

# Franklin County, NY Comprehensive Economic Development Strategy

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Prepared for:

County of Franklin Industrial Development Agency  
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## About Camoin Associates

Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. We specialize in real estate development feasibility and the economic and fiscal impact of public and private investments. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to Texas; corporations and organizations that include Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$600 million. Our reputation for detailed, place-specific, and accurate analysis has led to projects in twenty states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on Facebook.

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# ACKNOWLEDGEMENTS

## County of Franklin Industrial Development Agency Mission Statement:

*The County of Franklin IDA is committed to serving new and existing businesses and industries, and to assist with the creation and retention of quality jobs by facilitating strategic investment for the economic well-being of Franklin County.*

The development of the Franklin County Comprehensive Economic Development Strategy involved numerous members of the Franklin County community. Below is a list of the people and organizations that made this analysis possible.

## Steering Committee Members:

Joe Campbell – OneWorkSource and BOCES  
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Beverly Cook – Saint Regis Mohawk Reservation  
Tribal Chief  
Tim Coughlin – Shon Parker Design  
Doug DiVello – Alice Hyde Medical Center  
John Dowd – Northern Energy  
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Kirby Selkirk – Franklin County Farm Bureau  
Steve Shafer – FEH BOCES  
Louise Taylor – Malone Town Board  
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## Advisory Committee Members:

Maria Bourgeois – Executive Assistant, County of  
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### Attachments:

- Attachment A – Economic Base Analysis
- Attachment B – Relevant Cluster Analysis
- Attachment C – County Profile Summary
- Attachment D – SWOT Analysis
- Attachment E – Plan Implementation Benchmarking Guidance
- Attachment F – Glossary of Terms
- Attachment G – Economic Development Organization Structure Chart
- Attachment H – Priority Project List
- Attachment I – EDA Requirement List



## Introduction

Franklin County's economy is uniquely characterized by a mix of downtowns, cutting edge biotech research, and massive amounts of open space. Located in northern New York, the county has recently struggled to maintain existing business in order to be able to retain local residents, attract young people, and improve quality of life. In order to reverse the trend of declining wages and stagnant population and instead capitalize on the county's emerging opportunities, the County of Franklin Industrial Development Agency ("IDA") commissioned Camoin Associates to assist with the completion of a Comprehensive Economic Development Strategy ("CEDS"). The goal of a CEDS is to study existing economic conditions, identify particular competitive advantages for the region, and develop unique strategies to help move the region towards the future.

The CEDS process is designed to follow a three-phase approach that includes (1) studying existing conditions, (2) developing priority projects, and (3) completing the plan. Throughout the process there are opportunities for public engagement, discussions with experts in particular areas, and use of a steering committee to guide the planning process.

The most recent CEDS completed in Franklin County was done in 2005, and the U.S. Economic Development Administration ("EDA") recommends a complete update every five years. This document represents an update to the 2005 CEDS and includes a summary of the research and data collection completed, the County's vision statement and the Action Plan Matrix that outlines how the plan will be implemented. It is anticipated that this document, and the Action Plan Matrix in particular will be used at all levels of government to help direct economic development initiatives throughout Franklin County.

The Action Plan Matrix includes an overall vision for economic development in Franklin County, five unique goals for achieving that vision, individual strategies for achieving the goals, and finally suggested tasks to implement the strategies.



*Steering Committee working session at The Wild Center. Source: County of Franklin IDA*

## Work Completed

To develop a Comprehensive Economic Development Strategy for Franklin County, Camoin Associates conducted market research, collected data, interviewed business owners and stakeholders, and reviewed existing reports. The first step was to review other relevant documents to ensure this CEDS would align with previous and concurrent initiatives. Documents reviewed include:

- Franklin County CEDS – 2005
- Town and Village of Malone Final Economic Development Plan – 2009
- North Country Sustainability Plan
- North Country Regional Economic Development Council Plan and Progress Reports
- Village of Saranac Lake Economic Development Plan
- Town and Village of Tupper Lake Economic Development Plan
- New York State Correctional Services Adaptive Reuse Plan for Camp Gabriels
- Information from the Workforce Development Institute website

- Department of Environmental Conservation 1996 Unit Management Plan for the Remsen-Lake Placid Corridor. <sup>1</sup>Note that this Unit Management Plan is in discussion about how best to use

To better understand the past, present, and projected economic environment of Franklin County, Camoin Associates collected data from a variety of sources including Economic Modeling Specialists, Inc., ESRI Business Analyst Online, and the 2012 Agriculture Census. Using this data, Camoin Associates developed an economic base analysis that included information on major industry sectors (past and projected growth); occupational data (past and projected growth); a shift-share analysis of major industries; and demographic information. This information was collected for Franklin County, the North Country region, and Upstate New York. From this data, Camoin Associates identified the most important industry clusters in the county.

After gathering data about the general economic environment in Franklin County, Camoin Associates focused on five relevant industry clusters: Agriculture and Food Processing; Environmental Science and Biotechnology; Forestry and Wood Products; Health Care and Wellness; and Tourism, Culture, and


Recreation. This study of the relevant industry clusters included additional data analysis and market research on the clusters and local, national, and global trends. Focused market research on data centers, yogurt manufacturing, and wood pellet production was also conducted.

In addition to collecting data on economic, occupational, and industry trends, Camoin Associates interviewed local private business owners and stakeholders. These interviews supplemented the data and other research with local knowledge of the obstacles and opportunities in Franklin County and included feedback and suggestions as to the types of projects that should be included in the final plan.

At key intervals in the CEDS process, Camoin Associates engaged the County of Franklin IDA staff, the CEDS steering committee and advisory committee, and Franklin County residents to develop and refine the strengths, weaknesses, opportunities, and threats (SWOT) analysis and vision statement, solicit feedback on the findings from research and data collection, and



<sup>1</sup> Note that during the writing of this plan New York State was in discussions about how best to use the Remsen-Lake Placid Rail Corridor including whether to leave the existing rail infrastructure or remove some of it in order to develop a multi-use recreational trail. The Franklin County CEDS is supportive of a Unit Management Plan that maximizes the economic benefit to Franklin County.



determine appropriate projects to implement the recommendations of the plan. The steering and advisory committee is made up of a mixture of public and private stakeholders with knowledge and an interest in the future of the Franklin County economy.

The full Demographic and Economic Base Analysis, SWOT Analysis, and Relevant Cluster Analysis can be found in the attachments at the end of this document.

## Summary of Findings

The research conducted as part of the Demographic and Economic Base Analysis, SWOT Analysis, and the Relevant Cluster Analysis served to inform the goals and strategies outlined in the Action Plan Matrix. What follows is a summary of some of the major findings of this research and how it relates to the CEDS.

### Demographic and Economic Base Analysis

The Demographic and Economic Base Analysis was completed to better understand the existing conditions for Franklin County including age distribution, area income, educational attainment, industry trends, major employers, largest occupations, and other data points. This analysis is used to identify key clusters and guide the development of the CEDS in a way that builds on current strengths of the county and identifies potential emerging assets. Some of the key findings from this analysis include:

- Population of Franklin County is projected to remain steady over the next five years and gain approximately 500 new residents (+1%).
- Average household income in Franklin County is about \$56,000, almost \$14,000 less than that of Upstate New York (all New York counties excluding New York City and Long Island).
- 55% of Franklin County residents have a high school diploma or less as their highest level of education, compared to 42% in Upstate New York as a whole. This is important to understand when considering the type of jobs that can be filled and the educational needs of residents in order to prepare them for employment.
- The Franklin County economy is dominated by Government, Health Care and Social Services, and Retail Trade. These are industries that tend to serve the immediate community rather than attract wealth or export goods.
- Overall the county has seen 7% growth in employment since 2003, with that growth being driven by the Health Care and Social Assistance industry (particularly hospitals, mental health facilities, and other health practitioners) and the Administrative and Support and Waste Management and Remediation Services industry.
- Compared to the national average, Franklin County has a very high concentration of employment in the Agriculture, Forestry, and Fishing industry.
- Very few of the top occupations in Franklin County require more than a high school diploma or GED. The few that require more include: Registered Nurses, Teacher Assistants, Postsecondary Teachers, and Elementary School Teachers. This suggests that residents who grow up in Franklin County and get a higher education may find it difficult to stay or come back to the county for work. There are, however, many other occupations in the county that do require some form of higher education including Accountants, Doctors, Lawyers, Physicians Assistances, Counselors, and many others the number of these jobs is just not as great as the jobs that require less education.



## SWOT Analysis

As part of the data gathering process a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis was completed. This helps to identify the assets that the county can build on as well as the challenges that may need to be mitigated. The full SWOT Analysis can be found as an attachment; some of the themes identified in each category are below.

### Strengths

- High quality agricultural land and local/natural food trends
- Natural environment and natural resources
- Tourism amenities including the Saint Regis Mohawk Reservation and proximity to markets
- Growth in tourism and recreation spending regionally, nationally, and globally
- Environmental education and R&D programs supporting the emerging biotech clusters
- Hardworking people with a community spirit of helping

### Weaknesses

- Competing in highly competitive and/or slowing/declining industries
- Lack of economic development capacity
- Distance to significant markets
- Small skilled labor pool, aging workers, and inadequate workforce programs
- High cost of large development projects
- Lack of essential infrastructure including broadband and cell service

### Opportunities

- Create economic development services
- Expand partnerships and collaborations to support growth of the Biotechnology Cluster
- Increase recognition of the area for cutting-edge research in Environmental Science and Biotechnology Cluster
- Enhance the Tourism Cluster by creating additional amenities and services
- Pass the Occupancy Tax to support tourism and economic development

### Threats

- Global competition within Agriculture and Forestry industries
- Continued changes to the penal system in New York State and loss of correctional facility jobs
- Franklin County's fiscal situation
- Changes to the Health Care Industry including increased costs, shrinking health care infrastructure, and few jobs in health care facilities

## Relevant Cluster Analysis

The Relevant Cluster Analysis looked at five clusters that play an important role in Franklin County's economy. The clusters were deemed to be relevant based on a number of factors including whether they had a historic importance, were currently a major employer for the county and/or whether, with support, they could emerge as important in the future. The five clusters researched include: Agriculture and Food Products; Health Care and Wellness; Forestry and Wood Products; Environmental Science and Biotechnology; and Tourism, Culture and Recreation. Our research considered national and global trends for each cluster as well as what is occurring in Franklin County and the region to begin to determine opportunities or future potential for the cluster in the county. This research considered how the organizations, trends, and work being done in Franklin County fits into the larger picture of the industry/cluster and how Franklin County can capitalize on the ever-changing economic climate that is impacting many of these clusters. Some of the key findings from this analysis include:

- Three of the five Relevant Clusters have been identified as legacy industries because of their historic importance in Franklin County's economy. These clusters include Agriculture, Forestry, and Health Care. The Environmental Science and Biotechnology Cluster is considered to be emerging and the Tourism Cluster, while historically important, can be further strengthened through targeted enhancements and investments.
- The legacy industries have long played an important role in Franklin County's economy. However, when considering opportunities for Agriculture and Forestry, it is apparent that new legislation, the highly competitive nature of the industries, and changes in the Upstate economy have made it difficult for these industries to be strong drivers of new growth and/or new employment. Our analysis recommends that the county continue to support these legacy industries to ensure that they remain viable opportunities in Franklin County but not focus resources at the expense of other emerging industries that are more likely to lead to future economic growth.
- The Health Care and Wellness Cluster is one of the largest employers in Franklin County and it is changing rapidly as legislation, technology, and best practices are revised regularly. A big challenge for rural health care system providers, including those in Franklin County, is finding high quality staff. Additionally, health care is more and more reliant on collaboration with regional providers to provide tele-medicine and offer access to a wider range of specialty services to rural patients. Franklin County hospitals have been collaborating with other regional providers and this will need to continue in order to provide high-quality care to residents.
- Changes in the global economy have made it even more important that Franklin County find ways to grow from within and nurture the entrepreneurial spirit of residents, both young and old. While there are opportunities within the various relevant clusters, finding ways to help entrepreneurs and small business owners be successful by differentiating themselves and serving a niche market will be essential to any strategy to grow Franklin County's economy.
- The Tourism Cluster represents significant opportunities for Franklin County as the industry is growing and people are spending more money than ever on recreation. Franklin County has a range of opportunities to appeal to a variety of visitors ranging from wellness tourism to adventure tourism. Franklin County is already capturing some visitors but there is an opportunity

to create more events and encourage visitors to stay longer and spend more money. Our analysis suggests that this can be accomplished by having more modern lodging facilities and increasing the number of events/activities available.

- When completed, the Adirondack Club and Resort will have a major impact on the Tourism Cluster in Franklin County and will create opportunities to serve new visitors to the Tupper Lake region. Franklin County's current retail services base will need to be enhanced to target this market and serve these new visitors and consumer preferences.
- The Environmental Science and Biotechnology Cluster is one of the most interesting opportunities because while it currently has a relatively small impact in terms of total number of jobs, the potential to grow the cluster within the region and capitalize on the existing local and regional assets is impressive. The assets range from educational (Paul Smith's, The Wild Center), experiential (Adirondack Public Observatory) to research and development (The Trudeau Institute), all with the common thread of science exploration and education. The work that is underway between the Trudeau Institute and Clarkson University on immuno-engineering and collaborations between Paul Smith's and Trudeau Institute on Lyme disease research is encouraging and showcases the type of collaboration that is possible.
- Our research highlighted the unique values of the Adirondacks around environmental sustainability, strong independence, creative problem solving, and a reluctance towards economic development. While some of these characteristics have made it difficult for other industries to be successful within the Blue Line and in Franklin County, if framed correctly the growth of the Environmental Science and Biotechnology Cluster will perfectly fit into those values. Building the Environmental Science and Biotechnology Cluster with an eye towards solving local and regional environmental problems that can be replicated on a national or global scale will support local research and development as well as eventual commercialization, production, and distribution. Examples of environmental problems that impact the Adirondacks and other areas globally include invasive species, water and waste water treatment, alternative energy options, groundwater contamination, and others. By working to solve these problems in a creative and environmentally sustainable way there will be **opportunities to partner and collaborate with environmental organizations** that may otherwise be adverse to "economic development."

## Vision Statement

This vision statement has been developed by the committee to capture what they want Franklin County to be like in the year 2025.

Over the past decade a shift in economic development thinking has taken root, resulting in more families, businesses, and visitors throughout Franklin County. The improved electronic highway and infrastructure has strengthened the entrepreneurial culture, which has led to new and innovative businesses that are reviving the county's communities and downtowns. Collaborative partnerships have been strengthened between regional higher education and research institutions, creating a thriving environmental research and biotechnology cluster. Students, teachers and businesses are finding ways to create economic opportunities by advancing sustainable solutions to local and global environmental issues. County economic development initiatives have helped sustain the legacy industries of agriculture, forestry, and health care, and the emerging tourism cluster is capitalizing on new opportunities to improve the visitor experience and quality of life for residents.

## Goals

Following the completion of the data collection, stakeholder interviews, SWOT analysis, and vision development, Camoin Associates and the committees worked to identify particular goals that would lead to the full realization of their vision. The following section includes a summary of each of the goals and some of the individual strategies associated with them. Throughout this section there are sidebar highlights that showcase where these efforts are already occurring throughout Franklin County. The detailed guide to implementation of these goals can be found as part of the Action Plan Matrix.

It is important to note that although many of the goals focus specifically on work to be done in Franklin County, it is equally important that organizations and agencies in Franklin County work regionally, including with neighboring Canadian communities. Additionally, where “regional partnership” or “regional collaboration” is called for this includes partners beyond the borders of Franklin County and the United States as applicable. For example, the North Country Regional Economic Development Council has recently adopted a global business strategy and opportunities to work within that initiative may benefit many of the goals and objectives identified in this plan.

The goals that have been identified include:

1. Improve economic development climate and implementation capacity
2. Promote an entrepreneurial culture
3. Support legacy industries in retention and expansion
4. Support the emerging environmental science and biotechnology cluster
5. Enhance tourism opportunities throughout the county

Many companies and institutions in Franklin County are already engaged in the kinds of initiatives proposed in this plan, including investment in tourism, partnerships to support research and education, and entrepreneurship. These local successes demonstrate the feasibility of proposed action items and the economic potential of the county.

## Goal 1

# Improve the County's Economic Development Climate and Implementation Capacity

This goal focuses on ways to increase the county's ability to implement the CEDS plan and improve the business climate in Franklin County through business retention efforts, improving infrastructure, and analyzing workforce issues. Without increased capacity for economic development in Franklin County it will be extremely difficult to implement the goals and initiatives identified in this plan. The County's Industrial Development Agency is doing great work with their current capacity but in order to implement the plan and grow the county economy it will be necessary to increase capacity by adopting a more effective economic development management and funding model that is being used successfully elsewhere in the U.S.

### New Organizational Structure

In an effort to access additional funding streams, especially from the private sector, many economic development organizations (EDOs) have changed to, or are being established as, public-private partnerships or even private organizations from a strictly public entity. Newer and more successful EDOs are being funded and driven by the private sector, with some financial support and leadership inclusion by public sector representatives. This plan recommends the creation of a new Economic Development Organization (EDO) or "Local Development Corporation" (LDC) that is funded through public and private donations. This EDO should have staff dedicated to the implementation of this plan and should have a board that is representative of the relevant industries, educational institutions, workforce, and government entities.

In order to fully implement the CEDS it will be important to have a combination of offices and advisory committees that are dedicated to economic development in Franklin County. The new EDO organizational chart that can be found in Attachment H illustrates the different offices and advisory committees that have been identified in the Action Plan Matrix to be used for implementation. The Administration office would include an Executive Director who reports back to the Board of Directors. The Board of Directors should be made up of a mix of representatives of both the public and private sector including educational institutions, county agencies, business owners, bankers, industry associations, and others. The Board should not be government appointed but rather private sector driven and include broad representation of the economy in Franklin County.

### New Funding For Economic Development

According to the International Economic Development Council (IEDC), "funding for economic development organizations (EDOs) is changing in response to several global, national and local shifts. Reduced public funding, enhanced scrutiny, increased accountability demands, changes in foundation funding preferences, the Great Recession, and the weak global economy are the major issues that EDOs are responding to. Not only are funding mechanisms impacted, but also EDO structures and their business practices." A 2013 survey and study conducted by IEDC found that the historic ratio of public to private funding for EDOs has reversed in recent years. Whereas a few decades ago, 70% of EDO funding came from public sources and 30% from private sources; the opposite is now true. In-kind contributions and fee-for-service contracts are two revenue streams that are more commonly used by EDOs now.

Securing the funding and support for an LDC focused on comprehensive economic development is the second step towards increasing capacity in Franklin County. While this funding should include support from Franklin County and perhaps other localities as partners, most financial resources should come from private sector businesses, particularly those that would be directly impacted by the various industries targeted in the CEDS initiatives.

It is recommended that the new EDO pursue the following three avenues for funding:

1. Public Sector - make a formal request for initial seed financial support from the Franklin County Legislature and perhaps its localities including the numerous Towns and Villages. This funding would be an annual and ongoing funding source and could include a percent of the retail sales tax.
2. Occupancy tax – continue to support the establishment of an occupancy tax through the NYS Legislature. If successful, a portion of this new revenue source would be provided to implement the CEDS tourism related initiatives.
3. Private Sector – a growing number of EDOs are now establishing an organized and well managed fundraising campaign. Following the completion of the CEDS and along with the creation of the new entity, the EDO Board should identify and engage an experienced firm that specializes in economic development operational and capital fundraising campaigns. While primarily private for-profit focused, other private not-for-profit entities may also be approached. This form of funding economic development efforts is growing rapidly throughout the U.S. and there are a number of campaign firms that have had tremendous success in New York State already.

Some of the partners that will be key to achieving this goal include the Industrial Development Agency, regional colleges, private industry, NYS Department of Transportation, NYS Empire State Development, and others.

Other strategies that have been identified to support this cluster include:

- Provide public officials with training and information related to economic development.
- Enhance existing business retention, expansion, and attraction efforts.
- Review all infrastructure for necessary improvements and upgrades.
- Host an event for parents, teachers, and guidance counselors to highlight a wide range of career opportunities
- Conduct a full workforce analysis.
- Develop networking opportunities to nurture the county's economy and combat issues related to attracting talent.

Communities in New York State and around the country can no longer rely solely on one large employer or industry for employment opportunities; a major shift needs to happen where residents are encouraged and challenged to create their own businesses and grow the economy from within. Residents of Franklin County have long depended on the stability of government and health care employment. While health care remains an important industry in the county, government jobs have been lost as correctional facilities close and state government reduces employment. With the loss of these jobs it is imperative that residents, young and old, begin to realize the potential opportunities associated with being an entrepreneur and creating their own business right in Franklin County.

## Goal 2

# Promote an Entrepreneurial Culture

This goal is focused on changing the mindset of residents of Franklin County, particularly its youth, and encouraging everyone to think about *creating their job* rather than *finding a job*. Realization of this goal will require a systematic change to build an entrepreneurial culture that will produce successful businesses in 15 to 20 years. The jobs that are created in Franklin County in the coming years will not come from a major 500-employee factory, but rather from small start-up businesses that are able to get the support and assistance they need to grow slowly but consistently. Based on the resources and expertise that already exist in Franklin County, many entrepreneurial opportunities will be focused around the relevant and emerging industry clusters.

This goal is all about creating the mechanisms and processes necessary to start creating those entrepreneurs and preparing them for the future. Partners that will be key to achieving this goal include the Chambers of Commerce, private companies/ entrepreneurs, school districts, secondary education providers, and others.

The Clarkson University Innovation Hot Spot program is another example of a potential partner for this goal. The Shipley Center at Clarkson University acts as the hub with the “Hot Spot” traveling to offices in Massena, Plattsburgh, Watertown, Ogdensburg, and Saranac Lake for one day per week.

From a press release announcing the funding:

*The focus of the North Country Hot Spot model is to identify, vet, and train entrepreneurs and innovators through existing programs to then be established in their communities of origin. These locations will deliver the message that the model is available and conduct idea capture.*

*Once captured, a feasibility analysis will be conducted at the Shipley Center to provide a go/no-go decision. If accepted, the entrepreneur will then be provided with a “commercialization caddy” to hold their hand through the commercialization process, bringing resources and services to them, as needed.<sup>2</sup>*

Strategies that have been identified to support this cluster include:

### TAP INDUSTRIES

Tap Industries is a locally grown company born out of what the co-owners saw as a need in the county for a materials recycling facility that receives, separates, and prepares recyclables. Tap Industries is able to take unwanted materials, such as plastics, and process and sell them to end-user manufacturers to reduce the amount of waste in landfills. The co-owners have grown this environmentally friendly business to 11 employees in Malone and are hoping to continue to expand to be able to accept and process agricultural plastics. They are located in Malone because of family connections, ease of doing business, and access to inputs and workforce.

<sup>2</sup> Shipley Center for Innovation Named Innovation Hot Spot by New York State Governor Andrew Cuomo. Release 12-20-2013. Accessed at: [http://www.clarkson.edu/news/2013/news-release\\_2013-12-20-2.html](http://www.clarkson.edu/news/2013/news-release_2013-12-20-2.html)



- Coordinate and host an entrepreneurship summit that brings people from all over the county and region together to talk about issues impacting entrepreneurship.
- Create a “Start Your Own” campaign to market the potential opportunities of entrepreneurship to younger residents and to demonstrate the possibilities associated with starting a business.
- Study the feasibility of establishing one or more entrepreneur incubator spaces to nurture development of new businesses throughout various sectors of the economy.
- Attract startups to Franklin County and nurture resident entrepreneurs through access to funding, space, and technical assistance.
- Provide resources necessary to stimulate entrepreneurial opportunities in agriculture, forestry, health care, tourism, and biotechnology clusters, among others.

## Goal 3

# Support Legacy Industries in Retention and Expansion

Based on the information analyzed during the CEDS process, it is evident that, while the economic climate is changing in Franklin County, there are a few clusters that remain relevant as a result of their historic importance in the county. These so called *legacy industries* should be supported through business retention and expansion efforts to allow the remaining companies to stay in Franklin County and transition with the times. The primary goals associated with these industries are related to finding ways to reduce costs and finding additional markets for goods and services.

Some of the partners that will be key to achieving this goal include the Industrial Development Agency, Cornell Cooperative Extension, an expanded Local Development Corporation, local and regional hospitals, and others.

### Agriculture and Value-Added Food Processing

Agriculture and Food Processing was identified as a relevant cluster because of its history and potential opportunities for the future resulting from changes in the industry including diversification, niche farming, and new technological advances that could make it more profitable for farmers. The agribusiness industry in Franklin County has benefited over the years from abundant land, quality soil, major employers, and income growth. Despite past growth and favorable future projections, this industry faces significant changes and challenges moving forward.

In addition to a trend towards automation and consolidation, consumers are demanding niche, hand-crafted, and locally-sourced agricultural products. These markets present an opportunity for small farms to continue to capture a portion of the agriculture market and fetch a high price for well-made goods.

Strategies that have been identified to support this cluster include:

- Establish an agriculture technical assistance position.
- Assist the agricultural industry in identifying and implementing solutions to issues impeding economic growth particularly in existing niche industries.
- Research the feasibility of a Food Hub with a commercial kitchen and greenhouses.
- Capitalize on changing legislation including the Farm Brewery bill and the permitted use and distribution of medical marijuana.

### Forestry and Wood Products

The Forestry and Wood Products Cluster in Franklin County shares many of the difficulties faced by this industry throughout the nation. The market for forestry products faces stiff competition from foreign imports and alternatives. The cluster is facing increasing costs of equipment, lack of processing facilities, and an aging workforce. Despite these weaknesses, the Forestry and Wood Products Cluster continues to be an important economic driver for Franklin County. One of the greatest opportunities for growth in this industry is the growing market for renewable biomass fuel, including wood pellet production.

Strategies that have been identified to support this cluster include:

- Find ways to manage costs associated with the forestry industry to help make the industry financially viable and sustainable for the long run. Focus on opportunities around niche industries in Franklin County.
- Identify and develop new markets for forestry products including high end furniture, biofuels, maple production, and others.
- Encourage the transition of major public buildings to biofuel for heat through cost/benefit studies and pilot projects.

## Health Care and Wellness

The Adirondacks and particularly Saranac Lake are well known for being at the forefront of health and wellness, including the founding of the Trudeau Sanitarium as the premier center for healing tuberculosis in the late 1800's. The Health Care and Wellness Cluster was identified as a relevant cluster because it is a major employer for the county and an area where growth is expected to continue as the population ages and health care reform policies are implemented. It is also important to note that the Health Care and Wellness Cluster is closely tied to both the Environmental and Biotechnology Cluster (research into infectious diseases continues at the Trudeau Institute) and the Tourism Cluster (wellness travel is a growing industry that Franklin County can capitalize on).

The cluster is facing obstacles related to changing health care regulations, aging population, and inability to find and keep qualified workforce. Strategies that have been identified to support this cluster include:

- Hold an annual health care industry summit.
- Support continued utilization and incorporation of cutting edge health care information technology systems throughout all levels of the system.
- Develop a training cost sharing model to increase the pool of needed health care workers.
- Consider attraction of a health care call center.

### ALICE HYDE MEDICAL CENTER

The Alice Hyde Medical Center is undergoing a \$35 million investment to establish a new assisted living facility in Malone. The new facility will offer residents of Franklin County an option that is not currently available with 135 nursing home beds and 30 assisted living beds.

In addition to this investment Alice Hyde continues to be on the cutting edge of the industry and has recently been recognized as one of the “most wired” hospitals in the United States.

## Goal 4

# Support the Emerging Environmental Science and Biotechnology Cluster

The Environmental Science and Biotechnology Cluster is a small slice of employment in Franklin County but it is a unique and emerging cluster that deserves recognition and support to help grow it further. For a small community, Franklin County boasts significant history in health care research and an array of impressive research and higher education institutions focused on environmental and scientific research. Paul Smith's College and Trudeau Institute are pillars of this industry cluster. By leveraging opportunities and trends in New York and the North Country, including growing interest in clean energy, energy efficiency, and environmental awareness, Franklin County can encourage the creation or expansion of firms focused on these emerging trends.

The goals and strategies associated with this cluster are designed to increase collaboration and transition research and development into commercialization. By focusing research and development on finding solutions to regional, national, and global environmental problems there is potential to create a true cluster that supports employment ranging from R&D all the way to manufacturing. Furthermore, by focusing on solving environmental issues, the supporters of this cluster will remain true to the Adirondack's values of environmental sustainability while at the same time supporting economic sustainability for residents. One of the goals is to create a natural environment research center which would go beyond the philosophical arguments and instead conduct research on how to create and improve on existing systems necessary to improve the environment, e.g., designing more effective sewer and waste treatment processes, etc.

Partners for this goal include the Trudeau Institute, the IDA, private industry, chambers of commerce, and the North Country Regional Economic Development Council.

Strategies that have been identified to support this cluster include:

- Establish an Environmental Science and Biotechnology Advisory Committee.
- Establish centers for excellence at the Trudeau Institute for Lyme and other tick-borne diseases and for Immuno-engineering.
- Establish a natural environment research center designed to forge partnerships and conduct research to find solutions for local and global environmental problems.
- Develop networking opportunities to nurture the cluster and combat issues related to attracting talent.

### TRUDEAU INSTITUTE

The Trudeau Institute in Saranac Lake was highlighted in Governor Cuomo's most recent State of the State address as an "emerging world-class biotech hub." To remain on the cutting edge of innovation, Trudeau has partnered with Clarkson University to spur innovation and commercialization of new biotechnology. In addition to its partnership with Clarkson, Trudeau is also partnering with Paul Smith's College to investigate the spread of Lyme disease in the North Country and beyond.

- Invest in workforce development initiatives based on career pathways to ensure the residents of Franklin County are prepared to work in the cluster's many different occupations.
- Look towards the existing industries in the county for collaboration opportunities such as with forestry and agriculture.

## Goal 5

# Enhance Tourism Opportunities Throughout the County

Tourism is a critically important industry for Franklin County and this goal and the related strategies have been designed to increase the amount of tourism opportunities in Franklin County. The county is well positioned to capitalize on the changing landscape of tourism and differentiate itself by creating the types of experiences that travelers are looking for. Franklin County has the ability to create once-in-a-lifetime outdoor recreation adventures, educational programs for families, four-season excursions for all levels, and a mix of everything in between. The biggest hurdle to enhancing the tourism industry in Franklin County is the lack of modern hotel rooms and services for visitors looking to stay in the county. This lack of hotel options results in shorter stays as people come for the day and end up staying in Lake Placid or elsewhere.

Following many years of discussion, the county is expecting that the development of the Adirondack Club and Resort will be built in Tupper Lake which will have a major impact on tourism throughout the year in Franklin County. County tourism businesses should be prepared to service these visitors who will be looking for a range of goods and services including restaurants, convenience stores, outdoor gear and recreation goods stores, and others.

Partners for this goal include the Tourism Advisory Committee and the Legislature.

Strategies that have been identified to support this cluster include:

- Support the completion of the Tourism Advisory Committee's Tourism Master Plan and incorporate any specific action items or strategies into the CEDS where appropriate.
- Pass legislation to establish an occupancy tax that will enable funds to support further development of the tourism industry.
- Support the upgrade of existing lodging and dining facilities and the building of new facilities.
- Develop year-round attractions throughout the county to enhance the tourism industry and reduce the seasonality of associated employment. Focus on opportunities around agri-tourism, cultural tourism, heritage tourism, adventure tourism and wellness tourism.

### HOLIDAY INN

The Monette family of Malone, owners of the Adirondack Energy company, have been investing in tourism infrastructure and amenities to support the growth of this industry in Franklin County. The Holiday Inn operated by the company adds a modern hotel to Franklin's lodging options. Many would have said that a new hotel was not needed in the area, but it continues to do well and supports overnight stays in Malone. This hotel, along with Mo's Pub & Grill, event space, and upgrades to the Malone Golf Club and Titus Mountain have enticed new tourists to visit the county.

## Action Plan Matrix

The following matrix outlines the individual strategies associated with each goal as well as some tasks that will guide the efforts necessary to complete the strategy. Each strategy includes suggestions related to partner organizations, priority level, and timeframe but since this is a living document it is expected that these will change over time as different parts of the plan are implemented.

The Action Plan Matrix identifies potential partner agencies, organizations, or groups that should be involved to assist with implementation. It should be noted that there may be other potential partners that are identified at a later date and they should be included in the process as well.

Goal 1: Improve Economic Development Climate and Implementation Capacity							
# 1	Strategy	Description	Actions	Lead Agency/Partner	Priority Level	Timeframe	Jobs Created
1.1	Establish an organization with additional capacity for county level economic development planning and implementation	The primary focus of this organization is to stay on top of changing legislation, implement the CEDS, conduct business retention and expansion efforts including visitation, maintain communication with all levels of government and partner organizations.	<p>Consider sustainable funding source alternatives including the County, a member campaign, and/or state authority via legislative action.</p> <p>Examine the need to establish a fundraising committee. Begin a fundraising and educational campaign throughout the public and private sector to explain the benefits of such an organization and why the funds are necessary.</p> <p>Establish a board of directors that is representative of the larger economy including members from all relevant clusters, workforce organizations, educational institutions, and others. The board will be tasked with keeping the projects on target, monitoring success, and directing the efforts of the organization.</p> <p>Consider what staffing will be necessary including executive directors, administrative assistants, and others. Examine what is necessary to increase economic development capacity in the county.</p> <p>Charge the EDO with implementing the CEDS plan and measuring its success. The CEDS document and action plan should be used to attract donors and the fundraising campaign should highlight the positive impact its implementation will have on the overall economy.</p>	IDA, Franklin County, CEDS Committee, EDO	Very High	Immediate	<5
1.2	Provide public officials with training and information related to economic development	Conduct public officials "orientation" on economic development practices and industry issues. Could include partnering with other nearby counties to help share costs and increase networking and idea sharing opportunities.	<p>Establish a contact list of all public officials and public employees who are involved with and/or interested in economic development issues. Update contact list regularly.</p> <p>Begin a regular series on different economic development topics. Invite experts from different fields to offer instruction followed by open discussion and question/answer. Topics to include economic and fiscal impact, site selection, changing legislation, financing, social media marketing techniques, etc. Could be done as a webinar or other online tool to allow for participation.</p> <p>Conduct periodic basic economic development training for public officials and stakeholders with a focus on ensuring that elected leaders understand local economic performance and tools available to improve the business climate and eliminate barriers to growth.</p> <p>Establish a listserv where information, changing legislation, articles, and trend pieces are forwarded to keep the public officials aware of changing economic development related issues.</p>	EDO, NCCC, NCREDC	High	Mid-Term	N/A



1.3	Enhance existing business retention, expansion, and attraction efforts	Retaining existing businesses in Franklin County is one of the most important tasks associated with economic development. Ensure that systems are in place to support existing businesses when they are in need and maintain communication to identify any red flags early.	<p>Implement a more formal and regular review of business' needs (workforce, financial, space, etc.) and their future plans through visitation efforts. Particular attention should be paid to legacy businesses to identify any red flags early. Begin with utilizing a basic Customer Relations Management (CRM) system and track all communication.</p> <p>Expand listing of available real estate on the Franklin County IDA website.</p> <p>Undergo a complete update of the Franklin County website. Continually update Franklin County website with current information for those looking to locate or expand in Franklin County. Include not only sites/properties but also available programs, incentives, infrastructure, and funding options.</p> <p>Host regular business community events with opportunities for networking and training. Training events could include inviting experts in various fields to train on internet sales, business planning, workforce issues, customer service, social media marketing techniques, and other business issues. Portion of the event should be purely for networking to help intra-county collaborations and partnerships develop.</p> <p>Participate in regional and state efforts to attract and partner with non-US firms. Work to identify opportunities for cross-boarder trading, attraction of non-US businesses, and making exporting easier for Franklin County businesses.</p>	IDA/LDC, EDO, NCREDC	High	Ongoing	Retention based
1.4	Review all infrastructure for necessary improvements and upgrades	Improve access to markets and interconnectivity.	<p>Engage the regional DOT to understand their future plans for transportation infrastructure investment and where possible, provide input on the recognized needs of Franklin County.</p> <p>Conduct a full analysis of rail potential in Franklin County including the need to establish a 3 track spur off of the rail line in Bombay.</p> <p>Research and support the development of alternative energy development production facilities including wind, biomass, and solar power. Find ways to work with local higher education and research centers to identify solutions and alternatives.</p> <p>Continue development of natural gas from the main line to Chateaugay.</p> <p>Maintain inventory of water, sewer, utilities, and other for all potential development sites and have available for site selectors. Ensure capacity is sufficient for future plans.</p> <p>Focus development and upgrades in the southern part of the county including at the Harrietstown Business Park and Tupper Lake Business Park.</p> <p>Upgrade airport at Lake Clear including increasing connectivity and establishing a transit hub to move people from the airport to other areas of Franklin County.</p> <p>Find ways to improve the appearance of Franklin County for first time visitors to the area who may be considering relocating their family or business.</p> <p>Invest in infrastructure to improve cell and broadband access throughout the county. Work to become the most wired county in the North Country.</p>	Higher education, Private Industry, DOT, NYSERDA, IDA, EDO	High	Short-Term	+1,000 construction

1.5	Host an event for teachers, guidance counselors and parents highlighting a wide range of career opportunities for their children	Provide information and opportunities for students and residents in Franklin County to learn about the many traditional and non-traditional career possibilities after high school. Shift focus toward finding jobs to pursue rather than degrees to pursue.	<p>Work with the school districts to identify the best time for this type of event. Market and promote the event throughout the county. Invite private industry to make presentations and highlight available positions.</p> <p>Develop a county-wide career day that provides students (grades 7+) and their parents information about different types of careers, income potential, educational requirements, educational pathways for achieving their goals and other information. Focus on careers that are available in Franklin County.</p> <p>Encourage open communication between employers, teachers, and guidance counselors regarding available jobs, educational demands, and on-the-job training opportunities. Create opportunities for mentorships, internships, and apprenticeships throughout the county in various industries. Facilitate meetings between teachers and employers in different industries to help them become familiar with what types of skills/education are necessary for different occupations and industries.</p>	School Districts, Chamber of Commerce, SBDC, Higher Education, BOCES	Medium	Mid-Term	N/A
1.6	Conduct a full workforce analysis	To retain existing businesses in relevant industry clusters and support Franklin County's economy, workforce and economic development needs to be better aligned.	<p>Review what has been done to date on the issue by other organizations.</p> <p>If additional analysis needs to be conducted, issue an RFP for a full workforce analysis to align workforce training and industry needs.</p> <p>Implement findings of the workforce analysis as applicable. Strategies identified in the analysis may include creating new programs, making connections between employers and workforce education systems, and other strategies to better align the workforce with the employer needs.</p>	Workforce Investment Board, Workforce Development Institute, NCREDC HEARD Consortium	Medium	Long-Term	Workforce based
1.7	Develop networking opportunities to nurture the county's economy and combat issues related to attracting talent	Networking opportunities would support a "community" atmosphere, assist with trailing spouses issue, develop sense of the job and growth opportunities in Franklin County.	<p>Create a Young Professionals group and host regular events throughout the county.</p> <p>Create a profile of the types of occupations that require the recruitment of professionals from outside the area and target an outreach campaign to professional organizations about the benefits of the North Country and the employment opportunities.</p> <p>Maintain listing of companies in Franklin County and make this information easily accessible to job applicants and trailing spouses considering relocating in Franklin County.</p> <p>Create a "welcoming committee" made up of professionals that live in Franklin County who are available to talk with prospective applicants and discuss issues or concerns they may have. Welcoming committee should not be trying to "sell" Franklin County, but rather tell the truth about living in a rural area to ensure that people who end up relocating to the county for a job are happy and want to stay for a long time. Partner with regional staffing agencies and professional organizations who may be the first contact for those considering relocation.</p>	EDO, Chamber of Commerce, Higher Education	Medium	Mid-Term	Workforce based
1.8	Establish a Technology and Manufacturing Committee	To help further the technology and manufacturing in the county.	The committee should be tasked with working with the manufacturing sector and beyond to identify opportunities for innovation and collaboration around new technology.	EDO	Low	Mid-Term	N/A

Goal 2: Promote An Entrepreneurial Culture							
#2	Strategy	Description	Actions	Lead Agency/Partner	Priority Level	Timeframe	Jobs Created
2.1	Coordinate and host an entrepreneurship summit	Invite entrepreneurs, educational institutions, economic development professionals, students, business owners, and other interested participants to discuss the issues, needs, and opportunities for entrepreneurial activity in Franklin County.	<p>Begin a list of people who should be invited and informed about the event, be sure to include representatives from all relevant clusters, public and private institutions, and most importantly entrepreneurs. Identify who within the entrepreneur community could act as the leader and take charge of the event and overall effort.</p> <p>Consider where to hold the event such as the Hotel Saranac with opportunities for large group discussions, break out sessions, and networking events.</p> <p>Program the event with the intent of allowing the entrepreneurs to lead the effort with support from other organizations. Outcome of the event should be a strategy for developing the entrepreneurial climate in Franklin County. After the event follow up with annual or bi-annual events to allow for continued conversation and collaboration.</p>	EDO, IDA, Chamber of Commerce, Private Companies, Higher Education, Clarkson University Innovation Hot Spot	Very High	Short-Term	N/A
2.2	Attract startups to Franklin County and nurture resident entrepreneurs	Encourage the development of start-ups in Franklin County through access to capital, inventory of space, and overall positive entrepreneurial climate.	<p>Improve access to capital for entrepreneurs including grants, low interest loans, a revolving loan fund, venture capital, crowd funding, and other. Research existing and active venture capital networks in Albany and/or Burlington and maintain information to make available as necessary for entrepreneurs. Research potential for turning revolving loan fund into a grant for targeted industries/targeted geographies with specific thresholds and claw back regulations.</p> <p>Maintain an inventory of low-cost space that would be attractive to entrepreneurs and small business start-ups. Market available space and incentives to entrepreneurs working from home, start-ups, and professors at Paul Smiths and other local and regional schools.</p> <p>Establish a formalized SCORE (Service Corps of Retired Executives) to provide mentoring to younger entrepreneurs.</p> <p>Support startup weekends, small business tours, networking events, and pitch competitions (like a local Shark Tank) throughout the County. Regular networking events could rotate around the county.</p>	IDA, EDO, Chamber of Commerce, NYS ESD, Clarkson University Innovation Hot Spot	High	Ongoing	25

2.3	Create a "Start Your Own" campaign	Design a campaign to encourage entrepreneurship throughout all ages and sectors.	<p>Develop marketing material for the campaign including logo, tagline, online materials, newsletters, apps, and other material to spread the word. Use newsletter to highlight success stories, providing information about available assistance, and introducing people to the idea that they can start their own business at any age. Develop and market youth entrepreneurship programs.</p> <p>Inventory all the entrepreneurs and start-up businesses that would be interested in participating in the effort. Develop a small business tour to highlight entrepreneurs, start ups, and successful businesses in the region to students.</p> <p>Hold regular Entrepreneur Speaker Series around the county that demonstrate what success looks like in Franklin County. Create a questionnaire to help determine what types of topics would be interesting for participants.</p> <p>Determine if an entrepreneurial class is available at the high school level. If not, work with the school districts to establish one.</p> <p>Establish entrepreneurship clubs throughout the educational system ranging from elementary school through secondary education. Partner with North Country Community College, Paul Smiths, non-profits, and schools to create after school and summer youth class to inspire entrepreneurship and creative thinking. Connect with Future Business Leaders of America to identify ways to incorporate some of their existing entrepreneurship programs. If the clubs are successful consider doing an entrepreneur/business summer camp.</p> <p>Set up a business plan contest for all ages. The contest could have different levels from young (K-12), young adult (colleges in the North Country region), and adult with a range of prizes. Have local entrepreneurs and successful business owners work with the winners and provide feedback throughout the process.</p>	Entrepreneurs, School Districts, Higher Education, Chamber of Commerce, Clarkson University Innovation Hot Spot	Medium	Short-Term	Workforce based
2.4	Study the feasibility of establishing one or more entrepreneur incubator spaces	A well run incubator/accelerator space with equipment and infrastructure could meet the needs of the emerging and legacy industries and support overall business development.	<p>Use inventory of available space to identify potential locations. Should be located in an appropriate space depending on the type of clients expected to attract. Look for areas with easy access to water/sewer infrastructure, utilities, and easy transportation options. Consider the use of a vacant storefront to help increase visibility.</p> <p>Start a list of potential tenants and listen to what they would need, how much they can spend, and other information that can be gleaned about the market potential.</p> <p>Once a location and adequate demand are identified, conduct a full financial feasibility study to look at the potential costs and expenses of establishing an incubator. Consider alternative financing, different rental arrangements, and other options as necessary.</p>	EDO, IDA/LDC, Clarkson University Innovation Hot Spot	Medium	Short-Term	10

