfoundation.org).

Special Events

Maintaining a seasonal and year-round schedule of special events and activities, such as festivals, farmers markets, parades, outdoor shows, etc., has become a regular component of tourism programming.

Some of the most notable events and festivals (and approximate attendance figures) include: Gus Macker 3-on-3 Basketball Tournament (11,000); Sherburne Pageant of Bands (18,000); Unadilla Valley Sports Center "Pro National Motocross Weekend" (22,000); the Rolling Antiquers Annual Antique Auto Show & Flea Market (13,000); Colorscape Chenango (14,000); Chenango County Bluesfest & Summer Concert Series (12,000); and the Chenango County Fair (40,000 during the week).

General Clinton Canoe Regatta

The creation of the Canoe Regatta, in Bainbridge, was conceived by a group of local businesspersons, in an effort to foster more tourism in the area. The Canoe Regatta honors and recognizes General James Clinton of the 1779 Revolutionary War and the “Sullivan-Clinton Expedition” down the Susquehanna River. The first race was held in 1963 with 45 entries, with a record of 11 hours and 45 minutes.

In 1972, the Bainbridge Chamber of Commerce purchased a 45-acre parcel land for the creation of park, which is now the official site of the General Clinton Canoe Regatta. There are over 50 races and an estimated 3,000 amateur, professional, and Olympic hopefuls participate at the General Clinton Canoe Regatta. At 70 miles, the course is the single longest day flat-water canoe race in the world. There is a festival held in conjunction with the race with attractions for kids and adults in Bainbridge.

Colorscape Chenango Arts Festival

The annual Colorscape Chenango Arts Festival is held during autumn in the City of Norwich. In 2004, the Festival drew approximately 14,000 visitors. Activities include children’s workshops, artist demonstrations, and concerts and performances and a children’s stage.

The not for profit, Colorscape Chenango Arts Festival, Inc., organizes this annual event. Along with other corporate and private sponsors, the festival is made possible through the Chenango Arts Fund, a decentralization program with the New York State Council on the Arts. Colorscape Chenango Arts Festival, Inc. also participates with Changing Colors, a not for profit organization, which develops partnerships with Upper Catskill fall festivals.

Chenango County Blues Festival

The Chenango Blues Association (C.B.A) is a nonprofit 501(C)3 organization whose mission is to foster an appreciation of uniquely American music forms including blues, jazz, zydeco and gospel. We strive to accomplish this by presenting the highest caliber of artists in diverse settings for the lowest possible cost. This strategy is designed to make the music accessible to as many people as possible.



The major activity of the C.B.A. is a mid-August Blues Festival Weekend held at the Chenango County Fairgrounds. The event draws thousands of people from throughout the country for two days of concerts, workshops, demonstrations and art exhibits. Special attention is given to structuring activities so they are accessible to all members of the community.

The CBA also sponsors a free summer concert series in the parks of downtown Norwich, during which they present different genres of music including Zydeco, Jazz, Bluegrass, and a Big-Band Swing orchestra. The summer concert series and blues festival collectively draw 12,000 visitors over the summer.

Outdoor Activities

Another major tourism driver in Chenango County is the enjoyment of the county’s abundant outdoor activities. Some of these opportunities and assets are outlined in the following paragraphs.

Hunting, Fishing, and Camping

The rural character of Chenango County encourages outdoor recreational activities such as hunting, fishing, and camping. Just over 60% of the County’s land area is forested, and over 80,000 acres of land are open to hunting. The County’s many state forests provide excellent opportunities for deer and turkey hunting, which are both popular in the County.

Residents or visitors can fish at many of the County’s lakes, streams, rivers, and ponds. There are over 115 miles of warm water rivers and 235 miles of trout streams. Fish commonly found in the County include walleyes, northern pike, largemouth bass, rainbow trout, and panfish.

There are many camping opportunities throughout Chenango County, often in lands adjacent to State parks, ponds, and rivers. Many of the State and local parks provide hiking tours, walking tours, and car tours for various attractions. Canoeing and swimming are popular at many of the County’s water bodies.

New York State Lands

Chenango County houses 37 designated areas managed by the New York State Department of Environmental Conservation (NYSDEC). These areas include 31 State forests, two State parks, one State campground, one State tower site, one State education center, and one State management area. Many of these State managed areas provide year-round activities for all ages. An asset, these facilities result in local State employment opportunities, preserves open land through State ownership, and provide opportunities to pursue recreation-based tourism.

Table 12: NYSDEC Managed State Lands

FORESTS

Ambler State Forest
 Balsam Swamp State Forest
 Basswood State Forest
 Beaver Meadow State Forest
 Bobell Hill State Forest
 Bowman Creek State Forest
 Bucks Brook State Forest
 Bumps Creek State Forest
 Coventry State Forest
 Five Streams State Forest
 Geneganslet State Forest
 Hunts Pond State Forest
 Lincklaen State Forest
 Long Pond State Forest
 Ludlow Creek State Forest
 Lyon Brook State Forest
 Mariposa State Forest
 McDonough State Forest
 Melondy Hill State Forest
 New Michigan State Forest
 Oak Ridge State Forest

FORESTS CONTINUED...

Otselic State Forest
 Perkins Pond State Forest
 Pigeon Hill State Forest
 Pine Ridge State Forest
 Pitcher Springs State Forest
 Red Brook State Forest
 Skinner Hill State Forest
 South Hill State Forest
 Whaupanaucou State Forest
 Willey Brook State Forest

PARKS

Bowman Lake State Park
 Oquaga Creek State Park

TOWER SITE

Berry Hill Fire Tower Site

CAMPSITE

Hunts Pond State Campground
 (closed)

WILDLIFE MANAGEMENT AREA

Pharsalia State Wildlife Management Area

Rogers Environmental Education Center

Rogers Environmental Education Center, located in Sherburne, is about one mile west from intersection NYS Routes 80 and 12. The 571-acre Rogers Center offers a variety of habitats, activities, and classes. Diverse trails passing through woodlands, wetlands, plantations, meadows, and farmland, offer opportunities to satisfy the preferences of every visiting hiker, bird watcher, photographer, cross-country skier, or snowshoer. The Center offers group programs for schools, youth groups, and special interest groups interested in nature and environmental projects.

The Rogers Environmental Education Center holds the Winter Living Celebration every January. This special event includes many winter activities and attractions. Roger's Center is now managed by Friends of Rogers, Inc., a non-profit 501(c)3 organization that fought to retain the center when New York State closed it in a round of budget cuts in the late 2000's.

Bowman Lake State Park

The 660-acre Bowman Lake State Park is located in Oxford. The park houses more than 100 bird species and a trout-stocked lake. The park provides self-guiding brochures for its eight miles of designated nature trails, many of which encircle around the lake. During the winter months, the park is open for both snowmobiling and cross-country skiing.

Gaius M. Cook Memorial Park

This County of Chenango managed property is located in Greene, and includes forty camp sites for tents, campers, and RV's. The park is located near Greene Pond, which offers fishing and boating, and features a picnic area as well as a pavilion. Cook Park is conveniently located one mile east of the Town of Greene, in southern Chenango County.

Mill Brook Recreation Park

The Town of New Berlin owns this park located on the Mill Brook Reservoir. The Town manages a non-profit beach facility, and recently opened campgrounds which are available for public rental. Mill Brook Park is open year round, and available for such activities as swimming, fishing, hiking, camping, and cross country skiing.

Snowmobile Trails

Chenango has a group of eight active snowmobile clubs operating a formidable fleet of groomers to keep the 300 miles of funded trails up to par. Clubs focus on safety, new-rider training, and carefully designed signage systems. With 112,000 acres of state land, the average snowmobiler spends 14.68 days engaged in the activity. Expenditures includes; club dues/fees and donations, insurance, trailer expenses, maintenance/parts and supplies for both trailer and sled, gas, clothing and accessories, meals and sometimes overnight stays. Commerce Chenango continues to promote snowmobiling in the winter months by distributing free snowmobile maps and advertising in a variety of snowmobile publications.

State Forests & Lands

Regions outside of the Adirondack and the Catskill regions own their State forests to the early pioneer settlement and farming efforts met with little success. The State Reforestation Law of 1929 and the Hewitt Amendment of 1931 authorized the State to acquire land for reforestation. In 1930, Forest Districts were created and in 1933 the Civilian Conservation Corps (CCC) were assigned to planting new trees. The CCC also built trails and roads, watershed restoration, and forest protection. Today, the State of New York lands cover nearly 700,000 acres. The table below denotes forests, parks, and other lands managed by the NYS DEC.

