
Chenango County, New York Economic Development Strategic Plan

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Acknowledgments

The Chenango County Economic Development Strategic Plan Advisory Committee would like to recognize and thank the many people and organizations whose assistance has made the completion of the Plan a reality. In addition, the Committee would like to thank the residents, business owners, and property owners of the County who took part in the meetings through attendance and responding to the various surveys and questionnaires that were distributed.

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Funding partially provided by Governor's Office for Small Cities

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Executive Summary

The Development of the Economic Development Strategic Plan

An Economic Development Strategic Plan identifies the goals and strategies by which a community looks to achieve not only sustainable economic viability in a competitive regional market, but also economic growth to meet the future needs of both its residents and businesses. This Economic Development Strategic Plan, focusing on the local and regional economic climate, will act as a guide or “blueprint” for the future of Chenango County.

The development of the Chenango County Economic Development Strategic Plan began in 2005, when the Chenango County Chamber of Commerce issued a Request for Proposals. Funding for developing the Plan was obtained from the New York State (NYS) Governor’s Office for Small Cities (GOSC) Technical Assistance Grants. This Plan is part of a larger effort occurring within the County to develop a Countywide strategic plan.

The intent behind developing an Economic Development Strategic Plan was focused primarily on three objectives:

- Create a plan that reflects the current priorities, needs, and resources of the County;
- Identify critical changes, challenges, and threats effecting the economy of the County; and
- Establish an action plan that effectively coordinates efforts to consolidate efforts and the financial burden.

Introduction

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. Chenango County is approximately 899 square miles with a population of 51,401 in 2000, according to the U.S. Decennial Census. The County is predominately rural and comprised of 21 towns, 8 villages, and one city. The County Seat in Chenango County is the City of Norwich with 7,355 residents.

Public Participation

Representatives from local businesses, industries, institutions, and government agencies participated in the development of the Economic Development Strategic Plan. 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 report drafts.

Site Visits

Over the course of four days, the planning consultants conducted two County driving tours, one full day of factory visits, and one full day attending the 2005 Agriculture Summit IV. These Chenango County site visits provided invaluable guidance to the planning consultants on how to move forward in developing the County's Economic Development Strategic Plan. In addition to the site visits and driving tours, the planning consultants conducted many telephone interviews of stakeholders.

Business Questionnaire

As part of the public participation effort, invitation letters and stakeholder questionnaires were sent to approximately 110 Chamber of Commerce members, Chenango County Area Corporation members, and other area business representatives. The questionnaire respondents characterized the local business climate today – in 2005 – as compared to 1995, as “challenging” or “improving.” The decline of the 18-35 year old population, coupled with increasing taxes, regulations, and energy costs were cited as causes of concern.

Participants' response to potential marketing opportunities included further penetration of existing markets to expanding outside the existing market to growth in international markets. When asked how the County could enhance economic viability, participants identified tax relief as one mechanism, possibly through the consolidation of local municipal and County services. Participants encouraged further examination of potential markets, which included microbusiness and cottage industry growth, natural resources/outdoor activities, in-County wood processing and product manufacturing, pharmaceuticals, and the creative arts.

SWOT Analysis

Three public workshops focusing on the local economy were conducted as part of the planning process. The intent behind the workshops were to inform participants of the history behind the planning process and to identify the community aspects that would be addressed within the scope of the Countywide Economic Development Strategic Plan. The three economic workshops used a common strategic planning technique known as a S.W.O.T. (strengths, weaknesses, opportunities, and threats) analysis.

Strengths focused on quality of life, labor, business, and geography in Chenango County. The participants described the county as having a strong sense of community and family values, low-crime rate, recreation and cultural attributes, affordable housing, and a low cost-of-living. One important resource, local labor force, included work experiences, skills, and talents. Local investment opportunities, economic development programs, and financial support were all identified as local economy strengths that support business growth. Natural resources included the County's available land, natural gas, and rural beauty.

The main weaknesses identified were labor force, followed by quality of life, political atmosphere, infrastructure, and existing businesses. Three major labor topics mentioned were labor incentives, employee retention, and training resources. The local political scene's lack of collaborative efforts results in parochialism, isolation, and fear of loss of political stature. Another political weakness is the

disconnection between the County's businesses and educational institutions. Identified transportation weaknesses included the lack of interstate access for most of the County, high transportation costs, limited public transportation, and the inadequacies of NYS Route 12. A lack of municipally-served "shovel ready" sites and high energy costs were also identified as infrastructure weaknesses.

Suggested opportunities included developing new economic development programs, providing for additional education and training, enhancing available lands with infrastructure, and marketing the County. Strengthening local human resource networks, supporting local reinvestment, and rehabilitating abandoned properties were several identified opportunities. Other measures focused on building on the County's educational institutions and alumni. Participants also expressed a need for the County to identify just who/what it would like to market to and then strengthen those efforts.

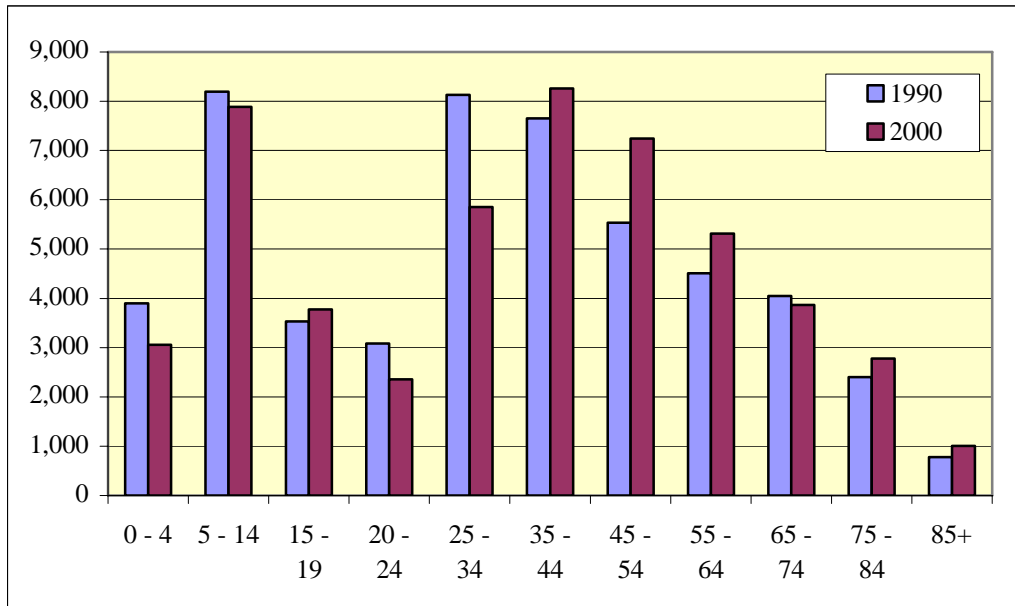
Threats were identified in two major categories: internal and external threats. The primary internal threats included local politics and quality of life factors. Other secondary threats identified influences included: business, education, labor force, infrastructure, and costs of products. An identified internal threat in Chenango County is the political atmosphere where lack of municipal cooperation often prevents countywide planning. Infrastructure threats include the lack of "shovel-ready" sites, complicated permitting processes, and deteriorating housing stock. External threats are influences outside of Chenango County that interfere with economic development and growth. Cost of products, politics, and global competition are considered major external threats to Chenango County.

Demographic Profile:

Concurrent with the public planning process described above, the planning consultants conducted an inventory and analysis of Chenango County's economy. Using demographic data from the U.S. Census Bureau, as well as the New York State Department of Labor, the New York State Department of Agriculture and Markets, and ESRI Business Information Solutions (a data service provider), a community profile of Chenango County was developed. A number of other plans and reports were examined to identify any regional trends that might have an impact on the County's economic future.

Between 1990 and 2000 the population of Chenango County decreased by .7%, from 51,768 in 1990 to 51,401 in 2000. From 1990 to 2000, Chenango County experienced significant population declines in the 0 to 5 and 20 to 34 age groups. The largest population increase occurred in the age group 45 to 54, and the median age in Chenango County is 38.4 years.

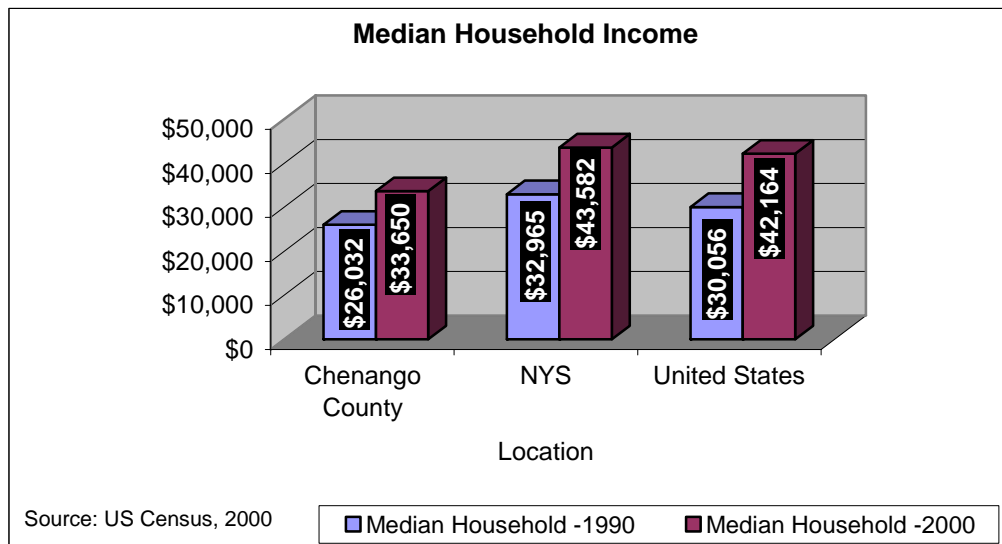
Population by Age Group 1990 – 2000



Source: U.S. Census Bureau, 1990, 2000.

National trends have indicated that more individuals are attaining higher levels of education, while the number of individuals having only a high school education or less has been steadily decreasing. Eighty percent of Chenango County’s residents 25 years and older have at least a high school diploma. Accordingly, 43.7% have some college, but only 14% have received a bachelor’s degree or higher. 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 of education.

Chenango County’s median household income, at \$33,650 in 2000, is significantly lower than the U. S. and New York State medians. Chenango County has a higher share of households’ earnings less than \$34,999 when compared to the U.S. or the State. This explains the County’s lower median household income at \$33,650 relative to the State at \$43,582, and U.S. at \$42,164.



Chenango County jobs are in education, health, and social services industry at 24% of total jobs, manufacturing at 21% of total jobs, and retail at 11% of total jobs. In 2000, these top three ranking industries made up approximately 55% of total employment held in Chenango County. These industries are also the top three industry sectors for the United States in 2000.

Community Resources Inventory:

Following the demographic analysis, the next step in the planning process examined the existing conditions, trends, and resources that contribute to Chenango County economic base. The topics examined in the community resources inventory included transportation, employment centers, educational resources, historic resources, tourism resources, New York State Lands, natural resources, and commercial real estate. These community resources were researched in response to input from the public. The intent behind this section is to identify community assets and discuss their current economic potential.

Highlights of Specific Community Resources:

- Agriculture products, organizations, and history;
- Public and private forests;
- Agritourism;
- Alternative energy resources;
- Air, land, and rail transportation services;
- Employment organizations and centers;
- Historical canals, buildings, districts, and societies; and
- Cultural resources and tourism services.

Economic Industry Analysis:

The Chenango County Economic Development Strategic Plan 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 on the County.

Two major economic analysis techniques, location quotient and shift-share analysis, are used to cast 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 a 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 allowed 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.

Economic Profile:

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 Tourism Map is a "snap shot" of tourism activities. An expanded Tourism map should be developed for promotional purposes.

Agriculture

Historically, farming has been a profitable business, despite the occasional inclement weather and other challenges. Chenango County is ranked 10th in New York State for dairy. Their primary forages grown are corn silage and hay/haylage. Agriculture is one of the most dominant industries and land uses in Chenango County.

Increased competition in recent years has resulted in very tight profit margins, often with profits not making it to the farmer level. As with many Upstate New York communities that continue to have

agriculture as a major element of the local economy, the survival and strength of the local farming industry is very important in Chenango County. The County's farmers contribute substantially towards the local economy, as agriculture's economic multiplier is often higher than other local businesses. Access to capital is a primary problem confronting most farmers, as inability to invest in upgrades hinders the ability to improve profit margins. Recognizing that farms are small businesses and that agriculture is an industry that must and should be supported, financial resources should be made available to local farmers via business assistance programs.

Manufacturing

Similar to National trends, 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% or 768 jobs.

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. These firms offer machine shop and fabrication services to non-local markets. Many of these companies, and other more specialized firms, have capabilities in various aerospace-related fields.

Along with other manufacturing companies in Chenango County, the wood products industry plays a role in Chenango County employment. This industry includes logging, sawmills, and planing mills, hardwood flooring, millwork, wood pallets and skids, prefab wood buildings, wood preserving, and partitions and fixtures.

Services

Tourism

A successful tourism development approach must be multi-faceted. By enhancing their community's attractions and highlighting their unique qualities, tourism developers market their areas to attract guests; create products to encourage lingering; and develop leisure activities to keep guests busy, all the while infusing dollars into the local economy.

There are multiple organizations and websites that promote Chenango County's tourist activities. Chenango County is part of New York State's Leatherstocking Region. The Leatherstocking Region developed theme-oriented Trip Kits for the area covering activities from sports hall of fames to eating establishments to wineries. The Chenango County Chamber of Commerce provides information on tourism resources on its website, as well as through its printed promotional materials and brochures. Chenango County sponsors a tourism website which provides information on area attractions, community websites, historical information, recreation, and lodging information. NBT Bank sponsors a tourism

promotion website at www.tourismtrail.com. The trail promoted via the website is a 200-mile pass through rural area's of New York State's Leatherstocking Region and the Southern Tier, promoting seven major attractions. Some towns and villages in Chenango County and local Chambers of Commerce provide local tourist attractions.

Health Care and Social Assistance

Health Care Services is a growing concern throughout the U.S., especially in areas, such as Chenango County, where the population aged 55 and over is growing and increasingly comprises a larger portion of the population. According to the 2000 Census, 25% of the County's population was over 55. This will continue to be the case as the County's population continues to age.

Of 106 Health Care and Social Assistance establishments located in Chenango County in 2003, 50% provided Ambulatory Health Care Services, while 35% provided Social Assistance. The 139-bed Chenango Memorial Hospital, the only hospital in the County, is one of the largest employers in the City of Norwich, employing 600 in 2005.

In 2003, there were 15 establishments that were categorized as Nursing and Residential Care Facilities, comprising 14% of all Health Care establishments. These establishments employed 429 or 24% of all Health Care and Social Assistance-related employment in the County.

Retail Market Analysis

In 2002, there were 1,700 retail establishments located within the Southern Tier East Region (Broome, Chenango, Cortland, Delaware, Schoharie, and Tioga Counties), estimating an annual payroll of \$366 million and employing over 21,000 workers, according to the 2002 Census of Retail Trade. Chenango County accounted for approximately 10% of the region's total retail sales in 2002.

Within the six county region, Chenango County ranked fourth in terms of number of retail establishments per capita in 2000. With a generally localized retail environment, Chenango County retailers consist of specialty stores, antique shops, and other small-scale establishments. There were approximately 190 retail establishments in Chenango County in 2003.

The most significant retail hub is in the City of Norwich, also the largest community in Chenango County. One area, in particular, that experienced substantial growth is the Route 12 corridor in the Town of Norwich, just south of the City of Norwich. Within Norwich along Route 12 (a north-south thoroughfare traversing the City), there are a number of National retailers, several health and personal care stores, women's apparel shops, and discount stores, among others. According to the Southern Tier East Region Planning Development Board, a substantial portion of the retail increase is from a series of shopping centers in the Town of Norwich.

Retail Surplus and Leakage

The difference between what local residents buy and what local retailers sell is referred to as “leakage” – if residents are buying more than what is sold locally, they therefore must be traveling outside the local area to shop. This indicates a “leakage” of local dollars outside the area. A “Surplus” is when residents are purchasing less than the amount actually being sold in the area. This would indicate that local retailers are attracting shoppers from outside the local area. The retail surplus and leakage information is culled from ESRI Business Information Solutions¹.

Chenango County retail sectors experiencing surpluses and potentially attracting shoppers from outside Chenango County are the following:

- Health and Personal Care Stores;
- Beer, Wine, & Liquor;
- Books, Periodical, and Music Stores; and
- Sporting Goods/Hobby/Musical Instrument Stores.

According to ESRI Business Information Solutions, there are several under-represented retail sectors in the County, forcing residents to drive outside the County to make many of these purchases, causing a leakage of local dollars. Listed below are top five under-represented retail sectors in Chenango County:

- Full Service Restaurants;
- Gasoline Stations;
- Food Service & Drinking Places;
- Motor Vehicle & Parts Dealers; and
- Automobile Dealers.

Economic Development Tools:

This section identifies the potential funding sources that include a variety of federal, state, local, and private organizations. In the current public finance climate in Chenango County, less funding are being allocated to economic development activities. This part of the Plan identifies additional funding resources that will assist with realistic goals, strategies, and actions to this Economic Development Strategic Plan.

Future Vision and Goals:

An inventory and analysis of current conditions was conducted to provide a foundation and catalyst for the creation of the Economic Development Strategic Plan. Representatives from local businesses, industries, institutions, and government agencies attending the visioning and goals workshop were asked

¹ Source: ESRI Business Information Solutions, which uses data from InfoUSA, a sales leads and mailing list company. As InfoUSA uses a variety of data sources, it may not include every establishment located within a community and it may not reflect recent changes.

to brainstorm ideas that could stimulate the economy in Chenango County. The resultant feedback focused on six focused goals:

- (1) Encourage Business and Workforce Development;
- (2) Foster Downtown Revitalization;
- (3) Build Tourism;
- (4) Grow Agriculture and Forestry Industries;
- (5) Install Needed Infrastructure; and
- (6) Maintain Ongoing Communication and Collaboration.

It was expressed several times during the public participation process that more should be done in the County to foster a business friendly environment and increase workforce development. Many business owners expressed concern with the County's overall ability to retain existing businesses and attract new businesses. Market globalization and rural community stereotypes are two factors perceived to have negatively impacted the County's opportunities for growth. Creating and implementing a marketing plan to retain and attract businesses are two of the goals identified for fostering new for business development in the County.

Downtown revitalization goals focused on Chenango County's Central Business Districts (CBDs) and their potential and current attraction for residents, businesses, and tourists. The strategies and actions of downtown revitalization included façade rehabilitation, loan and/or grant programs, and improvement of signage, crosswalks, and landscaping. The desire is to increase the use of existing CBDs and their current infrastructure by renovation and restoration programs.

The purpose of the tourism development goal is to maintain existing marketing and develop new tourism resources. The tourism strategies and actions include improvement of signage and Internet resources, the development of tours and trails, and an increase in agritourism.

Given the County's long history in agriculture, it was unsurprising that many workshop attendees, organizations and Chenango County representatives have ideas about revitalizing the local farming economy. Diversification of the local agricultural economy was a central idea, with many participants suggesting alternative products. Other ideas to promote local agriculture including supporting area farmers, developing value-added agricultural projects, and educating area residents.

Infrastructure and interstate access is a double-edged sword in the County, benefiting some areas, but viewed as a hindrance in others. One idea to improve infrastructure included developing and promoting municipally-served "shovel ready" sites for development. Another strategy calls for the County to explore and develop low cost energy sources, such as natural gas.

Along with a Countywide Economic Development Strategic Plan, Chenango County recognizes the need to collaborate with other regional organizations. Existing regional organizations play various roles in

economic development, including workforce development, business development, and agriculture preservation and production. The Communication and Collaboration goal intends to combine regional resources to further the development of Chenango County.

The twelve strategies identified through this planning process include the following:

- Strategy 1. Provide supportive business retention programs for small businesses and manufacturing industries.
- Strategy 2. Provide and market a business friendly environment to recruit and attract new businesses.
- Strategy 3. Improve and expand the relationships the County has with educational institutions, businesses, and local governments.
- Strategy 4. Promote the four point *Main Street Approach to Downtown Revitalization*TM to revitalizing CBDs.
- Strategy 5. Promote recreational activities using the County’s natural resources—including its agricultural lands, forests, and water resources — as tourism resources.
- Strategy 6. Promote Chenango County’s cultural, natural, and historical resources as important contributing elements to the County’s quality of life.
- Strategy 7. Continue and strengthen the existing marketing plan to support year-round tourism.
- Strategy 8. Proactively pursue agriculture development as a form of economic development by developing new markets and products.
- Strategy 9. Support, sustain, and market the County’s existing agriculture and agroforestry businesses.
- Strategy 10. Continue to proactively promote the economic development of agroforestry opportunities.
- Strategy 11. Provide necessary infrastructure to areas with economic potential.
- Strategy 12.** Foster an environment by which Southern Tier Counties can continue to work together for mutual benefit on programs designed to solidify the local economy and resident population base.

A well-prepared Economic Development Strategic Plan is a tool that develops a vision for the community, identifies specific community development goals, and sets forth clear and focused steps that can be taken to implement and achieve these goals. The Plan can be used to understand changing economic conditions, identify community attitude toward community characteristics and needs and provide development opportunities. The success of the Plan will be measured on the achievements reached as Chenango County continues to strive toward its vision of the future.

I. Introduction

What is an Economic Development Strategic Plan?

An Economic Development Strategic Plan is a written document that through analysis of a community's historic and existing economic profile, its local and regional market conditions, and its strategic positioning to take on new economic roles, lays the groundwork for economic revitalization. An Economic Development Strategic Plan identifies the goals and strategies by which a community looks to achieve not only sustainable economic viability in a competitive regional market, but also economic growth to meet the future needs of its residents and businesses.

This Economic Development Strategic Plan, focusing on the local and regional economic climate and will act as a guide or “blueprint” for the future of Chenango County. This document includes detailed overviews of the County's major economic sectors, provides a regional context for these industries, and seeks to identify issues and opportunities related to each one. Finally, this Economic Development Strategic Plan outlines an implementation strategy designed to achieve the Plan's goals.

How this Plan is Set Up

The Chenango County Economic Development Strategic Plan is divided into nine main sections: I - Introduction, II – Demographic Profile, III – Community Resource Inventory, IV – Economic Industry Analyses Summary, V – Economic Profile, VI – Retail Market Analyses, VII – Economic Development Tools, VIII – Economic Revitalization Goals and Actions, and IX– Implementation. The final section includes the Appendices for the Plan.

Section I, *Introduction*, includes a description of the Plan as well as a detailed summary of the public participation and outreach efforts conducted as part of the planning process. This section also contains summaries of several planning documents and studies that were reviewed to establish a better understanding of Chenango County and the context with which to evaluate the regional economic development climate.

Section II, *Demographic Profile*, contains information on the regional setting of the County, as well as a demographic profile and labor characteristics of the County's residents. The information in this section is very useful in that it documents the current socio-economic status of the County.

Section III, *Community Resource Inventory*, contains an evaluation of the County's existing resources, including is transportation accessibility, employee and employment centers, historic resources and heritage tourism resources, natural resources, and existing water and sewer infrastructure. Comments

received throughout the planning process from residents, property owners, and business owners have also been incorporated into this section of the Plan.

Section IV – *Economic Industry Analyses Summary*, includes an employment analysis of Chenango County’s industrial sectors. The analyses identify employment trends occurring between 1975 and 2003. This section presents an overview of the County’s industries as well as the current regional and local employment base.

Section V – *Economic Profile*, is based largely on field investigations and research during site visits, online resources, and published resources. Comments received throughout the planning process from residents, property owners, and business owners have also been incorporated into this section of the Plan.

Section VI, *Retail Market Analyses*, includes an overview of Commuter Patterns from the 2000 Census. Additional economic studies seeking to identify local expenditures, local businesses, and establish an understanding of the local retail market are also included. The source for much of the data used in the market analysis is ESRI Business Information Solutions (ESRI BIS), a division of ESRI.

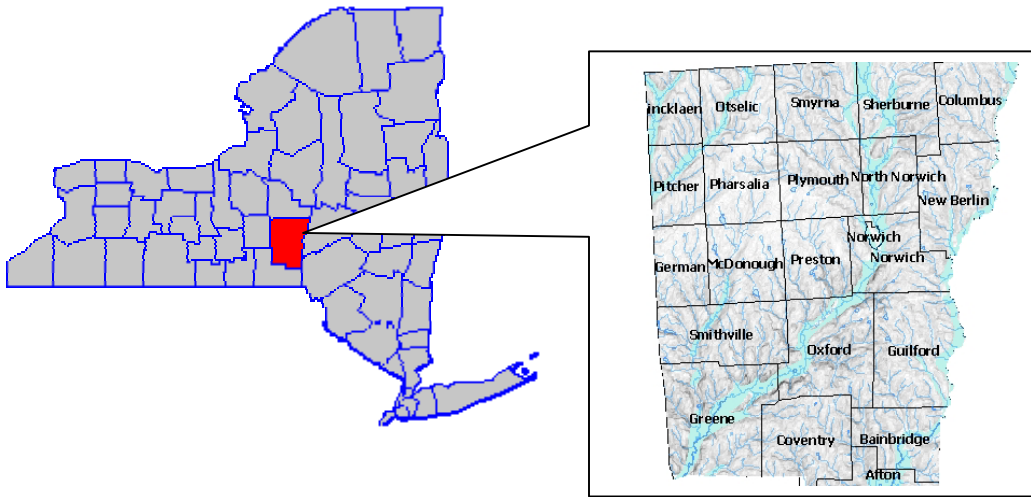
Section VII, *Economic Development Tools*, includes an overview of existing economic development resources available to Chenango County. This section also includes information on the Empire Zone Development program and descriptions of the Empire Zone in Chenango County.

Section VIII, *Future Vision and Goals*, provides a vision statement and detailed descriptions of the goals that the County has opted to pursue for economic revitalization. Several specific actions or strategies have been identified to achieve each goal.

Section IX, *Implementation*, puts the actions or strategies in the context of a matrix. The matrix identifies which activities should be short-term or long-term goals, or whether the activity is one that will be ongoing. The matrix also identifies a party responsible for enacting or overseeing the activity and a potential funding source.

Section X, *Appendix*, includes compilation of additional documents necessary for full understanding of the Plan’s evolution and development. The Bibliography documents all the written reports and articles, online sources, and maps consulted to draft the Plan. Also included in the Appendices are documents related to the Public Participation process that was conducted to gain input from the public throughout the planning process. These include copies of meeting agendas and presentations, as well as the business survey and survey results.

County Overview



Location of Chenango County

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. The County is also a part of what is known as the “Central – Leather Stocking Region”, as delineated by the New York State Department of Economic Development. Included within this designation are Chenango, Broome, Madison, Montgomery, Oneida, Otsego, and Schoharie Counties.

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 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 51,401 in 2000, according to the U.S. Decennial 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 2000 Census data, the largest community in the County, and the County Seat, is the City of Norwich with 7,355 residents. The largest towns in the County are Greene, with 5,729 residents; Oxford with 3,992; and Sherburne, with 3,979. The largest village in the County is the Village of Greene (1,701 people in 2000) located in the Town of Greene.

Between 2000 and 2004, Chenango County ranked 30th in population growth of New York State's 62 counties, according to the U.S. Census. During the same time, Madison ranked 21st, Otsego 22nd, Delaware ranked 16th, Broome ranked 58th and Cortland ranked 31st.

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. In fact, Chenango County is in the top 50% of New York State's dairy counties in terms of total milk production. Timber products and field crops are secondary Chenango County cash crops. Wood manufacturing is a predominant manufacturing industry.

Local Chenango County manufactures produce forklifts, pharmaceuticals, cord, and transportation components, among other products, including specialty art paints, and value-added agricultural products. However, the manufacturing industry in Chenango County has declined greatly in the past 50 years due to global competition and the trend for manufacturing facilities to relocate in Mexico, India, China and other developing nations. Fortunately, Chenango County is the historic home to two large insurance and financial corporations whose local headquarters provide substantial employment.

The Planning Process

Chenango County Restructuring and Organization

Comprised of thirty different municipalities, Chenango County, in an effort to make the most of its limited financial planning and development resources, has been thinking of itself more broadly as a "community." Rather than following a myopic economic development agenda focusing on efforts at the municipal level, Chenango County had made a deliberate decision to take a regional, more holistic approach to economic development. By creating an economic development approach and identifying its economic resources at the County level, Chenango County is better positioning itself to get a more accurate understanding of its economic potential and competitive advantages.

Over the past few years, a variety of economic development strategies and action plans have been developed for Chenango County as well as for the Southern Tier of New York. In addition, several agencies have provided services to the County, performing overlapping economic development-related tasks. Finally, recent modifications to the NYS Empire Zone program have resulted in new requirements related to accountability, measurability, efficiency, and cooperation—all areas difficult to quantify and qualify under the County's previous fractional organization structure.

Efforts to streamline these agencies have resulted in the consolidation of governing boards (where 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 vision and mission to best serve the County. With a more seamless

collaboration, the intent is for one strategic lead agency to direct the County's economic development efforts, focusing on clearly defined outcomes and increased client accountability.

Chenango County is now looking to further enhance its service to County residents and businesses by developing a community-wide County Economic Development Strategic Plan that incorporates the results from years of ongoing planning efforts, but further advances these efforts. This plan, developed through the use of ongoing public outreach efforts, will prioritize projects, identify potential funding sources, and provide detailed information regarding implementation, including actions to strengthen the viability of the County's agribusiness and tourism sectors, as well as its ability to attract and retain small businesses.

Existing Conditions Assessment

The team planners conducted an inventory and analysis of Chenango County's economy. Using demographic data from the U.S. Census Bureau, as well as the New York State Department of Labor, the New York State Department of Agriculture and Markets, and ESRI Business Information Solutions (a data service provider) a general economic profile of Chenango County was developed. Other relevant plans and reports were examined to identify regional trends that might have an impact on Chenango County.

Public Outreach

Incorporation of public input early and often throughout the Plan's development is a key element in the planning process. In order to develop an action plan built on a foundation of common goals and objectives, it is imperative to receive feedback from the County's elected and appointed leaders, business owners, and residents.

County Site Visits

Over the course of four days, July 13, August 16, September 13, and November 16 the planning consultants conducted two County driving tours, one full day of factory visits, and one full day attending the 2005 Agriculture Summit IV. These site visits in Chenango County provided guidance to the planning consultants on how to move forward in developing the economic development strategic plan for Chenango County.

The following is a summary listing of all site visits conducted as part of this planning process.

Initial County Driving Tours

- Tour of Northern Portions of Chenango County on July 13, 2005.
- Guided Tour of Southern Portion of Chenango County on August 16, 2005: Guided by Maureen Carpenter of Chenango County Chamber of Commerce.

Chenango County Factory Visits

- Factory Visit #1 on September 13, 2005 1pm – 2pm:
 - Gladding (Rope Manufacturing).
- Factory Visit #2 on September 13, 2005 2pm – 3pm:
 - Baillie Lumber (Timber Manufacturing & Saw Mill).
- Factory Visit #3 on September 13, 2005 3pm – 4pm:
 - Golden Artists, Inc. (Paint Manufacturing).

- Chenango County 2005 Agriculture Summit IV
 - November 16, 2005 9am – 4pm.



Baillie Lumber

Business Questionnaire

As part of the public participation effort, invitation letters, and stakeholder questionnaires were sent to approximately 110 Chamber of Commerce members, Chenango County Area Corporation members, and other area business representatives. With 12 responses, this correlates to an 11% return rate. A summary of the responses follows.

When asked how they would characterize the local business climate today--in 2005--as compared to 1995, most business representatives described it as “challenging” or “improving.” The decline of the 18-35 year old population, coupled with increasing taxes, regulations, and energy costs were cited as causes of concern. Despite this, several businesses had experienced upturns in their local demand, production, and output.

In response to questions regarding potential market opportunities, survey respondents gave differing responses, which, given the diversity of the businesses and industries involved, is unsurprising. Answers ranged from further penetration of existing markets to expanding outside the existing market to growth in international markets. Several identified new product development (Marchant, Norwich Motors) as methods to widen their companies’ respective market shares.

Regarding the quality of the area’s labor force, again the response was mixed. While the supply of clerical workers was identified as adequate, more skilled technicians and professionals were deemed in short supply. Some firms stated they conduct in-house training while others rely on outside training resources. Both BOCES and the Workforce Investment Board were mentioned as potential resources, but none of the respondents had had much experience with either of them. Expanding the Morrisville Community College at Norwich to allow more college-aged residents to stay in Chenango County was one suggestion to ameliorate the County’s lack of qualified workforce.

Respondents provided a variety of suggestions when asked what market opportunities the County could pursue for enhancing its economic viability. Developing an effective marketing strategy that promotes the

area's strong quality of life, prime business location, and quality labor force, was identified as important. Developing "shovel-ready" industrial sites for incoming businesses and fostering a more "business-friendly" atmosphere, both at the local and State level, were suggested as potential strategies. Tax relief, possibly effected through the consolidation of local municipal and County services was also suggested. Potential markets that merit further examination included: microbusiness and cottage industry growth; natural resources/outdoors; in-County wood processing and product manufacturing; pharmaceuticals; and the creative arts.

Although most questionnaire respondents indicated that they did feel local resources met their business needs, a few changes would be welcome. If taxes, fees, and regulations were to decrease, or at least stay the same, would help. Increased opportunities for business expansion loans, and more collaboration, particularly on worker recruitment, are both viewed as areas that could be improved.

Finally, when asked what type of commercial industries should be encouraged to locate in Chenango County, the majority of respondents identified manufacturing, especially "clean manufacturing," as desirable. Alternative suggestions were to support existing businesses' product/market expansion; foster the growth of small businesses consistent with the County's rural nature; and encourage growth of the County's tourism infrastructure.

Economic SWOT Workshops

Several workshops were held to gain a better understanding of Chenango County's economic climate, as viewed by its own business owners, government leaders, and residents. A common strategic planning technique known as a S.W.O.T. (strengths, weaknesses, opportunities, and threats) analysis was conducted. This technique is useful in identifying the critical issues currently confronting the County's economic structure. The community can then develop a pro-active approach to economic development, one that is designed to build on strengths, seize opportunities, minimize weaknesses, and counter threats.

The first S.W.O.T. workshop, on September 14, 2005, was held to identify economic strengths and weaknesses in Chenango County. The second S.W.O.T. workshop, on October 18, 2005, looked at identifying economic opportunities in the County. The third and final S.W.O.T. workshop, on November 17, 2005, examined outward trends and forces that may present threats to the County's economic progression.

The S.W.O.T. workshop participants were divided into groups with one person from each group asked to record comments. One person from each group was selected to present findings to the wider group. Through these workshops, the plan consultants were able to obtain a clearer understanding of the significant economic issues facing the County.

Strengths

What is an economic strength?

Strengths are the resources that strengthen the economic base and positively contribute to business operations. These resources may include people, location, natural and cultural resources, programs, and organizations that make doing business in the County desirable. Strengths foster economic development and help retain and expand business.



Chenango County field

Strengths focused on quality of life, labor, business, and geography in Chenango County. The participants described the County's strong sense of community and family values, rich history, low-crime rate, involved community, and accessibility to arts, recreation and culture as positive attributes. Accessible health care services and affordable housing were cost-of-living factors that were regarded favorably. Environmental strengths mentioned include the County's climate and its stable environment.

