

**CITY OF WATERTOWN, NEW YORK
AGENDA**

This shall serve as notice that the next regularly scheduled meeting of the City Council will be held on Monday, December 17, 2012, at 7:00 p.m. in the City Council Chambers, 245 Washington Street, Watertown, New York.

MOMENT OF SILENCE

PLEDGE OF ALLEGIANCE

ROLL CALL

ADOPTION OF MINUTES

COMMUNICATIONS

PRESENTATION

Parks and Recreation Reservation Software – Vermont Systems – Brian Hatch

PRIVILEGE OF THE FLOOR

RESOLUTIONS

- Resolution No. 1 - Appointment of Commissioner of Deeds
- Resolution No. 2 - Authorizing Acceptance of Gift of Use of Vehicle, F.X. Caprara Car Companies
- Resolution No. 3 - Waiving Building Permit Fees for the Woolworth Building Redevelopment Project
- Resolution No. 4 - Authorizing the Sale of the Iron Block/Woodruff II Site
- Resolution No. 5 - Supporting JCIDA Incentives for the Woolworth Redevelopment Project
- Resolution No. 6 - Approving Supplemental Appropriation No. 2 For Fiscal Year 2012-13 for Various Accounts
- Resolution No. 7 - Accepting Waterline Easement and Utility Easement Between the City Of Watertown and Thousand Islands Hospitality, LLC

Resolution No. 8 - Establishing 2013 County Tax Rate

ORDINANCES

Ordinance No. 1 - Amending the Code of the City of Watertown,
§310-34, Accessory Uses in Residence Districts

LOCAL LAW

PUBLIC HEARING

OLD BUSINESS

STAFF REPORTS

1. Property Auction
2. Jefferson County Comprehensive Economic Development Strategy

NEW BUSINESS

EXECUTIVE SESSION

WORK SESSION

ADJOURNMENT

**NEXT REGULARLY SCHEDULED CITY COUNCIL MEETING IS MONDAY,
JANUARY 7, 2013.**

Res No. 1

December 4, 2012

To: The Honorable Mayor and City Council
From: Ann M. Saunders, City Clerk
Subject: Commissioner of Deeds

Watertown Housing Authority has submitted additional applications for appointment to Commissioner of Deeds. Attached for City Council consideration is a resolution appointing these non-City employees as Commissioner of Deeds for the City of Watertown for a two-year term ending December 31, 2014.

RESOLUTION

Page 1 of 1

Appointment of Commissioner of Deeds

Introduced by

Council Member BURNS, Roxanne M.

Council Member BUTLER, Joseph M. Jr.

Council Member MACALUSO, Teresa R.

Council Member SMITH, Jeffrey M.

Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

WHEREAS Commissioner of Deeds in the cities of this state shall be appointed by the common councils of such cities, and

WHEREAS Commissioner of Deeds shall hold the term of two years, and

WHEREAS Any person who resides in or maintains an office or other place of business in any such city and who resides in the county in which said city is situated shall be eligible to appointment,

NOW THEREFORE BE IT RESOLVED that the following individuals are hereby appointed Commissioner of Deeds for the term expiring December 31, 2014.

Non-City Employees

- Ellen E. Burns
- Lori A. Nevers
- Christine M. Wells
- Melissa Snyder
- Tina Buzzell

Seconded by

Res No. 2

December 10, 2012

To: The Honorable Mayor and City Council
From: Sharon Addison, City Manager
Subject: Authorizing Acceptance of Gift of Use of Vehicle,
F.X. Caprara Car Companies

F.X. Caprara Car Companies has offered to the City of Watertown the use of a 2012 Dodge Ram 4x4 for use by the Watertown Police Department's D.A.R.E. program. This is a no cost offer for approximately nine months. The City will be responsible for insuring and maintaining the vehicle and providing the vehicle marking. The former D.A.R.E. vehicle gifted to the City has been returned and the department is in need of a new vehicle.

Attached for Council consideration is a resolution accepting this gift from F.X. Caprara Car Companies.

Page 1 of 1

Authorizing Acceptance of Gift of Use of Vehicle, F.X. Caprara Car Companies

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

Introduced by

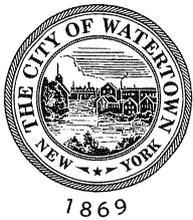
WHEREAS F.X. Caprara Car Companies has offered to provide the City of Watertown with a 2012 Dodge Ram 4x4 truck for use as a DARE vehicle by the Watertown Police Department, and

WHEREAS the Dodge Ram would be given to the City for its use for a term of approximately nine months, and

WHEREAS the Watertown Police Department is in need of a new vehicle for the DARE Program,

NOW THEREFORE BE IT RESOLVED that the City Council of the City of Watertown hereby accepts this gift of use of a 2012 Dodge Ram 4x4 truck from F.X. Caprara Car Companies.

Seconded by



City of Watertown, New York
Police Department

Metro-Jeff Public Safety Building
751 Waterman Drive
Watertown, NY 13601

Phone (315) 786-2610
Fax (315) 786-2613
wpd@watertown-ny.gov



Gary R. Comins
CHIEF OF POLICE

December 10, 2012

To: City Manager Sharon Addison
From: Police Chief G.R. Comins
Subject: Donation of DARE Vehicle



Enclosed is correspondence from the F.X. Caprara Car Company and a memorandum from Officer Jason Badalato regarding the donation of a vehicle for use in the department's DARE program. Various car dealerships around the area have been donating vehicles for our use in the program since 1997. This year, F.X. Caprara would like to donate a 2012 Dodge Ram, 4x4. The vehicle will be insured by the city, used for approximately 9 months and then returned for re-evaluation by the dealership.

Sincerely,

Chief G.R. Comins



December 7, 2012

To: City of Watertown, Watertown Police Department

From: FX Caprara Car Company

Subject: D.A.R.E. vehicle

The FX Caprara Car Company would like to donate a vehicle to the City of Watertown for use in the Watertown Police Department's D.A.R.E. program. The vehicle is a 2012 Dodge Ram 1500, 4x4, black in color, Vin# 3C6JD7ATOCG280245.

FX Caprara Car Company is offering this vehicle until August 31, 2013. At the end of the term FX Caprara Car Company will take the vehicle back and at that time we will re-evaluate the program for another term.

FX Caprara Auto Sales
18712 US Route 11
Watertown, NY 13601
315-782-8436

FX Caprara Kia
18675 US Route 11
Watertown, NY 13601
315-788-5427

FX Caprara Volkswagen
18493 US Route 11
Watertown, NY 13601
315-788-8989

FX Caprara Dodge Chrysler Jeep Ram
44170 NYS Route 12
Alexandria Bay, Ny 13607
315-482-7400

FX Caprara Chevrolet-Buick
3326 Maple Ave
Pulaski, NY 13142
315-298-5181

FX Caprara Ford-Mercury
5141 US Route 11
Pulaski, NY 13142
315-298-5114

FX Caprara Fiat of Watertown
18712 US Route 11
Watertown, NY 13601
315-782-8436

FX Caprara Chrysler Dodge Jeep Ram
18476 US Route 11
Watertown, NY 13601
315-788-7400

**WATERTOWN POLICE DEPARTMENT
INTER-OFFICE MEMORANDUM**

Date: December 7, 2012
To: Chief Gary Comins
From: Officer Jason Badalato
Subject: DARE Vehicle from FX Caprara

The FX Caprara Car Company is going to donate a vehicle to the City of Watertown for the DARE Program.

The vehicle will be donated for use until August, 31, 2013. At that time, FX Caprara will take back the vehicle and re-evaluate the program. It will be the City of Watertown's responsibility to provide insurance for the vehicle.

The vehicle is a 2012 Dodge Ram 1500, vin #3C6JD7AT0CG280245.

Res Nos. 3, 4, 5

December 11, 2012

To: The Honorable Mayor and City Council
From: Kenneth A. Mix, Planning and Community Development Coordinator
Subject: Actions Supporting the Redevelopment of the Woolworth Building

At the December 3, 2012 City Council Meeting, Mayor Jeffrey Graham requested that a resolution be drafted approving the requests made by the developers of the Woolworth Building. Separate resolutions have been drafted for their three requests.