Energy Resources

Power

New York State Electric & Gas (NYSEG) is the primary electric and gas utility in Chenango County. NYSEG's website (www.nyseg.com) provides substantial information on their services and rates for various power uses. Information on Electricity and Natural gas, including Electricity Pricing & Tariffs and an Electric Service Schedule is posted on this website.

NYSEG has a number of economic development related programs, including:

- Brownfield/Building Redevelopment
- Utility Infrastructure Investment
- Capital Investment Incentive
- Agricultural Capital Incentive
- Business Energy Efficiency Assistance
- Economic Development Outreach
- Gas Infrastructure Investment
- Power Quality/Reliability

Natural Gas

The only commercial gas supply in the County is provided by New York State Electric & Gas (NYSEG), which maintains current rate information on its website. The NYSEG pipeline system, constructed in the early 1960s runs from DeRuyter, NY to Oneonta, NY. In Chenango County the service is limited to the hamlets of Plymouth and South New Berlin, the Village of Oxford, the City and portions of the town of Norwich and the Norwich Pharmaceutical plant in North Norwich.

The expansion of the availability natural gas in the county should be promoted for use by both homeowners and businesses. At least two manufacturers in the county have expressed a need for natural gas to support their manufacturing activities.

Natural Gas Development: High Volume Hydraulic Fracturing & Chenango County

The use of High Volume Hydraulic Fracturing to release natural gas and oil from tight shale formations throughout the United States has radically altered energy picture in the nation. Natural gas is now the fuel of choice for power generation, home and industrial heating needs and may in the near future be replace gasoline and diesel fuel to power cars, trucks and trains.

The State of New York has recognized the need to expand both the use of natural gas and expand the delivery system in the State.

There are 2 proposals to construct either inter or intrastate pipelines through portions of Chenango County. The Constitution Pipelines proposed route will cross through portions of the towns of Afton and Bainbridge and make the delivery of natural gas to those communities likely. The second line, proposed by EmKey Resources will run through portions of Afton, Coventry, Greene, Oxford, Preston, Plymouth and Smyrna. The status of these pipeline projects should be monitored and delivery of gas too communities near the pipelines should be promoted if it is constructed.

New York has also recently promulgated regulations on the transport and storage of LNG in New York. This make it possible to deliver natural gas to businesses and communities that are located far from the pipeline system. At times LNG can be delivered by truck as far as 250 from the point of manufacture to an end user at prices per BTU that are competitive with fuel oil or propane.

The conversion of vehicles to run on natural gas and the expansion of natural gas refueling stations should be supported in the county. It is ironic that there is a natural gas refueling station belonging to the NYS DOT is located along route 12 in Oxford that it is not open to the public.

1. DPS action 12G0297
2. The Raymond Corporation in Greene and Chenango Valley Pet Nutrition in Sherburne

Existing Natural Gas Wells and Gathering Lines

There are currently over 30 natural gas wells in production in Chenango County. These were all drilled by Norse Energy or their successor EmKey Resources between 200 and 2014 and primarily target the Herkimer Sandstone. There is also a gathering system for the gas that extends from the Town of Preston through Plymouth and Smyrna to a compressor located just outside of Eaton in Madison County where the gas is compressed for delivery to the interstate pipeline owned by Dominion Energy through a connection at Morrisville, NY.

Further development of these sandstone resources may resume in the future based on the economic climate. If drilling were to restart the successful program Commerce Chenango and the Planning Department developed to maximize the opportunities for local businesses should be continued. The gathering line system may also provide the opportunity to supply natural gas to local consumers with the residents of Smyrna and Sherburne being the most likely to receive gas from these local wells. There may also be opportunities for industrial customers to locate a facility along the gathering line system and have a gas supply that is free of the tariffs associated with the intra and interstate system.

Telephone, Cable and Internet Services

Frontier is the primary telephone service provider in Chenango County. Using the latest fiber optic technology, Frontier offers phone service, high-speed Internet access, and DISH Network Satellite TV service.

Cellular service is available through AT&T and Verizon, and several prepaid cellular options exist for consumers which utilize AT&T and Verizon's towers. Once connected through phone lines, there are a multitude of Internet access providers. High speed internet service is also available from cable companies serving the County, including Time-Warner.

Existing Water, Sewer, and Solid Waste Infrastructure

The Chenango County Profile 2003, developed and published by the Southern Tier East Regional Planning Development Board, has a detailed inventory of Chenango County's infrastructure, including capacities and rates for water and sewer services. Although not detailed, this section attempts to provide an interim update on the County's infrastructure.

Water

Of Chenango County's seventeen public water supplies, five are water districts. The Villages of Afton, Bainbridge, Greene, Guilford, New Berlin, Oxford, Sherburne, and Smyrna each have municipal water systems. The City of Norwich also has its own municipal system. Of the remaining districts, Greene houses three, the Town of Norwich has two, and Guilford, Mt. Upton, South New Berlin, and South Otselic each have one.

According to recent discussions with the staff of the Chenango County Department of Health, there has been little change in flow rates or usage since the information was compiled for the 2003 County Profile. Bainbridge has substantial additional capacity, as does the City of Norwich and the Villages of Smyrna, Sherburne, Oxford, New Berlin and Greene. In general, each water system has storage facilities, which are more than adequate compared to daily consumptions. The City of Norwich has the most technically advanced treatment system in place.

Sewer

Chenango County has six public waste discharge and sewage treatment facilities. They are located in the City of Norwich, and the Villages of Bainbridge, Greene, Oxford, Sherburne, and Smyrna. Although there are other systems in the County, none of these are available for public use.

As of 2002, there were eight private systems serving one or more companies that were beyond the economic reach of a municipal system, and/or had special needs. Some of these systems may have closed since 2002, but as they are not available for public use, their impact on new development would be minimal.

Solid Waste

Chenango County is responsible for the landfilling of solid waste in the County. To fill this role, the County owns and maintains a new, state-of-the-art landfill in Pharsalia, in the northwest corner of the county; two transfer stations (in Brisben and in North Norwich). In addition, the County also maintains an active recycling program.

Communities in Need

New Berlin, New York has been identified as one small municipality in which new economic development opportunities are being severely hampered by the inability of the municipality to offer sanitary sewer services. Due to the high cost of installing independent septic systems capable of treating large volumes of waste—particularly restaurant related waste—at least one small business expansion has been unable to move forward since 2011.

In 2013, the Village of New Berlin received a grant for planning a commercial district system, and has also examined residential delivery in the past (this has been unpopular due to the high cost of residential hook-ups and the potential increase in annual water/service fees on most households).

Issues such as the one described above can literally become a road block to new development in rural small towns, and must be tackled as a long-term community issue.

Commercial Real Estate Inventory

Since adoption of the 2006 Economic Development Strategic Plan, the County (through its economic development agencies) has worked on achieving the goal of property database maintenance. Economic developers maintain information about available sites, and seek realtor listings for new commercial properties regularly.

While the County does not currently boast “shovel-ready” industrial space or land, it does work with businesses to facilitate occupancy, helping them find appropriate space. There remains a need for developing a system of cooperation between local economic development agencies and local realtors. As realtors’ salary comes largely from commissions, they have concerns with working with area economic developers and providing full property listing information. Despite efforts to alleviate this issue in the late 2000’s, the perception remains and these issues prevent the sharing of accurate, complete commercial property information.

Economic development staff has provided a snapshot of Chenango County’s available commercial, mixed use, and industrial properties for this Plan. It should be noted that available real estate is a constantly changing resource. To be a successful endeavor undertaken as part of a retention or business attraction strategy, information in a real estate inventory must be updated regularly. While municipal tax assessors are a good resource, professional realtors have the most up-to-date knowledge on formal listings throughout the County. Additionally, realtors often have “informal” listings that property owners do not want public.

To provide the most usefulness to businesses and entrepreneurs looking for sites, formal available property inventories should include detailed information on parcel size, building footprint and height/stories, utility availability, power available (phase), access ease for tractor trailers, rail access, distance to specific exits on I-88 or I-81.

PART 6: INDUSTRY ANALYSIS & ECONOMIC PROFILE

This section includes a detailed discussion of the major components of Chenango County’ local economy and industry sectors. Major components described herein include Manufacturing, Agriculture, Tourism and Services. Small businesses are also discussed, as they make up a major component of the local economy.

Current Major Employers

Table 12 on the next page presents the largest employers in Chenango County. The Raymond Corporation, the largest employer in the County, has experienced significant growth in recent years in response to a rebounding economy. Raymond is also a great supporter of the Greene community, especially with its involvement with schools and providing internships. Chobani, Inc. is the second largest employer in Chenango County, going from 5 employees in 2005 to over 1200 employees as of early 2014. Chobani experienced major growth as the Greek yogurt market exploded and it became the #1 Greek yogurt brand, also for a time enjoying status as the #1 of all yogurt brands. Chobani has seen some retraction in recent years as the market has settled, and the local plant in particular had some pressure taken off of it when Chobani brought a facility in Idaho on line.

