



STREDC Strategic Plan Update 2023

OPEN HOUSE

OCTOBER 2023

HR&A



Steuben
Schuyler
Chemung
Tompkins
Tioga
Broome
Chenango
Delaware

Agenda

Welcome and Introductions

Strategic Plan Process

Existing Conditions & Regional Investment

Public Question & Answer

Regional Challenge Competition Overview

Break Out Stations: REGIONAL CHALLENGE

WELCOME & INTRODUCTORY REMARKS

STREDC Executive Committee:

- **Judy McKinney Cherry** – STREDC Co-Chair
- **Dr. Kevin Drumm** – STREDC Co-Chair
- **Omar Sanders** – Regional Director of Southern Tier Regional Office, ESD

Consultant Team: HR&A

Meeting Notes:

- Participants are present both on zoom and in-person.
- A short presentation will be followed by separate interactive sessions (online and in-person).
- For attendees on zoom, please raise your hand when you would like to participate.
- Please mute your audio when you are not speaking!



The purpose of today's meeting is to share information with members of the public on the STREDC 2023 Strategic Plan Update process – and to gather your input on our economic development vision and strategies.

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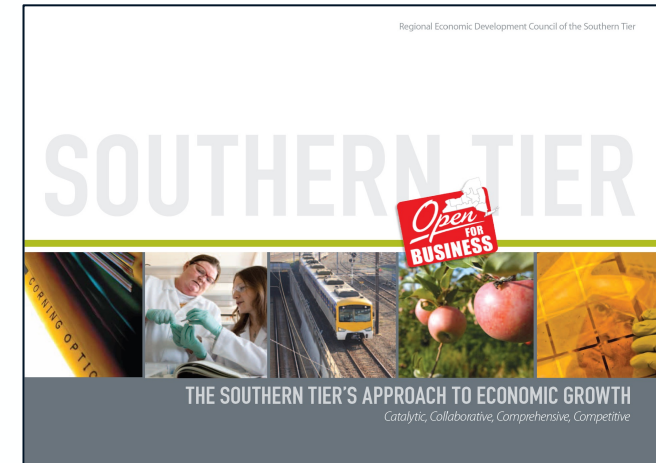
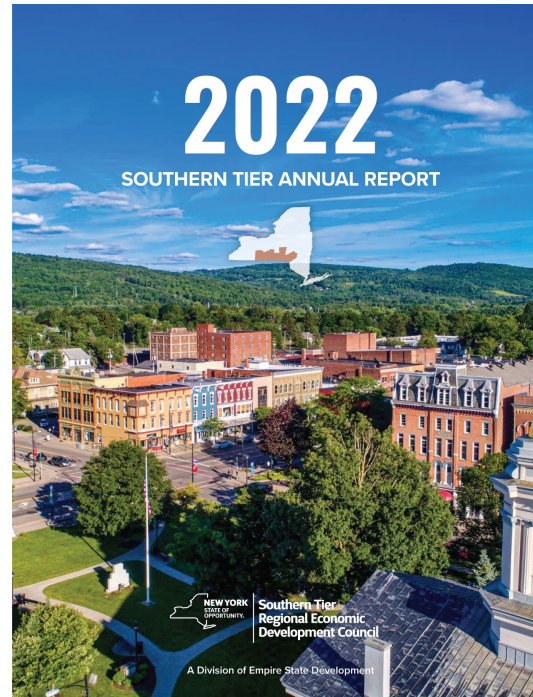
Break Out Stations: REGIONAL CHALLENGE

STRATEGIC PLAN PROCESS OVERVIEW

In collaboration with the Steering Committee and REDC work groups, the REDC will build on the 2011 Strategic Plan, Southern Tier Soaring Urban Revitalization Initiative Plan, and subsequent updates to define a vision for the economic future for the Southern Tier, with specific strategies and priority projects.

The updated Strategic Plan will:

- Provide an updated **economic vision** for the Southern Tier.
- Describe **recent economic and demographic trends**.
- Evaluate **key regional assets** to build on.
- **Identify strategies to advance and projects to fund** that will support the economic vision based on lessons learned from previous initiatives and best practices.
- **Propose a Regional Challenge** – 3 regions will be awarded up to \$10M. The STREDC will focus on **Population & Talent Attraction, Development and Retention**.



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STRATEGIC PLAN PROCESS OVERVIEW

The new Strategic Plan will have three components.

1 Executive Summary

State of the Region

- Economic metrics
- Demographic trends

Status of Past CFA Projects

- Status and lessons learned from previously funded projects

2 Strategic Plan Update

Strategic Plan Update

- Economic vision for the region's future
- Strategies to capitalize on regional assets to meet that vision

Participation

- Working group outreach
- Public engagement

3 Regional Challenge

Challenge Overview

- Select a regional challenge to address
- Describe how the challenge is affecting the region

Challenge Proposal

- Present a project to fund to address this challenge for up to \$10 million in State funding

STRATEGIC PLAN PROCESS OVERVIEW

The 2023 Plan Update will revisit and update the growth priorities that the STREDC has promoted over the last decade.

 Build the Greater Binghamton Innovation Ecosystem	<ul style="list-style-type: none"> • Revitalize Binghamton, Johnson City, Endicott • Develop innovation districts to capitalize on public-private collaborations • Grow presence of Binghamton University
 Invest in Advanced Manufacturing	<ul style="list-style-type: none"> • Support advanced manufacturing by building a skilled workforce pipeline, identifying infrastructure & capital improvements, and directly funding small and medium sized enterprises • Build concentration of multi-national anchor companies • Capitalize on education and research resources by partnering on workforce training, leveraging R&D commercialization, and supporting incubation & business growth
 Transform Food & Agriculture	<ul style="list-style-type: none"> • Position the Southern Tier as key food supplier for the East Coast • Grow agriculture and food production, processing, and distribution • Strengthen links to growing tourism and manufacturing industries
 Promote the ST's Innovative Culture	<ul style="list-style-type: none"> • Make the Southern Tier a highly desirable place to visit, live and grow a business • Increase capacity for innovation, including talent attraction/retention
 Develop Tourism Business	<ul style="list-style-type: none"> • Maximize attractiveness of Southern Tier natural and cultural amenities • Focus on regional promotion and a well-trained tourism and hospitality workforce

STRATEGIC PLAN PROCESS OVERVIEW

A Steering Committee is guiding the plan update, with support from the HR&A team and input from the REDC and the public.