The first resolution waives building permit fees for the redevelopment project.

The second resolution authorizes the sale of the Iron Block/Woodruff II Site for \$1. The resolution is written so that the sale will only take place if the project obtains all its financing, the property will be transferred back to the City if the project is not constructed and the property may only be resold to the City for the price paid to the City unless the City Council approves the sale to another entity. As a sale of real property, this resolution will require four “yea” votes to pass.

The third resolution endorses incentives the Jefferson County Industrial Development Agency may offer and states that the City Council is willing to accept a reasonable Payment in Lieu of Taxes (PILOT) Agreement.

RESOLUTION

Page 1 of 1

Waiving Building Permit Fees for the Woolworth Building Redevelopment Project

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.
 Total

YEA	NAY

Introduced by

WHEREAS the Woolworth Building at 11 Public Square is currently vacant and unproductive, and

WHEREAS the redevelopment of the Woolworth Building is an important component of the City of Watertown’s Downtown Revitalization efforts, and

WHEREAS a joint venture of David Gallo of Georgica Green Ventures LLC and Erich Seber of White Birch Enterprise LLC is proposing to renovate the Woolworth Building into 11,100 square feet of commercial space on the first floor and 50 units of housing on the upper floors, and

WHEREAS the City Council desires to take actions necessary to assist the proposed project in becoming a reality, and

WHEREAS one such action is the waiving of Building Permit Fees,

NOW THEREFORE BE IT RESOLVED the City Council hereby waives Building Permit Fees for the Woolworth Building Redevelopment Project proposed by David Gallo and Erich Seber.

Seconded by

RESOLUTION

Page 1 of 2

Authorizing the Sale of the Iron Block/
Woodruff II Site to David Gallo and Erich Seber

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

Introduced by

WHEREAS the Woolworth Building at 11 Public Square is currently vacant and unproductive, and

WHEREAS the redevelopment of the Woolworth Building is an important component of the City of Watertown’s downtown revitalization efforts, and

WHEREAS a joint venture of David Gallo of Georgica Green Ventures LLC and Erich Seber of White Birch Enterprise LLC is proposing to renovate the Woolworth Building into 11,100 square feet of commercial space on the first floor and 50 units of housing on the upper floors, and

WHEREAS the City Council desires to take actions necessary to assist the proposed project in becoming a reality, and

WHEREAS the developer has identified the need for parking spaces dedicated to the project, and

WHEREAS there is available nearby land owned by the City of Watertown, known at the Iron Block/Woodruff II Site, including 29 Public Square, 31 Public Square, 35-39 Public Square and a portion of 41 Public Square, and

WHEREAS said real property has never been assigned a public purpose by the City Council,

RESOLUTION

Page 2 of 2

Authorizing the Sale of the Iron Block/
Woodruff II Site to David Gallo and Erich Seber

Council Member BURNS, Roxanne M.
Council Member BUTLER, Joseph M. Jr.
Council Member MACALUSO, Teresa R.
Council Member SMITH, Jeffrey M.
Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

NOW THEREFORE BE IT RESOLVED by the City Council of the City of Watertown that pursuant to §23(b) of the General City Law, §247 of the Charter of the City of Watertown as amended by Local Law No. 1 of 1985, adopted December 3, 1984, effective January 17, 1985, and the Ordinance, Municipal Code, Chapter 16 adopted by the City Council on June 6, 1977, that the offer of \$1.00 submitted by David Gallo and Erich Seber for the purchase of Parcels No. 7-01-116, 7-01-114, 7-01-113 and the non-shaded portion of 7-01-112.001 as shown on Exhibit A, attached herewith, is a fair and reasonable offer and is hereby accepted, and

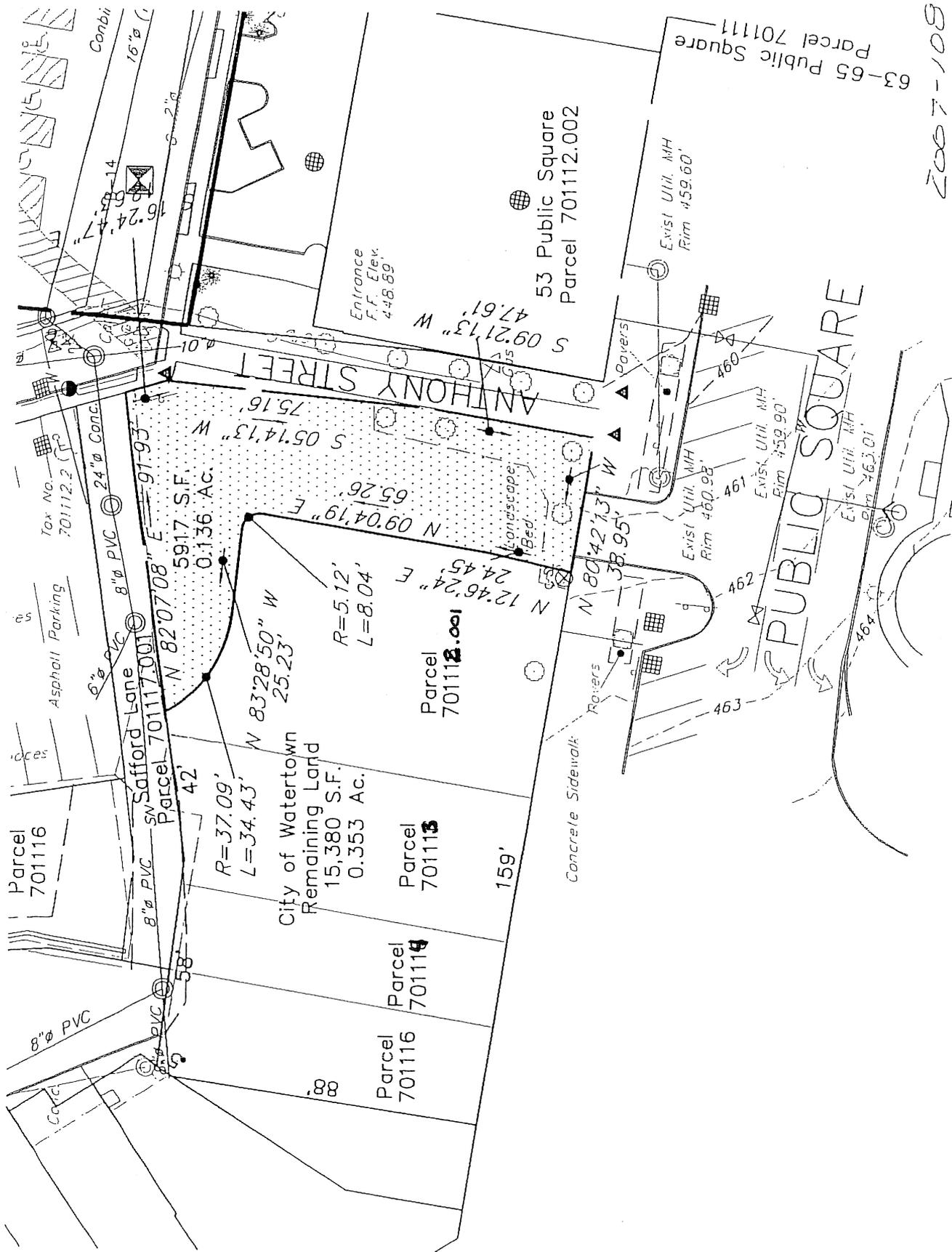
BE IT FURTHER RESOLVED that the sale/transfer shall not take place until all financing for the Woolworth Redevelopment Project is in place, and

BE IT FURTHER RESOLVED that the deed issued by the City shall contain provisions that the property must be re-transferred to the City if the redevelopment of the Woolworth Building is not completed within three years of the date of the deed and that the property may not be re-sold to any entity other than the City of Watertown, unless the City Council approves the sale. In the event of re-conveyance to the City, the consideration will be \$1.00, and

BE IT FURTHER RESOLVED that the Mayor is hereby authorized, empowered and directed to execute a Quit Claim Deed of said property, in accordance with the above conditions, to David Gallo and Erich Seber, or their designee for receipt of the title authorized hereby, upon receipt of the above-mentioned sum of money in cash only to the City Comptroller.