NBT Bank, NA has experienced noteworthy growth since the 2006 Strategic Plan. NBT Bank, based in Norwich, NY, has employed a growth strategy over the last several years, acquiring numerous other small banks in the northeast. Rated as one of the best banks in the nation by industry groups, NBT now has a presence in Pennsylvania, New Hampshire, Vermont, and Massachusetts, in addition to numerous New York State markets.

Two health care organizations, Chenango Memorial Hospital in Norwich and the New York State Veteran’s Home in Oxford, are substantial employers in the County, especially when considering the increase of residents over the age 55. The current largest employers in Chenango County have a substantial effect on the community and its residents. Additionally, two long-term care or nursing facilities can also be considered amongst Chenango County’s largest employers—the Doris L. Patrick Retirement Facility and the Chase Memorial Nursing Home.

Table 12: Largest Employers in Chenango County (over 100 employees)

| Employer | Location | Product/Service | Employees |
|----------------------------------|-----------------------|----------------------------|-----------|
| The Raymond Corp. | Greene | Forklift Manufacturer | 1500+ |
| Chobani, Inc. | Columbus/Norwich | Greek Yogurt Products | 1250+ |
| Chenango County Govt | Various | Government services | 700+ |
| NBT Bank, NA | Norwich | Financial | 546 |
| Norwich Pharmaceuticals, Inc. | North Norwich | Pharmaceutical | 398 |
| Chenango Memorial Hospital | Norwich | Health care/long term care | 395 |
| DCMO BOCES | North Norwich | Education | 375 |
| Frontier Communications | Sherburne/County-wide | Telecommunications | 350 |
| Sherburne-Earlville Schools | Sherburne | Education | 350 |
| Unison Industries | Norwich | Aerospace manufacturer | 345 |
| Norwich City School District | Norwich | Education | 338 |
| NYS Veterans Home | Oxford | Health Care/Senior Living | 300 |
| Preferred Mutual Insurance Co. | New Berlin | Insurance | 262 |
| Valley Ridge CIT | Norwich | Developmental Facility | 240 |
| CWS | Norwich | Assembly | 225 |
| Greene Central Schools | Greene | Public school district | 219 |
| Unadilla Valley Central School | New Berlin | Public school district | 189 |
| Valley Ridge CIT | Norwich | Mental health/rehab | 170 |
| Bainbridge Guilford Schools | Bainbridge | Public school district | 165 |
| Oxford Academy Central School | Oxford | Public school district | 157 |
| Doris L. Patrick Retirement Fac. | Norwich | Long term care nursing | 150 |
| Blue Ox Corporation | Oxford | Energy/convenience stores | 150 |
| Sidney Federal Credit Union | Multiple locations | Financial | 149 |
| Golden Artist Colors | New Berlin | Paint manufacturer | 148 |
| Wal-Mart | Norwich | Retail | 145 |
| Price Chopper | Norwich | Retail/grocery | 142 |
| Mang Insurance Agency | Norwich | Insurance | 140 |
| Opportunities for Chenango | Multiple locations | Human services/housing | 130 |
| Snyder Communications | Norwich | Media | 127 |
| Norwich YMCA | Norwich | Community organization | 114 |
| Kerry Bio-science | Norwich | Pharmaceutical/food ing. | 112 |
| Chase Memorial Nursing Home | New Berlin | Long term care nursing | 110 |
| Lowe's | Norwich | Retail | 105 |

Source: Commerce Chenango, February 2014

Manufacturing

Chenango County has experienced a substantial decline in manufacturing employment in the last 20 years. Average annual employment in Manufacturing dropped almost 15% from 1990 to 2000, from 4,836 positions to 4,128, or a drop of 708 persons. Between 2000 and 2003, the County's manufacturing employment was estimated to have further declined by 19.2%.

Similar to National trends, Chenango County experienced a substantial decline in manufacturing employment during the 1980's and 1990's. Despite many recent expansions and new investments by some of Chenango County's largest manufacturing sector employers—and the addition of Chobani to this industry category—manufacturing continued to decline from 2000 to 2010, from 4,900 positions in 2000 (at 21% of the employed population) to 4,130 in 2010, or 18.5% of the employed population.

Chenango County's array of industrial support firms may be the closest thing it has to a true economic industrial cluster. The County houses a strong base of industrial support firms, primarily in Norwich, Greene, and Sherburne. It is also worth noting the strength of the commercial printing and packaging industry in Chenango. From 2009-2012 Chenango County saw a large increase in employment at several area manufacturers, most notably The Raymond Corporation in Greene, Chobani, Inc. in Columbus, Golden Artist Colors in Columbus, Unison Industries in Norwich, and Norwich Pharmaceuticals in North Norwich. In early 2014, Norwich Pharmaceuticals changed its name to Norwich Pharma Services, to better highlight the industry category it performs work in.

It was noted by Regional Labor Economist Christian Harris in 2012 that Chenango County was one of few "highlights" in the regional economy, led by the surge in growth by local yogurt manufacturer Chobani, the nation's leading brand.

While 2013 yielded continued growth for Chenango County at numerous manufacturers, including The Raymond Corporation and Chobani, prior to year end some shifts in Chobani's production schedule at their Columbus facility resulted in layoffs. Early 2014 brought the first full facility closure announcement since Proctor & Gamble left the community, with Esterline, the parent company of Norwich Aero, announcing that they were closing their Norwich facility to consolidate their operations to Mexico—despite the fantastic performance of the facility and its employees.

Closures and Downsizing Trends

In the last three decades, trends in manufacturing, such as relocating production overseas and corporate mergers and downsizing, have greatly impacted the County's manufacturing firms. Yet Chenango County can still boast a high percentage of employment from manufacturing and related industries.

Beginning in the late 1980s and through the 2000s, a number of plants closed or effected lay-offs. The County has a diverse mix of manufacturers in place and downsizing appears to have been dispersed across the industrial sectors.

- 1988 - Sherwood Medical relocated to Mexico (600 jobs lost)
- 1991 - Norwich Shoe Company closed (300 jobs lost)
- 1992 - Proctor & Gamble underwent a corporate restructuring (100 jobs, including 40 management positions lost)
- 1992/93 - Simmonds Precision (now Unison) layoff (200 jobs lost)

- 1992 - Victory Markets closed (500 jobs lost)
- 1992 - Tracy Bakery closed (45 jobs lost)
- 2003-04 - Champion (100 jobs lost)
- 2004 - Kraft plant closure (67 jobs lost)
- 2005-6 - Elmer's facility closure (10 jobs lost)
- 2007- 2009 Procter & Gamble (now Norwich Pharma) (198 jobs lost)
- 2007 - Apple Converting Facility closed (50 jobs lost/moved to Otsego Co.)
- 2008 - Rea-D-Pack sauerkraut plant closed (13 jobs lost)
- 2008 - Productive Plastics closed (22 jobs lost)
- 2008-2012 Lok-N-Logs | Webb & Sons (from 125 employees in 2005 to 5 employees today)
- 2014 Norwich Aero (120 jobs projected — announced for 2015 closure)

Recent Development and Expansion Trends

Raymond Corporation, the County's largest manufacturing employer, has manufactured forklifts at its Village of Greene location for the past 60 years. The Raymond Corporation's business is heavily dependent upon the economic conditions of the day; meaning that when there is a recession, the Raymond workforce may be reduced to respond to economic conditions. Similarly, The Raymond Corporation may experience drastic increases in demand when the economy improves. Hence, in the late 90's Raymond's employment level was at the lowest level observed in many years—at 700+ employees. In the period from 2009-2014, Raymond had doubled its number of employees to over 1600 people, and made significant investments in its Greene facility. In 2009, Raymond embarked on a project to consolidate warehouse operations, acquiring the "G2 Warehouse" on Route 12 South of Greene. The company's main site is land-locked, and they are hard pressed to locate room for ample parking space and plant expansion .

While the 2006 plan was being developed, Agro Farma, Inc., a yogurt manufacturer, purchased the former Kraft facility in New Berlin. The facility was scheduled to restart production under the new owners early that year, with a projection of creating 60 jobs over the following three years. Initially, Agro-Farma, Inc. produced private label yogurt for a third party. In 2007, they launched the brand "Chobani", which evolved to become the nation's leading brand of yogurt in all categories in late 2012. The company grew from 5 people to over 1200 people working in Chenango County. In 2010, Chobani purchased the former Procter & Gamble facility in Norwich, NY, and moved their corporate headquarters there. The company has expanded its market internationally, with a presence in Australia and Europe, and added a manufacturing facility in Idaho, which came on line in 2012. As the company continues to adjust to market conditions and with the increased manufacturing capacity in Idaho, the Chenango County facilities has undergone some changes in executive management and operations.