Chenango County's experienced, skilled, and talented workforce was highlighted as an important resource. Committed and willing with a great work ethic, local workers are also regarded as relatively affordable.

The local business community was largely regarded as a favorable factor. In particular, Chenango County is fortunate to have a number of established businesses, such as NBT Bank, OSG Norwich Pharmaceuticals, Procter & Gamble Pharmaceuticals, and Preferred Mutual Insurance Company. Local investment opportunities, economic development programs, and financial support are all strengths of the local economy that support business growth. Active leadership, from both the government and business sectors, was generally identified as a strength in the community.

Locational attributes lending themselves to Chenango County's economic stability include the County's central location and its accessibility to major markets. Natural resources include the County's available land, natural gas, and rural beauty. Other noted resources include local educational opportunities and tourism infrastructure.

Weaknesses

What is an economic weakness?

Weaknesses are negative factors or attributes that provide obstacles or stumbling blocks to economic development, and detract from business retention and expansion in the County.

The main weaknesses identified were labor, followed by quality of life, political atmosphere, infrastructure, and businesses. Three major labor topics mentioned were labor incentives, employee retention, and training resources. Lack of job opportunities and low wages were identified as hindrances to retaining highly skilled workers, in the short term, and contributing to a "brain drain" and diminishing

opportunities for future generations, in the long term. Employer concerns include lack of employee commitment, lack of financial resources for both training and for salaries.

Other weaknesses, or perceptions of weaknesses, hindering community development can be classified into three categories: cultural opportunities, aesthetics, and accessibility. Identified cultural weaknesses included the population's resistance to change and lack of global thinking. Chenango County's largely homogenous, aging, and declining population was regarded as lacking cultural diversity and creativity. Aesthetic concerns include the County's increasing multi-family homes, diminishing housing quality, and junk cars and dilapidated structures that present eyesores on the landscape. Many expressed concern about young people's perception that there is little to do in the County. While this perception may be overstated, the fact that many residents leave the County to pursue educational opportunities and travel outside the County to shop (as evidenced by the County's retail leakage) does partially substantiate the validity of this perception.

There are a number of weaknesses associated with the local political atmosphere. The City of Norwich's government was described as "unsettled" and viewed to be problematic. Regionally, there is a lack of collaboration that results in parochialism, isolation, and fear of loss of political stature. Another political weakness is the disconnection between the County's businesses and educational institutions.

Infrastructure and interstate access is a double-edged sword in the County, benefiting some areas, but viewed as a hindrance in others. Identified transportation weaknesses included the lack of interstate access for most of the County, high transportation costs, limited public transportation, and NYS Route 12. A lack of municipally-served "shovel ready" sites and high energy costs were also identified as infrastructure weaknesses, as was the County's rural nature and physical geography which contributes to high new infrastructure costs.

There were specific concerns about a declining tax base, especially in the City of Norwich. There was also a concern about the future of businesses in Chenango County, threatened by the high cost of doing business, rising taxes, and lack of business experience. The County's shrinking agricultural base, and lack of "exit plans" was also identified as a concern.

Opportunities

What is an economic opportunity?

Opportunities are any factors or resources that may potentially be built upon to enhance the community's economic stability and strength. These factors or resources ultimately yield a desirable economic outcome.

In brainstorming opportunities to invigorate the local economic outlook, workshop participants focused on several long-established economic development techniques. These included developing new economic development programs, providing for additional education and training, enhancing available lands with infrastructure, and marketing the County. Developing a way to compete with foreign competition was

identified as important, with one idea focusing on specialization and the development of proprietary products.

Economic development measures included creating a local economic development position responsible for spearheading activities. Working with NYS Empire State Development, thus benefiting from their online resources such as their industrial site finder, was another suggestion. Providing support to business start-ups, e.g., business incubator, business plan creation, or financial support, was another suggestion. Strengthening local human resource networks to improve labor retention was another idea. Developing measures supporting local reinvestment, such as reduced tax assessments on improved properties or rehabilitating abandoned properties and returned them to the market was also discussed.

Other measures focused on building on the County's educational institutions and alumni. Establishing more dynamic relationships with local schools, including BOCES and Morrisville State, was identified as a way to better direct local institutions to meet local need. Developing a "Youth Leadership Chenango" program to get young people involved in the local community was suggested.

Group participants identified several measures to make Chenango County more attractive to business, such as providing improved infrastructure, e.g., development-ready land, water, sewer, low cost electricity, improved transit routes, etc. Other County resources to be promoted include its agricultural base and other natural resources. Exploring other energy alternatives was also suggested as a potential infrastructure opportunity.

Several ideas related to marketing Chenango County were identified. Participants expressed a need for the County to identify just who/what it would like to market to and then strengthen those efforts. One idea was to market the area's labor force to small businesses located in higher cost metropolitan areas, highlighting the affordable housing, country beauty, and "1-minute rush hour." One specific marketing target identified was planned retirement communities.

There were several themes related to quality of life identified as potential opportunities. First, to address the perception that there is little to do in Chenango County, it was suggested that the County work to develop more year-round activities. Suggestions included an indoor tennis facility, a mall, and organized recreation programs. Developing more special events, festivals, riverfront amenities, trails, outdoor recreational facilities (such as camps and soccer fields) were also suggested. Constructing a Visitor Center, maintaining a website, and posting flyers, were several methods identified to promote such resources. Health care is another area that provides a potential opportunity for improvement.

Finally, there were several ways local community participation presents opportunities for the future. Educating the public, including local government leaders, business representatives, and residents on local efforts, encouraging local "buy-in" and commitment into the process was identified as important to success. Developing comprehensive land-use plans was suggested as one way to plan for the future.

Consolidation of government (similar to what the County is presently doing) was identified as another opportunity.

Threats

What is an economic threat?

Threats are impending and uncontrollable forces that could potentially limit economic development and prevent business retention and expansion.

Internal threats are those aspects of Chenango County that may limit the County's potential development. The primary internal threats included local politics and quality of life factors. Other identified influences included: business, education, labor force, infrastructure, and costs of products. External threats are influences outside of Chenango County that interfere with economic development and growth. Cost of products, politics, and competition are considered major external threats to Chenango County.

Quality of life factors regarded as threats include the continued aging of the population, which is having a double impact, resulting in a diminished labor force and an increase in demands for social and health care services. A collective resistance to change, along with limited lifestyle choices and a lack of diversity is perceived as prompting younger residents to leave the County. The participants identified the County's inability to successfully market itself to younger people and encourage new migration into the County as a problem.

Another identified internal threat in Chenango County is the political atmosphere where a lack of municipal cooperation often prevents countywide planning. The cost of local government, especially due to inefficiencies, result in burdensome taxes for County residents. Workshop participants indicated a need for the County to have a consolidated economic development voice and implementer, rather than a myriad of small groups, which tends to hinder the development of focused, strategic plans.

Other identified internal threats included the education system, labor force, and existing business community. Lowered educational standards and expectations are blamed for the County's perceived high-drop out rate, poor reading levels, and poor work ethic. This lack of skills perpetuates into the workforce, impeding their ability to be prepared and dedicated at work. The participants indicated that the failure of existing local businesses to work with local education providers contributes to this discord between education and work.

Infrastructure and costs of products are two final internal threats within Chenango County. Infrastructure threats include the lack of "shovel-ready" sites, the permit process, and deteriorating housing stock. Natural gas and education present costs that threaten Chenango County's continued solvency.

The cost of products is a growing external threat to Chenango County. Agricultural businesses are impacted by the rising costs of raw materials, feed stock, and supplies. The entire Chenango County community is threatened by rising energy, gas, and health care costs.

State and National involvement can hinder economic development. The mandated State regents diploma requirements makes additional demands of the public educational system and limits the resources available to teach and train students appropriately for local job opportunities. The County is also burdened by the fact that so much land in the County is State-owned, and thus is not included in the tax roles. National government milk pricing negatively impacts profitability of the County's dairy farms.

Market globalization and stereotypes associated with rural areas are two factors perceived to have negatively impacted the County's opportunities for growth. Many Chenango County manufacturing businesses are threatened by offshore and overseas competition. Many believe there is a bias against rural communities that often hinders Chenango County's growth.

Minor external threats identified included inadequately maintained transportation routes, which make it difficult to attract new businesses, especially business headquarters, and create accessible tourist destinations.

Previous Planning Efforts

Chenango County

2004 Chenango County Cultural Plan

In 2003, the Chenango County Council of the Arts received a \$10,000 Challenger American Grant from the National Endowment for the Arts. The funds allowed the Chenango County Council of the Arts to develop a Chenango County Cultural Arts Plan, a comprehensive art plan.

In addition to providing an overview of the County's existing cultural resources, the Chenango County Cultural Arts Plan examined the connection between the County's cultural resources and potential economic development growth. The Plan identifies methods to encourage tourism and promote Chenango County. Cultural resources described and discussed in the Plan include historic landmarks and districts, annual festivals and community events, museums, theaters and performance venues, libraries, galleries, and musical, theater and dance groups.

2003 Chenango County Profile

In 2003, the Southern Tier East Regional Planning Commission produced the 2003 Chenango County Profile, the most recent in a series of profile documents produced by the regional board over the past 30 years.

The document is a compilation of data regarding the people, economy, and culture of Chenango County. The U.S. Census Bureau, both the Decennial Census of population and housing and the economic censuses, were consulted as sources for most of the data. The main purpose of the profile was to provide

a clearer picture regarding Chenango County's socio-economic characteristics, as well as to develop a better understanding of the significance of the data and findings.

This document is a compilation of demographic information concerning the people, economy, and culture of Chenango County. The information provided refers to the entire County, as well as individual Towns, Villages, and City to promote a further understanding of the area. This document also includes information on Chenango County's public infrastructure, transportation access, community facilities, and economic development organizations.

2003 Chenango County Interim Economic Development Action Plan Summary

This plan focused on three categories: (1) Infrastructure Development; (2) Promotion, Publicity, Advertising; and (3) Business Development.

Objectives related to infrastructure development included:

- Inventorying the County's infrastructure;
- Preparing "shovel-ready" business/industrial park space;
- Facilitate occupancy of business and industrial space (including sites for immediate occupancy plus space targeted to a variety of industry types);
- Leverage local resources (natural gas) to encourage development;
- Investigate feasibility of large-scale wind power generation;
- Ensure long-term viability of economic corridors (Route 12) – develop other transportation corridors (Routes 7, 8, 88); and
- Investigate feasibility of forming regional water/wastewater authorities or districts.

Objectives related to Promotion, Publicity, and Advertising included:

- Create a recognizable image that represents the quality of the Chenango County area (plus promote);
- Maintain agriculture (promote);
- Maximize sites plus space available for economic development (data base of resources inventory publicize); and
- Recruit the creative class (foster arts community, develop targeted promotional materials).

Objectives related to Business Development included:

- Advocate small business ventures – then micro enterprise mentoring/training and marketing assistance;
- Agribusiness development – encourage diversification, value in added;
- Supplier connection program – leverage existing industrial assets to recruit suppliers;
- Further development of natural resource – based industry (esp. wood products); and
- Leverage existing business enterprises to create additional business ventures of like-industry (clusters) to support "critical mass".

1998 Chenango County Agriculture & Farmland Protection Plan

The Chenango County Agricultural & Farmland Protection Board produced this Plan in June 1998. The main body of the plan covers the importance of agriculture to the County, agriculture profiles in the County, factors affecting the viability of agriculture in the County, farmland protection, review of resources available to protect agriculture and farmland, and results from a survey of farmland owners.

The document outlines a detailed action strategy. The Plan strongly supports comprehensive planning, zoning, subdivision regulation, and site plan, which work to protect agriculture and farmland. It notes the lack of zoning in the Towns of Chenango County, and calls on local communities to take a stake in their future. It supports property tax reform, which works to protect agriculture and farmland. Finally, it supports advocacy for farmers and their lands, and proposes a County Agriculture Center as a central network of agriculture support organizations.

In addition, the Plan proposes a number of value-added strategies:

- Raw milk processing facility;
- Farmers market harvest festival;
- Agricultural development revolving loan fund;
- Regional food processing incubator site;
- Meat processing facility;
- Chenango County product logo and seal of quality; and
- Expansion of the County's forest products.

1996 Chenango County Economic Development Strategy & Action Plan

The purpose of this Plan was to provide information that will give those who are involved with economic development in Chenango County a broader understanding of existing conditions, trends, attitudes, opportunities, and obstacles. Development targets were established and "first step" actions were identified.

Economic development goals for Chenango County were outlined in the Plan. The highlighted goals for Chenango County's strategy and action plan for the citizens is to create more jobs, strengthen local business base, increase income, promote diversity and preserve traditions, and quality of life, and bring in wealth. Political goals are to expand the tax base, and improve government operations. They include:

- Create jobs;
- Expand the tax base;
- Promote diversity and stability;
- Bring in wealth;
- Increase income;
- Import substitute;
- Strengthen the local business base;
- Improve Government operations; and
- Preserve traditions and the quality of life.

1992 Chenango County 2020 Vision Plan

In 1990, the Chenango County Commission on the Future was charged with developing a community-based plan to guide public and private policy and decision making into the twenty first century. Accordingly, the commission and seven 2020 planning teams produced a plan that articulated the County's vision for the future. In 1992, the plan was completed and included a collection of background information, findings, and a range of planning recommendations. The Plan included public input from 2,500 Chenango County residents and more than 200 volunteers.

The 2020 Vision included discussion, analysis, and recommendations covering a wide range of topics including open space preservation, consolidation of County and municipal government, housing and educational improvements, significant lifelong learning opportunities, and economic diversity. The 2020 Vision Plan's recommendations and proposals were split into eight categories related to: quality of life, environment, government consolidation, preservation of rural character, economic development, housing, technological innovation, and the pooling of community resources.

Some specific recommendations and proposals included:

- Promotion of self-help and volunteerism;
- County leadership for the extension or development of public water and sewer systems in areas in need of these services;
- Protection of environmental resources such as aquifer recharge areas;
- Consolidation of County and municipal government;
- Preservation of farmland and the County's rural character;
- Attraction or promotion of new businesses that can capitalize on the County's strong dairy and agriculture base;
- Retention and expansion of existing businesses;
- Address countywide housing needs; and
- Expand access to services using electronic and fiber optics networks.

Land Use Plans and Regulations in Chenango County

As of November 2005, the minority of Towns and Villages in Chenango County has created land use plans and regulations for their area. Table 1 shows the communities with land use plans and regulations. Over 50% of the Towns and Villages have site plans and subdivisions, but only three Towns (Columbus, New Berlin, and Sherburne) and two Villages (Earlville and Greene). In Chenango County, zoning regulations are in the villages, considering there are five Villages (Afton, Bainbridge, Greene, New Berlin, and Oxford) and one Town (Oxford) with zoning regulations. The City of Norwich currently has a comprehensive plan, subdivision, and zoning.

Table 1: Land Use Plans and Regulations in Chenango County

	Site Plan	Subdivision	Zoning	Right to Farm (Local)	Comprehensive Plan
Towns					
Afton	X	X			
Bainbridge	X	X			
Columbus		X		X	X
Coventry	X				
German		X			
Greene	X	X			
Guilford		X			
Lincklaen	X	X			
McDonough					
New Berlin	X	X		X	X*
North Norwich	X	X		X	
Norwich	X	X			
Otselic	X	X			
Oxford	Z	X	X		X*
Pharsalia					
Pitcher		X			
Plymouth	X	X			
Preston				X	
Sherburne	X	X		X	X*
Smithville		X			
Smyrna		X		X	
Villages					
Afton	X	X	X		
Bainbridge	X	X	X		
Earlville					X
Greene	X	X	X		X
New Berlin	X	X	X		
Oxford		X	X		
Sherburne					
Smyrna		X		X	
City					
Norwich		X	X		X

Z refers to zoning ordinances, * means plan is in progress. Sources: 2005 Chenango County Directory of County, Town and Village Officials

The Region

2005 CDO Workforce Investment Area Comprehensive Three-Year Local Plan

The CDO Workforce Investment Board is an economic development organization designed to meet the needs of businesses, workers, and young people. The organization provides career opportunities for workers and youth training services. The CDO Workforce Investment Board has created a One-stop Career Center. Although the career center has been somewhat successful, it is limited by its available funding and hours.

The three-year local plan intends to evaluate the current program and improve it. The CDO Workforce Investment Board recognizes that regional trends influence a local plan and they appropriately use regional trends as indicators to workforce development. The CDO Workforce Investment Board also assesses economic shifts and trends and train employees appropriately. The three-year local plan intends to continually assess the previous years, improve the efficiency, and accommodate businesses and clients.

2004 Summary and Analysis of Southern Tier East Region Population Estimates

The Southern Tier East Regional Planning Development Board conducted an analysis and summary of population estimates for the Southern Tier East Region and its Counties from July 1, 2003 to July 1, 2004. This brief report was prepared to put the most recent release of Census population estimates into a context, which would help local governments, non-governmental organizations, and the public to understand the meaning of the figures and recent population trends.

This report indicates a recent population loss, which is the continuation of a long term trend within the region and its neighboring Counties. This region represents an older population. The population statistics indicate an increase in death rates and a decrease in birth rates.

The document recommends the need to attract young adults to the region. According to the Census Bureau, a majority of the population relocate for better housing opportunities, followed by family reasons such as marriage status or desire to establish one's own homeownership. The domestic out-migration continues to be a contributor to the New York State's population loss, and the foreign migration does little to help offset the loss of population.

2004 CDO Workforce: State of the Workforce Report

Chenango, Delaware, and Otsego (CDO) Workforce published the State of the Workforce Report, in 2004. This document provides a demographic profile, workforce characteristics, and a realistic perspective of the challenges facing the area, in particular Chenango County. This analysis by CDO Workforce is intended as a planning tool so it may be used for regional development.

Along with demographic information, CDO sponsored industry sectors roundtables in March of 2004. The roundtables discussed needs and within an industry. Several suggestions included:

- Work ethic and social skills;
- Collaboration between business and other organizations;
- Training technical workers;
- Training for health care positions;
- Developing internship programs;
- Finding alternative funding sources for these items; and
- Utilizing the CDO Workforce's One Stop Career Center Resources.

The 2004 CDO Workforce analysis addressed the current challenges facing these Counties. In particular these Counties face challenges of a decreasing population of young children, an increasing population of aging citizens, a high percentage of local teachers nearing retirement, an increasing number of students not completing high school, and a general lack of skills and apparent apathy of young persons entering the local workforce.

2004 CDO Workforce: Issues and Actions

Chenango, Delaware, and Otsego (CDO) Workforce published the Issues and Actions, in 2004. This documents provided demographics information and analysis for the development of strategies and actions in the region. This report addressed issues and actions related to trends in the manufacturing, health care, finance, retail, and hospitality/tourism sectors.

Education is the central theme to the Manufacturing action for both firms and employers. Educating local firms includes informing the firms of local programs, services, and funding mechanisms available for business growth and prosperity. The employees' education includes promotion of local employment opportunities, promotion of local career centers, and providing grants for training needs.

Health care identified actions as worker training and development opportunities. Providing more training and support for health care employees can assist with the shortage of health care workers in the region. The education to young adults about the opportunities and advancement in the health care field are actions that will encourage the increase of health care workers.

Actions identified for finance include a career center, customer service education class, and educating young adults. CDO Workforce action included a customer service and sales certification course to be offered to train and encourage young adult employment. Creating a One-Stop-Career Center action will assist with development, education, and employee training.

Actions identified for retail and tourism include an increase in publicizing retail within the area and educational classes to prepare the employees. CDO Workforce action seeks the creation of a customer service and sales certification course to prepare and develop employees. Another action is to create an aggressive advertising campaign to inform the retail opportunities available in the area.

The conclusion of this document suggests employers and people seeking work to contact the CDO Workforce Career Centers throughout the three counties. These One-Stop Career Centers provide a number of services to encourage and improve employee skills and training.

2004 CDO Workforce: Youth Summit

In 2004, the CDO Workforce held a Youth Summit. The purpose behind the summit was to bring together the area's youth with local business representatives. Youth representatives identified some of their concerns related to living in the area as well as what actions local employers might take to inform them about job opportunities.

2002 Census of Retail & Wholesale Trade Summary Reports and Analyses

The Southern Tier East Regional Planning Development Board prepared separate reports for the 2002 Census of Retail Trade and the 2002 Census of Wholesale Trade. These documents compared Census information from 1997 and 2002. These Reports provides considerable information concerning the general pattern of retail and wholesale trade activity within the Southern Tier East Region.

Chenango County is the third most dominate County in the Southern Tier East Region for Wholesale Trade with 40 establishments in 2002, or 11% of total establishments for the Region. The Region as a whole has less than half the number of wholesalers that would be expected from the Region's population. The machinery, equipment, and supplies dominated the Regions' wholesale trade.

In 2002, the Southern Tier East Counties retail establishments totaled 1,700, and Chenango County represented 12% of the total establishments with 196 retail establishments. Just as machinery, equipment, and supplies dominated the Regions' wholesale trade similarly the automotive dominated the retail trade in establishments.

The Census of Retail Trade and the Census of Wholesale Trade provide an opportunity to review the County and regional economic structure and to begin to anticipate future growth trends. These reports are two in a series of documents prepared to better understand the Region's economy.

II. Demographic Profile

Introduction

This section summarizes a number of trends, including social, economic, and housing characteristics, currently impacting the County. For comparative purposes, data for New York State and the U.S. will be evaluated, where appropriate. This information is culled primarily from the U.S. Census of Population and Housing, 1990, 2000, the U.S. Bureau of Labor Statistics, the New York State Department of Labor, the Environmental Systems Research Institute (ESRI) Business Information Solutions data and various Chenango County documents and plans. For comparative purposes, five adjacent counties have been analyzed as well. The region will be known herein as the “six county region”.

Population

Between 1990 and 2000 the population of Chenango County decreased by .7%, from 51,768 in 1990 to 51,401 in 2000. During the same period, each of the counties within the six county region experienced either a population decrease or a very small increase.

From 2000 to 2010 the population of both Chenango and Broome Counties is projected to decrease. Within the same period, the population of Cortland and Madison Counties is forecasted to increase by approximately 2%. Otsego County has the highest projected population increase at 15.5%.

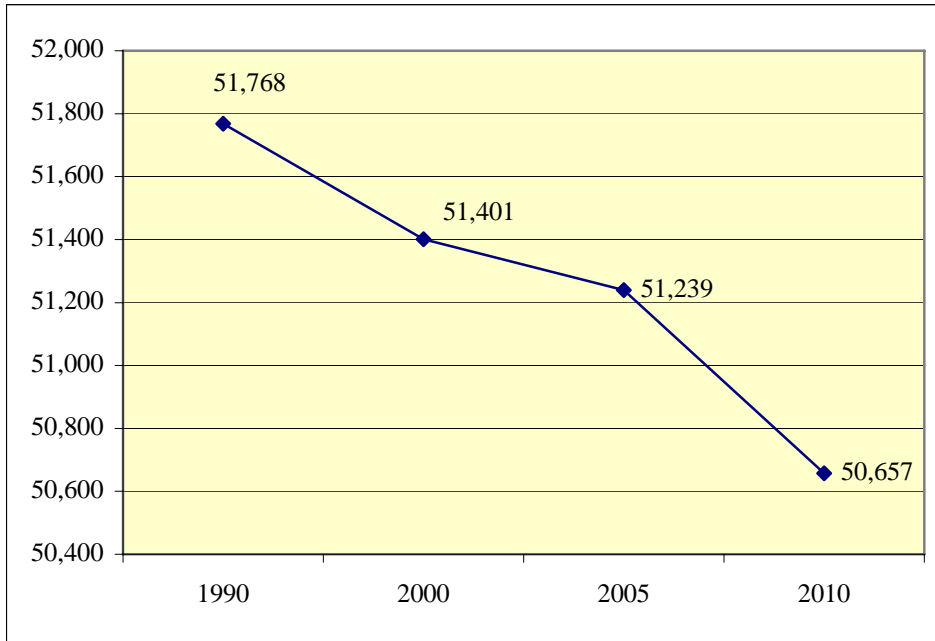
Table 2: Population Trends

Area	1990	2000	2005	2010	1990-2000 % Change	1990-2010 % Change
Chenango County	51,768	51,401	51,239	50,657	-0.70%	-2.20%
Broome County	212,160	200,536	197,709	194,965	-5.50%	-8.10%
Cortland County	48,963	48,599	49,162	50,113	-0.70%	2.30%
Delaware County	47,225	48,055	46,236	45,096	1.80%	-4.50%
Madison County	69,120	69,441	70,473	70,870	0.50%	2.50%
Otsego County	60,517	61,676	65,662	69,886	1.90%	15.50%
New York State	17,990,455	18,976,457	19,411,913	19,871,975	5.50%	10.50%
United States	248,709,873	281,421,906	298,727,898	317,430,845	11.60%	27.60%

Source: U.S. Census Bureau, 1990 – 2005. Source of projections: ESRI Business Information Solutions

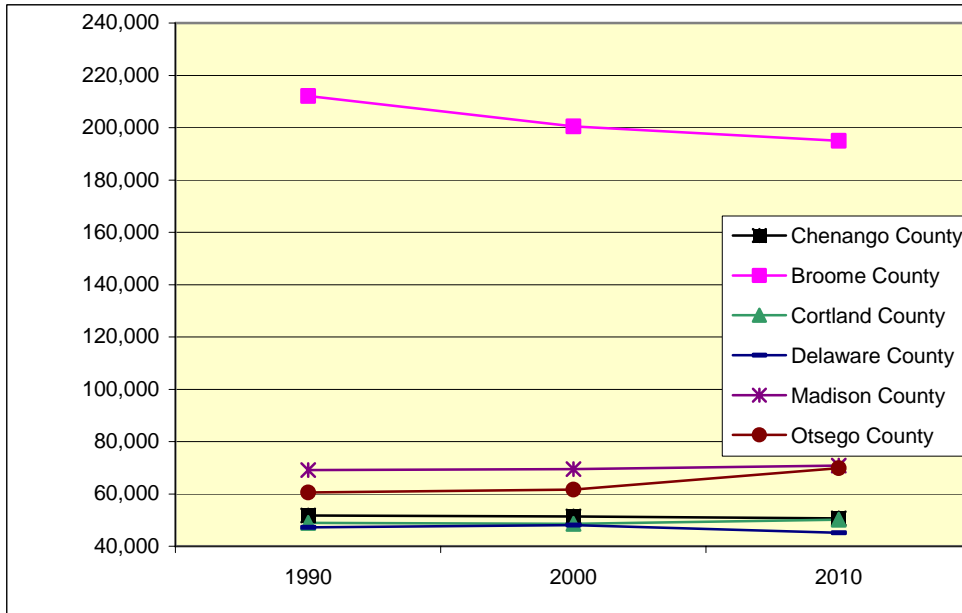
Otsego County is the only county in the six county region that is on par with State and National population growth trends between 2000 and 2010. The remaining counties, including Chenango County, are lagging in population growth and are projected to continue this trend in the future. The extent to which the population is migrating out of Chenango County and the six county region is reflective of both the economic conditions.

Graph 1: Chenango County Population Trend, 1990 - 2010



Source: U.S. Census Bureau, 1990 - 2005. Source for Projections: ESRI Business Information Solutions

Graph 2: Comparable County Population Change, 1990 - 2010



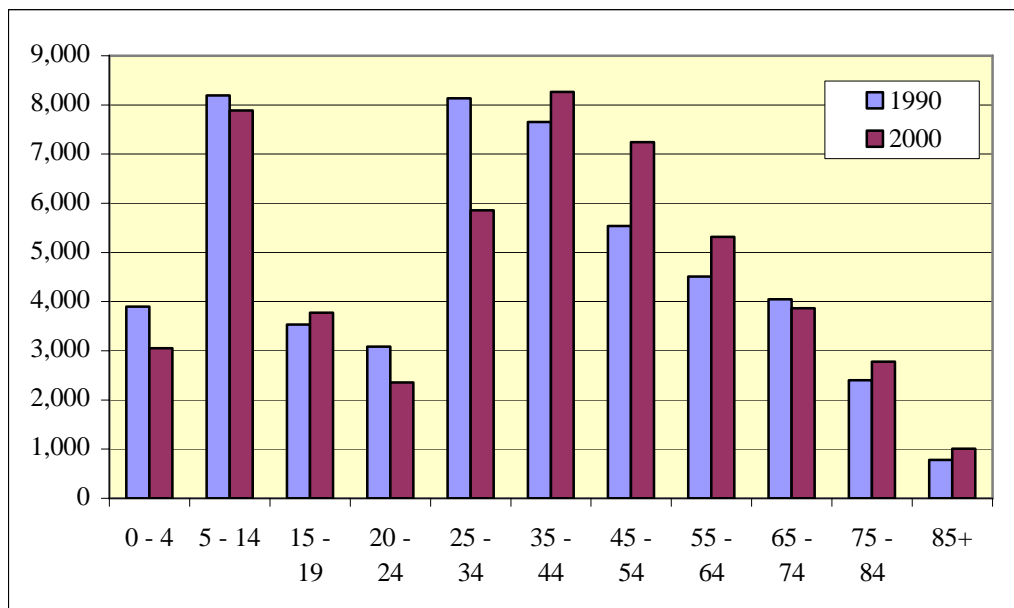
Source: U.S. Census Bureau, 1990 - 2010. Source for Projections: ESRI Business Information Solutions

Age Distribution

Consistent with a general trend affecting upstate New York, from 1990 to 2000, Chenango County experienced significant population declines in the under 5 and 20 to 34 age groups. This appears consistent, as couples between the ages of 20 and 34 are more likely to have younger children; younger residents between the ages of 20 to 34 also have a tendency to leave for college or for job opportunities.

As is illustrated in Graph 3, every age cohort over 35 years old, with the exception of those aged 65 to 74 years, experienced an increase in population between 1990 and 2000. The largest increase occurred in the 45 to 54 years, where there was a 40% increase in population. Similar to the U.S. and the State, the median age from 1990 to 2000 increased. The median age in Chenango County in 2000 was 38.4 years, a 13% increase the 1990 median age of 33.9. A main reason for the increase in median age may be that older residents remained in the County between 1990 and 2000 while younger residents, such as those between the ages of 20 and 34, left for college or for job opportunities.

Graph 3: Population by Age Group 1990 – 2000



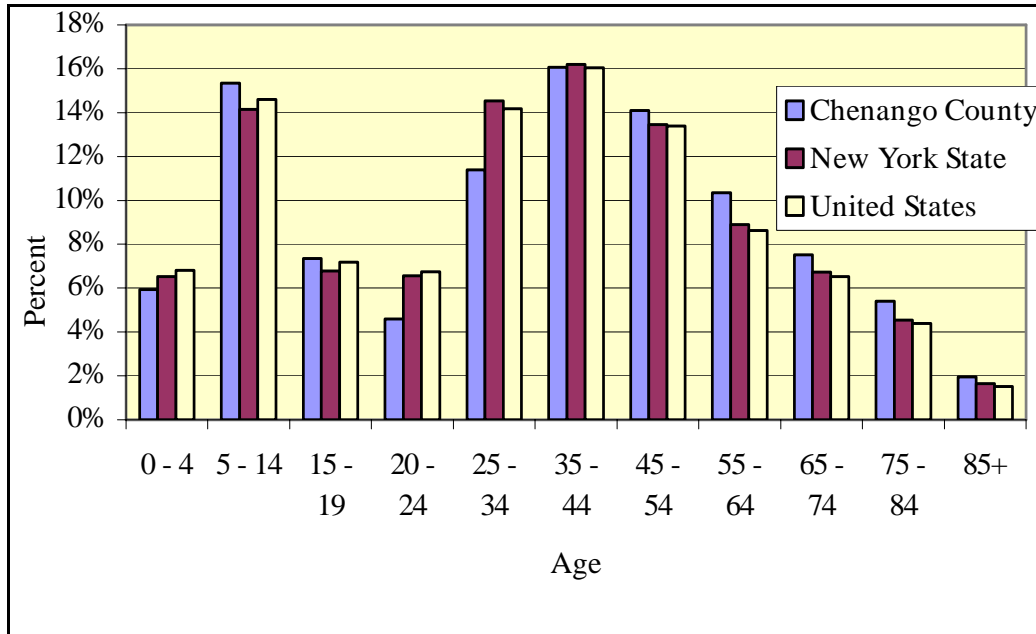
Source: U.S. Census Bureau, 1990, 2000.

As seen in Graph 4 and Table 3, Chenango County's age group distribution differs from that of New York State and the United States. According to the 2000 U.S. Census, the County had a higher percentage of residents aged 45 and over than New York State and the U.S. Chenango County had a slightly higher percentage of younger residents, aged 5 to 19, than the State and U.S. However, the County has a significantly lower percentage of residents aged 20 to 34 years.

In examining the census data, it is evident that Chenango County and the six county region have a higher share of older residents than the U.S. and State. The U.S. Census reports that Chenango, Broome, and

Delaware Counties all experienced a negative natural increase between 2003 and 2004 (i.e. there were more deaths than births). This directly affects labor force characteristics, such as percentage of residents in the workforce.

Graph 4: Population By Age in Chenango County, 2000



Source: U.S. Census Bureau, 2000

Table 3: Comparison of Population by Age, 2000

Age	Chenango County		New York State		United States	
	Total	%	Total	%	Total	%
0 - 4	3,054	5.90%	1,239,417	6.50%	19,175,798	6.80%
5- 14	7,885	15.30%	2,684,290	14.10%	41,077,577	14.60%
15 - 19	3,775	7.30%	1,287,544	6.80%	20,219,890	7.20%
20 - 24	2,357	4.60%	1,244,309	6.60%	18,964,001	6.70%
25 - 34	5,856	11.40%	2,757,324	14.50%	39,891,724	14.20%
35 - 44	8,262	16.10%	3,074,298	16.20%	45,148,527	16.00%
45 - 54	7,244	14.10%	2,552,936	13.50%	37,677,952	13.40%
55 - 64	5,314	10.30%	1,687,987	8.90%	24,274,684	8.60%
65 - 74	3,868	7.50%	1,276,046	6.70%	18,390,986	6.50%
75 - 84	2,779	5.40%	860,818	4.50%	12,361,180	4.40%
85+	1,007	2.00%	311,488	1.60%	4,239,587	1.50%
Total	51,401	100.00%	18,976,457	100.00%	281,421,906	100.00%
Median Age	38.4		35.9		35.3	

Source: U.S. Census Bureau, 1990, 2000

Housing

As of 2000, there were 23,890 housing units in Chenango County, 83.4% of which were occupied. There was a 7.8% increase in total housing units during the 1990s, which was approximately the same rate of increase for most of the surrounding counties (except Broome County).

Owner occupied units made up 75.3% of total occupied housing units in Chenango County. Renter occupied units made up approximately 24.7%. This proportion of housing tenure changed only nominally between 1990 and 2000.

It is interesting to note that 2000 Chenango County's vacancy rate, at 16.6%, is exceptionally higher than the State and National vacancy rates. This was a 22% increase from 1990. In addition, it is 8% higher than the State and National vacancy rate in 2000. On average, there was a 2 to 3% increase in vacancy rates between 1990 and 2000 in the six county region.

Almost half of the vacant housing units in Chenango County were for seasonal, recreational, or occasional use. This represents a decrease of about 5% since 1990. Between 1990 and 2000, the number of vacant units for sale in Chenango County grew by 90%, while the number of units on the rental market increased by 75%.