Seconded by

EXHIBIT A



2007-108
 1"=40'
 5/11/09
 J.G.R.

RESOLUTION

Page 1 of 2

Supporting JCIDA Incentives for the Woolworth
Redevelopment Project

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

Introduced by

WHEREAS the Woolworth Building at 11 Public Square is currently vacant and unproductive, and

WHEREAS the redevelopment of the Woolworth Building is an important component of the City of Watertown’s downtown revitalization efforts, and

WHEREAS a joint venture of David Gallo of Georgica Green Ventures LLC and Erich Seber of White Birch Enterprise LLC is proposing to renovate the Woolworth Building into 11,100 square feet of commercial space on the first floor and 50 units of housing on the upper floors, and

WHEREAS the City Council desires to take actions necessary to assist the proposed project in becoming a reality, and

WHEREAS the developer is applying for incentives through the Jefferson County Industrial Development Agency,

NOW THEREFORE BE IT RESOLVED that the City Council agrees that Jefferson County Industrial Development Agency incentives including sales tax, property tax and mortgage tax exemptions should be provided for the redevelopment of the Woolworth Building, and

BE IT FURTHER RESOLVED that the City Council is willing to accept a reasonable Payment In Lieu Of Taxes (PILOT) agreement for property taxes, and

RESOLUTION

Page 2 of 2

Supporting JCIDA Incentives for the Woolworth
Redevelopment Project

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.
 Total

YEA	NAY

BE IT FURTHER RESOLVED that the Mayor is hereby authorized and directed to send a letter to the Jefferson County Industrial Development Agency stating the City Council's concurrence with the incentives as stated above.

Seconded by

December 12, 2012

To: The Honorable Mayor and City Council

From: Sharon Addison, City Manager

Subject: Support for the Adoption of Flower Memorial Library Sunday Hours

At the November 26, 2012 City Council Work Session, the Council unanimously supported the continuance of Sunday hours. On December 11, the City Manager briefed the Library Board on the City's plan to staff and fund Sunday hours.

The City's Adopted Budget for 2012-2013 did not hold provisions for Sunday hours. However, the pilot was successfully staffed and funded for eight weeks from the Budget's general funds. Staffing consisted of two temporary clerks and the Library Director who volunteered her time during the pilot.

The long-term plan to successfully staff the Library for a 7-day work week will require hiring two part-time library clerks. It is Staff's intent to continue to staff Sunday hours, during the interim, with temporary clerks and a librarian, until such time that the Library Director can determine the level of support required from permanent, part-time clerks. The extension of the temporary positions beyond their initial three month window is subject to approval by the Civil Service Commission.

Please consider the resolution to amend the Budget to re-appropriate approximately \$12,000 from the Library Fund's appropriation to install parking lot steps to fund staff to support Sunday hours. Funding would cover salary for temporary clerks, overtime for librarians and overtime for maintenance support as necessary. The Library Board adopted a resolution at their December 11, 2012 meeting supporting the redirection of funding Sunday hours, forgoing the addition of library steps this FY.

RESOLUTION

Page 1 of 1

Approving Supplemental Appropriation No. 2
For Fiscal Year 2012-13 for Various Accounts

Council Member BURNS, Roxanne M.
Council Member BUTLER, Joseph M. Jr.
Council Member MACALUSO, Teresa R.
Council Member SMITH, Jeffrey M.
Mayor GRAHAM, Jeffrey E.
Total

YEA	NAY

Introduced by

WHEREAS the City Council desires to continue having the library open on Sundays through the end of the fiscal year and,

WHEREAS the Fiscal Year 2012-13 Budget did not include funding to be open these additional hours and,

WHEREAS the Fiscal Year 2012-13 Library Fund included funding in the amount of \$25,000 to install parking lot steps that City Council wishes to delay to fund the costs of being open on Sundays,

NOW THEREFORE BE IT RESOLVED by the City Council of the City of Watertown, New York that the total amount of \$13,750 is hereby transferred and appropriated from and to the following accounts of the listed funds for FY 2012-13:

L 7410.0140	Temporary	\$ 5,500
L.7410.0150	Overtime	5,500
L.7410.0430	Contracted Services	(13,750)
L.7410.0810	NYS Retirement	1,900
L 7410.0830	Social Security	850
Total		<u>\$ -</u>

Seconded by

RESOLUTION: Mr. Caughlin moved that the Board of Trustees of the Roswell P. Flower Memorial Library recommend to the Watertown City Council the reappropriation of funds budgeted for stair installation in the amount of \$25,000.00 be reappropriated to fund the additional hours of operation on Sundays through the end of the current fiscal year ending June 30. Motion seconded by Ms. Dittrich.

Mr. Doheny moved to amend the above resolution to reflect that whoever works Sunday hours to be fairly and properly compensated in some fashion. Motion seconded by Mr. Caughlin. Motion carried.

Res No. 7

December 11, 2012

To: The Honorable Mayor and City Council
From: Elliott B. Nelson, Confidential Assistant to the City Manager
Subject: Fairfield Inn Waterline and Utility Easements

Attached for Council's consideration are two easements for a waterline and a storm sewer located at the Fairfield Inn in near Gaffney Drive. In his attached report, City Engineer Hauk explains that City Council gave its assent at the regular meeting on September 6, 2011, and at that time instructed staff to present the easements upon the completion of construction. City Council members will find all the background material related to these easement contained within.

City staff will be available to answer any questions regarding this legislation.

RESOLUTION

Accepting Waterline Easement and Utility Easement Between the City Of Watertown and Thousand Islands Hospitality, LLC

Page 1 of 2

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

Introduced by

WHEREAS Thousand Islands Hospitality LLC (the “Grantor”) is the record owner of real property located in the City of Watertown near the intersection of Commerce Park Drive and Gaffney Drive Extension and known as tax parcel #8-40-109 (the “Property”), and

WHEREAS the Grantor received site plan approval for development of the Property including waterline/water system and storm water/storm sewer system improvements (the “Improvements”) to be constructed to the reasonable requirements of the City and conveyed to the City as a condition of site plan approval, and

WHEREAS the Grantor has constructed/preformed such Improvements on the Property to the reasonable satisfaction of the City and is now prepared to convey such Improvements with easements to the City, and

WHEREAS the City Council of the City of Watertown deems it appropriate and in the best interest of the citizens of the City of Watertown to accept the Waterline Easement, as specifically described in Exhibit A, and

WHEREAS the City Council of the City of Watertown deems it appropriate and in the best interest of the citizens of the City of Watertown to accept the Utility Easement, as specifically described in Exhibit B, and

WHEREAS the City Council of the City of Watertown deems it appropriate and in the best interest of the citizens of the City of Watertown to accept the infrastructure contained within the Waterline Easement and Utility Easement as specifically described in a Bill of Sale attached as Exhibit C,

NOW THEREFORE BE IT RESOLVED that the City Council of the City of Watertown hereby accepts the Waterline Easement as described in Exhibit A, as attached hereto, and the Utility Easement as described in Exhibit B, as attached hereto, and the infrastructure as

RESOLUTION

Accepting Waterline Easement and Utility Easement Between the City Of Watertown and Thousand Islands Hospitality, LLC

Page 2 of 2

described in Exhibit C, as attached hereto, and

- Council Member BURNS, Roxanne M.
- Council Member BUTLER, Joseph M. Jr.
- Council Member MACALUSO, Teresa R.
- Council Member SMITH, Jeffrey M.
- Mayor GRAHAM, Jeffrey E.