Chenango County is the home of numerous small manufacturers producing a wide range of goods. For better clarity in this plan they are broken down into two broad categories, those that produce products that are sold to other manufacturers and those who produce finished goods that do not require any additional processing.

The first category would include businesses like machine and fabrication shops (Strenkert Machine, Empire Machine and Tool, Little Boys Shop, etc.), custom electronic component manufacturers (Custom Printed Circuits, GC Controls), industrial painters, injection molders (Prime Tool and Die, CV Technologies), primary metal fabricators (Technofil), braided cord and rope (Glading), and printers (MidYork Press) who produce packaging materials. These companies produce goods for a range of industries and sell products both locally, nationally, and internationally.

The second category includes manufacturers who produce products such as commercial cabinets (T-Squared,

Commercial Display and Design, Genbrook Millwork), paper folding and collating machinery (Automecha), pet foods (CV Pet Nutrition), and trailers (Cross Country Manufacturing, Cobra Industries).

There are a number of concerns regarding small businesses like these in Chenango County including their potential lack of capital to expand, the small customer base that many of them rely on and the lack of succession planning that is common to small closely held firms.

Golden Artist Colors, Inc., a Columbus-based company, uses domestic resins to manufacture gel acrylic artist paint and produces oil paints under the Williamsburg brand name which the company acquired in 2009 . The firm, with international customers in 59 countries, employs 155 people. The company expanded its Columbus facility in the mid-2000's to create additional manufacturing space, warehouse space, office space and improved Gallery space. This was the fifth major expansion for the 23-year-old firm. On the firm's website, www.goldenpaints.com, the company discusses new products, new colors, artist programs and has links too "unique, independent art supply stores." In 2013, the company acquired the former Apple Converting facility in Norwich, a long-vacant 45,000 square foot facility which was then outfitted for warehousing and distribution—freeing up additional space for expansion at the Columbus plant.

Unison Industries traces its roots to General Laboratories Associates which was founded in Norwich in the early 1960's and was acquired by GE Engine Services, Inc. in April 2002. The company employs just over 340 workers in their 160,000 square foot facility. The firm specializes in the design and manufacture of small electrical motors and generators, electrical and mechanical components, sensors, and systems for aircraft, industrial, marine, and space applications. Components built by the company are placed on European and American aircraft, as well as used in some space exploration applications. The Norwich facility is considered to be a world class competitor in its market .

Norwich Pharmaceuticals, an Alvogen Company, was founded in 1887 as Eaton Labs. The company is based in Norwich and provides comprehensive manufacturing and packaging support to the pharmaceutical industry. Providing assistance to firms in a variety of sales capacities, from running clinical trials through the commercial launch of a product. The firm's capabilities include production, packaging, and distribution of solid dose, semi-solid, and liquid over-the-counter and prescription pharmaceutical products. The company has undergone several ownership transitions in the past decade, but recent investment trends show a commitment to long-term expansion at the North Norwich facility.

Agriculture

Historically, farming and agricultural production have been profitable businesses in Chenango County, despite occasional inclement weather and other challenges. Chenango County is ranked 10th in the State for dairy farming. Their primary forage crops grown are corn silage and hay/haylage. Many small dairy farms implement rotational grazing practices, a model that allows smaller farms to be more profitable. Agriculture is one of the most dominant industries and land uses in Chenango County.

Dairy farming in particular has historically been a low margin business. Milk pricing is determined on the Federal level, and cost inputs are market driven. The increase in demand for locally produced, RBST free milk from New York State manufacturers such as Chobani, Inc. have created new opportunities for dairy farmers, however translating that additional demand into profits is both an opportunity and a challenge for Chenango County farmers.

The plan will also touch on the increasing importance of other types of farming in Chenango County, including livestock farming, vegetable, fruit, and berry farming, and the increased production of value added products such as maple syrup, honey, jams and jellies, frozen vegetables, and more. New market opportunities have been

identified by some principle ag producers and marketers, and capitalizing on these new opportunities will be crucial to help expand Chenango County's agricultural businesses.

As with many upstate New York communities that have agriculture as a major element of the local economy, the survival and strength of farming is very important in Chenango County. The County's farmers contribute substantially to the local economy and agriculture's economic multiplier is often higher than other businesses. A report entitled "Economic Multipliers and the New York State Economy," indicates dairy production, for example, enjoys a 2.29 income multiplier compared to 1.66 for construction, 1.48 for services, 1.41 for manufacturing, and 1.40 for retail and wholesale trade. Crops produce a multiplier of 2.28 and nursery and wood products yield 1.78 times sales. Access to capital is a problem confronting many farmers, limiting their ability to invest in new equipment and thus improve profit margins. Recognizing that farms are small businesses and that agriculture is an industry that must be supported, financial resources should be made available to local farmers via business assistance programs. In recent years, some Chenango County economic development organizations, as well as the Agriculture Development Council, have taken steps to increase resources and funding available to farmers, including microgrants and microloans, and more recently, the establishment of a revolving loan fund specifically geared towards the expansion and retention of dairy farms in Chenango County.

Agricultural economic development is similar to general economic development in that it is not an event, but rather a process. It needs continual "fertilizing", and support. Maintaining a strong agricultural economy requires access to capital, development of value-added items, production expansion and diversification, and strategic marketing of the products that are produced.

Although cooperation among the members of the local agricultural community is not well coordinated in Chenango County, there have been some efforts to reach this goal. In 1998, consultants Yellow Woods Associates (YWA) worked with the Agriculture Development Council of Chenango County on a study to assess the feasibility of establishing a milk-based, value-added manufacturing enterprise to support the local dairy industry. Techniques to foster increased profitability including the development of new products and services, new marketing strategies, and in some cases the implementation of better management practices were highlighted in the plan.

Along with agratourism another potential area for growth is direct marketing of produce to local grocers and restaurants. Although this can be a time intensive endeavor the sale of local products can often be advertised with great success by regional grocers, chefs and restaurants.

As a bonus the direct contact with outside re-sellers provides information to farmer, regarding existing products and ideas for new items and potential new markets. Direct sales to restaurants and stores or through aggressive attendance at farmers' markets can lead to substantial improvements to profit margins.

One potential market that is already being explored by Chenango County farmers is the City of New York. According to Cornell Cooperative Extension of Chenango County, New York City imports more than 90% of the food it consumes from outside New York State. Of course, the distance to market would require considerable organization at the local level to consolidate products so that trips to New York City would be profitable. It is also important to consider who acts as the marketer, and if necessary, who acts as salesperson(s) to the New York City market.

Ag Summit V

The County's Ag Development Council planned and facilitated the fifth Ag Summit in Chenango County in the

spring of 2011. The event featured local farmers considered to be "positive deviants", or individuals who broke away from traditional business models to experience success with their farm/products. These individuals, representing livestock, dairy farming and processing, berry farming, and vegetable farming, discussed their challenges with growing, processing, and marketing their products. They explained that their key challenges include skills mismatch/workforce issues, the regulatory environment, access to processing facilities for livestock, transition and succession planning, the lack of a commercial kitchen nearby, access to capital, and accessing new markets.

Patrick Hooker, the Agribusiness Director from Empire State Development, was the keynote speaker for the event. The results of the day full of presentations, discussions, and brainstorming were incorporated into the recommendations to the Ag Development Council and the Ag & Farmland Protection Board's County Ag Plan. The list of key recommendations/ideas from the fifth Ag Summit is attached as Appendix G.

Service

Tourism

The tourism properties and events/festivals offered in Chenango County are both significant economic drivers in this rural County. Numerous museums, cultural opportunities, and historic landmarks offer visitors a unique experience in beautiful upstate New York. The County's Tourism Promotion Agency, Commerce Chenango, invests heavily in promoting the assets of the area to attract guests and ensure that residents of the region are aware of what Chenango County has to offer.

There are multiple websites that promote Chenango's tourism activities. Chenango County is part of the New York State Central New York Region for tourism purposes.

Health Care, Social Assistance, and Education

Health Care Services is a growing employment sector throughout the United States, and jobs in this field continue to grow in Chenango County. Employers in the health care field experience unique recruitment challenges in Chenango County, however, with perceived "quality of life" shortcomings and the lack of high-end housing making recruitment of medical professionals difficult. Finding enough skilled nursing staff is also an issue. Social assistance programs and organizations, as well as educational institutions, also provide substantial employment in Chenango County. The growth from 2005 through 2011 in the three categories listed above was approximately 110 jobs, from 1,782 employees to 1,893 employees—at the same total number of establishments—with annual payroll reaching \$62 million. The establishment of a national health care program at in 2014, increasing costs for services and medicines, and the aging population of Chenango County will all play a part in the likely growth of this sector over the short and long term.

