



PART ONE

Executive Summary and Progress

Executive Summary

MESSAGE FROM CO-CHAIRS

Dear Commissioner Hope Knight,

It is our privilege as Co-Chairs of the North Country Regional Economic Development Council to present you with the North Country Strategic Plan. Built on the work of the past decade, the North Country team has refined the strategies that will help our region lead the economic renaissance of New York State's small cities and rural communities. It reflects hours of work by dozens of volunteers, as well as the input of experts, stakeholders and the citizens of Northern New York.

Within, we propose – **Next Move NY** - a bold new initiative to expand our workforce, retain population and create the most robust transitioning soldier and spouse retention pipeline in the country. With the state's investment, over 46,000 transitioning soldiers and spouses from Fort Drum could substantially grow the workforce by making New York their next move!

We also seek to leverage our location to serve domestic and global markets, while growing and diversifying major industries.

We renew our focus on placemaking to create livable, attractive, and connected communities where people want to live and invest.

We identify opportunities to attract entrepreneurs and companies seeking to market emerging technologies and to create synergies between research, development, and commercialization.

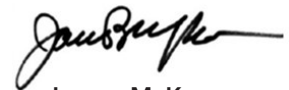
And we highlight the overarching necessity of affordable housing and provide a plan to address the challenge facing our communities.

The Regional Council initiative has provided a valued partnership with Empire State Development, Governor Hochul and New York State. We believe our success is New York State's success. We thank you for the collaboration and investment in the North Country's economic vitality and growth.

Sincerely,



Dr. Kathryn Morris
President
St. Lawrence University



James McKenna
President/CEO
Regional Office of
Sustainable Tourism



North Country REDC and partners at Fort Drum



Lake Ausable in Essex County

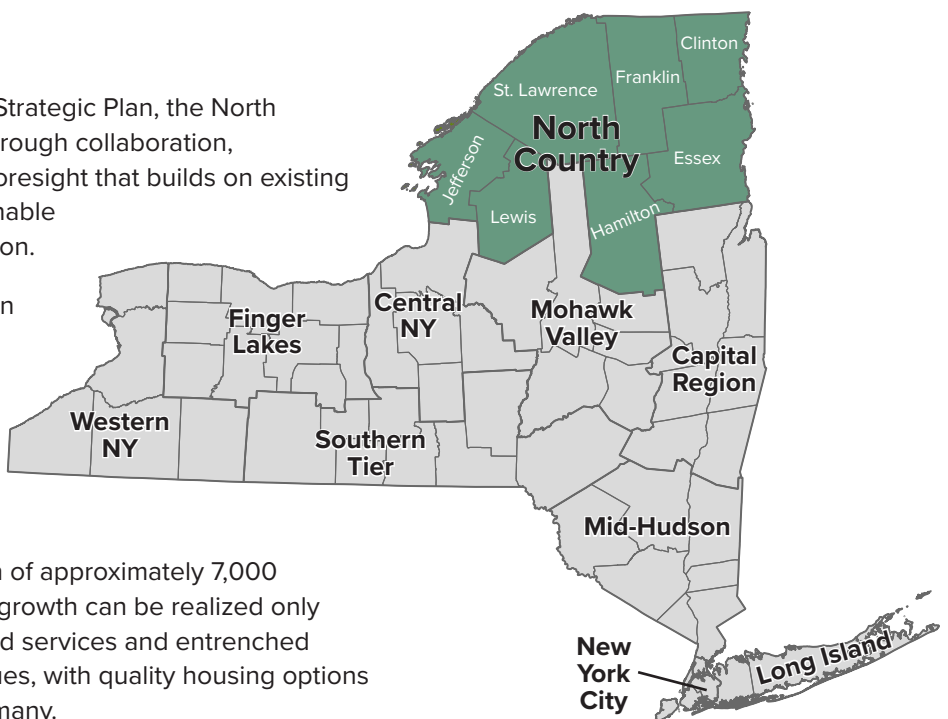
State of the Region

OVERVIEW

Since the 2011 Economic Development Strategic Plan, the North Country has seen exponential growth through collaboration, resourceful stewardship, and strategic foresight that builds on existing assets that will continue to foster sustainable development and prosperity for the region.

The North Country has proven resilient in the face of economic and demographic challenges of the past decade and is poised for an economic renaissance in the years ahead.

Population declines over the past decade are expected to reverse in the future with projections indicating growth of approximately 7,000 people by 2027. Yet the promise of this growth can be realized only through addressing needed wrap-around services and entrenched housing availability and affordability issues, with quality housing options becoming increasingly out of reach for many.