Total

YEA	NAY

BE IT FURTHER RESOLVED that Sharon Addison, City Manager, is authorized and directed to take all steps necessary to effect the conveyance of said Waterline Easement, Utility Easement, and Improvements to the City of Watertown, and

BE IT FURTHER RESOLVED that this resolution shall take effect immediately.

Seconded by



WATERLINE EASEMENT

THIS INDENTURE, made the 4 day of December 2012, between **THOUSAND ISLANDS HOSPITALITY LLC**, 2815 Monroe Avenue, Rochester, New York 14618, party of the first part, hereinafter designated as the GRANTOR, and the **CITY OF WATERTOWN**, a municipal corporation of the State of New York, having an address of City Hall, 245 Washington Street, Watertown, New York, party of the second part, hereinafter designated as the GRANTEE:

WITNESSETH, that the Grantor, in consideration of ONE DOLLAR (\$1.00) lawful money of the United States, the receipt of which is hereby acknowledged, and other good and valuable consideration, paid by the Grantee, does hereby grant and release unto the grantee, its successors and assigns, forever, a Permanent and Perpetual Easement to be exercised in, on, over, under, through, and across the hereinafter described property for the purpose of constructing, laying, installing, replacing, relocating, operating, maintaining, cleaning, repairing, and removing a water line or lines, and appurtenances of whatever type or material, including, but not limited to, hydrants, so as to enable the transmission of water through any line now on, under, or through, said property or any line to be hereinafter placed upon, under, or through said property, as the grantee may now or shall from time to time hereinafter deem necessary for the transmission of water, which said property is described on **SCHEDULE A** attached hereto.

During and for the purpose of the construction of the water pipeline, lateral pipeline or appurtenances, the Grantee shall have the right to clear and use additional land as a temporary easement (the "Temporary Easement"). The said Temporary Easement shall be a maximum of 10' in width on both sides of the permanent easement described in **SCHEDULE A**. The grant of the Temporary Easement shall terminate upon completion of construction of the facilities and surface restoration.

The Grantee or its duly authorized representative or representatives shall also have the right at any time to extend lateral pipelines and appurtenances to all buildings now or hereafter constructed upon lots abutting said Easement strip.

The Grantee or its duly authorized representative or representatives shall have the right at any time to cut roots or remove trees and vegetation or other obstructions on or adjacent to said above described premises which in the opinion of the Grantee may be likely to interfere with or prevent the free and unrestricted use and exercise of the Permanent Easement and the rights hereinabove described.

The Grantee shall, after the completion of initial construction or any other work required to be done in connection with the granting of this Easement, restore the surface of the surrounding ground to substantially its former condition except for such trees or shrubs which have been cut or removed in connection With the work of installing the water pipeline and appurtenances.

Reserving, however, to the Grantor of the above described property and its successors in interest, the right and privilege of using such property, except for the erection of buildings or other structures over said line, provided the exercise of such right and privilege does not interfere or is not likely to interfere with or prevent the free and unrestricted use and exercise of the Permanent Easement and rights hereinabove described.

The Grantee or its duly authorized representative or representatives shall have the right at any time of ingress or egress, and regress, over and upon the premises of the Grantor, its successors and/or assigns into and from the aforesaid premises for the purposes hereinbefore or hereinafter set forth with vehicles or machinery of any kind or on foot.

TO HAVE AND TO HOLD the rights hereby granted unto the Grantee, its successors, and assigns forever; and the said Grantor hereby covenants as follows:

FIRST: That the grantee shall quietly enjoy the rights hereby granted.

SECOND: That the Grantor, its successor and/or assigns will forever WARRANT the title to the rights hereby granted.

IN WITNESS WHEREOF, the Grantor has hereunto caused these premises to be signed the day and year first above written.

THOUSAND ISLANDS HOSPITALITY LLC

By: 

, **Managing Member**

STATE OF NEW YORK)

COUNTY OF New York) SS:

On 4th of December, 2012, before me, the undersigned, a notary public in and for said State, personally appeared Diyesh Kaladia personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s) or the person on behalf of which the individual(s) acted, executed the instrument.



NOTARY PUBLIC

CRYSEL PATON
NOTARY PUBLIC-STATE OF NEW YORK
No. 01PA6263184
~~Qualified in~~ Richmond County
My Commission Expires June 04, 2016



C.N.Y. LAND SURVEYING LLC

DOUGLAS J. REITH, L.S.

N.Y.S. LICENSE 049904

**PROPOSED WATERLINE EASEMENT
PART OF GREAT LOT 2
CITY OF WATERTOWN**

ALL THAT TRACT OR PARCEL OF LAND, situate in the City of Watertown, County of Jefferson, State of New York and being part of Great Lot 2 in said City and being more particularly described as follows:

BEGINNING at a point in the northerly line of Commerce Park Drive, said point being S.86°09'12"E., 332.19 feet from the intersection of the northerly line of said Commerce Park Drive with the easterly line of Gaffney Drive Extension and the southwesterly corner of Lot 2 of Jefferson Hostels, Inc. Subdivision as filed in the Jefferson County Clerk's Office on September 1, 2009, map #4836;

- thence** N.05°01'47"E., a distance of 178.94 feet to a point for corner;
- thence** N.84°58'13"W., a distance of 62.71 feet to a point for corner;
- thence** N.05°01'47"E., a distance of 30.00 feet to a point for corner;
- thence** S.84°58'13"E., a distance of 62.71 feet to a point for corner;
- thence** N.05°01'47"E., a distance of 89.27 feet to a point for corner;
- thence** N.20°10'38"E., a distance of 6.69 feet to a point for corner;
- thence** N.67°44'05"W., a distance of 196.90 feet to a point for corner ;
- thence** N.21°08'37"E., a distance of 30.00 feet to a point for corner;
- thence** S.67°44'05"E., a distance of 196.40 feet to a point for corner;
- thence** N.20°10'38"E., a distance of 30.29 feet to a point for corner;
- thence** N69°49'22"W., a distance of 35.54 feet to a point for corner;
- thence** N.20°10'38"E., a distance of 30.00 feet to a point for corner;
- thence** S.69°49'22"E., a distance of 40.54 feet to a point for corner;



**PROPOSED WATERLINE EASEMENT
PART OF GREAT LOT 2
CITY OF WATERTOWN
PAGE 2 OF 2**

thence N.20°10'38"E., a distance of 10.47 feet to a point for corner;

thence S.73°03'34"E., a distance of 17.75 feet to a point for corner;

thence S.16°56'26"W., a distance of 6.00 feet to a point for corner;

thence S.73°03'34"E., a distance of 152.83 feet to a point for corner;

thence S.52°51'06"E., a distance of 35.24 feet to a point for corner;

thence N.37°08'54"E., a distance of 25.00 feet to a point for corner;

thence N.52°51'06"W., a distance of 30.79 feet to a point for corner;

thence N.73°03'34"W., a distance of 142.84 feet to a point for corner;

thence S.20°10'38"W., a distance of 73.84 feet to a point for corner;

thence S.05°01'47"W., a distance of 129.10 feet to a point for corner;

thence S.84°58'13"E., a distance of 15.00 feet to a point for corner;

thence S.05°01'47"W., a distance of 30.00 feet to a point for corner;

thence N.84°58'13"W., a distance of 15.00 feet to a point for corner;

thence S.05°01'47"W., a distance of 134.51 feet to a point for corner in the northerly line of said Commerce Park Drive;

thence N.86°09'12"W., along the northerly line of said Commerce Park Drive, a distance of 30.01 feet to the **POINT OF BEGINNING**. CONTAINING 0.595 Acre of land more or less.

The hereinbefore described parcel of land is subject to any and all easements and/or rights of way of record.