Table 4: Housing Inventory, 1990 and 2000

Characteristics	1990		2000		1990 - 2000 %
	Number	%	Number	%	Change
Total housing units	22,164	100.00%	23,890	100.00%	7.80%
Occupied housing units	19,141	86.40%	19,926	83.40%	4.10%
Vacant housing units	3,023	13.60%	3,964	16.60%	31.10%
Occupied housing units	19,141	100.00%	19,926	100.00%	4.10%
Owner-occupied housing units	14,240	74.40%	15,005	75.30%	5.40%
Renter-occupied housing units	4,901	25.60%	4,921	24.70%	0.40%
Vacant housing units	3,023	100.00%	3,964	100.00%	31.10%
For rent	350	11.60%	611	15.40%	74.60%
For sale only	263	8.70%	500	12.60%	90.10%
Rented or sold, not occupied	167	5.50%	239	6.00%	43.10%
Seasonal, recreation, or occasional	1,655	54.70%	1,951	49.20%	17.90%
Other vacant	583	19.30%	661	16.70%	13.40%

Source: U.S. Census Bureau, 2000, 1990

As indicated in Table 5, detached single-family homes (60% of total in 2000) and mobile homes (23% of total in 2000) 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 1990s occurred among detached single-family homes (an increase of 1,293 units). Mobile homes or other ranked second, with an increase of about 620 units. Multi-family developments containing 20 or more family homes increased by 55% – the highest percentage increase between 1990 and 2000.

With the exception of Multi-family developments containing 20 or more family homes, multifamily housing in Chenango County was less prevalent in 2000 than in 1990. Both attached and detached single-family homes were the most popular housing development type during this period.

Table 5: Type of Specified Owner-Occupied Units, 1990 and 2000

Unit Type	1990		2000		1990 - 2000 % Change
	Total	%	Total	%	
1Family, detached	13,056	58.90%	14,349	60.10%	9.90%
1Family, attached	165	0.70%	233	1.00%	41.20%
2 Family	1,688	7.60%	1,510	6.30%	-10.50%
3 or 4 Family	1,197	5.40%	1,120	4.70%	-6.40%
5 to 9 Family	600	2.70%	494	2.10%	-17.70%
10 to 19 Family	227	1.00%	163	0.70%	-28.20%
20 + Family	311	1.40%	481	2.00%	54.70%
Mobile home or other	4,920	22.20%	5,540	23.20%	12.60%
Total	22,164	100.00%	23,890	100.00%	7.79%

Source: U.S. Census Bureau, 1990, 2000

Housing Value

The 2000 Census recorded a 12% increase in the value of specified owner occupied units in Chenango County. Approximately 55% of all owner occupied² homes in Chenango County are valued between \$50,000 and \$99,999. 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 U.S. increased by more than 50% during that time.

Approximately 55% of all owner occupied homes in Chenango County are valued between \$50,000 and \$99,999. This figure more than doubles the State and National percentage. In addition, over 87% of homes are valued below \$99,999 and over 95% below \$149,999. Only 5% of all owner occupied homes are valued at \$150,000 or above, compared to 33% at the National level and 49% at the State level.

The median home value increased about 14% in Cortland, Madison and Otsego Counties and 11% in Delaware County during the 1990s. The exception was Broome County, which experienced a decrease in median home value of about 4%.

Education

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.

² The U.S. Census Bureau defines specified owner occupied housing as single-family homes built on less than 10 acres.

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 20% lack 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 have an impact on the extent of the County's future economic growth.

Table 6: Educational Attainment, 2000

Attainment Level	Chenango County		New York State	United States
	Number	%	%	%
Less than 9th grade	1,932	5.60%	8.00%	7.50%
9th to 12th grade, no diploma	4,744	13.80%	12.90%	12.10%
High school graduate	13,702	39.90%	27.80%	28.60%
Some college, no degree	5,936	17.30%	16.80%	21.00%
Associate degree	3,084	9.00%	7.20%	6.30%
Bachelor's degree	2,901	8.40%	15.60%	15.50%
Graduate or professional degree	2,064	6.00%	11.80%	8.90%
Total	34,363	100.00%	100.00%	100.00%

Source: U.S. Census Bureau, 2000

Household Composition

It is also evident from the Census data that non-family households are increasing while family households are decreasing in Chenango County. Family households decreased by 2% from 1990 to 2000, while married couple families with children decreased by 19%. The number of non-family households increased by about 20% since 1990.

Table 7: Comparison of Household Composition, 2000

Type	Chenango County		New York State	United States
	Total	%	%	%
Total households	19,926	100.00%	100.00%	100.00%
Family households	13,546	68.00%	65.70%	68.10%
Married-couple family	10,571	53.10%	46.60%	51.70%
With children < 18 years	4,660	23.40%	22.70%	24.80%
Other Family (No Spouse Present)	2,975	14.90%	19.10%	16.40%
With children < 18 years	2,145	10.80%	11.80%	10.70%
Non-family households	6,380	32.00%	34.30%	31.90%
Householder living alone	5,194	26.10%	28.10%	25.80%
Households With children < 18 years	6,805	34.20%	34.50%	35.50%
Households below Poverty Level	2,574	12.90%	13.90%	11.80%
Average household size	2.52		2.61	2.59
Average family size	3.01		3.22	3.14

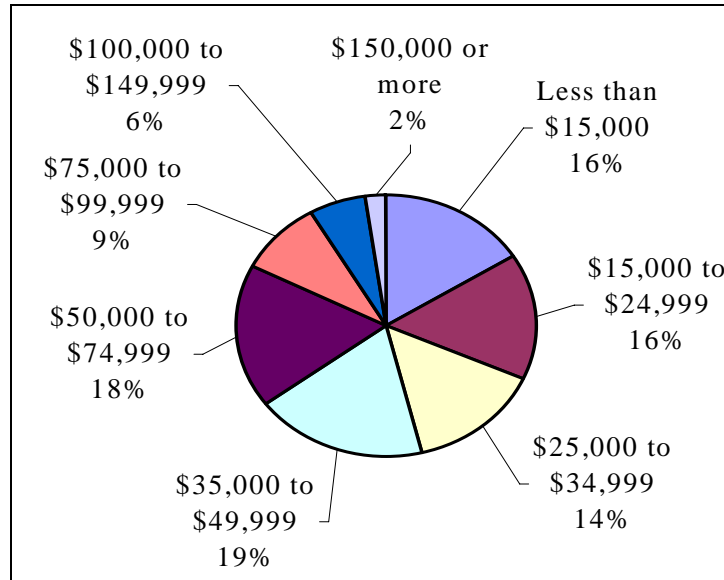
Source: U.S. Census Bureau, 2000

The average family size and average household size in Chenango County decreased during the 1990s. Part of the reason for this is the increase in single-person households between 1990 and 2000. Of Chenango County's 19,926 households in 2000, 26% were single-person households. This represents a 17% increase from 1990. Additionally, the number of residents aged 65 years and older living alone increased by 11% in the 1990 Census, and in the 2000 Census, they made up approximately 12% of Chenango County households. The State's figure is similar at 10%.

Income

Despite Chenango County's population decline, the County significantly gained in income between 2000 and 2005. 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%.

Chart 1: Chenango County Household Income, 2005



Source: Source Market Profile: ESRI Business Information Systems

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.

Table 8: Household Income, 2000

Income	Chenango County		New York State	United States
	Number	%	%	%
Less than \$15,000	3,790	19.10%	17.90%	15.80%
\$15,000 to \$24,999	3,393	17.10%	11.70%	12.80%
\$25,000 to \$34,999	3,118	15.70%	11.40%	12.80%
\$35,000 to \$49,999	3,643	18.30%	14.80%	16.50%
\$50,000 to \$74,999	3,534	17.80%	18.40%	19.50%
\$75,000 to \$99,999	1,390	7.00%	10.60%	10.20%
\$100,000 to \$149,999	744	3.70%	9.10%	7.70%
\$150,000 or more	280	1.40%	6.20%	4.60%
Households	19,892	100.00%	100.00%	100.00%
Median Household -1990	\$26,032		\$32,965	\$30,056
Median Household -2000	\$33,650		\$43,582	\$42,164
Median Family -1990	\$39,711		\$39,741	\$50,046
Median Family -2000	\$39,668		\$51,783	\$50,046

Source: U.S. Census Bureau, 2000

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

As evidenced in Table 9, which includes employment by industry data from 2000, most Chenango County jobs, as is the case with many other upstate New York counties, are in Education/Health/Social Services related industry (24%), manufacturing (21%), and retail (11%). In 2000, these top three ranking industries made up approximately 55% of total employment held by residents in Chenango County. As seen in Table 9, these industries are also the top three sectors for the United States in 2000. New York State shares two top sectors with the County. The third ranking industry in the State is Professional, Scientific, Management, Administration, and Waste.

Table 9: Employment by Industry, 2000*

Industrial Sector/Industry	Chenango County		New York State	United States
	Number	%	%	%
Agriculture/Forestry/Fishing/Hunting/Mining	883	3.90%	0.60%	1.90%
Construction	1,353	6.00%	5.20%	6.80%
Manufacturing	4,938	21.70%	10.00%	14.10%
Wholesale Trade	580	2.60%	3.40%	3.60%
Retail Trade	2,418	10.60%	10.50%	11.70%
Transportation/Warehousing/Utilities	961	4.20%	5.50%	5.20%
Information	703	3.10%	4.10%	3.10%
FIRE/Rental and Leasing	1,266	5.60%	8.80%	6.90%
Professional/Scientific/Mgmt/Admin/Waste Mngt Services	1,123	4.90%	10.10%	9.30%
Educational/Health/Social Services	5,350	23.60%	24.30%	19.90%
Arts/Entertainment/Recreation/Accommodation/Food Svs	1,195	5.30%	7.30%	7.90%
Other Services	938	4.10%	5.10%	4.90%
Public Administration	1,006	4.40%	5.20%	4.80%
Total	22,714	100.00%	100.00%	100.00%

*Highlights denote most popular sectors of employment in Chenango County; Bold indicates majority employment;

Source: U.S. Census Bureau, 2000

As illustrated in Table 10, the top three occupation types among working residents in Chenango County in 2000 were management/professional (29.5%), sales/office or administrative support (22.8%) and jobs related to production, transportation and material (19.9%). The top two occupations in the County are also the top two for the State and the U.S.

Table 10: Resident Occupation, 2000

Occupation Type	Chenango County		New York State	United States
	Total	%	%	%
Management/Professional	6,697	29.50%	36.70%	33.60%
Service industry	3,416	15.00%	16.60%	14.90%
Sales/Office and Admin Support	5,170	22.80%	27.10%	26.70%
Farming/Fishing/Forestry	414	1.80%	0.30%	0.70%
Construction/Extraction/Maintenance	2,496	11.00%	7.60%	9.40%
Production/Transportation/Material	4,521	19.90%	11.70%	14.60%
Total	22,714	100.00%	100.00%	100.00%

*Highlights denote most popular sectors of employment in Chenango County, NY and U.S.

Note: Bold indicates majority employment

Source: U.S. Census Bureau, 2000

As seen in Table 11, Chenango County had a fairly low unemployment rate in 2000 of 3.4%, which is closer to the U.S. unemployment rate of 3.7% than the State unemployment rate of 4.3%. However, the percentage of individuals in the labor force, at 60.9%, was lower in Chenango County than it was in either the State at 61.1% or the National at 63.9%. This reflects the County's older population base.

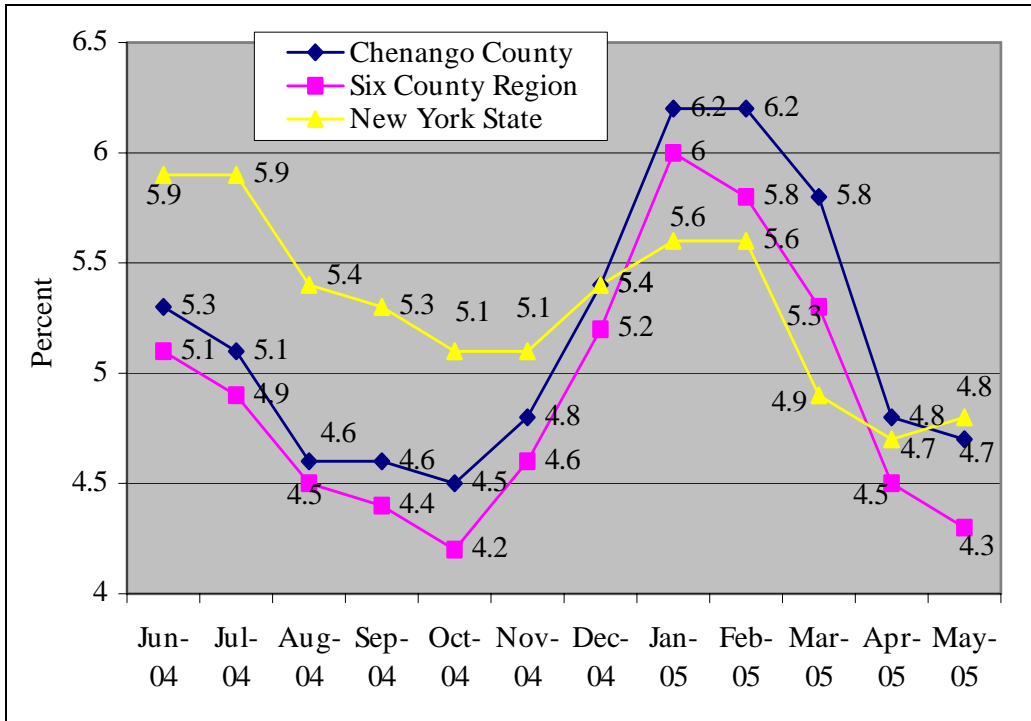
Table 11: Employment Status, 2000

Labor Force	Chenango County		New York State	United States
	Total	%	%	%
In the Labor Force	24,075	60.9%	61.1%	63.9%
Employed civilian population 16+	22,714	57.5%	56.6%	59.7%
Unemployed civilian population 16+	1,342	3.4%	4.3%	3.7%
Armed Forces	19	0.0%	0.2%	0.5%
Not in Labor Force	15,460	39.1%	38.9%	36.1%
Total Population 16 years +	39,535	100.0%	100.0%	100.0%

Source: U.S. Census Bureau, 2000

As seen in Graph 5, Chenango County's unemployment rates followed similar trends as the six county region between June 2004 and May 2005. Generally, unemployment rates for the County and region were lower than the State's during the summer and fall, and higher in the winter and spring months. However, during this time period, the six county region had on average lower unemployment rates than the County during all seasons.

Graph 5: Unemployment Rates, 2004 – 2005



Source: New York State Department of Labor, 2005

III. Community Resources Inventory

The western half of Chenango County is primarily rural. The more developed area is the City of Norwich and its adjacent communities. The southeast corner of the County is fortunate to have direct access to I-88. Most of the County's municipalities do not have zoning. The Norwich area houses a Lowes, a Wal-Mart, and a shopping center. The nearest mall is located in Oneonta, approximately 33 miles away. Much of the County lacks direct interstate access.

Transportation Accessibility

The 2002 Regional Transportation Plan included a comprehensive assessment of accessibility options in the Chenango County. Much of the following information has been excerpted from that Plan. See Map 1, Base Map, to identify the locations of interstate, State and local roads.

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 State 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 northeast corner of the County to the southeast 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 1,651 AADT near the Madison County line to 6,289 near its intersection with County Route 35. NYS Route 12 varies from 2,977 near the Madison County line, to 15,394 in the City of Norwich near its County Route 10A intersection. NYS Route 23 varies from 750 near by its County Route 10 intersection, to 6,005 in the City of Norwich near its NYS Route 12 intersection. NYS Route 80 varies from 621 near Smyrna to 2,789 near the Otsego County line. NYS Route 206 varies from 2,114 near the Delaware County line to 6,613 near NYS Route 7 in Bainbridge.

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 2004 indicated traffic volumes of 11,100 between exits 7 and 8, and 12,200 between exits 8 and 9.

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 has been a topic for a while, mentioned even in the 2003 Chenango County Economic Development Plan. While completion of the entire route's reconstruction will take time, \$30 million has been appropriated for Phase I. Phase I includes activities to mitigate existing transportation problems, between Utica and Binghamton, encompassing the four counties of Oneida, Madison, Chenango, and Broome. Once completed, these improvements will greatly benefit the employers located along the NYS Route 12 corridor, potentially stimulating economic and business growth.

Motor Freight Transportation Services

LTL (less than truck load) and truckload freight services are critical to economic development efforts, both from an attraction and from a business retention perspective. While at one time, most major freight was moved by water or rail, today only very heavy and/or international freight now moves via water or rail. Trucks are also now trans-continental, traversing North American borders relatively seamlessly.

Large long distance haulers are located primarily in Syracuse. Companies such as Estes Express Lines have more than 15,000 trailers and 4,000 tractors, with terminals located throughout the country, including Syracuse. A Duie Pyle Inc. is a major regional motor freight carrier with a Syracuse terminal. While smaller than Estes, they have more than 1,400 trailers and 500 tractors. While A Duie Pyle Inc.'s is principally located in the northeast, Estes operates nation-wide. Both Estes Express Lines and A Duie Pyle Inc have terminals throughout New York State's major cities. Con-Way Central Express, located in Marcy, is a large company involved in motor freight transport. B&G Truck Lines, a local hauler in Greene, provides local services in Chenango County.

Rail Service

Freight service is maintained on the New York Susquehanna and Western Railway, which operate a short line between Binghamton and Utica. Links are provided to CSX Transportation in Syracuse and North Bergen, New Jersey; the Canadian Pacific Railway in Binghamton; and Norfolk Southern in Binghamton and Passaic Junction, New Jersey.

Air Service

Lieutenant Warren Eaton Airport

Lieutenant Warren Eaton Airport is located on NYS Route 12 in North Norwich. 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. Major local corporations such as Procter and Gamble Pharmaceuticals have historically used the airport for daily flights between Norwich and Cincinnati, Ohio. While there are no regularly scheduled commercial flights, general charter service is available.

There are currently plans underway for the construction of a \$1.4 million parallel taxi-way at Lieutenant Warren Eaton Airport. It is anticipated that the upgrades will provide better access and service for the aviation community, as the expanded runway will enable larger jet craft to use the facilities.

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 for surrounding communities located in New York's Southern Tier and in Northern Pennsylvania.

The Greater Binghamton Airport offers multiple services and airlines. Benefits include the Airport's congestion-free facility, easy accessibility, state of the art passenger services, and strong air services. The Airport hosts an annual Greater Binghamton Air Show.³

As a major regional airport, the following major airline carriers serve the Greater Binghamton Airport: Delta, Northwest, United Express, and US Airways.

³ The Greater Binghamton Air Show was not held in 2005 due to the scheduled runway rehabilitation project. The annual Air Show is scheduled to occur in 2006.

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. A major regional airport, it is served by the following major air carriers: American Eagle, Continental, Delta, JetBlue, Northwest, United Express, USAirways, and TransMeridian. 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).

Mass Transit

Chenango County Public Transit (CCPT) provides services on regular routes throughout the County, as well as “on-call” services. 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, McDonough, South Otselic, New Berlin, Earlville and Greene. Fares are \$1 (50 cents for seniors and/or disabled), and monthly passes are just \$30. CCPT also provides for an on-call service throughout the entire County (with a 24-hour advance scheduling). For the on-call program, there are two zones in the County; the near zone is \$3 per trip, while the more remote zone is \$6.

Chenango County Employment

Chenango County has one city, twenty-one towns, and eight villages with no single jurisdiction predominating. Norwich, as the County’s only city, houses approximately 14% of the County’s population and is the County’s most densely populated area. Notwithstanding, the County is sparsely populated, with less than one resident for every ten acres.



Eaton Center

From a county perspective, the spatial distribution of these major employers, as well as the diverse nature of the businesses and the mix of local and non-local enterprises, provides both stability and additional strength to the County’s economy. Recent firm expansions (such as the \$2.5 million expansion by Golden Artist Colors), underlie the basic attraction of Chenango County for industry.

The County houses a strong base of industrial machine shop and fabrication services firms, mostly in Norwich, Greene and Sherburne. In addition, pharmaceuticals and banking and insurance continue to have a strong presence in the County, as they have historically.

Greater Norwich Area

The largest concentration of employers with more than fifty employees is in the greater Norwich area. In order by number of employees, the largest employers are NBT Bank, N.A., Chenango Memorial Hospital, Norwich City Schools, Unison Industries, DCMO BOCES, Procter & Gamble Pharmaceuticals, Citizen/Frontier Communications, OSG Norwich Pharmaceuticals, Valley Ridge CIT, Snyder

Communications, Wal-Mart, Opportunities for Chenango, Inc., Kerry Bio-Science, CWS (Community Workshop), Doris L. Patrick Retirement Facility, Price Chopper Supermarkets, Norwich Aero Products, The Mang Group, Valley View Nursing Home, Tops Friendly Markets, the Norwich Family YMCA, and Apple Converting. A number of other companies with less than fifty employees are located in Norwich, including firms such as Chenango Union Printing, Culture Kits, Electron Coil Co. Inc., Label Gallery, and in North Norwich, Rea-D Pak Foods Inc. While jobs with Chenango County government are distributed throughout the County, many of the 550 County employees are also in Norwich.

Greene

The County's single largest employer is the Greene-based Raymond Corporation with 910 full time employees as of January 2006. Greene, the second largest community in the County, houses about 11% of the population. The Greene Central School employs more than 200 persons. Raymond Corporation and the Greene Central School district are the only Greene area employers with more than fifty employees. Other notable businesses located in Greene include Cross Country Manufacturing, G.C. Controls Inc., Gilbert Machine & Tool Company, MJ Taylor Manufacturing, and L.A. Najarian, Inc.

Sherburne

Sherburne's largest employer is the Sherburne-Earlville School district. Other major employers are Lok-N-Logs, Chenango Valley Pet Foods, and The Mid-York Press. Somewhat smaller companies in Sherburne include Chenango Valley Technologies, Columbus Woodworking, Hamilton Products, Jenzura Manufacturing Company, Mid-York Distributors, Sherburne Metal Products Inc., Smith Tool & Die Inc., and Steel Sales Inc.

Oxford

Oxford has the New York State Veteran's Home, Oxford Academy Central School, and the Blueox Corporation. Some of the smaller companies in Oxford include Automecha and Gallery 3-2-1.

New Berlin

New Berlin has Preferred Mutual Insurance Corporation, one of the largest private sector employers in the County. New Berlin also houses the Unadilla Valley Central School district, Chase Memorial Nursing Home, and Golden Artist Colors.

Bainbridge/ Afton/ South Otselic/ Smyrna

The Bainbridge Guilford School is the largest employer in Bainbridge. Afton's largest employers are IVCI, a telephone contractor, and Afton Central Schools. Also in Afton is RMJ Enterprises. South Otselic's main employers are the Otselic Valley Central Schools and Gladding Cordage. Finally, rounding out the major employers is Gladding Braided Products, LLC in South Otselic.

Downtown Main Streets

Like many New York State counties, Chenango County has several downtown “Main Streets.” Once the center of retail activity, several recent trends have negatively impacted these areas. First, many large national (or international) “big box” retailers have located in suburban and rural areas of Chenango County and nearby counties, displacing smaller, locally-owned downtown retailers. While such developments are representative of national trends in retail evolution, on a local level it is difficult for small businesses to compete with these larger retail conglomerates and the retail activity inevitably results in retail leakage.



A CBD in Chenango County

Second, increasing Internet sales has also had an impact on local retail sales and employment. Industry analysts report that Internet sales have grown more than 20% annually since 2002, and in 2005 will account for \$172 billion in national retail sales. A September 2005 report released by Forrester Research⁴ forecasts Internet sales will account for 13% of all U.S. retail sales by 2010. Forrester suggests that travel will remain the largest category,⁵ followed by women’s products, small appliances, and jewelry.

Third, it has been well established that retail employment tends to follow manufacturing employment. As manufacturing in Chenango County has declined in recent years, so has retail trade. Retail trade decreased by 20% during the 1990s, from average employment of 3,220 in 1990 to 2,566 in 2000. In 2003, it was estimated to have declined by 5.9% since 2000.

Despite this, Chenango County, in 2004 and 2005, experienced a trend of new small retail establishments—such as coffee shops, clothing boutiques, and Internet cafes—opening for business in the County’s downtown areas. While many of these located in the County’s largest downtown, Norwich, several settled in the smaller downtowns of Bainbridge, Greene, New Berlin, Oxford, and Sherburne. Each of these downtowns also include National Historic Districts.

The City of Norwich, which has a Business Improvement District (BID) to oversee its Main Street revitalization efforts, has followed many of the interests laid out in the City’s 2003 Comprehensive Plan. That Plan recommended the City pursue special events and tourism activities and facilitate second floor housing rehabilitation to foster a vibrant downtown. Other recommendations included continuing efforts to preserve the City’s historic architecture; developing a comprehensive strategy to improve the appearance of the Museum District; developing resources to maximize the impact of cultural and arts offerings in the County; and drafting a parks and recreation strategy.

⁴ Forrester Research is an independent technology and market research company that focuses on the business implications of technology change. It is traded on NASDAQ.

⁵ Travel, although a component of retail trade, is discussed more specifically in this plan as Tourism.

Norwich has also seen several of its older structures refurbished recently to house government activities. The Norwich Fire Department is investing \$3.1 million in renovating and expanding its existing 1912 fire station. The 1900 Norwich City Club building houses the City of Norwich Police Headquarters and the combined Chenango County and City of Norwich Emergency Management Offices recently underwent a \$1 million renovation. The former freight train depot underwent a \$440,000 renovation and now houses the City Court offices. The former train ticket station depot was renovated in 1997 at a cost of \$375,000 and now houses the City of Norwich Administrative offices.

The City's Business Improvement District was awarded \$200,000 in November 2005 through the State's Main Street Program, which is designed to stimulate downtown revitalization by providing funding for building renovations, streetscape enhancements and downtown business or cultural anchors.

The Village of Bainbridge was originally settled in 1786 as "Jericho". The Village has identified historic driving tours visitors can follow to see some of the Village's historic buildings and sites. According to the Bainbridge Chamber of Commerce, the Village's most storied building is the 1805 Central Hotel, which now houses the Olde Jericho Tavern. The General Clinton Canoe Regatta is a large annual event held on the banks of the Susquehanna River. Main Street shopping in Bainbridge includes several antique shops, a florist/gift shop, and a number of restaurants. Main Street also houses the Bainbridge Museum, which, in addition to its Native American and local industrial product exhibits, hosts Senior Meals three times each week, the Antique Auto Club's meetings, and is available for rent for small parties.

The Village of Greene, established in 1798, was named for Gen. Nathaniel Greene, a Revolutionary War soldier. The Village's historic district includes more than 100 properties, both commercial and residential uses. The Raymond Corporation, the fork lift manufacturer, is based in the Village off Main Street. Main Street houses a number of local eateries, as well as the Moore Memorial Library and the Greene Museum, a once-monthly museum that houses collections of Native American artifacts, World War I items, and local historical artifacts.

The Village of New Berlin is located along the eastern edge of Chenango County. The Village's historic district includes 122 residential and commercial properties. Preferred Manor, built in 1831 was a stop on the Underground Railroad and houses one of only two indoor weathervanes in existence. Owned by Preferred Mutual Insurance Company, the building is now operated as a Bed and Breakfast. Main Street houses a number of retail shops, dining establishments, and two libraries.

The Village of Oxford houses many retail establishments, including numerous antique and collectibles shops, galleries, and florists. Other businesses include restaurants, pizzerias, cafes, ice cream parlors, and the Blue Stone Golf Club. "Promote Oxford Now," known as PON, is a local business and resident association that works together to promote the Village's businesses, while preserving the Village's historic character and culture. A second generation to the Oxford Revitalization Project, Inc., a non-profit established several years ago that focused on preservation efforts. One of its major success stories was

refurbishing and replacing the Village’s “pagoda” back to Washington Park, from where it had been removed years earlier.

The Village of Sherburne was originally founded as Paris in 1795. The local historic district includes both commercial and residential structures. The Village is home to the annual Sherburne Pageant of Band, during which dozens of high school bands descent on the area to compete. Held during the first week of June each year, the event features a parade, concert, and field events and draws as many as 20,000 spectators. Downtown Sherburne houses a variety of locally owned small retailers and dining establishments.

Education Resources

Public and Private Primary and Secondary Schools

Chenango County has a number of public school districts, the majority of which cross County lines. De Ruyter Central School District is in Cortland and Madison Counties, with a small area in the extreme northwest corner of Chenango County. The Georgetown-South Otselic District stretches across the Madison County line, as does the Sherburne-Earlville District and a small portion of the Unadilla Valley District. This latter district also extends into Otsego County, as does the Gilbertsville-Mt. Upton District. The Sidney district is mostly in Delaware County, but extends slightly into Chenango County. Both Afton and Harpursville Districts extend into Broome County, as does a small portion of Greene. Cincinnatus stretches across the County line into Cortland County. The Norwich City School District and the Oxford District are the only districts 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 pre-kindergarten 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 Chenango County in 2003, moving to an existing vacant school building.

According to Milford Academy, the school’s 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 embarking on their post-secondary 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 now for issuing a local diploma versus a Regents diploma, with Regents students needing to pass a certain number of Regents exams and at specified levels, in order to qualify for graduation. By 2008, all graduating high school seniors will be required to meet one standard, and that standard will be 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 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 also a concern to educators as well, teachers and administrators are 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 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. 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.

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 economic development. OFC's Community Economic Development program focuses on microenterprise development, and, as such, is designed to create community wealth, generate family assets, and increase economic security for low to moderate income residents of Chenango County. The Bullthistle Rag Enterprise, designed to educate, motivate, and inspire fiber and textile craftspeople interested in starting their own business, is a major part of this effort.

The Bullthistle Rag Enterprise project is a well-crafted example of a progressive program facilitated through the partnership of several entities, including Catholic Charities of Chenango County, Made in Chenango Gift Shop and Gallery, Chenango United Way, Cornell Cooperative Extension, Chenango County Chamber of Commerce, and CDO Workforce Development. The Bullthistle Rag Enterprise Textile Studio is located at the Catholic Charities Roots & Wings facility in Norwich. OFC provides technical assistance with business planning, marketing, and product development; financial assistance via several resources including a revolving loan fund; access to equipment, raw materials and supplies; and a work facility, that doubles as a small business incubator as well. OFC also assists budding entrepreneurs with basic job skills and assistance in goal setting and achievement.

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 jobs continue to be in strong demand.

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 indentifying 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 will 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 phone services to incoming students.



SUNY Morrisville in Norwich

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

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. One example is Ivys Cream, a very successful homegrown ice cream start-up based out the College's central campus, where its Agriculture Department is located.

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

Historic Resources

Chenango County is rich with historic landmarks throughout the area, which create a strong base for historic tourism. Chenango County houses a variety of historic resources, such as office buildings, schools, barns, post offices, districts, and churches. Table 12 lists historic resources listed on the National Register of Historic Places and documented by the NYS Office of Parks, Recreation, and Historic Preservation.

Table 12: Historic Places and Buildings in Chenango County

Town or City	Name	Type	Period of Significance
Bainbridge	Bainbridge Historic District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924
Bainbridge	Hovey, Charles C., Residence And Strong Leather Company Mill	Mill	1875-1899, 1900-1924
Columbus	Columbus Community Church	Church	1825-1849, 1875-1899
Coventry	District 4 School	School	
Coventryville	District School 2	School	
Earlville	Earlville Historic District	District	1825-1849, 1850-1874, 1875-1899, 1900-1924
Earlville	Earlville Opera House	Opera house	1875-1899
Greene	Bates Round Barn	Barn	1925-1949
Greene	Clinton-Rosekrans Law Building	Office	1800-1824, 1825-1849, 1850-1874, 1875-1899
Greene	Greene Historic District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924, 1924-1949
Greene	Young Round Barn	Barn	1900-1924
Guilford Center	Guilford Center Presbyterian Church	Church	
McDonough	Calvary Episcopal Church	Church	1875-1899, 1900-1924
New Berlin	Beardslee Farm	Farm	
New Berlin	Moss, Horace O., House	House	1825-1849
New Berlin	New Berlin Historic District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924, 1924-1949
Norwich	Chenango County Courthouse District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899
Norwich	Methodist-Episcopal Church of Norwich	Church	1850-1874, 1875-1899, 1900-1924
Norwich	North Broad Street Historic District	District	1825-1849, 1850-1874
Norwich	US Post Office--Norwich	Post Office	1925-1949
Oxford	Burr, Theodore, House	House	1822, 1810
Oxford	Oxford Village Historic District	District	1750-1799, 1800-1824, 1825-1849, 1850-1874
Oxford	US Post Office--Oxford	Post Office	1925-1949
Pitcher	Pitcher Baptist Church and First Congregational Church of Pitcher	Church	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924, 1924-1949, 1950-1974
Sherburne	Sherburne High School	School	1900-1924, 1925-1949
Sherburne	Sherburne Historic District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924, 1924-1949
Smithville Flats	Smithville Valley Grange No. 1397 **	Church	1825-1849, 1850-1874, 1875-1899, 1900-1924
Smyrna	Smyrna Elementary School	School	1925-1949
South Otselic	Newton Homestead*	Museum	1850-1874
South Otselic	South Otselic Historic District	District	1800-1824, 1825-1849, 1850-1874, 1875-1899, 1900-1924, 1924-1949
Upperville	Upperville Meeting House	House	1875-1899
Afton	Main Street Historic District	District	1850-1874, 1875-1899, 1900-1924, 1925-1949

Source: New York State Historic Preservation and National Register of Historic Places

* Gladding International Sport Fishing Museum, **First Universalist Society Church; Smithville Community Center

Chenango County Historic Districts

There are ten historic districts in Chenango County, usually located in or around the main street of a Town, Village, or City. Most of the County's historic districts are mixed use with both commercial and residential buildings.

The Court House District, the Village of Oxford Historic District, and the North Broad Historic District have walking tour brochures explaining the history of the district and describing the significance of the local architecture.

Chenango County Historical Societies

Chenango County residents have established historical societies to pass on community knowledge and understanding of the historical resources to the next generation. At least nine local Chenango County communities have historical societies in place that meet and hold activities regularly. The Chenango County Historical Society and the Bainbridge Historical Society have museums open to the public with limited hours. See the tourism write up following historic resources for additional information on the County's museums.

Vacant Historic Structures

According to the National Register of Historic Places, there are three vacant historic structures in Chenango County. These include the Charles C. Hovey House and Strong Leather Company Mill; the Sherburne High School; and the Smyrna Elementary School. There are also vacant buildings located in the County's various historic districts. Vacant historic structures, in addition to the significance associated with their role in history, also pose potential opportunities for creative, adaptive reuse.

The Chenango Canal

During the construction of the Erie Canal, local leaders from Chenango Valley lobbied New York State government for a canal to connect Binghamton and Utica. Constructed alongside the Chenango River, the Chenango Canal was 97 miles long. In addition to linking western New York with the southern tier, the Chenango Canal also connected the Susquehanna River to the Erie Canal.

Completed in October 1836, the Chenango Canal operated from April to November each year until 1876. Cutting the travel time between Binghamton and Albany from nine days to four, the canal's construction resulted in a manufacturing boom in Chenango County. Unfortunately, the construction of a railroad in Chenango County rendered the canal obsolete.