The region had been experiencing a rebound in jobs when the COVID-19 pandemic struck, but the North Country has emerged on a positive trajectory gaining jobs consistently since 2021. The region is expected to continue this strong rebound with nearly 10% job growth over the next five years accounting for nearly 17,000 new jobs.

This strong job growth, coupled with a wave of anticipated retirements, will drive unprecedented workforce needs. With regional unemployment near record lows, meeting workforce needs is an urgent priority across the North Country.

SUCCESSFUL PROJECT HIGHLIGHTS

This has been a tremendous year for the North Country. We have seen numerous projects come to fruition, fulfilling our vision. The following success stories exemplify the power and impact of effective past strategic endeavors and demonstrate **there is much momentum to build upon in the region.**

- In January 2023, the North Country hosted the **Lake Placid 2023 FISU World University Games**. Governor Kathy Hochul welcomed 1,443 collegiate athletes from more than 540 universities and 46 nations. This biennial multi-winter sporting event featured competition in 12 winter sports and 85 events in venues throughout the Adirondack North Country in Lake Placid as well as Wilmington, Saranac Lake, Potsdam, Canton, and North Creek.
- Combined, projects were supported by more than \$10 million in Upstate Revitalization Initiative funds from Empire State Development (ESD) through the North Country Regional Economic Development Council, including a nearly **\$7 million upgrade project at Saranac Lake Civic Center in Franklin County**. The year-round, not-for-profit recreation and events facility underwent significant interior and exterior improvements to play host to the international curling competition.
- **Construction on Citizen Advocate's Harrison Place in the Village of Malone** is nearing completion. This \$22 million mixed-use development creates 40 new affordable apartments and five commercial spaces right downtown. The complex replaces a row of blighted buildings on Main Street and was made possible in part by a \$445,000 North Country

Regional Economic Development Council (NCREDC) award through ESD.

- **CWT broke ground on its \$16 million CWT Farms International state-of-the-art chick hatchery in Watertown, Jefferson County.** For more than 60 years, CWT has produced high standard broiler hatching eggs for its global customer base. This new 50,000 SF hatchery,



Lake Placid 2023 FISU World University Games at Mt. Van Hoevenberg



Harrison Place in the Village of Malone

located at the Thousand Islands International Agriculture and Business Park in Jefferson County, will be the **largest hatchery in New York State and is expected to create 20 new full-time jobs**. To encourage this project's success and job creation goals, the NCREDC recommended a \$1 million ESD capital grant and up to \$500,000 in performance-based Excelsior Jobs Program tax credits. **Additionally, this will be the first agriculture production company in the new Thousand Islands Agriculture and Business Park, which was also supported with a \$500,000 ESD capital grant recommended by the NCREDC.**

- The new **\$27.5 million Watertown Family YMCA in Jefferson County** will hold a grand opening this year. The new facility repurposed a vacant, 89,000 SF building in the heart of downtown and converted it into a new family wellness, aquatics, and fitness center. Through the NCREDC, **Empire State Development provided a \$3.6 million capital grant** to assist with construction and rehabilitation costs for the new facility, adding to the \$10 million DRI investment in downtown Watertown.



Co-Chair James McKenna (center) tours progress at the new Watertown YMCA project with Denise Young and Danielle King

- **Dual Development completed its \$26.3 million project to demolish an outdated hotel in North Elba and construct a new 102,935 SF hotel in its place.** The new hotel has 185 guest rooms ranging from studio to two bed bridal suites. **The new hotel was supported with a \$3 million ESD Capital Grant through the NCREDC and will create 51 new full-time jobs.**



Fort Ticonderoga in Essex County

ECONOMIC HEALTH OF THE REGION

The discovery phase of this strategic planning process included research and analysis of economic and demographic data combined with a robust stakeholder

engagement process. The health of the region informed the vision, goals, and strategies of each work group and determined opportunity areas of growth.

Demographics



Population
422,537

- The North Country's population is projected to see **a turnaround from historical decline**.
- The North Country's population shrank **from 437,121 in 2012 to 422,537 in 2022**.
- The region is expected to **grow to 429,545 residents by 2027**.



Race & Ethnicity
12%
BIPOC share of
the population

- North Country is **less racially diverse** than the state or the nation.
- The region's population has a relatively small populations identifying as White, Hispanic (3%), Black, Non-Hispanic (4%), and Two or More Races, Non-Hispanic (2%).



Median Annual
Household
Income
\$59,537

- Approximately **52% of the households in the North Country are considered middle class**, earning between \$50,000 and \$150,000.
- Approximately 22% of households make between \$50,000 and \$74,999.