Southern Tier REDC

- **Review** the Strategic Plan update and **provide comments** at key milestones:
 - Plan Outline
 - Plan Draft
 - Community Challenge Evaluation
- **Workgroup and meeting** logistics

Steering Committee

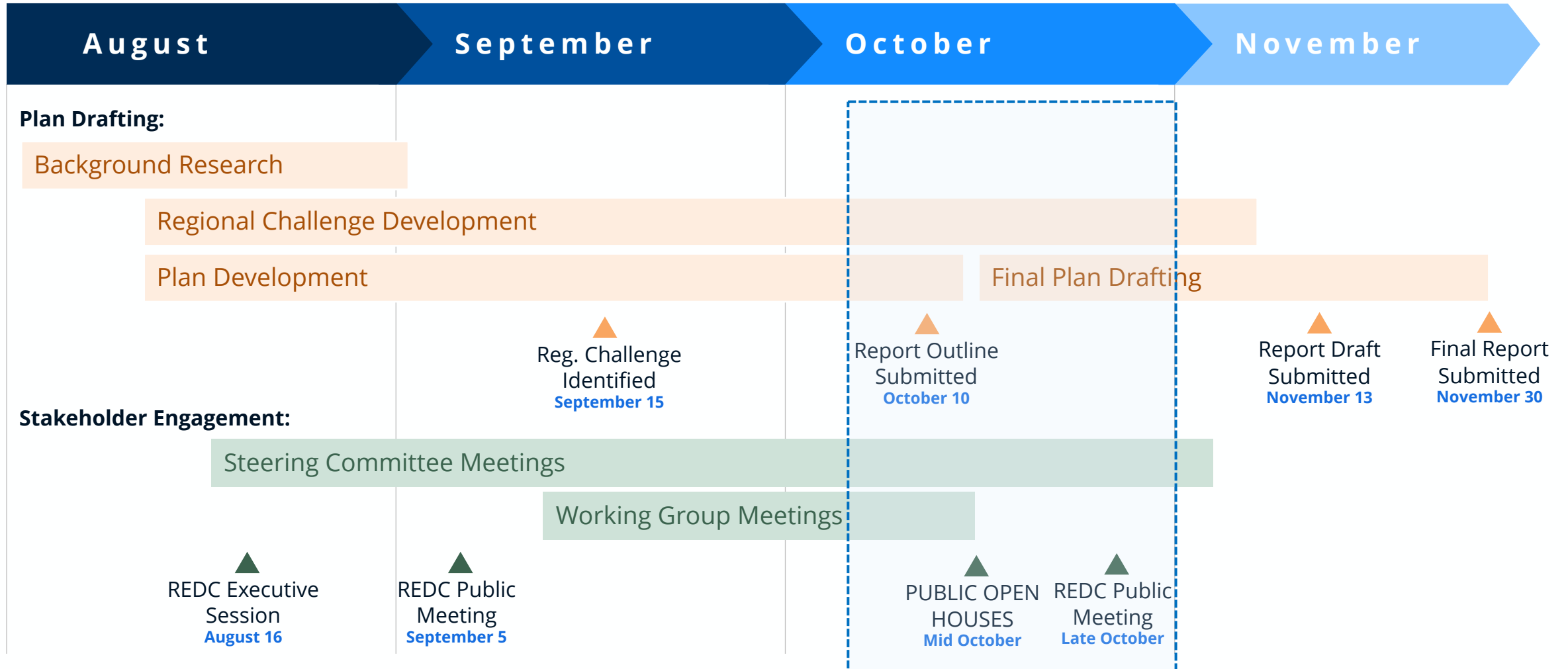
- **Define priorities** for Strategic Plan update
- **Identify strategies** to include in the Strategic Plan
- **Choose a community challenge topic**

HR&A + ESD Staff

- **Research** and **analyze** demographic and economic conditions for regional assessment
- **Facilitate** stakeholder engagement through the Steering Committee, Work Groups, and public engagement
- **Draft** the Strategic Plan

SCHEDULE

We have conducted background research, engaged the **Steering Committee and Working Groups**, and are developing the **Regional Challenge and Strategic Plan** now through November 30th.



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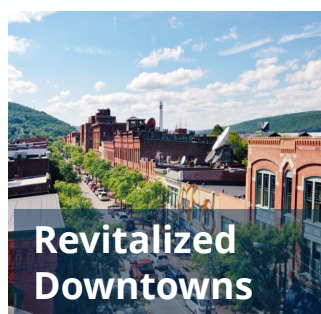
Break Out Stations: REGIONAL CHALLENGE

SOUTHERN TIER TODAY

There are many assets across the Southern Tier that have been identified in previous reports that are poised to support economic growth in the future.

Strengths and Assets

- Home to **world-class universities** that support a robust ecosystem of research and development, especially in the **Science Technology Engineering and Math (STEM) and Agriculture fields**.
- Concentration of anchor employers, especially in **manufacturing, healthcare, and education**, and a skilled workforce in those industries.
- Momentum around **emerging battery technology** that can be leveraged to foster additional **cleantech innovation** in the region.
- Key urban centers are **growing and stabilizing**, including Greater Binghamton and Ithaca.
- The region is becoming **more diverse**.
- The Southern Tier is **rich in natural beauty** and tourist destinations.