Major Tourism Resources in Chenango County

Although rural, Chenango County's communities offer a number of unique attractions and resources. Many of the local municipalities hold special events, rooted in local history, throughout the 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 local Native American, settler history, and historical society museums.

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 made the Northeast Classic Car Museum, which was an identified goal in the County's 1996 Economic Development Strategy and Action Plan possible. The Northeast Classic Car Museum has three buildings housing at least six exhibits and more than 100 cars on display. In February 1998, the museum earned their own charter and tax exempt 501(c) 3 non-profit status.



Source: Northeast Classic Car Museum

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 in participating in museum activities and with 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 an 1896 former school building, Ward School No. 2. Visitors can research Chenango County history, prominent individuals, businesses, topography, and genealogical research. The source material includes primary resources such as historians, family folders, census information, scrapbooks, and reference books.

Norwich Pharmacal Museum

The Norwich Pharmacal Museum is located at the Eaton Center. 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 laboratory instruments. 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. While the County houses many resources, two examples have been profiled here.

Black Bear Farm Winery

The Black Bear Farm Winery, opened in 2002, is located in the Town of Greene at the northwest corner of Chenango County, approximately 15 miles away from 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: fruits, floral wines using dandelions, hard ciders, and meads (wines fermented using honey).

The Black Bear Farm Winery has been recognized with awards twice for its cider and four times for its wines. The Finger Lakes International Competition recognized Black Bear's 2002 vintage cider and in 2003, the Indiana State Fair recognized the Black Bear's cider.

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

Norwich Pumpkin Festival

The City of Norwich holds an annual pumpkin festival. The Norwich Pumpkin Festival has a variety of community activities and competitions. Contests include a pumpkin carving challenge, a scarecrow contest, and a pumpkin bake off. Entertainment provided include performance artists--who hold a haunted theater show-- and musical venues. Other activities include the fall season's agriculture produce, which include bakes sales and a harvest dinner, and a haunted house.

Cultural Resources

Chenango County has many cultural resources located throughout the region. Much more information on these resources is available on the County's website and in publications produced by the County Chamber of Commerce. Two sample resources are discussed in the following paragraphs. 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 County. 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 nationally known performers. The Earlville Opera House maintains a website with a calendar section,



Earlville Opera House
Source: Chenango County Online Visitors Travel
guide://www.chenangocounty.org

which they keep open to local groups to post announcements on local community events and attractions.

The Chenango County Council of Arts

The Chenango County Council of Arts, located in the City of Norwich, supports and encourages arts and humanities throughout the County. The Council of Arts provides a variety of services to the community. The arts center houses a gallery, performances, school events, special events, and classes that attract people from all over, locally, nationally, and even internationally. The Council of Arts also contributes to the community through a variety of grants, including decentralized grants, local capacity grants, grants for teachers, and grants for individual artists.

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. There are five major festivals and community events, which include Gus Macker Basketball Tournament, Colorscape Chenango, Chenango County Bluesfest, and the Chenango County Fair. In 2004, Colorscape Chenango Arts Festival drew approximately 14,000 attendees, the County Fair drew approximately 25,000 attendees, the Blues Festival drew approximately 4,150 attendees, and the Gus Maker Basketball Tournament drew approximately 10,000 attendees.⁶ Two representative events are profiled in the following paragraphs.

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. Today the race record, as of 1990, is 6 hours 34 minutes 34 seconds.

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 following 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 at the children’s stage.

⁶ Chenango County Council of the Arts. “Chenango County Cultural Plan. Prepared by River Street Planning & Development, LLC. 2004.

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.

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 waterbodies. Table 13 lists camping establishments in Chenango County and their accommodations.

Table 13: Camp Sites in and surrounding Chenango County

Camp Sites	Camping Sites/Cabins	Lake, Pond, Pool or River	Hot Showers	Flush Toilets	Electric	Water Hookup	Sewer Hookup	Hiking Trails	Cross Country Skiing	Recreational Activities
Bowman Lake	198	Lake	x	x				x	x	x
Chenango Shores	65				x	x				x
Chenango Valley	216-24		x	x				x	x	x
Cook Park	40	Pond						x		x
Dixson's Riverside	30	River	x		x	x	x			x
Echo Lake	80-29	Lake						x		x
Gilbert Lake	221-33	Lake	x	x					x	x
Hunt's Pond	18	Pond						x	x	x
Riverside, RV	17		x	x	x		x			x
Tall Pines	34	Pool	x	x	x	x				x
Twin Brooks	75	Pool			x	x	x	x	x	x
Yogi Bear's Jellystone Park		Pool and Lake	x	x	x	x	x			x

Source: Portions of the Chenango County Chamber of Commerce Travel Guide

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 14 lists the State managed areas according to the NYSDEC. Following the table is a description of places of interest in Chenango County.

Table 14: NYSDEC Managed State Lands

<p>FORESTS</p> <ul style="list-style-type: none"> 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 	<p>FORESTS CONTINUED...</p> <ul style="list-style-type: none"> 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 Whaupanaucan State Forest Willey Brook State Forest <p>PARKS</p> <ul style="list-style-type: none"> Bowman Lake State Park Oquaga Creek State Park <p>TOWER SITE</p> <ul style="list-style-type: none"> Berry Hill Fire Tower Site <p>CAMPSITE</p> <ul style="list-style-type: none"> Hunts Pond State Campground <p>WILDLIFE MANAGEMENT AREA</p> <ul style="list-style-type: none"> Pharsalia State Wildlife Management Area <p>EDUCATION CENTER</p> <ul style="list-style-type: none"> Rogers Environmental Education Center
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Source: NYSDEC website

Rogers Environmental Education Center

There are numerous fully staffed, NYSDEC Environmental Education Centers disbursed throughout the State. These education centers offer classes, educate people on environmental awareness, and hold special events. Open year-round, these education centers also have trails for hiking and environmental exhibits.

The NYSDEC-operated Rogers Environmental Education Center is dedicated to teaching people about natural resources and resource conservation. The 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. Some programs are designed to meet specific group needs such as badge requirements and specific skill sets. Workshops include teacher workshops and weekend public programs, available to families and individuals. The Center also provides education on natural history and the environment through its Naturalist Intern Program and the Rogers Environmental Interpretation Institute.

The Rogers Environmental Education Center holds the Winter Living Celebration every January. This special event includes many winter activities and attractions.

Hunt's Pond Campground

Hunt's Pond Campground is a small NYSDEC-owned campsite located in South New Berlin. The park offers 18 campsites, a picnic area, and a boat launch. While the campground does not have established trails, there are trails located on adjacent NYSDEC property that is available for use for hiking, snowmobiling, and cross-country skiing. A portion of the park is open for hunting during deer season.

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.

Oquaga Creek State Park

Oquaga Creek State Park, located in Bainbridge, surrounds a 55-acre lake named Artic Lake. The Park houses beach facilities, forested campsites, and walking and hiking trails. Winter recreation at Oquaga Creek State Park includes snowshoeing, cross country skiing, and ice fishing.

Pharsalia State Wildlife Management Area

The 4,625-acre Pharsalia Wildlife Management Area can accommodate a variety of activities. Visitors can hike, fish, bird watch, cross-country ski, snowshoe, hunt, fish, and trap.

State Forests

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. Today, the State of New York uses Unit Management Plans (UMP) to assess the natural resources of State forests and lands.

Unit Management Plans in Chenango County

The NYSDEC division of land and forests assess the natural resources of State forests management areas, and parks to identify opportunities to accommodate public use and sustain the natural resources. Unit Management Plans (UMP) is the written document that identifies the State's land resources. The NYSDEC has four UMPs in Chenango County.

Table 15: UMPs in Chenango County

Name of State Land	Counties	Acres
McDonough Area State Forests	Chenango	13,781
Northern Chenango Highlands Area State Forest	Chenango	13,686
Treaty Line	Broome, Chenango, and Delaware	17,626
Six State Forests near the Town of Coventry	Broome and Chenango	5,400

Source: UMP for State Forest Lands, NYSDEC website

Six State Forests near the Town of Coventry

The NYSDEC division of land and forests is in the process of writing a Unit Management Plan (UMP) for six State forests in Chenango County. Most of the UMP forests are in or border the Town of Coventry. Through the UMP, NYSDEC intends to assess the resources and identify recreational opportunities.

The properties to be inventoried through this UMP process include Coventry State Forest (Chenango RA #27), Bobell Hill State Forest (Chenango RA's #10 and 30), Beaver Flow State Forest (Broome and Chenango RA #1), Bumps Creek State Forest (Chenango RA #33), and the Oak Ridge State Forest (Chenango RA #13). Through the UMP, NYSDEC intends to address recreation, timber, watershed, biodiversity, and other natural resources on the 5,400 acres of State land.

Treaty Line Unit

Treaty Line Unit is located in Broome, Chenango, and Delaware Counties with a total of 17,626 acres. The forests in Chenango County are located in the southeastern corner of the County in the Town of Afton. The only State forest in Chenango County included in Treaty Line Unit is Melondy Hill (Chenango # 9 and # 15).

Northern Chenango Highlands Unit

The Northern Chenango Highlands Unit is located in the northwestern corner of Chenango County in the Towns of Lincklaen, Otselic, Pitcher, and Smyrna. The Northern Chenango Highland Unit is known for its high elevations in Chenango County. The highest point is 1,980 feet above sea level and is located in Beaver Meadow. There is a total of 13,686 acres of State land this UMP. The State lands included are Beaver Meadow (Chenango #2), Lincklaen (Chenango #18 and #23), Bucks Brook (Chenango #20), Otselic (Chenango 21), and Beaver Meadow (Chenango #25). In February of 2000, the Northern Chenango Highlands Unit was accepted.

McDonough Management Unit

McDonough Management Unit is located in the central western Chenango County in Towns McDonough, Preston, and Smithville. The State lands included are Bowman Creek State Forest (Chenango #1), Ludlow Creek State Forest (Chenango #6), Genegantslet State Forest (Chenango 26), and Bowman Lake State Park. In August of 1999, the McDonough Management Unit was accepted.

The 13,781-acre McDonough State Forest is located in the Town of McDonough. The Finger Lakes Trail and the New York State Corridor Snowmobile Trail pass through the Park. Fishing opportunities are available at Whaley's Pond, Bowman Creek, and Mill Brook. The park also has facilities to accommodate camping, swimming, and other recreation.

The Berry Hill Fire Tower is located in the Town of McDonough in the McDonough State Forest. Erected in 1934 by the CCC, the 59' 3" International Derrick tower was given to New York State by the US Forest Service. The tower ceased operation in 1988 and was placed on the National Historic Lookout Register in 1993. The tower is still accessible to the public.

New York State Hatchery

The NYSDEC runs 12 hatcheries throughout the State of New York. The hatcheries produce about several million fish annually, or approximately one million pounds of fish per year. The fish produced include brook trout, brown trout, rainbow trout, lake trout, steelhead, chinook salmon, coho salmon, landlocked salmon, walleye, muskellunge, and tiger muskellunge.

The Village of South Otselic hosts one of the 12 NYSDEC hatcheries, called the South Otselic Hatchery. The fish produced at the South Otselic Hatchery are tiger muskellunge, pond-reared walleye fingerlings,

rainbow trout, and heritage-strain brook trout. The annual production in the South Otselic Hatchery is 15,000 pounds of fish annually.

Natural 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 programs oriented towards economic development, including:

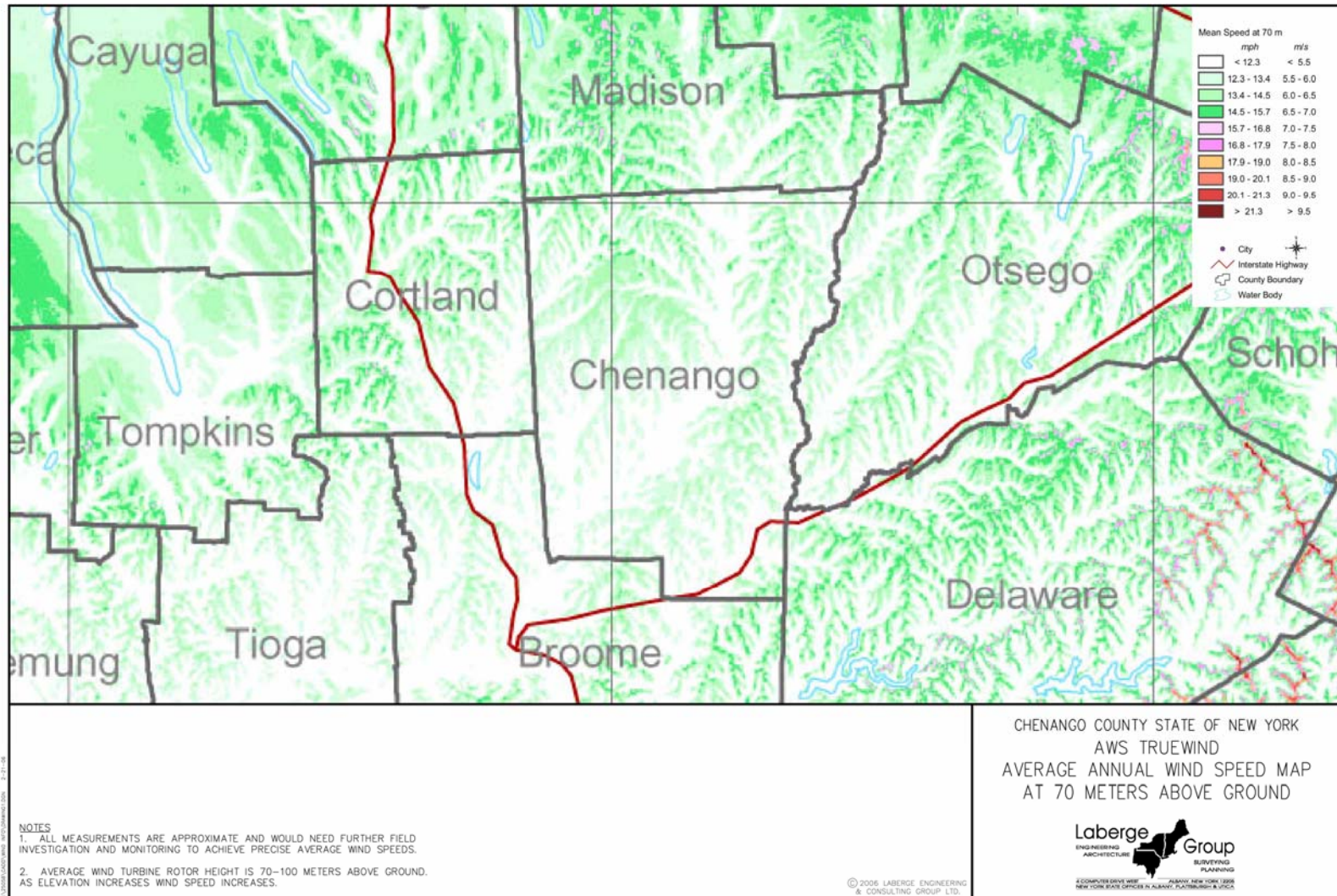
- Economic Revitalization Incentive;
- Economic Development Incentive;
- Economic Development “Zone” Incentive;
- Economic Development Power;
- Incubator Development Incentive;
- Power for Jobs;
- Business Retention Incentive;
- Small Business Growth Incentive;
- Farm Waste Generating System Option;
- Wind Electric Generating System Option; and
- Electric Hybrid Generating System Option.

Wind Energy

Wind generation of electric power has been suggested as a possibility in the County. In general, large-scale wind power is not economic at average wind speeds below 15 miles per hour (mph). Such sustained wind speeds at 70 meters above ground (a standard for most large commercial wind generators) are only seen on a few ridge tops in the north central and northeast areas of the County (please see Map 2 for more information). New technologic advances that bring the average wind speed down even 1 mph would open up substantially more area for potential development.

It should be noted here that while the average wind speeds are not conducive to major utility-type wind generation (often referred to as “wind farms”), there may be individual economic usefulness for private owners in the County. This might include existing farms and other businesses that have significant enough loads that development of a wind turbine might offer a reasonable return of investment over a period of years. It is best that such installations are located so they can be tied into the existing electric grid so as to be able to sell any power not used, and to have a back up if the turbine fails temporarily. However, it is difficult for an individual farmer to get the capital funds necessary (\$100k-\$150k) to establish such an alternate energy source system.

Map 2: Average Annual Wind Speed Map



Natural Gas

Gas provision in the County is provided by New York State Electric & Gas (NYSEG), which maintains current rate information on its website. NYSEG offers different rates for its various available services, such as natural gas provision or connection lines transportation.

In 2002, a major gas project was proposed that would deliver natural gas from the Town of Lebanon in Madison County to the Village of Greene, and ultimately to the Raymond Corporation, the Village (and one of the County's) major employers. The \$28 million project has had great support, including up to \$5 million dollars promised from the State's Empire State Development agency. The goal of this project, was to not only gain existing jobs, but also to stimulate the creation of hundreds of new jobs over a three year period⁷. The Chenango County Chamber of Commerce worked closely with the Raymond Corporation, Nornew, Inc., NYSERDA, and the Chenango County Planning Department on this and, as of this writing,⁸ negotiations are progressing, and it is hoped that the pipeline will begin construction soon.

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 Cellular One and Verizon. Once connected through phone lines, there are a multitude of Internet access providers. Internet service is also available from cable companies serving the County, including Adelphia and Time-Warner.

Rivers and Water Resources

Lakes and Ponds

The lakes and ponds in Chenango County are primarily used for recreational activities including fishing, swimming, and waterfront camping. Chenango County houses many ponds and lakes, especially in the NYS parks, forests, and education centers. Chenango County's most popular fishing lakes, ponds, and rivers are listed in Table 16.

⁷ Chenango County Chamber of Commerce website. www.chenangony.org.

⁸ December 2005 phone interview.

Table 16: Fishing Opportunities in Chenango County

Rivers, Lakes, Creeks, and Ponds	Fishing Opportunities
Chenango River	Walleyes, Northern Pike, Chain Pickerel, Largemouth Bass, Smallmouth Bass, Panfish
Otselic River	Bass, Trout
Unadilla River	Walleyes, Chain Pickerel, Largemouth Bass, Smallmouth Bass, Panfish
Bowman Creek	Bass, Trout
Canasawacta Creek & East Branch	Smallmouth Bass
Cold Brook	Bass, Trout, Smallmouth Bass
Genegantslet Creek	Bass, Trout, Smallmouth Bass
Handsome Brook	Bass, Trout, Smallmouth Bass
Ludlow Creek	Bass, Trout
Lyon Brook	Bass, Trout
Balsam Pond	Norlunge, Largemouth Bass, Panfish, Chain Pickerel
Bowman Lake	Rainbow Trout, Smallmouth Bass
Chenango Lake	Norlunge, Largemouth Bass, Smallmouth Bass, Chain Pickerel, Panfish
Cook's Pond	Largemouth Bass, Chain Pickerel, Panfish
Guilford Lake	Largemouth Bass, Panfish, Walleyes, Chain Pickerel, Rainbow Trout
Hunts Pond	Largemouth Bass, Chain Pickerel, Panfish
Cook's Pond	Largemouth Bass, Chain Pickerel, Panfish
Jackson Pond	Northern Pike, Largemouth Bass, Panfish
Jeffrey Pond	Brook Trout
Long Pond	Bass, Panfish, Norlunge, Chain Pickerel
Round Pond	Chain Pickerel, Panfish

Source: Fishing Opportunities in Chenango County. Chenango County Tourism Website

Rivers

Chenango River

A tributary to the Susquehanna River, the 90-mile Chenango River flows through Madison, Chenango, and Broome counties in New York's southern tier region. The River drains in the northern end of the Susquehanna watershed. The Chenango Canal, in use from 1836-1878, was developed along the Chenango River to connect Utica with Binghamton.

In 2004, nine NYS communities were awarded grants through the New York Drinking Water and Clean Water State Revolving Fund program. These interest free funds provide financing for drinking water and water pollution control projects. The Village of Sherburne received \$190,000 for design and construction activities associated with rehabilitating the Village's antiquated sanitary sewer system. This effort will contribute to improving the water quality of Chenango River.

Susquehanna River

The 410-mile Susquehanna River is the 16th longest river in the United States. As an outlet for Otsego Lake in Cooperstown, New York, tributaries for the Susquehanna include the Chenango and Unadilla Rivers. From its origin in New York State, the Susquehanna River passes through Pennsylvania and Maryland, eventually draining in the Chesapeake Bay, an arm of the Atlantic Ocean.

In 2005, American Rivers, an environmental group, designated the Susquehanna “America’s Most Endangered River.” The river’s major pollutants are animal manure and urban and suburban runoff. In 1970, the United States Congress and the legislatures of New York State, Pennsylvania and Maryland adopted the Susquehanna River Basin Compact, to coordinate and develop the river’s water resources. Through the Compact, the Susquehanna River Basin Commission, a Harrisburg, Pennsylvania-based non-profit, was created to coordinate preservation efforts.

Due to its historical significance and great length, the Susquehanna River also provides an opportunity for ecotourism. Local events celebrating the river’s history include Bainbridge’s Canoe Regatta, held annually in honor of General Clinton. The Canoe Regatta is discussed in the tourism sub-section.

Unadilla River and Otselic River

The Unadilla and the Otselic Rivers are two smaller rivers in Chenango County. The Unadilla River passes through Otsego, Madison, and Chenango Counties, flowing into the Susquehanna River. The Otselic River is approximately 45 miles long and a tributary of the Tioughnioga River. The Otselic River is known for fishing, especially for bass and trout fishing.

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. The Southern Tier East Regional Planning Development Board has an infrastructure update planned for Chenango County in early 2006. 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 recent⁹ discussions with 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 Village of Smyrna. 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 County¹⁰, 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 removal 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.

Commercial Real Estate Inventory

Chenango County's 2003 Interim Economic Development Action Plan identified the need for the County to develop an industrial property inventory so that it can better assist businesses find appropriate space. Since adoption of that Plan, the County (through the Chamber of Commerce) has worked on achieving this goal. While the Chamber does not "shovel-ready" industrial space, it does work with businesses to facilitate occupancy, helping them find appropriate space. Detailed descriptions of vacant properties located within the Empire Zone are posted on the Empire Zone's website. There is definitely 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 been concerned that working with area economic developers might preclude their receiving a commission on a sales or occupancy.

Through conversations with a number of realtors as well as information from local assessors and other sources, a snapshot of Chenango County's available commercial and industrial properties was developed 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

⁹ Chenango County Department of Health December 2005 phone interview.

¹⁰ The State has two waste discharge and sewage treatment facilities; one is for the fish hatchery at Otselic, and the other services the Veterans Home in Oxford.

estate inventory must be updated daily. 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.

The following available sites inventory includes formal real estate property listings, but is not exhaustive. Rather than including properties that are exclusive to one type of use, only flexible space was listed. It should be noted that many of the County’s current (December 2005) available commercial properties are single-use facilities, such as restaurants, bed and breakfasts, golf courses, etc. Given the limited appeal of these properties, they have been omitted from the inventory. However, if the Chamber were to develop and maintain an up-to-date inventory of available commercial properties, it would be appropriate to include these dedicated use properties as well.

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.

As mentioned previously, realtors may have information on properties that, while the owner is interested in selling, may not be formally listed. Several properties in the City of Norwich that are not formally listed but may be available for sale include: the 30,000 square foot, Victory properties on Borden Avenue; 9.4 acres of vacant riverfront land off of Pleasant Street; a 137,000 square foot storage building on 38 acres with municipal water and sewer on Borden Avenue; and, finally, a 4-acre property owned by Unison.

Table 17: Available Commercial, Retail and Industrial Properties - Chenango County - as of December 8, 2005 *

Property Type	Place	Location	Land Size	Building Size (square feet)	Price	Other
Downtown Comm	Norwich	Broad	117X50	3 story/5,514	\$485,000	
Comm/Industrial	Smyrna	Rt 80	30 acres	2,600	\$435,000	400 amp service, large barn, house
Commercial	Sherburne	N Main St	90X200	1,900	\$89,000	public sewer
Comm/Retail	Sherburne	N Main St	.06 acre	1,254	\$60,000	public water/sewer
Comm/Industrial	Sherburne	W State St		8,832	\$73,000	public water/sewer
Downtown Comm	Oxford	N Canal	80X70	2,800	\$149,000	public water/sewer
Comm/Industrial	Oxford	Rt 12		4,800	\$350,000	
Downtown Comm	Norwich	Broad	118X43	3 story	\$550,000	
Downtown Comm	Norwich	S Broad	23X80	3,680	\$129,000	public water/sewer
Commercial	Norwich	Rt 32	5+ acres	1,000	\$200,000	on river across from proposed resort
Commercial	Norwich	American Ave	158X144		\$150,000	public water/sewer
Commercial	Norwich	Rt 12S	vacant land		\$80,000	near Wal-Mart, fronts rail
Commercial	Norwich	Rt 32	65X82	1,900	\$40,000	
Comm/Retail	Norwich	Rt 12N	125X250	1,530	\$350,000	public water/sewer
Comm/Retail	Norwich	Rt 12S		4,300	\$330,000	
Comm/Retail	Norwich	Rt 12N	3.3 acres		\$270,000	public water/sewer
Comm/Retail	Norwich	Rt 12S	65X275	5,000	\$150,000	
Comm/Professional	Norwich	E. Main	99X249	4,270	\$250,000	public water/sewer
Comm/Professional	Norwich	Birdsall	132X145	11,000+	\$200,000	public water/sewer
Comm/Industrial	Norwich	Rt 12N	149X110	2,800	\$250,000	public water/sewer, EDZ
Comm/Retail	New Berlin	Rt 8	230X170	1,216	\$35,000	
Comm/Industrial	New Berlin	Hovey Ln			\$16,000	
Industrial	Greene	Cherry	33 acres	23,000	\$900,000	all public utilities & muni power, parking
Industrial	Greene	Cherry	3.2 acres	19,000	\$295,000	all public utilities & muni power, parking
Commercial	Greene	Genessee	40X100	4,000	\$190,000	all public utilities & muni power
Commercial	Greene	Rt 12S	180X100	3,200	\$145,000	
Comm/Retail	Greene	Genessee	74X80	7,500	\$215,000	all public utilities & muni power
Comm/Retail	Greene	near Main	21X62	1,100	\$40,000	all public utilities & muni power
Comm/Professional	Greene		52X165	7,600	\$210,000	all public utilities & muni power, historic
Comm/Professional	Greene	Genessee	40X100	4,400	\$170,000	all public utilities & muni power, historic
Industrial	Bainbridge	Whitney Way	1.2 acres	None	\$30,000	public water/sewer, close to I-88
Industrial	Bainbridge	Whitney Way	1.1 acres	None	\$30,000	public water/sewer, close to I-88
Commercial	Bainbridge	River Rd	192X165	2,400	\$129,000	close to I-88
Comm/Industrial	Bainbridge	Rt 39		11,680	\$425,000	close to I-88
Comm/Industrial	Bainbridge	Scott St		6,000	\$119,000	public water/sewer, I-88
Comm/Industrial	Bainbridge	Pruyn St	Irregular	2,089	\$110,000	public water/sewer, I-88, EDZ
Comm/Industrial	Afton	Rt 7	50 acres		\$500,000	gravel pit, close to I-88

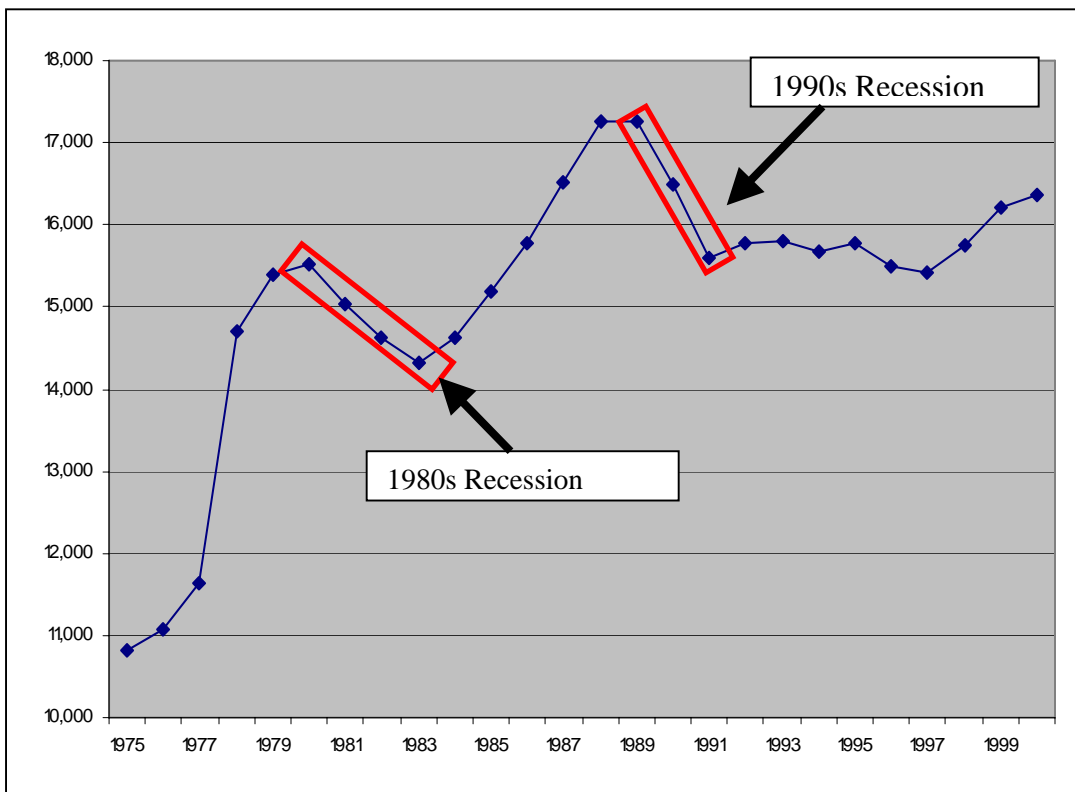
Source: MLS Listing Service. * The table above does not include full information on each property, as it was intended to present an example of an inventory spreadsheet. Please note that "Price" has been rounded to the closest thousand. Blank cells indicate lack of data.

IV. Economic Industry Analysis Summary

Introduction

Total employment in Chenango County has gradually increased over the past 30 years, despite the two economic recessions in the 1980s and 1990s. While Chenango County's economy appeared to rebound quickly from the early 1980s, it took slightly longer to recover from the 1990s recession. After 1997, Chenango County employment rose steadily throughout 2000. However Chenango County's employment decreased after 2001.

Graph 6: Total Average Employment in Chenango County, 1975 – 2000



Note: The above industrial sector data is organized according to the standard industrial classification data (SIC).
Source: U.S. Bureau of Labor Statistics, 1975 - 2000

Economic Assessment Technique

As part of this Economic Development Strategic Plan, an economic base and employment trends analysis of each of Chenango County's industrial sectors was conducted using employment data for the years 1990 – 2003. In developing the analysis, employment was used as a measure of economic strength. As part of the trends analysis, an assessment of each industrial sector has been conducted using location quotient (LQ) and shift share analysis.

For comparative purposes, data for Broome, Cortland, Delaware, Madison, and Otsego Counties as well as for New York State is presented.

Data Source

The source of the data used in this section is the *ES-202/QCEW Program*, a Federal-State program jointly run by the U.S. Bureau of Labor Statistics (BLS) and the State Employment Security Agencies. The data is derived from quarterly tax reports submitted to State Workforce Agencies by employers subject to State Unemployment Insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program. Each quarter, State agencies process the data and send the information to BLS.

The following sector analyses uses average yearly employment figures, meaning that the monthly employment sum is divided by 12, as reported by *ES-202*. Each sector's average wages are calculated by dividing the total wages for the year by the average monthly employment. Using employment averages, as opposed to using the sum of actual employment at mid-March as the Economic Census does, avoids having to decipher data gaps resulting from U.S. Census Bureau data suppression.¹¹ Due to the limited information resulting from data suppression, certain industry divisions are often consolidated. For most NYS counties, consolidating "Agriculture, Forestry and Fishing" with "Mining" and "Unclassified" yields employment totals that may be disclosed to the public without jeopardizing the confidentiality of individual employer data".¹²

In the following analyses, the Standard Industrial Classification (SIC) as well as the North American Classification System (NAICS)¹³ is used. SIC codes are used to compare data between 1975 and 2000. NAICS is used when comparing more recent data, specifically 2000 – 2003 data. It should be noted that NAICS created a larger number of industrial sub classification fields, which skews industry sector

¹¹ Data suppression is very common for smaller geographic areas as it prevents the disclosure of private and confidential information. This data suppression is pursuant to Section 537 of the Labor Law, which requires that information provided by individual employers be kept confidential.

¹² New York State Bureau of Labor Market Information.

¹³ Employment data is generally classified under NAICS. Industrial classification codes organize industrial sectors according to similarities in services, products, and production (Manufacturing, Retail Trade, Services, etc.). NAICS replaced the SIC system after 1997. The SIC system was oriented more towards the manufacturing sector, and was determined to be an antiquated form of industrial classification. NAICS was developed in response to the increasing prevalence of service and information industries in the latter part of the twentieth century.

employment totals. For this reason, the 2000 SIC employment sector totals differ from the 2000 NAICS totals and are not entirely comparable.¹⁴

Location Quotient

Calculating location quotient (LQ) is one technique used to identify the significant industrial sectors located within an established geographic location. The U.S. Bureau of Labor Statistics (BLS) defines LQ as ratios that compare the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. The presence of the identified resource or activity is evaluated by the extent to which it differs from the larger area or base. In other words, the LQ determines whether one area's contribution to a certain sector or industry is greater or less than some larger reference economy; the larger reference economy usually being the United States. For this analysis, New York State, regarded as a more meaningful basis for comparison, is used as the larger reference economy.

LQ values can indicate whether a community is producing more than is needed and exporting the excess to non-local markets, or if it is not producing enough to support the local demand for that particular product or service. Generally, LQs greater than 1.00, especially those greater than 1.25, indicate that the community produces an excess and is most likely exporting to non-local markets (industries that export are known as “basic” sector industries). An LQ equal to 1.00 suggests the industry meets local needs only (industries that only serve the local market are known as “non-basic” sector industries). An LQ of less than 1.00, especially those less than .75, indicates the community is not producing enough to support the local demand, which most likely leads to market leakage, which is described in the Market and Segmentation Business section of this document.

The LQ figures used in the following analyses were calculated using the following method:

$$\text{LQ} = \frac{\% \text{ of County Employment in Activity X}}{\% \text{ of New York State Employment in Activity X}}$$

Location Quotient Major Findings

Six County Region Employment Growth, 1990 - 2000

As seen in the Table 18, four industry sectors were found to be “basic” sectors in the region during the 1990s (i.e. sectors that met regional needs and/or exported excess to surrounding areas). Those industry sectors were: Public Administration, Agriculture, Mining & Unclassified, Retail Trade, and Manufacturing. Two of these four industry sectors also grew in employment during the 1990s: Public Administration and Agriculture, Mining & Unclassified.

¹⁴ For example, the 2000 SIC retail trade industry employment totals do not equal the 2000 NAICS retail trade industry employment totals. However, the total number of employees for all industries in 2000 is very similar if not equal for both SIC and NAICS.

Despite significant job losses during the 1990s, as indicated in Appendix A, the Retail Trade and Manufacturing sectors maintained a substantial presence in the region's economy in 2000, accounting for nearly 40% of the six county region's total employment.