UTILITY EASEMENT

THIS INDENTURE, made the 4 day of December, 2012, between **THOUSAND ISLANDS HOSPITALITY LLC**, 2815 Monroe Avenue, Rochester, New York 14618, party of the first part, hereinafter designated as the GRANTOR, and the **CITY OF WATERTOWN**, a municipal corporation of the State of New York, having an address of City Hall, 245 Washington Street, Watertown, New York, party of the second part, hereinafter designated as the GRANTEE:

WITNESSETH, that the Grantor, in consideration of ONE DOLLAR (\$1.00) lawful money of the United States, the receipt of which is hereby acknowledged, and other good and valuable consideration, paid by the Grantee, does hereby grant and release unto the grantee, its successors and assigns, forever, a Permanent and Perpetual Easement to be exercised in, on, over, under, through, and across the hereinafter described property for the purpose of constructing, laying, installing, replacing, relocating, operating, maintaining, cleaning, repairing, and removing water or drainage lines, and appurtenances of whatever type or material, including, but not limited to, hydrants, so as to enable the transmission of water and storm water through any line now on, under, or through, said property or any line to be hereinafter placed upon, under, or through said property, as the grantee may now or shall from time to time hereinafter deem necessary for the transmission of water and storm water, which said property is described on **SCHEDULE A Proposed Utility Easement** attached hereto.

During and for the purpose of the construction/installation of utilities along Gaffney Road, the Grantee shall have the right to clear and use additional land as a temporary easement (the "Temporary Easement"). The said Temporary Easement shall be a maximum of 10' in width on both sides of the permanent easement described in **SCHEDULE A**. The grant of the Temporary Easement shall terminate upon completion of construction of the facilities and surface restoration.

The Grantee or its duly authorized representative or representatives shall also have the right at any time to extend lateral pipelines and appurtenances to all buildings now or hereafter constructed upon lots abutting said Easement strip.

The Grantee or its duly authorized representative or representatives shall have the right at any time to cut roots or remove trees and vegetation or other obstructions on or adjacent to said above described premises which in the opinion of the Grantee may be likely to interfere with or prevent the free and unrestricted use and exercise of the Permanent Easement and the rights hereinabove described.

The Grantee shall, after the completion of initial construction or any other work required to be done in connection with the granting of this Easement, restore the surface of the surrounding ground to substantially its former condition except for such trees or shrubs which have been cut or removed in connection With the work of installing the water pipeline and appurtenances.

Reserving, however, to the Grantor of the above described property and its successors in interest, the right and privilege of using such property, except for the erection of buildings or other



C.N.Y. LAND SURVEYING LLC

DOUGLAS J. REITH, L.S.

N.Y.S. LICENSE 049904

SCHEDULE A

**PROPOSED UTILITY EASEMENT
PART OF GREAT LOT 2
CITY OF WATERTOWN**

ALL THAT TRACT OR PARCEL OF LAND, situate in the City of Watertown, County of Jefferson and State of New York and being part of Great Lot 2 in said City and being more particularly described as follows:

BEGINNING at the intersection of the easterly line of Gaffney Drive Extension with the northerly line of Commerce Park Drive, said point being the southwesterly corner of Lot 2, of Jefferson Hostels, Inc. Subdivision as filed in the Jefferson County Clerk's Office on September 1, 2009, Map #4836;

thence N.22°15'55"E., along the easterly line of said Gaffney Drive Extension, a distance of 497.09 feet to a point for corner;

thence S.67°41'47"E., a distance of 27.70 feet to a point for corner;

thence S.21°08'37"W., a distance of 441.66 feet to a point for corner;

thence S.32°40'37"E., a distance of 27.26 feet to a point for corner;

thence S.03°50'48"E., a distance of 19.26 feet to a point in the northerly line of said Commerce Park Drive;

thence N86°09'12"W., along the northerly line of said Commerce Park Drive, a distance of 68.24 feet to the **POINT OF BEGINNING**. **CONTAINING** 0.384 Acre of land more or less.

The herein before described parcel of land is subject to any and all easements and/or rights of way of record.

**11.134 UTILITY
January 06, 2012**

EXHIBIT C

BILL OF SALE

FOR AND IN CONSIDERATION OF One Dollar (\$1.00) and the mutual promises and agreements set forth herein, **THOUSAND ISLANDS HOSPITALITY LLC**, 2815 Monroe Avenue, Rochester, New York 14618, party of the first part, for itself, its successors and assigns, hereby sells, assigns, grants, and quitclaims to the **CITY OF WATERTOWN**, a municipal corporation of the State of New York, having an address of City Hall, 245 Washington Street, Watertown, New York, party of the second part, the following:

ANY AND ALL underground water lines, utility lines and appurtenances of whatever type or material, including, but not limited to, hydrants, but excepting any and all laterals, existing within the easement areas described in the following easements: from **THOUSAND ISLANDS HOSPITALITY LLC** to the **CITY OF WATERTOWN** dated _____, 2012 and recorded in the Jefferson County Clerk's office on _____, 2012 at file number _____; easement from **THOUSAND ISLANDS HOSPITALITY LLC** to the **CITY OF WATERTOWN** dated _____, 2012 and recorded in the Jefferson County Clerk's office on _____, 2012 at file number _____

Upon execution of this Bill of Sale, any and all rights, title, or interest in the described waterline, utility line and appurtenances shall be the sole and exclusive property of the **CITY OF WATERTOWN**. From this date forward, the **CITY OF WATERTOWN** shall have sole responsibility for repairs and maintenance to the described waterline, utility lines and appurtenances.

THOUSAND ISLANDS HOSPITALITY LLC

By: _____

Managing Member

CITY OF WATERTOWN

By: _____

STATE OF NEW YORK)
COUNTY OF) SS:

On 4th day of December, 2012, before me, the undersigned, a notary public in and for said State, personally appeared Dnyesh Mahadia personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s) or the person on behalf of which the individual(s) acted, executed the instrument.

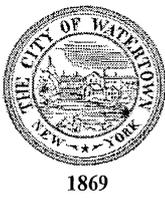
Crysel Paton
NOTARY PUBLIC

CRYSEL PATON
NOTARY PUBLIC-STATE OF NEW YORK
No. 01PA6263184
Qualified in Richmond County
My Commission Expires June 04, 2016

STATE OF NEW YORK)
COUNTY OF) SS:

On _____, 2012, before me, the undersigned, a notary public in and for said State, personally appeared _____ personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s) or the person on behalf of which the individual(s) acted, executed the instrument.

NOTARY PUBLIC



CITY OF WATERTOWN
ENGINEERING DEPARTMENT
MEMORANDUM

DATE: 10 December 2012

TO: Sharon Addison, City Manager

FROM: Kurt Hauk, City Engineer *KH*

SUBJECT: Fairfield Inn- Acceptance of Utility Easements

Enclosed are two signed easements for the Fairfield Inn, a water easement and a utility easement for storm water. These easements are part of the approved site plan and require acceptance by City Council.

The enclosed memorandum and documents explain the need for the easements. These easements will be filed with the County Clerk's Office upon acceptance by the City Council.

Please prepare a resolution for Council consideration.

Cc Mike Sligar, Superintendent of Water



CITY OF WATERTOWN
ENGINEERING DEPARTMENT
MEMORANDUM

DATE: 7 December 2012

TO: Kurt Hauk, City Engineer

FROM: Justin Wood, Civil Engineer II

SUBJECT: Utility Easement Acceptance – Fairfield Inn

On October 19, 2009 the Watertown City Council voted to approve the Site Plan Application for two hotels and a restaurant at 250 Commerce Park Drive (formerly VL-2 Gaffney Drive), Parcel Number 8-40-109.000. At the time of approval, the site plan drawings depicted a private water supply system to feed the three buildings.

In 2010, the developer told the City they would likely subdivide the property so that each building was on a separate parcel. At that time, the developer was told if the property was subdivided, an 8 inch looped water system would have to be constructed and turned over to the City with appropriate easements. A portion of the looped water system parallels Gaffney Drive before heading east along the main driveway into the site, and then heading back south to Commerce Park Drive. At its September 6, 2011 meeting, City Council concurred to have the appropriate resolution drawn up when construction of the water system was complete. The developer also agreed to transfer ownership and easements to the City upon completion.