Financial Services

NBT Bank, NA began in Norwich over 150 years ago as the Bank of Norwich, and first opened its doors for business on July 15, 1856. At that time, only one other bank operated in the Norwich area. The Bank of Norwich survived several periods of financial "panic", including the one caused by the Civil War, and was then supported by other local industries which grew in the Norwich area during the late 1800's. Preferred Mutual Insurance Company began in 1896 as the Preferred Mutual Fire Insurance Company of Chenango County. It was founded by Frank E. Holmes, and modeled after "The Philadelphia Contributionship

for Insurance of Houses from Loss by Fire”, the first insurance company in the United States. Initially a mutual fire insurance company owned by its policyholders, the company offered coverage at a lower cost than offered elsewhere. The company has evolved over the last 118 years and defines its success by having the very best employees. Today, Preferred Mutual Insurance Company—an “A” rated, high-performing company—employs more than 200 people in New Berlin, Sherburne and Norwich, New York. It operates with a network of nearly 400 agents, located in New York, New Jersey, Massachusetts, and New Hampshire.

Small Businesses & Downtown Retailers

Small businesses are the backbone of the Chenango County economy, as is the case in much of New York State and the nation. Literally hundreds of micro-enterprises and small businesses enrich the landscape of the Chenango County economy.

Chenango is fortunate to retain several downtowns that continue to thrive in the communities of Sherburne, New Berlin, Norwich, Oxford, Greene, Bainbridge, and Afton. While each has a unique set of challenges, and occasional high commercial vacancy rates, the small businesses, retailers, and restaurants that have continued to provide goods and services to the local residents are critical to the character and the quality of life in Chenango County. Many of the downtown structures are historic or part of a historic area.



PART 7: GOALS & STRATEGIES

The following pages outline the true essence of this Strategic Plan: the Goals, Strategies, and Action Items identified by staff, Advisory Committee members, and numerous stakeholders throughout the process of updating this plan. The six key goals identified for Chenango County and its stakeholders to focus on from present day through 2020 are as follows:

- Encourage Business Recruitment, Retention, and Expansion
- Prioritize and Address Workforce Development Needs
- Foster Downtown Revitalization
- Support Housing Development to Meet Community Needs
- Build Tourism, Agrotourism, the Arts, & Cultural Opportunities
- Grow Agriculture and Forestry Industries

A number of specific strategies and action items were identified to support the advancement of the goals listed above. In the following section, readers can reference a timeline for implementation of the specific strategies and action items listed below, as well as gain an understanding of which stakeholder groups and partner organizations are responsible for coordinating the action and outcomes on a given item.

Goal 1: Encourage Business Recruitment, Retention, and Expansion

Strategy 1: Provide Business Development Support, Access to Resources, and Access to Capital

Action 1.1: Support the Small Business Development Center, Morrisville State College and other programs that provide business planning resources and expertise to Chenango entrepreneurs and businesses.

Action 1.2: Support all types of entrepreneurs and small businesses by developing and promoting educational workshops, roundtable discussions, cooperative purchasing, and other opportunities to increase expertise, reduce costs, and links to useful resources.

Action 1.3: Utilize local revolving loan funds to stimulate new business development, retain existing businesses, and stimulate expansion. Seek funding to revitalize the Microenterprise Loan and Grant Programs.

Action 1.4: Develop a comprehensive Business Retention and Expansion Program, which includes access to business planning & goal setting resources, mentoring, and capital.

Action 1.5: Enhance county-wide communication and marketing of available resources, funding sources, and educational opportunities for entrepreneurs and business owners.

Action 1.6: Capitalize on business opportunities presented by natural gas development.

Strategy 2: Facilitate Project Applications for Regional and State Support

Action 2.1: Educate local businesses about the process of applying for state support for their projects.

Action 2.2: Support and assist businesses and communities in completing/submitted project applications.

Action 2.3: Maintain a constructive relationship with the Southern Tier Region and champion projects that will create jobs, revitalize Chenango’s communities, and support the Strategic Plan.

Strategy 3: Facilitate Appropriate Site Selection, Site Development and Infrastructure Installation

Action 3.1: Maintain a comprehensive database of available commercial sites and seek support from area real estate agents to share listing information.

Action 3.2: Promote sites available for sale or lease, or developable industrial land, via the Chenangony.org web-

site and other online sources.

Action 3.3: Encourage sustainable development and the application of Smart Growth Principles county-wide.

Action 3.4: Retain and redevelop the Utica Main rail line, and work with existing or new operators to market nearby sites and facilitate use of the infrastructure.

Action 3.5: Promote investment in modern communications infrastructure, including fiber optics, broadband and cell towers.

Action 3.6: Facilitate installation of natural gas delivery infrastructure to local communities and commercial entities, as well as the development of infrastructure for fueling natural gas vehicles.

Goal 2: Prioritize and Address Education and Workforce Development Needs

Strategy 4: Identify Key Weaknesses and Areas of Opportunity in Local Workforce; Facilitate Communications and Collaborations between Employers and Educators; Seek Funding for Workforce Development

Action 4.1: Facilitate collaboration and information sharing between schools and local employers to address skills gaps and workforce development opportunities/challenges.

Action 4.2: Create marketing materials/virtual tours about careers and local employers to assist school guidance counselors in preparing students for the workplace; focus on career readiness and basic employment skills/requirements.

Action 4.3: Help employers set up displays in schools to teach students about applied skills and employment opportunities.

Action 4.4: Develop and implement hands-on career experiences for students from grade school through high school, including field trips, class speakers, and career days for younger students; shadowing, mentoring, and internships for older students.

Action 4.5: Ensure funding for on the job training programs, and seek new funding opportunities for programs or employers as appropriate.

Strategy 5: Prioritize Efforts to Support Businesses with Employee Recruitment

Action 5.1: Support activities that improve quality of life. Promote Chenango County as a “great place to live” by supporting businesses, community projects, and beautification efforts.

Action 5.2: Provide marketing materials to area employers which promote Chenango County’s assets, low-crime rate, school districts, access to health care, and proximity to numerous major markets.

Action 5.3: Encourage realtors, property owners, and investors to work together to generate desired housing options.

Action 5.4: Explore ways to assist Chenango Memorial Hospital in addressing its unique recruitment challenges.

Strategy 6: Support Increased Enrollment at Morrisville State College’s Norwich Campus and Provide Support for its Development

Action 6.1: Encourage student recruitment by working with real estate developers, local businesses, and the community at large to make appropriate student housing available.

Action 6.2: Determine what new programs/courses could help prepare students for employment at local businesses. Seek funding to support the college’s mission and vision for the Norwich Campus.

Action 6.3: Encourage school districts to utilize Morrisville State College’s Norwich Campus for college credit programming.

Action 6.4: Encourage Morrisville Norwich to offer mini-courses to meet employer’s specific needs and encourage County employers to utilize Morrisville for this type of training

Strategy 7: Conduct a Feasibility Study for a Manufacturing Training Center in Partnership with Local Manufacturers

Action 7.1: Seek grant funding to study the feasibility and possible long term operation/funding structure for a manufacturing training center.

Action 7.2: Identify potential locations and partners for a manufacturing training center if deemed feasible.

Goal 3: Foster Downtown Revitalization

Strategy 8: Make Capital Available to Microenterprises and Downtown Businesses; Encourage Local Support of Local Small Businesses

Action 8.1: Recapitalize the microenterprise revolving loan fund and/or develop a new microenterprise grant program to assist with capital improvements, façade enhancements, machinery and equipment purchases, working capital, or other forms of business expansion assistance.

Action 8.2: Create a Main Street style development program which applies to all downtowns in Chenango County and seek funding support from the Region or NYS.

Action 8.3: Develop walkable downtowns that offer brochures and visitor resources. Facilitate an increase in foot traffic to downtowns through “shop local” marketing and extended store hours aligned with events/holidays.

Strategy 9: Employ Well-Known Main Street Revitalization Techniques and Programs to Enhance Chenango’s Downtowns, Central Business Districts (CBD), and Village Centers

Action 9.1: Examine the unique needs of each downtown/village center in the county. Identify ways in which CBDs could be improved, including enhanced streetscapes—complete with new sidewalks, street furniture, and new lampposts.

Action 9.2: Design and implement a street/landscaping program to improve aesthetics in the CBDs with the use of Community Gateways. Develop sign and architectural design guidelines to improve aesthetics in the County’s commercial areas.