Goal 3: Support Legacy Industries in Retention and Expansion							
#3	Strategy	Description	Actions	Lead Agency/Partner	Priority Level	Timeframe	Jobs Created
<b>3.1 Agriculture and Food Processing</b>							
3.11	Research the feasibility of a Food Hub with commercial kitchen and greenhouses	A Food Hub has the potential to extend the growing season and increase the variety of value-added products in Franklin County.	<p>Create a Agriculture and Food Processing Committee tasked with identifying potential location, end users and equipment/facility needs. Develop a mission and vision for the facility in coordination with the eventual end users.</p> <p>Once a space and potential users have been established start to identify funding sources and test the financial feasibility of such a facility. If the project is deemed to be financially viable begin to approach funding sources, other organizations, and institutions for assistance with implementation and operation.</p> <p>In addition to providing space and equipment, offer users of the Food Hub access to technical assistance, training, networking, and other services to help them be successful.</p>	Food Hub subcommittee, Farm Bureau, NYSDAM, USDA, IDA, FCSWCD	High	Short-Term	15
3.12	Establish an agriculture technical assistance position	The position should be designed to help farmers and those throughout the supply chain make connections, break into new markets, comply with regulations, and overall assist with needs.	<p>Identify funding sources for the position including USDA and other grant programs.</p> <p>The position should be charged with assisting the farmers with making connections with resorts, hotels and institutions (universities, hospitals, schools) to encourage them to buy local foods and buy directly.</p> <p>The position will be responsible for staying up to date on all regulations, researching new products/changes in demand, working with farmers to transition towards different products and other efforts to improve economic viability.</p> <p>Provide farmers with technical and financial support towards implementation of Best Management Practices to help existing farmers and producers be more efficient and effective and meet all regulations.</p>	CCE, Ag Committee	High	Mid-Term	1 direct position plus indeterminate amount in farming industry
3.13	Assist agricultural industry in identifying and implementing solutions to issues impeding economic growth	Collaboration and finding solutions to problems facing the agriculture industry in Franklin County will allow for increased viability of the industry.	<p>Establish low cost financing options specifically for agriculture and food processing companies.</p> <p>Host regular meetings of those in the agriculture industry (throughout the supply chain) to encourage discussion around major issues and opportunities.</p> <p>Consider ways to encourage partnerships and group buying of materials and equipment to reduce costs.</p> <p>Using information gathered from the workforce strategy and information from the farmers, find ways to address issues identified related to agriculture. Develop appropriate workforce programs and work with the community college to implement.</p> <p>Consider implementation of an online farmers market and delivery system to offer goods throughout the county. Contact people who run similar organizations elsewhere and get feedback on the service they use, how it works, how much the website costs, what they would change, etc.</p> <p>Work with producers to help them make connections with partners in large population centers throughout the northeast.</p> <p>Establish and promote a "locally grown" initiative to support existing and future producers sell their products locally. Highlight health benefits, social benefits, and economic benefits of eating locally produced goods. Train producers in customer service and how to create repeat customers.</p>	CCE, Local farmers, Ag technical assistance position, NYSDAM	Medium	Mid-Term	Indeterminate

3.14	Capitalize on changes in legislation	Recent legislative changes have created opportunities for those in the farming industry to diversify their products.	<p>Provide training and resources to help farmers stay up to date with changing legislation and transition their production to meet changing trends and requirements.</p> <p>Work with the Cornell Cooperative Extension to assist farmers with production of inputs for the craft beer industry to fill the increasing demands associated with the Farm Brewery Bill. Work to help farmers make the connections with each other and with brewers. Consider bulk purchasing, co-ops, and other techniques to reduce the cost of the transition and increase profitability.</p> <p>Research potential for the production and sale of medical marijuana in Franklin County. Begin communication with key companies and identify workforce, site selection, utility, and incentive needs and see if there is potential for Franklin County to host a medical marijuana processing facility.</p>	CCE, Ag technical assistance position, Paul Smith's	Medium	Short-Term and Ongoing	50
<b>3.2 Forestry and Wood Products</b>							
3.21	Manage costs associated with the forestry industry	One of the biggest challenges for those in the forestry industry is the high cost of equipment which has led to the outsourcing of material processing. Bringing processing back into Franklin County would have a positive impact on the cluster and the county.	<p>Create a Forestry and Wood Products Committee tasked with assisting with the implementation of this plan and coordinating with other committees and agencies.</p> <p>Develop a list of the forestry companies that are interested in participating in a collaborative and what kind of equipment they have and what they need. Update this list regularly and begin to work to identify opportunities for shared financing, cooperative use, and purchasing agreements.</p> <p>Review the tax law associated with land under forest management, consider ways to revise the law to make it more viable to maintain land for this purpose.</p> <p>Reach out to companies in Canada who may be looking to open processing operations in Franklin County and work with them to identify financing and workforce solutions as necessary. Consider direct marketing and other attraction efforts using minimal resources.</p>	EDO	Medium	Short-Term	N/A
3.22	Identify and develop new markets for forestry products	Identifying new markets can offer opportunities for existing forestry and wood products companies to diversify.	<p>Promote use of wood biofuel, identify funding opportunities to purchase equipment to ease the transition, and support the reopening of ReEnergy plant in Chateaugay.</p> <p>Assist with online retailing and short term co-operative leases during the holidays to get the high end products out to consumers.</p> <p>Make connections between maple producers and landowners and assist with cooperative agreements.</p>	EDO, CCE	Medium	Short-Term	15
3.23	Encourage the transition of major public buildings to biofuel for heat	One opportunity for the forestry industry is to transition to making biofuels.	<p>Communicate with major energy users in the county and begin conversation about whether it would be feasible to transition to alternative fuels. Engage the forestry industry to discuss options for bulk buying and/or processing. Assist with the completion of a cost/benefit analysis.</p> <p>Work with the natural science research center (Task 4.4) to see if there are options for collaboration related to energy production for larger users in the county. Identify potential opportunities for test projects or pilot projects.</p>	EDO, NYSERDA, Paul Smith's, CCE	Medium	Mid-Term	15

3.3 Health Care and Wellness							
3.31	Hold an annual regional health care industry summit	Bring together people from all areas of the health care and wellness industry to discuss issues and work together to find solutions.	Identify a committee to be in charge of hosting the event to bring together different aspects of the health care community. Committee should first inventory similar existing events that take place in Franklin County and identify what may be missing in terms of information dissemination and collaboration opportunities. Include a range of programming for all aspects of the system ranging from workforce, job placement, innovation, wellness and prevention. The summit should be designed to help the providers with collaboration efforts and also highlight available employment positions.	Hospitals and health care organizations	High	Mid-Term	N/A
3.32	Continue to utilize technology to improve the health care system	Support continued utilization and incorporation of cutting edge health care information technology systems throughout all levels of the system	Support continued regional investment in infrastructure needs as identified by the health care providers including assisting with finding funding. Participate in regional efforts to upgrade the health care system and provide cutting edge services to patients through the use of technology and innovative techniques.	Hospitals, NCREDC, IDA	High	Ongoing	Retention based
3.33	Develop a training cost sharing model to increase the pool of needed health care workers	Access to qualified workforce was identified as a challenge for the rural health care providers in Franklin County. Training programs will help increase the available labor pool.	Identify local and regional health care providers who would be interested in collaborating on training efforts. Work with the NCCC and other training institutions to develop appropriate coursework. Facilitate regular training courses and review of necessary adjustments as the industry changes. Highlight program successes, encourage participation in job shadowing throughout high schools, market the program and the opportunities in the health care industry in Franklin County. Consider establishing additional New Visions programs that focus on other health care occupations to help establish a prepared workforce.	Hospitals and health care organizations, WDI, WIB, NCCC	Medium	Mid-Term	20
3.34	Health care call centers	Consider development of health care call centers in Franklin County	Research the potential to attract a Health Care Call Center to Franklin County or expansion of the Franklin County CARES system. A health care call center is an organization that provides triage and health information services to the public via telephone, website, or other electronic means. Many health plans, hospitals, and physicians' offices use call centers to guide patients to appropriate settings to seek care.	IDA, EDO, NCREDC	Medium	Mid-Term	200

Goal 4: Support the Emerging Environmental Science and Biotechnology Cluster							
#4	Strategy	Description	Actions	Lead Agency/Partner	Priority Level	Timeframe	Jobs Created
4.1	Establish an Environmental Science and Biotechnology Advisory Committee	The Advisory Committee should be charged with guiding the collaboration and growth of the environmental science and biotech clusters in Franklin County with a focus on facilitating collaboration with other environmental and biotechnical clusters in northern NY.	<p>Convene representatives from companies, research institutions, education (all levels), and public officials to determine participation and interest and then begin meeting regularly. Initiative can begin informally to explore needs and opportunities. Market and promote the work being done at the meetings to create public awareness.</p> <p>Review policies and processes associated with moving from research and development to commercialization. Ensure information is available for entrepreneurs and businesses about patent laws, intellectual property, and other legal issues surrounding transitioning from research to a business.</p> <p>Advisory Committee should meet with businesses in the cluster to find out about their issues and help them find opportunities for collaboration.</p> <p>Consider cross-border collaboration opportunities and working with Canadian organizations to help further environmental research in North America.</p>	EDO, Private Industry, Higher Education, The Wild Center, VIC	Very High	Short-Term	N/A
4.2	Establish a Center of Excellence for Lyme and other Tick-borne Diseases at the Trudeau Institute	Establish cross-disciplinary and cross-institutional cooperation, attract a diverse group of scientists to the area, establish partnerships with NYS Dept. of Health and other stakeholders	Follow the lead of the Trudeau Institute and provide support as necessary and applicable. Assist with marketing and promotion, financing, partnership development, and communication of successes. Meet regularly with Trudeau Institute to determine what needs they have and how to assist.	The Trudeau Institute	High	Short-Term	15
4.3	Establish a Center of Excellence for Immunoengineering at the Trudeau Institute	Attract national and regional private business, commercial, and educational partners to the Center	Follow the lead of the Trudeau Institute and provide support as necessary and applicable. Assist with marketing and promotion, financing, partnership development, and communication of successes. Meet regularly with Trudeau Institute to determine what needs they have and how to assist.	The Trudeau Institute	High	Short-Term	15
4.4	Establish a natural environment research center	The research center should be designed to forge partnerships and conduct research to find solutions for specific environmental problems being faced locally and globally.	<p>Conduct feasibility assessment for establishing a research center. It must be determined if there is a need and willingness for joint use and investment in such a facility by higher education and research institutions. Initially, this facility may be part of an already existing lab or institution located in the Saranac Lake region.</p> <p>Submit the plan to the NCREDC for inclusion in the next strategic plan. Work to develop a partnership with NYS, regional colleges and universities, private industry and local and state government.</p> <p>Once center is up and running make sure to publicize and promote all the work being done. Invite public officials, researchers, media outlets, and others to participate in major events and announcements.</p> <p>Center should be focused on identifying solutions to environmental issues being faced in either the natural environment (water quality, invasive species, waste and water treatment, etc.) or by existing industries in the county such as forestry and agriculture. Work on finding opportunities for collaboration and partnerships.</p> <p>Staff at the center should be informed about all legal issues around intellectual property and commercialization of products. This may be achieved with support of experienced partners such as Clarkson University, as an example.</p>	EDO, IDA, Paul Smith's, Adirondack Watershed Institute, The Wild Center, NCREDC	Medium	Mid-Term	20



4.5	Invest in workforce development initiatives based on career pathways geared towards positions related to the cluster	Curriculum should be geared towards problem solving and solutions for local and regional issues.	Develop a county-wide curriculum for K-12 that teaches environmental science and biotechnology. Include early education around sciences all the way to internships and job shadowing opportunities for older students. Incorporate site visits, field trips, presentations from local business owners in the field and researchers.	School Districts, Private Industry, FEH BOCES, EDO, NCREDC HEARD Consortium	High	Mid-Term	Workforce based
			Develop after school clubs/programs and focused educational paths for students who are interested, similar to a New Visions BOCES program.				
			Create an annual competition around finding a solution to a particular environmental problem. Invite groups from all over the country to submit and offer rewards and prizes for the best projects.				
			Host an annual Envirothon which is an event that educates high school students in natural resource and environmental sciences. The program emphasizes the importance of environmental sensitivity while stressing a need to achieve a social, ecologic and economic balance.				
			Support existing secondary education programs in local and regional education institutions and develop new ones as needed to support cluster. Work with local businesses to determine workforce needs.				

Goal 5: Enhance Tourism Opportunities Throughout the County							
#5	Strategy	Description	Actions	Lead Agency/Partner	Priority Level	Timeframe	Jobs Created
5.1	Support the completion of the Tourism Advisory Committee's Destination Master Plan	Assist as necessary with the completion of the county Tourism Destination Master Plan.	Assist with data collection and outreach (including the visitor survey) as necessary to complete the master plan. Update the CEDS as necessary to include goals/strategies identified through that planning process. Assist the TAC with implementation of the goals/strategies identified as applicable.	TAC, CEDS Steering Committee	Very High	Ongoing	N/A
5.2	Pass legislation to establish an occupancy tax	Use funds to support economic development and tourism development. The occupancy tax is supported locally and has been identified as critical to the future of Franklin County.	Create an educational program around how the additional revenue would be used, examples of other counties that have recently enacted it and how it has impacted their visitation. Spread this information throughout the county and encourage people to contact their representatives. Meet and discuss the tax with state legislators and identify the issues.	TAC, Legislature	High	Short-Term	N/A
5.3	Support the upgrade of existing and building of new lodging and dining options	Increase access to lodging and dining opportunities to enhance the visitor experience.	Include lodging as a target for available funding and financing opportunities. Support the improvement of existing facilities and building new. Support the Adirondack Club and Resort, Flanagan Hotel, and other major hospitality industry investments. Work to identify potential locations for new hotels or restaurants and market the potential to developers.	TAC	High	Ongoing	150
5.4	Develop Franklin County as a year-round tourism destination	Finding ways to bring more people into the county throughout the year will support the tourism industry and reduce the seasonality of the associated employment.	Support development of craft alcohol production and a regional wine, beer, and spirits "trail". Trail should highlight local food and new culinary opportunities throughout the county. Make connections with communities in other parts of the country that are implementing year-round strategies at their ski mountains and other recreational facilities. Work with regional organizations to develop multi-use trails across the county including motorized uses. Develop cross-promotional opportunities with St. Regis Reservation, especially leveraging the reservation's focus on cultural tourism Support recreational opportunities in DEC Unit Management Plans for conservation easement lands to benefit adjacent communities. Encourage the DEC Unit Management Plan for the Remsen-Lake Placid Corridor to move forward in a way that will maximize the economic and fiscal impact benefit to Franklin County. Market the experiences of Franklin County to niche tourism markets, including active senior tourists, wellness tourism, outdoor/adventure tourism, and agritourism. Sell the story and unique experiences that are available in Franklin County that are not available anywhere else. Incorporate farms, including agritours, farm tours, hands on and educational activities; wildlife education opportunities and nature tours; market wellness history of Franklin County and opportunities for local wholesome foods and outdoor activities, develop niche-focused messaging tourism-related businesses can use. Encourage customer service training programs to help businesses differentiate themselves and offer a higher standard of service that will create life-long visitors. Research feasibility of a regional destination youth sports facility. Youth athletics and associated training and travel has grown significantly. A quality facility may attract travel clubs from throughout northern NY and Canada to compete in Franklin County.	TAC	High	Ongoing	Indeterminate



## Attachment A – Economic Base Analysis



# CEDS Economic Base Analysis

*for*


## Franklin County

August 26, 2014

Prepared By:



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## EXECUTIVE SUMMARY

As part of the Franklin County Comprehensive Economic Development Strategy, one of the primary steps was to gather and analyze data related to historic and current demographic and economic trends. This document is intended to provide background data on the Franklin County economy and compare the county to the North Country and Upstate NY. This is one set of data that will be used to develop specific strategies for Franklin County's economy. The following is a summary of the major findings of the analysis with more detail in the full report.

### *Demographic Analysis*

- Population of Franklin County is projected to remain steady over the next five years and gain approximately 500 new residents (+1%).
- Income levels in Franklin County are \$24,000 less than the rest of New York State (excluding New York City and Long Island) at \$52,000 and \$76,000, respectively.
- The median age in Franklin County is nearly 40 which is higher than the rest of the North Country but lower than the rest of Upstate NY. The lower age in the North Country could be related to the Fort Drum military base in Watertown.
- A smaller portion of residents of the county have achieved higher levels of education compared to the rest of New York State. Specifically, only 17% have a bachelor's degree or higher in Franklin County compared to 30% for the rest of the state.
- 55% of Franklin County residents have a high school degree or less as their highest form of education, compared to 42% in the rest of the state. This is important to understand when considering the type of jobs that can be filled and the educational needs of residents in order to prepare them for employment.
- The unemployment rate in Franklin County is higher than the average for NYS, but the rate of unemployment has been declining since the annual average high of 9.5% in 2012. April 2014's unemployment rate was only 7.5% for Franklin County which is the lowest it has been since 2008.

### *Economic Base Analysis*

- The Franklin County economy is dominated by Government, Health Care and Social Services, and Retail Trade. These are industries that tend to serve the immediate community rather than attract wealth or export goods.
- Overall the county has seen 7% growth in employment since 2003, with that growth being driven by the Health Care and Social Assistance industry (particularly hospitals, mental health facilities, and other health practitioners) and the Administrative and Support and Waste Management and Remediation Services industry<sup>1</sup>.
- Employment in Franklin County is projected to continue to grow through 2023 by 11% or 2,500 jobs. This rate of growth is faster than the North Country (8% projected growth) and Upstate NY

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<sup>1</sup> The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services. (Source: [www.census.gov](http://www.census.gov))

(10% projected growth). The faster than average growth in Franklin County is a positive sign and one that indicates that there are opportunities for Franklin County to direct that growth and continue the momentum of the last 10 years.

- Industries related to real estate are projected to grow in all three geographies including Lessors of Real Estate, Services to Buildings and Dwellings, and Activities Related to Real Estate. These industries also saw growth between 2003 and 2013.
- The Construction industry saw a decline in employment between 2003 and 2013 but it is projected to have a slight comeback through 2023. The decline between 2003 and 2013 is likely related to the Great Recession and the massive downturn in construction related activities during that time.
- Compared to the national average, Franklin County has a very high concentration of employment in the Agriculture, Forestry, and Fishing industry (7.81).
- The most concentrated industries in Franklin County are agriculture and forestry related including Support Activities for Forestry; Logging; Animal Production; Sawmills and Wood Preservation; Support Activities for Crop Production; and Dairy Production Manufacturing. Agriculture and related activities are very important to Franklin County and drives a large part of the economy. Additional research into the Agriculture economy will be conducted as part of the targeted industry analysis.
- At the 5-digit level, the largest occupation in Franklin County are employees classified as Correctional Officers and Jailers. Employees in this occupation earn approximately \$57,000 each year which is higher than the average earnings for the county of \$49,400. However, New York State has been actively identifying correctional facilities to be closed due to a declining prison population. Recent correctional facility closures in Franklin County include Camp Gabriels Correctional Facility in 2010 and Chateaugay Correctional Facility which is expected to close in July 2014. The Chateaugay facility closing will result in 111 jobs lost for Franklin County (however some of the employees will be transferred to other facilities in New York State). While the loss of those jobs is devastating for the community, this CEDS process can be an opportunity to identify reuse potential for the site(s).
- Very few of the top occupations in Franklin County require more than a high school diploma or GED. The few that require more include: Registered Nurses, Teacher Assistants, Postsecondary Teachers, and Elementary School Teachers. This suggests that residents who grow up in Franklin County and get a higher education may find it difficult to stay in the county for work.
- The previous Comprehensive Economic Development Strategy for Franklin County identified three targeted industries including (1) Agriculture<sup>2</sup>, (2) Logging and Forestry, and (3) Tourism. The economic base analysis supports these three industries as possible targeted sectors and warrants additional research into their characteristics, potential opportunities, and issues/constraints. Some additional targeted clusters may be identified through the interviews and additional research conducted as part of the strategic planning process. Potential targeted clusters may include Health Care and Social Assistance and Value Added Food Manufacturing.

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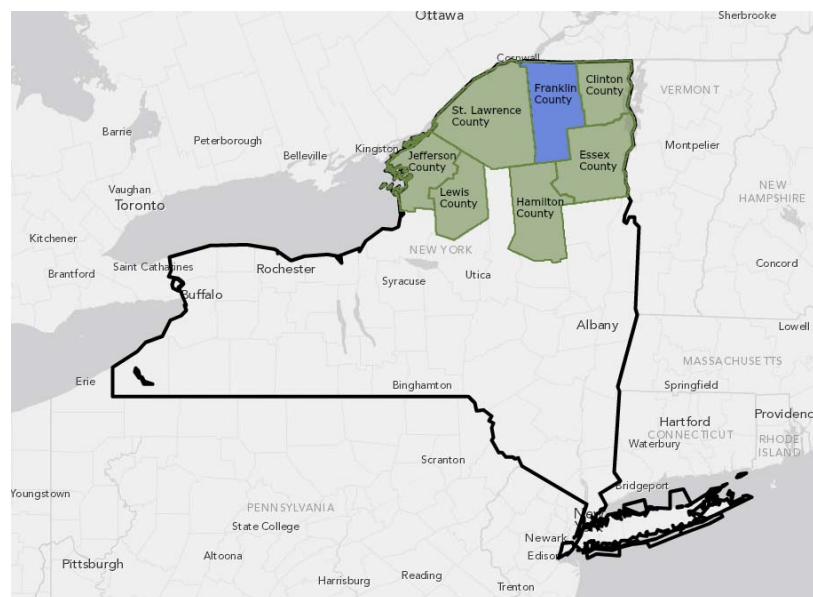
<sup>2</sup> The data source used for this initial economic base analysis, EMSI, typically undercounts actual employment in agriculture. As part of the targeted industry analysis, Camoin Associates will utilize the recently released 2012 US Census of Agriculture to better define current employment in agriculture in Franklin County.

## INTRODUCTION

As part of the initial research for the Franklin County Comprehensive Economic Development Strategy, Camoin Associates gathered data to fully understand the existing conditions in the county in terms of demographics and the economic base. This information is used to inform the subsequent steps of the analysis including identifying the targeted clusters, potential economic development initiatives, and opportunities for economic growth. The following report includes a socioeconomic characterization and an economic base analysis.

### *Geographies Studied*

This data analysis was conducted to identify existing conditions and trends within industry sectors that make up the local and regional economy. Data was collected for three geographies including Franklin County (shown below in blue), the North Country (shown in green plus blue includes: Franklin, Clinton, Essex, Hamilton, St. Lawrence, Jefferson, and Lewis Counties) and Upstate New York (includes all of NYS except the 5 boroughs of NYC and Long Island). Typically the analysis would compare Franklin County and the North Country to all of the state, but since NYC and Long Island are so different from the rest of the state, those counties were excluded.



### *Data Sources*

Much of the data in this report were purchased from ESRI Business Analyst Online (ESRI) and Economic Modeling Specialists Intl. (EMSI). ESRI's base data is the 2000 and 2010 Census. It uses proprietary statistical models and updated data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to project current statistics and future trends. ESRI data is often used for economic development, marketing, site selection, and strategic decision making. For more information, visit [www.esri.com](http://www.esri.com).

EMSI data are compiled from several sources, including the U.S. Census Bureau and U.S. Departments of Health and Labor using specialized proprietary processes and models to estimate current statistics and predict future trends. Visit [www.economicmodeling.com](http://www.economicmodeling.com) for additional information.



## DEMOGRAPHIC ANALYSIS

### Introduction

As part of the CEDS process, it is important to understand the current socioeconomic conditions in the county in order to identify challenges and opportunities for future economic development initiatives. The following section highlights some important socioeconomic characteristics of Franklin County.

### Socioeconomic Indicators

According to estimates by the U.S. Census Bureau, Franklin County’s population is 52,257<sup>3</sup>. Based on historic population growth trends, it is projected that the population will stay relatively stable over the next 5 years and grow by approximately 550 people or 1%. There are approximately 19,400 households and 12,258 families<sup>4</sup> in the county. The median age is 39.6 and is expected to increase to 40.1 by 2018.

Franklin County and the North Country are both projected to increase in population by more than 1% over the next five years, compared to the Upstate NY geography (all of New York State except for NYC and Long Island) which is projected to grow by only 0.65% over this term.

Demographic Indicators				
Franklin County	2013	2018	# Change	% Change
Population	52,257	52,804	547	1.05%
Households	19,399	19,750	351	1.81%
Families	12,258	12,398	140	1.14%
Median Age	39.6	40.1	0.50	1.26%
North Country	2013	2018	# Change	% Change
Population	437,746	445,582	7,836	1.79%
Households	167,429	171,418	3,989	2.38%
Families	108,362	110,359	1,997	1.84%
Median Age	38.0	38.6	0.60	1.58%
Upstate NY	2013	2018	# Change	% Change
Population	8,401,248	8,455,461	54,213	0.65%
Households	3,281,786	3,315,990	34,204	1.04%
Families	2,098,191	2,107,336	9,145	0.44%
Median Age	40.4	40.9	0.50	1.24%

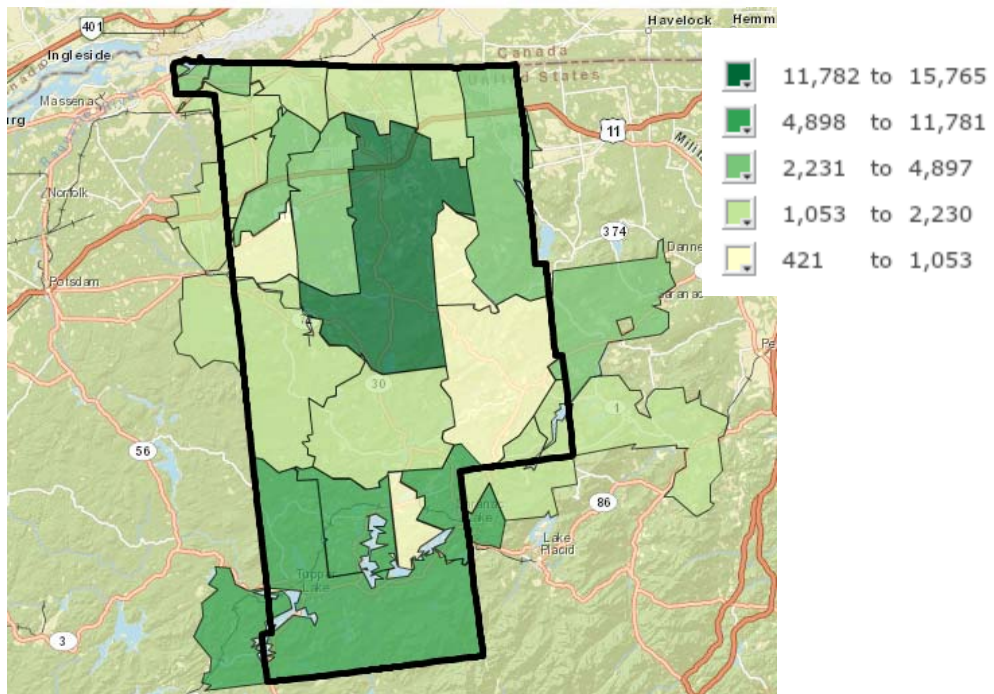
Source: ESRI Business Analyst Online

The most densely populated zip code includes the Town and Village of Malone. The southern portion of the county is also more densely populated than the rest of Franklin County and includes the population center of Saranac Lake.

<sup>3</sup> Includes approximately 6,400 individuals living in “Group Quarters.” This includes people living in prisons and on college campuses

<sup>4</sup> Household and family figures do not include “Group Quarters”

## Population Distribution by Zip Code



Information related to income levels can serve as powerful indicators of an area’s economic climate. The median household income<sup>5</sup> in Franklin County is \$39,352.<sup>6</sup> The average household income<sup>7</sup> is over \$12,000 greater than the median at \$52,226. Per capita income<sup>8</sup> is just under \$20,000. By 2018, all income indicators in the county are expected to increase by around 10%. Compared to the rest of the North Country and Upstate NY, the county’s income levels are low and anticipated to grow more slowly.

Economic Indicators				
Franklin County	2013	2018	# Change	% Change
Median Household Income	\$ 39,352	\$ 43,514	\$ 4,162	10.58%
Average Household Income	\$ 52,226	\$ 57,347	\$ 5,121	9.81%
Per Capita Income	\$ 19,989	\$ 22,045	\$ 2,056	10.29%
North Country	2013	2018	# Change	% Change
Median Household Income	\$ 43,693	\$ 48,615	\$ 4,922	11.26%
Average Household Income	\$ 56,273	\$ 61,516	\$ 5,243	9.32%
Per Capita Income	\$ 21,901	\$ 24,036	\$ 2,135	9.75%
Upstate NY	2013	2018	# Change	% Change
Median Household Income	\$ 53,681	\$ 61,591	\$ 7,910	14.74%
Average Household Income	\$ 76,240	\$ 88,475	\$ 12,235	16.05%
Per Capita Income	\$ 30,429	\$ 35,341	\$ 4,912	16.14%

Source: ESRI Business Analyst Online

<sup>5</sup> Household income does not include the income of people living “group quarters,” including prisons or dormitories

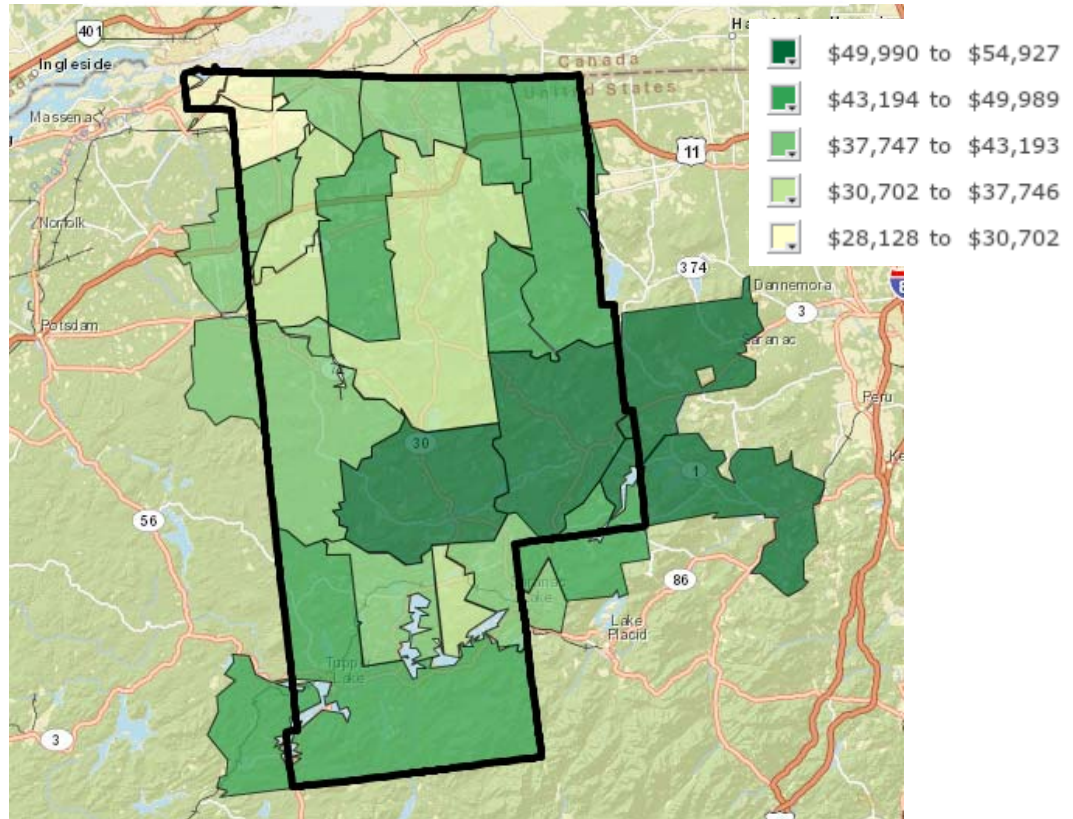
<sup>6</sup> Median HH Income: Value of the midpoint of the distribution of household income in the region.

<sup>7</sup> Average HH Income: Obtained by adding all household incomes and dividing by the number of households.

<sup>8</sup> Per capita income is the total income received in the community in the past 12 months divided by the total population. This includes individuals in “group quarters,” including dormitories and prisons.

The following map illustrates median household income by zip code and shows that the highest income zip codes are centered in the middle of the county and include the areas around Paul Smith's College. The zip code with the largest population, which includes the Town and Village of Malone, has one of the lowest income levels. Additionally, the zip code with the lowest income levels is right along the Canadian border and includes the St. Regis Indian Reservation.

### Median Household Income by Zip Code



## Education Attainment

There are 7 school districts in Franklin County including: Brushton-Moira, Chateaugay, Malone, Salmon River, Saranac Lake, St. Regis Falls, and Tupper Lake. About 84% of Franklin County’s population has a high school diploma as their highest form of education and 45% has at least some college. Over 15% of the population has earned a Bachelor’s degree and 8% a Graduate degree. Franklin County is very similar compared to the rest of the North Country with slightly fewer people attending secondary school compared to the North Country. However, compared to the rest of New York State, North Country residents have a lower level of educational attainment<sup>9</sup>.

Educational Attainment		
Franklin County	%	Cumulative %
Less than 9th Grade	5%	100%
9th - 12th Grade, No Diploma	11%	95%
High School Graduate	39%	84%
Some College, No Degree	16%	45%
Associate Degree	11%	28%
Bachelor's Degree	9%	17%
Graduate/Professional Degree	8%	8%
North Country	%	Cumulative %
Less than 9th Grade	4%	100%
9th - 12th Grade, No Diploma	9%	96%
High School Graduate	38%	86%
Some College, No Degree	18%	49%
Associate Degree	11%	31%
Bachelor's Degree	11%	20%
Graduate/Professional Degree	9%	9%
Upstate NY	%	Cumulative %
Less than 9th Grade	4%	100%
9th - 12th Grade, No Diploma	8%	96%
High School Graduate	30%	88%
Some College, No Degree	18%	58%
Associate Degree	10%	40%
Bachelor's Degree	17%	30%
Graduate/Professional Degree	14%	14%

Source: ESRI Business Analyst Online

## Unemployment

The following table shows the monthly unemployment rate for Franklin County based on information maintained by the NYS Department of Labor. The month with the highest unemployment rate was January 2013 at 11.3%. Unemployment tends to go up in the winter months (January, February, and March) and be lowest in the summer and fall months. The year 2012 had the highest average unemployment rate at 9.5%. It is important to note that since 2009, the month with the lowest rate of unemployment was April 2014 at 7.5% and to date, the average annual unemployment for 2014 is 8.75%.

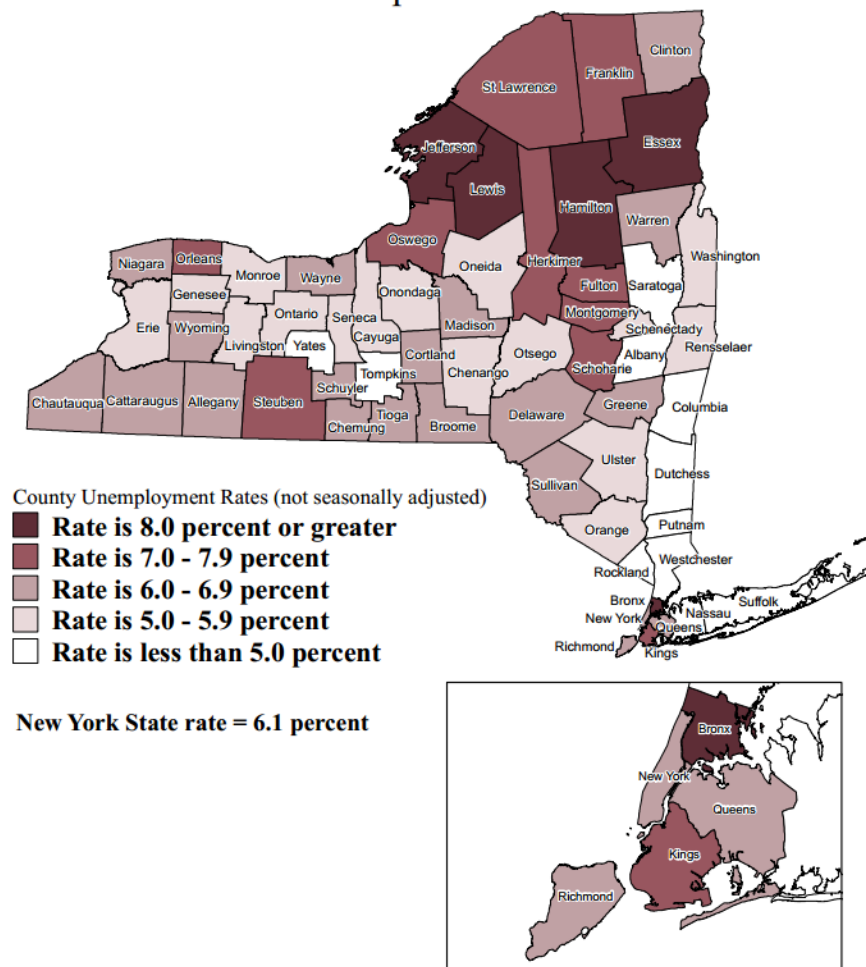
<sup>9</sup> This includes the educational attainment of individuals in “group quarters,” including college dormitories and prisons

Franklin County Unemployment Rate													
Year	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Average
2014	9.30%	9.40%	8.80%	7.50%									
2013	11.30%	10.90%	10.20%	9.50%	8.80%	8.80%	8.50%	8.00%	8.00%	7.80%	7.90%	8.00%	9.00%
2012	10.60%	10.70%	10.60%	9.50%	9.40%	9.30%	9.20%	8.80%	8.60%	8.70%	9.00%	9.70%	9.50%
2011	10.30%	10.10%	9.60%	9.30%	8.80%	8.90%	8.70%	8.40%	8.60%	8.40%	8.80%	9.50%	9.10%
2010	10.40%	10.30%	10.30%	9.50%	8.80%	8.50%	8.40%	8.20%	8.10%	8.30%	9.10%	9.10%	9.10%
2009	9.70%	10.10%	9.80%	8.70%	8.30%	8.20%	7.90%	7.70%	7.70%	8.00%	8.40%	8.90%	8.60%

Source: NYS Department of Labor <http://labor.ny.gov/stats/laus.asp>

The following map was prepared by the New York State Department of Labor and shows the unemployment rate for April 2014. The map shows that Franklin County's unemployment rate is still higher than average for the State (State average of 6.1%), but that within the North Country region are the four counties with the highest rates of unemployment in New York State including Essex, Hamilton, Lewis, and Jefferson.<sup>10</sup>

### Unemployment Rates by County, New York State, April 2014



<sup>10</sup> Map source: [http://www.labor.ny.gov/stats/PDFs/ur\\_map.pdf](http://www.labor.ny.gov/stats/PDFs/ur_map.pdf)

## ECONOMIC BASE ANALYSIS

### Introduction

To analyze the economic base of the county, industry data organized by the North American Industrial Classification System (NAICS) are assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider which aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, are more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). Local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) are not included and certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

NAICS codes are maintained by the U.S. Census Bureau and are the standard used by Federal statistical agencies in classifying business establishments. 2-digit codes are the highest aggregate NAICS code level and represent broad categories such as “retail”, whereas 4-digit industry codes present a finer level of detail such as “grocery stores”. For those interested in understanding the composition of the NAICS and for more detail about what is included in each industry, we direct the reader to <http://www.census.gov/eos/www/naics/>.

### Largest Industries

By looking at industry employment data for 2-digit and 4-digit industry sectors, the relative size of each industry is determined. In the following tables, each industry is ranked from largest to smallest by the number of jobs in 2013. This data is used to identify the largest industries and industry sectors, based on the number of jobs in that sector. It is also used to evaluate the distribution of employment by industry.

We note the following from this data:

- The top three industries in Franklin County, the North Country, and Upstate NY are identical and include Government (largest), Health Care and Social Assistance (second largest), and Retail (third largest).
- The largest 2-digit industry sector in Franklin County is Government, with almost 8,250 jobs (over 35% of the workforce). Government is the largest 2-digit industry in the North Country and Upstate NY geography as well.
- Manufacturing accounts for 455 jobs in Franklin County (2%), 11,514 jobs in the North Country (5%), and 320,107 jobs in Upstate NY (7%)
- Health Care and Social Assistance is the second largest 2-digit sector in the county, with 3,723 jobs (16% of the total workforce). This industry accounts for 12% of North Country jobs and 13% of Upstate jobs.
- At the 4-digit level, Franklin County is dominated by government, education and hospital services. The largest industry in the county not related to government, education, or hospitals is Animal Production, with 620 jobs or 3% of all jobs.
- There are no manufacturing related industries in Franklin County with enough jobs to show up on the top 25 largest industry list.
- Tourism and hospitality services play a large role for Franklin County and the North Country, with major employers including restaurants and traveler accommodations.