Table 18: Six County Region Location Quotient & Exporting Assessment, 1990 –2000

SIC Sector	Sector Meeting Region's Needs/ Exporting Excess		
	2000 LQ	No	Yes
Services	0.95	X	
Public Administration	2.00		X
Transportation & Public Utilities	0.61	X	
Agriculture, Mining & Unclassified	1.00		X
Finance, Insurance & Real Estate	0.47	X	
Wholesale Trade	0.70	X	
Retail Trade	1.21		X
Construction	0.85	X	
Manufacturing	1.74		X

*Italics denotes employment growth; bold indicates industrial sector with an LQ of 1.00 or greater.

Source: U.S. Bureau of Labor Statistics, 1990 –2000

As seen in Table 19, five industry sectors were found to be “basic” sectors in the region in 2003 (i.e. sectors that met regional needs and/or exported excess to surrounding areas). Those industry sectors were: Public Administration, Agriculture, Forestry, Fishing & Hunting, Mining, Retail Trade, and Manufacturing. Three of these five industry sectors grew employment between 2000-2003: Public Administration increased by 2.4%; Agriculture, Forestry, Fishing & Hunting grew by 33%; and Manufacturing grew by 0.5%. One sector, Mining, showed no change between the period, and Retail Trade declined by 2.4%. Although it is difficult to generalize comparisons between the two data sets because of the differences between SIC and NAICS, it would appear that the sectors that were basic during the 1990s continued to be basic through to 2003, this would include Public Administration, Agriculture, Mining, Retail Trade, and Manufacturing.

Table 19: Six-County Region Location Quotient & Exporting Assessment, 2000 - 2003

NAICS Sector	Sector Meeting Region's Needs/ Exporting Excess		
	2003 LQ	No	Yes
Public Administration	1.28		X
Finance, Insurance & Real Estate	0.54	X	
Unclassified	0.4	X	
Services	0.84	X	
Construction	0.83	X	
Agriculture, Forestry, Fishing, Hunting	1.33		X
Mining	1.88		X
Wholesale Trade	0.67	X	
Transportation & Public Utilities	0.77	X	
Retail Trade	1.2		X
Manufacturing	1.92		X

*Italics denotes employment growth; bold indicates industrial sector with an LQ of 1.00 or greater.
Source: U.S. Bureau of Labor Statistics, 2000 – 2003

Chenango County Employment Growth, 1990 - 2000

Five sectors in Chenango County experienced employment growth during the 1990s: Services, Construction, Public Administration, Agriculture, Mining & Unclassified, and Transportation & Public Utilities, in descending order. Together these sectors represented 51% of the County's total 2000 employment.

With LQs greater than 1.00, the Construction, Public Administration, Agriculture, Mining & Unclassified, Retail Trade, and Manufacturing sectors all met County needs, capturing their local share of consumer expenditures, or were exporting excess goods. Basic industrial sectors provide significant benefits to a local area, as they create new jobs within the region, generate larger revenues, and capture non-local dollars.

Three of the sectors that experienced employment growth in the County export to non-local markets: Construction, Public Administration, Agriculture, Mining & Unclassified. Conversely, the Services and Transportation & Public Utilities sectors experienced an employment growth, but failed to keep up with local demand, instead experiencing a significant leakage of consumer dollars.

The sectors that experienced employment growth in Chenango County during the 1990s also grew in the six county region, with one exception: the Construction sector. Construction sector jobs in Chenango County increased by 8%, while Construction sector jobs declined by 13% at the regional level. The Wholesale Trade and Finance, Insurance and Real Estate sectors grew at the regional level during the 1990s, but suffered job losses in the County during the same period.

Table 20: Chenango County Location Quotient & Exporting Assessment*, 1990 – 2000*

SIC Sector	Sector Meeting Region's Needs/ Exporting Excess		
	2003 LQ	No	Yes
Services	0.8	X	
Construction	1.03		X
Public Administration	1.36		X
Agriculture, Mining & Unclassified	1.11		X
Transportation & Public Utilities	0.6	X	
Finance, Insurance & Real Estate	0.62	X	
Wholesale Trade	0.4	X	
Retail Trade	1.03		X
Manufacturing	2.45		X

*Italics denotes employment growth; bold indicates industrial sector with an LQ of 1.00 or greater.
Source: U.S. Bureau of Labor Statistics, 1990 –2000

As seen in Table 21, five industry sectors were found to be “basic” sectors in the region in 2003 (i.e. sectors that met regional needs and/or exported excess to surrounding areas). Those industry sectors were: Public Administration, Agriculture, Forestry, Fishing & Hunting, Mining, Retail Trade, and Manufacturing. One of these five industry sectors grew employment between 2000-2003: Public Administration employment grew by 413 or 10.5%. Those industry sectors that were not meeting the County’s needs but grew with employment were Finance, Insurance & Real Estate with 276 employees, Unclassified with 16 employees, and Transportation with 11 employees.

Table 21: Chenango County Location Quotient & Exporting Assessment, 2000 - 2003

NAICS Sector	Sector Meeting Region's Needs/ Exporting Excess		
	2003 LQ	No	Yes
Public Administration	1.6		X
Finance, Insurance & Real Estate	0.89	X	
Unclassified	0.4	X	
Transportation & Warehousing	0.73	X	
Agriculture, Forestry, Fishing & Hunting	1.33		X
Mining	1.88		X
Wholesale Trade	0.37	X	
Retail Trade	1.13		X
Construction	0.74	X	
Services	0.58	X	
Manufacturing	2.8		X

*Italics denotes employment growth; bold indicates industrial sector with an LQ of 1.00 or greater.
Source: U.S. Bureau of Labor Statistics, 2000 – 2003

Growing Industries in Chenango County

The Table 22 demonstrates where the employment is growing in more specific industry sectors (using NAICS). This allows further analysis of specific employment growth and “basic” industry sectors in the region in 2003.

The Table 22 indicates where the increases occur for the Public Administration sector (State, local, or Federal jobs). Local government is 22% of total employment in 2003 and between 2000-2003 local government jobs increased by 5.6% or 182 employees. State government represents 5% of total employment for Chenango County, and between 2000-2003 the employment increased by 199 employees. Federal government also increased its employment between 2000-2003 by 32 employees, a small increase in comparison to local and State governments. Public Administration jobs are important to Chenango County, there is a considerable increase between 2000-2003, it represents 28% of the total employment, and the average 2003 wage for Public Administration is \$30,505.

Between 2000-2003, Finance, Insurance & Real Estate sector increased employment by 353. Credit Intermediation & Related Activity reported an increase of 160 jobs and Insurance Carriers & related Activities reported an increase of 126 jobs. Finance, Insurance & Real Estate represents 8 % of the total employment and the average wage is \$31,553.

Table 22: Growth Industries in Chenango County, 2000 – 2003*

NAICS	Industry	2003 Jobs	2000 - 2003 Job Growth	2000 – 2003 % Job Growth	2003 % of Area Employment	2003 Average Wages	2003 LQ
952	State Government	780	199	34.30%	5.00%	\$41,588	1.72
953	Local Government	3,451	182	5.60%	22.00%	\$27,803	1.72
522	Credit Intermediation & Related Activity	530	160	43.20%	3.40%	\$42,450	1.62
524	Insurance Carriers & Related Activities	562	126	28.90%	3.60%	\$31,942	2
722	Food Services and Drinking Places	691	57	9.00%	4.40%	\$9,087	0.81
485	Transit and Ground Passenger Transport	147	55	41.70%	0.90%	\$17,836	1.29
324	Petroleum & Coal Products Manufacturing	38	38	100.00%	0.20%	\$31,104	2
951	Federal Government	122	32	35.60%	0.80%	\$36,075	0.5
562	Waste Management and Remediation Service	38	25	192.00%	0.20%	\$17,377	1
326	Plastics & Rubber Products Manufacturing	51	17	50.00%	0.30%	\$22,946	1
99	Unclassified	28	16	133.00%	0.20%	\$9,993	0.4
721	Accommodation	88	15	20.50%	0.60%	\$14,448	0.67
425	Electronic Markets and Agents/Brokers	23	13	130.00%	0.10%	\$21,360	0.25
812	Personal and Laundry Services	98	10	11.40%	0.60%	\$13,337	0.55
444	Building Material & Garden Supply Stores	133	9	7.30%	0.80%	\$20,896	1.14
713	Amusement, Gambling & Recreation Ind	84	6	7.70%	0.50%	\$13,750	0.63
519	Other Information Services	16	6	60.00%	0.10%	\$6,427	0.5
531	Real Estate	42	6	16.70%	0.30%	\$28,154	0.17
451	Sporting Goods/Hobby/Book/Music Stores	19	3	18.80%	0.10%	\$11,666	0.2
	Total			16.3%	44.10%	\$22,013	

*Highlighted industries are in sectors that grew in the six county region between 2000 and 2003.

Source: U.S. Bureau of Labor Statistics, 2000 – 2003.

Introduction to Shift Share Analysis

This section contains a shift-share analysis of Chenango County’s local economy. The analysis attempts to compare the County’s 2000-2003 economic performance to the State’s performance. Below is a brief explanation of shift-share analysis and how it is to be interpreted.

Shift-share analysis measures a given area's local economic base and the competitiveness of its industrial sectors. The technique assumes that employment growth is explained by the combined effect of three main economic influences: State, industrial, and local growth trends. The technique further assumes that, by separating out State and local influences on a given geographic area, it is possible to isolate, and thus measure, a community's local industrial growth. Using employment numbers as its proxy for economic growth, the technique is regarded by many economists and economic development professionals as a useful tool for understanding how local industries are performing relative to a larger base of reference, such as the State or Nation, over a prescribed period of time. It is particularly useful for identifying industries that may have future growth opportunities.

Shift-share analysis divides total employment of each sector or industry into the following mutually exclusive factors:

- State (or National) Growth Share component – indicates employment change that would have occurred if the County's employment growth rate equaled the State's (or Nation's) during the prescribed time period.
- Industrial Mix (IM) component – Indicates how many jobs would have been gained or lost if the County's industrial growth trends mirrored the State's during the prescribed time period.
- Competitive (Local) Share component – indicates whether or not the County's industries performed better or worse than the State's. In addition, the value indicates whether or not the sector/industry is locally competitive (denoted by a positive or negative local share).

Each of the three components is interpreted differently. The following section contains explanations on how each calculation was produced, and how to interpret each numeric value. Following the methodology description are a series of shift-share analyses for each of Chenango County's industrial sectors.

It should be noted that the industrial sector shift share analyses contained within this section provide a "snapshot" in time with respect to countywide industrial performance. It does not represent an historical account of countywide industrial performance. In this case, the snapshot reflects a comparison of 2000 and 2003 annual averages in employment.

State Growth Share Component

$(\text{Local Base Employment in Industry Y}) \times (\text{State's Total Employment Growth Rate}) = \text{Number of Jobs}$

Interpretation: The job growth or decline attributable to State economic growth. This value helps determine the degree of statewide economic influence over local industrial employment change.

Industrial Mix Component

$(\text{Local Base Employment in Industry Y}) \times (\text{Industry Y State Growth Rate} - \text{State's Total Employment Growth Rate}) = \text{Number of Jobs}$

Interpretation: The job growth or decline attributable to the County's industry mix and the growth or decline of the industry statewide. This component helps determine if the County's local industry is weighted towards industries that are growing faster or growing slower than the State average. The calculated value reflects the degree to which the County has industries that are fast or slow growing (denoted by a positive or negative sign).

Competitive (Local) Share Component

$(\text{Local Base Employment in Industry Y}) \times (\text{Industry Y Local Growth Rate} - \text{Industry Y State Growth Rate}) = \text{Number of Jobs}$

Interpretation: The job growth or decline attributable to local comparative advantage such as linked industries, natural resources, local raw materials, local wage rates, etc. In other words, the share of local job growth or decline that results from factors unique to the local area. This value helps determine how much of the employment growth or decline was due to the local economy and gives an idea of how well certain sectors and industries in Chenango County performed compared to the State.

Net Shift

The Net Shift (the actual change in employment between the prescribed time period) represents actual employment in the end year. It is calculated using each of the three shift-share components. The three numeric values are a decomposition of total employment growth for local industries that generally account for state, industrial, and local economic influence.

Qualitative Interpretation

Net Shift = State Growth Share component + Industrial Mix component +
Competitive (Local) Share component

OR

Actual Change in Employment= Job growth that might have resulted from Statewide economic influence
+ Job growth that might have occurred if Industry X were growing at the State rate + Local job growth
that occurred from local area comparative advantage.

Limitations of Shift-Share Analysis

Shift-share analysis is only a simple, descriptive analytical technique, and does not attempt to account for all economic factors that might impact employment growth. It does not comprehensively account for business cycles and actual comparative advantages, among many other business phenomena. For this reason, shift-share analysis is routinely used in conjunction with other analytical methods and tools in order to capture a more accurate representation of a community's industrial environment and economic potential.

Shift-Share Analysis Findings

The following lists indicate the top performing industrial sectors and the top lagging industrial sectors in Chenango County. These lists were compiled using the competitive (local) share data and corresponding LQ and wage rate data. The lists reflect the most competitive sectors and least competitive sectors in Chenango County. Each is listed in descending order.

Top Local Employment Growth Industrial Sectors in Chenango County (2000 – 2003)

- Public Administration;
- Finance, Insurance & Real Estate;
- Transportation & Warehousing; and
- Wholesale Trade.

Most Lagging Industrial Sectors in Chenango County (2000 – 2003)

- Services;
- Construction;
- Retail Trade;
- Manufacturing;
- Agriculture, Forestry, Fishing & Hunting; and
- Mining (except oil & gas).

Table 23: All Industrial Sectors in Chenango County, 2000 – 2003

NAICS Sector	State Growth Share	Industrial Mix	Competitive (Local) Share	Total Change
Agriculture, Forestry, Fishing, and Hunting	-2	2	-12	-12
Construction	-19	2	-197	-214
FIRE	-27	-35	339	277
Manufacturing	-120	-608	-40	-768
Mining (except oil & gas)	-1	1	-12	-12
Services	-127	97	-212	-242
Retail Trade	-59	4	-61	-116
Transportation and Warehousing	-9	-17	36	10
Wholesale Trade	-8	-13	6	-15
Public Administration	-118	185	347	414
Unclassified	0	21	-5	16

Data Source: U.S. Bureau of Labor Statistics, 2000, 2003

Bold sectors indicate those that have positive competitive local shift share components.

Conclusion

The LQ and shift-share analysis is used to identify employment trends in the local economy. The LQ and shift-share analysis indicates that the Public Administration industry performs well in Chenango County when compared to the rest of the State. Many of the State jobs are likely associated with the fact that there is so much State-owned land in the County. These economic analyses, as well as the research conducted on Chenango County's historical economic development trends, belie the importance of the Agriculture, Manufacturing, and Services industries to the County's economic well-being. Current trends depicting potential decreases in the local competitive share of these sectors indicates a need to further examine these industries to identify how they can be strengthened. The following section, Economic Profile, more closely examines the past, present, and potential future conditions of Agriculture, Manufacturing, and Services (Tourism and Health Care) industries.

V. Economic Profile

Introduction

This section includes a detailed discussion of major industrial components of Chenango County' local economy. Major components studies and described herein include Agriculture, Tourism and Services, and Manufacturing. The LQ analysis in section IV, Economic Industry Analysis Summary and the shift share analysis in section IV and Appendix A draw attention to the importance of these industries in Chenango County.

Current Employers

Table 24 presents the largest employers in Chenango County. The Raymond Corporation, the largest employer in the County, is a great support to the community, especially its involvement with schools and providing internships. The Raymond Corporation also recruited suppliers to Greene. 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. Map 3, Employment Centers Map identifies organizations with employment over 250 and employment centers throughout the County.

Business Forecast

Table 25 presents ESRI BIS 2005 business forecasts for Chenango County in 2005. Projections prepared for each business sector include number and percentage of establishments and employees. According to the ESRI BIS data, the service sector contributes the highest number of jobs to the County's economy, representing approximately 37% of all jobs. The manufacturing sector contributes 19% of County employment, while the retail trade sector represents 14%.

ESRI BIS develops these forecasts using information from InfoUSA. Two caveats should be noted about this data. InfoUSA tracks data using a variety of sources, including telephone directories, court data, public information available from the State, annual reports, newspapers, Security Exchange Commission filings, business registrations, etc. If the accounting for an existing business is done elsewhere, such as a regional headquarters, or if an establishment is a franchise, economic data may be reflected in the data for the community housing the headquarters, instead of the local establishment.

Table 24: Largest Employers in Chenango County (Over 50 Employees)

Employer	Location	Product or Service	Employees
The Raymond Corporation	Greene	Materials handling equipment	910
Chenango County Government	Entire Co.	Government services	550
NBT Bank, N.A.	Norwich	Financial services	500
Sherburne-Earlville Schools	Sherburne	Public School district	500
Chenango Memorial Hospital	Norwich	Hospital/long term care	470
Norwich City Schools	Norwich	Public school district	400
Unison Industries	Norwich	Aircraft engine accessories	387
DCMO BOCES	Norwich	Technical/cooperative education	350
New York State Veterans' Home	Oxford	Long term care nursing home	300
Procter & Gamble	Norwich	R&D pharmaceuticals	300
Citizens/Frontier Communications	Norwich	Telephone services	290
Preferred Mutual Insurance	New Berlin	Property and casualty insurance	265
OSG Norwich Pharmaceuticals	Norwich	Contract packager	250
Valley Ridge CIT	Norwich	Developmental disability center	240
Greene Central Schools	Greene	Public school district	225
Unadilla Valley Central School	New Berlin	Public school district	225
Oxford Academy Central School	Oxford	Public school district	215
Bainbridge Guilford Schools	Bainbridge	Public school district	198
Webb & Sons, Inc. (Lok-N-Logs)	Sherburne	Wholesale/retail lumber	194
Snyder Communications	Norwich	Newspaper print media	161
IVCI	Afton	Telephone contractors	160
Wal-mart	Norwich	Department store	156
Afton Central Schools	Afton	Public School district	150
Opportunities for Chenango, Inc.	Norwich	Community support organization	140
Chase Memorial Nursing Home	New Berlin	Long term care nursing home	130
Kerry Bio-Science	Norwich	Pharmaceutical/food ingredients	121
CWS (Community Workshop)	Norwich	Contract packaging	120
Doris L. Patrick Retirement Facility	Norwich	Retirement campus	115
Price Chopper Supermarkets	Norwich	Supermarket	115
Norwich Aero Products	Norwich	Temperature sensors	112
Golden Artist Colors	New Berlin	Artist paint manufacturer	105
The Mang Group	Norwich	Insurance and financial services	105
Otselic Valley Central Schools	South Otselic	Public school district	103

Note: Number of employees includes full time, part-time, and temporary or seasonal employment.

Source: Chenango County Chamber of Commerce

Table 25: Business Forecast*

Industry	Total for County Number		Total for County %	
	Businesses	Employees	Businesses	Employees
Agriculture & Mining	60	170	3.00%	1.00%
Construction	163	430	8.10%	2.50%
Manufacturing	87	3,318	4.30%	19.30%
Transportation	57	303	2.80%	1.80%
Communication	18	78	0.90%	0.50%
Electric, Gas, Water, Sanitary Services	7	27	0.30%	0.20%
Wholesale Trade	86	430	4.30%	2.50%
Retail Trade Summary	446	2,378	22.10%	13.80%
Home Improvement	34	196	1.70%	1.10%
General Merchandise Stores	16	103	0.80%	0.60%
Food Stores	64	579	3.20%	3.40%
Auto Dealers/Aftermarket, Gas	58	260	2.90%	1.50%
Apparel & Accessory Store	13	27	0.60%	0.20%
Furniture & Home Furnishings	48	142	2.40%	0.80%
Eating & Drinking Places	84	593	4.20%	3.40%
Miscellaneous Retail	129	478	6.40%	2.80%
Finance, Insurance, Real Estate	107	1,094	5.30%	6.40%
Banks, Savings, Lending	22	118	1.10%	0.70%
Securities Brokers	7	20	0.30%	0.10%
Insurance Carriers & Agents	28	522	1.40%	3.00%
Real Estate, Holding, Other	50	434	2.50%	2.50%
Services Summary	750	6,344	37.10%	36.90%
Hotels & Lodging	26	59	1.30%	0.30%
Automotive Services	75	190	3.70%	1.10%
Motion Pictures & Amusements	45	170	2.20%	1.00%
Health Services	87	1,500	4.30%	8.70%
Legal Services	36	112	1.80%	0.70%
Education & Libraries	47	2,388	2.30%	13.90%
Other Services	434	1,925	21.50%	11.20%
Government	216	2,541	10.70%	14.80%
Other	23	81	1.10%	0.50%
Total	2,200	17,194	100.00%	100.00%

*Highlights denote smallest components of the local economy
Source: ESRI Business Information Solutions, with data from InfoUSA

Agriculture

Historically, farming has been a profitable business, despite the occasional inclement weather and other challenges. The introduction of supermarkets and national and global competition began to alter the agricultural landscape in the 1960s and 1970s. Increased competition has resulted in very tight profit margins, often with profits not making it to the farmer level. Technical assistance programs provided by the federal and State governments through agencies such as Cornell Cooperative Extension are often focused on environmental issues, not on increasing farming revenues. A major boom to the agricultural industry would be the recognition that farming is an economic development generator, as any other industry, and should thus be supported.

As with many Upstate New York counties that continue to have agriculture as a major element of the County's economy, the survival and strength of the local farming industry is very important. Chenango County's farmers contribute substantially towards the local economy, as agriculture's economic multiplier is often higher than other local 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. In addition, agricultural uses generally do not demand a large amount of services and at the same time provide other benefits such as employment.

Agricultural economic development is similar to general economic development in that it is not an event, but rather a process. It needs continual nourishing, "fertilizing", and support. Advancing towards a stronger agricultural economy requires access to capital, development of value-added items, product expansion and diversification, and direct marketing.



Agriculture Summit 2005

Access to capital is a primary problem confronting most farmers, as inability to invest in upgrades hinders the ability to improve profit margins. Recognizing that farms are small businesses and that agriculture is an industry that must and should be supported, financial resources should be made available to local farmers via business assistance programs.

Although cooperation among the members of the local agricultural community has not been fully realized, there have been some efforts toward coordination in Chenango County. In 1998, consultants Yellow Woods Associates (YWA) worked with the Agricultural 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 include activities to develop new products, services, marketing strategies, and in some cases revised management techniques.

To promote diversification, agriculture is often used to foster other industries, such as the food industry, or tourism. Agricultural tourism is increasingly popular in farming communities near large centers of population, such as Binghamton.

Another growing area is direct marketing of produce to local grocers and restaurants. This can be a time-intensive endeavor, and often is best accomplished by a dedicated individual that works among all the local agriculturalists, and can be a single point of contact for outside buyers. Use and sale of local products can often be advertised with great benefit by the outside buyers, whether local grocers, or chefs and/or restaurants. Having local businesses use locally produced foods can be a powerful marketing tool. As a bonus, such direct contact with outside re-sellers is the information that comes back to the farmer, whether in regards to existing products, or ideas for new items. Cutting out the distributor, whether in this form of marketing, or even through aggressive attendance at farmers' markets can offer substantial 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, NYS 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.

1998 Chenango County Feasibility Study of Value-Added Uses for Milk

Yellow Woods Associates (YWA) worked with the Agricultural Development Council of Chenango County, New York to assess the feasibility of establishing a milk-based, value-added manufacturing enterprise to support the local dairy industry. Phase 1 of the research identified all possible uses for bovine and alternative dairy animal milk in food and beverages, pharmaceuticals, nutraceuticals, cosmetics, and nonfood industrial applications. Phase 1 also provided in-depth analyses of several product lines compliant with local human and natural resources, market structure and barriers, capital requirements, potential profitability, and availability of learning resources.

Phase 2 explored alternative approaches to assembly, production, and marketing of specialty cheeses, fluid beverages, and organic dairy products. Through Phase 2, the regulatory framework for a value-adding dairy enterprise was defined and potential organizational models were reviewed.

2005 Agriculture Summit IV

In November 2005, Chenango County's Cornell Cooperative Extension sponsored the 4th annual Agriculture Summit. As agriculture is an important contributor to the local economy, identifying current trends and concerns related to its continuing viability is paramount to this Economic Development Plan.

New York State, a national leader in many agricultural products, is ranked third in the nation for dairy production, Chenango County's leading agricultural product. Other crops that place the State among the top three producers nationally include apples, grapes, cherries, cabbage, sweet corn, snap beans, beans for processing, and maple syrup.

New York's continuing loss of farmland is the biggest problem currently confronting the State's agricultural industry. Escalating fuel costs are a growing concern as the average price of a hundredweight of fuel rose from 23 cents in 2004 to 56 cents in 2005. Given that most dairy farms' profits are already thin, drastic swings in production costs can often be devastating and burdensome to the farmer. To help alleviate this problem, more farmers have been looking to alternative fuels. Switch grass, historically a problematic weed that farmers have sought to eradicate, is now regarded favorably as showing significant promise as a feedstock for bio fuel, potentially able to run farm equipment.

Developing public relations around the agricultural sector was another idea promoted at the Agriculture Summit, as the point was made that many people are unaware about where their food comes from. Some ideas to facilitate this included holding farm tours and open houses, to not only educate people on the origins of their food, but also on the important role agriculture has played historically at the local, State, and national level. Increased farmer involvement in local government was identified as another means by which the agricultural industry could better position themselves to influence local decision-making.

Developing new markets, marketing techniques, and being able to meet new demand was also discussed. Expanding markets showing great potential include the New York City region's ethnic food markets and specialty cheese throughout the country.

Other problems, such as difficulty in attracting dependable laborers, and the need for more investment capital are factors contributing to the industry's decline. Generational turnover is a considerable concern for farmers in New York State.

Through facilitated workshops, breakout groups discussed agriculture barriers, alternative agriculture ideas, and defined success. Each of these aspects of Chenango County's agricultural industry will be discussed in the following paragraphs.

Financial hardships currently confronting NYS farmers include the price of milk, fuel prices, and lack of capital. Policy hindrances include the lack of support for alternative agriculture, urban development pressure, right to farm issues (specifically a need for zoning to protect agriculture), and too many regulations.

Farmers markets are regarded favorably as a currently underutilized and underdeveloped tool. It was identified that there is a need for more vendors and more variety -- organic products, specifically, are seen as having great potential. Developing financial resources to pay for promotion and advertising (especially to compete with supermarkets) is viewed as critical. While getting local produce into stores can be a

challenge, Great American was identified as being very pro-active in this regard. Developing a brand, e.g., “Made in Chenango County,” especially for the County’s maple syrup was suggested.

A number of measures to increase local awareness of locally grown agricultural products were discussed. Local media outlets (such as radio advertising and remote broadcasts) were identified as potential resources for advertisements, Public Service Announcements, and features covering local agriculture topics. Agritourism was mentioned as another possibility. Finally, incorporating agricultural education into New York State public school curriculum was suggested as a way to ensure children are aware of where their food comes from. Existing resources identified include the Chenango County Farm Bureau “Agriculture in the Classroom” program and Cornell Cooperative Extension’s “Guide to Locally Grown Products” that includes information on 59 Chenango County agricultural producers.

Workshop participants indicated a need for new infrastructure in the County. One facility identified as desirable would be a slaughterhouse, particularly in the Sherburne, North Norwich, and Smyrna area, which houses an estimated 4,000 cows. Currently, the closest small slaughterhouse is in Bridgewater in southern Oneida County. However, there is a very high cost associated with developing a new plant, as it would need to meet the stringent safety standards of the U.S. Department of Agriculture and NYS Department of Agriculture and Markets. In many instances, the costs associated with these requirements have been identified as prohibitive. Consolidation freezers, distribution coolers, and a methane digester were also identified as providing potential opportunities for the County.

Agriculture Demographics

Chenango County is ranked 10th in New York State for dairy. Their primary forages grown are corn silage and hay/haylage. Agriculture is one of the most dominant industries and land uses in Chenango County. Even with a decline of 18% from 1987,¹⁵ farmland continued to cover 183,312 acres in 1997. The number of farms in Chenango County decreased 14% between 1987 and 1997. In 1997, the County’s agricultural industry generated approximately \$53.1 million in sales, representing a 5% decrease since 1992. Of the total 1997 sales, 93% was from livestock and 7% was from crops.

¹⁵ U.S. Census of Agriculture 1987 and 1997.

Table 26: County Summary Highlights for 1987, 1997, & 1992

	1987	1992	1997	1992-1997 % Change	1987-1997 % Change
Number of Farms	933	796	801	0.60%	-14.10%
Land in farms (acres)	223,893	188,008	183,312	-2.50%	-18.10%
Average size of farm (acres)	240	236	229	-3.00%	-4.60%
Median size of farm (acres)	(N)	(N)	160	(N)	(N)
Total cropland (farms)	894	754	743	-1.50%	-16.90%
Total cropland (acres)	115,837	106,697	104,034	-2.50%	-10.20%
Market value of ag. products sold (\$1,000)	55,322	55,912	53,154	-4.90%	-3.90%
Average market value per farm, of ag products sold (dollars)	59,295	70,241	66,359	-5.50%	11.90%
Market value of ag prod sold: crops, incl nursery, and greenhouse crops (\$1,000)	2,472	3,043	3,876	27.40%	56.80%
Market value of ag products sold: livestock, poultry, and their products (\$1,000)	52,849	52,869	49,278	-6.80%	-6.80%
Total farm production expenses@1 (\$1,000)	43,879	42,936	43,085	0.30%	-1.80%
Total farm production expenses@1, average per farm (dollars)	47,030	53,939	53,722	-0.40%	14.20%

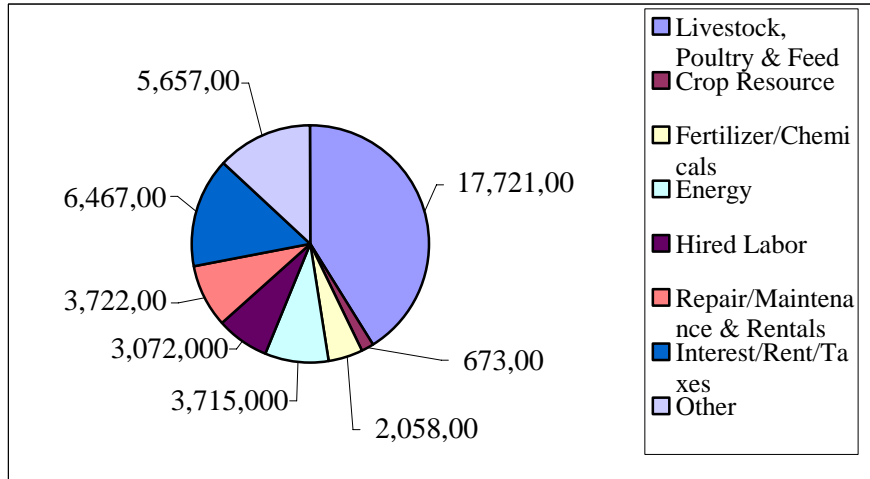
Source: Census of Agriculture, 1987 – 1997

*N is not available

Income Generation

Farm operators typically buy supplies within the local region, which increases the income value of each agricultural sales dollar. In Chenango County, farming production costs totaled over \$43 million in 1997. The following chart breaks down agricultural production costs by type. Livestock, Poultry, and Feed accounts for 41% of total agriculture production costs, followed by Interest, Rent, and Taxes at 15%. Energy costs (including petroleum products, gasoline, and diesel fuel), account for 9% of total agriculture production costs, Energy costs are expected to increase due to increases in gasoline and diesel fuel prices.

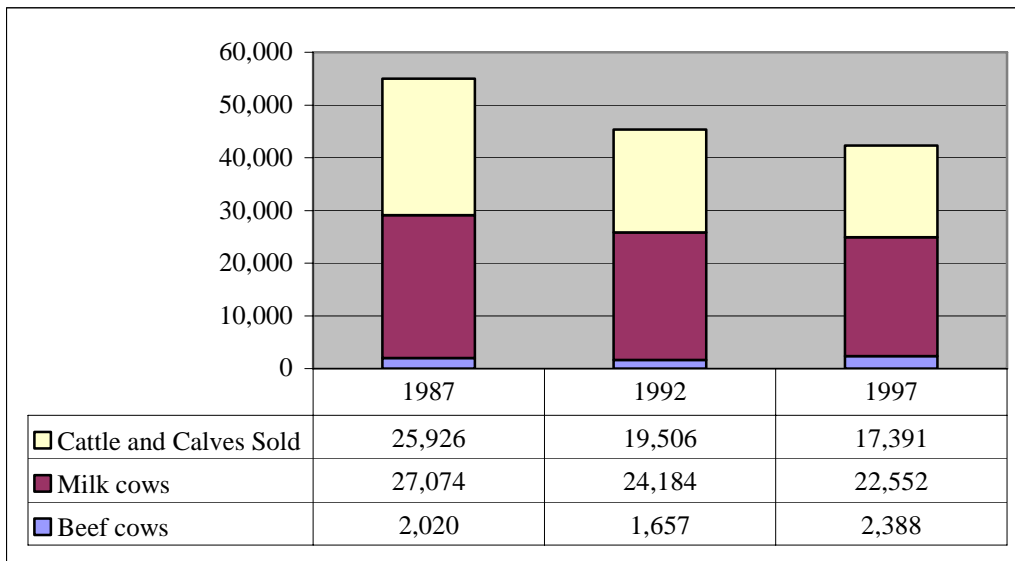
Chart 2: Total Agriculture Production Costs, 1997



Source: Census of Agriculture, 1997

In 1997, 42,331 cattle and calves were sold making it the top livestock sale item in Chenango County. In 1997, 54% of the cattle raised in Chenango County were used for dairy products, 41% were raised and sold, and 4% were raised as beef cows. The total number of cattle and calves in Chenango County dropped by 21% between 1987 and 1997, coupled with a 33% decline in the number of cattle and calves sold and the number of milk cows. The one bright spot has been the beef industry, with the number of beef cows increasing by over 18% during the period.

Graph 7: Cattle and Calves Inventory



Source: Census of Agriculture, 1997

In 1997, Chenango County's top crop item was forage (hay and haylage, grass silage and greenchop produced for livestock feed). In the same year, forage was grown on more than 64,000 acres of farmland

and over half of all crop production. Corn ranks second and is mainly produced for silage (which is silo-fermented forage). In addition, a large majority of corn is produced for grain or seed.

Table 27: Top Crop Production (acres)

Crop Production	1987	1992	1997	1992-1997 % Change	1987-1997 % Change
Hay and Haylage, Grass Silage, and Greenchop	65,089	58,828	64,590	9.80%	-0.80%
Corn for Silage or Green Chop	15,211	14,979	14,942	-0.20%	-1.80%
Corn for Grain or Seed	7,243	5,309	4,632	-12.80%	-36.00%

Source: Census of Agriculture, 1987-1997

Farm Employment

According to the U.S. Census of Agriculture, farm employment in Chenango County decreased between 1992 and 1997; in 1997, 722 farm workers were employed, representing a 4% decline from the 1992 figure of 751.¹⁶ Total payroll decreased by 8 % within the same period. However, despite this decrease, the average amount each farm paid out for labor increased by nearly 14%, while the number of farms hiring farmhands decreased by about 19%.