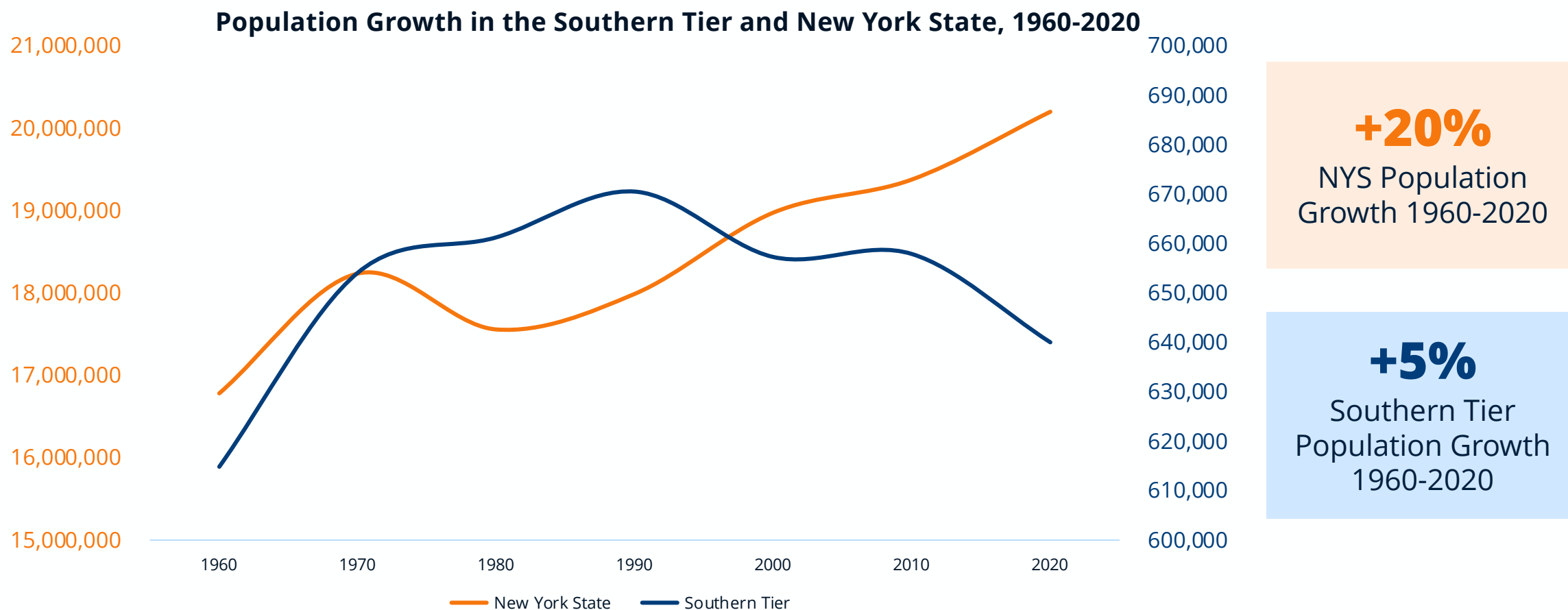


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SOUTHERN TIER TODAY

The region also faces challenges. Southern Tier's population **peaked in 1990** and has since declined while the **rest of the state has gradually increased its population**.

From 2000-2010 decline tapered off, but from 2010-2020 the **pace of population loss has increased**.



SOUTHERN TIER TODAY

The region's **population has also aged** over the past decade.

At the same time, its working population has **one of the highest poverty rates in the state**, indicating a need for higher-paying jobs.

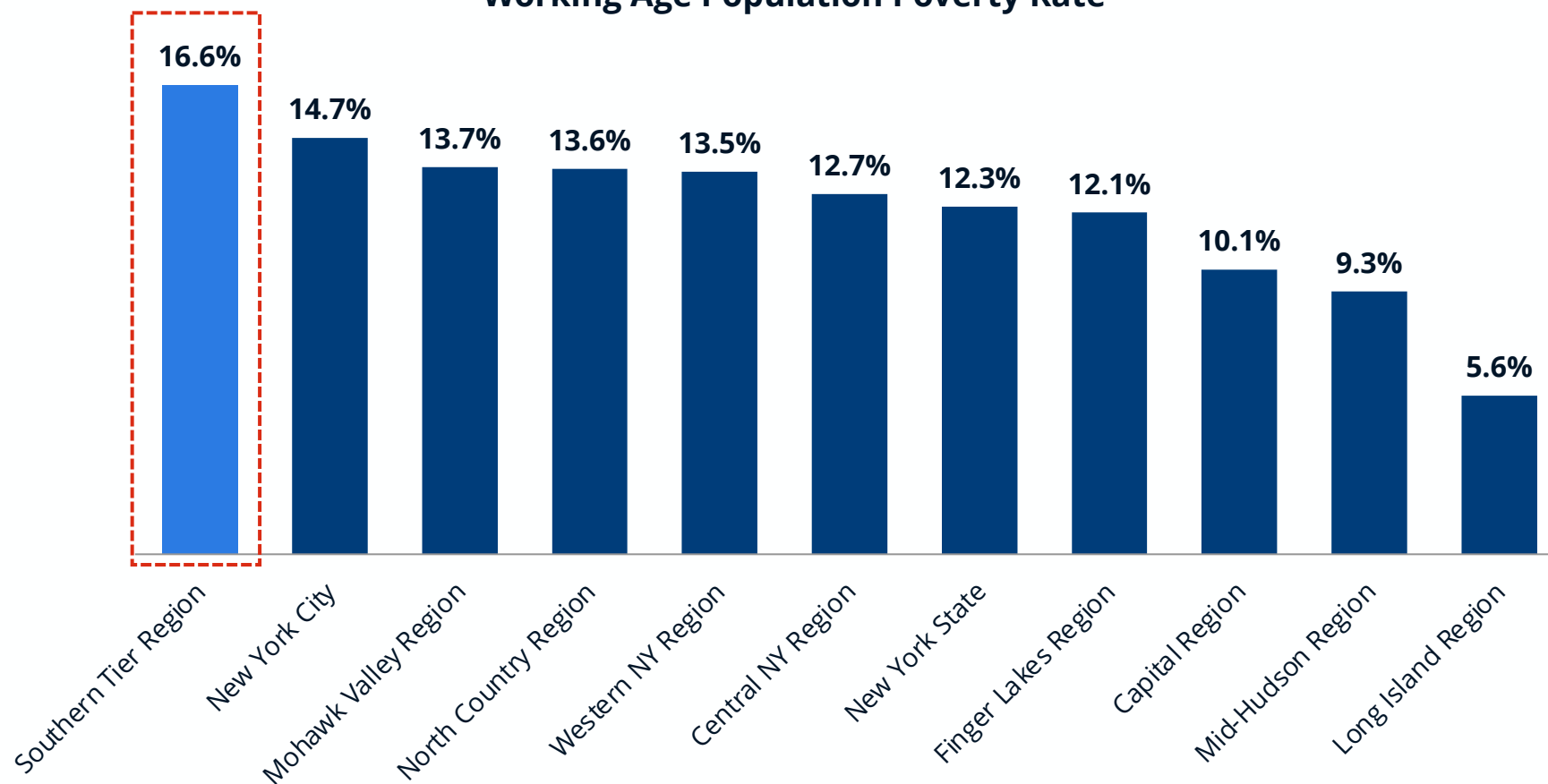
-2%

Population
change (2011-
2021)