Largest Industries							
NAICS	Description	Franklin County		North Country		Upstate New York	
		2013 Jobs	% of All Jobs	2013 Jobs	% of All Jobs	2013 Jobs	% of All Jobs
11	Agriculture, Forestry, Fishing and Hunting	922	4%	7,233	3%	58,829	1%
21	Mining, Quarrying, and Oil and Gas Extraction	49	0%	612	0%	13,751	0%
22	Utilities	38	0%	689	0%	18,117	0%
23	Construction	910	4%	10,132	5%	203,107	4%
31	Manufacturing	455	2%	11,514	5%	320,617	7%
42	Wholesale Trade	231	1%	3,451	2%	128,335	3%
44	Retail Trade	2,510	11%	25,963	12%	502,478	11%
48	Transportation and Warehousing	229	1%	4,797	2%	113,778	2%
51	Information	245	1%	2,304	1%	71,396	2%
52	Finance and Insurance	569	2%	6,922	3%	282,674	6%
53	Real Estate and Rental and Leasing	700	3%	6,846	3%	190,759	4%
54	Professional, Scientific, and Technical Services	680	3%	6,329	3%	282,302	6%
55	Management of Companies and Enterprises	66	0%	1,049	0%	59,699	1%
56	Administrative and Support and Waste Management and Remediation Services	602	3%	6,335	3%	214,441	5%
61	Educational Services (Private)	844	4%	5,664	3%	188,411	4%
62	Health Care and Social Assistance	3,723	16%	27,031	12%	615,890	13%
71	Arts, Entertainment, and Recreation	394	2%	3,863	2%	117,112	3%
72	Accommodation and Food Services	1,299	5%	16,116	7%	299,329	6%
81	Other Services (except Public Administration)	1,167	5%	9,915	4%	233,775	5%
90	Government	8,246	35%	64,398	29%	717,684	15%
<b>Total</b>		<b>23,888</b>		<b>221,349</b>		<b>4,639,423</b>	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Note: Table does not include NAICS 99 "Unclassified Industries"

Franklin County

Largest Industries - 4-digit NAICS			
NAICS	Description	2013 Jobs	% of All Jobs
9029	State Government, Excluding Education and Hospitals	3,326	14%
9039	Local Government, Excluding Education and Hospitals	2,745	11%
9036	Education and Hospitals (Local Government)	1,928	8%
6221	General Medical and Surgical Hospitals (Private)	1,112	5%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	685	3%
1120	Animal Production	620	3%
6113	Colleges, Universities, and Professional Schools (Private)	580	2%
7222	Limited-Service Eating Places	402	2%
7221	Full-Service Restaurants	396	2%
4543	Direct Selling Establishments	387	2%
6243	Vocational Rehabilitation Services	379	2%
6241	Individual and Family Services	361	2%
6211	Offices of Physicians	348	1%
5311	Lessors of Real Estate	335	1%
4451	Grocery Stores	325	1%
4529	Other General Merchandise Stores	324	1%
5617	Services to Buildings and Dwellings	274	1%
4471	Gasoline Stations	266	1%
2361	Residential Building Construction	261	1%
6244	Child Day Care Services	244	1%
2382	Building Equipment Contractors	213	1%
7211	Traveler Accommodation	201	1%
8111	Automotive Repair and Maintenance	198	1%
5239	Other Financial Investment Activities	195	1%
8131	Religious Organizations	186	1%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

North Country

Largest Industries - 4-digit NAICS			
NAICS	Description	2013 Jobs	% of All Jobs
9012	Federal Government, Military	19,408	9%
9036	Education and Hospitals (Local Government)	15,421	7%
9039	Local Government, Excluding Education and Hospitals	11,985	5%
9029	State Government, Excluding Education and Hospitals	9,582	4%
6221	General Medical and Surgical Hospitals (Private)	7,484	3%
7221	Full-Service Restaurants	5,438	2%
9011	Federal Government, Civilian	5,174	2%
7222	Limited-Service Eating Places	5,013	2%
1120	Animal Production	4,578	2%
6113	Colleges, Universities, and Professional Schools (Private)	3,892	2%
4451	Grocery Stores	3,323	2%
7211	Traveler Accommodation	3,292	1%
4529	Other General Merchandise Stores	3,244	1%
5311	Lessors of Real Estate	3,058	1%
6241	Individual and Family Services	2,915	1%
9026	Education and Hospitals (State Government)	2,827	1%
6211	Offices of Physicians	2,770	1%
6231	Nursing Care Facilities	2,706	1%
6244	Child Day Care Services	2,694	1%
5239	Other Financial Investment Activities	2,629	1%
5617	Services to Buildings and Dwellings	2,560	1%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	2,548	1%
4543	Direct Selling Establishments	2,264	1%
2361	Residential Building Construction	2,225	1%
4441	Building Material and Supplies Dealers	2,079	1%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker



Upstate NY

Largest Industries - 4-digit NAICS			
NAICS	Description	2013 Jobs	% of All Jobs
9036	Education and Hospitals (Local Government)	268,281	6%
9039	Local Government, Excluding Education and Hospitals	182,227	4%
6221	General Medical and Surgical Hospitals (Private)	132,427	3%
7221	Full-Service Restaurants	119,218	3%
9029	State Government, Excluding Education and Hospitals	117,310	3%
6113	Colleges, Universities, and Professional Schools (Private)	109,573	2%
5239	Other Financial Investment Activities	109,472	2%
7222	Limited-Service Eating Places	96,842	2%
5311	Lessors of Real Estate	92,961	2%
4451	Grocery Stores	90,007	2%
6211	Offices of Physicians	76,632	2%
5617	Services to Buildings and Dwellings	72,331	2%
6231	Nursing Care Facilities	63,534	1%
5511	Management of Companies and Enterprises	59,699	1%
6241	Individual and Family Services	58,914	1%
9026	Education and Hospitals (State Government)	58,541	1%
6244	Child Day Care Services	55,568	1%
5419	Other Professional, Scientific, and Technical Services	51,946	1%
2382	Building Equipment Contractors	51,426	1%
9011	Federal Government, Civilian	50,507	1%
5613	Employment Services	49,501	1%
7139	Other Amusement and Recreation Industries	48,349	1%
5242	Agencies, Brokerages, and Other Insurance Related Activities	47,543	1%
5313	Activities Related to Real Estate	46,872	1%
8121	Personal Care Services	42,838	1%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Fastest Growing Industries 2003-2013

Looking at past changes in employment by industry helps to identify which industries have experienced rapid growth/decline. This information can be used to detect industries that might be struggling or, on the other hand, those that are thriving. To identify the fastest growing industries, the historic change in employment is presented by the number of jobs lost or gained and the percent change within each industry over the last ten years (2003-2013).

Key findings from the fastest growing industry data analysis are as follows:

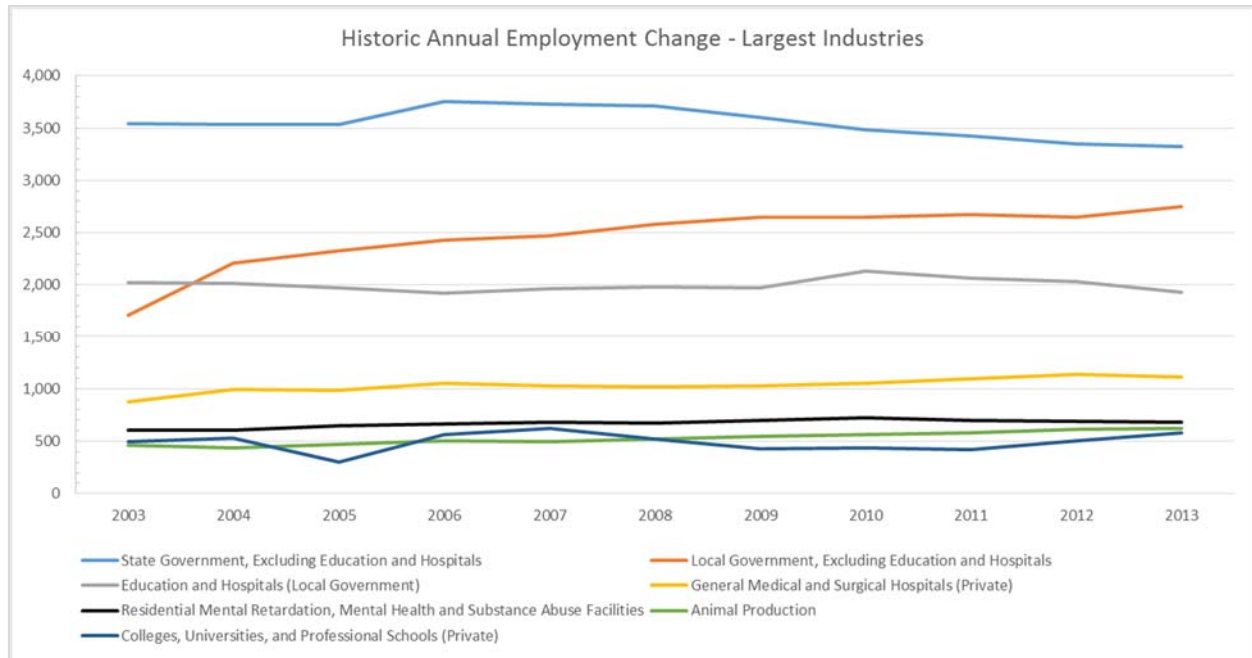
- Overall the three geographies saw between a 6% and 7% increase in overall employment between 2003 and 2013. Franklin County added 1,620 jobs (7%), the North Country added 15,066 jobs (7%), and Upstate NY added 246,726 jobs (6%).
- At the 2-digit level, Government is the fastest growing industry in Franklin County, adding 687 jobs or a 9% increase. Health Care and Social Assistance is the second fastest growing industry in Franklin County and the North Country, with about 12-14% growth from 2003 to 2013.
- The largest percent growing industry in Franklin County is Administrative and Support and Waste Management and Remediation Services, which added about 319 employees from 2003-13. This growth was largely driven by the subsector Services to Buildings and Dwellings, which is shown as the sixth fastest growing industry in this geography at the 4-digit level.
- From 2003-13, the Manufacturing sector lost jobs in all three geographies ranging from a 40% decline in Franklin County (300 jobs) to a 21% decline in Upstate NY (87,625 jobs).
- Franklin County added 29 jobs in the Information industry at a time when the North Country and Upstate NY both lost jobs in that industry.
- At the 4-digit level Other General Merchandise Stores is the second fastest growing industry in Franklin County (adding 256 jobs) and the North Country (adding 2,124 jobs).
- There are a number of professional industries that saw an increase in jobs including Other Financial Investment Activities; Activities Related to Real Estate; Management, Scientific, and other Technical Consulting Services; Offices of Other Health Practitioners; Office Administrative Services; Management of Companies and Enterprises; and Agencies, Brokerages, and Other Insurance Related Activities.
- Agriculture related industries are clearly important to Franklin County and the North Country with Animal Production adding 158 jobs in the county and 529 jobs throughout the North Country. Franklin County also has Dairy Product Manufacturing as a top 25 fastest growing industry, adding 39 jobs (71% increase) between 2003 and 2013. At the 2-digit level Agriculture, Forestry, Fishing and Hunting grew by 21% where it only grew by 6% in the North Country and declined by 1% in Upstate NY. Note that EMSI tends to undercount farm related employment and additional research will be conducted using the 2012 Census of Agriculture to more accurately define the farming and agriculture industry in Franklin County.
- Mental health related industries are important to both the Franklin County and North Country.

Historic Employment Change							
NAICS	Description	Franklin County		North Country		Upstate NY	
		2003-2013 Change	2003-2013 % Change	2003-2013 Change	2003-2013 % Change	2003-2013 Change	2003-2013 % Change
11	Agriculture, Forestry, Fishing and Hunting	162	21%	435	6%	(610)	-1%
21	Mining, Quarrying, and Oil and Gas Extraction	21	75%	64	12%	4,380	47%
22	Utilities	(21)	-36%	(163)	-19%	(3,819)	-17%
23	Construction	(40)	-4%	(261)	-3%	(10,386)	-5%
31	Manufacturing	(300)	-40%	(5,022)	-30%	(87,625)	-21%
42	Wholesale Trade	27	13%	247	8%	(5,094)	-4%
44	Retail Trade	189	8%	1,016	4%	(1,121)	0%
48	Transportation and Warehousing	(41)	-15%	(134)	-3%	4,478	4%
51	Information	29	13%	(188)	-8%	(20,961)	-23%
52	Finance and Insurance	64	13%	2,427	54%	88,230	45%
53	Real Estate and Rental and Leasing	227	48%	2,635	63%	60,678	47%
54	Professional, Scientific, and Technical Services	40	6%	780	14%	33,458	13%
55	Management of Companies and Enterprises	35	113%	(334)	-24%	12,454	26%
56	Administrative and Support and Waste Management and Remediation Services	319	113%	1,572	33%	22,254	12%
61	Educational Services (Private)	162	24%	415	8%	27,797	17%
62	Health Care and Social Assistance	448	14%	2,993	12%	75,863	14%
71	Arts, Entertainment, and Recreation	(345)	-47%	235	6%	20,303	21%
72	Accommodation and Food Services	42	3%	1,517	10%	40,690	16%
81	Other Services (except Public Administration)	(75)	-6%	43	0%	11,370	5%
90	Government	687	9%	6,837	12%	(23,985)	-3%
<b>Total</b>		<b>1,620</b>	<b>7%</b>	<b>15,066</b>	<b>7%</b>	<b>246,726</b>	<b>6%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Note: Table does not include NAICS 99 "Unclassified Industries"

The chart below shows the annual change in employment in Franklin County’s 7 largest industries, including: state government (excluding education and hospitals); education and hospitals (local government); residential mental retardation; mental health and substance abuse facilities; colleges, universities, and professional schools (private); local government (excluding education and hospitals); general medical and surgical hospitals (private); and animal production.



Franklin County

Fastest Growing Industries (Historic) - 4-digit NAICS					
NAICS	Description	2003 Jobs	2013 Jobs	Number Change	Percent Change
9039	Local Government, Excluding Education and Hospitals	1,712	2,745	1,033	60%
4529	Other General Merchandise Stores	68	324	256	376%
6221	General Medical and Surgical Hospitals (Private)	877	1,112	235	27%
1120	Animal Production	462	620	158	34%
5311	Lessors of Real Estate	188	335	147	78%
5617	Services to Buildings and Dwellings	138	274	136	99%
3122	Tobacco Manufacturing	0	125	125	100%
7223	Special Food Services	28	147	119	425%
5239	Other Financial Investment Activities	80	195	115	144%
2382	Building Equipment Contractors	122	213	91	75%
5313	Activities Related to Real Estate	79	166	87	110%
5416	Management, Scientific, and Technical Consulting Services	54	139	85	157%
6113	Colleges, Universities, and Professional Schools (Private)	499	580	81	16%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	607	685	78	13%
6213	Offices of Other Health Practitioners	99	167	68	69%
4539	Other Miscellaneous Store Retailers	91	159	68	75%
6243	Vocational Rehabilitation Services	313	379	66	21%
7222	Limited-Service Eating Places	341	402	61	18%
8111	Automotive Repair and Maintenance	157	198	41	26%
5611	Office Administrative Services	19	59	40	211%
3115	Dairy Product Manufacturing	55	94	39	71%
6211	Offices of Physicians	312	348	36	12%
5511	Management of Companies and Enterprises	31	66	35	113%
8131	Religious Organizations	153	186	33	22%
5242	Agencies, Brokerages, and Other Insurance Related Activities	123	156	33	27%
<b>Total</b>		<b>22,268</b>	<b>23,888</b>	<b>1,620</b>	<b>7%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

North Country

Fastest Growing Industries (Historic) - 4-digit NAICS					
NAICS	Description	2003 Jobs	2013 Jobs	Number Change	Percent Change
9012	Federal Government, Military	11,978	19,408	7,430	62%
4529	Other General Merchandise Stores	1,120	3,244	2,124	190%
5239	Other Financial Investment Activities	804	2,629	1,825	227%
5311	Lessors of Real Estate	1,753	3,058	1,305	74%
9039	Local Government, Excluding Education and Hospitals	10,836	11,985	1,149	11%
5617	Services to Buildings and Dwellings	1,695	2,560	865	51%
7222	Limited-Service Eating Places	4,154	5,013	859	100%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	1,807	2,548	741	41%
5313	Activities Related to Real Estate	845	1,541	696	82%
6221	General Medical and Surgical Hospitals (Private)	6,806	7,484	678	10%
5312	Offices of Real Estate Agents and Brokers	998	1,653	655	66%
6241	Individual and Family Services	2,300	2,915	615	27%
9011	Federal Government, Civilian	4,570	5,174	604	13%
1120	Animal Production	4,049	4,578	529	13%
5614	Business Support Services	730	1,238	508	70%
5419	Other Professional, Scientific, and Technical Services	1,331	1,815	484	36%
5231	Securities and Commodity Contracts Intermediation and Brokerage	214	621	407	190%
6213	Offices of Other Health Practitioners	989	1,367	378	38%
8121	Personal Care Services	1,301	1,675	374	29%
6113	Colleges, Universities, and Professional Schools (Private)	3,531	3,892	361	10%
6244	Child Day Care Services	2,346	2,694	348	15%
5242	Agencies, Brokerages, and Other Insurance Related Activities	1,445	1,793	348	24%
7211	Traveler Accommodation	2,961	3,292	331	11%
7223	Special Food Services	843	1,161	318	38%
5416	Management, Scientific, and Technical Consulting Services	579	869	290	50%
<b>Total</b>		<b>206,283</b>	<b>221,349</b>	<b>15,066</b>	<b>7%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Upstate NY

Fastest Growing Industries (Historic) - 4-digit NAICS					
NAICS	Description	2003 Jobs	2013 Jobs	Number Change	Percent Change
5239	Other Financial Investment Activities	39,007	109,472	70,465	181%
5311	Lessors of Real Estate	57,987	92,961	34,974	60%
5313	Activities Related to Real Estate	27,000	46,872	19,872	74%
7222	Limited-Service Eating Places	78,292	96,842	18,550	24%
5617	Services to Buildings and Dwellings	55,485	72,331	16,846	30%
7221	Full-Service Restaurants	105,183	119,218	14,035	13%
6241	Individual and Family Services	45,067	58,914	13,847	100%
6113	Colleges, Universities, and Professional Schools (Private)	96,034	109,573	13,539	14%
4529	Other General Merchandise Stores	24,592	37,894	13,302	54%
5416	Management, Scientific, and Technical Consulting Services	26,762	39,759	12,997	49%
5511	Management of Companies and Enterprises	47,245	59,699	12,454	26%
8121	Personal Care Services	31,135	42,838	11,703	38%
5231	Securities and Commodity Contracts Intermediation and Brokerage	12,141	22,252	10,111	83%
6216	Home Health Care Services	27,683	37,691	10,008	36%
5242	Agencies, Brokerages, and Other Insurance Related Activities	37,724	47,543	9,819	26%
6116	Other Schools and Instruction (Private)	19,264	28,970	9,706	50%
5312	Offices of Real Estate Agents and Brokers	27,532	37,174	9,642	35%
6211	Offices of Physicians	67,638	76,632	8,994	13%
6213	Offices of Other Health Practitioners	30,285	39,253	8,968	30%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	30,473	38,983	8,510	28%
7139	Other Amusement and Recreation Industries	40,089	48,349	8,260	21%
5419	Other Professional, Scientific, and Technical Services	43,941	51,946	8,005	18%
6244	Child Day Care Services	47,952	55,568	7,616	16%
5614	Business Support Services	23,901	31,336	7,435	31%
6221	General Medical and Surgical Hospitals (Private)	126,174	132,427	6,253	5%
<b>Total</b>		<b>4,392,697</b>	<b>4,639,423</b>	<b>246,726</b>	<b>6%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Projected Industry Growth 2013-2023

Projected changes in employment from 2013 to 2023 are presented in the following tables.

Notable observations from the projected industry data include:

- Over the next 10 years, Franklin County is expected to grow at the fastest rate, increasing jobs by 11% while the North Country is adding 8% and Upstate NY will add 10%. Health Care industries will likely continue to be lead growth sectors in local and regional geographies.
- The second fastest growing industry is expected to be Administrative and Support and Waste Management and Remediation Services.<sup>11</sup>
- Other Financial Investment Activities will lead the growth in the North Country and Upstate NY.<sup>12</sup>
- There is projected to be growth in the Lessors of Real Estate industry in all three geographies. Other property related industries are also seeing growth such as Services to Buildings and Dwellings, and Activities Related to Real Estate.
- The Construction industry is projected to see a slight comeback after losing a significant number of jobs between 2003 and 2013.

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<sup>11</sup> **Administrative and Support and Waste Management and Remediation Services** sector (NAICS 56) comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

<sup>12</sup> **Other Financial Investment Activities** sector (NAICS 5239) includes establishments primarily engaged in one of the following: (1) acting as principals in buying or selling financial contracts (except investment bankers, securities dealers, and commodity contracts dealers); (2) acting as agents (i.e., brokers) (except securities brokerages and commodity contracts brokerages) in buying or selling financial contracts; or (3) providing other investment services (except securities and commodity exchanges), such as portfolio management; investment advice; and trust, fiduciary, and custody services

Projected Employment Change							
NAICS	Description	Franklin County		North Country		Upstate NY	
		2013-2023 Change	2013-2023 % Change	2013-2023 Change	2013-2023 % Change	2013-2023 Change	2013-2023 % Change
11	Agriculture, Forestry, Fishing and Hunting	46	5%	(187)	-3%	(3,278)	-6%
21	Mining, Quarrying, and Oil and Gas Extraction	31	63%	135	22%	4,348	32%
22	Utilities	5	13%	(98)	-14%	(548)	-3%
23	Construction	30	3%	272	3%	11,917	6%
31	Manufacturing	(21)	-5%	(1,197)	-10%	(23,238)	-7%
42	Wholesale Trade	38	16%	363	11%	10,427	8%
44	Retail Trade	154	6%	2,099	8%	21,281	4%
48	Transportation and Warehousing	30	13%	526	11%	9,897	9%
51	Information	19	8%	108	5%	(3,898)	-5%
52	Finance and Insurance	95	17%	2,143	31%	72,674	26%
53	Real Estate and Rental and Leasing	241	34%	2,045	30%	48,699	26%
54	Professional, Scientific, and Technical Services	53	8%	984	16%	35,313	13%
55	Management of Companies and Enterprises	30	45%	97	9%	6,107	10%
56	Administrative and Support and Waste Management and Remediation Services	384	64%	1,873	30%	42,476	20%
61	Educational Services (Private)	106	13%	364	6%	23,634	13%
62	Health Care and Social Assistance	697	19%	4,671	17%	115,725	19%
71	Arts, Entertainment, and Recreation	128	32%	777	20%	28,302	24%
72	Accommodation and Food Services	211	16%	1,639	10%	34,732	12%
81	Other Services (except Public Administration)	78	7%	1,374	14%	32,452	14%
90	Government	219	3%	(1,140)	-2%	(11,169)	-2%
<b>Total</b>		<b>2,564</b>	<b>11%</b>	<b>16,837</b>	<b>8%</b>	<b>455,488</b>	<b>10%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Note: Table does not include NAICS 99 "Unclassified Industries"

Franklin County

Fastest Growing Industries (Projected) - 4-digit NAICS					
NAICS	Description	2013 Jobs	2023 Jobs	Number Change	Percent Change
6221	General Medical and Surgical Hospitals (Private)	1,112	1,299	187	17%
5613	Employment Services	128	306	178	139%
6113	Colleges, Universities, and Professional Schools (Private)	580	757	177	31%
5311	Lessors of Real Estate	335	476	141	42%
4529	Other General Merchandise Stores	324	464	140	43%
5617	Services to Buildings and Dwellings	274	400	126	46%
5239	Other Financial Investment Activities	195	312	117	100%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	685	801	116	17%
6243	Vocational Rehabilitation Services	379	494	115	30%
2382	Building Equipment Contractors	213	320	107	50%
9039	Local Government, Excluding Education and Hospitals	2,745	2,851	106	4%
9036	Education and Hospitals (Local Government)	1,928	2,027	99	5%
6213	Offices of Other Health Practitioners	167	252	85	51%
1120	Animal Production	620	695	75	12%
7223	Special Food Services	147	220	73	50%
6214	Outpatient Care Centers	156	227	71	46%
6241	Individual and Family Services	361	430	69	19%
4539	Other Miscellaneous Store Retailers	159	227	68	43%
5416	Management, Scientific, and Technical Consulting Services	139	203	64	46%
5313	Activities Related to Real Estate	166	229	63	38%
7222	Limited-Service Eating Places	402	457	55	14%
7211	Traveler Accommodation	201	253	52	26%
7139	Other Amusement and Recreation Industries	178	228	50	28%
8111	Automotive Repair and Maintenance	198	246	48	24%
9029	State Government, Excluding Education and Hospitals	3,326	3,368	42	1%
<b>Total</b>		<b>23,888</b>	<b>26,452</b>	<b>2,564</b>	<b>11%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

North Country

Fastest Growing Industries (Projected) - 4-digit NAICS					
NAICS	Description	2013 Jobs	2023 Jobs	Number Change	Percent Change
5239	Other Financial Investment Activities	2,629	4,190	1,561	59%
4529	Other General Merchandise Stores	3,244	4,438	1,194	37%
5311	Lessors of Real Estate	3,058	4,089	1,031	34%
5617	Services to Buildings and Dwellings	2,560	3,335	775	30%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	2,548	3,262	714	28%
6241	Individual and Family Services	2,915	3,586	671	23%
6221	General Medical and Surgical Hospitals (Private)	7,484	8,107	623	100%
7222	Limited-Service Eating Places	5,013	5,563	550	11%
5313	Activities Related to Real Estate	1,541	2,033	492	32%
5614	Business Support Services	1,238	1,721	483	39%
6213	Offices of Other Health Practitioners	1,367	1,831	464	34%
8134	Civic and Social Organizations	901	1,302	401	45%
5419	Other Professional, Scientific, and Technical Services	1,815	2,211	396	22%
5312	Offices of Real Estate Agents and Brokers	1,653	2,037	384	23%
5242	Agencies, Brokerages, and Other Insurance Related Activities	1,793	2,161	368	21%
6211	Offices of Physicians	2,770	3,134	364	13%
6244	Child Day Care Services	2,694	3,057	363	13%
7139	Other Amusement and Recreation Industries	1,760	2,118	358	20%
7211	Traveler Accommodation	3,292	3,644	352	11%
5231	Securities and Commodity Contracts Intermediation and Brokerage	621	959	338	54%
6231	Nursing Care Facilities	2,706	3,036	330	12%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	512	841	329	64%
4441	Building Material and Supplies Dealers	2,079	2,404	325	16%
8121	Personal Care Services	1,675	1,981	306	18%
5416	Management, Scientific, and Technical Consulting Services	869	1,171	302	35%
<b>Total</b>		<b>221,349</b>	<b>238,186</b>	<b>16,837</b>	<b>8%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker



Upstate NY

Fastest Growing Industries (Projected) - 4-digit NAICS					
NAICS	Description	2013 Jobs	2023 Jobs	Number Change	Percent Change
5239	Other Financial Investment Activities	109,472	167,784	58,312	53%
5311	Lessors of Real Estate	92,961	122,894	29,933	32%
5617	Services to Buildings and Dwellings	72,331	93,954	21,623	30%
6113	Colleges, Universities, and Professional Schools (Private)	109,573	126,748	17,175	16%
6241	Individual and Family Services	58,914	75,949	17,035	29%
6216	Home Health Care Services	37,691	52,428	14,737	39%
5313	Activities Related to Real Estate	46,872	60,706	13,834	100%
6211	Offices of Physicians	76,632	90,427	13,795	18%
7222	Limited-Service Eating Places	96,842	110,624	13,782	14%
7139	Other Amusement and Recreation Industries	48,349	61,277	12,928	27%
6244	Child Day Care Services	55,568	66,807	11,239	20%
5614	Business Support Services	31,336	42,386	11,050	35%
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	38,983	49,832	10,849	28%
7221	Full-Service Restaurants	119,218	129,819	10,601	9%
8121	Personal Care Services	42,838	53,042	10,204	24%
6213	Offices of Other Health Practitioners	39,253	49,183	9,930	25%
5416	Management, Scientific, and Technical Consulting Services	39,759	49,240	9,481	24%
4529	Other General Merchandise Stores	37,894	46,698	8,804	23%
6231	Nursing Care Facilities	63,534	72,137	8,603	14%
5231	Securities and Commodity Contracts Intermediation and Brokerage	22,252	30,826	8,574	39%
2361	Residential Building Construction	32,228	40,038	7,810	24%
5242	Agencies, Brokerages, and Other Insurance Related Activities	47,543	54,494	6,951	15%
5419	Other Professional, Scientific, and Technical Services	51,946	58,828	6,882	13%
6214	Outpatient Care Centers	16,399	23,170	6,771	41%
2382	Building Equipment Contractors	51,426	57,909	6,483	13%
<b>Total</b>		<b>4,639,423</b>	<b>5,094,911</b>	<b>455,488</b>	<b>10%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Concentrated Industries: Location Quotient Analysis

Location Quotient (LQ) analysis compares a specific geographic region to a larger reference area by quantifying how concentrated a particular industry, demographic group, or other variable is as compared to the larger geography. In this section, employment by industry in Franklin County and the North Country is compared to the State to identify which industries are more highly concentrated in the region than at the state level.

LQ is calculated by dividing the percent of jobs within each industry locally by the percent of jobs in the same industry at the state level. For example, if the finance and insurance industry accounts for 2% of jobs in a community and at the state level this industry has 1% of the total jobs, the community has a LQ of 2.0 ( $0.02 \div 0.01 = 2$ ). In this example, the local community employs twice as many individuals in the industry as expected based on state employment patterns. Typically, only values above 1.20 or below 0.80 are considered “significant” findings in LQ analysis. Industries with a high LQ and high employment numbers are assumed to produce more than what is needed locally (i.e. a surplus) and export their products and services.

The following tables contain the results of the national LQ analysis for the three geographies at the 2-digit level. In addition, an analysis was conducted to identify the top 25 largest state LQs in 2013 and compare them to their 2003 LQ and projected 2023 LQ.

From the LQ analysis, we note the following:

- Compared to the national average, Franklin County has a very high concentration of employment in the Agriculture, Forestry, and Fishing industry (7.81).
- Franklin County only has a significant national location quotient in Agriculture, Forestry, and Fishing (78); Mining, Quarrying, and Oil and Gas Extraction (2.05); and, Government (2.87).
- All of the top 25 industries are significantly concentrated compared to the State with the largest being Tobacco Manufacturing which is projected to get stronger in the coming years in Franklin County. This is a direct result of the St. Regis Indian Reservation where they produce and sell cigarettes.
- The most concentrated industries in Franklin County are agriculture and forestry related including Support Activities for Forestry; Logging; Animal Production; Sawmills and Wood Preservation; Support Activities for Crop Production; and Dairy Production Manufacturing.
- The most concentrated industries in the North Country are in the production/manufacturing industries including Alumina and Aluminum Production and Processing; Railroad Rolling Stock Manufacturing; Pulp, Paper and Paperboard Mills; Tobacco Manufacturing; Logging; and others.

National Location Quotient				
NAICS	Description	Franklin County	North Country	Upstate NY
		2013 National LQ	2013 National LQ	2013 National LQ
11	Agriculture, Forestry, Fishing and Hunting	7.81	1.70	0.66
21	Mining, Quarrying, and Oil and Gas Extraction	2.05	0.35	0.37
22	Utilities	0.56	0.98	1.24
23	Construction	0.85	0.92	0.88
31	Manufacturing	0.49	0.75	1.00
42	Wholesale Trade	0.33	0.45	0.80
44	Retail Trade	1.13	1.18	1.09
48	Transportation and Warehousing	0.33	0.67	0.76
51	Information	0.43	0.57	0.85
52	Finance and Insurance	0.30	0.56	1.08
53	Real Estate and Rental and Leasing	0.70	0.67	0.89
54	Professional, Scientific, and Technical Services	0.34	0.42	0.89
55	Management of Companies and Enterprises	0.28	0.38	1.04
56	Administrative and Support and Waste Management and Remediation Services	0.68	0.46	0.74
61	Educational Services (Private)	0.88	1.05	1.66
62	Health Care and Social Assistance	1.13	1.09	1.19
71	Arts, Entertainment, and Recreation	0.62	0.79	1.14
72	Accommodation and Food Services	0.88	1.02	0.90
81	Other Services (except Public Administration)	0.80	0.79	0.89
90	Government	2.87	2.20	1.17

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
 Note: Table does not include NAICS 99 "Unclassified Industries"

Franklin County

State Location Quotient - 4-digit NAICS					
NAICS	Description	2003 LQ	2013 LQ	2023 LQ	Trend
3122	Tobacco Manufacturing	0.00	147.11	132.10	↘
1153	Support Activities for Forestry	10.07	18.31	18.12	↘
1133	Logging	13.79	16.64	21.29	↗
1120	Animal Production	7.89	10.65	12.17	↗
9029	State Government, Excluding Education and Hospitals	9.64	10.45	10.97	↗
6243	Vocational Rehabilitation Services	4.73	6.00	7.03	↗
3211	Sawmills and Wood Preservation	9.44	5.75	0.00	↘
1151	Support Activities for Crop Production	4.75	5.68	6.46	↗
7212	RV (Recreational Vehicle) Parks and Recreational Camps	4.23	5.66	5.14	↘
3115	Dairy Product Manufacturing	3.02	4.81	4.66	↘
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	4.98	4.50	4.09	↘
4471	Gasoline Stations	3.61	4.41	5.05	↗
3141	Textile Furnishings Mills	0.00	4.34	14.65	↗
1152	Support Activities for Animal Production	4.05	3.96	4.93	↗
6114	Business Schools and Computer and Management Training (Private)	0.00	3.57	3.26	↘
3241	Petroleum and Coal Products Manufacturing	12.42	3.36	0.00	↘
4543	Direct Selling Establishments	2.70	3.20	3.47	↗
9039	Local Government, Excluding Education and Hospitals	1.68	2.90	3.06	↗
4529	Other General Merchandise Stores	0.71	2.78	3.50	↗
4412	Other Motor Vehicle Dealers	3.63	2.54	2.13	↘
3261	Plastics Product Manufacturing	2.41	2.44	1.75	↘
5322	Consumer Goods Rental	1.69	2.14	2.37	↗
7131	Amusement Parks and Arcades	0.00	2.05	4.33	↗
4442	Lawn and Garden Equipment and Supplies Stores	1.58	2.00	2.35	↗
4539	Other Miscellaneous Store Retailers	1.25	1.91	2.57	↗

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

North Country

State Location Quotient - 4-digit NAICS					
NAICS	Description	2003 LQ	2013 LQ	2023 LQ	Trend
3313	Alumina and Aluminum Production and Processing	21.24	20.32	18.70	↘
3365	Railroad Rolling Stock Manufacturing	22.70	17.40	14.28	↘
3221	Pulp, Paper, and Paperboard Mills	18.70	16.84	15.83	↘
9012	Federal Government, Military	10.50	16.77	17.92	↗
3122	Tobacco Manufacturing	0.00	15.88	14.67	↘
1133	Logging	13.14	13.59	16.01	↗
1131	Timber Tract Operations	12.87	13.00	0.00	↘
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	6.13	9.56	9.76	↗
1120	Animal Production	7.47	8.49	9.04	↗
1142	Hunting and Trapping	6.36	8.30	9.78	↗
1153	Support Activities for Forestry	8.12	7.43	7.05	↘
3351	Electric Lighting Equipment Manufacturing	5.30	6.99	6.87	↘
3241	Petroleum and Coal Products Manufacturing	4.17	6.40	7.36	↗
7212	RV (Recreational Vehicle) Parks and Recreational Camps	5.24	6.26	6.81	↗
1151	Support Activities for Crop Production	4.51	5.75	6.66	↗
3346	Manufacturing and Reproducing Magnetic and Optical Media	4.79	5.07	0.00	↘
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	2.89	4.39	4.78	↗
3115	Dairy Product Manufacturing	5.69	4.21	3.26	↘
2123	Nonmetallic Mineral Mining and Quarrying	3.51	3.88	4.24	↗
3272	Glass and Glass Product Manufacturing	3.05	3.83	4.52	↗
3211	Sawmills and Wood Preservation	4.40	3.72	3.06	↘
4471	Gasoline Stations	2.94	3.52	4.10	↗
1141	Fishing	2.52	3.37	3.72	↗
9029	State Government, Excluding Education and Hospitals	3.20	3.25	3.41	↗
4529	Other General Merchandise Stores	1.26	3.00	3.72	↗

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Upstate NY

State Location Quotient - 4-digit NAICS					
NAICS	Description	2003 LQ	2013 LQ	2023 LQ	Trend
3313	Alumina and Aluminum Production and Processing	2.22	2.48	2.54	
1120	Animal Production	2.31	2.47	2.54	
3365	Railroad Rolling Stock Manufacturing	2.35	2.47	2.54	
3361	Motor Vehicle Manufacturing	2.16	2.45	2.51	
2111	Oil and Gas Extraction	2.19	2.43	2.53	
3331	Agriculture, Construction, and Mining Machinery Manufacturing	2.27	2.43	2.51	
1132	Forest Nurseries and Gathering of Forest Products	2.12	2.43	2.54	
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	2.19	2.42	2.53	
1133	Logging	2.31	2.41	2.44	
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	2.27	2.40	2.46	
3211	Sawmills and Wood Preservation	2.28	2.40	2.50	
3112	Grain and Oilseed Milling	2.05	2.38	2.45	
1131	Timber Tract Operations	2.34	2.38	2.29	
3111	Animal Food Manufacturing	1.98	2.37	2.48	
2123	Nonmetallic Mineral Mining and Quarrying	2.23	2.36	2.40	
3271	Clay Product and Refractory Manufacturing	2.20	2.35	2.35	
3314	Nonferrous Metal (except Aluminum) Production and Processing	2.20	2.33	2.37	
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	2.14	2.32	2.41	
3221	Pulp, Paper, and Paperboard Mills	2.29	2.32	2.26	
3312	Steel Product Manufacturing from Purchased Steel	2.28	2.31	2.09	
3311	Iron and Steel Mills and Ferroalloy Manufacturing	2.11	2.30	2.35	
3115	Dairy Product Manufacturing	2.01	2.28	2.40	
3259	Other Chemical Product and Preparation Manufacturing	2.17	2.26	1.56	
3363	Motor Vehicle Parts Manufacturing	2.14	2.25	2.47	
3362	Motor Vehicle Body and Trailer Manufacturing	2.14	2.24	1.28	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Competitive Industries: Shift Share Analysis

Shift Share Analysis distinguishes an industry's employment growth in a specific area that is attributable to local competitive advantages or disadvantages from growth which is attributable to overall national employment trends or national employment trends in that industry.

The shift share analysis helps to answer the question of *"Why is employment growing or declining in this regional industry, cluster, or occupation?"* To do this, shift share analysis splits regional job growth into three components: the national change effect, industrial mix effect, and regional competitiveness effect. The following table shows whether Franklin County has a particular competitive advantage compared to the other geographies. A shift share analysis is based on four factors:

- **The Industrial Mix Effect** - The industrial mix effect represents the share of regional industry growth explained by the growth of the specific industry at the national level. To arrive at this number, the national growth rate of the total economy is subtracted from the national growth rate of the specific industry, and this growth percentage is applied to the regional jobs in that industry.
- **The National Growth Effect** - The national growth effect explains how much of the regional industry's growth is explained by the overall growth of the national economy: if the nation's whole economy is growing, you would generally expect to see some positive change in each industry in your local region (the proverbial "rising tide that lifts all boats" analogy).
- **The Expected Change** - This is simply the rate of growth of the particular industry at the national level. Algebraically, the expected change is the sum of the industrial mix and the national growth effects.
- **The Regional Competitive Effect** - The regional competitive effect is the most interesting of the three indicators. It explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses, because the growth cannot be explained by national trends in that industry or the economy as whole. This effect is calculated by taking the total regional growth of the given industry and subtracting the national growth for that same industry. Note that this effect can be positive even as regional employment in the industry declines. This would indicate that regional decline is less than the national decline.

The following tables contain the results of the shift share analysis for the three geographies at the 2-digit level. In addition, an analysis was conducted to identify the 25 industries with the largest regional competitive effect between 2003 and 2013.

The following are some of the key findings of the shift share analysis:

- At the 2-digit NAICS code level, the private sector industries with the greatest employment growth attributable to regional competitive advantages in Franklin County include:
  - Agriculture, Forestry, Fishing and Hunting
  - Retail trade
  - Administrative and Support and Waste Management and Remediation Services
- Franklin County has a positive competitive effect in Management of Companies and Enterprises and the other two geographies have a negative effect.
- Franklin County and the North Country are competitive in many of the same industries. However, the competitive industries of these areas differ from those of Upstate New York as a whole, where service industries are more competitive.
- Franklin County and the North Country both have a competitive advantage in Agriculture, Forestry, Fishing and Hunting where Upstate NY has a negative effect.

- Animal Production has the third largest competitive effect in Franklin County, growing faster than the national growth. Animal Production has the fourth largest competitive effect in the North Country and it does not appear on the list for the rest of Upstate New York. This indicates strength in the region in Animal Production and other agriculture related industries.
- At the 4-digit NAICS Code, the agricultural industries that are the most locally competitive in Franklin County include Animal Production, Tobacco Manufacturing, and Dairy Product Manufacturing. In the retail sector, General Merchandise Stores, Special Food Stores, and Direct Selling Establishments have the greatest local competitive advantage.
- While many of the industries that are locally competitive in Franklin County are also competitive in the North Country, the North Country shows more local competitive advantages in certain financial services industry sectors, including Business Support Services and Securities and Commodity Contracts Intermediation and Brokerage
- Government and Health Care continue to show their importance in the regional economy as related industries have some of the highest regional competitive effects in Franklin County and the North Country.

Shift Share Analysis				
NAICS	Description	Franklin County	North Country	Upstate NY
		Competitive Effect	Competitive Effect	Competitive Effect
11	Agriculture, Forestry, Fishing and Hunting	157	397	(950)
21	Mining, Quarrying, and Oil and Gas Extraction	(1)	(379)	(3,205)
22	Utilities	(19)	(140)	(3,247)
23	Construction	41	629	7,891
31	Manufacturing	(182)	(2,427)	(23,574)
42	Wholesale Trade	18	98	(11,307)
44	Retail Trade	184	957	(2,305)
48	Transportation and Warehousing	(75)	(739)	(8,920)
51	Information	48	34	(12,729)
52	Finance and Insurance	(84)	1,106	31,141
53	Real Estate and Rental and Leasing	37	943	8,384
54	Professional, Scientific, and Technical Services	(101)	(449)	(21,623)
55	Management of Companies and Enterprises	26	(752)	(1,832)
56	Administrative and Support and Waste Management and Remediation Services	275	842	(7,198)
61	Educational Services (Private)	(51)	(1,227)	(22,469)
62	Health Care and Social Assistance	(428)	(3,440)	(68,646)
71	Arts, Entertainment, and Recreation	(521)	(632)	(2,836)
72	Accommodation and Food Services	(185)	(1,121)	(6,029)
81	Other Services (except Public Administration)	(228)	(1,170)	(15,936)
90	Government	550	5,794	(37,414)

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
Note: Table does not include NAICS 99 "Unclassified Industries"



Franklin County

NAICS	Description	2003-2013 Employment Change	Industry Mix Effect	National Growth Effect	Expected Change	Regional Competitive Effect
9039	Local Government, Excluding Education and Hospitals	1,033	(130)	174	44	989
4529	Other General Merchandise Stores	256	19	7	26	230
1120	Animal Production	158	(42)	47	5	153
6221	General Medical and Surgical Hospitals (Private)	235	13	89	102	134
5613	Employment Services	128	-	-	-	125
3122	Tobacco Manufacturing	125	(1)	-	(1)	125
7223	Special Food Services	119	6	3	9	110
2382	Building Equipment Contractors	91	(14)	12	(2)	92
5617	Services to Buildings and Dwellings	136	32	14	46	90
6114	Business Schools and Computer and Management Training (Private)	85	-	1	1	75
4543	Direct Selling Establishments	26	(80)	37	(43)	69
4539	Other Miscellaneous Store Retailers	68	1	9	10	58
6243	Vocational Rehabilitation Services	66	(21)	32	11	55
5416	Management, Scientific, and Technical Consulting Services	85	27	5	32	52
2361	Residential Building Construction	9	(64)	26	(38)	47
5313	Activities Related to Real Estate	87	33	8	41	46
4931	Warehousing and Storage	56	3	1	4	43
8111	Automotive Repair and Maintenance	41	(17)	16	(1)	42
3115	Dairy Product Manufacturing	39	(6)	6	-	39
7121	Museums, Historical Sites, and Similar Institutions	46	1	1	2	39
4471	Gasoline Stations	27	(31)	24	(7)	34
5611	Office Administrative Services	40	5	2	7	33
8131	Religious Organizations	33	(13)	16	3	31
5311	Lessors of Real Estate	147	99	19	118	29
5111	Newspaper, Periodical, Book, and Directory Publishers	(3)	(43)	11	(32)	29
<b>Total</b>		<b>1,620</b>	<b>(533)</b>	<b>2,265</b>	<b>1,732</b>	<b>(112)</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
 \* Employment in 2003 was less than 10 so the 2003-2013 change is based on zero employment in 2003.