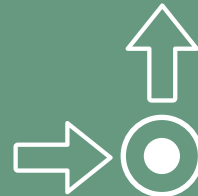
Age
39.5

- **8% of the population is aged 20–24**, likely due to higher education institutions and Fort Drum.
- 36% of the population are between the ages of 25 and 54.
- A **relatively high share of the population is approaching retirement**, with 25% of the population between the ages of 55 and 74.



Educational
Attainment
24.2%
have a bachelor's
degree or higher

- The North Country region has **higher shares of the population** than the state or US **completing only high school as well as completing an associate's degree**.
- The region is below the state and nation for the share completing a bachelor's degree or higher.



Migration
-3,300

- From 2016 to 2020, the North Country averaged a **net migration loss of about -3,300 residents per year**.
- The most popular destination for outbound migrants from the North Country is Onondaga County, NY (which accounted for 26% of migration in 2020).

Economy



Jobs
175,342

- The economy has been contracting but is **expected to rebound and grow**.
- The region lost 7,241 jobs since 2017 (-4.0%) in Health Care and Social Assistance, Retail, Educational Services, and Government.
- Employment has been growing since the pandemic-induced drop in 2020, adding almost 4,900 jobs.



GRP
\$23.1 billion

- The North Country's gross regional product (GRP) **grew by 29% between 2017 and 2022**, to over \$23.1 billion.
- The main contributors were Government, which generated one-third of the growth, Retail Trade (10%), and Manufacturing (9%).



Job Growth
9.4%
projected growth
by 2027

- Over the next five years, the region is projected to **grow significantly, adding roughly 16,500 jobs** by 2027 (9.4%).
- Growth will be primarily in Government (+3,637), Health Care and Social Assistance (2,489), Manufacturing (2,086), and Accommodation and Food Services (2,034).



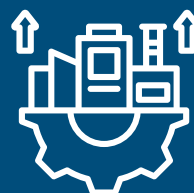
Poverty Rate
14.2%
in 2021

- Since 2018, the North Country has seen **declines in the poverty rate from 15.2% to 14.2%**.
- Approximately 20.3% of the population in poverty are people less than 18 years old.



Average Earnings
\$69,311

- Average earnings in the North Country are over \$11,000 below the national average and more than \$30,000 below the statewide average (which are likely skewed by New York City).
- Between 2017 and 2022, **average wages grew faster in the North Country (up 29%)** than in the state (27%) or the nation (26%).



Top Sectors
Driving Growth
2017-2022

- Transportation and Warehousing (+562 jobs)
- Construction (+346 jobs)
- Administrative and Support and Waste Management and Remediation Services (+296 jobs)
- Professional, Scientific, and Technical Services (+269 jobs)

Labor Force



Unemployment
3.9%

- Unemployment trends in the North Country mirrored those of the state and country over the last 10 years, aside from a small spike in 2017.
- From 2020 to the present, the North Country's **unemployment rate has been significantly lower than the state's and often lower than in the US.**



Net Commuters
-3,908
in 2021

- **The region exports workers.**
- 3,157 workers commuted into the North Country from residences outside the region.
- 7,065 residents commuted to jobs outside the region, for a net out-commuting flow of 3,908 workers.



Labor Force
184,425
in 2021

- The North Country has seen **declines in labor force participation rates since 2012.**
- The labor force participation rate decreased since 2012 from 55.9% to 53.3% in 2021. However, the participation rate slowly recovered from the 2019 dip of 51.5%.



Projected
Workforce Gap
48,046
in 2022-2032

- Over the next 10 years, the North Country's labor force is expected to decline by over 17,500 workers, driven by retirements and demographics.
- Based on shifting demographics and potential job growth, the projected workforce gap is 48,046.



Health Insurance
4.9%
of the population
has no coverage

Since 2012, the population without health insurance has declined dramatically from 9.9% in 2012 to 4.9% in 2021.



Visitor Spending
\$1.6 million

- From 2019-2021, **visitor spending has increased by 124%.**
- In 2019, visitor spending was approximately \$1.3 million dollars and increased over the past three years to approximately \$1.6 million.