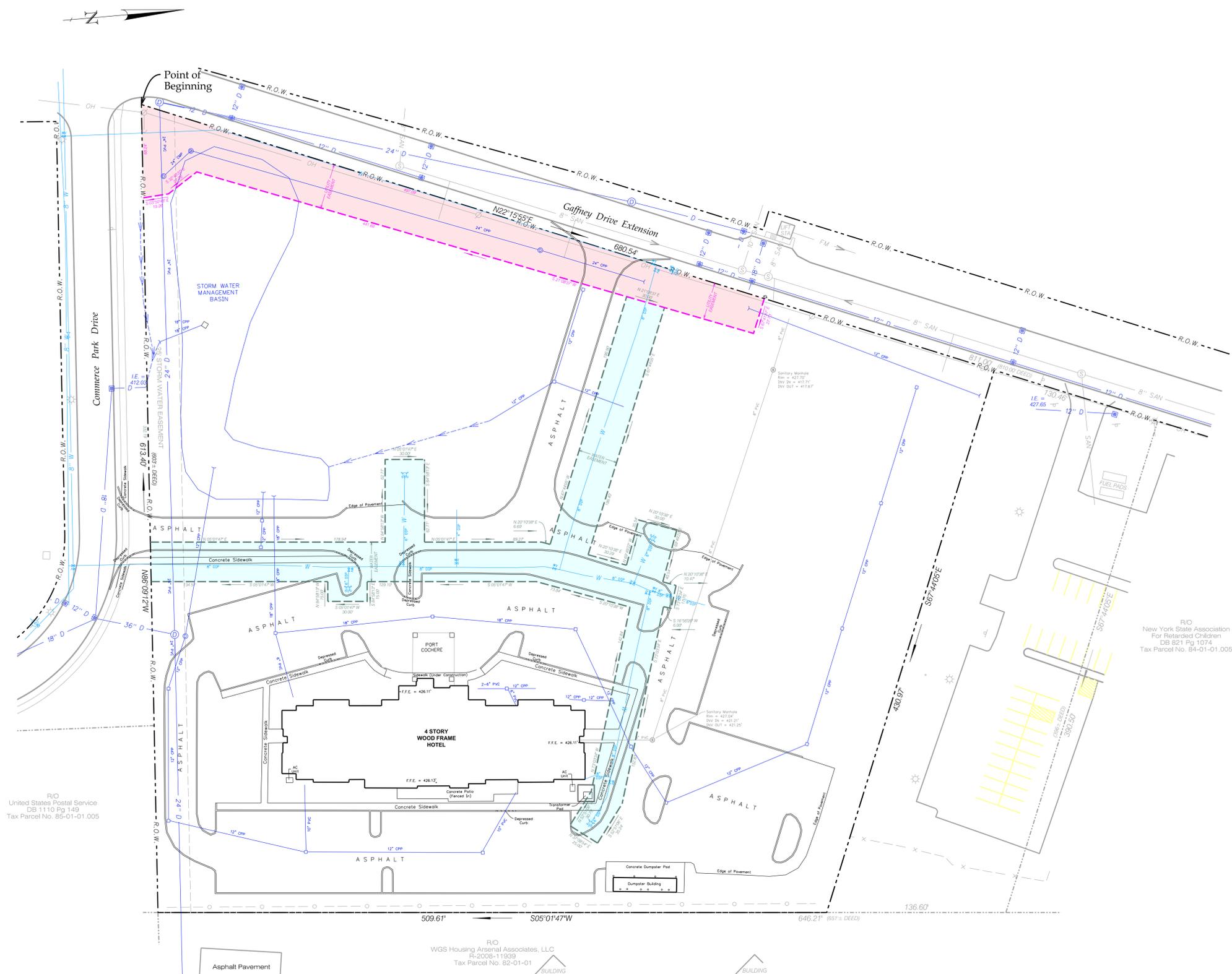
In addition to the water system, the approved site plan called for replacing an existing drainage swale with a closed pipe storm sewer to pick up stormwater flows. The drainage swale conveyed stormwater flows from Faichney Drive and Gaffney Drive through the hotel parcel, to a storm sewer pipe adjacent to Commerce Park Drive. The drainage swale was replaced with a new 24 inch storm sewer, which parallels Gaffney Drive, and ties into an existing 30 inch storm sewer, owned by the City, along Commerce Park Drive. This new 24 inch storm sewer is critical in draining City right of way and should therefore also be conveyed to and accepted by the City.

The storm sewer was constructed in 2010, and the water system was constructed in 2011. The developer is presently working to resolve the remaining conditions of their site plan approval, one of them being the transfer of utility easements to the City. A Water Line Easement and a Utility Easement, along with a Bill of Sale, have been drawn up and signed by the developer, for approval by City Council.

Key

- Property Line
- - - R.O.W. - - - Right of Way
- Lot Line
- R/O Reputed Owner
- OH Overhead Utility
- ⊙ Power Pole
- 8" SAN 8" Sanitary Sewer w/ Size
- ⊙ Sanitary Manhole
- G Gas Main
- 12" D 12" Drainage Pipe w/ Size
- Drainage Manhole / Catch Basin
- 6" W 6" Water Main w/ Size
- ⊙ Hydrant

Property Information
 Zoned: Commercial
 Current Land Use: Vacant
 Tax Map # 8-40-101.007
 Address: VL-2 Gaffney Drive

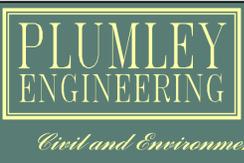
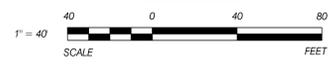


R/O
 New York State Association
 For Retarded Children
 DB 821 Pg 1074
 Tax Parcel No. 84-01-01.005

R/O
 United States Postal Service
 DB 1110 Pg 149
 Tax Parcel No. 65-01-01.005

R/O
 WGS Housing Arsenal Associates, LLC
 R-2008-11939
 Tax Parcel No. 62-01-01

Plan View



PLUMLEY ENGINEERING, P.C.
 8232 LOOP ROAD
 BALDWINVILLE, NY 13027
 TELEPHONE: (315) 638-8587
 FAX: (315) 638-9740
 WWW.PLUMLEYENG.COM

REVISIONS:	DATE:	BY:

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PROJECT: **GAFFNEY DRIVE HOTELS**
 CLIENT: **THOUSAND ISLAND HOSPITALITY, LLC**
 LOCATION: **CITY OF WATERTOWN, JEFFERSON COUNTY, NEW YORK**

THOUSAND ISLAND HOSPITALITY, LLC
 299 Broadway - Suite 1215
 New York, New York 10007
 Phone: 646-344-1097

DWG. TITLE: **EASEMENT PLAN**

Note: No alteration permitted hereon except as provided under Section 7209 Subdivision 2 of the New York State Education Law.

PROJECT No.: 2011098
 FILE NAME: EP01P
 SCALE: 1" = 40'
 DATE: DECEMBER 2012
 ENGD BY: JFC
 DRAWN BY: JMD
 CHECKED BY: JFC

SHEET NO.: **EP 1 OF 1**
 © Plumley Engineering, P.C. 2010

December 13, 2012

To: The Honorable Mayor and City Council

From: James E. Mills, City Comptroller .

Subject: Proposed County Tax Rate for 2013

By resolution adopted December 11, 2012, the Jefferson County Board of Legislators apportioned the share of the 2013 County tax to be levied on the real property within the City. The City's share of the 2013 County tax is \$7,412,123. A comparison of the amount required for County tax purposes for the years 2009 through 2013 is shown below:

	City Share of County Tax			Tax Rate		
	Levy	Amount	Percentage	Per \$1,000	Amount	Percentage
2013	\$ 7,412,123	\$ 603,170	8.86%	7.215725	\$ 0.51	7.66%
2012	\$ 6,808,953	\$ 66,614	0.99%	\$6.702289	\$(0.00)	-0.04%
2011	\$ 6,742,339	(302,320)	-4.43%	\$6.704962	\$(0.34)	-4.86%
2010	\$ 7,044,659	\$ 220,507	3.23%	\$7.047448	\$ 0.32	4.70%
2009	\$ 6,824,152	\$ 40,257	0.59%	\$6.730845	\$(0.26)	-3.67%

The 2013 County tax rate calculates to \$7.215725 per \$1,000 of assessed valuation which represents a 7.66% increase compared to the 2012 County tax rate of \$6.702289. The 2012 County taxable assessed values total \$1,024,124,593 compared to \$1,013,572,185 from the 2011 assessment roll. A resolution has been prepared for City Council consideration to approve the 2013 County tax rate.