North Country

NAICS	Description	2003-2013 Employment Change	Industry Mix Effect	National Growth Effect	Expected Change	Regional Competitive Effect
9012	Federal Government, Military	7,430	(1,414)	1,218	(196)	7,627
4529	Other General Merchandise Stores	2,124	318	114	432	1,692
5239	Other Financial Investment Activities	1,825	1,038	82	1,120	705
1120	Animal Production	529	(365)	412	47	482
9011	Federal Government, Civilian	604	(326)	465	139	466
5312	Offices of Real Estate Agents and Brokers	655	140	101	241	413
5614	Business Support Services	508	21	74	95	413
5231	Securities and Commodity Contracts Intermediation and Brokerage	407	23	22	45	362
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	741	202	184	386	356
5617	Services to Buildings and Dwellings	865	400	172	572	293
2361	Residential Building Construction	(80)	(583)	234	(349)	269
3222	Converted Paper Product Manufacturing	150	(159)	45	(114)	263
5313	Activities Related to Real Estate	696	348	86	434	262
4471	Gasoline Stations	166	(237)	184	(53)	219
5311	Lessors of Real Estate	1,305	924	178	1,102	203
7211	Traveler Accommodation	331	(161)	301	140	191
3323	Architectural and Structural Metals Manufacturing	166	(50)	29	(21)	187
8134	Civic and Social Organizations	141	(123)	77	(46)	187
2382	Building Equipment Contractors	164	(198)	182	(16)	181
4854	School and Employee Bus Transportation	198	5	18	23	174
5419	Other Professional, Scientific, and Technical Services	484	177	135	312	172
2362	Nonresidential Building Construction	78	(178)	98	(80)	158
8111	Automotive Repair and Maintenance	149	(143)	136	(7)	156
4931	Warehousing and Storage	252	77	22	99	154
4481	Clothing Stores	228	8	81	89	138
<b>Total</b>		<b>15,066</b>	<b>(6,026)</b>	<b>20,974</b>	<b>14,948</b>	<b>119</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Upstate New York

NAICS	Description	2003-2013 Employment Change	Industry Mix Effect	National Growth Effect	Expected Change	Regional Competitive Effect
5239	Other Financial Investment Activities	70,465	50,403	3,966	54,369	16,096
5231	Securities and Commodity Contracts Intermediation and Brokerage	10,111	1,288	1,234	2,522	7,589
9012	Federal Government, Military	5,938	(4,118)	3,546	(572)	6,510
5313	Activities Related to Real Estate	19,872	11,139	2,745	13,884	5,988
2361	Residential Building Construction	869	(7,934)	3,188	(4,746)	5,615
5614	Business Support Services	7,435	689	2,430	3,119	4,316
4529	Other General Merchandise Stores	13,302	6,994	2,500	9,494	3,808
5312	Offices of Real Estate Agents and Brokers	9,642	3,870	2,799	6,669	2,973
7132	Gambling Industries	2,591	16	72	88	2,504
6244	Child Day Care Services	7,616	341	4,875	5,216	2,400
4521	Department Stores	(3,571)	(10,282)	4,335	(5,947)	2,375
3339	Other General Purpose Machinery Manufacturing	2,024	(1,328)	1,022	(306)	2,330
6239	Other Residential Care Facilities	2,095	(1,110)	913	(197)	2,292
2383	Building Finishing Contractors	(3,841)	(10,151)	4,064	(6,087)	2,246
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities	8,510	3,401	3,098	6,499	2,010
3222	Converted Paper Product Manufacturing	(771)	(3,347)	955	(2,392)	1,621
8111	Automotive Repair and Maintenance	1,417	(3,236)	3,074	(162)	1,579
2382	Building Equipment Contractors	965	(5,600)	5,130	(470)	1,434
3115	Dairy Product Manufacturing	1,347	(797)	741	(56)	1,402
7222	Limited-Service Eating Places	18,550	9,200	7,960	17,160	1,389
3323	Architectural and Structural Metals Manufacturing	801	(1,264)	732	(532)	1,334
3342	Communications Equipment Manufacturing	(33)	(1,771)	458	(1,313)	1,281
3399	Other Miscellaneous Manufacturing	(425)	(2,586)	1,065	(1,521)	1,096
4422	Home Furnishings Stores	(308)	(2,166)	802	(1,364)	1,057
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	(303)	(2,948)	1,618	(1,330)	1,027
<b>Total</b>		<b>246,726</b>	<b>9,843</b>	<b>446,612</b>	<b>456,455</b>	<b>(209,729)</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Occupation Analysis

In addition to looking at employment by industry, Camoin Associates analyzed employment by occupation. Occupations refer not to the product or service being provided, but by the defined set of tasks of the employee in question. Occupations are classified using the Standard Occupational Classification (SOC) system. This is the system used by Federal statistical agencies to classify workers into one of 840 occupational categories. For more detail on occupations and the “Standard Occupational Classification” system (SOC), we refer the reader to <http://www.bls.gov/soc/>.

All occupation data for this report was collected from EMSI Complete Employment.

Occupational data are helpful in evaluating how the skills, education, and certifications of a particular community’s residents match up with the area’s occupational needs of the future. The report identifies the top occupations and fastest-growing occupations within each community.

The following tables contain the results of the occupation analysis including employment in occupations at the 2-digit level and the top 25 largest occupations at the 5-digit level.

From the occupation analysis, we find the following:

- The two largest occupations in all three geographies include Sales and Related Occupations and Office and Administrative Support Occupations.
- The only large difference between Franklin County and the North Country is in the Military Occupations classification. Employment at Fort Drum, a large military installation in Watertown (Jefferson County), is the primary reason for this difference.
- At the 5-digit level, the largest occupation in Franklin County is employees classified as Correctional Officers and Jailers. Employees in this occupation earn approximately \$57,000 each year which is higher than the average earnings for the county of \$49,400.
- Very few of the top occupations in Franklin County require more than a high school diploma or GED. The few that require more include: Registered Nurses, Teacher Assistants, Postsecondary Teachers, and Elementary School Teachers.
- The largest occupation in Upstate NY is Retail Salespersons followed by Cashiers.
- The Annual Openings column highlights includes a combination of new job growth and replacement jobs that result from retirement and other turnover. Occupations with a high number of annual openings could suggest an opportunity for training or other programs to prepare unemployed people for that occupation. In Franklin County, the occupation with the highest number of openings is the Correctional Officers occupation (even including all occupations beyond the top 25).

Largest Occupations							
SOC	Description	Franklin County		North Country		Upstate New York	
		2013 Occupations	% of All Jobs	2013 Occupations	% of All Jobs	2013 Occupations	% of All Jobs
11-0000	Management Occupations	1,740	7%	13,856	6%	279,395	6%
13-0000	Business and Financial Operations Occupations	874	4%	7,806	4%	267,771	6%
15-0000	Computer and Mathematical Occupations	167	1%	1,448	1%	89,128	2%
17-0000	Architecture and Engineering Occupations	171	1%	1,391	1%	60,422	1%
19-0000	Life, Physical, and Social Science Occupations	216	1%	1,565	1%	44,703	1%
21-0000	Community and Social Service Occupations	765	3%	3,647	2%	77,140	2%
23-0000	Legal Occupations	217	1%	1,170	1%	42,573	1%
25-0000	Education, Training, and Library Occupations	1,822	8%	14,204	6%	316,290	7%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	453	2%	4,789	2%	142,817	3%
29-0000	Healthcare Practitioners and Technical Occupations	1,314	6%	11,057	5%	247,129	5%
31-0000	Healthcare Support Occupations	830	3%	6,280	3%	130,863	3%
33-0000	Protective Service Occupations	1,828	8%	7,163	3%	104,765	2%
35-0000	Food Preparation and Serving Related Occupations	1,366	6%	15,220	7%	306,469	7%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	1,032	4%	8,699	4%	176,528	4%
39-0000	Personal Care and Service Occupations	1,421	6%	10,910	5%	234,622	5%
41-0000	Sales and Related Occupations	2,382	10%	25,595	12%	594,180	13%
43-0000	Office and Administrative Support Occupations	3,306	14%	27,045	12%	655,914	14%
45-0000	Farming, Fishing, and Forestry Occupations	244	1%	2,305	1%	20,801	0%
47-0000	Construction and Extraction Occupations	1,243	5%	10,083	5%	188,416	4%
49-0000	Installation, Maintenance, and Repair Occupations	814	3%	7,819	4%	156,685	3%
51-0000	Production Occupations	531	2%	8,444	4%	218,137	5%
53-0000	Transportation and Material Moving Occupations	995	4%	10,717	5%	224,741	5%
55-0000	Military occupations	83	0%	19,408	9%	40,818	1%
99-0000	Unclassified Occupation	74	0%	727	0%	19,116	0%
<b>Total</b>		<b>23,888</b>	<b>100%</b>	<b>221,349</b>	<b>100%</b>	<b>4,639,423</b>	<b>100%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

SOC	Description	Largest Occupations					Education Level Required
		2013 Occupations	% of All Jobs	Annual Openings	Median Hourly Earnings		
33-3012	Correctional Officers and Jailers	1,152	5%	35	\$ 56,960	High school diploma or equivalent	
11-9013	Farmers, Ranchers, and Other Agricultural Managers	526	2%	14	\$ 22,860	High school diploma or equivalent	
41-2011	Cashiers	526	2%	24	\$ 17,580	Less than high school	
39-9021	Personal Care Aides	507	2%	9	\$ 20,660	Less than high school	
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	506	2%	11	\$ 28,920	High school diploma or equivalent	
41-2031	Retail Salespersons	492	2%	28	\$ 22,420	Less than high school	
43-9061	Office Clerks, General	489	2%	13	\$ 25,120	High school diploma or equivalent	
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	485	2%	19	\$ 23,740	Less than high school	
29-1141	Registered Nurses	448	2%	17	\$ 59,040	Associate's degree	
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	351	1%	21	\$ 19,240	Less than high school	
39-9011	Childcare Workers	323	1%	15	\$ 13,820	High school diploma or equivalent	
41-9022	Real Estate Sales Agents	311	1%	15	\$ 22,820	High school diploma or equivalent	
47-4051	Highway Maintenance Workers	310	1%	6	\$ 36,460	High school diploma or equivalent	
43-3031	Bookkeeping, Accounting, and Auditing Clerks	304	1%	6	\$ 31,280	High school diploma or equivalent	
31-1011	Home Health Aides	302	1%	10	\$ 20,820	Less than high school	
25-9041	Teacher Assistants	301	1%	8	\$ 19,460	Some college, no degree	
41-1011	First-Line Supervisors of Retail Sales Workers	297	1%	12	\$ 26,280	High school diploma or equivalent	
25-3098	Substitute Teachers	255	1%	6	\$ 22,320	N/A	
25-1099	Postsecondary Teachers	248	1%	13	\$ 72,020	Doctoral or professional degree	
49-9071	Maintenance and Repair Workers, General	248	1%	8	\$ 31,960	High school diploma or equivalent	
35-3031	Waiters and Waitresses	242	1%	13	\$ 17,360	Less than high school	
25-2021	Elementary School Teachers, Except Special Education	241	1%	8	\$ 48,620	Bachelor's degree	
37-2012	Maids and Housekeeping Cleaners	237	1%	11	\$ 21,360	Less than high school	
43-5081	Stock Clerks and Order Fillers	231	1%	8	\$ 18,980	Less than high school	
43-1011	First-Line Supervisors of Office and Administrative Support Workers	217	1%	7	\$ 46,680	High school diploma or equivalent	

Franklin County

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
 \* Median hourly earnings multiplied by 2,000 hours

Largest Occupations						
SOC	Description	2013 Occupations	% of All Jobs	Annual Openings	Median Hourly Earnings	Education Level Required
55-9999	Military occupations	19,408	9%	3	\$ 32,800	N/A
41-2031	Retail Salespersons	6,207	3%	310	\$ 21,520	Less than high school
41-2011	Cashiers	4,938	2%	256	\$ 17,800	Less than high school
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	3,972	2%	210	\$ 17,300	Less than high school
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3,934	2%	126	\$ 22,320	Less than high school
33-3012	Correctional Officers and Jailers	3,781	2%	105	\$ 57,040	High school diploma or equivalent
11-9013	Farmers, Ranchers, and Other Agricultural Managers	3,757	2%	69	\$ 23,160	High school diploma or equivalent
43-9061	Office Clerks, General	3,744	2%	90	\$ 25,220	High school diploma or equivalent
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3,720	2%	64	\$ 29,180	High school diploma or equivalent
29-1141	Registered Nurses	3,503	2%	103	\$ 59,040	Associate's degree
41-9022	Real Estate Sales Agents	3,152	1%	141	\$ 23,900	High school diploma or equivalent
35-3031	Waiters and Waitresses	3,007	1%	163	\$ 17,520	Less than high school
39-9011	Childcare Workers	2,950	1%	148	\$ 12,920	High school diploma or equivalent
39-9021	Personal Care Aides	2,836	1%	69	\$ 21,100	Less than high school
41-1011	First-Line Supervisors of Retail Sales Workers	2,806	1%	98	\$ 27,860	High school diploma or equivalent
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,588	1%	42	\$ 31,400	High school diploma or equivalent
43-5081	Stock Clerks and Order Fillers	2,539	1%	84	\$ 18,540	Less than high school
25-9041	Teacher Assistants	2,384	1%	63	\$ 19,380	Some college, no degree
37-2012	Maids and Housekeeping Cleaners	2,259	1%	90	\$ 18,940	Less than high school
53-3032	Heavy and Tractor-Trailer Truck Drivers	2,179	1%	46	\$ 31,740	Postsecondary non-degree award
31-1014	Nursing Assistants	2,109	1%	63	\$ 24,120	Postsecondary non-degree award
49-9071	Maintenance and Repair Workers, General	2,108	1%	53	\$ 34,580	High school diploma or equivalent
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,086	1%	86	\$ 26,680	Less than high school
47-2031	Carpenters	2,064	1%	43	\$ 31,600	High school diploma or equivalent
25-3098	Substitute Teachers	2,015	1%	41	\$ 22,580	N/A

North Country

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
\* Median hourly earnings multiplied by 2,000 hours

Upstate NY

Largest Occupations						
SOC	Description	2013 Occupations	% of All Jobs	Annual Openings	Median Hourly Earnings	Education Level Required
41-2031	Retail Salespersons	134,104	3%	5,859	\$ 21,280	Short-term on-the-job training
41-2011	Cashiers	94,648	2%	4,599	\$ 17,740	Short-term on-the-job training
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	89,866	2%	3,127	\$ 23,960	Short-term on-the-job training
43-9061	Office Clerks, General	87,709	2%	2,262	\$ 25,780	Short-term on-the-job training
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	86,664	2%	1,683	\$ 31,780	Short-term on-the-job training
41-9022	Real Estate Sales Agents	86,295	2%	3,559	\$ 32,000	Long-term on-the-job training
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	81,065	2%	4,564	\$ 17,440	Short-term on-the-job training
29-1141	Registered Nurses	74,631	2%	2,275	\$ 60,820	None
43-4051	Customer Service Representatives	62,366	1%	2,350	\$ 29,920	Short-term on-the-job training
39-9011	Childcare Workers	60,947	1%	3,160	\$ 16,500	Short-term on-the-job training
35-3031	Waiters and Waitresses	58,882	1%	3,463	\$ 18,060	Short-term on-the-job training
13-2052	Personal Financial Advisors	58,590	1%	4,964	\$ 67,340	None
43-3031	Bookkeeping, Accounting, and Auditing Clerks	56,974	1%	1,061	\$ 34,000	Moderate-term on-the-job training
43-5081	Stock Clerks and Order Fillers	54,553	1%	1,752	\$ 19,680	Short-term on-the-job training
25-9041	Teacher Assistants	53,683	1%	1,444	\$ 23,140	None
25-1099	Postsecondary Teachers	53,541	1%	1,553	\$ 69,620	None
39-9021	Personal Care Aides	52,429	1%	1,820	\$ 22,220	Short-term on-the-job training
41-1011	First-Line Supervisors of Retail Sales Workers	49,476	1%	1,541	\$ 30,440	None
11-1021	General and Operations Managers	47,275	1%	1,327	\$ 89,360	None
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	45,264	1%	1,911	\$ 25,080	Short-term on-the-job training
31-1014	Nursing Assistants	44,653	1%	1,470	\$ 26,220	None
13-2011	Accountants and Auditors	42,854	1%	1,736	\$ 59,700	None
43-1011	First-Line Supervisors of Office and Administrative Support Workers	42,529	1%	1,330	\$ 48,680	None
31-1011	Home Health Aides	41,645	1%	2,199	\$ 21,860	Short-term on-the-job training
55-9999	Military occupations	40,818	1%	6	\$ 32,700	N/A

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker  
\* Median hourly earnings multiplied by 2,000 hours

## Attachment B – Relevant Cluster Analysis





# Relevant Cluster Analysis

*for*


## Franklin County

November 2014

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## Executive Summary

### Introduction

An important part of the Comprehensive Economic Development Strategy is the identification of a few relevant clusters that are important to the region and research into trends that impact the role that each cluster plays in the region. For Franklin County, these relevant clusters were identified following a review of the economic base analysis, interviews, research into existing plans and documents, and our understanding of Franklin County and the North Country of New York State.

Camoin Associates worked with the Steering Committee and the Franklin County IDA to identify five relevant clusters that are considered important to the county's economy and warranted further data collection and research. These relevant clusters include:

- Agriculture & Food Processing
- Environmental Science & Biotechnology
- Forestry & Wood Products
- Health Care & Wellness
- Tourism, Culture & Recreation

The following is a summary of the information gleaned from the research conducted on the relevant clusters. More information is available in the full report and appendices.

### Relevant Clusters

The following is a summary of the findings of the relevant cluster research with a particular focus on how the changes in the industries will impact Franklin County.

#### Agriculture & Food Processing

The agribusiness industry in Franklin County has benefited over the years from abundant land, quality soil, major employers, and income growth. Overall, the cluster is expected to continue to grow over the next 10 years; however, the rate of growth will be significantly lower than the rate the county has enjoyed in the past. This growth pattern mirrors what is occurring at the national level. Despite favorable past and future growth projections, this industry faces significant changes and challenges moving forward.

While farm production and profits are expected to continue to grow, technology and process automation will decrease the industry's reliance on employees but require a heavier investment in machinery and equipment. In the future, farm owners and managers will increase output without the need for additional employees. Franklin County's Agriculture Cluster must be prepared for these changes. As technology becomes an increasingly important part of the agriculture industry, the jobs created will no longer be low skilled jobs but ones that require not only knowledge of farming practices but also advanced technology skills. Farms that are unable to invest in these new technologies will find it increasingly difficult to compete as larger operations scale in size and efficiencies.

In addition to this trend towards automation and consolidation, consumers are also demanding niche, hand-crafted, and locally-sourced agricultural products. These markets present an opportunity for small

farms to continue to capture a portion of the agriculture market and fetch a high price for well-made goods.

Franklin County's agriculture industry is also hindered by the lack of food processing facilities, including slaughterhouses, which are necessary to convert raw agricultural goods into value-added products. This challenge has been identified by the North Country REDC as one that is hindering economic growth throughout the entire region. Creative solutions will be required to address this challenge as there are few places in the North Country with enough demand for a food processing facility and the expense of establishing one is high. One example of a solution that was funded by the North Country REDC in 2013 is a mobile poultry processing facility based in St. Lawrence County. Franklin County entrepreneurs should be at the forefront of creating solutions like this one to address this regional need.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Agribusiness and Food Processing Cluster that:

- Focus on ways to increase profitability for existing farmers through techniques for extending the growing season, increasing productivity, expanding the market, and identifying niche markets and value-added processing techniques.
- Look into the feasibility of a "Food Hub" that provides county residents with access to a single place to process and market their foods. A large greenhouse on-site could help farmers extend their season without having to invest in the infrastructure on their own.
- Find ways to coordinate and incorporate best management practices for farmers to be able to respond to changing legislation and environmental concerns.
- Establish an outlet for those in the industry to express issues they are facing in their business in a productive environment that encourages problem solving and solution development.
- Development of the Franklin County brand and name recognition for products and goods produced in the county.
- Support the development of agri-tourism and "farm experience" tourism including the creation of wine/beer/food trails, packaging of deals between B&Bs and farms, experience packages that teach visitors how to cook with local food.
- Ensure access to financing is available for those farms that want to invest, grow and survive.
- Research feasibility of shrub willow and other crops for use as a biofuel input.

### Environmental Science & Biotechnology

For a small community, Franklin County boasts significant history in health care research and an array of impressive research institutions and higher education institutions focused on environmental and scientific research. However, since the recession began, this cluster has suffered from significant job losses, reducing the workforce in the sector by nearly 50%. To maintain and grow this cluster in the community, Franklin County has to promote entrepreneurship, innovation, and collaboration.

Paul Smith's College and Trudeau Institute are pillars of this industry cluster. As an education institution, Paul Smith's provides education in fields relevant to this industry. While students are being educated in these fields at Paul Smith's facilities, the jobs may not be available to keep those trained students in the area. Providing additional opportunities for entrepreneurship while these students are in college could connect them to the area and perhaps prompt them to start their own business in the region. Providing this entrepreneurial support will require collaboration across a range of stakeholders, including existing

businesses, educational institutions, entrepreneur mentors, financial institutions, and government involvement.

The Trudeau Institute has been conducting cutting edge research for 130 years. This research asset is essential to attracting and encouraging new biotechnology startups in the region. The history and reputation of Trudeau and the biotechnology cluster emerging in the Saranac Lake region can be used to encourage the growth of this sector.

By leveraging opportunities and trends in New York and the North Country, including growing interest in clean energy, energy efficiency, and environmental awareness, Franklin County can encourage the creation or expansion of firms focused on these emerging trends. Several overarching projects identified in the North Country Sustainability Plan require environmental science expertise that could be provided by entrepreneurs, former students, and businesses from Franklin County.

Capitalizing on any trends in this cluster will require forward thinking and non-traditional strategies that incorporate multiple stakeholders and partners.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Environmental Science and Biotechnology Cluster that:

- Line up with strategic priorities identified in the North County Regional Economic Development Council's strategic plan including: identifying barriers to entry in the biotech cluster, provide expansion space for existing and/or early-stage companies, utilize equipment and capacity at Trudeau Institute, and establish a funding source to assist biotech businesses.
- Establish an industry specific task force to guide growth of the environmental science and biotech cluster.
- Facilitate collaboration between the environmental and biotechnology clusters throughout northern New York. The focus for Franklin County will be to bring together environmental science researchers, local businesses, educational institutions (universities, colleges and others such as the Wild Center and VICs), state, and other environmental agencies and environmental advocates to discuss how they can work together to foster the creation and commercialization of practical solutions to environmental problems.

## Forestry & Wood Products

The Forestry and Wood Products Cluster in Franklin County shares many of the difficulties faced by this industry throughout the nation. The market for forestry products faces stiff competition from foreign imports and alternatives. Paper use has steadily declined as more and more activity occurs online and new paper stock is created from recycled materials. In addition, the markets are uncertain and fluctuate with national and global economic trends and the inputs are becoming increasingly expensive. While the cluster continues to employ nearly 300 people in Franklin County, it has been declining for many years and is projected to continue to shed jobs. Despite these weaknesses, the Forestry and Wood Products Cluster continues to be an important economic driver to Franklin County, the region, and the state and has been identified as a strategic priority in the North Country REDC's strategic plan.

One of the greatest opportunities for growth in this industry is the growing market for renewable biomass fuel, including wood pellet production. The North Country REDC has identified biomass production as one of its strategies to economic growth in the North Country. However, in order for

Franklin County to benefit from this increased demand, it needs facilities to process the raw wood into wood pellets or chips and customers to purchase the wood biomass. In the North Country, there is a market for wood pellets due to the region's reliance on heating oil and the lower cost and price stability of this biofuel. In order for customers to use this fuel source effectively, high-efficiency boiler technology must replace older heating systems. Some schools in the region have already made this conversion and found considerable savings. In addition to the regional market, the European Union imports a considerable amount of wood biomass.

In addition to challenges with lower and inconsistent demand, the forestry industry is being challenged by an aging workforce, aging business owners, increasing parcelization of forest tracts, and development of forest land for other uses. To better understand the future of its forestry industry, Franklin County should regularly communicate with forestry land and business owners to gather information about the future of the industry and provide information about potential new programs, initiatives, or tax reforms.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Forestry and Wood Products Cluster that:

- Identify ways to help transition existing producers into more competitive markets such as wood pellets or other biofuels.
- Grow the supply chain and support industries related to the use of wood pellets for heating fuel. Provide education and assistance to residents interested in transitioning to biofuels for commercial and residential properties.
- Work with schools and other major energy users to consider whether transitioning to wood pellets would offer them a cost savings for their heating needs.
- Continue to support and expand training programs that relate to the forestry industry including programs at Paul Smith's. Develop training programs that will help existing employees transition along with the changing industry trends.
- Improve competitiveness through strategic partnerships, cooperative equipment purchasing, targeted tax abatement programs and other tools to return forestry to a viable industry for Franklin County.
- Incorporate wood products into overall marketing strategy for goods made in Franklin County. Consider development of a certification program to ensure high quality goods are associated with the "Franklin County" brand and the values of the Adirondacks.

## Health Care & Wellness

On the national level, the health care industry is facing challenges and new opportunities resulting from dramatic demographic shifts in the population, regulatory changes due to the Affordable Care Act (ACA), and the fast pace of technological innovation. Health care insurers and providers are finding new ways to collaborate and integrate to improve services to patients, implementing new technology to improve care and reduce the need for hospital readmissions, and adhering to the new requirements of the ACA.

The health care industry in Franklin County must also adapt to the new realities of this important employer. Integration within the health care industry is becoming increasingly common to increase purchasing power, provide a broader range of services, eliminate duplicate services, and reduce costs. Franklin County health care industry should continue to strengthen strategic partnerships both within and beyond the borders of the county that would improve the quality and cost competitiveness of the

care provided. Traditional health care providers will also be challenged by new entrants to the industry as well as established firms expanding their range of services.

In addition to increased integration, new technology will increasingly play a role in the diagnostic and treatment of diseases, requiring physicians and hospitals to be flexible and adaptable to these changes. As the ability to provide diagnosis and treatment from remote locations becomes more widely utilized, patients will be able to choose from providers across the globe. While this could be an improvement in the quality of care provided, it puts individuals employed in this industry in Franklin County at risk of being displaced by practitioners in other parts of the country. To ensure continued viability of the health care industry, Franklin County providers must remain on the cutting edge of medical technology procedures and technology, providing the best quality care to residents of the country and perhaps beyond.

In addition to traditional health care providers, the Health Care & Wellness Cluster also includes sectors focused on providing long-term health solutions and opportunities for healthy living. These sectors include fitness, diet, spas, and other wellness services. The health care industry is increasingly focused on including these types of services into prescriptions for care. In the future, a dynamic and integrated health care industry will have to include robust sectors of the peripheral services.

While the importance of the health care sector is clear in terms of the jobs and other economic benefits to the community, it also has a significant impact on the overall quality of life experienced by the residents of a community. Without access to health and wellness amenities, residents will experience discomfort and risk acquiring a chronic disease, such as diabetes or hypertension. Health and wellness assets are critical to ensuring an exceptional quality of life to the community's residents and the ability to attract and retain new residents.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Health Care and Wellness Cluster that:

- Work with community colleges and K-12 to direct people into health care jobs to fill growing demand for CNAs and other health care professionals.
- Develop a system to help connect trailing spouses with employment opportunities. Create a network to increase community engagement and encourage people to relocate and stay in Franklin County.
- Continue to support investments in health care technology for Alice Hyde Medical Center and other health care providers to increase services provided and ability to collaborate within the northeastern network of providers.
- Find ways to educate residents about the importance of wellness care as preventive medicine.

### Tourism, Culture & Recreation

The tourism industry has become increasingly important to the United States' economy. The industry was one of the first to recover from the recent recession and is considered one of the country's largest exports. In addition to its importance on the national level, the tourism industry has become integral to the economic development strategies of communities throughout the country.

Franklin County is poised to take advantage of many new trends in the tourism industry, including a growing interest in outdoor recreation, wellness tourism, and a desire for "authentic" experiences that

could not be replicated elsewhere. Franklin County's rural and small town nature and proximity to the Adirondacks will attract visitors interested in enjoying nature and the outdoors. Tupper Lake, Saranac Lake, and the St. Regis Reservation are already huge drivers of tourism to the region, each offering unique visitor experiences. Tourism interest could be expanded to other parts of the county by capitalizing on interest in agri-tourism, which would further support the agriculture industry and local food production.

With its history of providing natural health services to people suffering from ailments such as tuberculosis, Franklin County is uniquely positioned to capitalize on the "wellness tourism" trend. While this niche tourism market includes strictly wellness oriented facilities such as spas and yoga retreats, it also includes travelers who are interested in having active, healthy-conscious vacations, including engaging in outdoor activities and eating local, fresh, healthy foods, amenities that can be provided by Franklin County's unique characteristics.

While the tourism industry can bring many benefits to a community, it cannot be relied upon solely for economic development. The majority of the positions created in the industry are low-wage and low-skilled and many are part-time or seasonal.

A community's investment in tourism pays dividends not only through the new visitors it attracts, but also by improving the quality of life of residents who will also be able to enjoy new amenities.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Tourism, Culture and Recreation Cluster that:

- Develop amenities and facilities that appeal to tourists looking for a combination of adventure and wellness.
- Conduct a comprehensive visitor survey to better identify and target specific traveler markets.
- Use existing tourism amenities through multiple seasons to reduce seasonality of the tourism industry.
- Build on the wellness and health values of the Adirondacks and historic focus in Saranac Lake.
- Build on the educational experiences available in the Adirondacks through the use of outdoor excursions with options for a range of abilities.
- Find ways to support entrepreneurs entering the tourism industry through technical and financial assistance, networking opportunities, training, and cooperative marketing efforts.
- Study the feasibility of developing a location for youth athletics and other athletic events.
- Provide technical and financial assistance to students of Paul Smith's School of Commercial, Applied and Liberal Arts hospitality programs who are interested in starting their own business. Create a culture of entrepreneurship that extends to college students through recreation/tourism focused business competitions, business training programs and networking events.
- Develop a tourism industry financing program in partnership with public and private sources to incentivize investments in lodging, recreation and food service establishments.



## Introduction

As part of the research for the Comprehensive Economic Development Strategy (CEDS), a relevant cluster and industry sector analysis was conducted to identify industries that are in some way significant and/or relevant to the Franklin County economy. Information gained from this research will be used to inform the planning process and will further refine strategies, initiatives, and projects in the economic development plan.

Michael Porter of the Harvard Business School defines industry clusters as:

*“geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region. Clusters arise because they increase the productivity with which companies can compete.”<sup>1</sup>*

An understanding of, and support for clusters is an important role for governments and economic development professionals because clusters build on existing strengths and grow the global competitive advantage of a community, region, or state to attract additional investment.

High performing, dense economic clusters are ideals that are often not achieved and when they are they are rarely subject to geopolitical boundaries such as counties. They also are less typical in rural areas due to lack of density. Therefore, rather than focus on whether something is truly a cluster, for this analysis we examine groupings of industry sectors and sub-sectors, and based on employment size, growth, historical strength, and concentration, assess the extent to which there may be cluster characteristics in Franklin County’s economy and opportunities among the sectors for growth.

Industry sectors and subsectors typically do not perform high on all these characteristics. Some exhibit high growth in employment but may be less concentrated than other sectors. These are typically potential “emerging clusters” which, through continued growth, will become more concentrated. In Franklin County these “emerging clusters” include environmental sciences and tourism. Others are highly concentrated but may not be currently growing. These typically are a county’s “legacy” industries and through innovation or transformation may be able to increase future growth rates. In Franklin County examples of these “legacy” clusters include forestry and agriculture.

## Identifying Relevant Clusters

As the first step in the analysis, Camoin Associates reviewed the information contained in the Economic Base Analysis conducted for the CEDS to identify clusters that might offer opportunities for the county. These initial clusters were reviewed and discussed with the CEDS Committee for input for further consideration.

Then, Camoin Associates conducted additional assessments of the initial clusters and industries to further narrow down the clusters for more detailed, focused analysis. This selection was based on industry performance within the clusters in terms of:

- Size of the industry employment relative to all industries

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<sup>1</sup> Porter, M. (2014, August). *Cluster Studies*. Retrieved from Harvard Business School: <http://www.isc.hbs.edu/competitiveness-economic-development/research-and-applications/Pages/cluster-studies.aspx>

- Historical employment growth
- Projected employment growth
- Concentration (as measured by location quotient)
- Competiveness (as measured by shift-share analysis)

From that review, five relevant clusters were selected for further research. The clusters assessed in detail, referred to as the “relevant clusters,” include:

- Agriculture & Food Processing
- Tourism, Culture & Recreation
- Forestry & Wood Products
- Health Care & Wellness
- Environmental Sciences & Biotechnology

For each of the five clusters, additional market research was conducted to provide a deeper understanding of opportunities. This resulting report includes: a definition of the selected clusters including all North American Industrial Classification System (“NAICS”) codes included at the 6-digit level, historic and projected employment, national location quotient, information about the 20 largest occupations within the cluster, and findings from the market research.

## Assessing the Relevant Clusters

Once the relevant clusters were identified, Camoin Associates worked to define each cluster by selecting specific industries - using six-digit NAICS codes – that when grouped together represent each cluster. Clusters can be defined in a variety of ways, so Camoin Associates drew on information gathered from the review of previous documents, past experience working in the northeast, the Economic Base Analysis report completed for this project, and standard definitions to determine which NAICS codes to include in each of the five clusters.

Once the clusters and their NAICS codes were defined, Camoin Associates conducted data collection and analysis. This involved gathering industry and occupation data and looking at trends from 2003 to 2013 and projections through 2023. This information allowed Camoin Associates to better understand employment and occupation trends within each of the clusters as well as opportunities that may lie in the future. The data analysis includes existing size, growth projections, and an assessment of the overall size and nature of the occupations in each cluster.<sup>2</sup> Additionally, Camoin Associates looked at the size of establishments as a way to better understand the types of companies that make up the individual clusters<sup>3</sup>. This information provided for a comprehensive understanding of the existing conditions in Franklin County and what is likely to happen in the future that would impact the economy.

Finally, Camoin Associates conducted market research on each of the relevant clusters to better understand what is occurring nationally for these clusters and the specific industries within the clusters. This provided information on the factors that drive location decisions, the trends professionals are seeing within the clusters, and the opportunities for Franklin County to further capitalize on these clusters.

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<sup>2</sup> Annual wages are provided based on median hourly wages multiplied by 2,000 annual hours worked.

<sup>3</sup> The average establishment size information may be skewed as a result of a few very large companies within a cluster but it can still be useful background information for the analysts.

## Presentation of the Data

Most of the data presented in this report are broken down first into the relevant clusters and then further into the industry sectors that make up the clusters, organized using the North American Industrial Classification System (“NAICS”). Occupational data is reported based on the federal system of classifications referred to as the Standard Occupational Classification (“SOC”). NAICS and SOC codes are classification codes that are used nationally to group industries and occupations into similar categories from low to high levels of specificity. All data on wages by SOC code represent annual “median” wages.

## Data Sources

Cluster establishment, employment, and occupation data used in this analysis is provided by [Economic Modeling Specialists](#), Intl. (“EMSI”). EMSI combines employment data from the Quarterly Census of Employment and Wages (“QCEW”) produced by the Department of Labor with data from the Regional Economic Information System (“REIS”) published by the Bureau of Economic Analysis (“BEA”) and augmented with County Business Patterns (“CBP”) and Nonemployer Statistics (“NES”) published by the U.S. Census Bureau.

Projections are made by EMSI and are statistical projections based on the latest available EMSI industry data combined with past trends in each industry, national growth rates of industries, and data from the Bureau of Labor Statistics. EMSI creates long-term, 10-year industry projections starting from the current year (2013 for this particular report). Note that projections are not “predictions” and projected job growth, for example, is not the same thing as “demand”.

The data used is EMSI’s “complete employment” data set, which includes both covered and uncovered jobs.<sup>4</sup> In other words, it includes both traditional employment and non-traditional employment such as the self-employed (self-employed includes sole proprietorships and partnerships). As traditional jobs have been replaced or augmented by freelance work, consulting, and self-employment, these non-covered jobs have become much more important to the economy and EMSI provides researchers with a way to track these trends over time.

Market research was conducted using a variety of sources including previous reports and documents, industry and economic development research from the Web, and data was collected from Hoovers for select industries. Note that the information in the market research section must continue to rely on projections for 2013 because all information about revenues are not yet reported; therefore, some of the wording may reflect estimates or projections through 2013. Information for company examples in the various clusters is pulled from Business Analyst Online by ESRI, a service that maintains listings of businesses by their NAICS code. Sources are cited as used.

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<sup>4</sup> Jobs covered by unemployment insurance are tracked by the Bureau of Labor Statistics’ Quarterly Census of Employment and Wages. EMSI’s complete employment category uses Bureau of Economic Analysis data ([www.bea.gov/region/](http://www.bea.gov/region/)) as its primary benchmark. In addition to covered jobs taken care of by QCEW data, BEA data attempt to count all types of paid employment.

## Agribusiness & Food Processing Industry Cluster

### Introduction

The Agribusiness and Food Processing Industry Cluster, which is defined as the production, processing, and distribution of agricultural products, is an industry that has long played an important role in Franklin County. Agribusiness and Food Processing was identified as a relevant cluster because of the cluster's history and potential opportunities for the future based on changes in the industry including diversification, niche farming, and new technological advances that could make it more profitable for farmers. Historically, farmers in Franklin County have faced significant challenges including the consolidation of farms, lack of adequate processing facilities, and a general decrease in interest from the younger population. However, the industry continues to be one that is important to the values and economy for Franklin County residents.



*Franklin County Fair Sign  
Source: North Country Public  
Radio*

Selected Franklin County businesses in this industry include Agri-Mark, a major dairy producer for Cabot cheese; Tucker Farms, a family-owned farm producing New York State potatoes and hosting community events; and Atlas Hoofed It, a family-owned farm producing assorted meats and cage-free eggs.

The following section reviews global and national trends, summarizes findings from our research related to Agribusiness and Food Processing in Franklin County, and outlines how all of these trends relate to Franklin County in terms of potential opportunities and competitiveness. Additional data can be found in the appendix.

### Industry Background & Trends:

#### General

- Since 1997, the number of farms, acres of total cropland, and acres of harvested cropland have decreased steadily.<sup>5</sup> Over the same period, the market value of farm land, buildings, machinery, and equipment have increased and the market value of agricultural products sold has more than doubled. These statistics demonstrate the increasing consolidation of the US agriculture industry and the large investment in machinery and land required to compete.<sup>5</sup>
- Economic and population growth and urbanization in developing countries will likely lead to more diverse diets, including more meat and dairy products, providing an opportunity for exporting US agricultural products.<sup>6</sup>
- Demand for organic products outstrips supply, presenting an opportunity for Franklin County farmers.<sup>7</sup> There has also been a demonstrated demand for products with more natural and

<sup>5</sup> 2012 Agriculture Census Results. (2012). Retrieved from USDA Census of Agriculture: <http://www.agcensus.usda.gov/>

<sup>6</sup> USDA Agriculture Projections to 2023. (2014, February). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/media/1279470/oce141.pdf>

<sup>7</sup> US Department of Agriculture Economic Research Service. (2014, August). Retrieved from Agriculture Act of 2014 - Organic Agriculture: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/organic-agriculture.aspx#U-kanfidVEQ>

fewer GMO ingredients.<sup>8</sup> Opportunities exist for Franklin County producers to take advantage of credentialing as organic, eco-friendly, sustainable labels to stand out and increase recognition.<sup>9</sup>

- New York State is increasingly focused on promoting local products through its “Taste NY” program. The Taste NY program highlights New York made products, including beer, wine, and maple syrup.
- Technology is playing an increasingly important role in farming. Software and smartphones are used to communicate between field workers, managers, buyers, and suppliers. Modern farm workers need to be knowledgeable about farming practices and tech savvy.<sup>10</sup>
- While production has increased, automation of certain processes has decreased the number of employees farms require.<sup>10</sup>
- Land values, prices of corn and soy, and wages are at record highs in the US.<sup>10</sup>
- While remaining at a high level, US farm income is expected to decline from the record achieved in 2013.<sup>6</sup>

## Dairy

- Dairy production in the US reached a record high in 2012 with 57% of milk produced coming from dairy farms with at least 500 cows. These “mega” dairy farms are making it harder for smaller, less technologically sophisticated dairy farms to compete.<sup>11</sup>
- Dairy product exports are expected to increase steadily over the next decade.<sup>11</sup> The increased global demand for dairy products is tied to the popularity of dairy products, a “Westernization” of diets, and a broader array and appeal of dairy products to a global population. Mega farms with thousands of cows are becoming more common across the globe to handle the increase in dairy consumption.<sup>11</sup>
- Interestingly, overall consumption of dairy products has risen since 2009 while the consumption of fluid milk has declined since that year.<sup>11</sup>
- Trends in the dairy product market include a shift towards new products that satisfy a healthy and on-the-go lifestyle. Dairy producers indicate that “single serve, grab-n-go” packaging is the most important trend.<sup>11</sup> Other growing dairy product sectors include cheese, new flavors of ice cream and milk, by products (whey and other protein concentrates) and powdered milk.<sup>11</sup>

## Yogurt Production

- While lower than its peak in 1993, the number of yogurt plants has grown steadily in the US since 1999, reaching 131 plants in 2012.<sup>12</sup>
- Yogurt sales are expected to grow by 27% in the US from 2012 to 2017, mainly driven by demand for Greek yogurt.<sup>12</sup>
- The Greek yogurt market has become more crowded, leading to increased competition between brands at the supermarket.<sup>12</sup>

<sup>8</sup> The Association for Packaging and Processing Technologies. (2013, August). Retrieved from Research & Trends - Dairy Industry Market Assessment: <http://www.pmmi.org/files/Research/ExecutiveSummaries/2013DairyExecSummary.pdf>

<sup>9</sup> Innovation Center for US Dairy. (2012, August). *Executive Summary: The Future of Dairy*. Retrieved from Innovation Center for US Dairy: <http://www.usdairy.com/~media/usd/public/futureofdairyexecutivesummary.pdf.pdf>

<sup>10</sup> Bjerga, A. (2013, January 30). *Record Profits No Job Creator on Farms as Owners Automate*. Retrieved from Bloomberg News: <http://www.bloomberg.com/news/2013-01-30/record-profits-no-job-creator-on-farms-as-owners-automate.html>

<sup>11</sup> The Association for Packaging and Processing Technologies. (2013, August). Retrieved from Research & Trends - Dairy Industry Market Assessment: <http://www.pmmi.org/files/Research/ExecutiveSummaries/2013DairyExecSummary.pdf>

<sup>12</sup> Boynton, R. D., & Novakovic, A. M. (2013, October). *Industry Evaluations of the Status and Prospects for the Burgeoning New York Greek-style Yogurt Industry*. Retrieved from Program on Dairy Markets Policy: <http://dairymarkets.org/PubPod/Pubs/RP13-01.pdf>

- Disposal of “acid whey,” a byproduct of Greek yogurt production, is a major cost. Options include use as animal feed, soil nutrient, fuel, or as an input for other whey products. All options require additional processing and cost the yogurt processor additional money.<sup>12</sup>
- Yogurt plants consider several factors related to milk production when considering new plants and expansions, including density of milk production, number of plants competing for milk in the region, historic growth in production, and drivers of production growth.<sup>12</sup>
- Other important factors for siting a yogurt facility<sup>12</sup>:
  - Proximity to large market or to markets that are not saturated with yogurt options
  - Proximity to and favorable pricing or raw materials
  - Favorable factors related to disposal or treatment of manufacturing by-products
  - Tax incentives, shovel ready sites, supply of quality labor, availability of water and other infrastructure
- New major Greek yogurt facilities received tens of millions of dollars in incentives, including infrastructure upgrades, grants, tax abatements, and workforce training funds.<sup>13,14</sup>

## Breweries

- The number of breweries in the United States has jumped from 1,625 in 2010 to 3,040 in 2013 (an 87% increase). Furthermore, another 1,929 breweries are under development, the vast majority of which are small and independently owned craft beer producers.<sup>15</sup> The increased interest in craft beer and locally produced goods presents a variety of opportunities for Franklin County ranging from growing the inputs to supporting the development of breweries and beer trails in Franklin County.
- The growing craft beer market and new NYS regulations have created a growing market for hops and other beer inputs. Such regulations under the Farm Brewery License law that was signed in 2013 by Governor Cuomo will require an increasing percent of all beer inputs to be sourced from New York State in order for the product to market itself as “Made in New York”.<sup>16</sup> It is anticipated that this new legislation will spur increased demand for hops and other beer inputs since existing supply would be unable to meet the expected demand.