+16%

Change in
population 55+
(2011-2021)

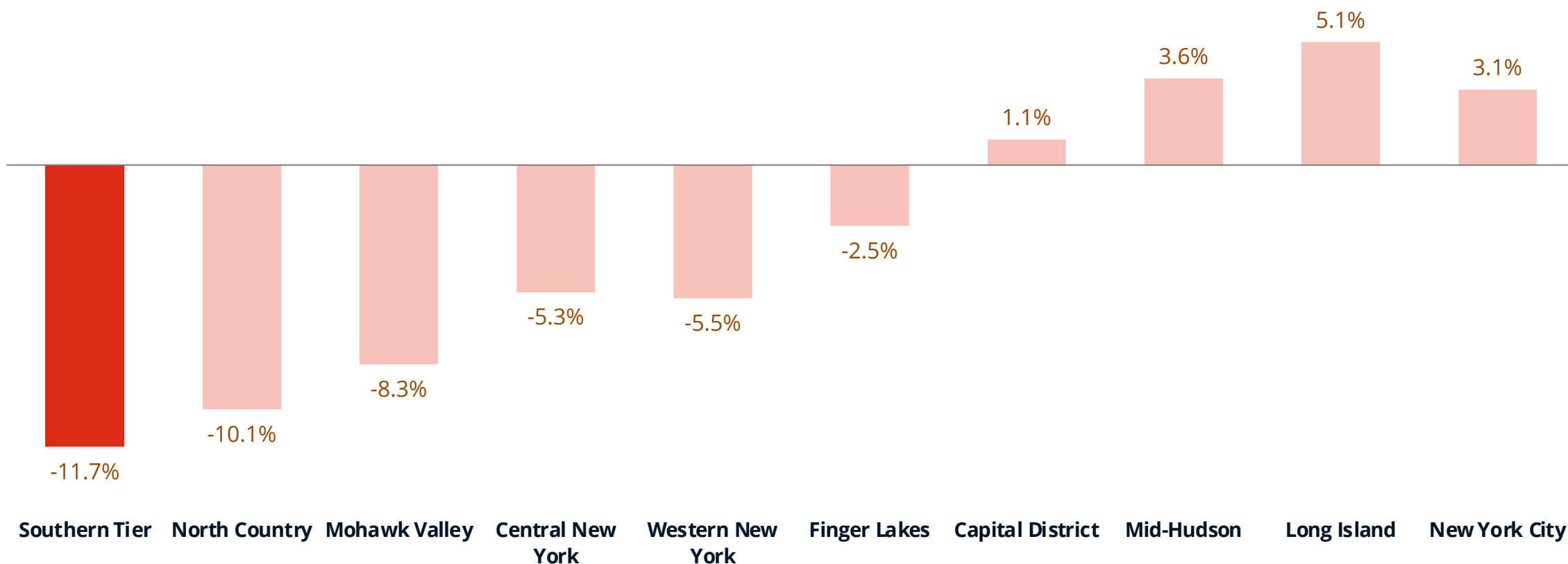
Working Age Population Poverty Rate



SOUTHERN TIER TODAY

The Southern Tier's labor force has **decreased more than any other region in the state**, due to the combination of a **declining and aging population**.

Change in Labor Force by Region (2011-2022)

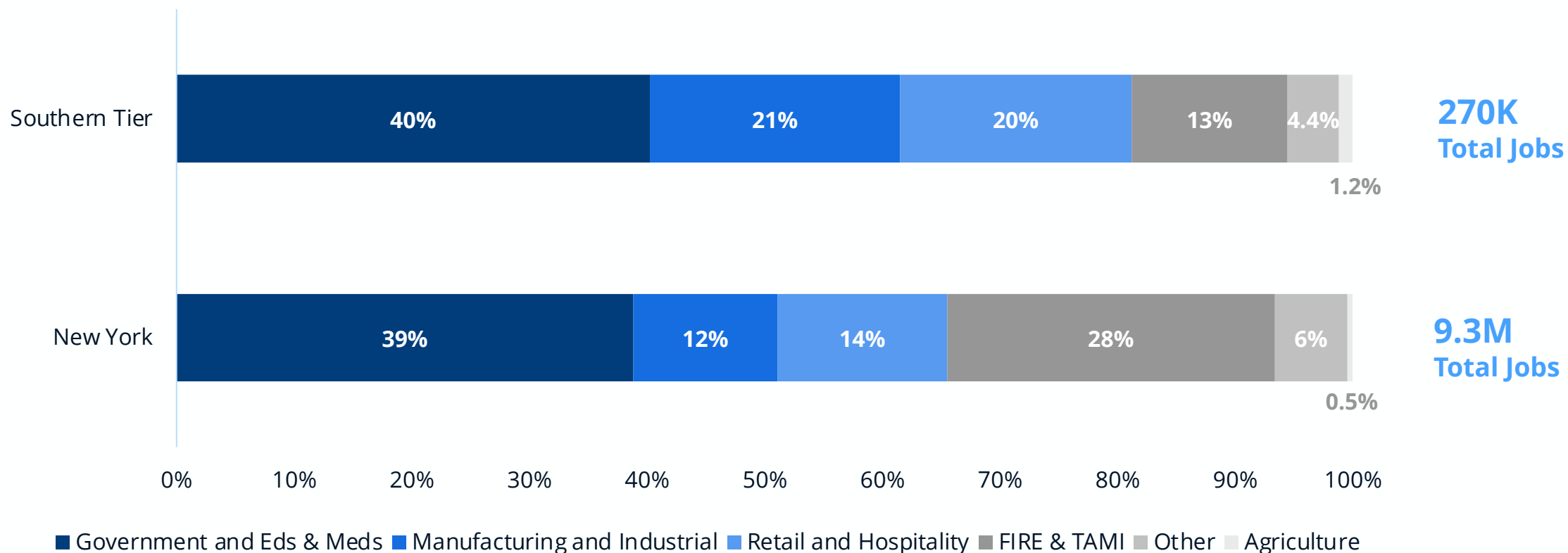


Source: HR&A analysis of BLS data (2011-2022)