Table 28: Chenango County Total Hired Farm Labor¹⁷

Employment/Payroll	1992	1997	1992 - 1997 % Change
Hired Farm Labor	751	722	-4.00%
Total Payroll (\$1,000s)	\$3,100	\$2,864	-7.60%
Number of Farms Hiring	279	227	-18.60%
Average Payroll per Farm	\$11,111	\$12,617	13.60%

Source: Census of Agriculture, 1992, 1997

All agricultural industries in Chenango County (animal production, crop production, etc.) declined in employment during the study period. In addition, although the number of farms remained relatively stable between 1992 and 1997, the total market value of agricultural products sold by Chenango County farms declined by about 5% (from \$55.9 million in 1992 to \$53.1 million in 1997).

According to the Chenango County's Cornell Cooperative Extension, it is estimated that full-time employment involved with agricultural production in Chenango County to be near 760 jobs (owners and employees). Approximately 590 people derive some income from part-time farming and another 224 jobs are associated with agriculture through service and support businesses.¹⁸

¹⁶ Due to classification changes, comparable data for 1987 is not available.

¹⁷ It should be noted that, due to the difference between the ES-202 and Census of Agriculture data collection methods, the employment totals in Table 27 differ considerably from those in Graph 7 and Table 28. The ES-202 program obtains its employment estimate by documenting employer-paid unemployment insurance contributions. However, due to the seasonality of agriculture, farmers typically do not pay unemployment insurance for their employees. Consequently, the ES-202 data typically undercounts agricultural employment. As the data is compiled through the use of farmer surveys, the Census of Agriculture totals more accurately reflect actual employment.

¹⁸ Stakeholder interview with Cornell Cooperative Extension, December 2005.

Regional Comparison

A breakdown of agriculture contributions in the six county region is provided in Table 29. The estimated average market value of farms in Chenango County is \$243,494, indicating a higher value than three neighboring counties. Chenango County surpasses every county in number of farms, but the average Chenango County farm is smaller than each of the comparison counties except for the highly developed Broome County. Chenango County ranks second in total market value of products following Cortland County. In 1997, Chenango County comprised 19.8% of the of the six county region's farms, 19% of the region's farm acres, and 19.6% of the region's total market value of products.

Table 29: Six County Agricultural Contribution, 1997

	Chenango County	Broome County	Cortland County
Number of Farms	801	511	452
Acres in Farms	183,312	85,804	120,838
Average Farm Size (acres)	229	168	267
Total Market Value of Products (millions)	\$53.10	\$19.30	\$37.40
Estimated market value of farm (average)	\$243,494	\$154,623	\$270,354

Source: Census of Agriculture, 1987-1997

Summary

All of the above data reveal that agriculture has been declining as a segment of Chenango County's local and regional economy. Although the number of farms and acreage in farms in the County remains relatively stable, the high rate of decline in employment as well as the decline in the market value of agricultural products sold in the County suggest the sector will continue to reduce in presence.¹⁹

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%.

Closures and Downsizing Trends

In recent years, trends in manufacturing, such as relocating production overseas and corporate mergers and downsizing, have greatly impacted the County's manufacturing firms. Beginning with the late 1980s and through the 1990s, a number of plants closed or effected lay-offs. Although the County has a diverse mix of manufacturers in place, downsizing appears to have been dispersed across the industrial sectors.

- 1988 - Sherwood Medical relocated to Mexico (600 jobs lost)

¹⁹ Total market value of agricultural products sold in 2002 totaled \$52,282,000, a two % decrease from 1997. That translates to a \$2.3 million loss in income generated by agriculture in Chenango County.

-
- 1991 - Norwich Shoe Company closed (300 jobs lost)
 - 1992 - Procter & Gamble underwent a corporate restructuring (100 jobs, including 40 management positions lost)
 - 1992/93 - Simmonds Precision layoff (200 jobs lost)
 - 1992 - Victory Markets closed (500 jobs lost)
 - 1992 - Tracy Bakery closed (45 jobs lost)
 - 2003-04 - Champion (100 jobs lost)

More recently, a Kraft plant in New Berlin closed, announcing its decision to consolidate its manufacturing at another facility in 2004, and then laying off 67 employees in 2005. However, there are already plans in place for new manufacturing activities to pick up at the facility.

Recent Development and Expansion Trends

Agro Farma, Inc., a yogurt manufacturer, purchased the former Kraft facility in New Berlin. The facility, which will manufacture Greek specialty yogurt, is scheduled to begin production early in 2006, creating 60 jobs over the next three years.

Raymond Corporation, the County's largest manufacturing employer, has manufactured forklifts at its Village of Greene location for the past 60 years. While the firm experienced a decline in the 1990s, falling to 700+ employees at one point, they now employ 910 employees in Chenango County. The presence of Raymond Corporation has resulted in added benefits (and employment) as the firm has attracted other businesses, including Salami Hydraulics, one of its suppliers, to Chenango County.

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. These firms offer machine shop and fabrication services to non-local markets. Many of these companies, and other more specialized firms, have capabilities in various aerospace-related fields.

Golden Artist Colors, Inc., a Columbus-based company, uses domestic resins to manufacture gel acrylic artist paint. The firm, with international customers located in 59 countries, employs 140. The company recently expanded its facility to allow for 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 links and highlights 9



Golden Artist Colors, Inc.

“unique, independent art supply stores.”

Introduced in 1947, Elmer's Glue, which markets 200 products from school glues, craft products, home repair and woodworker's adhesives, as well as specialty children's products such as watercolors, finger paints, tempera paint, glitter glue and washable paint has a facility on Country Route 38 in Bainbridge. This facility has been downsized over time and currently employs only 10. The firm is also interested in leasing out space in their facility as they currently have over-capacity.

Unison Industries of Norwich, acquired by GE Engine Services, Inc. in April 2002, employs just over 300 workers in their 160,000 square foot facility. The firm, which was founded in 1980, designs and manufactures electrical and mechanical components, sensors, and systems for aircraft, industrial, marine, and space applications. Engine parts built by the company are placed on European and American aircrafts (such as Boeing 787s). The firm's website career link connects to a GE career search engine, which identified a total of eight vacancies posted for Norwich since early November 2005. The facility is located within the Norwich Empire Zone.

According to the firm's website,²⁰ Norwich Aero opened its doors in 1983 with a rented 5,000 square foot building that housed the entire company. Today the firm is housed in a 57,000 square foot manufacturing facility. The extra space has provided the company with ample room to produce quality products in a quick turn around time, resulting in ongoing expansion. Norwich Aero maintains an AS9100 certified quality system recognized by leading aerospace companies (Boeing, UTC Group, Lockheed Martin, Rolls Royce Corporation) as well as the government. The firm indicates on its website that it provides training for job-related skills as well as personal development opportunities. As of the end of September 2005, there were two job vacancies posted at the firm: one for a quality control tester and one for a machinist. The facility is located within the Norwich Empire Zone.

Procter & Gamble Pharmaceuticals, previously known as Norwich Eaton Pharmaceuticals, has been located in Chenango County for many years. Despite recent downsizings, the firm still employs more than 200 workers at its Chenango County facility. The corporate department activities include product development, quality assurance, and product supply/market support. The Norwich facility is responsible for chemical development, pharmaceuticals, dose form process development, analytical and bioanalytical measurement as well as clinical supplies manufacturing and support for other Procter & Gamble sites. About 14 new positions were created at the facility, which is located within the Norwich Empire Zone, in 2004.

OSG Norwich Pharmaceuticals, Inc. based in Norwich, 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 to commercial launch. Founded more than 100 years ago, the firm's capabilities include production, packaging, and distribution of solid dose, semi-solid, and liquid over-the-counter and prescription pharmaceutical products²¹. In 2005, the U.S. Drug Administration

²⁰ Norwich Aero. Profile. Norwich Aero. www.norwichaero.com

²¹ Chenango County Chamber of Commerce website. www.chenangony.org

approved an over-the-counter female contraceptive (the Today Sponge) that may result in 20-50 new jobs at the Norwich facility.

Agroforestry and Wood Manufacturing

The 1996 Chenango County Economic Development Strategy & Action Plan examined the role the wood products industry played in Chenango County employment. This industry includes logging, sawmills, and planing mills, hardwood flooring, millwork, wood pallets and skids, prefab wood buildings, wood preserving, and partitions and fixtures. This section provides some current information on this industry and its subsectors.

Agroforestry

The Cornell Cooperative Extension of Chenango County works closely with local producers on agroforestry, which is defined by Webster’s Dictionary as “system of land use in which harvestable trees or shrubs are grown among or around crops or on pastureland, as a means of preserving or enhancing the productivity of the land.” Agroforestry combines agriculture and forestry technologies to create more integrated, diverse, productive, profitable, healthy and sustainable land-use systems.²² Regarded as a “social forestry,” its purpose is sustainable development, with practices focused on meeting the economic, environmental and social needs of people on their private lands.²³

Agroforestry practices include:

- Alley Cropping
- Forest Farming
- Riparian Forest Buffers
- Silvopasture
- Windbreaks

Much of Chenango County’s agroforestry is based on the production of maple syrup, Christmas trees, ginseng products (and other herbs), and wood ornaments.

Table 30: Chenango County Maple Syrup Production, 2004

Statistic	Number
Maple producers	45
Number of Taps	2,300
Gallons of syrup	4,867
Average price per gallon	\$30-\$32

Table 31: Chenango County Christmas Tree Production, 2002

Statistic	Number
Number of Tree Farms	51
Number of Trees	30,800

Source (Table 30 and 31): Cornell Cooperative Extension of Chenango County

²² National Agroforestry Center. What is Agroforestry. 2005. National Agroforestry Center. <http://www.unl.edu/nac/>

²³ National Agroforestry Center. What is Agroforestry. 2005. National Agroforestry Center. <http://www.unl.edu/nac/>

One of the County’s largest agroforestry businesses is Baillie Lumber Co. The firm, according to the company website, was founded by James A. Baillie in 1923 as a one-man lumber brokerage firm in Hamburg, New York. The firm expanded into Chenango County in 1975, when the purchase of concentration yard in Smyrna. A sawmill was added to the Smyrna location in 1983. With six locations, the firm ships all over the world, selling mostly to manufacturers, wholesalers, and large retailers (like Home Depot).

The firm’s business model closely includes forest landowners, as much of the lumber they sell originates from timber grown by private landowners. The firm uses a variety of timber harvesting programs, which are adapted according to the goals they are looking to achieve. The firm specializes in selective harvesting techniques where only mature, over mature, over crowded, diseased, dying, and poorly formed trees are removed.



Baillie Lumber Co.

About 146 employees work at the Smyrna site. About 30 workers work at the sawmill, which produces approximately 20,000 board feet lumber²⁴ per day. Another 90 employees work at the site’s kiln drying and production facility with a 1,000,000²⁵ predryer, and 1,600,000²⁶ kiln capacity. This plant produces about 300 truckloads of hardwoods per month.

The firm prides itself on “quality personnel,” with foresters holding degrees in forestry from accredited colleges or universities. The company’s biggest challenge in recent years has been finding qualified employees.

Wood Manufacturing

Several studies completed during the late 1990s provide some illuminating information on Chenango County’s timber sector. A 1995 NYSDEC wood fuel resource assessment concluded that 2.3 million dry tons of wood were available each year from excess growth in the Sherburne – Earlville area. The assessment indicated that there was great potential in Chenango County to develop value-added processing. According to the Cornell Cooperative Extension, approximately 60% of Chenango County is covered by forest--including birch, beech, and northern hard woods--with about 30% of this State-owned. Despite this, the lands are largely fragmented, with much of the forests lacking any official stewardship program. The NYSDEC 480A program provides reduced tax assessments for lands of 50 acres or more, provided owners agree to 10-year management plans. This program is not applicable to many individual property owners in the County as they own wood lots under 50 acres.

²⁴ Baillie Lumber Co. “Facilities: Smyrna, NY” Baillie Lumber Co. www.baillie.com.

²⁵ Baillie Lumber Co. “Facilities: Smyrna, NY” Baillie Lumber Co. www.baillie.com.

²⁶ Baillie Lumber Co. “Facilities: Smyrna, NY” Baillie Lumber Co. www.baillie.com.

In 1996, a study by Yellow Woods Associates completed as part of the 1996 Economic Development Plan, identified that the County had 342,000 acres of world-class hardwoods and high quality softwoods. The County also housed, at that time, 9 primary wood processors (sawmills) and 7 secondary wood processors. Products manufactured in the County included:

- Overhead/garage doors
- Surveyor stakes
- Treated landscape timber
- Dressed lumber
- Outdoor furniture
- Signs
- Custom woodwork
- Custom cabinets
- Architectural millwork
- Custom cases
- Dimension stock
- Custom molding
- Log houses

Today, a major Chenango County wood products manufacturer is LOK-N-LOGS. In business since 1976, the firm is one of the nation's leading manufacturers of precut log home packages. The company credits their success to their ability to keep pace with state of the art systems related to log home manufacturing, construction and treatment processes. The company uses locally grown trees, including red pine, which it sells as pre-fabricated log home kits through its national network of dealers.

Tourism

In today's post-industrial economy, many communities are focusing on tourism as an economic development engine. While industrial development generally calls for communities to compete on terms of a standardized set of criteria (such as workforce skills, transportation networks, and cost-of-living), establishing a tourism center challenges a community to "produce evidence of its own market potential." A successful tourism development approach must be multi-faceted. By enhancing their community's attractions and highlighting their unique qualities, tourism developers market their areas to attract guests; create products to encourage lingering; and develop leisure activities to keep guests busy, all the while infusing dollars into the local economy. In order to be successful, the tourism "product" must appeal to travelers and to people seeking leisure time activities. Map 4, Tourism Map, identifies the diversity of some tourist attractions in Chenango County.

New York State Tourism Trends

New York has been very successful in promoting tourism, as it is, according to the Department of Economic Development, currently the second largest industry in the State, employing more than 750,000 people with total wages exceeding \$13 billion.²⁷ While many tourists visit New York City, upstate New York, characterized by its diverse landscapes, small communities, and significant role in the Nation's history, is becoming increasingly popular, with many visitors coming from the New York metro area. The prevalent types of tourism in upstate New York are: (1) Cultural tourism (including heritage tourism and agri-tourism); (2) Environmental tourism (including eco-tourism and recreational tourism); and (3) Antiquing.

Although the terms are frequently interchanged, and a vacation will often include both types of activities, many tourism professionals distinguish between heritage and cultural tourism. While heritage tourism is place-based, rooted in specifics of a specific area and its native residents, cultural tourism focuses on an area's cultural resources and opportunities, such as museums, exhibits, shows, and festivals, with less of an emphasis on place. For example, a car museum in Norwich, New York is an example of cultural tourism; a car museum in Detroit, Michigan is an example of heritage tourism. Agri-tourism, a type of heritage tourism that is especially popular in upstate New York, is defined as the diversification of farm operations to include services and products designed for visitors. The State's many U-PIK farm stands, wineries, and farmstead bed-and-breakfasts are examples of agri-tourism.

²⁷ Chenango County Council of the Arts. "Chenango County Cultural Plan. Prepared by River Street Planning & Development, LLC. 2004.

Cultural and heritage tourists, in addition to being older on average than other types of tourists, tend to earn and spend more money, stay longer on visits, shop more, and are more likely to stay at a hotel or motel. The major benefit to cultural and heritage tourism is that historic and cultural preservation is integral to effective implementation, so resource stewardship is not only encouraged, but is necessary. One major challenge is ensuring that increased visitation does not degrade the quality of the experience or strain the area's cultural and natural resource infrastructure, some of which are likely to be irreplaceable historic resources.

Environmental tourism focuses on an area's natural resources, with potential sub-areas being eco-tourism and recreational tourism. Eco-tourism promotes conservation, sustainability, low-impact visitor behavior, and education. Examples of eco-tourism activities include bird watching, nature photography, hiking, fishing, picnicking, and camping. Recreational tourism focuses on active outdoor recreational activities such as hunting, skeet-shooting, archery, horseback riding, paintball, skiing, kayaking, canoeing, rock-climbing, and cave exploration.

Antiquing has long been an established past time in upstate New York. Unlike regular retail shopping, a major component of antiquing is the hunt. As part of an antique hunt, collectors may comb the countryside, traveling from store to store, stopping at flea markets, craft and antique fairs, second-hand stores, and even yard sales looking for specific items that they may or may not find. While numerous antique districts have sprung up across the State to accommodate these collectors, a growing number of complimentary retail shops have likewise sprung up along side these antique shops. These include art galleries and frame shops; crafts and specialty retail stores; and restaurants and cafes.

Chenango County Tourism Promotion

Chenango County is part of the Leatherstocking Region of New York State's Tourism Regions. The regional I Love NY tourism promotion agency, the Central Leatherstocking Region, includes Greater Binghamton, Chenango, Cooperstown, Herkimer, Madison, Montgomery, Schoharie, and Utica-Rome. The Leatherstocking Region developed theme-oriented Trip Kits for the area covering activities from sports hall of fames to eating establishments to wineries.

The Chenango County Chamber of Commerce provides information on tourism resources on its website, as well as through its printed promotional materials and brochures. The promotional materials include information on museums and historical interests, recreational events, parks and trails, fishing, antique and gift shops, and accommodations. The Chenango Chamber of Commerce provides links on their website to local community websites as well as contact information.

Chenango County sponsors a tourism website which provides information on area attractions, community websites, historical information, recreation, and lodging information. A number of Towns in Chenango County-- Afton, Bainbridge, Guilford, Greene, McDonough, Norwich, and Oxford-- provide websites with business information and tourism resources. There are several local Chambers of Commerce in Chenango County, including Chenango County, Bainbridge, Sherburne, McDonough, and Greene.

NBT Bank sponsors a tourism promotion website at www.tourismtrail.com. The trail promoted via the website is a 200-mile pass through rural area's of New York State's Leatherstocking Region and the Southern Tier. The website promotes seven major attractions, including the Northeast Classic Car Museum in Norwich, the Corning Museum of Glass, the Rockwell Museum of Western Art, the Museum of the Earth, the National Soccer Hall of Fame, the Baseball Hall of Fame, and Howe Caverns. Links are provided for each of the seven resources and the site has a link for an informational brochure. It is also unclear who maintains the website and there is no information or links related to lodging or dining.

Health Care and Social Assistance

Health Care Services is a growing concern throughout the U.S., especially in areas, such as Chenango County, with an increasing population of those aged 55 years and older. This will continue to be the case as the County's population continues to age. This is a concern for Chenango County because according to the 2000 Census, 25% of the population were over 55.



Chenango Memorial Hospital

Of 106 Health Care and Social Assistance establishments located in Chenango County in 2003, 50% provided Ambulatory Health Care Services, while 35% provided Social Assistance. The 139-bed Chenango Memorial Hospital, the only hospital in the County, is one of the largest employers in the City of Norwich, employing 600 in 2005.

In 2003, there were 15 establishments that were categorized as Nursing and Residential Care Facilities, comprising 14% of all Health Care establishments. These establishments employed 429 or 24% of all Health Care and Social Assistance-related employment in the County.

Table 32: Health Care and Social Assistance Establishments in Chenango County, 2003

NAICS	Industry Code Description	Number of Employees	Total Establishments	Percent of Total Establishments
621	Ambulatory Health Care Services	446	53	50%
622	Hospitals	250-499	1	1%
623	Nursing and Residential Care Facilities	429	15	14%
624	Social Assistance	250-499	37	35%
62----	Health Care and Social Assistance	1756	106	100%

Source: U.S. Census Bureau, 2003 County Business Patterns (for week including March 12, 2003).

Hospitals and Health Centers

Chenango Memorial Hospital is a part of United Health Services regional health care system. Chenango Memorial Hospital is a 139-bed facility and is located in the City of Norwich. The hospital started in 1912 and renovated in 1990. Along with hospital care, Chenango Memorial Hospital is involved with the community including education, community wellness programs, and internship programs.

New York State Department of Health (NYSDOH) and the Dormitory Authority of the State of New York (DASNY) awarded Chenango Memorial Hospital a \$500,000 interest free loan. Governor George E. Pataki announced the financial support loan in June of 2004. The loan is intended to ensure high quality health care and assist with Chenango Memorial Hospital's financial turnaround plan. The financial turnaround plan aims to review and access financial trends and further strengthen Chenango Memorial hospital's to meet health care demands.

Bassett Healthcare is a health care provider serving an eight-county region in Central New York. Bassett Healthcare has four hospitals and 22 health centers. There are two health centers in Chenango County, they are located in the City of Norwich and the Town of Sherburne.

Senior Living Facilities in Chenango County

The three senior living facilities with the most employees are New York State Veteran's Home in Oxford, Chase Memorial Nursing Home, and the Doris L. Retirement home.

One of the largest senior living facility in Chenango County is the New York State Veterans' Home at Oxford with approximately 300 employees. The New York State Veterans' Home is a 242-bed facility situated on a sixty-acre site. Services include medical, nursing, psychosocial, and rehabilitative services for veterans and spouses of veterans.

The Chase Memorial Nursing home is located in the Town of New Berlin with approximately 130 employees. The Chase Memorial Nursing Home is a non-profit and provides assisted and independent living. There are 32 apartments and an 80-bed facility with private and semiprivate rooms. Services

include dietary needs, dental needs, nursing, housekeeping, physician needs, physical therapy, and social workers.

The Doris J. Memorial Nursing Home is located City of Norwich with approximately 115 employees. The Doris L. Patrick Campus is on a 27-acre campus with two separate facilities. The Graceview Manor is a 40-apartment HUD housing facility for low-income seniors. The Pearl and Everett Gilmour Health Care Facility is an 80-bed skilled nursing facility for seniors in need of assistance. The owner of Doris J. Memorial Nursing Home is the United Methodist Homes, which owns multiple senior living facilities throughout the United States.

VI. Retail Market Analysis

In 2002, there were 1,700 retail establishments located within the Southern Tier East Region (Broome, Chenango, Cortland, Delaware, Schoharie, and Tioga Counties) generating more than \$3.8 billion in sales, an annual payroll of \$366 million and employing over 21,000 workers, according to the 2002 Census of Retail Trade. However, the Southern Tier East Region trailed the State in terms of retail sales growth between 1997 and 2002. While the State experienced a 28% increase in retail sales, the Southern Tier East Region grew only by 20%. Most of the retail goods and services available within the region are located in Broome County, which accounts for more than 60% of total retail sales. Chenango County accounted for approximately 10% of the region's total retail sales in 2002 (\$359 million).

Within the six county region, Chenango County ranked fourth in terms of number of retail establishments per capita in 2000. Otsego County ranks first and Madison County ranks last. With a generally localized retail environment, Chenango County retailers consist of specialty stores, antique shops, and other small-scale establishments. There were approximately 190 retail establishments in Chenango County in 2003.

The most significant retail hub is in the City of Norwich, also the largest community in Chenango County. The City contains about 14% of the County's population (7,355 in 2000). Within Norwich along Route 12 (a north-south thoroughfare traversing the City), there are a number of National retailers including Wal-Mart, several health and personal care stores, women's apparel shops, and discount stores, among others. Despite this, according to the 2002 Census of Retail Trade, the total number of retail establishments in Chenango County decreased 4% between 1997 and 2002.

Mirroring State and National trends, much of the County's recent (1997-2002) retail decline occurred in its downtowns, while new retail development emerged in suburban and fringe areas. One area, in particular, that experienced substantial growth is the Route 12 corridor in the Town of Norwich, just south of the City of Norwich. According to the Southern Tier East Region Planning Development Board, a substantial portion of the retail increase is from a series of shopping centers in the Town of Norwich.

For many goods and services having limited available in the County, such as full service restaurants, clothing stores, furniture and building materials, and supply stores, County residents are forced to drive to surrounding counties. The expenditure of consumer dollars outside of the local economy is called retail leakage, which will be discussed in more depth later in this section.

Commuter Patterns

More than 76.6% of Chenango County residents drive alone to work in a car, van or truck, according to the 2000 Census. This percentage is about the same as both New York and the U.S. Approximately 77.8% of New York commuters drove alone to work in 2000, and 75.7% of the Nation's commuters drove alone

to work. However, although the percentage declined from 1990, about 13% of Chenango County commuters carpooled to work in 2000, surpassing both State (10.4%) and National (12.2%) averages.

Table 33: Journey To Work Comparison, 2000*

Means of Transportation	Chenango County		Upstate New York State	United States
	Total	%	%	%
Drove Alone - Car, Truck, or Van	17,046	76.60%	77.80%	75.70%
Carpooled - Car, Truck, or Van	2,906	13.10%	10.40%	12.20%
Public Transportation	147	0.70%	4.00%	4.70%
Walked	1,011	4.50%	4.10%	2.90%
Other Means	128	0.60%	0.70%	1.20%
Worked at Home	1,008	4.50%	3.00%	3.30%
Total	22,246	100.00%	100.00%	100.00%

*Includes upstate New York only
Source: U.S. Census Bureau, 2000

More than 52% of Chenango County commuters take less than 20 minutes to travel to work. When comparing this number to the six county region and New York State, Chenango County ranks fourth, surpassing Madison County (48.1%), and New York State (50.7%). Generally, commuters residing in Broome County take the least amount of time to get to work, while those in Chenango take the longest.

The common travel-to-work threshold is 45 minutes for the majority of commuters in the U.S. While 52% of Chenango County commuters are able to get to work in less than 20 minutes, many County commuters have longer commute times than their counterparts in surrounding counties and upstate New York. In fact, the number of Chenango County commuters traveling 45 minutes or longer increased by 81% between 1990 and 2000. In 2000, more than 15% of Chenango County commuters took 45 minutes or longer to get to work, compared to Broome County (5.7%), Madison County (11.1%), Cortland County (11.6%), Otsego County (12.5%), and upstate New York (12.6%).

Table 34: Travel Time to Work Comparison, 2000

Travel Time	Chenango County		Broome County	Delaware County	Cortland County	Madison County	Otsego County	Upstate New York State*
	Total	%	%	%	%	%	%	%
<10 Minutes	4,958	23.30%	18.40%	27.40%	26.80%	22.20%	23.90%	17.40%
10 - 19 Minutes	6,025	28.40%	44.20%	29.10%	31.50%	25.90%	31.90%	33.30%
20 - 24 Minutes	2,546	12.00%	17.10%	10.60%	10.50%	11.60%	13.10%	15.10%
25 - 34 Minutes	3,251	15.30%	12.20%	14.50%	13.60%	20.30%	15.60%	16.50%
35 - 44 Minutes	1,242	5.80%	2.20%	4.90%	6.00%	8.90%	5.00%	5.10%
45 - 59 Minutes	1,353	6.40%	2.20%	5.20%	6.80%	7.20%	4.50%	5.40%
>60 Minutes	1,863	8.80%	3.70%	8.20%	4.80%	3.90%	6.40%	7.20%
Total	21,238	100.00%	100.00%	100.00%	100.00%	100.00%	100.40%	100.00%
Average Time	26.3		18.9	24	21.1	22.6	22.4	21.7

* Includes upstate New York only
Source: U.S. Census Bureau, 2000

Table 35 shows of the 6 counties, Chenango County as the highest percentage of residents with work commutes longer than 90 minutes. It can be inferred from this data that when compared to surrounding counties, the State and the U.S., commuters in Chenango County must travel farther to find employment.

Table 35: Travel Time to Work Comparison, 2000

Travel Time	Chenango County		Broome County	Delaware County	Cortland County	Madison County	Otsego County	Upstate New York State*
	Total	%	%	%	%	%	%	%
<10 Minutes	4,958	23.30%	18.40%	27.40%	26.80%	22.20%	23.90%	17.40%
10 - 19 Minutes	6,025	28.40%	44.20%	29.10%	31.50%	25.90%	31.90%	33.30%
20 - 24 Minutes	2,546	12.00%	17.10%	10.60%	10.50%	11.60%	13.10%	15.10%
25 - 34 Minutes	3,251	15.30%	12.20%	14.50%	13.60%	20.30%	15.60%	16.50%
35 - 44 Minutes	1,242	5.80%	2.20%	4.90%	6.00%	8.90%	5.00%	5.10%
45 - 59 Minutes	1,353	6.40%	2.20%	5.20%	6.80%	7.20%	4.50%	5.40%
>60 Minutes	1,863	8.80%	3.70%	8.20%	4.80%	3.90%	6.40%	7.20%
Total	21,238	100.00%	100.00%	100.00%	100.00%	100.00%	100.40%	100.00%
Average Time	26.3		18.9	24	21.1	22.6	22.4	21.7

Source: U.S. Census 1990-2000

It is also worth noting that the percentage of residents working inside the County declined between 1990 and 2000 by about 10%, according to the U.S. Census. Furthermore, there was a considerable increase in County residents working outside of the State. These figures coincide with the aforementioned statistics regarding the increase in commute time among Chenango County residents between 1990 and 2000.

Considering these statistics, it can also be inferred that Chenango County residents are increasingly traveling outside of the County and State to find work. This is evidenced by both the increase in number of commuters working outside of the County and State as well as the considerable increase in commute time between 1990 and 2000.

Life Style Segmentation Analysis

Premised on the belief that the spending habits of the lifestyle segments will remain consistent over time, Lifestyle Segmentation reports are used to predict future consumer behavior, preferences, and expenditure patterns. Developing a “geo-demographic cluster system,” an area-specific segmentation analysis, is one method communities can use to identify current customer trends and behaviors. Conducting such an analysis can allow a community to more effectively target economic development and community revitalization efforts, whether the intent is to attract local shoppers or potentially, tourists.

Geo-demographic cluster systems are based on the premise that “birds of a feather tend to flock together.” In other words, households living in socially and economically similar areas share a number of similar views, attitudes, values, and, consequently, buying behaviors. By identifying these clusters, a clearer

understanding of an area's common lifestyle preferences (and prevailing market tendencies) can be gained. For businesses, potential new customers and markets can be identified; for communities, potential retail market needs (and viable commercial development opportunities) can be revealed.

Introduction

A Life Style Segmentation Analysis was conducted to gain a better understanding of Chenango County consumers and determine the potential demand for particular products and activities within the County. The geo-demographic cluster system used for this study was the Community Tapestry Segmentation, developed by ESRI Business Information Solutions, Inc. This system uses more than 60 attributes, including income, source of income, employment, home value, housing type, occupation, education, household composition, age, and other key determinants of consumer behavior to create 65 lifestyle segments.

According to the Community Tapestry Segmentation, Chenango County's residents fall into the following five top segments: Rooted Rural (37.7%); Southern Satellites (15.6%); Midland Crowd (7.7%); Salt of the Earth (7.5%); and Midlife Junction (6.9%). More detailed descriptions of each of the segments follow.

Rooted Rural

This older, predominantly family, market is found in rural areas. The population is older, with a median age of 41, stable, and settled. About a third of the households draw from Social Security. Neighborhoods are mostly single-family homes, with some mobile homes and seasonal housing intermixed. Median home value is \$82,000.

Southern Satellites

One of the more rural segments of the U.S. population, Southern Satellites neighborhoods are rural settlements primarily found in the South. Those residing in these neighborhoods are typically employed in either manufacturing or construction. Families in this market own newer single-family homes or mobile homes, with a median value of \$79,000. This market is older, with a median age of 37 years, and often enjoys fishing and hunting. This cohort also relies heavily upon automobiles.

Midland Crowd

This segment closely mirrors national averages in several characteristics: median age (36 years) and average family size (3.1). Median household income, \$47,000, is just under the U.S. median, \$48,100. These neighborhoods are located primarily in rural areas, growing at annual rate of 2.5%. Almost 40% of the homes were built after 1990, while most (95%) are single family or mobile homes.

Salt of the Earth

This market consists of a population that is predominantly blue-collar and rural or small town dwellers. They generally work in agricultural and mining jobs and are slightly older than the U.S. average with a

median age of approximately 40 years. There is a fairly high percentage of unemployment among this market. The Salt of the Earth segment is generally civically engaged and avid newspaper readers. Most of their time is devoted to local issues and they tend to travel domestically.

Midlife Junction

Empty nesters, most of the population in this group are employed. Many are approaching retirement with about 30% already drawing retirement income. While most continue to own their homes, many have moved into apartment buildings. The housing market is a mix of single-family homes and low-density apartments, somewhere between urban and rural. The residents of Midlife Junction have a median age of 40 years and a median household income of \$42,900.

Retail Sales and Consumer Spending

Many U.S. communities have researched consumer-spending behaviors. In general, consumers prefer to shop for everyday items close to home. These items include goods and services such as groceries, home cleaning supplies, personal care items, alcohol, cigarettes, automobile repair, beauty salon services, and restaurants. In contrast, consumers are willing to travel farther from home for larger ticket items such as furniture, furnishings, appliances, electronics, clothing, entertainment, automobiles, recreational vehicles, medical services, and big-box retail stores. Finally, consumers are willing to take longer day trips from home in search of specialty shopping experiences that may include dining, entertainment, and recreation.

In order to learn about the spending patterns of Chenango County residents, a Retail Goods and Services Expenditure report was obtained from ESRI BIS. The information from this study is included in Table 36. ESRI BIS uses data from the U.S. Bureau of Labor Statistics' (BLS) Consumer Expenditure Surveys to identify a baseline-spending pattern. Data from additional surveys, including a survey for daily purchases and an Interview Survey for general purchases, are used to refine the spending estimates. ESRI BIS integrates data from both surveys to provide a comprehensive database on all consumer expenditures.

Table 36 indicates the spending habits of Chenango County residents as compared to a nationwide standard. The Spending Potential Index (SPI) is household-based, and represents the amount of money spent for a product or service relative to a National average of 100.

One important aspect about the data should be noted. While local spending habits are compared to a National average, the expenditure outlays are not corrected for regional inflation. Therefore, that a given community spends less on specific goods or services may reflect one of several things: (1) local residents are able to obtain the desired goods or services at a cheaper cost; (2) local residents' interests in such goods and services falls short of the National average or the goods and services are not easily available, or (3) local residents have less disposable income to spend on such items. It is impossible to accurately distinguish the extent of influence each factor plays on local expenditure trends.

According to the SPI, Chenango County residents spend considerably less than their National counterparts on most goods and services. Chenango County residents spend far lower than average on Financial Investments (at 37), Fees and Admissions such as movies and sporting events (ranging from 52 - 60), and travel related goods and services (ranging from 58 – 67).

Financial investments in the County are considerably low when compared to the entire U.S. The index value for this financial category was the lowest of all of the indices specified in the report. Fees for Recreational Lessons was the second lowest expenditure ranking in the County.

There is no category of retail goods and services that Chenango County residents spend more on than the U.S. However, two subcategories approach the National average. Listed under Entertainment and Recreation is Recreational Vehicles and Fees, which had an index of 95. These costs are likely associated with snowmobiles, boating or other recreational vehicles, such as all-terrain vehicles (ATVs). The second highest scoring subcategory was Prescription Drugs, listed under Health, which had an index of 94. Residents in similar upstate New York communities typically spend close to or above the National average for these goods and services.