St. Lawrence River Locks in Massena

Status of Past CFA Projects

Overview of Previously Funded Priority Projects

SUMMARY STATUS OF PAST PRIORITY PROJECTS BY ROUND

Status	Round I	Round II	Round III	Round IV	Round V	Round VI	Round VII	Round VIII	Round IX	Round XI	Round XII	Total
	7	11	6	2	5	12	2	1	2	-	-	48
	-	-	1	3	2	1	4	2	5	9	2	29
	1	-	-	-	-	1	1	1	1	1	-	6
	-	-	-	-	-	-	-	-	-	-	-	0
	-	-	-	-	-	-	-	1	-	-	-	1
	2	5	4	1	5	8	8	3	2	1	-	39
Total	10	16	11	6	12	22	15	8	10	11	2	123

-  Project is complete
-  Project is on schedule
-  Project is progressing more slowly than anticipated
-  Project concerns need to be resolved
-  Project contract not yet executed
-  Project canceled or funding declined

LEVERAGE OF STATE INVESTMENT IN ALL PAST PRIORITY PROJECTS

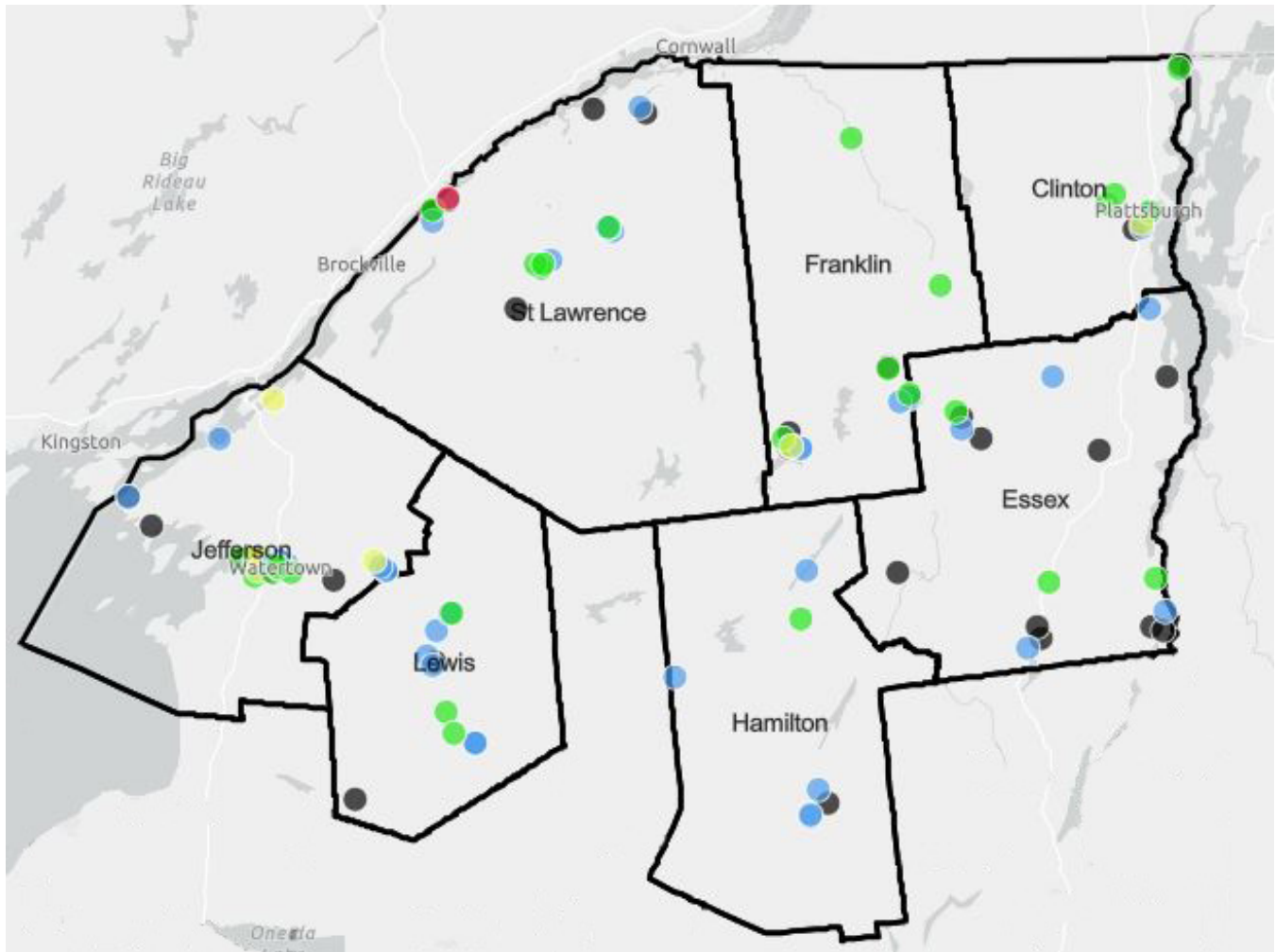
The table below lists the ratio of the total investment in past priority projects to the state investment over Rounds I through XII of the REDC.