## Greenhouse Farming

- Growing vegetables in greenhouses can be an economically viable way to supply fresh produce to consumers outside of the typical growing season. During winter months, fresh produce commands a price premium that can justify the additional energy costs of having to climate-control greenhouses, as well as the significant upfront capital investment. Consumers are willing to pay more for the high quality that only greenhouse-grown crops can offer during this time.

<sup>13</sup> Saunders, E. R. (2012, December 17). *Chobani Opens Twin Falls Yogurt Facility Today, But at What Cost to Taxpayers*. Retrieved from State Impact - NPR: <https://stateimpact.npr.org/idaho/2012/12/17/chobani-opens-twin-falls-yogurt-facility-today-but-at-what-cost-to-taxpayers/>

<sup>14</sup> Glynn, M. (2012, September 15). *Batavia Gets Taste of Growth as Regional Appeal Helps Attract Yogurt Plants*. Retrieved from The Buffalo News: <http://www.buffalonews.com/apps/pbcs.dll/article?aid=/20120915/business/120919297/1005>

<sup>15</sup> Fitzgerald, B. (2014, August 14). *Glass Houses*. Retrieved from Times Union Newspaper: <http://www.timesunion.com/living/article/Glass-houses-5689249.php>

<sup>16</sup> In order to receive a Farm Brewery license, the beer must be made primarily from locally grown farm products. Until the end of 2018, at least 20% of the hops and 20% of all other ingredients must be grown or produced in New York State. From January 1, 2018 to December 31, 2023, no less than 60% of the hops and 60% of all other ingredients must be grown or produced in New York State. After January 1, 2024, no less than 90% of the hops and 90% of all other ingredients must be grown or produced in New York State. The beer manufactured under these guidelines would be designated as "New York State labeled beer." Source: <https://www.governor.ny.gov/press/07182012-craft-breweries>

- A greenhouse located proximate to major population centers has the competitive advantage of being able to deliver the freshest produce, as the products do not have to travel long distances to reach consumers.
- Some of the most common greenhouse crops include tomatoes, lettuce, peppers, cucumbers, herbs, and strawberries.

### Product Manufacturing

- Cigarette manufacturing, the second largest agribusiness sector in Franklin County, is projected to grow by 24% in Franklin County. However, in the United States as a whole, the sector is expected to decline by 64%.
- Food manufacturing is a \$750 billion industry in the United States with around 21,000 companies. The industry is highly concentrated with the 50 largest companies accounting for more than half of all industry revenue.<sup>17</sup>
- One challenge for the food manufacturing industry is the constantly changing health trends and the difficulty companies face responding these trends quickly. Technology has allowed companies to conduct research and development quickly and effectively allowing them to be flexible with changing consumer demand.<sup>17</sup>
- Worldwide there is an increasing demand for higher-value goods such as meat, dairy, fruits and vegetables and decreasing demand for “staples” such as rice and wheat.<sup>17</sup>
- Food processing facilities in the United States tend to locate near their input, particularly those processors that require inputs that are perishable. New York is a leading raw milk producer along with California, Wisconsin, Idaho and Pennsylvania.<sup>17</sup>
- One opportunity for food manufacturing companies is finding ways to have healthier offerings utilizing organic inputs. Low-sodium and whole wheat products have also gained popularity. Another opportunity is in redesigning packaging to be more environmentally friendly while also focusing on convenience. Examples include 100-calorie packs of snack food, pre-measured and kid’s meals, and resalable packaging.<sup>17</sup>

### Changing Legislation

- One major challenge for the Agribusiness and Food Processing Cluster right now is the debate surrounding genetically modified organisms (GMOs). Vermont is the first state to require food manufacturers to indicate whether there are GMO ingredients on their product labels. This new law in Vermont will likely be challenged but there is increased awareness and interest by consumers to understand what is in their food and how it was produced.<sup>17</sup>
- On July 7, 2014 New York State passed the Compassionate Care Act that allows patients with serious conditions to be certified to use medical marijuana for therapeutic or palliative care. Under this law the State will authorize up to 5 manufacturers and 20 dispensaries (4 per company) to grow and sell the drug statewide. The law requires that the growing must be done indoors at a secure facility and the State will control where licenses are issued to help ensure geographical diversity. The 7% excise tax on businesses’ gross income from the sale of marijuana will be distributed to the county where it is grown, to the county where it is sold, to fund drug abuse prevention programs, and to state criminal justice department for law enforcement.

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<sup>17</sup> First Research. (2014). *Industry Profile - Food Manufacturing*. Austin, TX: Dun and Bradstreet.

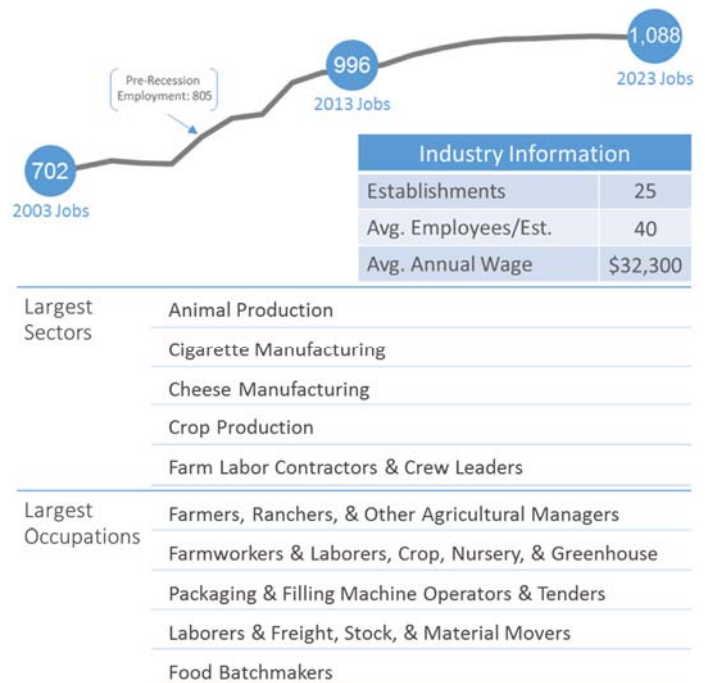
There are already companies actively searching for “grow space” as well as suitable extraction and packaging facilities. It is expected that this new legislation will create between 1,000 and 2,000 jobs statewide.<sup>18</sup> Jobs that have been created in other states where marijuana has become legal include some high-salary occupations such as master-growers, lawyers, scientists, security, accountants, marketing, sales and licensing.<sup>19</sup>

### Agriculture Act of 2014 (Farm Bill) Highlights<sup>20</sup>

- Significant funding increase to assist organic producers and handlers with cost of organic certification.
- Funding to support promotion of farm-to-consumer, farm-to-institution, and other locally and regionally produced food products intermediaries (storage, distribution, etc.) initiatives.
- Additional support for beginning farmers and ranchers and military veterans.
- Funding to support growing non-corn biomass for fuel, especially shrub willow.
- More information about the Agriculture Act of 2014 can be found in Appendix B.

### Franklin County Background & Trends

- High location quotients for cigarette and cheese manufacturing sectors indicates high concentration of these industries in Franklin County compared to the United States.
- The cheese manufacturing sector is dominated by a small number of firms.
- The Agribusiness & Food Processing Cluster lacks sector diversity: over 60% of employment in this cluster is in the animal production industry.
- The cluster shows strong employment growth, with the number of jobs increasing by 42% since 2003. Employment is projected to grow by another 9% by 2023.
- While crop production continues to be one of the largest sectors, employment in this sector has declined substantially (29% since 2003) and is projected to continue to decline in the future. Nationally, this sector is shedding jobs as well but at a lower rate than Franklin County.
- The total number of hired farm workers in Franklin County has remained steady since 2002, hovering around 650 workers. Franklin County farms hired 646 laborers in 2012.<sup>22</sup>



<sup>18</sup> *Compassionate Care NY: Resources*. (2014, August). Retrieved from Compassionate Care NY: <http://www.compassionatecareny.org/resources/>

<sup>19</sup> Unruh, H. (2013, February 21). *High-paying Jobs Available in New Medical Marijuana Industry?*. Retrieved from WCVB: <http://www.wcvb.com/health/High-paying-jobs-available-in-new-medical-marijuana-industry/19023576#1bN4QKi>

<sup>20</sup> *Agricultural Act of 2014 - Highlights and Implications*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: [http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications.aspx#VAiuF\\_ldVEQ](http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications.aspx#VAiuF_ldVEQ)



- Value of crop sales in Franklin County increased by 89% between 2007 and 2012 (double the growth experienced in NYS over the same period).<sup>21,22</sup>
- Milk from cows accounted for \$57 million in sales, about two-thirds of all Franklin County agricultural product sales in 2012. This was significantly more than the second best-selling category of product, hay and other field crops, which accounted for \$7.5 million in sales. Other product categories with over \$1 million in sales included—in descending order—corn; cattle and calves; and vegetables, melons, potatoes, and sweet potatoes.<sup>22</sup>
- Maple production in Franklin County increased by 40% between 2007 and 2012. Sales amounted to over \$310,000 in 2012 (growth in NYS over same period: 16%).<sup>22</sup>
- While the national trend has been one of farm consolidation, the number of farm operations with sales in Franklin County has increased from 300 in 2007 to 420 in 2012. Total number of farms and acreage in farm also increased by 14% and 11%, respectively.<sup>22</sup>
- The largest percent of farms are 10-49 acres (114 farms), followed by 260-499 acres in size (86 farms). The largest farms—those over 2,000 acres—added the most acreage between 2007 and 2012, increasing by 6,863 acres.<sup>22</sup>
- Cultivation of shrub willow for use as a biomass fuel presents a new agriculture opportunity for Franklin County.<sup>23</sup>
- Some sectors are dominated by older workers. 20% of employees in the crop production sector are 65+, 61% are 45+.
- Lack of agriculture processing facilities, especially certified slaughterhouses, within the region poses a barrier to growth.<sup>23</sup> Information collected during the interviews suggest that there is demand for a processing facility for other value-added goods somewhere in the county for producers to use, however the financial feasibility of establishing a facility has not yet been studied.

## Yogurt Production

- Location factors for Alpina Foods Greek yogurt facility in Batavia, NY included skilled workforce, proximity to growing milk supply, ability to reach target markets, tradition of agriculture and dairy in Western New York, and research on dairy and food science at Cornell University.<sup>24</sup>
- In general, the North Country has shown average or better than average production growth. However, this production is spread over a much larger area than other regions of New York.<sup>25</sup>
- State environmental regulations were recently adjusted to raise the maximum number of cows on a farm from 200 to 300 before concentrated animal feeding operations (CAFO) rules set in. This should make is less expensive for farms to add more cows to their herd.<sup>26</sup>

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<sup>21</sup> Note that in addition to the data collected from the data source EMSI, Camoin Associates also analyzed data collected from the 2012 Census of Agriculture prepared by the United States Department of Agriculture. Over the years using EMSI we have found that it tends to undercount employment in the Agriculture industry due to how those jobs are classified and reported. Camoin Associates focuses on the Agriculture Census for this data analysis and recommendations. See Attachment C for more information.

<sup>22</sup> 2012 Agriculture Census Results. (2012). Retrieved from USDA Census of Agriculture: <http://www.agcensus.usda.gov/>

<sup>23</sup> North Country Municipalities Consortium. (2017, July 1). *Cleaner, Greener Communities Program - Regional Sustainability Plans*. Retrieved from NYSERDA: <http://www.nyserdera.ny.gov/-/media/Files/About/Statewide-Initiatives/CGC-Plans/North-Country-CGC-Plan-Report.pdf>

<sup>24</sup> *Foreign Company to Invest \$15 Million and Create 50 Jobs*. (2011, April 8). Retrieved from Buffalo Niagara Enterprise:

[http://buffaloniagara.org/About\\_BNE/PressRoom/2011Archive/April/ALPINAFOODSGCEDAnnounceDecisionTOLOCATEMANUFACTURINGOPERATIONINBATAVIANY](http://buffaloniagara.org/About_BNE/PressRoom/2011Archive/April/ALPINAFOODSGCEDAnnounceDecisionTOLOCATEMANUFACTURINGOPERATIONINBATAVIANY)

<sup>25</sup> Boynton, R. D., & Novakovic, A. M. (2013, October). *Industry Evaluations of the Status and Prospects for the Burgeoning New York Greek-style Yogurt Industry*. Retrieved from Program on Dairy Markets Policy: <http://dairymarkets.org/PubPod/Pubs/RP13-01.pdf>

<sup>26</sup> Miller, M. (2013, June 1). *Yogurt Business is Booming in New York State*. Retrieved from The Buffalo News: [http://www.buffalonews.com/20130601/yogurt\\_business\\_is\\_booming\\_in\\_new\\_york\\_state.html](http://www.buffalonews.com/20130601/yogurt_business_is_booming_in_new_york_state.html)

- New York yogurt producers are beginning to source milk from neighboring states because New York dairy production has not kept up with new demand.<sup>27</sup>
- Production of yogurt in New York doubled between 2005 and 2011.<sup>28</sup>
- The number of yogurt processing plants in New York increased from 14 in 2000 to 29 in 2012. These plants range in size from small niche producers to major processing facilities.<sup>28</sup>

## Summary - Franklin County Outlook

The agribusiness industry in Franklin County has benefited over the years from abundant land, quality soil, major employers, and income growth. Overall, the cluster is expected to continue to grow over the next 10 years; however, the rate of growth will be significantly lower than the rate the county has enjoyed in the past. This growth pattern mirrors what is occurring at the national level. Despite favorable past and future growth projections, this industry faces significant changes and challenges moving forward.

While farm production and profits are expected to continue to grow, technology and process automation will decrease the industry's reliance on employees but require a heavier investment in machinery and equipment. In the future, farm owners and managers will increase output without the need for additional employees. Franklin County's Agriculture Cluster must be prepared for these changes. As technology becomes an increasingly important part of the agriculture industry, the jobs created will no longer be low skilled jobs but ones that require not only knowledge of farming practices but also advanced technology skills. Farms that are unable to invest in these new technologies will find it increasingly difficult to compete as larger operations scale in size and efficiencies.

In addition to this trend towards automation and consolidation, consumers are also demanding niche, hand-crafted, and locally-sourced agricultural products. These markets present an opportunity for small farms to continue to capture a portion of the agriculture market and fetch a high price for well-made goods.

Franklin County's agriculture industry is also hindered by the lack of food processing facilities, including slaughterhouses, which are necessary to convert raw agricultural goods into value-added products. This challenge has been identified by the North Country REDC as one that is hindering economic growth throughout the entire region. Creative solutions will be required to address this challenge as there are few places in the North Country with enough demand for a food processing facility and the expense of establishing one is high. One example of a solution that was funded by the North Country REDC in 2013 is a mobile poultry processing facility based in St. Lawrence County.<sup>29</sup> Franklin County entrepreneurs should be at the forefront of creating solutions like this one to address this regional need.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Agribusiness and Food Processing Cluster that:

- Focus on ways to increase profitability for existing farmers through techniques for extending the growing season, increasing productivity, expanding the market, and identifying niche markets

<sup>27</sup> The Associated Press. (2013, March 24). *Yogurt Production Growing in NY but Not the Cow Herd*. Retrieved from Syracuse.com: [http://www.syracuse.com/news/index.ssf/2013/03/yogurt\\_production\\_growing\\_in\\_n.html](http://www.syracuse.com/news/index.ssf/2013/03/yogurt_production_growing_in_n.html)

<sup>28</sup> *Governor Cuomo Hosts First New York State Yogurt Summit*. (2012, August 15). Retrieved from NY Governor Press Release: <https://www.governor.ny.gov/press/08152012-nys-yogurt-summit>

<sup>29</sup> *North Country Regional Economic Development Council and North Country Pastured Cut Ribbon on Mobile Processing Unit*. (2013, July 18). Retrieved from North Country REDC: <http://regionalcouncils.ny.gov/north-country/071813/ncredc-cut-ribbon-mobile-processing>

and value-added processing techniques. Consider the use of the internet, cooperative marketing and creative distribution solutions.

- Look into the feasibility of a “Food Hub” that provides county residents with access to a single place to process and market their foods. A large greenhouse on-site could help farmers extend their season without having to invest in the infrastructure on their own.<sup>30</sup>
- Find ways to coordinate and incorporate best management practices for farmers to be able to respond to changing legislation and environmental concerns.
- Make sure farmers and economic development professionals are up to date on all current legislation to ensure that they can capitalize on changes. Establish appropriate training, degree and certification programs to help farmers meet changing requirements and consumer demands.
- Strengthen networks among the existing farmers and farm industry supply chain through the development of regular meetings and an association. Work with existing companies to find ways for collaboration and/or cooperation.
- Establish an outlet for those in the industry to express issues they are facing in their business in a productive environment that encourages problem solving and solution development. Work to identify areas where a change could make being a farmer in Franklin County more viable, such as tax incentives, collaborative marketing, commercial processing facilities, etc.
- Development of the Franklin County brand and name recognition for products and goods produced in the county.
- Increased education for local residents about the benefits of eating local and supporting the county’s agricultural industry.
- Support the development of agri-tourism and “farm experience” tourism including the creation of wine/beer/food trails, packaging of deals between B&Bs and farms, experience packages that teach visitors how to cook with local food.
- Ensure access to financing is available for those farms that want to invest, grow and survive.
- Research feasibility of shrub willow and other crops for use as a biofuel input.

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<sup>30</sup> Examples of small community food hubs:

VERMONT: To help farmers in Vermont access processing equipment and storage facilities, the Vermont Food Venture Center Facility offers low-cost space and equipment rentals. The facility also offers one-on-one consultation and business advising services to small farms and food processing businesses.

WESTERN MASSACHUSETTS: Franklin Community Kitchen in Western Massachusetts offers support to food entrepreneurs, including one-on-one business consulting, product testing services, and marketing assistance. The facility also rents processing equipment and storage space at low rates.

HOOSICK FALLS, NY: On a smaller scale, the Hoosick Kitchen, managed by the non-profit HAYC3 in the Village of Hoosick Falls, NY, rents commercial kitchen space to small businesses on an hourly basis. This service provides space to young businesses that are too big to operate out of a home kitchen but too small to consider renting or owning their own commercial space.

## Environmental Science & Biotechnology Cluster

### Introduction

The Environmental Science and Biotechnology Cluster has been defined for Franklin County to include industries that include research and development, medical product manufacturing, and scientific technical services. The Environmental Science and Biotechnology Cluster was identified as a relevant cluster for Franklin County because of the recent emergence of this cluster as an important economic driver. The biotech cluster has been identified in recent strategic plans including the 2006 Saranac Lake Economic Development Strategy and the North Country Regional Economic Development Council's strategic plan for economic development. In addition to the cutting edge research occurring at the Trudeau Institute, there is also an emerging cluster of other related bio-tech companies in and around Saranac Lake. The environmental science aspect of this cluster is supported by the research and educational aspects of Paul Smith's College, the Paul Smith's Visitor Interpretive Center, the Adirondack Research Consortium, The Wild Center, and others.

The commercialization of research will help transform the economy in ways that otherwise would be impossible. Finding opportunities for public-private partnerships to research and materialize solutions to problems, specifically environmental sustainability problems, will further the goals of the community. The history of environmental research in the Adirondack Park, the clustering of environmental research groups and universities, and the core group of environmentalists with influential partners can position the region as a cutting edge location for environmental and sustainability research and development.

Selected Franklin County businesses and organizations in this cluster include the Trudeau Institute, a not-for-profit biomedical research institution; the Wild Center, a natural history center; and Myriad RBM, a testing laboratory with offices in Saranac Lake and Austin, TX.

The following section reviews global and national trends, summarizes findings from our research related to the Environmental Science and Biotechnology Cluster in Franklin County and outlines how all of these trends relate to Franklin County in terms of potential opportunities and competitiveness. More data can be found in the appendix.

### Industry Background & Trends

- Nationally, the growth rate of this cluster declined at the onset the recent recession, however it managed to post modest increases in employment between 2008 and 2013 (which included a portion of the recession).
- National employment in the Environmental Science and Biotechnology industry is projected to increase by 18% between 2013 and 2023.

### Biotechnology & Life Sciences Industry

- Collaboration is increasingly becoming the preferred method of innovation in the industry. Institutions including hospitals, businesses, government entities, and institutions of higher education are increasingly collaborating to refine research and development methods, improve

the ultimate product that is produced, and mitigate risk. Collaboration has also taken the form of joint ventures of two or more biotechnology or pharmaceutical firms.<sup>31</sup>

- According to a PwC survey of medical technology industry CEOs, 81% say they have plans to collaborate with a strategic partner over the next 3 years.<sup>32</sup>
- The implementation of the Affordable Care Act will also affect the biotechnology industry as firms shift priorities to align with the goals of the legislation. As the government shifts from a system of paying providers for the quality of care provided, providers will in turn expect drug and device manufacturers to demonstrate the quality and effectiveness of their product and the appropriateness of the price.<sup>33</sup>
- As health care information is more widely available, consumers will have more power to create demand.<sup>34</sup>
- In addition to the increasing power of consumers, hospital administrators, patient advocacy groups and other stakeholders will increasingly play a key role in creating demand for new medical drugs and devices. This trend will continue as the health care industry becomes more integrated and end-users have more purchasing power.<sup>35</sup>
- There continues to be a high level of investment in life sciences companies. Biotechnology and medical device startups received more corporate venture capital than any other industry in 2012/2013, accounting for 1 out of 3 dollars of venture capital invested in startups.<sup>36</sup>
- Large pharmaceutical companies are also investing in life sciences startups to promote innovation. The corporation acquires access and a stake in new innovative drugs, devices, and processes while the startup gains access to the established firm's connections, expertise, and capital.<sup>36</sup>
- Most (51%) pharmaceutical and life sciences industry CEOs are concerned about the availability of key skills among the existing workforce.<sup>37</sup>
- Most jobs in this industry require at least a bachelor's degree, however there are opportunities for workers with a high school diploma or associate's degree.<sup>38</sup>
- While biotechnology CEOs have identified workforce skills as a concern, fewer companies are dedicating resources to training new employees. Employees are expected to have the skills and experience to "hit the ground running."<sup>38</sup>

## Environmental & Scientific Consulting Industry

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<sup>31</sup> PricewaterhouseCoopers LLP. (2013, October). *Medtech Companies Prepare for an Innovation Makeover*. Retrieved from Health Research Institute: <http://www.pwc.com/us/en/health-industries/medical-technology-innovation/downloads.jhtml>

<sup>32</sup> PricewaterhouseCoopers LLP. (2014, February). *Fit for the Future - 17th Annual Global CEO Survey*. Retrieved from CEO Survey: <http://www.pwc.com/gx/en/ceo-survey/2014/assets/pwc-17th-annual-global-ceo-survey-pharmaceuticals-and-life-sciences-key-findings.pdf>

<sup>33</sup> PricewaterhouseCoopers LLP. (2012, November). *From Vision to Decision*. Retrieved from Pharma 2020: [http://www.pwc.com/en\\_GX/gx/pharma-life-sciences/pharma2020/vision-to-decision-form.jhtml](http://www.pwc.com/en_GX/gx/pharma-life-sciences/pharma2020/vision-to-decision-form.jhtml)

<sup>34</sup> PricewaterhouseCoopers LLP. (2012, November). *From Vision to Decision*. Retrieved from Pharma 2020: [http://www.pwc.com/en\\_GX/gx/pharma-life-sciences/pharma2020/vision-to-decision-form.jhtml](http://www.pwc.com/en_GX/gx/pharma-life-sciences/pharma2020/vision-to-decision-form.jhtml)

<sup>35</sup> Hisey, T. (2014, August). *2014 Outlook on Life Sciences*. Retrieved from Deloitte: [http://www.deloitte.com/view/en\\_US/us/Industries/life-sciences/be0d25719bb8b310VgnVCM1000003256f70aRCRD.htm](http://www.deloitte.com/view/en_US/us/Industries/life-sciences/be0d25719bb8b310VgnVCM1000003256f70aRCRD.htm)

<sup>36</sup> PricewaterhouseCoopers LLP. (2013, December). *Top Health Industry Issues of 2014*. Retrieved from Health Research Institute: [http://www.pwc.com/en\\_US/us/health-industries/top-health-industry-issues/download.jhtml](http://www.pwc.com/en_US/us/health-industries/top-health-industry-issues/download.jhtml)

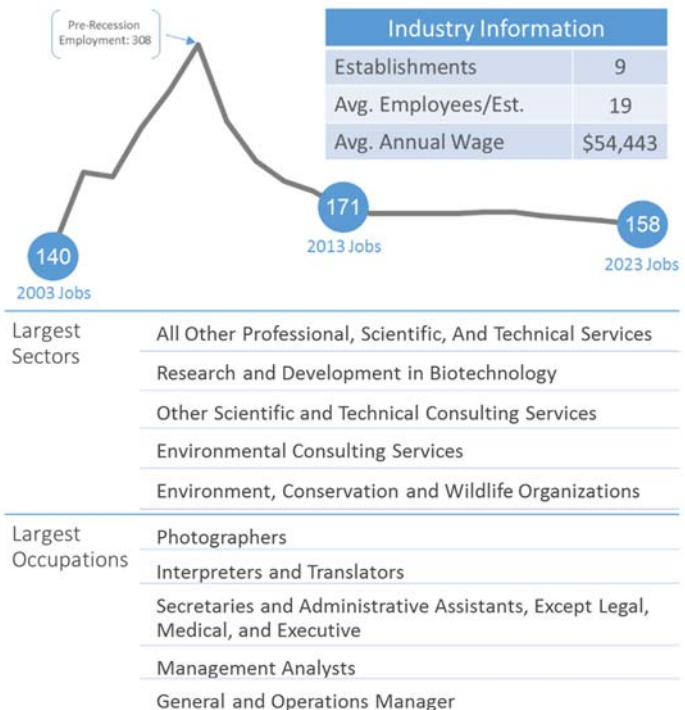
<sup>37</sup> PricewaterhouseCoopers LLP. (2014, February). *Fit for the Future - 17th Annual Global CEO Survey*. Retrieved from Global CEO Survey: <http://www.pwc.com/gx/en/ceo-survey/2014/assets/pwc-17th-annual-global-ceo-survey-pharmaceuticals-and-life-sciences-key-findings.pdf>

<sup>38</sup> Booz & Co. (2013, April 22). *Demand for Talent - Current & Projected Workforce Trends in the Life Sciences Industry*. Retrieved from Coalition of State Bioscience Institutes: [http://www.csbinstitutes.org/download/files/reports/CSBI\\_WorkforceReportvFR.pdf](http://www.csbinstitutes.org/download/files/reports/CSBI_WorkforceReportvFR.pdf)

- The sector suffered at the onset of the recession due to a low level of new construction and budget reductions for both the private and public sector.<sup>39</sup>
- Since the recession, the environmental sciences industry has recovered and is expected to grow at a fast pace in the future. Revenue is expected to grow by 7.7% on an annual basis through 2017 while the industry adds nearly 52,000 new jobs.<sup>40</sup>
- Factors contributing to this high growth rate include increasing environmental regulation, shifts in the energy industry, and new construction and renovations as the country recovers from the recession.<sup>40</sup>
- Many firms in the scientific consulting industry are sole proprietorships with no employees. There is increasing demand for consultants in this field, especially for specialized fields such as nanotechnology.<sup>39</sup>

## Franklin County Background & Trends

- While this cluster represents less than 1% of total jobs in Franklin County, it is still a significant employer and generally provides higher wages than those in other relevant clusters.
- The largest sectors in this cluster, “All Other Professional and Scientific, and Technical Services and Research and Development in Biotechnology,” are projected to decrease employment in Franklin County by 60% by 2023, shedding over 50 jobs combined.
- The cluster in Franklin County was extremely hard hit by the recession, contracting by 44% between 2008 and 2013.
- While there will be larger shifts in employment within the cluster, overall the environmental science and biotechnology cluster will lose 13 jobs by 2023.
- Environment Concentration and Wildlife Organizations and Research and Development in Biotechnology are exceptionally concentrated in Franklin County, with location quotients of 2.5 and 2.0 respectively. However, as the Biotechnology Research and Development sector loses jobs over the next 10 years, employment concentration in that industry will fall below the national average by 2023.



<sup>39</sup> Camoin Associates, IBISWorld. (2014, June). *Appendix D: Cluster Analysis*. Retrieved from Vermont Agency of Commerce and Community Development: <http://accd.vermont.gov/sites/accd/files/Documents/business/CEDS/Appendix%20D-%20Cluster%20Analysis.pdf>

<sup>40</sup> Lapowsky, I. (2012, June 4). *Business Opportunities in Environmental Consulting*. Retrieved from Inc.com: <http://www.inc.com/best-industries-2012/issue-lapowsky/environmental-consulting.html>

- With the goal of “creat[ing] the greenest energy economy in the state,” the North Country REDC recognizes that environmental analysis is a natural strength of the region and its higher education institutions. The North Country REDC’s Strategic Plan encourages collaboration between higher education, entrepreneurs, businesses, and other institutions to promote growth in this industry.<sup>41</sup>
- Other priorities identified by the North Country Sustainability Plan demonstrate the opportunities for environmental science to play a role in the region’s economic growth. These priorities include conversion to renewable energy sources, low carbon emission solutions to transportation issues, environmental protection, working landscapes, and watershed protection.<sup>42</sup>
- Paul Smith’s College offers degrees in a variety of fields related the environmental science and biotechnology cluster, including biology, environmental science, fisheries and wildlife science, forestry, and natural resource sustainability.
- SUNY Potsdam (in nearby St. Lawrence County) also offers a variety of relevant degrees including environmental studies, biology, and interdisciplinary natural science.
- Founded in 1884, the Trudeau Institute has been a pillar of the life sciences cluster in Franklin County. The Institute focuses on various aspects of infection and immunity, with eight teams focused on different pathogens.
- The Trudeau Institute recently established a partnership with Clarkson University with financial support from Governor Cuomo and New York State. This partnership of biotechnology and engineering is expected to lead to commercialization of new technologies that will lead to creation of new companies in the North Country.<sup>43</sup>
- In addition to the Trudeau Institute in Saranac Lake, there are other biotechnology firms such as Myriad RBM and Active Motif.

## Summary - Franklin County Outlook

For a small community, Franklin County boasts significant history in health care research and an array of impressive research institutions and higher education institutions focused on environmental and scientific research. However, since the recession began, this cluster has suffered from significant job losses, reducing the workforce in the sector by nearly 50%. To maintain and grow this cluster in the community, Franklin County has to promote entrepreneurship, innovation, and collaboration.

Paul Smith’s College and Trudeau Institute are pillars of this industry cluster. As an education institution, Paul Smith’s provides education in fields relevant to this industry. While students are being educated in these fields at Paul Smith’s facilities, the jobs may not be available to keep those trained students in the area. Providing additional opportunities for entrepreneurship while these students are in college could connect them to the area and perhaps prompt them to start their own business in the region. Providing this entrepreneurial support will require collaboration across a range of stakeholders, including existing

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<sup>41</sup> NC REDC. (2011, November). *North Country REDC Strategic Plan*. Retrieved from New York Regional Councils: [http://regionalcouncils.ny.gov/themes/nyopenrc/rc-files/northcountry/NCREDC\\_SMALL.pdf](http://regionalcouncils.ny.gov/themes/nyopenrc/rc-files/northcountry/NCREDC_SMALL.pdf)

<sup>42</sup> North Country Municipalities Consortium. (2017, July 1). *Cleaner, Greener Communities Program - Regional Sustainability Plans*. Retrieved from NYSERDA: <http://www.nyserda.ny.gov/-/media/Files/About/Statewide-Initiatives/CGC-Plans/North-Country-CGC-Plan-Report.pdf>

<sup>43</sup> Governor Cuomo Announces Major Partnership Between New York State, Clarkson University and the Trudeau Institute to Grow Biotech Industry. (2013, November 20). Retrieved from New York State Governor’s Website: <https://www.governor.ny.gov/press/11202013-clarkson-trudeau-biotech-partnership>

businesses, educational institutions, entrepreneur mentors, financial institutions, and government involvement.

The Trudeau Institute has been conducting cutting edge research for 130 years. This research asset is essential to attracting and encouraging new biotechnology startups in the region. The history and reputation of Trudeau and the biotechnology cluster emerging in the Saranac Lake region can be used to encourage the growth of this sector.

By leveraging opportunities and trends in New York and the North Country, including growing interest in clean energy, energy efficiency, and environmental awareness, Franklin County can encourage the creation or expansion of firms focused on these emerging trends. Several overarching projects identified in the North Country Sustainability Plan require environmental science expertise that could be provided by entrepreneurs, former students, and businesses from Franklin County.

Capitalizing on any trends in this cluster will require forward thinking and non-traditional strategies that incorporate multiple stakeholders and partners.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Environmental Science and Biotechnology Cluster that:

- Line up with strategic priorities identified in the North County Regional Economic Development Council's strategic plan including: identifying barriers to entry in the biotech cluster, provide expansion space for existing and/or early-stage companies, utilize equipment and capacity at Trudeau Institute, and establish a funding source to assist biotech businesses.
- Establish an industry specific task force to guide growth of the environmental science and biotech cluster.
- Facilitate collaboration between the environmental and biotechnology clusters throughout northern New York. The focus for Franklin County will be to bring together environmental science researchers, local businesses, educational institutions (universities, colleges and others such as the Wild Center and VICs), state, and other environmental agencies and environmental advocates to discuss how they can work together to foster the creation and commercialization of practical solutions to environmental problems.



## Forestry & Wood Products Cluster

### Introduction

The Forestry and Wood Products Cluster, including both primary and secondary product manufacturing was selected as a relevant cluster for additional research because of the important role it has played historically for Franklin County and a recognition that changes must occur for it to continue to be relevant. The resources of the northern forest have created a cluster of industry operations (production, logging, and paper mill) that have employed residents for generations.

The forest and wood products industry consists of companies engaged in operating timber tracts, nurseries, seeding, reforestation, and harvesting timber and other forest products. The industry also includes related services, such as cutting, logging, transporting, estimating, and other forest management services. Products manufactured include lumber, plywood, flake board, chips, sawdust, wood flooring, shingles, tiles, millwork, laminated veneer, fencing and other primary wood products.<sup>44</sup> Also included in this industry are paper and pulp manufacturers and other pulp related product manufacturing such as cardboard.

Selected Franklin County businesses in this cluster include Paul J. Mitchell Logging and Lizotte Logging.

The following section reviews global and national trends, summarizes findings from our research related to the Forestry and Wood Products Cluster in Franklin County and outlines how all of these trends relate to Franklin County in terms of potential opportunities and competitiveness. More data can be found in the appendix.

### Industry Background & Trends

- There are three subsectors of the Forestry and Wood Products Cluster including: 1) furniture and interior renovation product manufacturing, 2) pallets and plywood production, and 3) pulp and paper product manufacturing. There has been a decrease in jobs in these subsectors due to increased automation. However, the increase in automation requires that the employees have more technical skills and they can therefore demand higher wages.
- The Forestry and Wood Products Cluster has faced competition from cheap foreign goods.<sup>45</sup>



Wood Pellets



Clear-cut logging in southern Adirondacks  
Source: North Country Public Radio

<sup>44</sup> *Forest & Woods Products*. (2014, August). Retrieved from The New York Times: <http://markets.on.nytimes.com/research/markets/usmarkets/industry.asp?industry=51311&sector=51>

<sup>45</sup> Camoin Associates, IBISWorld. (2014, June). *Appendix D: Cluster Analysis*. Retrieved from Agency of Commerce and Community Development : <http://accd.vermont.gov/sites/accd/files/Documents/business/CEDS/Appendix%20D-%20Cluster%20Analysis.pdf>

- Wood products are facing competition from alternatives to wood-based products, including vinyl, plastics, and rubbers products.<sup>46</sup>
- Production costs for businesses in the Forestry and Wood Products Cluster are increasing. The cost of new logging equipment rose 50% in the last decade.<sup>46</sup>
- As of 2012 there were 28,097 employees in New York State involved in forestry & logging, wood products, and pulp & paper industries.<sup>47</sup> The current forestry workforce is aging and logging companies are struggling to attract new employees.<sup>46</sup>
- Forest landowners are aging: the average age of a forest landowner is 61.<sup>48</sup>
- Slow recovery of the housing market since the 2008 crash has decreased demand for wood products.<sup>49</sup>
- Deferred remodeling, renovations, and maintenance projects and pent up demand for new housing may lead to increased demand for wood products in the future.<sup>49</sup>
- Paper products are becoming increasingly important as a "green" alternative to petroleum based packaging.<sup>46</sup>
- Researchers from SUNY ESF looked into the role of tax policy in Northern Forest states (NY, NH, VT, ME) and found that NY has the least effective tax policy for maintaining land in forest production. The four states have widely different tax policies which has implications for the sustainability and viability of the forestry industry.<sup>50</sup>
- New York State offers the 480-a tax program to “encourage the long-term management of woodlands to produce forest crops and thereby increase the likelihood of a more stable forest economy.” First enacted in 1974, the program is eligible to land owners of at least 50 contiguous acres of land dedicated to forest crops.<sup>51</sup>

## Wood Biofuel

- The primary sources of wood biofuel are fuelwood and residues from the manufacture of forest products.
  - Fuelwood: harvested from forests and combusted to produce heat or energy in residential, commercial, or electric utility sectors.<sup>52</sup>
  - Primary mill residues: byproducts of mills that produce lumber, plywood and wood pulp. Residues are in the form of bark, sawmill slabs, edgings, sawdust, and peeler log cores. Most residues are used as fuel, mulch, or in the manufacture of other products.<sup>52</sup>
  - Secondary mill residues: byproducts of mills utilizing primary mill wood products (e.g. furniture, flooring, buildings, pallets). Residues are in the form of sawdust, sander dust, wood chips, wood shavings, board-end cut-offs, and scrap wood.<sup>52</sup>
  - Paper product manufacturing: produces a byproduct called black liquor which can be used to produce energy. Most paper producers use this energy internally.<sup>52</sup>

<sup>46</sup> Goergen, M., Harding, J., Owen, C., Rey, M., & Scarlett, L. (2013, May 29-30). *US Endowment for Forestry & Communities, Inc.* Retrieved from The State and Future of US Forestry and the Forest Industry: [http://www.usendowment.org/images/Forest\\_Sector\\_Report\\_-\\_FINAL\\_9.5.13.pdf](http://www.usendowment.org/images/Forest_Sector_Report_-_FINAL_9.5.13.pdf)

<sup>47</sup> *State Industry Economic Impact - New York*. (2012, Decemeber). Retrieved from American Forest & Paper Association: <http://www.afandpa.org/docs/default-source/default-document-library/new-york.pdf?sfvrsn=0>

<sup>48</sup> *Forest Resource Assessment & Strategy*. (2010, June). Retrieved from New York Department of Environmental Conservation: [http://www.dec.ny.gov/docs/lands\\_forests\\_pdf/fras070110.pdf](http://www.dec.ny.gov/docs/lands_forests_pdf/fras070110.pdf)

<sup>49</sup> Camoin Associates, IBISWorld. (2014, June). *Appendix D: Cluster Analysis*. Retrieved from Vermont Agency of Commerce and Community Development: <http://accd.vermont.gov/sites/accd/files/Documents/business/CEDS/Appendix%20D-%20Cluster%20Analysis.pdf>

<sup>50</sup> Newman, D., & Malmshemer, B. (2012, July 1). *Taxation and Sustainable Management in the Northern Forest*. Retrieved from Northeast States Research Cooperative: <http://nsrcforest.org/sites/default/files/uploads/newman09full.pdf>

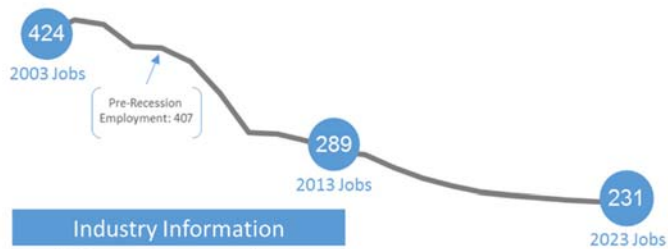
<sup>51</sup> *480-a Forest Tax Law*. (2014, August). Retrieved from Department of Environmental Conservation: <http://www.dec.ny.gov/lands/5236.html>

<sup>52</sup> Oak Ridge National Library. (2011, August). *US Billion-Ton Update - Biomass Supply for a Bioenergy and Bioproducts Industry*. Retrieved from US Department of Energy: [http://www1.eere.energy.gov/bioenergy/pdfs/billion\\_ton\\_update.pdf](http://www1.eere.energy.gov/bioenergy/pdfs/billion_ton_update.pdf)

- In 2011, wood biomass accounted for 129 million dry tons of fuel for consumption as energy or heat. This number is projected to grow to 210 million tons by 2022 and to 225 million by 2030.<sup>52</sup>
- Consumption of fuelwood for energy and heat is projected to grow from 38 million dry tons in 2011 to 96 million in 2022 and 106 million by 2030. This source of wood biofuel is growing more quickly than any other source.<sup>52</sup>
- Sources of fuelwood include logging residue, removal of excess biomass to prevent forest fires and improve forest health, and capturing forest products removed when developing forest land.<sup>52</sup>
- Integrated harvest practices, which produce wood for existing market demand and provide biomass for energy use, is projected to supply most new demand for wood biofuel.<sup>52</sup>
- Some have raised concerns about the sustainability of harvesting forest products for biofuel. To ensure that forests are harvested sustainably, best management practices, state or local regulations, or certifications should be considered.<sup>52</sup>
- Wood pellets are being utilized as a source of renewable energy, especially in the European Union, leading to a dramatic increase in wood pellet manufacturing.<sup>53</sup>
- Major facilities have been built in the southeast to process and export wood pellets exclusively for the European market. These states also demonstrate a higher percentage of conventional pulpwood as an input for wood biofuel than other states in the country.<sup>54</sup>

## Franklin County Background & Trends

- Employment in the Forestry and Wood Products Cluster has declined in Franklin County by 32% since 2003. The cluster is projected to decline by another 20% by 2023.
- The largest sector, logging, employed 32% of workers within this cluster. While this sector remained stable since 2003, it is projected to shed several jobs by 2023.
- In Franklin County, most businesses in this cluster are small. The average number of employees per establishment in this sector is 10.
- The “logging” and “support activities for forestry” sectors have high location quotients, with



Industry Information	
Establishments	29
Avg. Employees/Est.	10
Avg. Annual Wage	\$35,933

Largest Sectors	Logging
	Finish Carpentry Contractors
	Support Activities for Forestry
	Sawmills
	Non-upholstered Wood Household Furniture Mfg.
Largest Occupations	Logging Equipment Operators
	Carpenters
	Construction Laborers
	Heavy & Tractor Trailer Truck Drivers
	Sawing Machine Setters, Operators, & Tenders

<sup>53</sup> Goergen, M., Harding, J., Owen, C., Rey, M., & Scarlett, L. (2013, May 29-30). *US Endowment for Forestry & Communities, Inc.* Retrieved from The State and Future of US Forestry and the Forest Industry: [http://www.usendowment.org/images/Forest\\_Sector\\_Report\\_-\\_FINAL\\_9.5.13.pdf](http://www.usendowment.org/images/Forest_Sector_Report_-_FINAL_9.5.13.pdf)

<sup>54</sup> Vakkilainen, E., Kuparinen, K., & Heinimo, J. (2013, September 12). *Large Industrial Users of Biomass.* Retrieved from IEA Bioenergy Task 40: <http://www.bioenergytrade.org/downloads/t40-large-industrial-biomass-users.pdf>

employment seven times more concentrated in Franklin County than the national average. However, since these kinds of industries are primarily located near forests and now throughout the United States, these high location quotients may be skewed. There are several other sectors with location quotients of 2 or more, including “sawmills,” “nonupholstered furniture manufacturers,” and “mobile home manufacturers.”