SOUTHERN TIER TODAY

Today, the Southern Tier has high shares of government, education and medical care, manufacturing, retail, and hospitality jobs relative to the state as a whole.

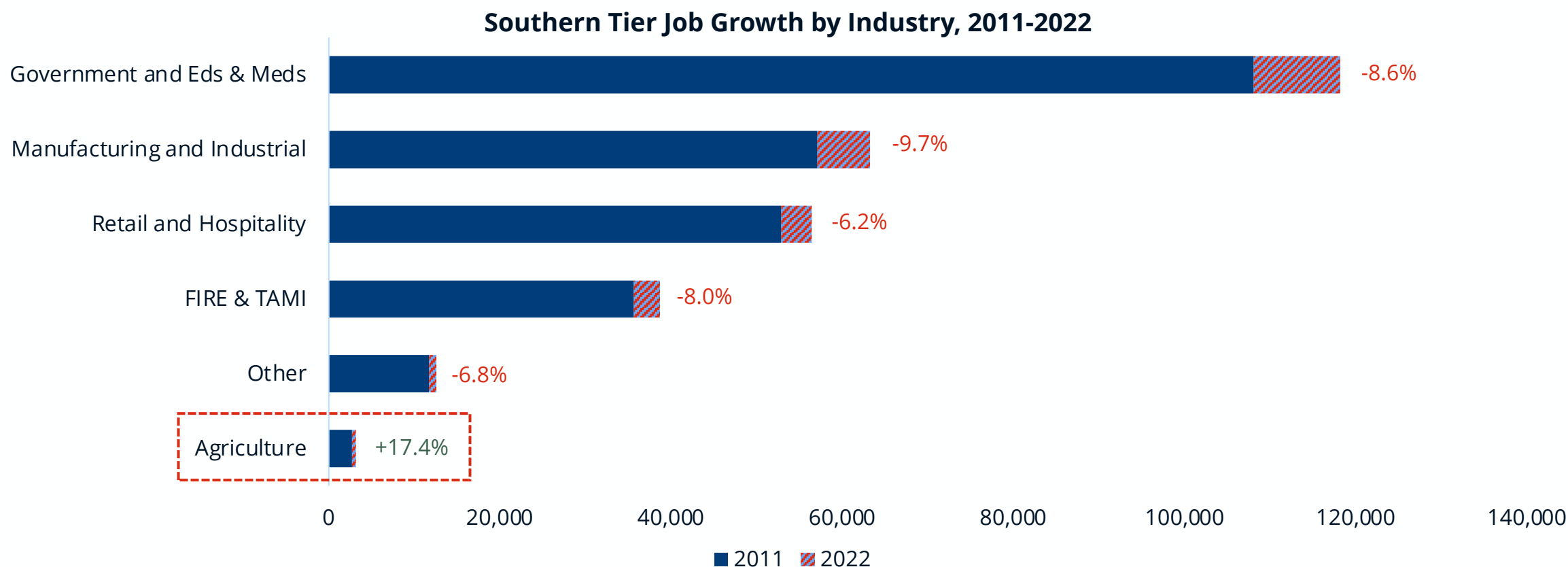
Distribution of Jobs by Sector, 2022



SOUTHERN TIER TODAY

Jobs **declined by 8%** in the Southern Tier from 2011 to 2022 – driven by the loss of government, manufacturing, and retail jobs.

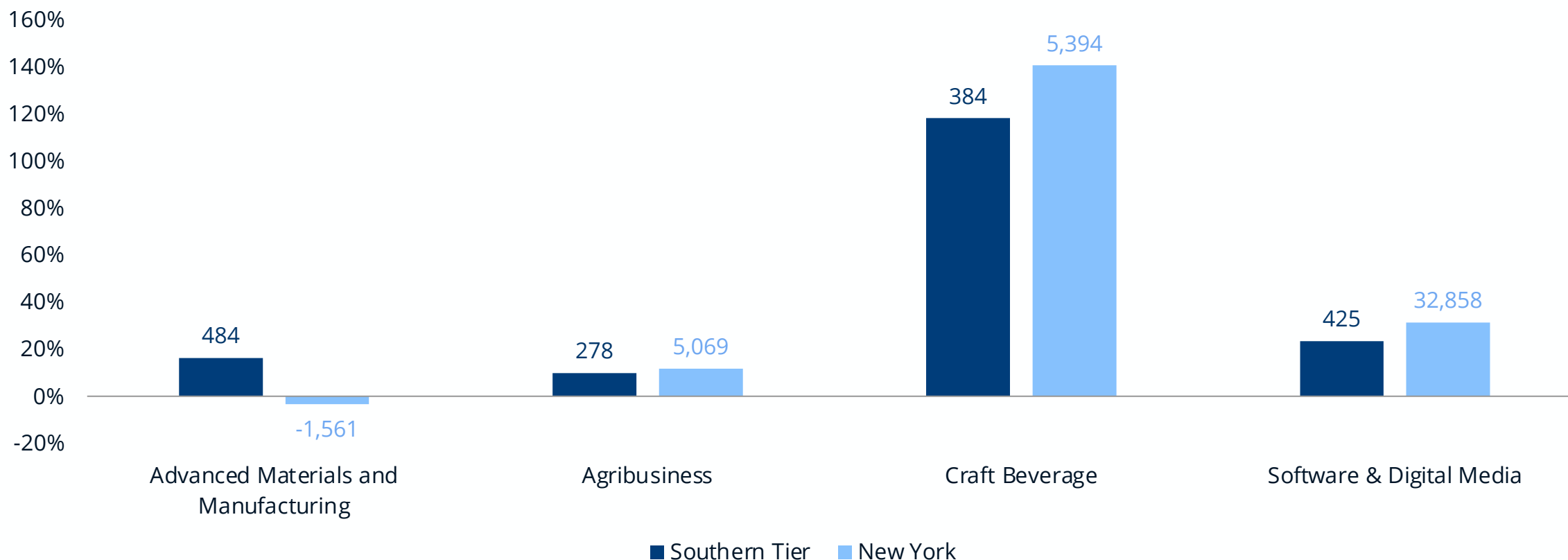
This reflects the shift away from the **dominance of the manufacturing industry** and declining overall population and associated demand for services.