Action 9.3: Promote the redevelopment of vacant and underutilized parcels throughout the county for viable business uses.

Action 9.4: Promote mixed use development, including residential in the upper stories of downtown structures.

Action 9.5: Advocate for a mix of retail, restaurant, service, and the arts in downtowns throughout Chenango County.

Goal 4: Support Housing Development to Meet Community Needs

Strategy 10: Support and Incentivize Rental Property Development/Redevelopment Specifically Targeting Low-Moderate Income Individuals, Senior Citizens, and Young Professionals; Seek Opportunities for Single-Family Housing Market Development

Action 10.1: Work with landlords to identify their needs and develop incentives that encourage them to create more housing options.

Action 10.2: Make tax credit or property tax abatement programs available to rental property investors and large scale developers.

Action 10.3: Utilize revolving loan funds to promote housing development. Explore establishing a loan fund to support the redevelopment of blighted or at-risk properties.

Action 10.4: Research ways to fund or incentivize appropriate development of new single family owner-occu-

ped housing in the county.

Action 10.5: Consider incentivizing home buying in Chenango County with the development of a program, in collaboration with local employers, which rewards new employees for choosing to purchase a home in Chenango County vs. a nearby county.

Strategy 11: Work to Increase Collaboration amongst Property Owners and Communities; Assist with Marketing, Communication, and Funding Applications

Action 11.1: Create marketing materials which will inform potential rental housing investors about support and resources available to them.

Action 11.2: Chenango County Housing Council should consider developing a website that can serve as a one-stop-shop for housing related information, resources, and available investment properties in Chenango County.

Action 11.3: Facilitate discussions amongst landlord/rental property owners, realtors, and communities regarding real estate market needs.

Action 11.4: Facilitate applications for funding through the Regional Council, New York State, and other funding sources to assist in addressing Chenango County's housing needs.

Goal 5: Build Tourism, Agrotourism, the Arts, Historic, and Cultural Opportunities

Strategy 12: Promote the County's Cultural Events, Festivals, Tourism Properties, Natural Resources, Heritage Areas, and Recreational Opportunities as a Vital Component to Chenango's Quality of Life, and Facilitate Cooperation and Communication Amongst all Stakeholders

Action 12.1: Seek creative new advertising opportunities to promote Chenango's assets.

Action 12.2: Participate in regional programs/websites to promote local ag producers and farm stands. Promote seasonal agri-tourism tours and u-pick opportunities.

Action 12.3: Encourage expanded use of trail systems (hiking, biking, snowmobiling), rivers (fishing and boating), and other outdoor recreation by residents and visitors. Develop a comprehensive map/guide that features these items.

Action 12.4: Facilitate communication among tourism partners to promote Chenango County as a whole. Develop "packages" that combine multiple activities, properties, or events.

Action 12.5: Promote and further develop the county's Tourism Promotion Agency's events calendar, and seek to integrate it with other organizations' websites and other new technologies.

Action 12.6: Research the viability and cost of integrating all tourism, arts, events, heritage, and recreational opportunities into an online/mobile ready application.

Strategy 13: Invest Resources to Resolve Chenango County's Current Shortcomings in the Lodging & Hospitality Industry

Action 13.1: Seek to increase the total number of quality rooms available in Chenango County by supporting small hotel and bed & breakfast development. Identify developers that may be interested in new hotel development.

Action 13.2: Utilize County lodging study to guide development of a hotel/conference center focused on business travelers and larger events.

Action 13.3: Provide financial incentives to assist in the development of appropriate lodging.

Action 13.4: Integrate regional lodging reservation system into the county Tourism Promotion Agency's website; encourage hotels, motels, and bed & breakfasts to use the system.

Strategy 14: Attract State Support and Regional Funding to Assist in the Growth of Cultural, Recreational, and Agri-Tourism Opportunities throughout Chenango County

Action 14.1: Support agri-tourism businesses, arts, and cultural opportunities with grant or loan funding and marketing and advertising promotion as appropriate.

Action 14.2: Continue to seek matching funds support from NYS, and work with local tourism properties and cultural events to fund more projects/properties.

Action 14.3: Facilitate grant/loan applications for projects which impact quality of life, tourism, and economic development.

Goal 6: Grow Agriculture and Forestry Industries

Strategy 15: Support Agricultural Economic Development through Access to Resources, Advocacy, and Capital

Action 15.1: Provide support for business planning, succession planning, and access to information regarding grants, loans and other resources available to assist in farm business development.

Action 15.2: Use existing revolving loan funds to assist in the retention and expansion of agricultural businesses; Facilitate funding applications to the region and state for agricultural business development.

Action 15.3: Promote the retention and expansion of the dairy industry in Chenango County and throughout the region; advocate for fair pricing for dairy farmers at the Federal level.

Action 15.4: Facilitate/promote direct relationships between dairy manufacturers and dairy farmers and other local agricultural producers. Consider a cooperative model for agriculture production and marketing.

Action 15.5: Foster the development of livestock businesses and appropriate access to processing facilities.

Action 15.6: Update research regarding the feasibility of a small-scale shared commercial kitchen/processing facility; if merited, facilitate establishment of a facility, or the expansion of existing space to meet the needs of local producers.

Strategy 16: Support the Development and Expansion of Forestry Industries, Maple Production, and Fallow-land Production

Action 16.1: Assist in the development of agro-forestry businesses, including firewood production, sawmills, prefabricated sheds, wood pellets, and other products that utilize available wood resources.

Action 16.2: Promote and facilitate oil seed farming and production on fallow lands, and seek funding needed for a small scale oil seed press production facility which would serve multiple growers.

Action 16.3: Promote and facilitate leasing of woodlots for maple production, and getting agricultural tax exemptions for properties which qualify; Assist in attaining funding needed for larger scale sap buying operations.

Action 16.4: Make renewable maple crops a priority by promoting the development of maple production and maple based tourism and marketing; seek funding to expand the Maple Festival at the Chenango County Historical Society Facility.

Action 16.5: Promote better management practices for long term health and viability of Chenango's privately held forests; provide access to education and/or funding to improve management over the long term.

Action 16.6: Make use of revolving loan funds and other resources to stimulate the expansion of agro-forestry businesses.

Strategy 17: Coordinate Marketing and Communication Efforts for the Development and Distribution of Local Agricultural Products and the Attraction of New Producers

Action 17.1: Assist in the coordination of access to markets/distribution to larger markets or new marketing methods; participate in regional branding and marketing initiatives.

Action 17.2: Create a new ag economic development website, pooling ag development resources and funding sources for ag expansion. Target marketing to groups and individuals both inside and outside Chenango County.

Action 17.3: Identify and market available farms/prime agricultural land through websites and YouTube; target marketing to groups/individuals inside and outside Chenango County.

Index of Economic Development Partner Organizations & Abbreviations:

Bainbridge Development Corporation (BDC)
Chenango County Agriculture Development Council (CCADC)
Chenango County Arts Council (CCAC)
Chenango County Farm Bureau (CCFB)
Chenango County Government (County)
Chenango County Housing Council (CCHC)
Chenango County Industrial Development Agency (CCIDA)
Chenango County Planning Department (CCPD)
Chenango County School District Association (CCSDA)
City of Norwich (City)
Commerce Chenango (CC)
Commerce Chenango Tourism (CC Tourism)
Cornell Cooperative Extension (CCE)
Delaware Chenango Madison Otsego BOCES (DCMO BOCES)
Development Chenango Corporation (DCC)
Morrisville State College Norwich (MSCN)
New York Business Development Corporation (NYBDC)
Norwich Business Improvement District Management Assoc. (BID)
Opportunities for Chenango (OFC)
Other Municipalities (OM)
Oxford Industrial Development Agency (OIDA)
Service Corps. Of Retired Executives (SCORE)
Sherburne Area Local Development Corporation (SALDC)
Small Business Development Center (SBDC)
Southern Tier East Regional Planning Board (STERPB)
Southern Tier Regional Economic Development Council (STREDC)
Workforce Collaborative TBD (WC TBD)
Workforce Investment Board (WIB)

PART 8: IMPLEMENTATION PLAN & TIMELINE

The following section includes a proposed implementation plan for the action items indicated in the Goals & Strategies section. The chart includes the specific action item, the year or years during which that item should be addressed, and the economic development partners responsible for addressing the item.

Certain economic development actions are categorized as “always/ongoing” versus being scheduled for action during a specific year of the implementation timeline, because those services or programs are important to maintain on an ongoing basis, or have already begun to be implemented by a partner.