Round	Total Number of Priority Projects	Total Amount of Priority Project Awards	Total Project Cost	Ratio of Award Amounts to Total Project Cost
Round I	8	\$12,802,000	\$132,352,444	1:10.34
Round II	11	\$13,962,306	\$51,805,029	1:3.71
Round III	7	\$14,348,999	\$105,977,879	1:7.39
Round IV	5	\$8,815,000	\$45,390,489	1:5.15
Round V	7	\$6,330,000	\$31,745,792	1:5.02
Round VI	14	\$2,682,542	\$16,280,899	1:6.07
Round VII	7	\$3,409,000	\$16,274,824	1:4.77
Round VIII	5	\$5,257,000	\$95,875,716	1:18.24
Round IX	8	\$8,032,849	\$64,914,108	1:8.08
Round XI	10	\$12,766,610	\$91,901,076	1:7.2
Round XII	2	\$290,000	\$1,450,000	1:5
Total	84	\$88,696,306	\$653,968,256	1:7.37

Project data is updated through October 2023. For additional analysis and full appendix of all projects, please visit <https://regionalcouncils.ny.gov/north-country> to view the Project Tracking Dashboard.

GEOGRAPHIC DISTRIBUTION OF PAST PRIORITY PROJECTS

- Project is complete
- Project is on schedule
- Project is progressing more slowly than anticipated
- Project concerns need to be resolved
- Project contract not yet executed
- Project canceled or funding declined















Overview of All Previously Funded CFA Projects

SUMMARY STATUS OF ALL PAST PROJECTS

Since the REDC's inception twelve years ago, 862 projects have been awarded funding through the CFA process. New York has invested more than \$331 million in state funding, leveraging over \$1.4 billion in private and other public investment in the North Country. To date, all projects are expected to create or retain over 6,200 jobs.

Of the total CFA projects awarded, 85% are complete or on schedule, while 13% have stalled or withdrawn as economic conditions have changed. Additionally, 68% of the NCREDC's Priority Projects are complete or on schedule. The NCREDC will continue to prioritize projects that meet its strategic goals for future economic growth and development.

Status	Round I	Round II	Round III	Round IV	Round V	Round VI	Round VII	Round VIII	Round IX	Round XI	Round XII	Total
	63	69	73	57	60	53	43	31	33	3	1	486
	1	1	3	4	9	14	27	35	49	97	14	254
	1	1	1	-	-	2	2	1	2	1	-	11
	-	-	-	-	-	-	1	-	-	-	4	5
	-	-	-	-	-	-	-	1	-	-	-	1
	11	13	13	10	13	16	13	7	4	3	2	105
Total	76	84	90	71	82	85	86	75	88	104	21	862

-  Project is complete
-  Project concerns need to be resolved
-  Project is on schedule
-  Project contract not yet executed
-  Project is progressing more slowly than anticipated
-  Project canceled or funding declined

LEVERAGE OF STATE INVESTMENT IN ALL CFA PROJECTS

Round	Total # of Awards	Total Amount of All CFA Awards	Total Project Cost	Ratio of Award Amount to Total Project Cost
Round I	65	\$44,595,173	\$216,381,909	1:4.85
Round II	71	\$29,766,975	\$104,552,829	1:3.51
Round III	77	\$36,364,943	\$201,658,111	1:5.55
Round IV	61	\$20,953,897	\$77,135,915	1:3.68
Round V	69	\$20,507,926	\$98,540,838	1:4.81
Round VI	69	\$21,419,775	\$102,664,826	1:4.79
Round VII	73	\$26,937,261	\$91,874,272	1:3.41
Round VIII	68	\$24,489,720	\$175,466,727	1:7.16
Round IX	84	\$32,889,221	\$167,053,360	1:5.08
Round XI	101	\$68,679,026	\$202,011,214	1:2.94
Round XII	19	\$4,613,594	\$16,255,867	1:3.52
Total	757	\$331,217,511	\$1,453,595,867	1:4.39

JOB CREATION IN ALL CFA PROJECTS

The table below lists the total number of permanent jobs retained and created through the CFA.

Round	Projected Jobs Created	Projected Jobs Retained	Total
Round I	267	377	644
Round II	70	751	821
Round III	215	380	595
Round IV	213	176	389
Round V	78	135	213
Round VI	244	416	660
Round VII	204	554	758
Round VIII	121	695	816
Round IX	215	479	694
Round XI	151	456	607
Round XII	8	73	81
Total	1786	4492	6278