- High value wood processing is going to Canada because of the subsidies being provided resulting in extraction occurring in New York State, raw products are then exported to Canada for higher level processing and then the products being sold back to the United States.
- Lack of sawmills and other solid wood products processing facilities in Franklin County and the North Country discourage growth in value added forest products. Some timber is processed outside of the region and returned to the North Country for use.<sup>55</sup>

### Wood Biofuel

- Wood pellets are generally less expensive than heating oil as a source of heat and with appropriate equipment produce almost no pollution. For these reason and its large supply of timber, the northeast is considered the most promising regional market in the US for use of wood biofuels in residential homes.<sup>56</sup>
- Demand for wood biofuels is strong in New York. Most of the wood harvested for energy in New York is used within the region.<sup>57</sup>
- The North Country REDC identified transitioning to biomass as a source of fuel as a priority in its Cleaner Greener Communities Sustainability Plan. This fuel source could substitute for heating oil in commercial, industrial, and residential buildings.<sup>58</sup>
- The ReEnergy facility in Chateaugay is designed to generate electricity from biofuels that can be sold to utilities to power businesses and homes. However, this facility has not been operational since 2012. ReEnergy recently petitioned the Public Service Commission to participate in NYSERDA’s Main Tier program, which it claims would allow the facility to reopen.<sup>59</sup>

### Summary - Franklin County Outlook

The Forestry and Wood Products Cluster in Franklin County shares many of the difficulties faced by this industry throughout the nation. The market for forestry products faces stiff competition from foreign imports and alternatives. Paper use has steadily declined as more and more activity occurs online and new paper stock is created from recycled materials. In addition, the markets are uncertain and fluctuate with national and global economic trends and the inputs are becoming increasingly expensive. While the cluster continues to employ nearly 300 people in Franklin County, it has been declining for many years and is projected to continue to shed jobs. Despite these weaknesses, the Forestry and Wood Products Cluster continues to be an important economic driver to Franklin County, the region, and the state and has been identified as a strategic priority in the North Country REDC’s strategic plan.

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<sup>55</sup> North Country Municipalities Consortium. (2017, July 1). *Cleaner, Greener Communities Program - Regional Sustainability Plans*. Retrieved from NYSERDA: <http://www.nyserdera.ny.gov/-/media/Files/About/Statewide-Initiatives/CGC-Plans/North-Country-CGC-Plan-Report.pdf>

<sup>56</sup> Harper, C. (2011, August). *Wood Pellets - Becoming a Primary Product*. Retrieved from US Endowment for Forestry & Communities, Inc.: [http://www.usendowment.org/images/Issues\\_in\\_the\\_Forest\\_Wood\\_Pellets.pdf](http://www.usendowment.org/images/Issues_in_the_Forest_Wood_Pellets.pdf)

<sup>57</sup> North East State Foresters Association. (2013, Fall). *The Economic Importance of New York's Forest-Based Economy*. Retrieved from NY Department of Environmental Conservation: [http://www.dec.ny.gov/docs/lands\\_forests\\_pdf/economicimportance2013.pdf](http://www.dec.ny.gov/docs/lands_forests_pdf/economicimportance2013.pdf)

<sup>58</sup> North Country Municipalities Consortium. (2017, July 1). *Cleaner, Greener Communities Program - Regional Sustainability Plans*. Retrieved from NYSERDA: <http://www.nyserdera.ny.gov/-/media/Files/About/Statewide-Initiatives/CGC-Plans/North-Country-CGC-Plan-Report.pdf>

<sup>59</sup> Wilson, Esq., S. D. (2014, June 3). *Petition of ReEnergy Chateaugay LLC for Public Service Commission Approval to Participate in Main Tier Solicitation*. Retrieved from Department of Public Service.

One of the greatest opportunities for growth in this industry is the growing market for renewable biomass fuel, including wood pellet production. The North Country REDC has identified biomass production as one of its strategies to economic growth in the North Country. However, in order for Franklin County to benefit from this increased demand, it needs facilities to process the raw wood into wood pellets or chips and customers to purchase the wood biomass. In the North Country, there is a market for wood pellets due to the region's reliance on heating oil and the lower cost and price stability of this biofuel. However, in order for customers to use this fuel source effectively, high-efficiency boiler technology must replace older heating systems. Some schools in the region have already made this conversion and found considerable savings. In addition to the regional market, the European Union imports a considerable amount of wood biomass.

In addition to challenges with lower and inconsistent demand, the forestry industry is being challenged by an aging workforce, aging business owners, increasing parcelization of forest tracts, and development of forest land for other uses. To better understand the future of its forestry industry, Franklin County should regularly communicate with forestry land and business owners to gather information about the future of the industry and provide information about potential new programs, initiatives, or tax reforms.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Forestry and Wood Products Cluster that:

- Identify ways to help transition existing producers into more competitive markets such as wood pellets or other biofuels.
- Grow the supply chain and support industries related to the use of wood pellets for heating fuel.
- Provide education and assistance to residents interested in transitioning to biofuels for commercial and residential properties.
- Work with schools and other major energy users to consider whether transitioning to wood pellets would offer them a cost savings for their heating needs.
- Continue to support and expand training programs that relate to the forestry industry including programs at Paul Smith's. Develop training programs that will help existing employees transition along with the changing industry trends.
- Improve competitiveness through strategic partnerships, cooperative equipment purchasing, targeted tax abatement programs and other tools to return forestry to a viable industry for Franklin County.
- Incorporate wood products into overall marketing strategy for goods made in Franklin County. Consider development of a certification program to ensure high quality goods are associated with the "Franklin County" brand and the values of the Adirondacks.

## Health Care & Wellness Cluster

### Introduction

The Health Care and Wellness Cluster includes a wide range of industries ranging from medical and specialty hospitals to nutrition facilities and fitness centers. The cluster has been created to include not only traditional health care industries, but also industries that are related to preventive care to consider a more holistic approach to physical well-being and disease prevention in Franklin County.

The Adirondacks and Saranac Lake in particular are well known for their history of being at the forefront of health and wellness, including the founding of the Trudeau Sanitarium as the premier center for healing tuberculosis. The Health Care and Wellness Cluster was identified as a relevant cluster because it continues to be a major employer for the county and an area where growth is expected to continue as the population continues to age and health care reform policies are implemented. It is also important to note that the Health Care and Wellness Cluster is closely tied to both the Environmental and Biological Science Cluster (research into infectious diseases continues at the Trudeau Institute) and the Tourism Cluster (wellness travel is a growing industry that Franklin County can capitalize on).

Selected Franklin County businesses and organizations in this cluster include Alice Hyde Medical Center, Franklin County Nursing Home, and Adirondack Health.

The following section reviews global and national trends, summarizes findings from our research related to Health Care and Wellness in Franklin County and outlines how all of these trends relate to Franklin County in terms of potential opportunities and competitiveness. More data can be found in the appendix.

### Industry Background & Trends

- The health and wellness industry increased employment by 26% between 2003 and 2013 and is projected to grow by another 22% by 2023.
- As the Affordable Care Act (ACA) is fully implemented, more than 25 million newly insured people will be added to the health care system over the next 9 years.<sup>60</sup>
- To control costs and align with the requirements of the ACA, health care providers are focusing on providing high quality care to patients.<sup>60</sup>



*Alice Hyde Medical Center*  
Source: Upstate New York Physician Recruiters



*Tuberculosis Sanatorium in Saranac Lake*  
Source: University of Virginia Claude Moore Health Sciences Library

<sup>60</sup> PricewaterhouseCoopers LLP. (2013, December). *Top Health Industry Issues of 2014*. Retrieved from Health Research Institute: [http://www.pwc.com/en\\_US/us/health-industries/top-health-industry-issues/download.jhtml](http://www.pwc.com/en_US/us/health-industries/top-health-industry-issues/download.jhtml)

- As people have greater access to information about health care and are able to be more discerning about the type and provider of care, the health care industry is shifting to a more "consumer centric" model.<sup>60</sup>
- Moving forward, goals of the health care industry will include improving care for chronic conditions, reducing hospital readmissions, and encouraging healthy living and disease prevention.<sup>60</sup>
- Horizontal integration is occurring throughout the industry to increase the size of health care providers and insurance companies with the goal of increasing competitiveness, consolidating services, reducing costs, increasing purchasing power, and collaborating. This integration ranges from formal (e.g. mergers, joint ventures) to informal (e.g. preferred partnerships, non-binding affiliations).<sup>61</sup>
- Vertical integration is also occurring throughout the industry as providers and insurers attempt to cut costs, increase efficiency, and control the continuum of services. Examples of vertical integration include hospitals merging with insurance providers and insurers partnering with physician groups.<sup>61</sup>
- Traditional firms are expanding their role in the health care economy. Some retail establishments (e.g. CVS, Walgreens) offer diagnostic services and chronic care management<sup>62</sup>
- New firms, including technology firms, are entering the market, competing with traditional health care companies.<sup>62</sup>
- Technology is becoming increasingly important to providing quality care to patients. Mobile devices and apps are being used by patients to find health care providers, make appointments, and manage care for chronic disease.<sup>62</sup>
- Consumers are increasingly willing to interact with care providers by email, web chat, or text.
- The aging population will place additional strain on the health care system. To meet this demand, the health care system will have to streamline services, encourage collaboration along the continuum of care, and leverage community-based organizations to provide care.<sup>62</sup>
- Telemedicine will be used to provide real-time diagnostic and care services and monitor recently discharged hospital patients from any geographic location.<sup>63</sup>
- Health care providers are using predictive analytics to determine high risk patients and provide appropriate care.<sup>62</sup>
- Skills required for workers in the health care industry are changing. While clinical knowledge will continue to be necessary, health care professionals will also need to be comfortable with mobile technology, predictive analytics, social media, and customer management systems to provide care. According to a PricewaterhouseCooper (PwC) survey of health care industry professionals, 63% are concerned about finding workers with the right skills to fill open positions.<sup>64</sup>
- Wages in the health care sector vary widely depending on job function and associated training requirements however, overall the average wages in the sector are slightly higher than US average with lower than average turnover rates.<sup>65</sup> It is also important to note the aging health

<sup>61</sup> Morris, M. (2014, August). *2014 Outlook on Health Care Providers*. Retrieved from Deloitte: [http://www.deloitte.com/view/en\\_US/us/Industries/health-care-providers/af230f13b6b8b310VgnVCM1000003256f70aRCRD.htm#.VAdeMvldVEQ](http://www.deloitte.com/view/en_US/us/Industries/health-care-providers/af230f13b6b8b310VgnVCM1000003256f70aRCRD.htm#.VAdeMvldVEQ)

<sup>62</sup> PricewaterhouseCoopers LLP. (2013, December). *Top Health Industry Issues of 2014*. Retrieved from Health Research Institute: [http://www.pwc.com/en\\_US/us/health-industries/top-health-industry-issues/download.jhtml](http://www.pwc.com/en_US/us/health-industries/top-health-industry-issues/download.jhtml)

<sup>63</sup> Ernst & Young. (2013). *New Horizons - 2013 Health Care Industry Report*. Retrieved from EY Industries: [http://www.ey.com/Publication/vwLUAssets/EY\\_-\\_New\\_horizons\\_2013\\_health\\_care\\_industry\\_report/SFILE/EY-New\\_horizons\\_2013\\_health\\_care\\_industry\\_report.pdf](http://www.ey.com/Publication/vwLUAssets/EY_-_New_horizons_2013_health_care_industry_report/SFILE/EY-New_horizons_2013_health_care_industry_report.pdf)

<sup>64</sup> PricewaterhouseCoopers LLP. (2014, February). *Fit for the Future - 17th Annual Global CEO Survey*. Retrieved from Global CEO Surveys: <http://www.pwc.com/gx/en/ceo-survey/2014/assets/pwc-17th-annual-global-ceo-survey-healthcare-key-findings.pdf>

<sup>65</sup> First Research. (2014). *Industry Profile - Health Care*. Austin, TX: Dun and Bradstreet.

care workforce, with nearly 40% of doctors over the age of 55. Approximately 33% of nurses are over the age of 50 with more than half of those planning to retire within the next 10 years. The aging workforce is expected to lead to a shortage of 260,000 nurses and 130,000 doctors by 2025. This shortage is expected to hit rural and underserved areas.<sup>65</sup>

- In an effort to reduce costs, some health care providers are outsourcing various services to third-party providers. Some of the services being outsourced include food service, housekeeping, laundry, IT and others.<sup>65</sup>
- A growing opportunity in the health care industry is telemedicine, which allows doctors to consult with and treat patients who may live in rural areas without access to a specialized facility.<sup>65</sup>
- The United States is a world leader in health care technology, scientific advances and medical research. Technological advances continue to improve the care of patients and health care providers are implementing health information technology (HIT) including electronic health records to help collaborate and coordinate care among doctors at multiple facilities. Digital health records and collaboration is particularly important in more rural areas where patients may need to travel to other hospitals to get specialized care.<sup>66</sup>

## Franklin County Background & Trends

- In Franklin County, the health care and wellness industry has grown by 397 jobs since 2003, a 13% increase.
- The health care and wellness industry accounts for 14% of employment in Franklin County, representing over 3,400 jobs.
- Franklin County has an exceptionally high concentration of employment in several sectors within this cluster, including specialized hospital facilities, outpatient facilities, and health planning services.
- While overall the cluster grew over the past 10 years, several sectors posted losses, including services for the elderly, nursing care facilities, home health care services, and fitness and recreational sports centers.
- By 2023, the industry is projected to expand employment by 17%, adding 574 new jobs. The largest employment gains will be in the general and specialized hospital facilities, pharmacies and drug stores, and physician offices. Services for the elderly, nursing homes, and home health care services are projected to continue losing jobs, defying the national trend of growth in these sectors.
- Registered nurses, home health aides, personal care aides, and psychologists are projected to grow the most between 2013 and 2023.
- Alice Hyde Medical Center has been recognized as one of the most wired health care organizations in the country and has a strong IT department who is able to handle the technical and digital record keeping aspects of the modern health care industry.
- As with many rural health care providers throughout the northeast and the United States, it takes a longer time to hire staff at Alice Hyde due to challenges related to trailing spouses and finding employees who are interested in living in a more rural community.

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<sup>66</sup> First Research. (2014). *Industry Profile - Health Care*. Austin, TX: Dun and Bradstreet.

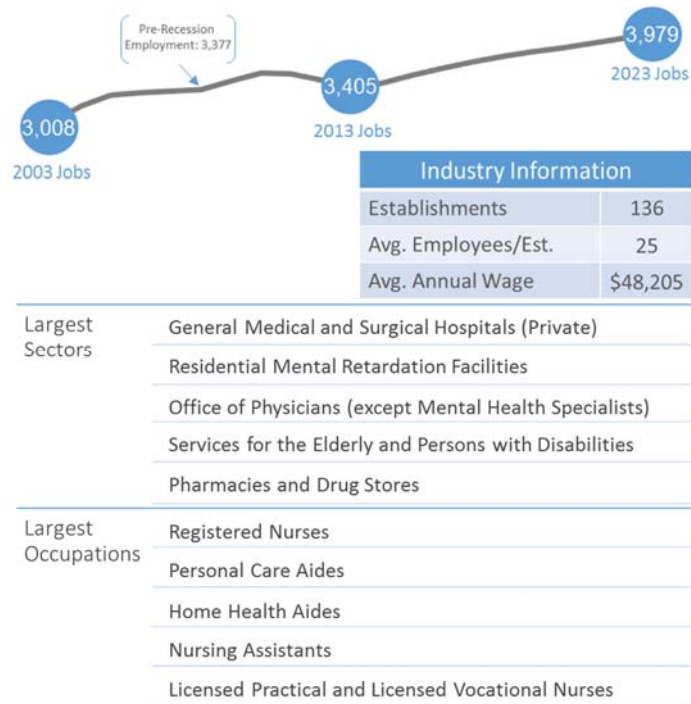


- Rural health care systems often need to partner with other hospitals for more technical or specialized service. Alice Hyde Medical Center partners with CVPH in Plattsburgh as well as Fletcher Allen in Vermont.
- Hospitals in rural areas tend to struggle the most with filling entry-level positions such as CNAs and medical office assistants where there are jobs but not enough trained employees.
- Alice Hyde Medical Center has been working closely with North Country Community College through collaborative efforts such as offering the hospital for clinical rotations and training at the hospital for nurses.

## Summary - Franklin County Outlook

On the national level, the health care industry is facing challenges and new opportunities resulting from dramatic demographic shifts in the population, regulatory changes due to the Affordable Care Act (ACA), and the fast pace of technological innovation. Health care insurers and providers are finding new ways to collaborate and integrate to improve services to patients, implementing new technology to improve care and reduce the need for hospital readmissions, and adhering to the new requirements of the ACA.

The health care industry in Franklin County must also adapt to the new realities of this important employer. Integration within the health care industry is becoming increasingly common to increase purchasing power, provide a broader range of services, eliminate duplicate services, and reduce costs. Franklin County health care industry should continue to strengthen strategic partnerships both within and beyond the borders of the county that would improve the quality and cost competitiveness of the care provided. Traditional health care providers will also be challenged by new entrants to the industry as well as established firms expanding their range of services.



In addition to increased integration, new technology will increasingly play a role in the diagnostic and treatment of diseases, requiring physicians and hospitals to be flexible and adaptable to these changes. As the ability to provide diagnosis and treatment from remote locations becomes more widely utilized, patients will be able to choose from providers

across the globe. While this could be an improvement in the quality of care provided, it puts individuals employed in this industry in Franklin County at risk of being displaced by practitioners in other parts of the country. To ensure continued viability of the health care industry, Franklin County providers must remain on the cutting edge of medical technology procedures and technology, providing the best quality care to residents of the country and perhaps beyond.

In addition to traditional health care providers, the Health Care & Wellness Cluster also includes sectors focused on providing long-term health solutions and opportunities for healthy living. These sectors include fitness, diet, spas, and other wellness services. The health care industry is increasingly focused on including these types of services into prescriptions for care. In the future, a dynamic and integrated health care industry will have to include robust sectors of the peripheral services.

While the importance of the health care sector is clear in terms of the jobs and other economic benefits to the community, it also has a significant impact on the overall quality of life experienced by the residents of a community. Without access to health and wellness amenities, residents will experience discomfort and risk acquiring a chronic disease, such as diabetes or hypertension. Health and wellness assets are critical to ensuring an exceptional quality of life to the community's residents and the ability to attract and retain new residents.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Health Care and Wellness Cluster that:

- Work with community colleges and K-12 to direct people into health care jobs to fill growing demand for CNAs and other health care professionals.
- Develop a system to help connect trailing spouses with employment opportunities. Create a network to increase community engagement and encourage people to relocate and stay in Franklin County.
- Continue to support investments in health care technology for Alice Hyde Medical Center and other health care providers to increase services provided and ability to collaborate within the northeastern network of providers.
- Find ways to educate residents about the importance of wellness care as preventive medicine.

## Tourism, Culture & Recreation Cluster

### Introduction

The Tourism, Culture and Recreation Cluster is important to Franklin County in terms of the businesses that are supported by visitors and the amount of money that is spent by visitors throughout the county each year. This cluster includes lodging facilities, restaurants, cultural offerings, and scenic transportation industries. Franklin County has a range of tourism destinations from the “Forever Wild” forests of the Adirondacks to Malone Golf Club, Titus Ski Mountain, and The Wild Center. All of these attractions are unique destinations in their own right, but with some investment there is potential to expand the tourism industry in Franklin County to capture more visitors for longer periods of time.

A challenge for Franklin County related to this cluster is that a majority of the occupations related to tourism and culture are not well paying and are either seasonal or part time. Tourism will always be an important part of the Franklin County economy, but work needs to be done to raise the level of wages to improve the quality of life for employees and improve the overall economy throughout the year.

Selected Franklin County businesses and attractions in this cluster include Titus Mountain Family Ski Center, Akwesasne Museum, and Adirondack Artists Guild Art Gallery.

The following section reviews global and national trends, summarizes findings from our research related to the Tourism, Culture and Recreation Cluster in Franklin County, and outlines how all of these trends relate to Franklin County in terms of potential opportunities and competitiveness. More data can be found in the appendix.

### Industry Background & Trends

- Despite a dip due to the recession, employment in the tourism industry has grown by 17% since 2003 and is projected to continue to increase by another 16% by 2023.
- The hotel and motel industry is primarily driven by business and tourist travel, both of which are directly impacted by the strength of the global, national, and regional economy. Another major driver of the industry is the cost of energy prices including diesel and regular gas. Larger hotel companies have the advantage of having economies of scale and name recognition where smaller companies (including boutique hotels) are able to serve a niche market with unique services. Many companies use online reservation systems (Hotels.com, Expedia, Travelocity, etc.) and those that do not utilize these systems may have serious marketing issues because of the ability for the aggregators to offer lower prices and how common using these systems has become for the consumer. The hospitality industry typically offers wages lower than the national average and sees high personnel turnover. As of July 2014, the hotel industry is on target to report its best year ever based on the level of rooms booked.<sup>67</sup>
- Outdoor recreation has continued to grow in popularity, with a net gain of 4 million outdoor participants between 2010 and 2013. Running, jogging, and trail running were the most popular outdoor activities. Stand up paddling had the highest percentage of first time participants.<sup>68</sup>
- Nearly half of all Americans participated in some form of outdoor recreation in the past year.<sup>68</sup>

<sup>67</sup> First Research. (2014). *Industry Profile - Hotels, Motels, & Resorts*. Austin, TX: Dun and Bradstreet.

<sup>68</sup> 2013 Outdoor Recreation Participation Report. (2013). Retrieved from Outdoor Foundation: <http://www.outdoorfoundation.org/pdf/ResearchParticipation2013.pdf>

- Technology has caused fundamental changes to the tourism industry. Many travelers do research, make bookings, and make plans using the internet. The development of location or event specific apps has become more popular as a way to disseminate information and provide directions to other local attractions.
- Downhill snow sports are growing in popularity, recording an 11.7% year-over-year increase between 2012 and 2013 in the US.<sup>69</sup>
- Travelers today are interested in having distinct, authentic experiences.
- Wellness tourism is a growing niche market in the tourism industry. Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's personal well-being. Wellness can be either the primary or secondary purpose of the trip.<sup>70</sup>
- The number of travelers who are looking for active adventures is growing with adventure travel growing at a rate of 65% per year since 2009. **Typically active travel appeals to younger travelers and will include some combination of nature, culture and physical activity.** Over half of travelers are planning some type of adventure activity on their next trip as a way to stay active and healthy while traveling.<sup>71</sup>
- With the signing of the Ski Area Recreation Opportunity Act by President Obama in 2011 the Forest Service is now able to increase permitted summer-time uses at ski areas in national forests. Ski areas are now looking towards expanding their off-season offerings with mountain bike trails, zip line tours, canopy tours, climbing walls, hiking trails, Frisbee golf courses, alpine courses (to be considered on a case by case basis) and other attractions that they had previously been unable to offer. Vail, Breckenridge, and Heavenly Mountain in Colorado are all making major investments in their facilities to incorporate summer attractions to hopefully grow their business and reduce the seasonality of their current business model. One unique aspect of the Vail investment is that they are looking to have a heavy focus on the educational components and engaging users in learning about the history of the region including the gold mining of the 1850's.<sup>72</sup>
- One of the fastest growing segments of the travel industry is youth athletics, an estimated \$7 billion industry.<sup>73</sup> A 2013 study estimated that 35 million



Summer activities at Vail Mountain Ski Resort  
Source: Mountain Town News



Cooperstown Dreams Park

<sup>69</sup> RRC Associates, Inc. (2012/2013). *Ski Areas of New York Economic Value Analysis*. Retrieved from Ski Areas of New York, Inc.: [http://www.iskiny.com/files/public/pdf/SKI\\_AREAS\\_OF\\_NEW\\_YORK\\_ECON\\_Study\\_FINAL.pdf](http://www.iskiny.com/files/public/pdf/SKI_AREAS_OF_NEW_YORK_ECON_Study_FINAL.pdf)

<sup>70</sup> SRI International. (2013, October). *The Global Wellness Tourism Economy*. Retrieved from Global Spa & Wellness Summit: [http://www.globalspaandwellnesssummit.org/images/stories/gsws2014/pdf/Global\\_Wellness\\_Tourism\\_Economy\\_Full\\_Report\\_Final.pdf.pagespeed.ce.EpcjWAsFTK.pdf](http://www.globalspaandwellnesssummit.org/images/stories/gsws2014/pdf/Global_Wellness_Tourism_Economy_Full_Report_Final.pdf.pagespeed.ce.EpcjWAsFTK.pdf)

<sup>71</sup> Resonance Consultancy. (2013, December 5). *2014 Trends in Travel & Tourism*. Retrieved from Travel and Tourism Research Association: <http://attraction.ttracanada.ca/top-20-trends-will-shape-future-tourism-destination-community-development-2014/#.VAYnsPldVEQ>

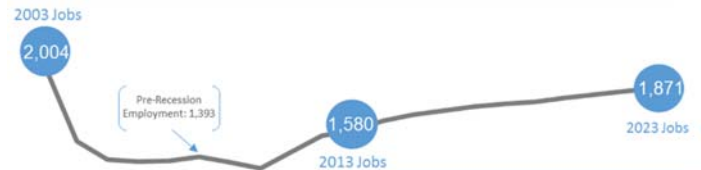
<sup>72</sup> Best, A. (2014, April 21). *Summer Use of Ski Areas*. Retrieved from Mountain Town News: <http://mountaintownnews.net/2014/04/21/summer-ski-area-use/>

<sup>73</sup> Koba, M. (2014, January 13). *Spending Big on Kids Sports? You're Not Alone*. Retrieved from CNBC: <http://www.cnbc.com/id/101326773#>

kids age 5-18 play organized sports each year and that 60% of those are playing sports outside of school (21 million).<sup>74</sup> A study conducted by the Sports Travel Magazine found that 27% of all trips taken in 2012 were for the “sole purpose of attending and organized sporting event.”<sup>75</sup> On average parents spend \$300 per weekend when traveling to tournaments and other events including lodging, food, and additional recreation and retail spending.<sup>76</sup> The trend is not showing any signs of slowing and many communities are trying to capitalize on this trend by building youth athletic facilities to attract the major tournaments and other events.<sup>77</sup>

## Franklin County Background & Trends

- Most people visit the area to engage in outdoor activities.<sup>78</sup>
  - Hiking is the most popular outdoor activity.
  - Events and sports are growing draws to the region.
- Winter months are growing in popularity for visitation to Franklin County and the Adirondacks.<sup>78</sup>
- Second homes account for the most tourism spending in Franklin County.<sup>79</sup>
- One challenge facing the county’s tourism industry is that the primary population and economic centers (Malone, Tupper Lake, Saranac Lake) are spread out, which makes it difficult to share resources and assets.
- Paul Smith’s College offers a number of bachelor degree programs that focus on the hospitality industry including Culinary Arts and Service Management; Food Service and Beverage Management; Hotel, Resort and Tourism Management; and, Recreation, Adventure Education and Leisure Management.
- The Tourism Cluster is concentrated in the restaurant industry, which employs nearly 50% of the cluster’s total jobs. Not all of these restaurants cater to visitors, but having access to restaurants and other eateries is an important aspect of creating a tourism cluster.
- While the cluster decreased employment by 27% between 2003 and 2013 in Franklin County, it is projected to grow 18% by 2023.
- Based on interviews it is clear that people who choose to travel to Franklin County are looking for a more authentic Adirondack experience than can be found in the more developed areas of the region like Lake Placid. The existing



Industry Information	
Establishments	149
Avg. Employees/Est.	11
Avg. Annual Wage	\$18,977

Largest Sectors	
	Full-Service Restaurants
	Limited-Service Restaurants
	Hotels (except Casino Hotels) and Motels
	Independent Artists, Writers, & Performers
	Drinking Places (Alcoholic Beverages)

Largest Occupations	
	Combined Food Preparation & Serving Workers, incl. Fast Food
	Waiters & Waitresses
	Bartenders
	Cooks, Restaurants
	First-Line Supervisors of Food Preparation & Serving Workers

<sup>74</sup> Youth Sports Statistics. (2013, 10 September). Retrieved from Statistic Brain: <http://www.statisticbrain.com/youth-sports-statistics/>

<sup>75</sup> Helms, K. J. (2013, November 25). PRWeb. Retrieved from The Sports Facilities Advisory Deems Youth Sports and Sports-Related Travel “Recession Resistant” — Youth Sporting Events Create \$7 Billion in Economic Impact: <http://www.prweb.com/releases/2013/11/prweb11362596.htm>

<sup>76</sup> Souza, K. (2014, January 9). Amateur Sports, Facilities Sought to Spur Local Economies. Retrieved from The City Wire: [http://www.thecitywire.com/node/31183#\\_U\\_M7cPldW51](http://www.thecitywire.com/node/31183#_U_M7cPldW51)

<sup>77</sup> Koba, M. (2014, January 13). Spending Big on Kids Sports? You’re Not Alone. Retrieved from CNBC: <http://www.cnbc.com/id/101326773#>

<sup>78</sup> PlaceMaking. (2013, May). Leisure Travel Study. Retrieved from Lake Placid Convention and Visitor’s Bureau: <http://www.roostadk.com/files/2012LeisureTravelStudy.pdf>

<sup>79</sup> Tourism Economics, an Oxford Economics Company. (2012, June 14). I Love NY. Retrieved from The Economic Impact of Tourism in New York - Adirondacks Focus: <http://www.iloveny.com/includes/content/docs/media/tourism-impact-2011-adirondacks.pdf>

tourist destinations such as the Malone Golf Club and Titus Mountain draw from the Canadian market with people regularly coming from Ottawa and staying at local hotels such as the Holiday Inn Express in Malone.

- The Akwesasne Mohawk Casino is another major driver of tourism in Franklin County. The casino has expressed interest in sourcing more food for its restaurants from local farms.
- The St. Regis Reservation is also capitalizing on growing interest in cultural tourism to showcase its rich history and culture, as demonstrated by its “Experience Akwesasne” initiative and tourism strategic plan “Sharing the Spirit”.
- Visitor data from The Wild Center in Tupper Lake indicate that many people are staying in Lake Placid, at regional camping facilities, or making day trips from the Capital Region or Old Forge area.
- There is growing demand in the county for guided tours and excursions that offer visitors an easy and accessible way to experience the Adirondacks. Educational programs offered by The Wild Center are well attended and well received by the guests.
- Existing lodging facilities in Franklin County are primarily older motels without the modern amenities now demanded by today’s travelers. While people are traveling to the Adirondacks to experience nature and the outdoors, they still want to have access to technology and modern amenities that make them feel safe.
- The renovation and reopening of Hotel Saranac in Saranac Lake will offer additional hotel rooms for travelers looking for a higher-end experience with modern amenities. Additionally, the Hotel Saranac will create additional opportunities for regional conferences (approximately 200 person events) and other events to take place in Franklin County rather than having to be held in Lake Placid. Conference center space is also available at The Wild Center.

## Summary - Franklin County Outlook

The tourism industry has become increasingly important to the United States’ economy. The industry was one of the first to recover from the recent recession and is considered one of the country’s largest exports. In addition to its importance on the national level, the tourism industry has become integral to the economic development strategies of communities throughout the country.

Franklin County is poised to take advantage of many new trends in the tourism industry, including a growing interest in outdoor recreation, wellness tourism, and a desire for “authentic” experiences that could not be replicated elsewhere. Franklin County’s rural and small town nature and proximity to the Adirondacks will attract visitors interested in enjoying nature and the outdoors. Tupper Lake, Saranac Lake, and the St. Regis Reservation are already huge drivers of tourism to the region, each offering unique visitor experiences. Tourism interest could be expanded to other parts of the county by capitalizing on interest in agri-tourism, which would further support the agriculture industry and local food production.

With its history of providing natural health services to people suffering from ailments such as tuberculosis, Franklin County is uniquely positioned to capitalize on the “wellness tourism” trend. While this niche tourism market includes strictly wellness oriented facilities such as spas and yoga retreats, it also includes travelers who are interested in having active, healthy-conscious vacations, including engaging in outdoor activities and eating local, fresh, healthy foods, amenities that can be provided by Franklin County’s unique characteristics.

While the tourism industry can bring many benefits to a community, it cannot be relied upon solely for economic development. The majority of the positions created in the industry are low-wage and low-skilled and many are part-time or seasonal.

A community's investment in tourism pays dividends not only through the new visitors it attracts, but also by improving the quality of life of residents who will also be able to enjoy new amenities.

As part of the Comprehensive Economic Development Strategy, Franklin County should consider priority projects and initiatives for the Tourism, Culture and Recreation Cluster that:

- Encourage the development of more modern hotels to accommodate changing tastes of tourists, accommodate larger groups such as bus tours and event participants.
- Develop amenities and facilities that appeal to tourists looking for a combination of adventure and wellness. Find ways to offer packages between B&B, outfitters, tour guides, and others to create experiences and memorable vacations that appeal to a wide range of visitors including Millennials, Baby Boomers as well as families with children.
- Continue to market to Canadian tourists and find ways to extend and enhance their stay in Franklin County through increased offerings, package deals, and specially designed programs and promotions.
- Conduct a comprehensive visitor survey to better identify and target specific traveler markets.
- Use existing tourism amenities through multiple seasons to reduce seasonality of the tourism industry. Examples include: snowshoeing and cross country skiing on golf courses, mountain biking, zip lining, climbing walls, ropes *courses*, geocaching, and Frisbee golf on ski mountains. Invest in upgrades at existing facilities to support their financial health and stability.
- Continue development and marketing of adventure races such as the Mud and Mucker (Tupper Lake) throughout the county. Create a new "Adirondack Experience" series of races (running, biking, triathlon, duathlon, etc.) or other to attract visitors throughout the seasons.
- Build on the wellness and health values of the Adirondacks and historic focus in Saranac Lake.
- Build on the educational experiences available in the Adirondacks through the use of outdoor excursions with options for a range of abilities. For example, rock climbing tours that include information about the natural history of the Adirondacks, canoe trips that highlight wildlife found in the Adirondacks.
- Find ways to support entrepreneurs entering the tourism industry through technical and financial assistance, networking opportunities, training, and cooperative marketing efforts.
- Study the feasibility of developing a location for youth athletics and other athletic events. Ensure adequate support facilities exist nearby such as hotels, food, retail, and other recreational amenities. Consider ways to fund the investment.
- Provide technical and financial assistance to students of Paul Smith's School of Commercial, Applied and Liberal Arts hospitality programs who are interested in starting their own business. Create a culture of entrepreneurship that extends to college students through recreation/tourism focused business competitions, business training programs and networking events.
- Develop a tourism industry financing program in partnership with public and private sources to incentivize investments in lodging, recreation and food service establishments.

## Attachment A – Data Centers

While not considered a “relevant cluster,” additional research was conducted on data centers, including the location requirements, obstacles, and benefits.

- Market for data center infrastructure is continuing to grow globally, with the US representing over 40% of that market. This market is expected to grow 5% annually on average, reaching a value of \$152 billion by 2016.<sup>80</sup>
- “Outsourced” data centers are becoming increasingly popular, due to the growing technology costs and specialization. Outsourced data centers house data from multiple companies.<sup>81</sup>
- In a 2013 survey of data centers, 68% averaged between 10,000 and 25,000 square feet. In addition to these smaller data centers, there is growing demand for larger “mega-centers.”
- Data centers usually require few employees. However, these workers are generally highly paid and very skilled.<sup>82</sup>
- The presence of a data center can be leveraged to attract other information intensive industries, including information technology, life science, and research and development firms.<sup>83</sup>
- Data centers require exceptional power, water, and technology infrastructure, assets that can also be leveraged to attract other industries.<sup>83</sup>
- Important factors when siting a data center include<sup>84,85</sup>:
  - Security
  - Stable, redundant, and affordable power
  - Redundant fiber with high bandwidth connectivity
  - Favorable business climate
  - Major customers and access to markets
  - Cooperative zoning approval process
  - Available and affordable land
  - Minimal risk of weather disruption
  - Minimal risk of manmade disruption, including proximity to pipelines, quarries, mines, and railroads
  - Cool climates: data centers must be temperature controlled. Geographies with cool climates can help reduce cooling costs.
  - Technically skilled workforce: data centers require highly skilled workers, including hardware engineers, software administration, security, management, sales, and customer service.
- Yahoo data center in the City of Lockport recirculates outdoor air and renewable wind and hydropower energy to remove heat, reducing its electricity costs.<sup>86</sup>

<sup>80</sup> Data Center Infrastructure Market will be Worth \$152 Billion by 2016. (2012, July 11). Retrieved from Canalys: <http://www.canalys.com/newsroom/data-center-infrastructure-market-will-be-worth-152-billion-2016>

<sup>81</sup> DCD Focus. (2014, January 13). *15% Growth Forecast for North America Colocation Market 2014*. Retrieved from Datacenter Dynamics: <http://www.datacenterdynamics.com/focus/archive/2014/01/15-growth-forecast-north-america-colocation-market-2014-0>

<sup>82</sup> Digital Reality. (January 2013). *N. America Campos Survey Results*. San Francisco : Digital Reality .

<sup>83</sup> Damiris, J. (2014, March 14). *Data Centers for Business and Economic Development*. Retrieved from Expansion Solutions: [http://www.expansionsolutionsmagazine.com/industry\\_articles/view/7771/data\\_centers\\_for\\_business\\_and\\_economic\\_development](http://www.expansionsolutionsmagazine.com/industry_articles/view/7771/data_centers_for_business_and_economic_development)

<sup>84</sup> Freeman, T. (2011, Spring). *What's Important in the Data Center Location Decision?* Retrieved from Area Development: <http://www.areadevelopment.com/siteSelection/may2011/data-center-location-decision-factors2011-62626727.shtml>

<sup>85</sup> Sharma, R. (2014, February 18). *What Drives Data Center Decisions?* Retrieved from Forbes: <http://www.forbes.com/sites/rakeshsharma/2014/02/18/what-drives-data-center-decisions/>

<sup>86</sup> The Associated Press. (2010, September 20). *Yahoo Unveils New Energy Efficient Data Center in Upstate New York*. Retrieved from Huffington Post: [http://www.huffingtonpost.com/2010/09/20/yahoo-unveils-new-energy-\\_n\\_732217.html](http://www.huffingtonpost.com/2010/09/20/yahoo-unveils-new-energy-_n_732217.html)



- In Western New York, the City of Lockport lost a data center project interested in the industrial park due to a lack of “dark fiber,” fiber-optic cable necessary for high-speed internet service.<sup>87</sup>

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<sup>87</sup> Prohaska, T. (2013, March 17). *Lack of 'Dark Fiber' Hinders Data Center Deals for Lockport IDA*. Retrieved from The Buffalo News: <http://www.buffalonews.com/apps/pbcs.dll/article?AID=/20130317/CITYANDREGION/130319281/1010>

## Attachment B – Agricultural Act of 2014

The Agricultural Act of 2014, also known as the “Farm Bill,” was signed into law on February 7, 2014. The Act authorizes \$956 billion dollars in spending over the next 10 years for nutrition and agriculture programs throughout the United State. The Act initiated many changes in agriculture and nutrition policy. The following summary highlights some key new provisions providing a summary of portions of the Agricultural Act that pertain to Franklin County and its Agribusiness & Food Processing cluster.

For additional information about the Agricultural Act of 2014, please see the [Agricultural Act of 2014: Highlights and Implications page](#) of the United States Department of Agriculture Economic Research Service website.