Table 36: Retail Goods and Services Expenditure, 1 of 2 tables

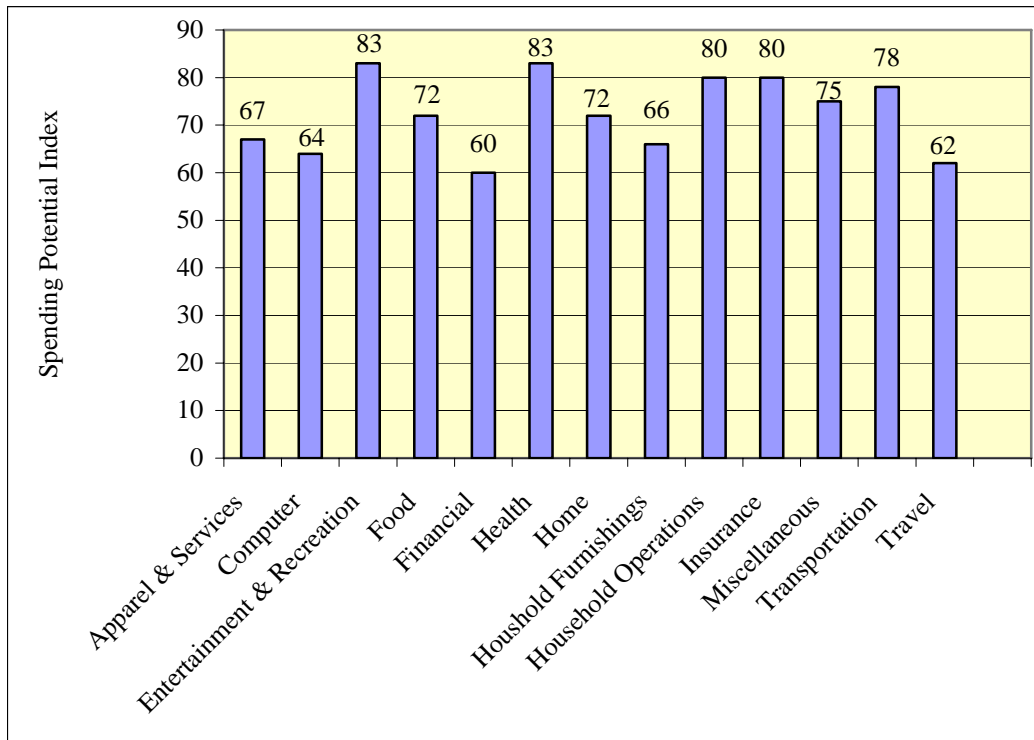
Retail Goods and Services	Spending Potential Index	Average Amount Spent	Total Amount Spent
Apparel and Services	67	\$1,840.10	\$37,197,575
Men's	68	\$355.92	\$7,194,961
Women's	65	\$587.24	\$11,871,007
Children's	71	\$306.83	\$6,202,597
Footwear	66	\$329.83	\$6,667,423
Watches & Jewelry	68	\$171.41	\$3,464,967
Apparel Products and Services	61	\$88.88	\$1,796,620
Computers			
Computer and Hardware for Home Use	63	\$155.12	\$3,135,828
Software and Accessories for Home Use	64	\$18.73	\$378,585
Entertainment and Recreation	71	\$2,220.79	\$44,893,252
Fees and Admissions	56	\$339.56	\$6,864,157
Membership Fees for Clubs	59	\$97.58	\$1,972,511
Fees for Participant Sports, excl. Trips	58	\$66.15	\$1,337,122
Admission to Movie/Theatre/Opera/Ballet	54	\$78.85	\$1,593,877
Admission to Sporting Events, excl. Trips	60	\$33.78	\$682,880
Fees for Recreational Lessons	52	\$63.21	\$1,277,767
TV/Video/Sound Equipment	71	\$732.48	\$14,807,053
Community Antenna or Cable Television	75	\$415.72	\$8,403,762
Color Televisions	64	\$73.33	\$1,482,444
VCRs, Video Camera, and DVD Players	62	\$23.35	\$472,001
Video Cassettes and DVDs	68	\$27.74	\$560,685
Video Game Hardware and Software	64	\$21.67	\$438,116
Satellite Dishes	82	\$2.41	\$48,715
Rental of Video Cassettes and DVDs	65	\$40.69	\$822,471
Sound Equipment	69	\$123.55	\$2,497,490
Rental and Repair of TV/Sound Equipment	66	\$4.03	\$81,369
Pets	82	\$286.73	\$5,796,173
Toys and Games	68	\$139.16	\$2,813,114
Recreational Vehicles and Fees	95	\$319.30	\$6,454,685
Sports/Recreation/Exercise Equipment	73	\$161.51	\$3,264,916
Photo Equipment and Supplies	67	\$96.35	\$1,947,690
Reading	65	\$145.71	\$2,945,464
Food	72	\$5,681.70	\$114,855,578
Food at Home	74	\$3,501.42	\$70,781,224
Bakery and Cereal Products	73	\$518.46	\$10,480,595
Meat, Poultry, Fish and Eggs	75	\$943.23	\$19,067,369
Dairy Products	74	\$383.19	\$7,746,174
Fruits and Vegetables	70	\$587.42	\$11,874,771
Snacks and Other Food at Home	75	\$1,069.12	\$21,612,315
Food Away from Home	69	\$2,180.28	\$44,074,354
Alcoholic Beverages	63	\$321.40	\$6,497,110
Nonalcoholic Beverages at Home	77	\$303.64	\$6,138,003
Financial			
Investments	37	\$3,064.28	\$61,944,417
Vehicle Loans	83	\$4,495.12	\$90,868,947
Health			
Nonprescription Drugs	80	\$79.66	\$1,610,284
Prescription Drugs	94	\$508.48	\$10,278,896
Eyeglasses and Contact Lenses	75	\$63.87	\$1,291,089
...continued			

Retail Goods and Services	Spending Potential Index	Average Amount Spent	Total Amount Spent
Home			
Mortgage Payment and Basics	64	\$5,092.97	\$102,954,466
Maintenance and Remodeling Services	66	\$1,031.86	\$20,859,043
Maintenance and Remodeling Material	80	\$257.75	\$5,210,356
Utilities, Fuel, and Public Services	77	\$3,196.56	\$64,618,507
Household Furnishings and Equipment			
Household Textiles	64	\$80.78	\$1,632,947
Furniture	63	\$380.60	\$7,693,740
Floor Coverings	61	\$48.15	\$973,288
Major Appliances	73	\$199.15	\$4,025,756
House wares	71	\$67.61	\$1,366,681
Small Appliances	71	\$24.90	\$503,424
Luggage	55	\$5.82	\$117,678
Telephones and Accessories	70	\$36.26	\$733,085
Household Operations			
Childcare	82	\$235.21	\$4,754,732
Lawn and Garden	74	\$348.16	\$7,038,026
Moving/Storage/Freight Express	79	\$29.46	\$595,530
Housekeeping Supplies	86	\$500.56	\$10,118,732
Insurance			
Owners and Renters Insurance	82	\$341.83	\$6,910,118
Vehicle Insurance	74	\$969.22	\$19,592,782
Life/Other Insurance	79	\$499.85	\$10,104,548
Health Insurance	86	\$1,438.06	\$29,070,366
Miscellaneous			
Personal Care Products	71	\$288.18	\$5,825,535
School Books and Supplies	66	\$74.91	\$1,514,300
Smoking Products	87	\$428.62	\$8,664,494
Transportation			
Vehicle Purchases (Net Outlay)	81	\$4,519.69	\$91,365,508
Gasoline and Motor Oil	82	\$1,507.46	\$30,473,271
Vehicle Maintenance and Repairs	72	\$747.94	\$15,119,575
Travel			
Airline Fares	58	\$235.33	\$4,757,156
Lodging on Trips	67	\$266.01	\$5,377,324
Auto/Truck/Van Rental on Trips	57	\$28.08	\$567,685
Food and Drink on Trips	67	\$301.64	\$6,097,724

Source: ESRI Business Information Solutions (ESRI BIS). Expenditure Data area derived from the Consumer Expenditure Surveys, Bureau of Labor Statistics. Data was updated in September of 2003 based on Consumer Expenditure Surveys from 1999, 2000,

After calculating the averages of all of the potential spending index values for each category, a graph was developed to illustrate the findings. As indicated in Graph 8, the top three retail goods and services that Chenango residents spend the most on are entertainment and recreation, health, household operations, and insurance. Financial, travel, and computer goods and services are the least demanded retail items by Chenango County residents.

Graph 8: Spending Potential Index (SPI) per Retail Good or Service*



*Represents average spending potential Index
Source: U.S. Census Bureau, 2000

Retail Sales Leakage and Market Capture

The County’s retail market place profile is illustrated on Table 37. The table attempts to compare retail goods sold locally to the demand for retail goods expressed by local residents.

The difference between what local residents buy and what local retailers sell is referred to as “Leakage or Surplus”. A “Leakage” is when residents are buying more than what is sold in the area; therefore, the residents must be traveling outside the area to shop. This indicates a “Leakage” of local dollars outside the area and is indicated by a negative number in Table 37. A “Surplus” is when residents are purchasing less than the amount actually being sold in the area. This indicates that area retailers are attracting shoppers from outside the area, reflected by a positive number in Table 37.

As indicated in Table 37, the only Chenango County retail sectors experiencing surpluses and potentially attracting shoppers from outside Chenango County are the following (listed in descending order):

- Health and Personal Care Stores (>\$27 million);
- Beer, Wine, & Liquor (>1 million);
- Books, Periodical, and Music Stores (> 929,000); and
- Sporting Goods/Hobby/Musical Instrument Stores (>\$189,000).

In reviewing Table 37, it appears there are several under-represented retail sectors in the County, forcing residents to drive outside the County to make many of these purchases. It is worth noting the higher dollar amounts (leakage of \$10 million or more) present in the table. These are listed below in descending order:

- Full Service Restaurants (>\$39 million);
- Gasoline Stations (> 28 million);
- Food Service & Drinking Places (>26 million);
- Motor Vehicle & Parts Dealers (>20 million);
- Automobile Dealers (>13 million);
- Building Materials, Garden Equipment & Supply Stores (>9 million); and
- Clothing & Clothing Accessories Stores (>\$11 million).

The total amount of retail sales leakage in Chenango County is over \$220 million, according to ESRI Business Information Solutions. That translates to a loss of 28% of all retail demand potential in the County. This considerable amount of retail demand dollars are being spent outside the County.

To create this table, ESRI Business Information Solutions uses data from InfoUSA, a sales leads and mailing list company. As InfoUSA uses a variety of data sources, it may not include every establishment located within a community and it may not reflect recent changes. In addition, reliance upon mailing addresses to identify a business location may result in location misidentification.

Table 37: Retail Sales Leakage and Market Capture*

Retail Marketplace Profile	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/ Surplus \$	Leakage/ Surplus Factor
Motor Vehicle & Parts Dealers	\$95,802,374	\$116,503,403	(\$20,701,029)	-9.8
Automobile Dealers	\$80,502,229	\$94,345,995	(\$13,843,766)	-7.9
Other Motor Vehicle Dealers	\$7,302,251	\$10,679,440	(\$3,377,189)	-18.8
Auto Parts, Accessories, and Tire Stores	\$7,997,894	\$11,477,968	(\$3,480,074)	-17.9
Furniture & Home Furnishings Stores	\$4,947,610	\$9,058,850	(\$4,111,240)	-29.4
Furniture Stores	\$2,445,410	\$5,618,151	(\$3,172,741)	-39.3
Home Furnishings Stores	\$2,502,200	\$3,440,699	(\$938,499)	-15.8
Electronics & Appliance Stores	\$4,100,156	\$7,316,967	(\$3,216,811)	-28.2
Bldg Materials, Garden Equip. & Supply Stores	\$10,393,177	\$22,525,778	(\$12,132,601)	-36.9
Building Material and Supplies Dealers	\$9,276,996	\$18,612,245	(\$9,335,249)	-33.5
Lawn and Garden Equipment and Supplies Store	\$1,116,181	\$3,913,533	(\$2,797,352)	-55.6
Food & Beverage Stores	\$72,629,775	\$80,534,377	(\$7,904,602)	-5.2
Grocery Stores	\$64,480,887	\$73,339,898	(\$8,859,011)	-6.4
Specialty Food Stores	\$2,251,243	\$2,691,575	(\$440,332)	-8.9
Beer, Wine, and Liquor Stores	\$5,897,645	\$4,502,904	\$1,394,741	13.4
Health & Personal Care Stores	\$56,237,639	\$28,297,502	\$27,940,137	33.1
Gasoline Stations	\$4,372,841	\$32,722,533	(\$28,349,692)	-76.4
Clothing and Clothing Accessories Stores	\$8,626,541	\$20,254,076	(\$11,627,535)	-40.3
Clothing Stores	\$5,711,847	\$14,724,420	(\$9,012,573)	-44.1
Shoe Stores	\$1,308,873	\$3,402,818	(\$2,093,945)	-44.4
Jewelry, Luggage, and Leather Goods Stores	\$1,605,821	\$2,126,838	(\$521,017)	-14.4
Sporting Goods, Hobby, Book, and Music Store	\$13,160,984	\$12,971,811	\$189,173	0.7
Sporting Goods/Hobby/Musical Instrument Store	\$6,843,624	\$7,583,862	(\$740,238)	-5.1
Books, Periodical, and Music Stores	\$6,317,360	\$5,387,949	\$929,411	7.9
General Merchandise Stores	\$17,641,925	\$26,517,773	(\$8,875,848)	-20.1
Department Stores (Excluding Leased Depts.)	\$3,035,447	\$6,227,770	(\$3,192,323)	-34.5
Other General Merchandise Stores	\$14,606,478	\$20,290,003	(\$5,683,525)	-16.3
Miscellaneous Store Retailers	\$11,184,103	\$15,141,546	(\$3,957,443)	-15
Florists	\$1,262,849	\$1,423,900	(\$161,051)	-6
Office Supplies, Stationery, and Gift Stores	\$2,973,259	\$3,933,090	(\$959,831)	-13.9
Used Merchandise Stores	\$2,845,912	\$4,252,403	(\$1,406,491)	-19.8
Other Miscellaneous Store Retailers	\$4,102,083	\$5,532,153	(\$1,430,070)	-14.8
Nonstore Retailers	\$5,125,402	\$7,793,711	(\$2,668,309)	-20.7
Electronic Shopping and Mail-Order Houses	\$4,624,235	\$6,891,674	(\$2,267,439)	-19.7
Vending Machine Operators	\$501,167	\$902,037	(\$400,870)	-28.6
Direct Selling Establishments	\$0	\$0	\$0	0
Food Services & Drinking Places	\$28,673,601	\$55,528,404	(\$26,854,803)	-31.9
Full-Service Restaurants	\$19,852	\$39,110,563	(\$39,090,711)	-32.7
Limited-Service Eating Places	\$6,644,463	\$12,551,492	(\$5,907,029)	-30.8
Special Food Services	\$1,167,535	\$2,619,238	(\$1,451,703)	-38.3
Drinking Places (Alcoholic Beverages)	\$1,008,853	\$1,247,111	(\$238,258)	-10.6

Source: ESRI Business Information Solutions, with data from InfoUSA.; compiled by Laberge Group.
 Data Note: Supply (retails sales) estimates to consumers by establishments. Sales to businesses are exclude. Demand (retail Potential) represents the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor is a measure of consumer demand relative to supply, economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments sub

VII. Economic Development Tools

Chenango County is fortunate a wide variety of economic development tools available to provide assistance to both existing local businesses as well as new businesses. A myriad of agencies administer these local, regional, State, and federal programs. A summary of the more relevant tools follows.

Local and County Economic Development Tools

Norwich Business Improvement District

The City of Norwich established a Business Improvement District (BID) in 1986, one of the first BIDs in New York State, to help preserve and enhance downtown Norwich. In 1992, the Norwich BID was incorporated as the Norwich Business Improvement District Management Association, Inc. (BIDMA, Inc.). The association's goal is to continually improve downtown Norwich and its offerings. The Norwich BID's mission statement is to encourage economic development in Norwich through business leadership and support community cooperation.

In spring 2003, the Norwich BID kicked off a \$1.4 million dollar streetscape improvement project funded by State and Federal grants. The project encompasses North and South Broad Streets from Mitchell to Front Streets, as well as East and West Main Streets to the end of East and West Parks. The first phase of the project included removal of sidewalk to allow for underground wiring of the existing light poles and installed 31 new pedestrian level walkway lights. The next phase of the streetscape project started in the spring of 2004 to replace sidewalks, improve landscaping, and beautify signs.

In the spring of 2005, the last phase included a paving project for North and South Broad Street from Rexford to Prentice Streets. The phase also included decorative crosswalks and median inlays to increase pedestrian safety. This phase finished construction in the summer of 2005.

The Norwich BID provides multiple activities throughout the year, the activities include holiday events, lunch and music in the park series, and the annual pumpkin festival. In October of 2005, the BID provided three customer service workshops. Attendance of the workshops recorded over 300 participants. In December of 2005, the New York State Main Street DHCR grant awarded the Norwich BID with \$200,000, which will be implemented in 2006.

Chenango County Revolving Loan Fund

Chenango County has a revolving loan fund oriented towards assisting manufacturing firms. This program is administered through the Chenango County Department of Planning and Development. While interest rates are relatively flexible, loan amounts cannot exceed \$75,000 or 50% of a project's cost. Although the fund's primary goals are to create new or retain existing County jobs, additional weight is

given to projects that increase taxable property values, set the foundation for future job growth, provide essential services, and/or leverage the greatest level of private funds.

Each application generates 0.5% loan fee. The loans may be subordinate, and they must be based on guarantees. The County uses a standard of \$10,000 per job in its analysis. Most all uses of capital are allowed, except for re-financing. The application process and the disbursement of funds take about six to eight weeks.

Sherburne Revolving Loan Fund

The Sherburne Revolving Loan Fund is for businesses in the Village of Sherburne and the immediate surrounding areas. The Sherburne Revolving Loan Fund is oriented towards assisting all businesses with job growth, and it is not the primary lender. The interest rate is 75% of prime.

Chenango County Industrial Development Agency

The Chenango County Industrial Development Agency (IDA) is a State of New York public benefit corporation, established to provide incentives to firms expanding or locating in Chenango County. The Chenango County IDA considers potential projects and determines benefits by developing and reviewing an eligibility questionnaire. A brief listing of the resources they offer follows.

Payment in Lieu of Tax

Payment in lieu of tax is an agreement between the IDA and all affected taxing jurisdictions that have an agreement and scheduled payments. The payment plan is based on current tax rates and an agreed value of the project. The exemptions are usually for 10 years; the first year is an exemption of 95%, the next nine years the exemptions decrease annually by 10%, by the eleventh year the project is completely taxable.

Tax Exempt Industrial Development Bond

The tax-exempt industrial development bond (IRB) is only for new construction and equipping for manufacturing facilities. The interest payment to the lender is exempt of Federal and State income tax. The IRB is an income tax savings to the lender and offers a lower annual interest rate than the prevailing market rates for similar projects.

Sale Lease Back Transactions

The sale lease back transaction is an agreement between the project sponsor and the IDA. The features of the sales lease back transaction include a transfer of the title to lands, buildings, equipment, and/or fixtures to the IDA by means of deed and/or bill of sale. The IDA then leases back the lands, buildings, equipment and/or fixtures. The leases are equal to the bond or mortgage payments with an option to purchase the lands, buildings, equipment, and/or fixtures.

New York State Sales and Use Tax Exemption

The New York State sales and tax exemption is used for the cost of construction materials and equipment rentals and non-manufacturing equipment.

Mortgage Recording Tax Exemption

The mortgage recording tax exemption is an exemption at the rate of \$7.50 each \$1000 borrowed from project costs. The repayment is secured through a real estate mortgage.

Incubator Facilities

The Earl B. Clark Industrial Park is available for the construction of incubator facilities. The facility is in the Greater Norwich Empire Zone, and the benefits include below market rate leases and sales tax exemption.

Greater Norwich Empire Zone

Chenango County has a very successful Empire Zone program. In Chenango County, as in other municipalities around the State, Qualified Empire Zone Enterprises (QEZE) are eligible for sales tax exemption, real property, and business tax credits for businesses locating and expanding in Empire Zones. The purpose of the Empire Zones program is to give companies that increase employment the opportunity to operate on an almost "tax-free" basis for up to 10 years in designated areas of New York State, additional savings are available on a declining basis in years 11 through 15. New York State has ordered significant revisions in their existing Empire Zones, requiring new plans to be developed by early 2006. Map 5, the Greater Norwich Empire Zone, reflects the required revisions for 2006

In 2005, the Greater Norwich Empire Zone produced a Development Policy to improve and increase the measurable results, accountability, and efficiency of the organization. Examination from previous plans and consultation from local and State economic development agencies, the Greater Norwich Empire Zone Development Policy identified business sectors. The business sectors include agriculture, wood products, small and medium sized manufacturing facilities, wholesale and distribution, hi-tech, and professional services.

The Greater Norwich Empire Zone Development Policy identifies sites with little economic activity. The following are a list of sites in or around the City and Town of Norwich:

- City of Norwich Downtown Business District;
- Former SUNY Morrisville Building;
- Lt. Warren Eaton Airport Industrial Park;
- Earl B. Clark Industrial Park;
- The Eaton Center;
- North and South Plaza;
- NYS Route 12 & Lower Ravine Road Intersection; and
- Small Manufacturing District.

Empire Zone's Application and Review

The application process takes approximately eight to 12 weeks. The application process includes an orientation meeting, review of application, and a cost-benefit analysis. If accepted, the Zone Coordinator makes a recommendation to the Zone Administrator Board and the Zone Certifying Officer (Officer). Upon approval, the Officer signs and dates the application, then the application sent to the State Department of Labor and the application is reviewed for any outstanding issues. If approved, the Commissioner of Labor signs off on the application and forwards the application to the State Department of Economic Development to issue a Certificate of Eligibility and sends it to the Zone Coordinator. The Officer then signs and dates the certificate and mails it to the appropriate business. The certificate is then forwarded to local utility companies.

The Zone Administrative Board reserves the right to decertify a business in accordance with Section 11.9 of the Empire Zone regulations. The Zone Coordinator performs evaluations with businesses in an Empire Zone. The evaluations take place in year one, year two, and year five. Year one verifies the business is certified with a certificate and review the projections from the application. Year two reviews and verifies the original projections are met. The Zone Coordinator evaluates the business and addresses any outstanding obligations. In year five, the Zone Coordinator evaluates information from year one and two and assesses any additional services that may be needed.

Empire Zone Benefits

- **QEZE Sales Tax Exemptions.** QEZEs are granted a 10-year exemption from State sales tax on purchases of goods and services (including utility services and owned vehicles) used predominantly in such zone (effective March 1, 2001).
- **QEZE Credit for Real Property Taxes.** QEZEs are allowed a refundable credit against their business tax equal to a percentage of real property taxes paid based upon increased employment in the zone (effective for taxable years beginning on or after January 1, 2001).
- **QEZE Tax Reduction Credit.** QEZEs are allowed a credit against their tax equal to a percentage of taxes attributable to the zone enterprise (effective taxable years beginning on or after January 1, 2001).
- **Wage Tax Credit (WTC).** This credit is available for up to five consecutive years for companies hiring full-time employees in newly created jobs. For employees in special targeted groups, this credit equals \$3,000 per year, with a credit of \$1,500 per year effective January 1, 2001, for all other new hires.
- **EZ Investment Tax and Employment Incentives Credit (ITC-EIC).** Businesses that create new jobs and make new investments in production, property and equipment may qualify for tax credits of up to 19% of the company's eligible investment.

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- **New Business Refund.** Businesses new to New York State are entitled to a 50% cash refund of unused Empire Zone-WTC and ITC amounts. Other businesses may carry forward unused credits indefinitely.
 - **Utility Rate Savings.** Special reduced electric and gas rates may be available through investor-owned utilities in New York State. Businesses that locate or expand their operations in an Empire Zones may receive significantly reduced rates.
 - **Zone Capital Credit.** A 25% tax credit against personal or corporate income taxes is available for contributing or purchasing shares in a zone capital corporation; or for a direct equity investment in a certified zone business; or for contributions to approved community development projects within an Empire Zone.
 - **Technical Assistance.** Each local zone office is staffed with professionals qualified to assist businesses locating or expanding in an Empire Zone.

Cornell Cooperative Extension of Chenango County

The Cooperative Extension in Chenango County is a partner in agriculture economic development. They are closely aligned with the Agriculture Development Council, established by the County Board of Legislators in 1996. The Cornell Cooperative Extension of Chenango County supports local agriculture and improves the community's knowledge of current trends in the agriculture industry. It provides workshops, conferences, a newsletter, and supports local organizations to improve the marketing skills. The Cornell Cooperative Extension in Chenango County supports agriculture, agroforestry, natural resources, and horticulture.

Regional Economic Development Tools

The Southern Tier East Regional Planning Development Board

In 1975, the Southern Tier East Regional Planning Development Board (STERPDB) was established by merging two regional planning organizations, the Southern Tier East Regional Planning Board, based in Binghamton and the Southern Tier Regional Planning and Development Board, based in Norwich. STERPDB is the regional planning board for six counties: Broome, Chenango, Cortland, Delaware, Schoharie, and Tioga. STERPDB is part of the Appalachian Region, which includes the six STERPDB counties and Otsego and Tompkins Counties.

There are three committees in STERPDB, which includes finance, criminal justice advisory board, and comprehensive economic development strategy (CEDS). CEDS committee consolidated former boards in response new requirements from the Economic Development Administration (EDA). CEDS advises the regional board on proposed economic plans, coordinate programs, and review the Appalachian Regional Commission projects.

STERPDB created a non-profit organization called the Tier Information and Enterprise Resources Incorporated (TIER). TIER is an organization to promote industrial and economic development throughout the region.

Chenango Delaware, and Otsego Workforce Investment Board

The Chenango-Delaware-Otsego (CDO) Workforce Investment Board is a network of three counties working together to assist with job search, education, and training needs. CDO provides services for businesses, job seekers, education seekers, and youth. The CDO created a one-stop career center for job seekers and businesses. CDO produces plans, workshops, and career resources for the three Counties.

Central New York Resource Conservation and Development Project, Inc.

The Central New York Resource Conservation and Development Project, Inc is a non-profit organization representing 12 counties in central New York: Broome, Cayuga, Chenango, Cortland, Delaware, Madison, Onondaga, Otsego, Schoharie, Sullivan, Tioga, and Tompkins. The Central New York Resource Conservation and Development Project is located in Norwich. Projects include forestry projects, livestock projects, pasteurized poultry, and agri-cluster project.

New York State Economic Development Tools

The New York State Empire State Development

The New York State Department of Economic Development (also referred to as the Empire State Development Corporation (ESD)) is a one-stop shop for a number of programs funded within their department budget, as well as for a variety of other State agency programs. The ESD oversees the issuance of debt under the programs of both the Urban Development Corporation and the Job Development Authority.

New York offers a wide range of financial incentives to assist with a company's site location, new facility construction, existing facility expansion or modernizing existing operations -- all of which can be tailored to the size and scope of a project.

ESD Can Provide Financial Assistance For:

- Acquisition of land and buildings or machinery and equipment;
- Construction or renovation of buildings to house business operations, including leasehold improvements;
- Construction or improvement of infrastructure required for new location or expansion;
- Working capital;
- Employee training;

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- Expanding a company's export opportunities; and
 - Productivity enhancement.

ESD Offers Financial Assistance Through:

- Direct loans and/or grants to businesses for a portion of the eligible project costs;
- Interest rate subsidies in the form of a grant or linked deposit with the lending institution, to reduce the cost of borrowing from private sector financial institutions;
- Loans and grants for working capital assistance in specialized situations; and
- Infrastructure assistance in the form of a loan and grant combination for a portion of the cost of the infrastructure project.

ESD Can Assist:

- Manufacturers;
- Service Providers;
- Warehouse and Distributors;
- Research and Development Companies;
- Tourism/Destination Businesses; and
- Minority- and Women-owned Businesses.

ESD Bonding Capabilities

The Urban Development Corporation (UDC) of the ESD provides bonding programs, which include Correctional and Youth Facilities, Sports Stadium Assistance, Corporate Purpose, and various civic and educational related project revenue bonds. The Job Development Authority provides both taxable and tax-exempt bonds in order to finance programs that lend to businesses. These bonding programs are planned to promote job growth by providing loans to New York companies for construction of office space, expand facilities and acquire machinery and equipment.

Linked Deposit Program

New York State can assist businesses loans at low-rates, these loans may apply to modernization of facilities and operations, access new markets, and improve competitiveness. Linked Deposit Program (LDP) is a public-private partnership, which provides businesses with affordable capital based on bank loans at reduced interest rates.

The Linked Deposit Program Provides:

- Eligible businesses to obtain loans from commercial banks, savings banks, savings and loan associations and farm credit institutions, and the New York Business Development Corporation.

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- A savings of two or three percentage points on the prevailing interest rate for "Linked Loans."
 - The maximum loan amount is \$1,000,000 for four years.

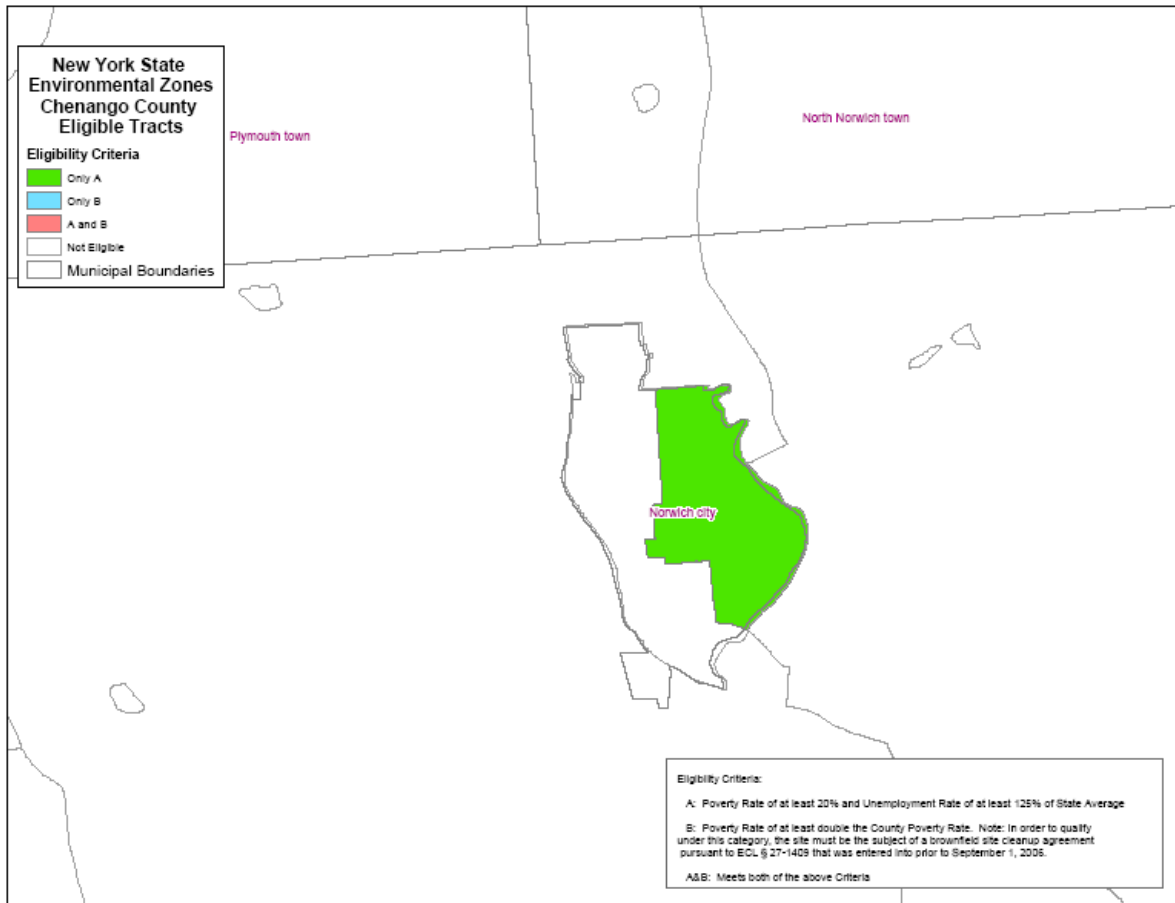
The LDP Can Assist:

- Businesses in the manufacturing industry with 500 or fewer full-time New York State-based employees.
- Businesses in the service industry with 100 or fewer full-time NYS-based employees. These businesses in the service industry must be independently owned and operated and not dominant in their field. Businesses that are personal and professional services are not eligible for this program.
- Businesses certified in an Economic Development Zone/Empire Zone (EDZ) with 100 or fewer full-time NYS-based employees.
- Businesses located in a highly distressed area with 100 or fewer full-time NYS-based employees.
- NYS-certified minority-and women-owned businesses.
- Defense industry manufacturers planning projects to diversify production and take advantage of non-military markets.
- Businesses with 100 or fewer full-time NYS-based employees undertaking a project to increase export activities.

Brownfield Redevelopment

Chenango County has an area that qualifies through the State's funding program for Brownfield redevelopment, as indicated on Map 6. Further information can be obtained from the New York State Empire State Development Regional Representative. The Brownfield Re-Development program is operated through a consortium of State agencies, including Empire State Development, the Department of Environmental Conservation, the Department of State, and others State entities, including the Attorney General's office.

Map 6: New York State Environmental Zone in Chenango County



Source: New York State ESD

New York State Legislative Commission on Rural Resources

The New York State Legislative Commission on Rural Resources prepares the Chenango County Guide to Technical and Financial Assistance for Economic & Business Development Leaders. This directory lists National, State, and local agencies and organizations that offer economic development resources for community leaders in Chenango County. There are brief descriptions of each organization. The guide notes that these organizations work to “complement traditional financial institutions to help communities establish, maintain, expand or modernize their operations, or aid local governments and community agencies to develop strategies for economic development.”

Specific contents of the document include listings of:

- Federal agencies and programs;
- State agencies and programs; and
- Regional/Local agencies and programs.

Some of the agencies listed include:

- U.S. Department of Housing and Urban Development;
- U.S Small Business Administration;
- New York State Department of Economic Development;
- New York State Office of Science, Technology and Academic Research;
- Various SUNY institutions;
- Southern Tier East Regional Planning and Development Board;
- Chenango County Chamber of Commerce;
- Chenango County Department of Planning and Development; and
- Cornell Cooperative Extension of Chenango County.

Many of the listed programs provide technical assistance, training, and/or business counseling. Some financial services include loans and matching grants for economic development, housing, and infrastructure improvements.

The New York Business Development Corporation

The New York Business Development Corporation's (NYBDC) mission is to encourage economic activity in New York State by assisting with loans to small and medium-size businesses and partner banks in making such loans. They assist with minority and women-owned businesses by offering credit opportunities not otherwise available to them.

The NYBDC works with banks to provide term loans to many small business owners, which do not always meet the requirements for traditional financing.

NYS Division of Minority and Women Owned Business Development

New York State's Division of Minority - and Women-owned Business Development (MWBD) assists the State's minority and women's business community to access all the services offered by Empire State Development.

MWBD Can Provide:

- Access to Capital
 - Provides access to ESD and other financial assistance for established businesses, which are leveraging capital to achieve the best results at a lower cost.
- Minority - and women-owned business certification

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- Assists with the entrance into programs designed to assist Minority - and Women-owned Business Enterprise firms statewide.
 - Administers and offers lists of New York State MWBD firms to interested prime contractors to use in realizing sub- contracting goals.
 - Minority - and women-owned procurement assistance
 - Provides guidance on specialized selling opportunities to State and Federal government agencies.
 - Transportation Capital Assistance Program
 - Assists with government contractor loans to MWBEs and small business enterprises that have transportation-related government contracts under NYS Department of Transportation.
 - Makes loans accessible.