Pursuant to New York State Environmental Conservation Law Section 15-2123 subdivision 6, the County has also directed the City to levy and collect the unpaid Hudson River Black River Regulating District 2011 Annual Assessment for parcel 01-14-121.00 (591 Rear West Main Street) owned by Watertown River Properties in the amount of \$3,771.34. This amount will become part of the parcel's 2013 County tax bill similar to a re-levied water bill on a City tax bill.

RESOLUTION

Page 1 of 1

Establishing 2013 County Tax Rate

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.
 Total

YEA	NAY

Introduced by

WHEREAS the Board of Legislators of the County of Jefferson, by resolution dated December 11, 2012, and in accordance with New York State Real Property Tax Law Article 9 Section 904 has certified to the City that the contribution of the City of Watertown to the taxes of the County of Jefferson for the Fiscal Year beginning January 1, 2013 is \$7,412,123.07, and

WHEREAS the Board of Legislators of the County of Jefferson, by resolution dated November 14, 2012, and in accordance with New York State Environmental Conservation Law Section 15-2123 subdivision 6, has directed the City to levy and collect the unpaid Hudson River Black River Regulating District 2012 Annual Assessment for parcel 01-14-121.00 owned by Watertown River Properties in the amount of \$3,771.34,

NOW THEREFORE BE IT RESOLVED that this Council shall and hereby does levy the said unpaid Hudson River Black River Regulating District 2011 Annual Assessment for parcel 01-14-121.00 owned by Watertown River Properties in the amount of \$3,771.34, so ascertained and directed and to be certified to the City and to be extended on the Assessment Rolls by the City Assessor, as provided by Section 115 of the City Charter, and

NOW THEREFORE BE IT RESOLVED that this Council shall and hereby does levy the said aggregate amount of taxes of \$7,412,123.07 and unpaid Hudson River Black River Regulating District 2012 Annual Assessment for parcel 01-14-121.00 owned by Watertown River Properties in the amount of \$3,771.34, so ascertained and directed and to be certified to the City and to be extended on the Assessment Rolls by the City Assessor, as provided by Section 115 of the City Charter, and

BE IT FURTHER RESOLVED that the City does hereby levy a total fee of \$7,415,894.41 to be collected at a rate of \$7.215725 per \$1,000 of assessed valuation, of which County tax levy is \$7,389,801.31 and includes \$22,321.96 in omitted taxes.

Seconded by

Ord No. 1

December 12, 2012

To: The Honorable Mayor and City Council
From: Kenneth A. Mix, Planning and Community Development Coordinators
Subject: Amending Code of the City of Watertown, §310-34, Accessory Uses in Residence Districts

Council Member Jeffrey Smith requested that the attached ordinance be drafted.

§310-34.B.(7) of the Zoning Ordinance allows “the taking of not more than four non-transient roomers, provided that no sign is displayed” as an accessory use in Residence Districts. This ordinance deletes that sentence.

The ordinance will only affect Residence A Districts because boarding, lodging, rooming and tourist houses are allowed as principal uses in Residence B and C Districts. Even there it may not have a practical effect. Residence A Districts allow one-family dwellings. The zoning ordinance defines a family as: “any number of individuals living together as a single housekeeping unit. To distinguish a “family” from a club, fraternity or boardinghouse, not more than four members of a family shall be other than blood relatives.” The Code Enforcement Bureau’s ability to determine whether there are more than four non-related persons in a household is very limited.

As with all zoning amendments, this ordinance will have to be sent to the City and County Planning Boards for recommendations, a public hearing must be held, and a SEQRA determination must be made by the City Council.

ORDINANCE

Amending the Code of the City of Watertown,
§310-34, Accessory Uses in Residence Districts

Page 1 of 1

Council Member BURNS, Roxanne M.
 Council Member BUTLER, Joseph M. Jr.
 Council Member MACALUSO, Teresa R.
 Council Member SMITH, Jeffrey M.
 Mayor GRAHAM, Jeffrey E.

YEA	NAY

Total

Introduced by

WHEREAS it has been proposed to amend the Code of the City of Watertown, New York, so that the taking of not more than four non-transient roomers is no longer listed as an allowed accessory use in Residential Districts, and

WHEREAS the City Planning Board reviewed the proposed amendment to §310-34 of the Code of the City of Watertown at its January 8, 2013 meeting and made its recommendation on adoption, and

WHEREAS the Jefferson County Planning Board reviewed the proposed amendment pursuant to General Municipal Law Section 239-m, and

WHEREAS a Public Hearing was held on the proposed Zoning Ordinance Amendment on February 4, 2013 after due Public Notice, and

WHEREAS the City Council has determined, pursuant to the State Environmental Quality Review Act that there will not be any significant environmental impacts caused by the adoption of this Ordinance, and

WHEREAS the City Council of the City of Watertown believes that it is in the best interest of the residents of the City of Watertown to make the following change to Chapter 310 of the City Code,

NOW THEREFORE BE IT ORDAINED by the City Council of the City of Watertown, New York, that §310-34.B.(7) that reads “the taking of not more than four non-transient roomers, provided that no sign is displayed” is hereby deleted from the Code of the City of Watertown, and

BE IT FURTHER ORDAINED that this Amendment to the City Code shall take effect as soon as published once in the official newspaper of the City of Watertown, New York, or printed as the City Manager directs.

Seconded by

December 13, 2012

To: The Honorable Mayor and City Council
From: James E. Mills, City Comptroller
Subject: Property Auction

Attached is the property auction notice for the upcoming January 8th auction of 753 Rear Main Street West and 729 Morrison Street. The terms of this and future auctions have been expanded to include a clause which asserts the sale of a property shall not be contingent upon other actions such as zoning applications.

The term stating that the property transfer is to occur within 30 days of City Council approval was not modified as this has not been an issue over the years.



**CITY OF WATERTOWN, NEW YORK
OFFICE OF THE CITY COMPTROLLER**

SUITE 203, CITY HALL
245 WASHINGTON STREET
WATERTOWN, NEW YORK 13601
Tel: (315) 785-7754
FAX: (315) 785-7826
E-Mail: jmills@watertown-ny.gov

PUBLIC AUCTION NOTICE

The following parcels will be sold at public auction on **Tuesday, January 8, 2013, at 6:00 p.m.** (registration starts at 5:30 p.m.) in the 3rd Floor City Council Chambers, City Hall, 245 Washington St. The City reserves the right to withdraw any parcel from the list prior to the auction.

NON-VACANT LOT PROPERTIES

<u>Parcel Number</u>	<u>Location</u>	<u>Assessment</u>	<u>Lot size</u>	<u>Zoning</u>	<u>Minimum Bid</u>
01-14-201.000	753 Rear Main St. West	\$ 205,700	1.10 acres	Heavy Industry	\$20,000

OPEN INSPECTION OF PROPERTY:

Thursday, January 3, 2013: - 1:00 p.m. – 3:00 p.m.
Friday, January 4, 2013: - 9:00 a.m. – 11:00 a.m.