### Crop Insurance<sup>88</sup>

- New Programs:
  - Price loss coverage: payments to producers of wheat, feed grains, rice, oilseeds, peanuts, and pulses when national market prices fall below the reference price for the commodity.
  - Agriculture Risk Coverage (ARC) Program: payments are provided to producers of covered commodities when county or individual crop revenue falls below a certain level (depending on the program selected).
- Reauthorizes livestock disaster assistance
- Expands crop insurance to fruits, vegetables, and organic products
- Repealed Programs:
  - Direct payments
  - Countercyclical payments
  - Average crop revenue election
  - Supplemental revenue assistance

### Impacts on Dairy<sup>89</sup>

- Dairy Margin Protection Program (MPP): provides benefits to dairy producers when the difference between milk prices and feed costs falls below a target margin
- The MPP program was designed to protect producer margins, replacing programs that were designed to support dairy prices.<sup>90</sup>
- Repealed Programs:
  - MILC payments eliminated (replaced by Margin Protection Program)
  - Dairy Product Price Support Program
  - Dairy Export Incentive Program

<sup>88</sup> *Agricultural Act of 2014 - Crop Commodity Programs*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/crop-commodity-programs.aspx#VBC47fIdVEQ>

<sup>89</sup> *Agricultural Act of 2014 - Dairy & Livestock*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/dairy-livestock.aspx#VAhxQPldVEQ>

<sup>90</sup> Campiche, J. (2014, Spring). *Theme Overview - Deciphering Key Provisions of the Agricultural Act of 2014*. Retrieved from Choice Magazine: <http://www.choicesmagazine.org/choices-magazine/theme-articles/deciphering-key-provisions-of-the-agricultural-act-of-2014/theme-overview-deciphering-key-provisions-of-the-agricultural-act-of-2014>

### Organic Farm Certification Cost Share Program<sup>91</sup>

- National Organic Certification Cost-Share Program (Title X): funding doubled from 2008 Farm Act's mandate to assist organic producers and handlers with the cost of organic certification
- Expanded crop insurance options for organic growers

### Farmers' Market and Local Food Promotion Program<sup>92</sup>

- Farmers' Market and Local Food Promotion Program (Title X): formerly, funding was only used to support farmer-to-consumer promotion. The funding levels were tripled in 2014 Act and now include intermediaries, i.e. local and regional food enterprises that process, distribute, aggregate, store, and/or market locally or regionally produced food products. The program provides grants to nonprofits, local governments, producer associations, and other eligible organizations to help them improve and expand local and regional food marketing opportunities
- Incentivizes use of SNAP funds to purchase locally and regionally produced fruits and vegetables

### Rural Development<sup>93</sup>

- New Programs:
  - Value Added Agriculture Product Market Development Grants: provides competitive grants to agricultural producer to help them enter into value-added activities
  - Rural Gigawatt Network Pilot Program: provides grants, loans, and loan guarantees to providers to extend ultra-high-speed internet service to rural areas without broadband
  - Rural Business Development Grants: replaces Rural Business Enterprise Grant Program and Rural Business Opportunity Grant Program. Provides financing for small businesses and startups in rural areas.
- Rural Microentrepreneur Assistance Program (RMAP): direct loans to microenterprise development organizations to support the development and success of rural microentrepreneurs and microenterprises

### Energy<sup>94</sup>

- Biomass Crop Assistance Program (BCAP): provides funding for crop and woody biomass production and collection, harvest, storage and transportation.
- Rural Energy for America Program (REAP): provides financial assistance to agricultural producers and small businesses in rural communities to purchase, install, and construct renewable energy systems, make energy efficiency improvements to non-residential buildings and facilities, use renewable technologies that reduce energy consumption, and participate in energy audits and renewable energy development assistance<sup>95</sup>

<sup>91</sup> *Agricultural Act of 2014 - Organic Agriculture*. (2014, August). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/organic-agriculture.aspx#U-kanfldVEQ>

<sup>92</sup> *Agricultural Act of 2014 - Local and Regional Foods*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/local-and-regional-foods.aspx#VBCwnvldVEQ>

<sup>93</sup> *Agricultural Act of 2014 - Rural Development*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/rural-development.aspx#VBCxjvldVEQ>

<sup>94</sup> *Agricultural Act of 2014 - Energy*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/energy.aspx#VAICjvldVEQ>

<sup>95</sup> *Rural Development Energy Programs*. (2014, August 21). Retrieved from US Department of Agriculture - Rural Development: <http://www.rurdev.usda.gov/energy.html>

- Advanced Biofuel Payment Program: financial support to producers of advanced biofuels, including shrub willow.<sup>96</sup> The North Country has been identified as an ideal location to grow shrub willow for biofuel.
- Biorefinery, Renewable Chemical, and Biobased Product Manufacturing Assistance Program: loan guarantees for the development, construction and retrofitting of commercial-scale facilities<sup>96</sup>

### Support for Beginning Farmers and Ranchers and Military Veterans <sup>97</sup>

- Beginning Farmer or Rancher: farmer or rancher who has no more than 5 years of experience
- Conservation Reserve Program Transition Incentives Program: assists retired or retiring framers to transfer land to certain ranchers or farmers (primarily veterans, socially disadvantaged, or beginning)
- Beginning Farmer and Rancher Development Program: funds training, education, outreach, and technical assistance to beginning farmers and ranchers, with priority given to partnerships and collaborations led by or including non-governmental organizations
- Direct Farm Ownership Loan Program: loans to provide farmers and ranchers the opportunity to purchase farmland, construct or repair buildings, or make farm improvements. This program emphasizes participation from beginning farmers or ranchers.
  - Definition of a “qualified beginning farmer or rancher” has changed substantially and could allow more farmers and rancher to qualify. The new definition of a beginning farmer or rancher is one who has not operated a farm or ranch for more than 10 years, does not own a farm or ranch greater than 30% of the average size in the county, and substantially participates in operation
- Conservation Loan and Loan Guarantee Program: provides funds to farmers who want to implement conservation measures on their land but do not have the capital for upfront costs. Under the new bill, maximum conservation loan guarantee amount increased from 75% to 90%. This program emphasizes participation from beginning farmers or ranchers.
- Down Payment Loan Assistance: expands assistance to beginning farmers and ranchers seeking to purchase real property – maximum loan amount: \$300,000
- Beginning farmers and ranchers receive priority consideration for Value-Added Agriculture Product Market Development Grants
- Access to Crop Insurance
  - 10 percentage point reduction in insurance premiums
  - Exempting beginning farmers from paying \$300 administrative fee
  - 80% transitional yield as a substitute for low actual yields resulting from naturally occurring causes of loss
- Noninsured Crop Disaster Assistance Program
  - Catastrophic-level risk protection for beginning farmers who are producers of commodities that do not have an insurance product available
  - Reduces premiums on buy-up level coverage by 50% and waives application fee for new farmers and ranchers

<sup>96</sup> *Rural Development Energy Programs*. (2014, August 21). Retrieved from US Department of Agriculture - Rural Development: <http://www.rurdev.usda.gov/energy.html>

<sup>97</sup> All information sourced from the USDA Economic Research Service unless otherwise noted:

*Beginning Farmers and Ranchers*. (2014, April 11). Retrieved from US Department of Agriculture Economic Research Service: <http://www.ers.usda.gov/agricultural-act-of-2014-highlights-and-implications/beginning-farmers-and-ranchers.aspx#.VA6yvlDVEQ>

- Military Veterans Agricultural Liaison:
  - New position within USDA
  - Provides information to veterans about farming and connects them with farmer training programs

## Attachment C – 2012 Agriculture Census Data

Franklin County experienced a moderate increase in the number of farms between 2007 and 2012, rising 14% from 604 to 688. Meanwhile, the amount of farm acreage increased by 11% to approximately 145,000 acres in 2012. As a result, the average farm size declined slightly, potentially indicating that the new farms that opened during this period were likely small-scale farms.

Franklin County Farms			
	2007	2012	% Change
Total farms (number)	604	688	14%
Land in farms* (acres)	130,852	145,023	11%
Average farm size (acres)	217	211	(3%)

\* Not equal to total agricultural land. Omits large acreages of woodland or wasteland held for non-agricultural purposes

Source: Census of Agriculture

There were 304 farms under 100 acres, comprising almost half all farms but just 9% of all acreage. Of the 84 farms that were added between 2007 and 2012, 40 were between 50 and 69 acres, by far the largest category. The number of farms of this size doubled over the period. The largest farms—those over 2,000 acres—added the most acreage over this period, increasing by 6,863 acres.

Franklin County Farms and Farmland Acreage, by Size of Farm						
Size of Farm	Number of Farms			Farmland Acreage		
	2007	2012	Change	2007	2012	Change
1 to 9 acres	25	44	19	97	150	53
10 to 49 acres	132	114	(18)	3,472	2,994	(478)
50 to 69 acres	40	80	40	2,275	4,551	2,276
70 to 99 acres	61	66	5	5,021	5,473	452
100 to 139 acres	74	82	8	8,719	9,367	648
140 to 179 acres	51	74	23	8,072	11,612	3,540
180 to 219 acres	43	44	1	8,530	9,006	476
220 to 259 acres	40	40	0	9,434	9,369	(65)
260 to 499 acres	82	86	4	28,611	30,960	2,349
500 to 999 acres	35	38	3	23,263	24,649	1,386
1,000 to 1,999 acres	18	15	(3)	24,359	21,030	(3,329)
2,000 acres or more	3	5	2	8,999	15,862	6,863
<b>Total</b>	<b>604</b>	<b>688</b>	<b>84</b>	<b>130,852</b>	<b>145,023</b>	<b>14,171</b>

Source: Census of Agriculture

The total number of hired farm workers in Franklin County has remained steady since 2002, hovering around 650 workers. At the same time, the number of farms with hired workers, however, dipped between 2002 and 2007 from 192 to 155, but has since risen to 2002 levels. While significantly fewer farms hired workers in 2007, the number of workers hired remained virtually unchanged. It is interesting

to note that the number of farms hiring 10+ workers was cut in half in between 2002 and 2012, while there was also a decrease in the number farms hiring 1 or 2 workers.

Hired Farm Workers and Farms with Hired Labor, by Total Workers on Farm						
Number of Hired Workers on Farm	Workers			Farms*		
	2002	2007	2012	2002	2007	2012
1	85	53	64	85	53	64
2	102	70	82	51	35	41
3-4	76	79	151	23	24	47
5-9	74	182	156	11	29	27
10+	314	261	193	22	14	9
<b>Total</b>	<b>651</b>	<b>645</b>	<b>646</b>	<b>192</b>	<b>155</b>	<b>188</b>

\* Includes only farms with hired labor

Source: Census of Agriculture

Milk from cows accounted for \$57 million in sales, about two-thirds of all Franklin County agricultural product sales in 2012. This was significantly more than the second best-selling category of product, hay and other field crops, which accounted for \$7.5 million in sales. Other product categories with over \$1 million in sales included—in descending order—corn; cattle and calves; and vegetables, melons, potatoes, and sweet potatoes. Together, the top five product categories accounted for over 95% of Franklin County’s agricultural sales, though there were many other product varieties sold in 2012. While most product categories experienced an increase in sales between 2007 and 2012, the only three categories that declined were all related to animal products: cattle and calves; poultry and eggs; and hogs and pigs.

Franklin County - Top Agricultural Products by Sales (2012 Dollars)							
Product	2007 Sales+ (\$1,000)	2012 Sales (\$1,000)	Change (\$1,000)	% Change	2007 % of Total Sales	2012 % of Total Sales	2012 Rank (out of 62 NY Counties)
Milk from cows*	(NA)	\$57,010	--	--	--	67.7%	17
Hay and other field crops**	\$5,575	\$7,536	\$1,961	35%	7.4%	9.0%	12
Corn	\$1,466	\$6,481	\$5,015	342%	1.9%	7.7%	29
Cattle and calves	\$6,565	\$5,900	(\$665)	(10%)	8.7%	7.0%	25
Vegetables, melons, potatoes, and sweet potatoes	\$3,418	\$3,803	\$385	11%	4.5%	4.5%	20
Horses, ponies, mules, burros, and donkeys	\$52	\$572	\$520	999%	0.1%	0.7%	20
Soybeans	(D)	\$528	--	--	--	0.6%	32
Nursery, greenhouse, floriculture, and sod	\$455	\$491	\$36	8%	0.6%	0.6%	24
Other grains, oilseeds, dry beans, and dry peas***	\$147	\$323	\$176	119%	0.2%	0.4%	15
Maple syrup	(NA)	\$312	--	--	--	0.4%	13
Fruits, tree nuts, and berries	\$236	\$282	\$46	20%	0.3%	0.3%	33
Sheep and lambs	(NA)	\$267	--	--	--	0.3%	10
Poultry and eggs	\$110	\$83	(\$27)	(24%)	0.1%	0.1%	25
Hogs and pigs	\$128	\$80	(\$48)	(38%)	0.2%	0.1%	24
Cut Christmas trees and short-rotation woody crops	\$55	\$68	\$13	23%	0.1%	0.1%	27
Barley	\$0	\$20	\$20	--	0.0%	0.0%	7
Honey	(NA)	\$12	--	--	--	0.0%	25
Goats and kids	(NA)	\$11	--	--	--	0.0%	37
Wheat	(D)	\$8	--	--	--	0.0%	26
Wool	(NA)	\$1	--	--	--	0.0%	12
Rabbits	(NA)	\$1	--	--	--	0.0%	8
<b>Total (includes products not listed)</b>	<b>\$75,404</b>	<b>\$84,166</b>	<b>\$8,762</b>	<b>12%</b>			

+ Inflation-adjusted values. Reported in 2012 dollars.

(D) Withheld to avoid disclosing data for individual farms

\*\* May include crops such as grass seed, hay and grass silage, haylage, greenchop, hops, mint for oil, and others.

(NA) Not available

\*\*\* All grains, oilseeds, dry beans, and dry peas, excluding corn, wheat, soybeans, sorghum, barley, and rice.

Note: Products listed account for 99.6% of 2012 agricultural sales.

Source: Census of Agriculture, Camoin Associates



## Attachment D – Cluster Data

### Agriculture & Food Processing

#### Existing Conditions

Agribusiness & Food Processing Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. Per Est.	2013 Location Quotient
112000	Animal Production	620	62%	3%	15	41	4
312221	Cigarette Manufacturing	125	13%	1%	3	41	133
311513	Cheese Manufacturing	94	9%	0%	1	94	16
111000	Crop Production	87	9%	0%	3	29	0
115115	Farm Labor Contractors and Crew Leaders	27	3%	0%	0	n/a	1
115112	Soil Preparation, Planting, and Cultivating	16	2%	0%	0	n/a	2
424910	Farm Supplies Merchant Wholesalers	10	1%	0%	2	5.207	0.69
311611	Animal (except Poultry) Slaughtering	<10	n/a	n/a	0	n/a	0
311330	Confectionery Manufacturing from Purchased Chocolate	<10	n/a	n/a	0	n/a	0.15
115113	Crop Harvesting, Primarily by Machine	<10	n/a	n/a	0	n/a	0.25
115116	Farm Management Services	<10	n/a	n/a	0	n/a	0.42
311421	Fruit and Vegetable Canning	<10	n/a	n/a	0	n/a	0.12
424510	Grain and Field Bean Merchant Wholesalers	<10	n/a	n/a	0	n/a	0.11
311119	Other Animal Food Manufacturing	<10	n/a	n/a	1	n/a	0.40
424590	Other Farm Product Raw Material Merchant Wholesalers	<10	n/a	n/a	0	n/a	0.85
115114	Postharvest Crop Activities (except Cotton Ginning)	<10	n/a	n/a	0	n/a	0
311811	Retail Bakeries	<10	n/a	n/a	0	n/a	0.58
<b>Agribusiness &amp; Food Processing Cluster Total:</b>		<b>996</b>	<b>100%</b>	<b>4%</b>	<b>25</b>	<b>40</b>	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

#### Industry Data

##### Historic 2003-2013

Agribusiness & Food Processing Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
112000	Animal Production	462	519	620	158	34%
312221	Cigarette Manufacturing	0	0	125	125	n/a
311513	Cheese Manufacturing	55	81	94	38	69%
111000	Crop Production	122	145	87	-35	-29%
115115	Farm Labor Contractors and Crew Leaders	18	23	27	9	48%
115112	Soil Preparation, Planting, and Cultivating	<10	<10	16	n/a	n/a
424910	Farm Supplies Merchant Wholesalers	<10	<10	10	n/a	n/a

Agribusiness & Food Processing Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
311611	Animal (except Poultry) Slaughtering	<10	<10	<10	n/a	n/a
311330	Confectionery Manufacturing from Purchased Chocolate	0	<10	<10	n/a	n/a
115113	Crop Harvesting, Primarily by Machine	<10	<10	<10	n/a	n/a
115116	Farm Management Services	<10	<10	<10	n/a	n/a
311421	Fruit and Vegetable Canning	0	0	<10	n/a	n/a
424510	Grain and Field Bean Merchant Wholesalers	<10	0	<10	n/a	n/a
311119	Other Animal Food Manufacturing	<10	<10	<10	n/a	n/a
424590	Other Farm Product Raw Material Merchant Wholesalers	0	<10	<10	n/a	n/a
115114	Postharvest Crop Activities (except Cotton Ginning)	<10	<10	<10	n/a	n/a
311811	Retail Bakeries	<10	<10	<10	n/a	n/a
<b>Agribusiness &amp; Food Processing Cluster Total:</b>		<b>702</b>	<b>805</b>	<b>996</b>	<b>294</b>	<b>42%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Agribusiness & Food Processing Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
112000	Animal Production	620	695	75	12%
312221	Cigarette Manufacturing	125	155	30	24%
311513	Cheese Manufacturing	94	100	6	7%
111000	Crop Production	87	48	-39	-45%
115115	Farm Labor Contractors and Crew Leaders	27	29	2	7%
115112	Soil Preparation, Planting, and Cultivating	16	24	8	52%
424910	Farm Supplies Merchant Wholesalers	10	15	4	43%
311811	Retail Bakeries	<10	12	n/a	n/a
311611	Animal (except Poultry) Slaughtering	<10	<10	n/a	n/a
311330	Confectionery Manufacturing from Purchased Chocolate	<10	<10	n/a	n/a
115116	Farm Management Services	<10	<10	n/a	n/a
311421	Fruit and Vegetable Canning	<10	<10	n/a	n/a
424510	Grain and Field Bean Merchant Wholesalers	<10	<10	n/a	n/a
311119	Other Animal Food Manufacturing	<10	<10	n/a	n/a
424590	Other Farm Product Raw Material Merchant Wholesalers	<10	<10	n/a	n/a
115114	Postharvest Crop Activities (except Cotton Ginning)	<10	<10	n/a	n/a
115113	Crop Harvesting, Primarily by Machine	<10	0	n/a	n/a
<b>Agribusiness &amp; Food Processing Cluster Total:</b>		<b>996</b>	<b>1,088</b>	<b>92</b>	<b>9%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Occupation Data

Agribusiness & Food Processing Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
11-9013	Farmers, Ranchers, and Other Agricultural Managers	513	\$11.43	High school diploma or equivalent	None
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	114	\$10.21	Less than high school	Short-term on-the-job training
51-9111	Packaging and Filling Machine Operators and Tenders	23	\$12.98	High school diploma or equivalent	Moderate-term on-the-job training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	18	\$13.01	Less than high school	Short-term on-the-job training
51-3092	Food Batchmakers	16	\$15.37	High school diploma or equivalent	Moderate-term on-the-job training
53-7064	Packers and Packagers, Hand	13	\$10.86	Less than high school	Short-term on-the-job training
39-2011	Animal Trainers	13	\$10.37	High school diploma or equivalent	Moderate-term on-the-job training
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	12	\$7.54	Less than high school	Short-term on-the-job training
39-2021	Nonfarm Animal Caretakers	12	\$8.79	Less than high school	Short-term on-the-job training
45-2091	Agricultural Equipment Operators	10	\$12.28	Less than high school	Short-term on-the-job training
49-9071	Maintenance and Repair Workers, General	10	\$15.98	High school diploma or equivalent	Long-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	10	\$15.41	Postsecondary non-degree award	Short-term on-the-job training
43-3031	Bookkeeping, Accounting, and Auditing Clerks	8	\$15.64	High school diploma or equivalent	Moderate-term on-the-job training
51-2092	Team Assemblers	7	\$11.01	High school diploma or equivalent	Moderate-term on-the-job training
51-9198	Helpers--Production Workers	7	\$13.87	Less than high school	Short-term on-the-job training
51-1011	First-Line Supervisors of Production and Operating Workers	7	\$20.42	Postsecondary non-degree award	None
49-9041	Industrial Machinery Mechanics	7	\$15.84	High school diploma or equivalent	Long-term on-the-job training
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	7	\$15.21	High school diploma or equivalent	Moderate-term on-the-job training
11-1021	General and Operations Managers	7	\$34.37	Bachelor's degree	None
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	6	\$22.34	High school diploma or equivalent	None

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

Historic 2003-2013

Agribusiness & Food Processing Cluster – Historic Occupation Change (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
11-9013	Farmers, Ranchers, and Other Agricultural Managers	469	513	44	9%
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	67	114	47	70%
51-9111	Packaging and Filling Machine Operators and Tenders	8	23	15	188%
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6	18	12	200%
51-3092	Food Batchmakers	11	16	5	45%
53-7064	Packers and Packagers, Hand	5	13	8	160%
39-2011	Animal Trainers	10	13	3	30%
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	7	12	5	71%
39-2021	Nonfarm Animal Caretakers	7	12	5	71%
45-2091	Agricultural Equipment Operators	6	10	4	67%
49-9071	Maintenance and Repair Workers, General	3	10	7	233%
53-3032	Heavy and Tractor-Trailer Truck Drivers	6	10	4	67%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	6	8	2	33%
51-2092	Team Assemblers	1	7	6	600%
51-9198	Helpers--Production Workers	2	7	5	250%
51-1011	First-Line Supervisors of Production and Operating Workers	2	7	5	250%
49-9041	Industrial Machinery Mechanics	2	7	5	250%
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	1	7	6	600%
11-1021	General and Operations Managers	2	7	5	250%
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	4	6	2	50%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Agribusiness & Food Processing Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
11-9013	Farmers, Ranchers, and Other Agricultural Managers	513	546	33	6%
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	114	115	1	1%
51-9111	Packaging and Filling Machine Operators and Tenders	23	25	2	9%
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	18	21	3	17%

Agribusiness & Food Processing Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
51-3092	Food Batchmakers	16	17	1	6%
53-7064	Packers and Packagers, Hand	13	15	2	15%
39-2011	Animal Trainers	13	16	3	23%
45-2093	Farmworkers, Farm, Ranch, and Aquacultural Animals	12	12	0	0%
39-2021	Nonfarm Animal Caretakers	12	15	3	25%
45-2091	Agricultural Equipment Operators	10	11	1	10%
49-9071	Maintenance and Repair Workers, General	10	11	1	10%
53-3032	Heavy and Tractor-Trailer Truck Drivers	10	11	1	10%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	8	8	0	0%
51-2092	Team Assemblers	7	9	2	29%
51-9198	Helpers--Production Workers	7	8	1	14%
51-1011	First-Line Supervisors of Production and Operating Workers	7	8	1	14%
49-9041	Industrial Machinery Mechanics	7	10	3	43%
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	7	6	-1	-14%
11-1021	General and Operations Managers	7	8	1	14%
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	6	7	1	17%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Environmental Science & Biotechnology

### Existing Conditions

Environmental & Life Sciences Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. Per Est.	2013 Location Quotient
541990	All Other Professional, Scientific, and Technical Services	47	28%	0.20%	0	n/a	0.33
541711	Research and Development in Biotechnology	42	24%	0.17%	1	42	2.08
541690	Other Scientific and Technical Consulting Services	35	21%	0.15%	1	35	0.75
541620	Environmental Consulting Services	25	15%	0.11%	1.5	17	1.44
813312	Environment, Conservation and Wildlife Organizations	21	12%	0.09%	5	4	2.50
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	<10	n/a	n/a	0	n/a	0.02
<b>Environmental &amp; Life Sciences Cluster:</b>		<b>171</b>	<b>100%</b>	<b>0.72%</b>	<b>9</b>	<b>19</b>	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Industry Data

### Historic 2003-2013

Environmental & Life Sciences Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
541990	All Other Professional, Scientific, and Technical Services	72	76	47	-25	-35%
541711	Research and Development in Biotechnology	60	105	42	-18	-31%
541690	Other Scientific and Technical Consulting Services	<10	20	35	n/a	n/a
541620	Environmental Consulting Services	<10	90	25	n/a	n/a
813312	Environment, Conservation and Wildlife Organizations	<10	17	21	n/a	n/a
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	0	<10	<10	n/a	n/a
<b>Environmental &amp; Life Sciences Cluster:</b>		<b>140</b>	<b>308</b>	<b>171</b>	<b>31</b>	<b>22%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

### Projected 2013-2023

Environmental & Life Sciences Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
541990	All Other Professional, Scientific, and Technical Services	47	19	-28	-60%
541711	Research and Development in Biotechnology	42	17	-24	-59%
541690	Other Scientific and Technical Consulting Services	35	64	29	81%
541620	Environmental Consulting Services	25	24	-1	-3%
813312	Environment, Conservation and Wildlife Organizations	21	33	12	58%
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	<10	<10	n/a	n/a
<b>Environmental &amp; Life Sciences Cluster:</b>		<b>171</b>	<b>158</b>	<b>-13</b>	<b>-8%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Occupation Data

Environmental & Life Sciences Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
27-4021	Photographers	25	\$10.33	High school diploma or equivalent	Long-term on-the-job training
27-3091	Interpreters and Translators	8	\$17.53	Bachelor's degree	Short-term on-the-job training
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	7	\$14.46	High school diploma or equivalent	Short-term on-the-job training
13-1111	Management Analysts	7	\$26.85	Bachelor's degree	None
11-1021	General and Operations Managers	5	\$34.37	Bachelor's degree	None
43-9061	Office Clerks, General	5	\$12.56	High school diploma or equivalent	Short-term on-the-job training
11-9199	Managers, All Other	4	\$18.81	High school diploma or equivalent	None
41-3099	Sales Representatives, Services, All Other	4	\$46.18	High school diploma or equivalent	Short-term on-the-job training
43-3031	Bookkeeping, Accounting, and Auditing Clerks	4	\$15.64	High school diploma or equivalent	Moderate-term on-the-job training
13-1161	Market Research Analysts and Marketing Specialists	3	\$25.63	Bachelor's degree	None
27-3099	Media and Communication Workers, All Other	2	\$14.68	High school diploma or equivalent	Short-term on-the-job training
43-6011	Executive Secretaries and Executive Administrative Assistants	2	\$22.89	High school diploma or equivalent	None
43-4111	Interviewers, Except Eligibility and Loan	2	\$10.39	High school diploma or equivalent	Short-term on-the-job training
13-1041	Compliance Officers	2	\$34.36	Bachelor's degree	Moderate-term on-the-job training
13-2011	Accountants and Auditors	2	\$29.08	Bachelor's degree	None
13-1199	Business Operations Specialists, All Other	2	\$27.82	High school diploma or equivalent	None
43-1011	First-Line Supervisors of Office and Administrative Support Workers	2	\$23.34	High school diploma or equivalent	None
39-9021	Personal Care Aides	2	\$10.33	Less than high school	Short-term on-the-job training
21-1093	Social and Human Service Assistants	2	\$16.59	High school diploma or equivalent	Short-term on-the-job training
99-9999	Unclassified Occupation	2	\$12.31	N/A	N/A

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Historic 2003-2013*

Environmental & Life Sciences Cluster - Historic Occupation Change (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
27-4021	Photographers	39	25	-14	-36%
27-3091	Interpreters and Translators	11	8	-3	-27%
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3	7	4	133%
13-1111	Management Analysts	4	7	3	75%
11-1021	General and Operations Managers	2	5	3	150%
43-9061	Office Clerks, General	2	5	3	150%
11-9199	Managers, All Other	5	4	-1	-20%
41-3099	Sales Representatives, Services, All Other	2	4	2	100%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	1	4	3	300%
13-1161	Market Research Analysts and Marketing Specialists	2	3	1	50%
27-3099	Media and Communication Workers, All Other	3	2	-1	-33%
43-6011	Executive Secretaries and Executive Administrative Assistants	1	2	1	100%
43-4111	Interviewers, Except Eligibility and Loan	1	2	1	100%
13-1041	Compliance Officers	1	2	1	100%
13-2011	Accountants and Auditors	1	2	1	100%
13-1199	Business Operations Specialists, All Other	1	2	1	100%
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1	2	1	100%
39-9021	Personal Care Aides	0	2	2	--
21-1093	Social and Human Service Assistants	0	2	2	--
99-9999	Unclassified Occupation	0	2	2	--

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Environmental & Life Sciences Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
27-4021	Photographers	25	10	-15	-60%
27-3091	Interpreters and Translators	8	3	-5	-63%
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	7	8	1	14%
13-1111	Management Analysts	7	10	3	43%
43-9061	Office Clerks, General	5	6	1	20%
11-1021	General and Operations Managers	5	6	1	20%
41-3099	Sales Representatives, Services, All Other	4	5	1	25%
11-9199	Managers, All Other	4	2	-2	-50%
13-1161	Market Research Analysts and Marketing Specialists	3	4	1	33%



Environmental & Life Sciences Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
43-4051	Customer Service Representatives	3	4	1	33%
13-2011	Accountants and Auditors	2	3	1	50%
39-9021	Personal Care Aides	2	3	1	50%
21-1093	Social and Human Service Assistants	2	3	1	50%
99-9999	Unclassified Occupation	2	3	1	50%
27-3099	Media and Communication Workers, All Other	2	1	-1	-50%
41-9099	Sales and Related Workers, All Other	2	1	-1	-50%
19-1021	Biochemists and Biophysicists	2	1	-1	-50%
13-1151	Training and Development Specialists	1	2	1	100%
19-1022	Microbiologists	1	0	-1	-100%
19-4021	Biological Technicians	1	0	-1	-100%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Forestry & Wood Products

### Existing Conditions

Forestry & Wood Products Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. per Est.	2013 Location Quotient
113310	Logging	92	32%	0.4%	9	10	7.13
238350	Finish Carpentry Contractors	58	20%	0.2%	7	9	1.30
115310	Support Activities for Forestry	36	12%	0.2%	2	18	7.69
321113	Sawmills	25	9%	0.1%	3	8	2.19
337122	Nonupholstered Wood Household Furniture Manufacturing	17	6%	0.1%	1	17	2.99
238330	Flooring Contractors	16	5%	0.1%	1	16	0.67
238160	Roofing Contractors	<10	n/a	n/a	1	n/a	0.23
238130	Framing Contractors	<10	n/a	n/a	1	n/a	0.37
321999	All Other Miscellaneous Wood Product Manufacturing	<10	n/a	n/a	0	n/a	0.43
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	<10	n/a	n/a	0	n/a	0.04
321991	Manufactured Home (Mobile Home) Manufacturing	<10	n/a	n/a	1	n/a	2.59
321918	Other Millwork (including Flooring)	<10	n/a	n/a	0	n/a	0.33
321992	Prefabricated Wood Building Manufacturing	<10	n/a	n/a	0	n/a	1.52
238170	Siding Contractors	<10	n/a	n/a	1	n/a	1.11
321920	Wood Container and Pallet Manufacturing	<10	n/a	n/a	0	n/a	0.12

Forestry & Wood Products Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. per Est.	2013 Location Quotient
337110	Wood Kitchen Cabinet and Countertop Manufacturing	<10	n/a	n/a	2	n/a	0.58
321911	Wood Window and Door Manufacturing	<10	n/a	n/a	0	n/a	0.09
<b>Forestry &amp; Wood Products Cluster Total:</b>		<b>289</b>	<b>100%</b>	<b>1.2%</b>	<b>29</b>	<b>10</b>	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Industry Data

### Historic 2003-2013

Forestry & Wood Products Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
113310	Logging	91	123	92	1.32	1%
238350	Finish Carpentry Contractors	101	65	58	-43.47	-43%
115310	Support Activities for Forestry	16	37	36	20.02	126%
321113	Sawmills	48	25	25	-22.71	-48%
337122	Nonupholstered Wood Household Furniture Manufacturing	79	50	17	-61.77	-78%
238330	Flooring Contractors	<10	18	16	n/a	n/a
238160	Roofing Contractors	23	<10	<10	n/a	n/a
238130	Framing Contractors	19	31	<10	n/a	n/a
321999	All Other Miscellaneous Wood Product Manufacturing	<10	<10	<10	n/a	n/a
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	<10	<10	<10	n/a	n/a
321991	Manufactured Home (Mobile Home) Manufacturing	<10	<10	<10	n/a	n/a
321918	Other Millwork (including Flooring)	<10	<10	<10	n/a	n/a
321992	Prefabricated Wood Building Manufacturing	<10	<10	<10	n/a	n/a
238170	Siding Contractors	<10	<10	<10	n/a	n/a
321920	Wood Container and Pallet Manufacturing	<10	<10	<10	n/a	n/a
337110	Wood Kitchen Cabinet and Countertop Manufacturing	<10	11	<10	n/a	n/a
321911	Wood Window and Door Manufacturing	<10	<10	<10	n/a	n/a
337212	Custom Architectural Woodwork and Millwork Manufacturing	0	0	0	n/a	n/a
321912	Cut Stock, Resawing Lumber, and Planing	<10	0	0	n/a	n/a
423210	Furniture Merchant Wholesalers	<10	0	0	n/a	n/a
<b>Forestry &amp; Wood Products Cluster Total:</b>		<b>424</b>	<b>391</b>	<b>289</b>	<b>-135</b>	<b>-32%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI  
2014.2 Class of Worker

Projected 2013-2023

Forestry & Wood Products Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
113310	Logging	92	85	-7.28	-8%
238350	Finish Carpentry Contractors	58	46	-12.05	-21%
115310	Support Activities for Forestry	36	35	-0.92	-3%
321113	Sawmills	25	<10	n/a	n/a
337122	Nonupholstered Wood Household Furniture Manufacturing	17	<10	n/a	n/a
238330	Flooring Contractors	16	17	1.37	9%
238160	Roofing Contractors	<10	<10	n/a	n/a
238130	Framing Contractors	<10	<10	n/a	n/a
321999	All Other Miscellaneous Wood Product Manufacturing	<10	<10	n/a	n/a
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	<10	<10	n/a	n/a
321991	Manufactured Home (Mobile Home) Manufacturing	<10	<10	n/a	n/a
321918	Other Millwork (including Flooring)	<10	<10	n/a	n/a
321992	Prefabricated Wood Building Manufacturing	<10	<10	n/a	n/a
238170	Siding Contractors	<10	12	n/a	n/a
321920	Wood Container and Pallet Manufacturing	<10	<10	n/a	n/a
337110	Wood Kitchen Cabinet and Countertop Manufacturing	<10	10	n/a	n/a
321911	Wood Window and Door Manufacturing	<10	0	n/a	n/a
<b>Forestry &amp; Wood Products Cluster Total:</b>		<b>289</b>	<b>231</b>	<b>-58</b>	<b>-20%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI  
2014.2 Class of Worker

Occupation Data

Forestry & Wood Products Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
45-4022	Logging Equipment Operators	49	\$17.73	High school diploma or equivalent	Moderate-term on-the-job training
47-2031	Carpenters	24	\$13.73	High school diploma or equivalent	Apprenticeship
47-2061	Construction Laborers	18	\$13.21	Less than high school	Short-term on-the-job training
53-3032	Heavy and Tractor-Trailer Truck Drivers	13	\$15.41	Postsecondary non-degree award	Short-term on-the-job training

Forestry & Wood Products Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
51-7041	Sawing Machine Setters, Operators, and Tenders, Wood	10	\$12.13	High school diploma or equivalent	Short-term on-the-job training
11-9199	Managers, All Other	9	\$18.81	High school diploma or equivalent	None
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	8	\$22.34	High school diploma or equivalent	None
45-4021	Fallers	7	\$17.11	High school diploma or equivalent	Moderate-term on-the-job training
11-9021	Construction Managers	7	\$17.24	Bachelor's degree	Moderate-term on-the-job training
51-7011	Cabinetmakers and Bench Carpenters	7	\$10.58	High school diploma or equivalent	Moderate-term on-the-job training
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6	\$13.01	Less than high school	Short-term on-the-job training
39-2021	Nonfarm Animal Caretakers	6	\$8.79	Less than high school	Short-term on-the-job training
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	6	\$19.08	High school diploma or equivalent	None
39-2011	Animal Trainers	5	\$10.37	High school diploma or equivalent	Moderate-term on-the-job training
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4	\$14.46	High school diploma or equivalent	Short-term on-the-job training
11-9013	Farmers, Ranchers, and Other Agricultural Managers	4	\$11.43	High school diploma or equivalent	None
45-4011	Forest and Conservation Workers	4	\$13.10	High school diploma or equivalent	Moderate-term on-the-job training
45-4029	Logging Workers, All Other	4	\$13.63	High school diploma or equivalent	Moderate-term on-the-job training
43-9061	Office Clerks, General	4	\$12.56	High school diploma or equivalent	Short-term on-the-job training
51-2092	Team Assemblers	4	\$11.01	High school diploma or equivalent	Moderate-term on-the-job training

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Historic 2003-2013*

Forestry & Wood Products Cluster - Historic Occupation Change (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
45-4022	Logging Equipment Operators	47	49	2	4%
47-2031	Carpenters	40	24	-16	-40%
47-2061	Construction Laborers	17	18	1	6%
53-3032	Heavy and Tractor-Trailer Truck Drivers	13	13	0	0%

Forestry & Wood Products Cluster - Historic Occupation Change (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
51-7041	Sawing Machine Setters, Operators, and Tenders, Wood	16	10	-6	-38%
11-9199	Managers, All Other	6	9	3	50%
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	9	8	-1	-11%
45-4021	Fallers	8	7	-1	-13%
11-9021	Construction Managers	10	7	-3	-30%
51-7011	Cabinetmakers and Bench Carpenters	12	7	-5	-42%
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	11	6	-5	-45%
39-2021	Nonfarm Animal Caretakers	3	6	3	100%
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	12	6	-6	-50%
39-2011	Animal Trainers	3	5	2	67%
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	6	4	-2	-33%
11-9013	Farmers, Ranchers, and Other Agricultural Managers	5	4	-1	-20%
45-4011	Forest and Conservation Workers	1	4	3	300%
45-4029	Logging Workers, All Other	5	4	-1	-20%
43-9061	Office Clerks, General	8	4	-4	-50%
51-2092	Team Assemblers	10	4	-6	-60%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Forestry & Wood Products Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
45-4022	Logging Equipment Operators	49	46	-3	-6%
47-2031	Carpenters	24	20	-4	-17%
47-2061	Construction Laborers	18	20	2	11%
53-3032	Heavy and Tractor-Trailer Truck Drivers	13	14	1	8%
51-7041	Sawing Machine Setters, Operators, and Tenders, Wood	10	5	-5	-50%
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	8	5	-3	-38%
51-7011	Cabinetmakers and Bench Carpenters	7	5	-2	-29%
11-9021	Construction Managers	7	5	-2	-29%
45-4021	Fallers	7	3	-4	-57%
39-2021	Nonfarm Animal Caretakers	6	8	2	33%
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6	3	-3	-50%

Forestry & Wood Products Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	6	5	-1	-17%
39-2011	Animal Trainers	5	6	1	20%
45-4011	Forest and Conservation Workers	4	3	-1	-25%
45-4029	Logging Workers, All Other	4	3	-1	-25%
43-9061	Office Clerks, General	4	3	-1	-25%
47-2141	Painters, Construction and Maintenance	4	3	-1	-25%
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4	3	-1	-25%
51-2092	Team Assemblers	4	1	-3	-75%
43-3031	Bookkeeping, Accounting, and Auditing Clerks	3	2	-1	-33%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Health Care & Wellness

### Existing Conditions

Health & Wellness Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. Per Est.	2013 Location Quotient
622110	General Medical and Surgical Hospitals (Private)	1,112	33%	5%	2	556	1.91
623210	Residential Mental Retardation Facilities	541	16%	2%	14	39	9.65
621111	Offices of Physicians (except Mental Health Specialists)	342	10%	1%	26	13	1.00
624120	Services for the Elderly and Persons with Disabilities	229	7%	1%	12	19	1.33
446110	Pharmacies and Drug Stores	162	5%	1%	10	16	1.73
623220	Residential Mental Health and Substance Abuse Facilities	144	4%	1%	3	48	5.13
621420	Outpatient Mental Health and Substance Abuse Centers	114	3%	0%	4	28	4.25
624190	Other Individual and Family Services	101	3%	0%	9	11	1.55
623110	Nursing Care Facilities	72	2%	0%	2	36	0.33
621399	Offices of All Other Miscellaneous Health Practitioners	63	2%	0%	6	10	1.42
621610	Home Health Care Services	56	2%	0%	2	28	0.25
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	55	2%	0%	4	14	1.00
621210	Offices of Dentists	51	1%	0%	11	5	0.42

Health & Wellness Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. Per Est.	2013 Location Quotient
621910	Ambulance Services	44	1%	0%	4	11	1.87
623312	Homes for the Elderly	40	1%	0%	3	13	0.74
621498	All Other Outpatient Care Centers	33	1%	0%	1	33	1.97
812191	Diet and Weight Reducing Centers	32	1%	0%	2	16	4.92
624110	Child and Youth Services	31	1%	0%	2	16	1.08
424490	Other Grocery and Related Products Merchant Wholesalers	28	1%	0%	2	16	0.93
713990	All Other Amusement and Recreation Industries	25	1%	0%	4	6	0.74
621310	Offices of Chiropractors	18	1%	0%	4	5	0.80
621320	Offices of Optometrists	15	0%	0%	2	8	0.85
611710	Educational Support Services (Private)	15	0%	0%	1	15	0.51
713940	Fitness and Recreational Sports Centers	13	0%	0%	0	n/a	0.15
621391	Offices of Podiatrists	13	0%	0%	1	13	2.48
812199	Other Personal Care Services	12	0%	0%	0	n/a	0.32
339920	Sporting and Athletic Goods Manufacturing	<10	n/a	n/a	1	n/a	0.09
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	<10	n/a	n/a	0	n/a	0.10
446191	Food (Health) Supplement Stores	<10	n/a	n/a	0	n/a	0.09
446199	All Other Health and Personal Care Stores	<10	n/a	n/a	0	n/a	0.22
611620	Sports and Recreation Instruction (Private)	<10	n/a	n/a	0	n/a	0.16
621112	Offices of Physicians, Mental Health Specialists	<10	n/a	n/a	1	n/a	0.46
621330	Offices of Mental Health Practitioners (except Physicians)	<10	n/a	n/a	0	n/a	0.12
621410	Family Planning Centers	<10	n/a	n/a	2	n/a	2.73
621999	All Other Miscellaneous Ambulatory Health Care Services	<10	n/a	n/a	0	n/a	0.24
623990	Other Residential Care Facilities	<10	n/a	n/a	0	n/a	0.05
624210	Community Food Services	<10	n/a	n/a	0	n/a	0.15
813319	Other Social Advocacy Organizations	<10	n/a	n/a	2	n/a	0.63
<b>Health Care Cluster Total:</b>		<b>3,405</b>	<b>100%</b>	<b>14%</b>	<b>136</b>	<b>25</b>	

Health & Wellness Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. Per Est.	2013 Location Quotient

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Industry Data

### Historic 2003-2013

Health & Wellness Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
622110	General Medical and Surgical Hospitals (Private)	877	1,018	1,112	235	27%
623210	Residential Mental Retardation Facilities	498	537	541	42	8%
621111	Offices of Physicians (except Mental Health Specialists)	304	393	342	38	12%
624120	Services for the Elderly and Persons with Disabilities	286	285	229	-57	-20%
446110	Pharmacies and Drug Stores	134	159	162	28	21%
623220	Residential Mental Health and Substance Abuse Facilities	109	132	144	35	33%
621420	Outpatient Mental Health and Substance Abuse Centers	85	66	114	29	34%
624190	Other Individual and Family Services	69	70	101	32	47%
623110	Nursing Care Facilities	115	70	72	-43	-37%
621399	Offices of All Other Miscellaneous Health Practitioners	21	31	63	42	199%
621610	Home Health Care Services	75	125	56	-19	-25%
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	45	35	55	10	21%
621210	Offices of Dentists	56	49	51	-5	-9%
621910	Ambulance Services	20	40	44	24	120%
623312	Homes for the Elderly	44	56	40	-3	-8%
621498	All Other Outpatient Care Centers	43	55	33	-10	-24%
812191	Diet and Weight Reducing Centers	14	25	32	18	127%
624110	Child and Youth Services	<10	11	31	n/a	n/a
424490	Other Grocery and Related Products Merchant Wholesalers	12	28	28	16	136%
713990	All Other Amusement and Recreation Industries	<10	19	25	n/a	n/a
621310	Offices of Chiropractors	11	13	18	6	57%
621320	Offices of Optometrists	<10	13	15	n/a	n/a
611710	Educational Support Services (Private)	30	40	15	-15	-50%



Health & Wellness Cluster - Historic Change						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
713940	Fitness and Recreational Sports Centers	26	22	13	-12	-48%
621391	Offices of Podiatrists	<10	<10	13	n/a	n/a
812199	Other Personal Care Services	14	24	12	-1	-10%
813319	Other Social Advocacy Organizations	37	<10	<10	n/a	n/a
621330	Offices of Mental Health Practitioners (except Physicians)	14	17	<10	n/a	n/a
611620	Sports and Recreation Instruction (Private)	11	<10	<10	n/a	n/a
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	0	<10	<10	n/a	n/a
624210	Community Food Services	0	<10	<10	n/a	n/a
339920	Sporting and Athletic Goods Manufacturing	<10	<10	<10	n/a	n/a
446191	Food (Health) Supplement Stores	<10	<10	<10	n/a	n/a
446199	All Other Health and Personal Care Stores	<10	<10	<10	n/a	n/a
621112	Offices of Physicians, Mental Health Specialists	<10	<10	<10	n/a	n/a
621410	Family Planning Centers	<10	<10	<10	n/a	n/a
621999	All Other Miscellaneous Ambulatory Health Care Services	<10	<10	<10	n/a	n/a
623990	Other Residential Care Facilities	<10	<10	<10	n/a	n/a
621511	Medical Laboratories	<10	<10	0	n/a	n/a
621512	Diagnostic Imaging Centers	<10	<10	0	n/a	n/a
621991	Blood and Organ Banks	<10	<10	0	n/a	n/a
<b>Health Care Cluster Total:</b>		<b>3,008</b>	<b>3,377</b>	<b>3,405</b>	<b>397</b>	<b>13%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Health & Wellness Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
622110	General Medical and Surgical Hospitals (Private)	1,112	1,299	186	17%
623210	Residential Mental Retardation Facilities	541	652	111	21%
621111	Offices of Physicians (except Mental Health Specialists)	342	365	23	7%
624120	Services for the Elderly and Persons with Disabilities	229	205	-23	-10%
446110	Pharmacies and Drug Stores	162	195	33	20%
623220	Residential Mental Health and Substance Abuse Facilities	144	149	5	3%