SOUTHERN TIER TODAY

Jobs in key sectors that the REDC has identified as priorities in the past decade have grown almost at **pace with, or faster than, jobs statewide.**

Job Growth in Priority Sectors, 2011-2021

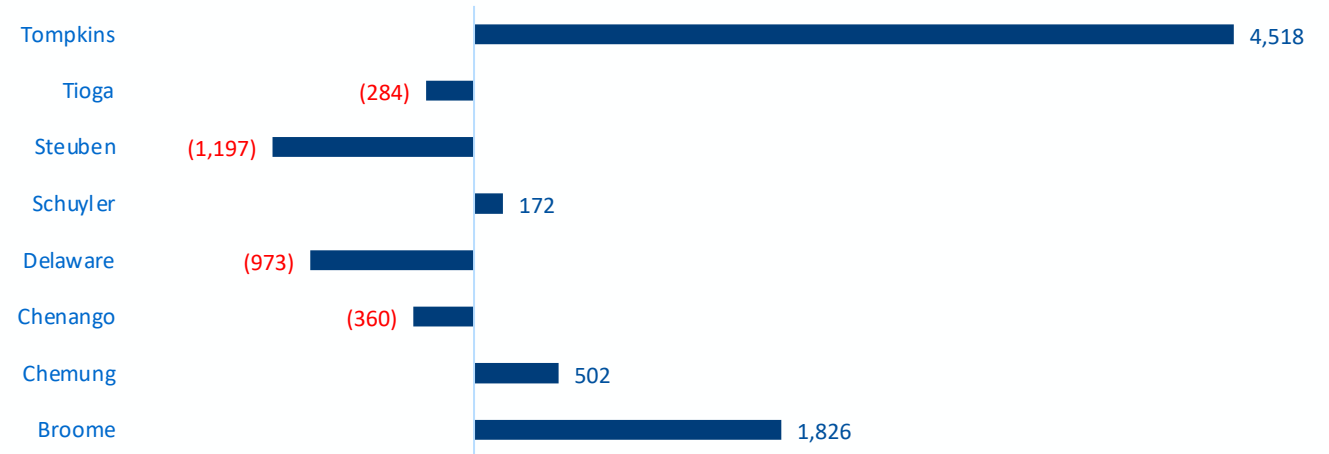


SOUTHERN TIER TODAY

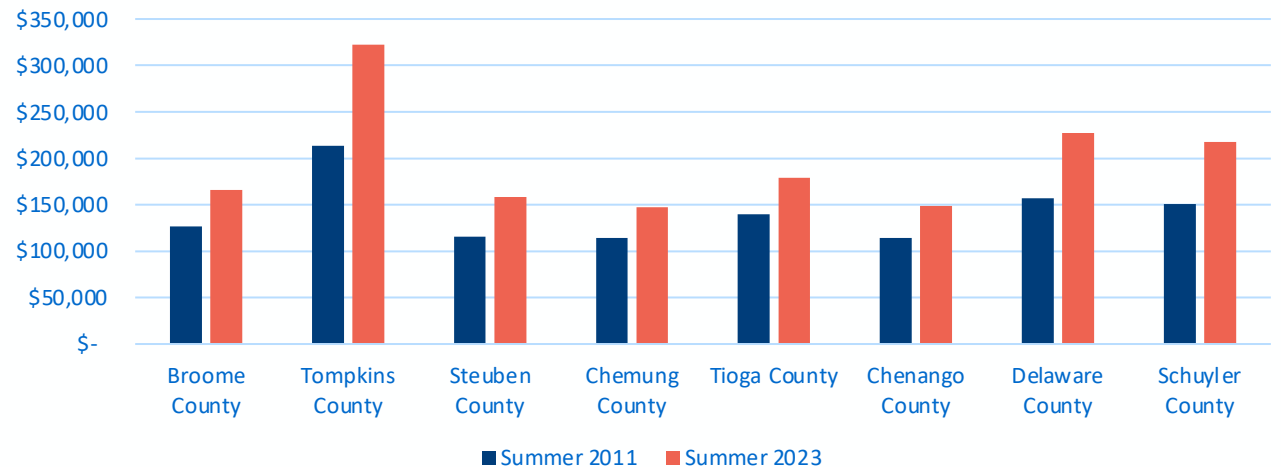
Persistent and New Challenges

- There is a **mismatch** between housing supply and demand.
- Housing unit growth occurred in **Tompkins, Broome, Chemung, and Schuyler** counties.
- There is **limited housing production** outside of a few urban centers.
- Housing affordability **reflects statewide trends** in rent growth, property value growth, and housing cost burden.
- Affordability trends vary with **some counties facing particularly acute affordability issues**.

Net Housing Units (2011-2021)



Change in Home Prices, Inflation Adjusted (2011-2023)



SOUTHERN TIER TODAY

REDC investment has generated meaningful benefits, and CFA projects are largely on track.