GOAL 1: Encourage Business Recruitment, Retention, and Expansion

| Goal 1, Strategy 1: Provide Business Development, Support, Access to Resources, and Access to Capital | Timeline | Partner Responsible |
|--|------------------------|-----------------------------------|
| Action 1.1: Support the Small Business Development Center, Morrisville State College and other programs that provide business planning resources and expertise to Chenango entrepreneurs and businesses. | Always/ongoing | CC, DCC |
| Action 1.2: Support all types of entrepreneurs and small businesses by developing and promoting educational workshops, roundtable discussions, cooperative purchasing, and other opportunities to increase expertise, reduce costs, and links to useful resources. | 2014-2015 | CC, DCC |
| Action 1.3: Utilize local revolving loan funds to stimulate new business development, retain existing businesses, and stimulate expansion. Seek funding to revitalize the Microenterprise Loan and Grant Programs. | Always/ongoing | DCC, City, SALDC, CCPD |
| Action 1.4: Develop a comprehensive Business Retention and Expansion Program, which includes access to business planning & goal setting resources, mentoring, and capital. | 2015-2016 | DCC, SBDC, SCORE |
| Action 1.5: Enhance county-wide communication and marketing of available resources, funding sources, and educational opportunities for entrepreneurs and business owners. | 2014-2020 | DCC, CCE |
| Action 1.6: Capitalize on business opportunities presented by natural gas development and assist local businesses and educators in meeting the needs of the industry. | As opportunities arise | CC, DCC, CCE |
| Goal 1, Strategy 2: Facilitate Project for Regional and State Support | Timeline | Partner Responsible |
| Action 2.1: Educate local businesses about the process of applying for state support for their projects. | Always/Ongoing | DCC, CCE, CCPD |
| Action 2.2: Support and assist businesses and communities in completing/submitted project applications. | Always/Ongoing | DCC, CCE, CCPD |
| Action 2.3: Maintain a constructive relationship with the Southern Tier Region and champion projects that will create jobs, revitalize Chenango’s communities, and support the Strategic Plan. | Always/Ongoing | DCC, CCE, CCPD, Private employers |

| Goal 1, Strategy 3: Facilitate Appropriate Site Selection, Site Development and Infrastructure Installation | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 3.1: Maintain a comprehensive database of available commercial sites and seek support from area real estate agents to share listing information. | 2015-2020 | DCC, CCIDA, City, Realtors |
| Action 3.2: Promote sites available for sale or lease, or developable industrial land, via the Chenangony.org website and other online sources. | Always/On-going | DCC/CCIDA |
| Action 3.3: Encourage sustainable development and the application of Smart Growth Principles county-wide. | Always/On-going | CCPD, City, OM |
| Action 3.4: Retain and redevelop the Utica Main rail line, and work with existing or new operators to market nearby sites and facilitate use of the infrastructure. | 2015-2016 | CCIDA, DCC, CCPD, County |
| Action 3.5: Promote investment in modern communications infrastructure, including fiber optics, broadband and cell towers. | 2015-2017 | DCC, CCIDA, County |
| Action 3.6: Facilitate installation of natural gas delivery infrastructure to local communities and commercial entities, as well as development of infrastructure for fueling natural gas vehicles. | 2016-2020 | CCIDA, County |

GOAL 2: Prioritize and Address Education and Workforce Development Needs

| Goal 2, Strategy 4: Identify Key Weaknesses and Areas of Opportunity in Local Workforce; Facilitate Communications and Collaborations between Employers and Educators; Seek Funding for Workforce Development | Timeline | Partner Responsible |
|--|-----------------|-----------------------------------|
| Action 4.1: Facilitate collaboration and information sharing between schools and local employers to address skills gaps and workforce development opportunities/challenges. | 2015 | DCC, Workforce Collaborative TBD |
| Action 4.2: Create marketing materials/virtual tours about careers/ local employers to assist school guidance counselors in preparing students for the workplace; focus on career readiness & basic employment skills. | 2015-2016 | DCC, Workforce Collaborative TBD |
| Action 4.3: Help employers set up displays in schools to teach students about applied skills and employment opportunities. | 2015 | DCC, DCMO BOCES, CCS-DA |
| Action 4.4: Develop and implement hands-on career experiences for students from grade school through high school, including field trips, class speakers, and career days for younger students; shadowing, mentoring, and internships for older students. | 2016-2017 | DCC, WIB, MSCN, DCMO BOCES, CCSDA |
| Action 4.5: Ensure funding for on the job training programs, and seek new funding opportunities for programs or employers as appropriate. | 2015-2020 | DCC, WIB, Private employers |

| Goal 2, Strategy 5: Prioritize Efforts to Support Businesses with Employee Recruitment | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 5.1: Support activities that improve quality of life. Promote Chenango County as a “great place to live” by supporting businesses, community projects, and beautification efforts. | Always/On-going | CC, DCC |
| Action 5.2: Provide marketing materials to area employers which promote Chenango County’s assets, low-crime rate, school districts, access to health care, and proximity to numerous major markets. | Always/On-going | CC, DCC |
| Action 5.3: Encourage realtors, property owners, and investors to work together to generate desired housing options. | 2015-2018 | DCC, CC |
| Action 5.4: Explore ways to assist Chenango Memorial Hospital in addressing its unique recruitment challenges. | 2014-2015 | DCC |

| Goal 2, Strategy 6: Support Increased Enrollment at Morrisville State College’s Norwich Campus and Provide Support for its Development | Timeline | Partner Responsible |
|--|-----------------|----------------------------|
| Action 6.1: Encourage student recruitment by working with real estate developers, local businesses, and the community at large to make appropriate student housing available. | 2015-2017 | MSCN, DCC, City |
| Action 6.2: Determine what new programs/courses could help prepare students for employment at local businesses. Seek funding to support the college’s mission and vision for the Norwich Campus. | 2014-2015 | MSCN, DCC, City |
| Action 6.3: Encourage school districts to utilize Morrisville State College’s Norwich Campus for college credit programming. | Always/On-going | MSCN, DCC, City |

| Goal 2, Strategy 7: Conduct a Feasibility Study for a Manufacturing Training Center in Partnership with Local Manufacturers | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 7.1: Seek grant funding to study the feasibility and possible long term operation/funding structure for a manufacturing training center. | 2015 | DCC, CCIDA, CCPD |

GOAL 3: Foster Downtown Revitalization

| Goal 3, Strategy 8: Make Capital Available to Microenterprises and Downtown Businesses; Encourage Local Support of Local Small Businesses | Timeline | Partner Responsible |
|---|-----------------|---------------------------------|
| Action 8.1: Recapitalize the microenterprise revolving loan fund and/or develop a new microenterprise grant program to assist with capital improvements, façade enhancements, machinery & equipment purchases, working capital, or other business expansion assistance. | 2015 | DCC, CCPD, County |
| Action 8.2: Create a Main Street style development program which applies to all downtowns in Chenango County and seek funding support from the Region or NYS. | 2016 | DCC |
| Action 8.3: Develop walkable downtowns that offer brochures and visitor resources. Facilitate an increase in foot traffic to downtowns through “shop local” marketing and extended store hours aligned with events/holidays. | Always/On-going | DCC, BID, County, OM, City, BID |

| Goal 3, Strategy 9: Employ Well-Known Main Street Revitalization Techniques and Programs to Enhance Chenango’s Downtowns, Central Business Districts (CBD), and Village Centers | Timeline | Partner Responsible |
|--|-----------------|----------------------------|
| Action 9.1: Examine the unique needs of each downtown/village center in the county. Identify ways in which CBDs could be improved, including enhanced streetscapes. | 2015-2017 | DCC, OM |
| Action 9.2: Design and implement a street/landscaping program to improve aesthetics in the CBDs with the use of Community Gateways. Develop sign and architectural design guidelines to improve aesthetics in the County’s commercial areas. | 2017 | County, CCPD, City, OM |
| Action 9.3: Promote the redevelopment of vacant and underutilized parcels throughout the county for viable business uses. | Always/On-going | DCC, CCIDA, CCPD, City, OM |
| Action 9.4: Promote mixed use development, including residential in the upper stories of downtown structures. | Always/On-going | DCC, CCPD, City, BID, OM |
| Action 9.5: Advocate for a mix of retail, restaurant, service, and the arts in downtowns throughout Chenango County. | Always/On-going | DCC, CCPD, City, BID, OM |