Health & Wellness Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
621420	Outpatient Mental Health and Substance Abuse Centers	114	171	57	50%
624190	Other Individual and Family Services	101	167	66	65%
623110	Nursing Care Facilities	72	64	-9	-12%
621399	Offices of All Other Miscellaneous Health Practitioners	63	100	37	59%
621610	Home Health Care Services	56	46	-10	-18%
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	55	81	26	48%
621210	Offices of Dentists	51	63	12	24%
621910	Ambulance Services	44	58	14	31%
623312	Homes for the Elderly	40	38	-2	-5%
621498	All Other Outpatient Care Centers	33	41	8	24%
812191	Diet and Weight Reducing Centers	32	26	-6	-19%
624110	Child and Youth Services	31	57	26	81%
424490	Other Grocery and Related Products Merchant Wholesalers	28	29	1	4%
713990	All Other Amusement and Recreation Industries	25	37	12	49%
621310	Offices of Chiropractors	18	27	9	54%
621320	Offices of Optometrists	15	24	8	54%
611710	Educational Support Services (Private)	15	<10	n/a	n/a
713940	Fitness and Recreational Sports Centers	13	17	4	30%
621391	Offices of Podiatrists	13	19	5	40%
812199	Other Personal Care Services	12	<10	n/a	n/a
621410	Family Planning Centers	<10	15	n/a	n/a
339920	Sporting and Athletic Goods Manufacturing	<10	<10	n/a	n/a
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	<10	<10	n/a	n/a
446191	Food (Health) Supplement Stores	<10	<10	n/a	n/a
446199	All Other Health and Personal Care Stores	<10	<10	n/a	n/a
611620	Sports and Recreation Instruction (Private)	<10	<10	n/a	n/a
621112	Offices of Physicians, Mental Health Specialists	<10	<10	n/a	n/a
621330	Offices of Mental Health Practitioners (except Physicians)	<10	<10	n/a	n/a
621999	All Other Miscellaneous Ambulatory Health Care Services	<10	<10	n/a	n/a
623990	Other Residential Care Facilities	<10	<10	n/a	n/a
624210	Community Food Services	<10	<10	n/a	n/a
813319	Other Social Advocacy Organizations	<10	<10	n/a	n/a
621511	Medical Laboratories	0	<10	n/a	n/a
<b>Health Care Cluster Total:</b>		<b>3,405</b>	<b>3,979</b>	<b>574</b>	<b>17%</b>

Health & Wellness Cluster - Projected Change					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

### Occupation Data

Health & Wellness Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
29-1141	Registered Nurses	373	\$29.52	Associate's degree	None
39-9021	Personal Care Aides	349	\$10.33	Less than high school	Short-term on-the-job training
31-1011	Home Health Aides	269	\$10.41	Less than high school	Short-term on-the-job training
31-1014	Nursing Assistants	158	\$13.28	Postsecondary non-degree award	None
29-2061	Licensed Practical and Licensed Vocational Nurses	105	\$18.27	Postsecondary non-degree award	None
43-4171	Receptionists and Information Clerks	81	\$11.03	High school diploma or equivalent	Short-term on-the-job training
21-1093	Social and Human Service Assistants	71	\$16.59	High school diploma or equivalent	Short-term on-the-job training
43-9061	Office Clerks, General	57	\$12.56	High school diploma or equivalent	Short-term on-the-job training
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	56	\$14.46	High school diploma or equivalent	Short-term on-the-job training
11-9111	Medical and Health Services Managers	50	\$37.64	Bachelor's degree	None
19-3031	Clinical, Counseling, and School Psychologists	49	\$26.36	Doctoral or professional degree	Internship/residency
29-1069	Physicians and Surgeons, All Other	49	\$89.45	Doctoral or professional degree	Internship/residency
37-2012	Maids and Housekeeping Cleaners	43	\$10.68	Less than high school	Short-term on-the-job training
21-1011	Substance Abuse and Behavioral Disorder Counselors	43	\$16.56	High school diploma or equivalent	Moderate-term on-the-job training
31-1013	Psychiatric Aides	42	\$20.32	High school diploma or equivalent	Short-term on-the-job training
41-2011	Cashiers	41	\$8.79	Less than high school	Short-term on-the-job training
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	39	\$11.87	Less than high school	Short-term on-the-job training
29-1051	Pharmacists	38	\$61.69	Doctoral or professional degree	None
43-4111	Interviewers, Except Eligibility and Loan	38	\$10.39	High school diploma or equivalent	Short-term on-the-job training

Health & Wellness Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
29-2052	Pharmacy Technicians	37	\$13.16	High school diploma or equivalent	Moderate-term on-the-job training

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Historic 2003-2013*

Health & Wellness Cluster - Historic Occupation Change (20 largest)						
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change	
29-1141	Registered Nurses	302	373	71	24%	
39-9021	Personal Care Aides	355	349	-6	-2%	
31-1011	Home Health Aides	259	269	10	4%	
31-1014	Nursing Assistants	155	158	3	2%	
29-2061	Licensed Practical and Licensed Vocational Nurses	100	105	5	5%	
43-4171	Receptionists and Information Clerks	69	81	12	17%	
21-1093	Social and Human Service Assistants	63	71	8	13%	
43-9061	Office Clerks, General	55	57	2	4%	
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	51	56	5	10%	
11-9111	Medical and Health Services Managers	42	50	8	19%	
19-3031	Clinical, Counseling, and School Psychologists	36	49	13	36%	
29-1069	Physicians and Surgeons, All Other	42	49	7	17%	
37-2012	Maids and Housekeeping Cleaners	39	43	4	10%	
21-1011	Substance Abuse and Behavioral Disorder Counselors	29	43	14	48%	
31-1013	Psychiatric Aides	34	42	8	24%	
41-2011	Cashiers	36	41	5	14%	
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	33	39	6	18%	
29-1051	Pharmacists	31	38	7	23%	
43-4111	Interviewers, Except Eligibility and Loan	33	38	5	15%	
29-2052	Pharmacy Technicians	30	37	7	23%	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Health & Wellness Cluster - Projected Occupation Change (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
29-1141	Registered Nurses	373	441	68	18%
39-9021	Personal Care Aides	349	369	20	6%

31-1011	Home Health Aides	269	306	37	14%
31-1014	Nursing Assistants	158	175	17	11%
29-2061	Licensed Practical and Licensed Vocational Nurses	105	111	6	6%
43-4171	Receptionists and Information Clerks	81	93	12	15%
21-1093	Social and Human Service Assistants	71	88	17	24%
43-9061	Office Clerks, General	57	61	4	7%
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	56	63	7	13%
11-9111	Medical and Health Services Managers	50	59	9	18%
19-3031	Clinical, Counseling, and School Psychologists	49	68	19	39%
29-1069	Physicians and Surgeons, All Other	49	55	6	12%
37-2012	Maids and Housekeeping Cleaners	43	48	5	12%
21-1011	Substance Abuse and Behavioral Disorder Counselors	43	57	14	33%
31-1013	Psychiatric Aides	42	46	4	10%
41-2011	Cashiers	41	47	6	15%
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	39	45	6	15%
29-1051	Pharmacists	38	47	9	24%
43-4111	Interviewers, Except Eligibility and Loan	38	41	3	8%
29-2052	Pharmacy Technicians	37	49	12	32%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Tourism, Culture, & Recreation

### Existing Conditions

Tourism and Culture Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. per Est.	2013 Location Quotient
722110	Full-Service Restaurants	396	25%	2%	42	10	0.61
722211	Limited-Service Restaurants	346	22%	1%	28	13	0.68
721110	Hotels (except Casino Hotels) and Motels	179	11%	1%	12	15	0.87
711510	Independent Artists, Writers, and Performers	118	7%	0%	0	472	0.77
722410	Drinking Places (Alcoholic Beverages)	92	6%	0%	17	6	1.61
713910	Golf Courses and Country Clubs	63	4%	0%	4	16	1.23
722213	Snack and Nonalcoholic Beverage Bars	57	4%	0%	7	8	0.78
712110	Museums	46	3%	0%	3	15	4.11
713950	Bowling Centers	38	2%	0%	5.25	7	3.67
721214	Recreational and Vacation Camps (except Campgrounds)	26	2%	0%	5	5	5.16
713990	All Other Amusement and Recreation Industries	25	2%	0%	4.25	6	0.74
721211	RV (Recreational Vehicle) Parks and Campgrounds	24	2%	0%	3.75	6	4.51

Tourism and Culture Cluster - Current Employment and Establishments							
NAICS	Description	2013 Jobs	% of Cluster	% of Franklin Jobs	2013 Est.	Emp. per Est.	2013 Location Quotient
713930	Marinas	21	1%	0%	2	10	2.75
713920	Skiing Facilities	19	1%	0%	1.5	13	3.95
515112	Radio Stations	18	1%	0%	4	5	1.40
721199	All Other Traveler Accommodation	18	1%	0%	5	4	7.51
713940	Fitness and Recreational Sports Centers	13	1%	0%	0	n/a	0.15
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	10	1%	0%	2	6	0.75
713110	Amusement and Theme Parks	10	1%	0%	2	7	0.47
339920	Sporting and Athletic Goods Manufacturing	<10	n/a	n/a	1	n/a	0.09
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	<10	n/a	n/a	0	n/a	0.10
487210	Scenic and Sightseeing Transportation, Water	<10	n/a	n/a	0	n/a	0.21
512110	Motion Picture and Video Production	<10	n/a	n/a	1	n/a	0.19
512131	Motion Picture Theaters (except Drive-Ins)	<10	n/a	n/a	1	n/a	0.35
512210	Record Production	<10	n/a	n/a	0	n/a	1.84
512230	Music Publishers	<10	n/a	n/a	0	n/a	1.57
512240	Sound Recording Studios	<10	n/a	n/a	0	n/a	1.38
515120	Television Broadcasting	<10	n/a	n/a	0	n/a	0.06
561510	Travel Agencies	<10	n/a	n/a	0	n/a	0.30
711110	Theater Companies and Dinner Theaters	<10	n/a	n/a	0	n/a	0.30
711130	Musical Groups and Artists	<10	n/a	n/a	0	n/a	0.09
711211	Sports Teams and Clubs	<10	n/a	n/a	0	n/a	0.13
711212	Racetracks	<10	n/a	n/a	0	n/a	0.17
711219	Other Spectator Sports	<10	n/a	n/a	0	n/a	0.34
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	<10	n/a	n/a	0	n/a	0.55
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	<10	n/a	n/a	0	n/a	0.21
713120	Amusement Arcades	<10	n/a	n/a	0	n/a	0.96
713290	Other Gambling Industries	<10	n/a	n/a	0	n/a	0.24
721191	Bed-and-Breakfast Inns	<10	n/a	n/a	0	n/a	1.19
<b>Tourism and Culture Cluster</b>		<b>1,580</b>	<b>100%</b>	<b>7%</b>	<b>149</b>	<b>11</b>	

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

## Industry Data

*Historic 2003-2013*

Tourism and Culture Cluster - Historic Growth						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
722110	Full-Service Restaurants	572	394	396	-176	-44%
722211	Limited-Service Restaurants	324	304	346	22	6%
721110	Hotels (except Casino Hotels) and Motels	160	98	179	20	11%
711510	Independent Artists, Writers, and Performers	107	103.23	118	11	10%
722410	Drinking Places (Alcoholic Beverages)	91	48.254	92	1	1%
713910	Golf Courses and Country Clubs	48	54.236	63	15	23%
722213	Snack and Nonalcoholic Beverage Bars	17	88.913	57	39	70%
712110	Museums	<10	36.697	46	n/a	n/a
713950	Bowling Centers	13	26	38	24	65%
721214	Recreational and Vacation Camps (except Campgrounds)	20	34	26	6	22%
713990	All Other Amusement and Recreation Industries	<10	18.915	25	n/a	n/a
721211	RV (Recreational Vehicle) Parks and Campgrounds	13	13	24	11	45%
713930	Marinas	20	<10	21	0	1%
713920	Skiing Facilities	129	14.664	19	-109	-570%
515112	Radio Stations	21	20	18	-2	-14%
721199	All Other Traveler Accommodation	<10	<10	18	n/a	n/a
713940	Fitness and Recreational Sports Centers	26	22	13	-12	-91%
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	<10	<10	10	n/a	n/a
713110	Amusement and Theme Parks	0	0	10	10	100%
339920	Sporting and Athletic Goods Manufacturing	<10	<10	<10	n/a	n/a
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	0	<10	<10	n/a	n/a
487210	Scenic and Sightseeing Transportation, Water	<10	<10	<10	n/a	n/a
512110	Motion Picture and Video Production	<10	<10	<10	n/a	n/a
512131	Motion Picture Theaters (except Drive-Ins)	10	<10	<10	n/a	n/a
512210	Record Production	0	0	<10	n/a	n/a
512230	Music Publishers	0	0	<10	n/a	n/a
512240	Sound Recording Studios	0	<10	<10	n/a	n/a
515120	Television Broadcasting	0	0	<10	n/a	n/a
561510	Travel Agencies	<10	<10	<10	n/a	n/a
711110	Theater Companies and Dinner Theaters	<10	0	<10	n/a	n/a
711130	Musical Groups and Artists	<10	0	<10	n/a	n/a
711211	Sports Teams and Clubs	<10	<10	<10	n/a	n/a
711212	Racetracks	<10	<10	<10	n/a	n/a
711219	Other Spectator Sports	16	16	<10	n/a	n/a
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	<10	<10	<10	n/a	n/a

Tourism and Culture Cluster - Historic Growth						
NAICS	Description	2003 Jobs	2008 Jobs	2013 Jobs	2003 - 2013 # Change	2003 - 2013 % Change
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	<10	<10	<10	n/a	n/a
713120	Amusement Arcades	<10	28	<10	n/a	n/a
713290	Other Gambling Industries	0	0	<10	n/a	n/a
721191	Bed-and-Breakfast Inns	<10	<10	<10	n/a	n/a
<b>Tourism and Culture Cluster</b>		<b>2,004</b>	<b>1,393</b>	<b>1,580</b>	<b>-424</b>	<b>-27%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Tourism and Culture Cluster - Projected Growth					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
722110	Full-Service Restaurants	396	399	3	1%
722211	Limited-Service Restaurants	346	395	49	14%
721110	Hotels (except Casino Hotels) and Motels	179	224	45	25%
711510	Independent Artists, Writers, and Performers	118	137	19	16%
722410	Drinking Places (Alcoholic Beverages)	92	98	5	6%
713910	Golf Courses and Country Clubs	63	81	19	30%
722213	Snack and Nonalcoholic Beverage Bars	57	62	6	10%
712110	Museums	46	81	35	76%
713950	Bowling Centers	38	55	18	47%
721214	Recreational and Vacation Camps (except Campgrounds)	26	34	8	32%
713990	All Other Amusement and Recreation Industries	25	37	12	49%
721211	RV (Recreational Vehicle) Parks and Campgrounds	24	36	12	51%
713930	Marinas	21	33	12	59%
713920	Skiing Facilities	19	<10	n/a	n/a
515112	Radio Stations	18	31	13	69%
721199	All Other Traveler Accommodation	18	22	5	27%
713940	Fitness and Recreational Sports Centers	13	17	4	30%
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	10	20	9	91%
713110	Amusement and Theme Parks	10	26	15	149%
512110	Motion Picture and Video Production	<10	11	n/a	n/a
339920	Sporting and Athletic Goods Manufacturing	<10	<10	n/a	n/a



Tourism and Culture Cluster - Projected Growth					
NAICS	Description	2013 Jobs	2023 Jobs	2013 - 2023 # Change	2013 - 2023 % Change
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	<10	<10	n/a	n/a
487210	Scenic and Sightseeing Transportation, Water	<10	<10	n/a	n/a
512131	Motion Picture Theaters (except Drive-Ins)	<10	<10	n/a	n/a
512210	Record Production	<10	<10	n/a	n/a
512230	Music Publishers	<10	<10	n/a	n/a
512240	Sound Recording Studios	<10	<10	n/a	n/a
515120	Television Broadcasting	<10	<10	n/a	n/a
561510	Travel Agencies	<10	<10	n/a	n/a
711110	Theater Companies and Dinner Theaters	<10	<10	n/a	n/a
711130	Musical Groups and Artists	<10	<10	n/a	n/a
711211	Sports Teams and Clubs	<10	<10	n/a	n/a
711212	Racetracks	<10	<10	n/a	n/a
711219	Other Spectator Sports	<10	<10	n/a	n/a
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	<10	<10	n/a	n/a
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	<10	<10	n/a	n/a
713120	Amusement Arcades	<10	<10	n/a	n/a
713290	Other Gambling Industries	<10	<10	n/a	n/a
721191	Bed-and-Breakfast Inns	<10	<10	n/a	n/a
<b>Tourism and Culture Cluster</b>		<b>1,580</b>	<b>1,871</b>	<b>291</b>	<b>18%</b>

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

### Occupation Data

Tourism and Culture Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	245	\$9.62	Less than high school	Short-term on-the-job training
35-3031	Waiters and Waitresses	213	\$8.68	Less than high school	Short-term on-the-job training
35-3011	Bartenders	89	\$9.86	Less than high school	Short-term on-the-job training
35-2014	Cooks, Restaurant	79	\$11.05	Less than high school	Moderate-term on-the-job training

Tourism and Culture Cluster - Occupation Analysis (20 largest)					
SOC	Description	2013 Jobs	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	59	\$15.95	High school diploma or equivalent	None
35-9021	Dishwashers	57	\$8.94	Less than high school	Short-term on-the-job training
37-2012	Maids and Housekeeping Cleaners	54	\$10.68	Less than high school	Short-term on-the-job training
35-2021	Food Preparation Workers	38	\$10.93	Less than high school	Short-term on-the-job training
11-9081	Lodging Managers	34	\$14.99	High school diploma or equivalent	None
27-2042	Musicians and Singers	34	\$18.63	High school diploma or equivalent	Long-term on-the-job training
37-3011	Landscaping and Groundskeeping Workers	33	\$11.60	Less than high school	Short-term on-the-job training
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	30	\$9.34	Less than high school	Short-term on-the-job training
41-2011	Cashiers	27	\$8.79	Less than high school	Short-term on-the-job training
35-2011	Cooks, Fast Food	26	\$8.92	Less than high school	Short-term on-the-job training
11-9051	Food Service Managers	25	\$11.74	High school diploma or equivalent	None
27-3043	Writers and Authors	25	\$13.17	Bachelor's degree	Moderate-term on-the-job training
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	23	\$11.87	Less than high school	Short-term on-the-job training
39-9032	Recreation Workers	22	\$11.52	Bachelor's degree	None
43-4081	Hotel, Motel, and Resort Desk Clerks	21	\$11.24	High school diploma or equivalent	Short-term on-the-job training
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	20	\$9.33	Less than high school	Short-term on-the-job training

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Historic 2003-2013*

Tourism and Culture Cluster - Historic Occupation Growth (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	204	245	40	20%
35-3031	Waiters and Waitresses	311	213	-98	-32%
35-3011	Bartenders	110	89	-21	-19%
35-2014	Cooks, Restaurant	111	79	-32	-29%

Tourism and Culture Cluster - Historic Occupation Growth (20 largest)					
SOC	Description	2003 Jobs	2013 Jobs	# Change	% Change
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	65	59	-6	-9%
35-9021	Dishwashers	80	57	-23	-29%
37-2012	Maids and Housekeeping Cleaners	51	54	3	6%
35-2021	Food Preparation Workers	48	38	-10	-20%
11-9081	Lodging Managers	34	34	0	-1%
27-2042	Musicians and Singers	27	34	7	25%
37-3011	Landscaping and Groundskeeping Workers	49	33	-16	-32%
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	45	30	-16	-35%
41-2011	Cashiers	45	27	-19	-41%
35-2011	Cooks, Fast Food	27	26	-1	-4%
11-9051	Food Service Managers	35	25	-10	-30%
27-3043	Writers and Authors	26	25	-1	-4%
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	32	23	-9	-29%
39-9032	Recreation Workers	<10	22	n/a	n/a
43-4081	Hotel, Motel, and Resort Desk Clerks	19	21	2	11%
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	25	20	-5	-20%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

*Projected 2013-2023*

Tourism and Culture Cluster - Projected Occupation Growth (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	245	292	47	19%
35-3031	Waiters and Waitresses	213	217	4	2%
35-3011	Bartenders	89	97	8	9%
35-2014	Cooks, Restaurant	79	86	7	9%
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	59	66	7	12%
35-9021	Dishwashers	57	58	1	2%
37-2012	Maids and Housekeeping Cleaners	54	69	16	29%
35-2021	Food Preparation Workers	38	40	2	5%
11-9081	Lodging Managers	34	35	1	2%
27-2042	Musicians and Singers	34	40	6	18%
37-3011	Landscaping and Groundskeeping Workers	33	40	7	21%
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	30	32	2	7%

Tourism and Culture Cluster - Projected Occupation Growth (20 largest)					
SOC	Description	2013 Jobs	2023 Jobs	# Change	% Change
41-2011	Cashiers	27	31	5	17%
35-2011	Cooks, Fast Food	26	29	2	9%
11-9051	Food Service Managers	25	24	0	-2%
27-3043	Writers and Authors	25	26	2	7%
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	23	32	9	40%
39-9032	Recreation Workers	22	34	12	56%
43-4081	Hotel, Motel, and Resort Desk Clerks	21	27	6	30%
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	20	22	2	10%

Source: QCEW Employees, Non-QCEW Employees, Self-Employed & Extended Proprietors - EMSI 2014.2 Class of Worker

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## Attachment C – County Profile Summary

## Franklin County Profile

Note: This information from the Franklin County 2005–2009 CEDS and has been updated as necessary.

### County Economic Development Tools

While Franklin County does not have an economic development or planning department, the Franklin County IDA provides many economic development services. In addition, businesses and residents of Franklin County have access to a variety of local, regional, and state resources.

**Franklin County IDA:** The Franklin County IDA serves new and existing businesses to create and retain quality jobs and facilitate new investment in Franklin County. The IDA offers a variety of financing resources, including bonding, Payment in Lieu of Taxes (PILOT), and tax abatements. The IDA also owns and operates Tupper Lake and Chateaugay Business Parks and can assist companies seeking a commercial or industrial site within Franklin County.

**Malone OneWorkSource Center:** The Malone OneWorkSource Center is part of the North Country Regional Workforce Investment Board (WIB) network. Through its affiliation with other centers in the region and state and national programs, the center provides comprehensive services to job seekers and businesses in the region. For individuals, the center provides job seeker services, interviewing and resume writing assistance, workforce skills training, and information about unemployment insurance and supportive services. The Center can also connect businesses to job seekers, customized training, job-based tax credits, and on-the-job training services for new hires.

**Higher education:** Franklin County is home to higher education resources and is at the center of a regional network of quality universities. Paul Smith's College is a private college located in Franklin County specializing in culinary arts, hospitality, natural resources management, and biology. The North Country Community College has locations in Malone and Saranac Lake (in Essex County) that provides education services in the region. Finally, there are four-year universities located throughout the North Country, including Clarkson University, SUNY Potsdam, and SUNY Plattsburgh.

**Other Economic Development Resources:** CITEC offers business development services to businesses throughout the North Country including operations, plant management, human resources, marketing, sales, new product development, financing, and training. CITEC is also part of a nationwide network of Manufacturing Extension Partnership (MEP) centers that work with small and mid-sized US manufacturers. Adirondack–North Country Association also provides business and community development services to communities in the North Country and Adirondack region.

**Other Financing Resources:** In addition to financing available through the IDA and the workforce center, New York State and the North Country Regional Economic Development Council also offer financing to businesses in the forms of loans, tax abatement, grants, and other programs.

## Transportation Infrastructure

### Highways

According to the New York State Department of Transportation, 1,420 miles of road run through Franklin County. The primary roadways in the county are State Routes 11, 3, and 30. No major interstate highways run through the county.

Approximate Distances to Major Interstates		
Population Centers	Distance to I-87	Distance to I-81
Malone	45 miles	97 miles
Tupper Lake	60 miles	96 miles
Saranac Lake	40 miles	115 miles

### Passenger Transportation

Within Franklin County, public bus transportation is provided by the Franklin County Department of Transportation. Separate bus routes run in the northern and southern portions of the county with the Adirondack Route connecting the two. Bus transportation outside of the county is also provided by Adirondack Trailways, with a station in Malone, and Greyhound, with stations in Malone and Saranac Lake, to limited locations. Franklin County is not served currently by Amtrak or other passenger rail services.

### Water

Franklin County businesses can access US and Canadian markets through the Seaway System port in Ogdensburg. The Seaway System is part of the larger “Highway H2O” which connects the Atlantic Ocean to the St. Lawrence River and ultimately the Great Lakes.

### Airports

While Franklin County is not home to a major commercial airport, there are several airports located throughout the immediate region and beyond.

Approximate Distances to Major Airports					
Population Centers	Massena International Airport	Plattsburgh International Airport	Montreal-Trudeau Airport	Ottawa International Airport	Burlington International Airport
Malone	35 miles	54 miles	65 miles	93 miles	105 miles
Tupper Lake	72 miles	74 miles	126 miles	124 miles	91 miles
Saranac Lake	67 miles	53 miles	114 miles	137 miles	71 miles

### Rail

Rail access in Franklin County is limited, with one station located at Fort Covington on the Franklin County/Canada border. This station is operated by CSX, which has rail lines throughout New York State.

## Sewer and Water

Franklin County is served by a range of water systems. The county is home to 18 community water systems, serving populations that range in size from 40 to 13,000. In addition, 80 non-community water systems also services the county’s residents, businesses, and public institutions. These systems serve populations ranging in size from 25 to 1,600. Six municipal sewage systems serve the county.

## Energy and Utilities

The primary electricity provider for Franklin County is National Grid. Small parts of the eastern portion of the county are served by New York State Energy and Gas Corporation (NYSEG). These utility providers do not provide natural gas services to the county at this time.

Franklin County is positioned to capitalize on alternative energy sources. The Village of Malone is currently considering plans to install seven acres of solar panels, energy from which will be fed into the existing electric grid. The county can also capitalize on trends in biomass energy, especially if the Chateaugay ReEnergy plant is able to reopen. Franklin County is also home to a wind energy farm in Chateaugay, NY.

## Telecommunications

The New York State Broadband Program Office has conducted three rounds of financing to improve broadband capacity throughout the state. In two out of three rounds, Franklin County has been a part of a region that received funds. Most recently, the North Country was awarded \$6,000,000 to fund projects that bring broadband to unserved residents and businesses in the region.

## Environment and Geography

Franklin County is nearly 1,700 square miles and is located along the northern border of NYS and Canada. The largest town in Franklin County, Malone, is located just outside of the Adirondack Park and is also the county seat. A large portion of the county is located within the “Blue Line” of the Adirondack Park which offers significant recreational and natural resources opportunities. Also located within Franklin Count is the St. Regis Mohawk Reservation.

The county has a plethora of natural resources including lakes, streams, mountains, and forest. The quality of water, soil, and air was identified during the SWOT analysis as being a major strength for Franklin County. Some of the resources include: Lake Flower, Upper St. Regis Lake, Raquette Pond, Haystak Mountain, McKenzie Mountain, Scarface Mountain, and many others.



## Attachment D – SWOT Analysis



## 2014 Franklin County CEDS – Draft SWOT Analysis

<b>Strengths</b>	<b>Weaknesses</b>
<p><b>PRIORITIES</b></p> <p><b>Agriculture</b></p> <ul style="list-style-type: none"> <li>• Good soil – high organic/mineral content</li> <li>• High quality dairy/cheese production</li> <li>• Available and inexpensive land</li> </ul> <p><b>Education (NCCC/Paul Smiths/BOCES)</b></p> <ul style="list-style-type: none"> <li>• Community college can develop workforce programs quickly</li> </ul> <p><b>St. Regis Mohawk Reservation</b></p> <ul style="list-style-type: none"> <li>• Casino tourism</li> </ul> <p><b>Value Added Industries</b></p> <ul style="list-style-type: none"> <li>• Agriculture</li> <li>• Plastics</li> <li>• Wood products</li> </ul> <p><b>Environment</b></p> <ul style="list-style-type: none"> <li>• Natural beauty; quality of life</li> <li>• UN designated as a biosphere reserve</li> <li>• Adirondack Park</li> <li>• Clean air and water</li> <li>• Old growth forests</li> <li>• Proximity to Environmental Educational Resources (WC, PSC, Clarkson, Potsdam, Plattsburgh, UVM, etc)</li> </ul> <p><b>Tourism Amenities &amp; Location to Markets (Tourism Advisory Council should oversee*)</b></p> <ul style="list-style-type: none"> <li>• Big Tupper Ski Area – Adirondack Club &amp; Resort</li> <li>• Natural History Museum of the Adirondacks (The Wild Center) &amp; Paul Smith’s Visitor Interpretive Center</li> <li>• Skiing, golfing, canoeing, hiking</li> <li>• Proximity to travel markets including Montreal, Ottawa and NYC metro area</li> <li>• Rail in place – (improvement from Saranac Lake to Lake Placid)</li> </ul> <p><b>People</b></p> <ul style="list-style-type: none"> <li>• Hardworking workforce (lacking skills)</li> <li>• Diversified culture</li> <li>• Community spirit of helping</li> </ul>	<p><b>PRIORITIES</b></p> <p><b>Competing in highly competitive and/or slowing/declining industries</b></p> <ul style="list-style-type: none"> <li>• Value added Ag and wood</li> </ul> <p><b>Lack of Economic Development Capacity</b></p> <ul style="list-style-type: none"> <li>• No County Planning Board/Department</li> <li>• Lack of County mechanism, funding or capacity for economic development implementation</li> </ul> <p><b>Location</b></p> <ul style="list-style-type: none"> <li>• Distance to significant markets – national and global (Transportation infrastructure - distance from airports and highway major interstates)</li> <li>• Regional competition for business investment - (i.e. Plattsburgh has larger labor pool, available sites, air, highway and rail and proximity to Montreal)</li> <li>• Lack of mass transit opportunities to access region</li> <li>• North/South Divide</li> </ul> <p><b>Workforce</b></p> <ul style="list-style-type: none"> <li>• Small skilled labor pool and aging workers</li> <li>• Brain drain: educated young people leaving area</li> <li>• Inadequate workforce programs – programs need to be integrated with K-12 education</li> <li>• Dependence on government employment</li> </ul> <p><b>Significant Development Projects are Costly</b></p> <ul style="list-style-type: none"> <li>• Adirondack Park regulations (perception of APA) and national environmental organization involvement</li> <li>• Legal challenges may deter future investment</li> </ul> <p><b>Essential Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Lodging facilities – in need of investment or unable to meet the demands of today’s traveler</li> <li>• Technology: need high quality broadband</li> <li>• Cell access (fill in gaps)</li> <li>• East/West Highway</li> <li>• Natural Gas</li> <li>• Recreational – Tourism Related Infrastructure</li> <li>• Seasonal economy (Tourism does not provide year-round employment)</li> </ul>

<p><b>OTHER</b></p> <ul style="list-style-type: none"><li>• Technology infrastructure is improving</li><li>• Relatively low violent crime rate</li></ul>	<p><b>OTHER</b></p> <p><b>Technical Educational Institution(s) or Programs</b></p> <ul style="list-style-type: none"><li>• Lack of educational, financial and network support for higher tech start-ups and/or other living wage jobs</li></ul> <p><b>Agriculture</b></p> <ul style="list-style-type: none"><li>• Not enough slaughterhouses in area</li><li>• NYS does not have its own meat inspection process (other states do)</li><li>• NYS ranked 49<sup>th</sup> for “friendliness to agriculture”</li><li>• Farmers need more technical assistance/point of contact at government</li><li>• “Big Dairy” parceling and buying up land</li></ul> <p><b>Expense</b></p> <ul style="list-style-type: none"><li>• NYS taxation, especially business taxes</li><li>• High energy costs</li><li>• High property taxes - as a percent of income</li><li>• Schools expensive, taxes too high, services not provided that are wanted/needed</li></ul> <p><b>Communities</b></p> <ul style="list-style-type: none"><li>• Blight in all communities</li><li>• Lack of connections between assets including recreational, educational, financial, organizational and others.</li><li>• Not enough effort to develop assets that are lacking (e.g. sports complex to attract youth sports)</li><li>• Perception issue of Franklin County: news about area seems negative</li><li>• Minimal entrepreneurial culture and support</li></ul>
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Opportunities	Threats
<p><b>PRIORITIES</b></p> <p><b>Create Office of Economic Development/Planning Services in Southern End of County</b></p> <ul style="list-style-type: none"> <li>• Tupper Lake</li> </ul> <p><b>Agriculture</b></p> <ul style="list-style-type: none"> <li>• Value-added agricultural products</li> <li>• Exporting agricultural products</li> <li>• Reuse potential of the by-products of agriculture operations</li> <li>• Medical marijuana industry: leverage agricultural land and history of health and wellness to grow medical marijuana</li> </ul> <p><b>Growing Bio-Tech Cluster</b></p> <ul style="list-style-type: none"> <li>• Trudeau/Clarkson partnership</li> <li>• Expand partnership and collaboration</li> <li>• Create spin off opportunities and firms</li> <li>• Commercialization of products and/or research</li> <li>• Expand recognition of the area for cutting edge research</li> </ul> <p><b>Tourism*</b></p> <ul style="list-style-type: none"> <li>• Youth athletic tournaments/related visitation</li> <li>• Canadian market</li> <li>• Environmental education based (Natural History Museum, Adirondack Public Observatory, regional University Environmental Science programs, etc.)</li> <li>• NYS DOT Remsen-Lake Placid Rail Corridor</li> <li>• Tie into Lake Placid tourism, growing Saratoga/Warren County markets and Finger Lakes region traveler desires based on prior survey results</li> <li>• Interplay between Ag/Tourism (tours, etc.)</li> <li>• Interest in local foods and agri-tourism</li> <li>• Cooperative marketing within Tri-Lakes (SL-TL-LP)</li> <li>• Goodman Mountain (new trail – hiking)</li> <li>• Adirondacks as part of labeling/branding</li> <li>• Tourist conversion: tourists build second home in Franklin</li> <li>• St. Regis Mohawk Reservation and Casino: more integrated with community, interested in promoting local businesses</li> <li>• Cultural tourism – Mohawk reservation</li> <li>• Windmill tourism</li> <li>• Historical assets</li> </ul>	<p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Franklin County’s fiscal situation</li> <li>• Penal reform (reduction in prison population, employment and perhaps additional prison layoffs and closings)</li> <li>• Global Competition - Forestry &amp; Agriculture industries – global competition for providing the natural resources and value added production, becoming more mechanized – need fewer employees</li> <li>• Unfavorable Canadian/U.S. Dollar exchange rate trends can reduce margins for Franklin County businesses</li> <li>• Drug infiltration with youth</li> </ul> <p><b>Changes to Health Care Industry</b></p> <ul style="list-style-type: none"> <li>• Healthcare reform and financial issues (cost/lack of) potentially leading to hospital closures or reduction in providers</li> <li>• Cost of healthcare increasing</li> <li>• Shrinking health care infrastructure</li> <li>• Fewer jobs in healthcare facilities</li> <li>• Hard to recruit healthcare providers: other parts of the country are more attractive for the workers</li> </ul> <p><b>OTHER</b></p> <ul style="list-style-type: none"> <li>• Changing demographics of the northeast: need more diversity in Franklin County</li> <li>• Population of Franklin County is aging – declining population</li> <li>• Lack of administrative skill sets and organizational capability that can provide resources to all.</li> <li>• Potential cut backs at Ft. Drum</li> </ul>

- Increased spending in tourism and recreation industries
- Passage of Occupancy Tax

**OTHER**

- Natural Environmental laboratory, growth in Environmental Science and numerous degree/programs across North Country
- Capitalize on maple production growth
- Wood pellet production
- Made in New York regulations (for hops and other products)
- Redevelopment of Chateaugay Prison
- Higher gas price in Canada
- Investment from Canada
- EB-5 Immigrant Investor Program
- Attract younger populations

# Attachment E – Plan Implementation Benchmarking Guidance

## Introduction

Critical to success in economic development planning is measuring, tracking and reporting performance on actions. Plans are based on a “snapshot in time” and while they consider historical and projected trends, regional economies are constantly changing and evolving due to local, regional, national, and global events. It is important to build in a process for regular review and reporting of measures that are designed to track progress and use this information to make regular adjustments to the plan. For Franklin County, the process for tracking and measuring performance should be based on the following criteria:

- **How often?** – Track annually to review measures, assess meaning, and make adjustments to strategies and action plans.
- **By whom?** – This is best accomplished by economic development staff working with a small advisory committee of stakeholders that are interested in and knowledgeable of economic development data and analysis, then reporting to the larger steering committee for review of findings and adjustments to plans, actions, priorities, and policies.
- **How it is used?** – Use results to communicate progress internally (among staff and officials) as well as externally to citizens, taxpayers, and stakeholders.

## Measures

Below are measures for each of the strategy and action areas. These are a mix of input, output and outcome measures. *Input measures* track the effort or resources being put into a program or activity, such as staff hours and funding. *Output measures* include the actual programs or activities that have occurred and are meant to affect change such as site visits and clients/businesses served. *Outcome measures* are the resulting improvements in key economic indicators such as employment, wages, and income.

## Targeted Industries

The economic plan recommends industries and related subsectors, which include:

- Agriculture and Food Products
- Forestry and Wood Products
- Health Care and Wellness
- Environmental Science and Biotechnology
- Tourism

For these industries, Franklin County should annually track and report on:

- Establishment levels and growth – how many businesses are there in the sectors and how has this changed from the previous year?
- Employment levels and growth – how many employees are there in the sectors and how has this changed from the previous year?

- Average wage levels and growth – what are averages wages in the sectors and how has this changed from the previous year?
- Key occupation levels, growth and projected growth – what are the key occupations in the sectors, how has this changed from the previous year?

Data for these measures is available from the following sources:

- New York State Department of Labor, Division of Labor Statistics – <http://labor.ny.gov/stats/index.shtm>
- Economic Modeling Specialists Intl. (EMSI) – requires fee for subscription and was used by Camoin Associates for the CEDS analysis. Data combines reporting from federal Department of Labor and Bureau of Economic Analysis – [www.economicmodeling.com](http://www.economicmodeling.com)

### Items from Actions Matrix

The CEDS also has recommended specific projects and actions resulting from the analysis and stakeholder engagement process. What follows are recommendations for how the IDA can measure work associated with the CEDS by goal. These are simply recommendations and should be reviewed and revised regularly.

#### **Goal 1: Improve the County’s Economic Development Climate and Implementation Capacity**

- Make efforts towards establishing a new or restructured economic development organization.
- Accomplish private fundraising to support economic development efforts in the county. Raise \$300,000 in year 1, \$500,000 in year 2, and \$750,000 in year 3.

#### **Goal 2: Promote an Entrepreneurial Culture**

- Establish one new start-up funding source per year to support new businesses and small business expansions.
- Develop one entrepreneurial event/program per year for school-aged residents.
- Host at least two entrepreneur events per year.

#### **Goal 3: Support Legacy Industries in Retention and Expansion**

##### *Agriculture and Value-Added Food Processing*

- Establish one new funding stream directed towards agriculture and related industries and/or establishing the technical assistance position.
- Provide support for four regular meetings of members of the industry.
- Help two Franklin County producers get their product to a new market.
- Assist the Agricultural Technical Assistance position in initiating regular communication through the use of a newsletter to those in the agriculture and food products industry.

##### *Forestry and Wood Products*

- Establish one pilot project to transition a major energy user to biofuel.
- Host one informational meeting about transitioning to biofuel, work with NYSERDA to provide the training information.

### *Health Care and Wellness*

- Measure the number of trained health care professionals that graduate from Franklin County educational programs.
- Host one event to bring together organizations from around the industry to discuss training issues.

#### **Goal 4: Support the Emerging Environmental Science and Biotechnology Cluster**

- Conduct periodic communication with Trudeau to see if there are areas where support is needed.
- Hold two meetings to move the environmental research center concept forward.

#### **Goal 5: Enhance Tourism Opportunities Throughout the County**

- Establish a specific funding stream that is designated for lodging and/or hospitality focused facilities.
- Support 2 new lodging or visitor facilities in the county in some way (financial, technical, or some other type of assistance).

## Additional Actions

In addition to implementing the plan through Franklin County resources, priority projects identified through this CEDS process should be submitted the North Country Regional Economic Development Council in order to be incorporated into the Regional Priority Project list for funding. The action items identified in this plan intentionally line up with the goals set by the North Country Regional Economic Development Council and submitting the plans for priority project status will showcase the efforts being made in Franklin County to further the Regional Council's identified goals.

## Attachment F – Glossary of Terms

CCE	Cornell Cooperative Extension
CEDS	Comprehensive Economic Development Strategy
EDO	Economic Development Organization
FCSWCD	Franklin County Soil and Water Conservation District
IDA	Industrial Development Agency
LDC	Local Development Corporation
NCCC	North County Community College
NCREDC	North County Regional Economic Development Council
NYS DAM	New York State Department of Agriculture and Markets
NYSERDA	New York State Energy Research and Development Agency
SBDC	Small Business Development Center
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TAC	Tourism Advisory Committee
USDA	United States Department of Agriculture
VIC	Visitor Interpretive Center
WIB	Workforce Investment Board





# Attachment G – New Economic Development Organization Structure Chart



## Attachment H – Priority Project List

The following section identifies the vital projects, programs and activities that address Franklin County's greatest needs.

Strategy 1.1: Establish an organization with additional capacity for county level economic development planning and implementation

Strategy 1.2: Provide public officials with training and information related to economic development

Strategy 1.3: Enhance existing business retention, expansion and attraction efforts

Strategy 1.4: Review all infrastructure for necessary improvements and upgrades

Strategy 2.1: Coordinate and host an entrepreneurship summit

Strategy 2.2: Attract startups to Franklin County and nurture resident entrepreneurs

Strategy 3.11: Research the feasibility of a Food Hub with commercial kitchen and greenhouses

Strategy 3.12: Establish an agriculture technical assistance position

Strategy 3.31: Hold an annual regional health care industry summit

Strategy 3.32: Continue to utilize technology to improve the health care system

Strategy 4.1: Establish an Environmental Science and Biotechnology Advisory Committee

Strategy 4.2: Establish a Center of Excellence for Lyme and other Tick-borne Diseases at the Trudeau Institute

Strategy 4.3: Establish a Center of Excellence for Immunoengineering at the Trudeau Institute

Strategy 4.5: Invest in workforce development initiatives based on career pathways geared towards positions related to the cluster

Strategy 5.1: Support the completion of the Tourism Advisory Committee's Destination Master Plan

Strategy 5.2: Pass legislation to establish an occupancy tax

Strategy 5.3: Support the upgrade of existing and building of new lodging and dining options

Strategy 5.4: Develop Franklin County as a year-round tourism destination

## Attachment I – EDA Requirement References

Technical requirements for a CEDS as defined in 13 CRF 303.7:

- 1- Background of the economic development situation: See Attachment A and Attachment C
- 2- In-depth analysis of economic and community development problems: See Attachment A, Attachment B, and Attachment D
- 3- Section setting forth goals and objectives: See pages 8-17
- 4- Discussion of community and private sector participation in CEDS effort: See list of Steering Committee members and page 2.
- 5- Section listing all suggested Projects: See Action Plan Matrix
- 6- Section identifying priority projects: See Attachment I
- 7- Section identifying economic clusters: See Attachment B
- 8- A plan of action to implement the goals and objectives: See Action Plan Matrix
- 9- A list of performance measures: See Attachment E
- 10- A section outlining methodology for cooperating and integrating the CEDS with state priorities: See Attachment E “Additional Actions” section