AWARDS

\$400M

Total CFA awards
since 2011

\$2.6B

Total project
value since 2011

PROJECTS

848

Projects funded
to date

82%

Projects
completed or
on track

JOB

3,776

Jobs created

31,143

Jobs retained

Regional Nodes & Priorities

- Southern Tier is a diverse region, and **each county differs** regarding demographic, economic, and housing trends, industry conditions, levels of investment, and **unique opportunities**.
- At a municipal level, the region includes centers for future investment and growth, including **Greater Binghamton, Ithaca, Elmira-Horseheads, Corning-Painted Post, and Hornell**.
- Several smaller communities are primed for investment and growth.

STRATEGIC PLAN PROCESS OVERVIEW

Vision Elements Attract Opportunities for the Future

- Projects and programs that **attract and retain talent, business, and cultural assets** have been largely successful.
- Workforce development partners, academic institutions, and anchor employers prepare regional workers.

1 Growing Population

Our **population and job base is growing**, with new households and businesses **relocating** and those who grow up and study in the region **staying or returning**.

Our workforce is ready to seize this opportunity, with **employer-informed training** at all skill levels and strengthened **coordination between universities and industry**.

2 Next Gen Industry

We have harnessed our **historic manufacturing** strength to become a **global leader in next-gen industries**, with thriving businesses in **cleantech, advanced manufacturing, and agribusiness**.

3 Great Place to Live

Our region is known statewide and nationally as **a great place to live and visit**, with a low cost of living, unmatched natural beauty, charming and historic downtowns, and easy access to job centers and nearby metro areas.

FIVE PILLARS OF REGIONAL INVESTMENT

Regional investment in the Southern Tier will be guided by the following **five pillars**:

Pillar 1 – Position the Southern Tier as a dynamic, **ever-evolving hub for cleantech**.

Pillar 2 – Foster the **resilience of regional industries** and nurture the emerging regional **innovation ecosystem**.

Pillar 3 – Make the Southern Tier a **great place to live** and embrace smart growth.

Pillar 4 – Grow a creative, adaptable, **future-ready workforce**.

Pillar 5 – Amplify the **Southern Tier story**.

Investment decisions across all pillars will also reflect our region's **core values**.

CORE SOUTHERN TIER VALUES

- **Equity** – Economic growth and physical planning will seek to benefit **all** Southern Tier communities and **narrow racial and geographic disparities**.
- **Diversity** – Strategies will respect that the region is made up of **many types of communities** that bring different strengths and require different approaches.
- **Sustainability** – The region's **natural environment is one of its greatest assets**; Investment will seek to preserve this asset.
- **Collaboration** – The region will work and **learn in partnership**, across the public and private sectors, across counties, and with other regions of the state.

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In Person – Break Out Stations: Regional Challenge Topics

Online – Facilitated Discussion of Regional Challenge Topics

Regional Challenge Proposal

What is the Regional Challenge Competition?

Regions were asked to select one of seven statewide priorities and identify the unique ways their region can address the challenge.

- Three regions in NYS will **receive up to \$10 million to meet the challenge selected.**
- Proposals *may* identify specific projects, but projects will be finalized with winning regions.
- Challenge topics are interconnected. Proposals may overlap with other topics, but **regions must identify one challenge topic to address.**
- The STREDC will focus on **Population & Talent Attraction, Development and Retention** as our Regional Challenge topic. Our proposal also includes aspects of **community revitalization, workforce development and housing.**
- We selected this challenge through a robust, **data-informed process** that analyzed **existing conditions and surveyed REDC members** with Council discussion and consideration of the other topic areas.

\$10M Regional Challenge Proposals will be evaluated on:

- **CHALLENGE VISION.** Is it realistic, actionable, innovative, equitable and inclusive? What is its **overall economic impact?**
- **EASE OF IMPLEMENTATION.** Does it enjoy strong public and partner support? Is it feasible? Can it scale up or down? Does it have a clear timeframe?
- **RESOURCES LEVERAGED.** Does it amplify the benefits of regional, public, private and non-profit investments? Are there clear partners for implementation?



REGIONAL CHALLENGE COMPETITION FOCUS AREAS

POPULATION & TALENT ATTRACTION, DEVELOPMENT AND RETENTION

The challenge focus areas provided by NYS that the Southern Tier REDC considered included:



Workforce

Ensure workers are able to **access jobs** in growing industries through **supports** such as transportation, training and wraparound services such as childcare.



Housing

Address the statewide housing crisis through investments that support residents' ability to attain **safe and affordable** housing.



Population & Talent Attraction/Retention

Ensure that communities offer an **environment** that draws new residents, with accessible job centers, sustainable infrastructure, and **vibrant, livable communities**.



Blight

Encourage growth and **infill** through the **restoration/** rehabilitation or elimination/**redevelopment** of blighted structures and properties.



Equity

Facilitate equitable **access to economic opportunity** through investment in previously disadvantaged/marginalized areas and support for MWBEs & BIPOC entrepreneurs.



Sustainability and Clean Energy

Implement measures to reduce **vehicular travel**, mitigate **sprawl**, and increase use of **renewable energy** sources to address statewide energy goals.



Tourism

Support the regional tourism industry through strategic investments in **critical tourism assets**.

POPULATION & TALENT ATTRACTION, DEVELOPMENT AND RETENTION

OUR CHALLENGE CHOICE: It's critical that the Southern Tier focus on **population & talent attraction, development, and retention** to meet its potential in the coming decade and beyond. **A sustainable future depends on the growth of our population** - other challenges and opportunities are either **supportive of or dependent on population**.

The Southern Tier:

- Is **rich in assets**, with world-class universities, natural beauty, and major employers that provide value to the region and State.
- Struggles to maintain and grow its population in the face of **global economic restructuring**:
 - **Population declined by 3%** between 2010-2020: steepest drop across all 10 NYS regions.
 - **Lost more than 11% of its labor force** since 2011: largest decline of any NYS region.
- Emerging industries like **advanced manufacturing and clean fuel/energy** underpin future economic development, supported by a \$63M federal Build Back Better award and Consolidated Funding Application (CFA) awards.

Seizing these opportunities requires rebuilding the region's population and labor force while simultaneously investing in existing communities.