GOAL 4: Support Housing Development to Meet Community Needs

| Goal 4, Strategy 10: Support and Incentivize Rental Property Development Targeting Low-Moderate Income Individuals, Senior Citizens, and Young Professionals; Seek Single-Family Housing Development Opportunities | Timeline | Partner Responsible |
|--|-----------------|----------------------------|
| Action 10.1: Work with landlords to identify their needs and develop incentives that encourage them to create more housing options. | 2015-2016 | DCC, CCHC, CCPD |
| Action 10.2: Make tax credit or property tax abatement programs available to rental property investors and large scale developers. | 2016-2017 | County, City, OM |
| Action 10.3: Utilize revolving loan funds to promote housing development. Explore establishing a loan fund to support the redevelopment of blighted or at-risk properties. | 2016-2020 | DCC, County, OM |
| Action 10.4: Research ways to fund or incentivize appropriate development of new single family owner-occupied housing in the county. | 2015 | DCC, CCHC, Realtors |
| Action 10.5: Consider incentivizing home buying in Chenango County with the development of a program, in collaboration with local employers, which rewards new employees for choosing to purchase a home in Chenango County vs. a nearby county. | 2015-2016 | DCC, Private employers |

| Goal 4, Strategy 11: Work to Increase Collaboration amongst Property Owners and Communities; Assist with Marketing, Communication, and Funding Applications | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 11.1: Create marketing materials which will inform potential rental housing investors about support and resources available to them. | 2015 | DCC, CCPD, CCHC |
| Action 11.2: Chenango County Housing Council should consider developing a website that can serve as a one-stop-shop for housing related information, resources, and available investment properties in Chenango County. | 2014-2015 | CCHC |
| Action 11.3: Facilitate discussions amongst landlord/rental property owners, realtors, and communities regarding real estate market needs. | 2015 | DCC, CCPD, CCHC |
| Action 11.4: Facilitate applications for funding through the Regional Council, New York State, and other funding sources to assist in addressing Chenango County's housing needs. | Always/Ongoing | DCC, CCPD, CCHC |

GOAL 5: Build Tourism, Agritourism, the Arts, Historic, and Cultural Opportunities

| Goal 5, Strategy 12: Promote the County's Cultural Events, Festivals, Tourism Properties, Natural Resources, Heritage Areas, and Recreational Opportunities as a Vital Component to Chenango's Quality of Life, Facilitate Cooperation and Communication Amongst all Stakeholders | Timeline | Partner Responsible |
|--|-----------------|--|
| Action 12.1: Seek creative new advertising opportunities to promote Chenango's assets. | 2014-2020 | CC Tourism, DCC, CCE, CCADC |
| Action 12.2: Participate in regional programs/websites to promote local ag producers and farm stands. Promote seasonal agri-tourism tours and u-pick opportunities. | Always/On-going | CC Tourism, CCE, CCADC |
| Action 12.3: Encourage expanded use of trail systems (hiking, biking, snowmobiling), rivers (fishing and boating), and other outdoor recreation by residents and visitors. Develop a comprehensive map/guide that features these items. | 2015 | CC Tourism, CCPD, CCE, CCADC |
| Action 12.4: Facilitate communication among tourism partners to promote Chenango County as a whole. Develop "packages" that combine multiple activities, properties, or events. | 2015-2016 | CC Tourism, CCE, CCAC |
| Action 12.5: Promote and further develop the county's Tourism Promotion Agency's events calendar; integrate it with other organizations' websites and other new technologies. | 2015 | CC Tourism, all other tourism partners |
| Action 12.6: Research the viability and cost of integrating all tourism, arts, events, heritage, and recreational opportunities into an online/mobile ready application. | 2014-2015 | CC Tourism, CCAC |

| Goal 5, Strategy 13: Invest Resources to Resolve Chenango County's Current Shortcomings in the Lodging & Hospitality Industry | Timeline | Partner Responsible |
|--|-----------------|-----------------------------|
| Action 13.1: Seek to increase the total number of quality rooms available in Chenango County by supporting small hotel and bed & breakfast development. Identify developers that may be interested in new hotel development. | 2015-2016 | CC Tourism, DCC |
| Action 13.2: Discuss funding options for a market study to determine the feasibility of a hotel/conference center focused on business travelers and larger events. | 2014 | CC Tourism, CC, DCC, County |
| Action 13.3: Provide financial incentives to assist in the development of appropriate lodging. | 2015-2016 | DCC, CCIDA, STREDC |
| Action 13.4: Integrate regional lodging reservation system into the county Tourism Promotion Agency's website; encourage hotels, motels, and bed & breakfasts to use the system. | 2014 | CC Tourism |

| Goal 5, Strategy 14: Attract State Support and Regional Funding to Assist in the Growth of Cultural, Recreational, and Agritourism Opportunities throughout Chenango County | Timeline | Partner Responsible |
|--|-----------------|----------------------------------|
| Action 14.1: Support agritourism businesses, arts, and cultural opportunities with grant or loan funding and marketing and advertising promotion as appropriate. | Always/Ongoing | CC Tourism, DCC, CCAC, CCE |
| Action 14.2: Continue to seek matching funds support from NYS, and work with local tourism properties and cultural events to fund more projects/properties. | Always/Ongoing | CC Tourism |
| Action 14.3: Facilitate grant/loan applications for projects which impact quality of life, tourism, and economic development. | Always/Ongoing | DCC, CCAC, CC Tourism, CCE, CCPD |

GOAL 6: Grow Agriculture and Forestry Industries

| Goal 6, Strategy 15: Support Agricultural Economic Development through Access to Resources, Advocacy, and Capital | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 15.1: Provide support for business planning, succession planning, and access to information regarding grants, loans and other resources available to assist in farm business development. | Always/Ongoing | DCC, CCE, SBDC, SCORE |
| Action 15.2: Use existing revolving loan funds to assist in the retention and expansion of agricultural businesses; Facilitate funding applications to the region and state for agricultural business development. | 2014-2020 | DCC, CCE, County, CCPD |
| Action 15.3: Promote the retention and expansion of the dairy industry in Chenango County and throughout the region; advocate for fair pricing for dairy farmers at the Federal level. | Always/Ongoing | CCE, DCC, CC, CCFB, FSA |
| Action 15.4: Facilitate/promote direct relationships between dairy manufacturers and dairy farmers and other local agricultural producers. Consider a cooperative model for agriculture production and marketing. | 2015-2016 | CCE, CCFB, CCADC, DCC |
| Action 15.5: Foster the development of livestock businesses and appropriate access to processing facilities. | Always/Ongoing | CCE, DCC |
| Action 15.6: Update research regarding the feasibility of a small-scale shared commercial kitchen/processing facility; if merited, facilitate establishment of a facility, or the expansion of existing space to meet the needs of local producers. | 2015 | CCE, CCADC, DCC |

| Goal 6, Strategy 16: Support the Development and Expansion of Forestry Industries, Maple Production, and Fallow-land Production | Timeline | Partner Responsible |
|--|-----------------|---|
| Action 16.1: Assist in the development of agro-forestry businesses, including firewood production, sawmills, prefabricated sheds, wood pellets, and other products that utilize available wood resources. | 2014-2020 | DCC, CCIDA, CCE, CCFB |
| Action 16.2: Promote and facilitate oil seed farming and production on fallow lands, and seek funding needed for a small scale oil seed press production facility which would serve multiple growers. | 2016 | CCE, CCFB, CCADC, DCC |
| Action 16.3: Promote and facilitate leasing of woodlots for maple production, and getting agricultural tax exemptions for properties which qualify; Assist in attaining funding needed for larger scale sap buying operations. | 2017 | CCE, CCADC, DCC |
| Action 16.4: Make renewable maple crops a priority by promoting the development of maple production and maple based tourism and marketing; seek funding to expand the Maple Festival at the Chenango County Historical Society Facility. | 2016 | Lead: CCE Other Partners: CCADC, DCC |
| Action 16.5: Promote better management practices for long term health and viability of Chenango's privately held forests; provide access to education and/or funding to improve management over the long term. | Always/On-going | DCC, CCE |
| Action 16.6: Make use of revolving loan funds and other resources to stimulate the expansion of agro-forestry businesses. | 2016 | DCC, County, CCPD, SALDC, OIDA |

| Goal 6, Strategy 17: Coordinate Marketing and Communication Efforts for the Development and Distribution of Local Agricultural Products and the Attraction of New Producers | Timeline | Partner Responsible |
|---|-----------------|----------------------------|
| Action 17.1: Assist in the coordination of access to markets/distribution to larger markets or new marketing methods; participate in regional branding and marketing initiatives. | Always/On-going | DCC, County |
| Action 17.2: Create a new ag economic development website, pooling ag development resources and funding sources for ag expansion. Target marketing to groups and individuals both inside and outside Chenango County. | 2017 | CC, DCC, County |
| Action 17.3: Identify and market available farms/prime agricultural land through websites and YouTube; target marketing to groups/individuals inside and outside Chenango County. | 2016 | CC, DCC, County |