NYS Governors Office for Small Cities

The Governor's Office for Small Cities (GOSC) administers funds from the Federal Department of Housing and Urban Development. In administering the program, GOSC must insure that funds are expended to meet three primary National objectives, as follows: 1) benefit to low and moderate income individuals and families; 2) removal of slum and blight; and 3) meet community emergencies. GOSC administers three programs of potential interest to Chenango County.

Technical Assistance

Each year GOSC selects a number of communities for Technical Assistance Grants, primarily to develop Strategic Plans for an area. These plans are often targeted towards developing a sound basis for a future Annual Round Program application. This Economic Development Strategic Plan is financed through this means. Plans can also be developed that support other Federal goals, as noted above. Cost sharing is required.

Annual Round

The Annual Round Program that can offer a number of economic development opportunities for the County and its municipalities. Applications for the Annual Round must be well developed, as the program is very competitive, as any other non-entitlement jurisdiction in the State can apply. In general, to be competitive, these applications must be based on one or more recently adopted plans that highlight and support the object of the application. Possible areas for economic development applications might be Microenterprise Fund Development, Façade Renovation and/or Improvement, and in certain very specific instances, Infrastructure Development oriented to a specific job-creating opportunity. To be successful, target populations must be predominantly low to moderate income. Currently, Open Round applications can be made for up to \$650,000. Both the Annual Round and Open Round discussed below require public hearings, notices, environmental reviews, and other administrative tasks.

Open Round

The Open Round program is oriented towards economic development and allows up to \$750,000 per community per year. This amount is in addition to any annual round grant.

The Economic Development program relates to the creation and/or retention of jobs, and is oriented to low to moderate-income individuals. For retention of jobs, a survey must be taken that shows at least 51% of those positions being retained are low to moderate-income individuals. Alternatively, the company could be expanding and creating new positions, each of which might be offered to low to moderate-income individuals. The government's test in this regard is whether or not the positions being created require a college degree or special training. To determine the potential funding for a company, GOSC uses a number of \$7,500 per job. So a company creating 16 new jobs might be eligible for \$120,000.

The \$120,000 in this example can be no more than 40% of the project's overall cost. In this instance, the overall cost would need to be at least \$300,000, with at least 10% (or \$30,000) being a cash equity infusion. The equity does not necessarily need to be shown up front; it can be pledged through cash flow. The funds can be used for any number of purposes ranging from new construction to machinery and equipment purchases to inventory acquisition to lease payments and payroll, or any combination.

To determine eligibility, basic information is provided to GOSC. If they determine that the project is worth looking at, they then communicate with the local jurisdiction and request that a Preliminary Evaluation Questionnaire (PEQ) be completed. This questionnaire is ten or twelve pages long, and requires considerable detail from the company in terms of financial information.

Once the PEQ is submitted, GOSC has up to 30 days to review it. If they accept it, they then communicate again with the Town requesting that a Final Application be completed, and they give the Town 75 days to do that. A final application is in much the same detail as a regular Annual Round application, and requires more information from the company.

If that is approved, an Environmental Review Record must be completed prior to drawdown of funds. We generally recommend that communities make the grant a loan to the company and have it repaid to the community at a zero, one or two percent interest rate so that the community can build a revolving loan fund for similar purposes into the future.

New York State Department of Transportation

Industrial Access Program

Another program of potential interest is the New York State Department of Transportation's (DOT) Industrial Access Program. It has been designed to balance economic development projects throughout the State where transportation access poses a problem. It may also be used where transportation may offer a unique opportunity to the viability of an economic development project.

A potential applicant should initiate discussion with the Regional Program Coordinator of the New York State Department of Transportation before a formal application is prepared, allowing the potential applicant to obtain up-to-date advice and information.

Federal Economic Development Programs

U.S Department of Commerce, Economic Development Administration

The Economic Development Administration (EDA) has a range of programs that might be potential opportunities for Chenango County.

Public Works

The Public Works Program revitalizes distressed communities to expand, and upgrade their physical infrastructure to attract new businesses, encourage business expansion, diversify local economies, and generate and retain long-term, private sector jobs, establishments, and investment.

Economic Adjustment Assistance Program

The Economic Adjustment Assistance Program assists State and local interests to implement strategies and adjust to the change to an economy. The program focuses on location with an experience of or under threat of serious structural damage to the underlying economic base.

Research and National Technical Assistance

The Research and Technical Assistance Program supports and funds research for economic development organizations.

Local Technical Assistance

The Technical Assistance Program assists to fill the knowledge gaps and information gaps that may prevent leaders in distressed areas in the public and nonprofit sectors from making essential local economic development decisions.

Partnership Planning

EDA's Partnership Planning programs help support local organizations (Economic Development Districts, Indian Tribes, and other eligible areas), They assist with long-term planning efforts and outreach to the economic development community on EDA's programs and policies.

University Center

The University Center Program is a partnership of Federal government and academia that makes the diverse and vast resources of universities available to the economic development community.

Trade Adjustment Assistance

EDA uses a national network of twelve Trade Adjustment Assistance Centers to help manufacturers and producers affected by increased imports prepare and implement strategies to guide their economic recovery. There is a Trade Adjustment Assistance Center at SUNY Binghamton.

VIII. Future Vision and Goals

Chenango County developed this Economic Development Plan to guide the County's future economic growth and expansion. County residents need a solid property tax base, places to work, and places to shop and conduct business. A close examination of the County's existing conditions was conducted to identify the issues facing the County. This examination included demographic research and analysis, business surveys, stakeholder interviews, and, most importantly, public meetings and workshops.

The Economic Development Steering Committee then sought to create a succinct vision broad enough to retain its meaning over time, but targeted enough to guide future economic development decisions.

Chenango County is committed to developing a prosperous and economic friendly environment for current and prospective businesses and residents. Chenango County is dedicated to providing retention, expansion, and attractive incentives for businesses, strengthening the quality of life, and providing a full range services.

Goals, strategies, and actions have been developed to identify specific ways the County, its municipalities, businesses, educational institutions, and entrepreneurs should approach future business development decisions.

It became apparent through the public participation process that some goals and strategies may overlap into multiple categories. The members of the steering committee worked together to determine how to categorize such "hybrid" goals and strategies.

The County should formally adopt this Plan and provide progress updates on the Chenango County Chamber of Commerce website.

Goal 1: Encourage Business and Workforce Development

It was expressed several times during the public participation process that more should be done in the County to foster a business friendly environment and increase workforce development. Many business owners are concerned about the County's ability to retain existing businesses and attract new businesses. Market globalization and stereotypes of rural communities are two factors perceived to have negatively impacted the County's opportunities for growth. Creating and implementing a marketing plan to retain and attract businesses are two of the goals identified for fostering new for business development in the County.

A major concern mentioned during the public participation process was the lack of training skills in Chenango County. The goals and strategies that follow provide opportunities for improvement for business and workforce development in Chenango County.

Strategy 1. Provide supportive business retention programs for small businesses and manufacturing industries.

- Action 1.1. *Develop a human resources network for Chenango County businesses.* Work with surrounding counties and organizations to introduce and promote the new network. Use educational organizations and businesses to connect residents socially and promote networking opportunities.
- Action 1.2. *Maintain and expand countywide entrepreneur assistance program* that assists existing and new business ventures in developing effective marketing programs. Assist existing businesses in identifying and pursuing appropriate funding and grant opportunities, as well as advising businesses on local regulations, acting as their advocate, and providing other types of assistance.
- Action 1.3. *Formalize the economic assistance provided to local manufacturers and other businesses through the development of an Industrial Retention and Expansion (IRE) Program.* IREs can be housed in Community Development Corporations, governmental departments, membership organizations, or State-level authorities. They can provide technology-related or general management assistance, can organize joint purchases, and provide marketing assistance.
- Action 1.4. *Develop a Business Mentoring program* by which local small business owners may network with one another and provide assistance and advice on development business programs, employee training, marketing, and aesthetics. The County, through the local Chambers of Commerce, can provide technical assistance, using the forum as a method for knowledge exchange.
- Action 1.5. *Develop a Chenango County Business Plan Contest.* As part of a six-month competition, entrepreneurs can submit business plans, receive mentoring and feedback, and compete for seed capital. Local representatives from the County Chamber can be tapped to judge the competition and provide feedback on the viability of proposed business plans, while local business students can play a role in working with local entrepreneurs on developing the plans.

Action 1.6. *Use the Chenango County Chamber of Commerce website to promote existing and forthcoming economic development programs available to new and existing businesses. Promote the County as a location for niche manufacturing that supports existing industries.*

Strategy 2. Provide and market a business friendly environment to recruit and attract new businesses.

Action 2.1. *Promote redevelopment of vacant and underutilized parcels throughout the County for viable business uses. The County could market more prominent parcels for uses that would cater to, not only County residents, but also regional residents and tourists. Vacant parcels better positioned for success are those that are highly visible from prominent travel routes.*

Action 2.2. *Continue to utilize the Chenango County Chamber of Commerce website to develop, market, and recruit new businesses. The website could be used to attract commercial, industrial, and agricultural businesses.*

Action 2.3. *Monitor and evaluate the effectiveness of marketing and recruitment package used to attract new businesses.*

Action 2.4. *Create a database identifying each municipality's environmental regulations and development review criteria. This can be useful in prospective businesses navigating through required permits review, site regulations, and codes.*

Action 2.5. *Continue to target businesses that currently supply materials and services to Chenango County businesses and persuade them to relocate to the County.*

Strategy 3. Improve and expand the relationships the County has with educational institutions, businesses, and local governments.

Action 3.1. *Promote the use of existing business assistance programs in Chenango County and/or throughout the region. These business assistance programs provide training for employees, as well as planning and management skills (Cornell Cooperative Extension, Workforce Development Board, BOCES, and Central New York Resource Conservation & Development Project).*

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- Action 3.2. *Support regional efforts to promote workforce and labor force training.* The County can provide information to residents and businesses on the region’s available workforce training resources. Include links on the County Chamber’s website.
- Action 3.3. *Cooperate with local and regional organizations, High Schools, and Chambers of Commerce on educational goals, coordinated efforts for economic development, and follow-through on implementation strategies.* Work with training organizations to allow for training, vocational development, mentoring, and workforce development to prepare students for future jobs.
- Action 3.4. *Support County and regional efforts to promote workforce and labor force training.* The County can provide information to residents or businesses through the County Chamber website and brochures.
- Action 3.5. *Provide information to local communities on how they can work with national franchises and chain stores to fit in with the existing community through adaptive reuse or building design that resembles existing architecture.*
- Action 3.6. *Foster commitments between business development and education institutions.* Create financial incentives or tax breaks to encourage strengthened relationships between businesses and education organizations.

Goal 2: Foster Downtown Revitalization

In addition to creating a friendlier business climate, downtown revitalization and rehabilitation are two methods that can be used to improve areas in need. Chenango County’s Towns, Villages, and City have established Central Business Districts (CBDs) with historic buildings and small, owner-operated establishments. The County should encourage and help facilitate reinvestment in these CBDs and improve the quality of their physical environment as well as the diversity of their retail and service opportunities.

Strategy 4. Promote the four point *Main Street Approach to Downtown Revitalization*[™] to revitalizing CBDs. The *Main Street Four-Point Approach*[™] is a comprehensive strategy that is tailored to meet local needs and opportunities. It encompasses work in four distinct areas — Design, Economic Restructuring, Promotion, and Organization — that are combined to address all of the commercial district’s needs.

Recommendations from the Main Street Four-Point Approach™ have been tailored to many different communities across the United States.

Action 4.1. *Create a commercial development grant/loan program.* Develop a micro-enterprise revolving loan program to assist small business owners. The funds can be used to assist with capital improvements, façade enhancements, machinery and equipment purchase, working capital, or other types of business expansion activities.

Another program may include but is not limited to: a 50% grant/50% loan façade improvement program and/or a micro-enterprise low-interest loan pool. Funds can be awarded or given as incentives to businesses that improve the aesthetic appearance of the community.

Action 4.2. *Provide new and the rehabilitation of existing housing above first floor commercial and/or retail space.* Foot traffic will increase due to the new residents and will be a visual cue to visitors the Main Street is vibrant and alive.

Action 4.3. *Provide guidance to the local CBDs on revitalization efforts.* Provide assistance to local communities on how to foster unique downtowns that compliment each other and strengthen overall retail and service provision in the County. Foster promotional image-building of the County’s downtowns. Foster community pride in what is distinctive and unique about downtown.

Action 4.4. *Design and implement programs to improve the aesthetics in the CBDs.* One program may include a street/landscaping program designed to create Community Gateways. Develop a walkable downtown with visitor’s center, providing brochures and other information.

The CBDs should have architectural design standards, better sign control, landscaping, and implement “build to” and “setback” requirements to protect the area’s pedestrian-oriented development patterns.

Goal 3: Build Tourism

While the County should continue to support its existing tourism resources, particularly those currently meeting success, efforts should be made to expand the County’s tourism resources. The

County should explore ideas to broaden the area’s tourism season, both in terms of traditional tourist activities and new areas of tourism.

Strategy 5. Promote recreational activities using the County’s natural resources—including its agricultural lands, forests, and water resources — as tourism resources.

Action 5.1. *Promote county trails for biking, hiking, water activities, and other types of trails in Chenango County. The trails all could connect to CBDs – providing downtown with tourism opportunities.*

Action 5.2. *Upgraded private and public athletic facilities will allow the County to accommodate local youth teams, and house regional athletic tournaments.*

Action 5.3. *Promote tourism in Chenango County by packaging services and opportunities together. By combining interesting and complimentary types of services, tourism businesses can benefit from the "synergy" created by offering tourist packages.*

Action 5.4. *Create a County Tourism Economic Development Fund to foster the development of new tourism-supportive establishments.*

Strategy 6. Promote Chenango County’s cultural, natural, and historical resources as important contributing elements to the County’s quality of life.

Action 6.1. *Promote an Eco-tourism theme focusing on the County’s many ecological resources. Eco-tourism focuses on exploring the natural environment or learning more about local natural history through bird and other wildlife observation or visits to State Parks, nature centers, and science museums.*

Action 6.2. *Create a comprehensive and coordinated tourist attraction way-finding signage program. Develop coordinated signage for local tourist attractions, tourist establishments, visitor centers, parking, waterfront resources, campgrounds, parks, etc., especially on NYS Route 12 and I-88.*

Strategy 7. Continue and strengthen the existing marketing plan to support year-round tourism.

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- Action 7.1. *Promote heritage tourism and agri-tourism theme focusing on the County’s existing agriculture and agricultural history. Many farm businesses, including farm stands, wineries, maple syrup and honey producers, greenhouses, plant nurseries, and Christmas tree farms, are opening their doors to visitors. Promote Route 12 as a Scenic Byway. The County could work to support its existing resources, as well as encourage the development of new resources, through marketing network opportunities.*
- Action 7.2. *Continue to maintain a calendar of events schedule to promote year-round visitation to the County.*
- Action 7.3. *Develop surveys to gain a better understanding of tourists’ interests and needs. Use this information to proactively build new resources to reinforce and increase visitation.*

Goal 4: Grow Agriculture and Forestry Industries

An efficacious way to preserve agriculture and forestry land is by making agriculture and forestry profitable at the farmer’s or tree farmer’s level. This produces two benefits – preservation of the land in agriculture, and preservation of the agricultural way of life. Farmland retention works best where there is a strong agricultural economy. Chenango County has a strong agricultural history with a local economy based on agriculture and farm protection and promotion efforts.

Chenango County houses a number of State-owned and privately-owned forests. The following goals and strategies promote the use of the County’s available agriculture and timber resources to foster value-added economic opportunities for local property owners and businesses.

Strategy 8. Proactively pursue agriculture development as a form of economic development by developing new markets and products.

- Action 8.1. *Encourage local farmers to pursue marketing through an established brand or a newly created brand.*
- Action 8.2. *Assist and coordinate with local dairy farmers to develop value-added agricultural products such as organic foods and beverages. The County must support and assist wherever possible, such as the Ives Cream ice cream plant and milk and cheese plants, to ensure that such facilities become a reality. The County can assist local farmers in site identification, land assemblage, and funding research.*

Action 8.3. *Expand the current annual marketing brochure promoting the local agricultural industry.* Such a brochure could include a map of local roadside stands, farmers' markets, pick-your-own operations, nurseries and other agricultural items of interests such as fruit wineries, maple syrup, dairy, and herbs.

Strategy 9. Support, sustain, and market the County's existing agriculture and agroforestry businesses.

Action 9.1. *Support the creation of a website with information about grants for agriculture and agroforestry businesses in the County.* This website can connect agriculture producers with each other on issues and topics. The website can also connect agriculture producers with the consumers. The consumers will be able to see what is currently available and how to order the products. Opportunities for marketing agriculture and agroforestry include online and mail order; sales to restaurants and specialty food stores; cooperative marketing; ethnic markets; subscription marketing and CSA farms (community supported agriculture); entertainment farming and agritourism; farm stands, roadside markets, and on-farm sales; pick-your-own; and farmers markets.

Action 9.2. *Provide information to local farmers on the different mechanisms available to assist farmers in maintaining their properties.* These include agricultural assessments, partial reduction in real property taxes for eligible NYS farmland, American Farmland Trust estate planning, and Farm Building Exemptions through NYS Office of Real Property Services (ORPS). Work with farmers to identify ways to reduce taxes.

Action 9.3. *Work with local communities to promote agriculture and forestry industries.* Create natural partnerships between the agriculture and forestry industries with parks, historic sites, festivals, fee hunting, and bed and breakfast operations for business start-ups and enterprise development.

Action 9.4. *Work with existing organizations, such as the Cornell Cooperative Extension and Central New York Resource Conservation and Development Project, with existing programs.*

Action 9.5. *Develop a County Open Space Plan to promote appropriate stewardship and maintenance of the County's public and privately owned forestlands.*

Action 9.6. *Encourage local communities to enact zoning, subdivision review, scenic ridgeline protection overlays, and other land use regulations.*

Action 9.7. *Use available economic development tools to foster a viable agricultural economy. The agricultural industry can be supported through Agricultural Districts, agricultural tax exemptions, and any other appropriate tax exemptions. The County can apply for and facilitate the dissemination of loans and grants from State government agencies, as well as from quasi-government agencies, to local farmers. The County should apply for Grow-NY funding to assist business development whenever possible.*

Action 9.8. *Facilitate relationship building between local educational institutions, such as SUNY Morrisville, and the local agricultural community to introduce students to the agricultural industry and provide farmers with a new perspective on target markets and marketing.*

Strategy 10. Continue to proactively promote the economic development of agroforestry opportunities.

Action 10.1. *Encourage local agroforestry producers to pursue marketing through an established brand or a newly created brand.*

Action 10.2. *Lobby State and National government for assistance with agroforestry production.*

Action 10.3. *Develop agritourism tours, with visits to maple syrup farms, wineries, and tree farms.*

Goal 5: Install Needed Infrastructure

Paramount to the success of the County is the creation or expansion of the County's infrastructure. Promoting information about available vacant lands and buildings were identified as important to the County's future economic development opportunities.

Strategy 11. Provide necessary infrastructure to areas with economic potential.

Action 11.1. *Develop telecommunications infrastructure necessary to support business and residential growth. Many businesses and residents will not*

move into or continue in an area without the availability of cellular communications and high-speed internet capabilities. The capability is missing in many Chenango County communities, and should be addressed.

- Action 11.2. *Explore other energy alternatives as a potential infrastructure opportunity.* Work with local utilities and State to lower the cost of energy and promote ongoing programs such as energy audits and energy saving retrofits.
- Action 11.3. *Develop a database of potentially developable property that is not yet developable because of lack of infrastructure.* Use the database as a tool to promote the sites.
- Action 11.4. *Provide information to local Chenango County communities on various overlay zoning districts that might be appropriate in consideration of the community's local environmental resources.* Such resources might include prime agricultural lands, water resources, hilly topography, and forest coverage.
- Action 11.5. *As of Right Development ("ARD") allows projects compliant with local zoning to obtain a building permit without further referral to planning boards.* ARD works best where the community has up-to-date zoning and a comprehensive plan that includes both zoning and planning and long-term infrastructure plans. Work with County Planning Department to further facilitate and standardize engineering specifications for roads, utilities and other infrastructure improvements are also published, thereby avoiding the possibility that plans need to be redone in order to comply with community requirements.
- Action 11.6. *Continue to establish highway improvement priorities and lobby capital improvements on State Routes throughout the County.*

Goal 6: Maintaining Ongoing Communication and Collaboration Efforts

Chenango County is interested in fostering existing and new regional services for businesses and residents. The goals and strategies that follow call for the continuance of these efforts.

Strategy 12. Foster an environment by which Southern Tier Counties can continue to work together for mutual benefit on programs designed to solidify the local economy and resident population base.

- Action 12.1. *Educate the public, including local government leaders, business representatives, and residents on local efforts, encouraging local "buy-in" and commitment into the process, as it is integral to success.*
- Action 12.2. *Improve communication with State government through ongoing contacts with State offices, representatives, and elected officials.*
- Action 12.3. *Use media resources inside and outside Chenango County to promote the County's many assets and qualities. Use The Evening Sun, The Daily Star, and other local media organizations to keep the public informed on the County activities and new developments. One idea includes the creation of a local radio magazine about Chenango County to promote, educate, and foster the County's identity for the community residents.*
- Action 12.4. *Cooperate with local and regional governments to financially support regional economic development organizations. Cooperate with adjacent regional and County entities to promote economic development in the greater region.*
- Action 12.5. *Investigate funding an Agricultural Economic Developer position, possibly a joint position with adjacent rural counties.*

IX. Implementation

Introduction

This section includes a list of achievable community development and revitalization goals. Each goal is supported by a number of implementation actions. In the Action Matrix that follows, the implementation actions have been identified by type of action and characterized as either “short-term,” or “long-term.” In addition, a responsible or lead party has been designated and potential funding sources have been identified wherever possible.

The Community Development Strategic Plan recommends the creation of a Economic Development Entity to oversee and implement recommended economic development actions. This Economic Development Entity is noted as “EDE” in the Action Matrix, although the name and type of managing team is yet to be determined.

The recommended time frame is indicated by the following code:

S - Short (or near) term - Next twelve months - To April of year 2007.

M – Midterm (or intermediate): Next Three Years - April of year 2009.

L – Long term: Three to Five years – To the end of year 2011.

O – On-going.

The following table gives the complete names of the agencies that are abbreviated on the Action Matrix Sheets.

Acronym	Full Name
BID	Business Improvement District-Norwich
BOCES	NYS Board of Cooperative Education Services (Delaware-Chenango-Madison-Otsego BOCES)
CNYRCDP	Central New York Resource Conservation and Development Project
CC-IDA	Chenango County Industrial Development Agency
CDO-WIB	Chenango-Delaware-Otsego Workforce Investment Board
CCE	Cornell Cooperative Extension-Chenango County
CDBG	Community Development Block Grant
CF	Conservation Fund
CLG	Certified Local Government

CW/CA	Clean Water/Clean Air Bond Act
ESDC	Empire State Development Corp
EZ	Empire Zone
GOSC-TA	Governor's Office for Small Cities - Technical Assistance Program
GROW-NY	Grow NY through NYS Agriculture and Markets
HHS CSBG	Health & Human Services – Community Service Block Grant
HTFC-MSNY	Housing Trust Fund Corporation - Main Street New York Program
IMLS	Institute of Museum & Library Services
MANY	Museum Association of New York
NPS - LWCF	National Park Service – Land & Water Conservation Fund
NYS Ag. & Mkts	NYS Energy Research Development Authority
NYSBD	NYS Banking Dept.
NYSBDC	NYS Business Development Corporation
NYSCA	NYS Council on the Arts
NYSCS	NYS Canal System
NYSDA	NYS Dept. of Aging
NYSEDEC	NYS Dept of Environment Conservation
NYS DHCR	NYS Div. Of Housing & Community Renewal
NYSDOL	NYS Dept. of Labor
NYS DOS TA	NYS Department of State Technical Assistance
NYS DOS QC	NYS Department of State Quality Communities
NYSDOT	NYS Department of Transportation
NYSDOT TEP	NYSDOT Transportation Enhancement Program
NYSDOT TIP	NYSDOT Transportation Improvement Program
NYSED	NYS Education Department
NYSEDD	NYS Economic Development Dept.
NYSERDA	New York State Energy Research and Development Authority
NYPF	NY Planning Federation

NYSHFA	New York State Housing Finance Agency
NYSOPRHP	NYS Office of Parks, Recreation & Historic Preservation
PF	Private Foundations
RLF-CC	Revolving Loan Fund for Chenango County
RFL-S	Revolving Loan Fund for Sherburne
RUS	Rural Utility Service
SARA	State Archives and Records Administration
SBA	Small Business Administration
SBF	Scenic Byways Foundation
SHPO	State Historic Preservation Office (same as NYS OPRHP)
SMSI	Shared Municipal Services Initiative through NYS Department of State
SNYM	State of New York Mortgage (Home of Your Own Program)
STERPDB	Southern Tier East Regional Planning Development Board
SUNY	State University of New York -Morrisville in Norwich
TEA-21	Transportation Equity Act for the 21 st Century
USDA	US Dept of Agriculture
USDOI- RICA	US Dept. of the Interior, Rivers Trails, & Conservation Assistance
USDOJ	US Department of Justice

* Bold are local or regional organizations

Action (Tasks)	Time Frame	Responsible Party	Possible Funding	
GOAL 1: ENCOURAGE BUSINESS AND WORKFORCE DEVELOPMENT				
Strategy 1: Provide supportive business retention programs for small businesses and manufacturing industries.				
1.1	Develop a human resources network for Chenango County businesses.	S	County Chamber of Commerce	SMSI, SBA, ESDC
1.2	Maintain and expand countywide entrepreneur assistance program.	S	Chambers of Commerce	CDBG, ESDC
1.3	Formalize the economic assistance provided to local manufacturers and other businesses through the development of an Industrial Retention and Expansion (IRE) Program.	M-O	CC-IDA	GOSC-TA
1.4	Develop a Business Mentoring program.	M	County Chamber of Commerce	BOCES, ESD EDI
1.5	Develop a Chenango County Business Plan Contest.	M	County Chamber of Commerce	Local
1.6	Use the Chenango County Chamber of Commerce website to promote existing and forthcoming economic development programs available to new and existing businesses.	O	County Chamber of Commerce	Local
Strategy 2. Provide and market a business friendly environment to recruit and attract new businesses.				
2.1	Promote redevelopment of vacant and underutilized parcels throughout the County for viable business uses.	O	County Chamber of Commerce	EZ
2.2	Continue to utilize the Chenango County Chamber of Commerce website to develop, market, and recruit new businesses.	O	County Chamber of Commerce	Local
2.3	Monitor and evaluate the effectiveness of marketing and recruitment package used to attract new businesses.	M	County Chamber of Commerce	Local
2.4	Create a database identifying each municipality's environmental regulations and development review criteria.	M	County Chamber of Commerce	SMSI

Action (Tasks)		Time Frame	Responsible Party	Possible Funding
2.5	Continue to target businesses that currently supply materials and services to Chenango County businesses and persuade them to relocate to the County.	O	Local Chambers, Local Businesses	EZ, CDBG
Strategy 3. Improve and expand the relationships the County has with educational institutions, businesses, and local governments.				
3.1	Promote the use of existing business assistance programs in Chenango County and/or throughout the region. These business assistance programs provide training for employees, as well as planning and management skills.	S	STERPDB, CDO-WIB, BOCES	CDBG, ESDC, SBA, BOCES
3.2	Support regional efforts to promote workforce and labor force training.	O	STERPDB, CDO-WIB, BOCES	ESDC, BOCES, SMSI
3.3	Cooperate with local and regional organizations, High Schools, and Chambers of Commerce on educational goals, coordinated efforts for economic development, and follow-through on implementation strategies.	S-O	BOCES, High Schools, Local Businesses, CDO-WIB	SMSI
3.4	Support County and regional efforts to promote workforce and labor force training.	O	STERPDB, CCE, CDO-WIB, BOCES	NYSBDC, BOCES, SMSI
3.5	Provide information to local communities on how they can work with national franchises and chain stores.	O	CCE, BID, Chambers	ESDC
3.6	Foster commitments between business development and education institutions.	M	CDO-WIB, BOCES, SUNY, Opportunities for Chenango	CCE, BOCES, SMSI
GOAL 2: FOSTER DOWNTOWN REVITALIZATION				
Strategy 4. Promote the four point Main Street Approach to Downtown Revitalization™ to revitalizing CBDs.				
4.1	Create a commercial development grant/loan program.	S	Towns, Villages, BID, City	CDBG, NYMS

Action (Tasks)		Time Frame	Responsible Party	Possible Funding
4.2	Provide new and the rehabilitation of existing housing above first floor commercial and/or retail space.	M	Towns, Villages, BID, City	CDBG, NYMS
4.3	Provide guidance to the local CBDs on revitalization efforts.	S	County	NYPF, GOSC-TA, SMSI
4.4	Design and implement programs to improve the aesthetics in the CBDs.	M	Towns, Villages, BID, City	NYSDOS-QC, NYSDOT-TEP, NYMS, CDBG
GOAL 3: BUILD TOURISM				
Strategy 5. Promote recreational activities using the County’s natural resources—including its agricultural lands, forests, and water resources—as tourism resources.				
5.1	Promote county trails for biking, hiking, water activities, and other types of trails in Chenango County.	M	County, Towns, Villages, City	CW/CA, SBF, USDOJ-RICA, NYSDOS-QC
5.2	Upgraded private and public athletic facilities.	L	County	CW/CA, NYSOPRHP
5.3	Promote tourism in Chenango County by packaging services and opportunities together.	M	County Chamber of Commerce	ESDC
5.4	Create a County Tourism Economic Development Fund to foster the development of new tourism-supportive establishments.	M	County Chamber of Commerce	ESDC
Strategy 6. Promote Chenango County’s cultural, natural, and historical resources as important contributing elements to the County’s quality of life.				
6.1	Promote an Eco-tourism theme focusing on the County’s many ecological resources.	L	County Chamber of Commerce	NYSDOS-QC
6.2	Create a comprehensive and coordinated tourist attraction way-finding signage program.	M	Towns, Villages, City	NYSDOT-TEP
Strategy 7. Continue and strengthen the existing marketing plan to support year-round tourism.				
7.1	Promote heritage tourism and agri-tourism theme focusing on the County’s existing agriculture and agricultural history.	S	County Chamber of Commerce	NYSDOS-QC, GROW-NY, USDA

Action (Tasks)		Time Frame	Responsible Party	Possible Funding
7.2	Continue to maintain a calendar of events.	O	County Chamber of Commerce	Local
7.3	Develop surveys to gain a better understanding of tourists' interests and needs.	M	County Chamber of Commerce	Local
GOAL 4: GROW AGRICULTURE AND FORESTRY INDUSTRIES				
Strategy 8. Proactively pursue agriculture development as a form of economic development by developing new markets and products.				
8.1	Encourage local farmers to pursue marketing through an established brand or a newly created brand.	S	CCE	NYS Ag. & Markets, GROW-NY, USDA, ESDC
8.2	Assist and coordinate with local dairy farmers to develop value-added agricultural products such as organic foods and beverages.	M	CCE	NYS Ag. & Markets, GROW-NY, USDA, ESDC
8.3	Expand the current annual marketing brochure promoting the local agricultural industry.	L	CCE	NYS Ag. & Markets, GROW-NY, USDA, ESDC
Strategy 9. Support, sustain, and market the County's existing agriculture and agroforestry businesses.				
9.1	Support the creation of a website with information about grants for agriculture and agroforestry businesses in the County.	S-O	CCE	NYS Ag. & Markets, GROW-NY, USDA
9.2	Provide information to local farmers on the different mechanisms available to assist farmers in maintaining their properties.	S-O	CCE	NYS Ag. & Markets, GROW-NY, USDA
9.3	Work with local communities to promote agriculture and forestry industries.	S-O	CCE	NYS Ag. & Markets, GROW-NY, USDA
9.4	Work with existing organizations, such as the Cornell Cooperative Extension and Central New York Resource Conservation and Development Project, with existing programs.	S-O	CCE, CNYRCDP	CCE

Action (Tasks)		Time Frame	Responsible Party	Possible Funding
9.5	Develop a County Open Space Plan to promote appropriate stewardship and maintenance of the County's public and privately owned forestlands.	L	County	NYSDOS-QC
9.6	Encourage local communities to enact zoning, subdivision review, scenic ridgeline protection overlays, and other land use regulations.	S-O	Towns, Villages, & City	NYS DOS-QC
9.7	Use available economic development tools to foster a viable agricultural economy.	S-O	County Chamber of Commerce, CCE	GROW-NY, NYS Ag. & Markets
9.8	Facilitate relationship building between local educational institutions, such as SUNY Morrisville, and the local agricultural community to introduce students to the agricultural industry and provide farmers with a new perspective on target markets and marketing.	M-O	BOCES, SUNY	CCE, BOCES, SMSI
Strategy 10. Continue to proactively promote the economic development of agroforestry opportunities.				
10.1	Encourage local agroforestry producers to pursue marketing through an established brand or a newly created brand.	S-O	CCE	GROW-NY, NYS Ag. & Markets, USDA
10.2	Lobby State and National government for assistance with agroforestry production.	S-O	County	Local
10.3	Develop agritourism tours.	S-O	County Chamber	GOSC-TA, NYSDOS-QC
GOAL 5: INSTALL NEEDED INFRASTRUCTURE				
Strategy 11. Provide necessary infrastructure to areas with economic potential.				
11.1	Develop telecommunications infrastructure necessary to support business and residential growth.	S-O	Towns, Villages, City	ESDC
11.2	Explore other energy alternatives as a potential infrastructure opportunity.	M-O	County	NYSERDA
11.3	Develop a database of potentially developable property that is not yet developable because of lack of infrastructure.	S-O	County Chamber of Commerce	SARA
11.4	Provide information to local Chenango County communities on various overlay zoning districts that might be appropriate in consideration of the community's local environmental resources.	S-O	County	NYSDOS-TA

Action (Tasks)		Time Frame	Responsible Party	Possible Funding
11.5	As of Right Development ("ARD") allows projects compliant with local zoning to obtain a building permit without further referral to planning boards.	M	County	NYSDOS-QC, NYSDOS-TA
11.6	Continue to establish highway improvement priorities and lobby capital improvements on State Routes throughout the County.	O	County	NYSDOT-TEP, NYSDOT-TIP
GOAL 6: MAINTAINING ONGOING COMMUNICATION AND COLLABORATION EFFORTS				
Strategy 12. Foster an environment by which Southern Tier Counties can continue to work together for mutual benefit on programs designed to solidify the local economy and resident population base.				
12.1	Educate the public, including local government leaders, business representatives, and residents on local efforts, encouraging local "buy-in" and commitment into the process, as it is integral to success.	S-O	County, Chambers of Commerce	Local
12.2	Improve communication with State government through ongoing contacts with State offices, representatives, and elected officials.	S-O	County	Local
12.3	Use media resources inside and outside Chenango County to promote the County's many assets and qualities.	O	County Chamber of Commerce	Local
12.4	Cooperate with local and regional governments to financially support regional economic development organizations.	O	Counties, CDO-WIB, STERPDB	SMSI
12.5	Investigate funding an Agricultural Economic Developer position, possibly a joint position with adjacent rural counties.	S-O	CDO-WIB, STERPDB	SMSI, USDA, NYS Ag. & Markets