The REDC Regional Challenge Award will spur growth in the region by:

1. Developing **local talent** through a broad range of **preK-20 education** and **state-of-the-art workforce training** programs focused on growing and stable industries.
2. Retaining **talented workers already in the region** using innovative techniques.
3. Attracting **new talent** in partnership with emerging and stable industries.
4. Creating a **high quality of life** in thriving Southern Tier communities to encourage residents to stay and to attract new residents to live, work and raise families.



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In Person – Break Out Stations: Regional Challenge Topics

Online – Facilitated Discussion of Regional Challenge Topics

Thanks to Claire, Chris and Allie who will lead the online discussion.

Online Discussion: Regional Challenge Proposal

Strategy: Cultivate Southern Tier communities as unique, desirable, and livable places.

GOAL: Create a high quality of life in thriving Southern Tier communities that encourages residents to stay and attracts new residents.

This strategy seeks to **nurture our communities**, building on their existing strengths to help them evolve into desirable, unique and authentic places.

Places that are open to fresh perspectives and have **magnetic properties to draw new residents**, making our communities stronger, **more diverse and more prosperous**.

POTENTIAL WAYS TO SUPPORT THIS STRATEGY:

- Develop housing at all price points
- Expand childcare
- Create accessible/walkable mixed-use downtowns
- Update land use codes
- Market the Southern Tier as a great place to live and work
- Support newcomers to resettle comfortably



What will help make our communities places that attract new residents and job seekers to LIVE, WORK, AND RAISE A FAMILY?



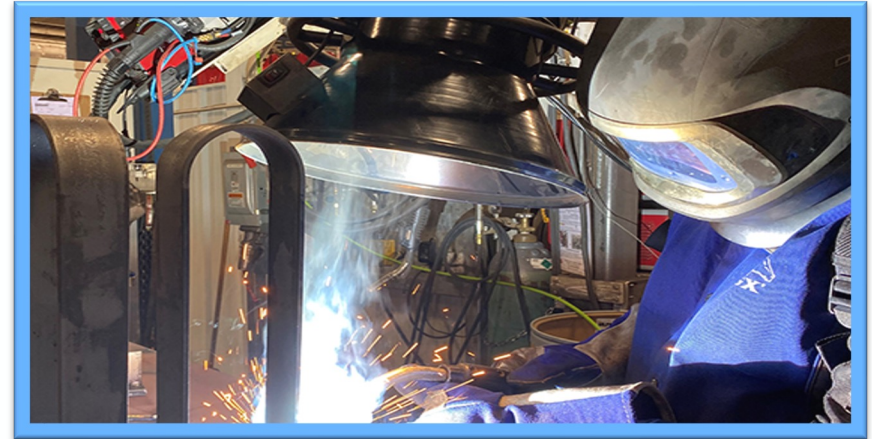
Online Discussion: Regional Challenge Proposal

Strategy: Establish a robust and adaptable workforce by developing local talent.

GOAL: Catalyze growth in the Southern Tier region by developing local talent and skill through a broad range of pre-K-20 education and state-of-the art workforce training programs.

POTENTIAL WAYS TO SUPPORT THIS STRATEGY:

- Help companies use virtual workforce training tools
- Help companies streamline hiring of qualified local workers
- Develop job readiness programs targeted to company needs
- Offer retraining stipends or incentives
- Provide funds for small farms including for equipment and cold storage
- Help minority, women and service-disabled owned businesses compete



How can we DEVELOP, TRAIN & SUPPORT local people to create a robust, adaptable workforce?



Online Discussion: Regional Challenge Proposal

Strategy: Retain talented workers in the region and attract new talent.

GOAL: Catalyze growth in the Southern Tier region by using innovative techniques to keep our talented workers here and simultaneously attract new workers in partnership with emerging and growing industries.

POTENTIAL WAYS TO SUPPORT THIS STRATEGY:

- Retain local college/university graduates
- Offer services to match interested workers with jobs
- Provide relocation incentives, such as moving expenses and help with spousal/partner employment
- Match workers with services like childcare
- Allow longer access to affordable student housing for retained graduates



What will incentivize talented workers to STAY LOCAL to live, work, and play? What will entice and ease barriers to help talented workers to RELOCATE?



NEXT STEPS

- Take the **community survey!**
www.surveymonkey.com/r/STREDC-2023-Survey



- Visit the **Southern Tier REDC website** for updates on plan progress at end of November:
<https://regionalcouncils.ny.gov/southern-tier>
- Reach out with **comments or questions:**
STREDC2023Strategy@gmail.com

Thank you!



Southern Tier Regional Economic Development Council (STREDC) Strategic Plan Update 2023



Help Shape the Strategic Plan! PUBLIC OPEN HOUSE

Please JOIN US from
5:30-7:30 PM
at a location near you:

*The Southern Tier REDC is updating its 2011 Strategic Plan to define a new vision for the economic future of our region and is competing for a **\$10 MILLION Regional Challenge Award.***

LECOM in ELMIRA, NY

Lake Erie College of Osteopathic Medicine

Lecture Hall 1
1 LECOM Place, Elmira, NY 14905 | **Oct. 18, 2023**

or Join by Zoom! Go to www.regionalcouncils.ny.gov/southern-tier

SUNY DELHI in DELHI, NY

Okun Theatre at SUNY DELHI
Farrell Student & Community Center
454 Delhi Dr., Delhi, NY 13753 | **Oct. 19, 2023**

or Join by Zoom! Go to www.regionalcouncils.ny.gov/southern-tier

ITC in VESTAL, NY

at Binghamton University

Innovative Technologies Complex (ITC)
Room ES 2008, 85 Murray Hill Rd, Vestal, NY 13850 | **Oct. 25, 2023**

or Join by Zoom! Go to www.regionalcouncils.ny.gov/southern-tier

TAKE A SHORT SURVEY!



Use the QR code to share your thoughts on economic development funding priorities across the Southern Tier region. Or visit:
www.surveymonkey.com/r/STREDC-2023-Survey

Visit ST REDC website at: www.regionalcouncils.ny.gov/southern-tier to stay up to date.
Contact us at STREDC2023Strategy@gmail.com for additional information or with questions or comments.