VACANT LOTS

<u>Parcel Number</u>	<u>Location</u>	<u>Assessment</u>	<u>Lot size</u>	<u>Zoning</u>	<u>Minimum Bid</u>
01-03-105.000	729 Morrison Street	\$ 10,000	66' x 100'	Neighborhood Business	\$1,000

TERMS OF AUCTION:

1. Each parcel will be sold individually “as is” and the sale shall not be contingent upon other actions such as zoning applications.
2. The successful bidder will be required to sign a purchase offer and disclaimer as well as make a non-refundable 10% bid deposit prior to leaving the auction.
3. All bids are subject to the final approval of the City Council. It is anticipated that City Council will authorize or reject the bids on each parcel at the meeting to be held on Monday, January 21, 2013. The City Comptroller’s office will notify you of their decision.
4. Transfer of the property is to occur within thirty (30) days after acceptance by the City Council.
5. The buyer will receive a quit claim deed, with no abstract of title. The quit claim deed will contain a provision that the property must be brought into compliance with all applicable provisions of the Uniform Construction Codes, as defined by Watertown City Code Chapter 120, and the Code of the City of Watertown within one (1) year from the date of delivery of this deed, the party of the first part shall have the right to seek, and be entitled to receive, reversion of title to the premises herein unto itself upon written demand made to the party of the second part. Any right-of-ways and easements on the parcels will remain.
6. The City will be recording the deeds with the Jefferson County Clerk’s office. The appropriate filing fees will be included in the closing costs.
7. Where applicable, the buyer of the property will be charged the pro-rated shares of any current city, school and county property taxes. If the parcel is currently exempt from property taxes then the new property owner will be charged omitted taxes calculated from the closing date on the subsequent tax bills.
8. The minimum price for each parcel has been established by City Council.
9. The sale of the parcels is subject to any and all liens that may exist. However, the sale of the properties by the City will extinguish the City’s tax lien.



Property Description Report For: 753 Rear Main St W, Municipality of City of Watertown



Status:	Re-Activated
Roll Section:	Wholly Exem
Swis:	221800
Tax Map ID #:	1-14-201.000
Account #:	13070820
Property Class:	710 - Manufacture
Site:	COM 1
In Ag. District:	No
Site Property Class:	710 - Manufacture
Zoning Code:	HI - Heavy Industry
Neighborhood Code:	00608
School District:	Watertown
Total Assessment:	2012 - \$205,700 2011 - \$205,700
Total Acreage/Size:	1.10
Land Assessment:	2012 - \$32,000 2011 - \$32,000
Full Market Value:	2012 - \$231,124 2011 - \$216,526
Equalization Rate:	----
Deed Book:	2012
Grid East:	994968
Legal Property Desc:	1.10 acres 114201
Deed Page:	10098
Grid North:	1452447

Buildings

AC%	Sprinkler%	Alarm%	Elevators	Basement Type	Year Built	Condition	Quality	Gross Floor Area (sqft)	Stories
0	0	0	0	0	1950	Fair	Average	26281	2.00



Property Description Report For: 729 Morrison St, Municipality of City of Watertown



Status:	Active
Roll Section:	Wholly Exem
Swis:	221800
Tax Map ID #:	1-03-105.000
Account #:	13082470
Property Class:	312 - Vac w/imprv
Site:	RES 1
In Ag. District:	No
Site Property Class:	312 - Vac w/imprv
Zoning Code:	NB - Nbhd Business
Neighborhood Code:	00608
School District:	Watertown
Total Assessment:	2012 - \$10,000 2011 - \$10,000
Total Acreage/Size:	0.15
Land Assessment:	2012 - \$7,600 2011 - \$7,600
Full Market Value:	2012 - \$11,236 2011 - \$10,526
Equalization Rate:	----
Deed Book:	2012
Grid East:	996239
Legal Property Desc:	66x100 103105
Deed Page:	10097
Grid North:	1453511

December 12, 2012

To: The Honorable Mayor and City Council
From: Kenneth A. Mix, Planning and Community Development Coordinator
Subject: Jefferson County Comprehensive Economic Development Strategy

A copy of the 2012 Jefferson County Comprehensive Economic Development Strategy (CEDS) is included with each Council Member's agenda package. It consists of two documents: the main report and a supplemental report.

The strategy is updated every five years or so. As in the past, the CEDS Committee is requesting that municipalities and organizations within the county endorse the plan. The City Council has endorsed past strategies.

Please read the documents and in mid-January, we will ask the City Council whether you wish to endorse the plan.



Jefferson County, New York
Comprehensive Economic Development Strategy (CEDS)
2012

**A “BLUEPRINT” FOR
ECONOMIC DEVELOPMENT
ACTION**

Prepared by the Jefferson County CEDS Committee in
Partnership with Camoin Associates, Inc.

Jefferson County Comprehensive Economic Development Strategy 2012

Prepared For:

Jefferson County Planning
175 Arsenal Street
Watertown, NY 13601
www.co.jefferson.ny.us

**Jefferson County Industrial
Development Agency**
800 Starbuck Avenue
Watertown, NY 13601
www.jcida.com

**Economic Development
Consultant:**

Camoin Associates, Inc.
120 West Avenue, Suite 303
Saratoga Springs, NY 12866
518.899.2608
www.camoinassociates.com

Acknowledgements:

The development of this document involved numerous members of the Jefferson County community. Below is a list of the people and organizations that made this analysis possible.

CEDS Members:

Jeff Wood, Samaritan Medical Center - Chair
Jill Pippin, Jefferson Community College - Vice Chair
Bruce Armstrong, Retired County Government - Secretary

Dennis Affinati
Donald Alexander
George Anderson
Lorraine Clement
Eric Constance
Gary DeYoung
Jay Matteson
Cheryl Mayforth
Carl McLaughlin
Ken Mix
John Peck
Lynn Pietroski
John VanDeLoo
Peter Whitmore
James Wright
Dave Zembiec

Int'l Brotherhood of Electrical Workers
Jefferson County IDA
Current Applications, Inc
Jefferson Physicians Organization
Small Business Development Center
Thousand Islands International Council
Jefferson County IDA
Jefferson County WorkPlace
Fort Drum Regional Liaison Organization
City of Watertown
Jefferson County Board of Legislators
Greater Watertown Chamber of Commerce
Empire State Development
Entrepreneur
Development Authority of the North Country
Jefferson County IDA

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I. EXECUTIVE SUMMARY

Introduction

The U.S. Economic Development Administration (“EDA”) recommends major updates to Comprehensive Economic Development Strategy (“CEDS”) plans every five years. Jefferson County’s last major CEDS update was in 2006 and the County received an EDA planning grant, matched with local resources, to complete a 2012 update to its CEDS plan. The County engaged Camoin Associates, an economic development consulting firm with CEDS experience, to lead the update effort.

Through this update, the Jefferson County CEDS Committee (“CEDS Committee”) has revised its baseline CEDS document to analyze changes in local economic conditions and identify emerging trends and new opportunities for improving the health of the County’s economy and employment base. The CEDS planning process attempts to reflect all major economic sectors in the County, such as Fort Drum, tourism, service businesses, manufacturing, and agriculture. The CEDS plan is intended to be used at varying levels to help direct integrated economic development programming and leverage funding for local economic and community development initiatives.

The following report includes a summary of all background research that was conducted as well as an Action Plan that describes the implementation of the CEDS in detail, including specific goals and action items. As such, the Action Plan is a blueprint for County-wide economic development efforts for the years to come. The CEDS Committee will continue to make periodic updates to the plan to anticipate changes in the economic climate.

Work Performed

In order to develop a well rounded and comprehensive economic development strategy for the County, it was necessary to conduct significant background research. The first step was to review existing research and planning documents as they relate to the County’s ongoing efforts, including past CEDS plans and the North County Regional Economic Development Council’s strategic plan. To supplement this, Camoin Associates completed a full economic data analysis, looking at: (a) historic and projected industry and occupation employment data, (b) levels of educational attainment, career pathways, and program completions (i.e. the number of students who successfully completed a program), and (c) various statistical comparisons to both a larger economic region and Upstate New York to identify areas of similarities and differences. For the more detailed economic data analysis, including the full data tables, please see the CEDS Supplement.

The CEDS research also included a summary of the economic development climate in Jefferson County, focusing on: transportation infrastructure, utilities, demographic information, Canadian opportunities, existing economic development organizations and initiatives, and the Fort Drum economy.

The CEDS Committee used this information, as well as numerous interviews with key stakeholders, to identify the strengths, weaknesses, opportunities and threats (SWOT) of the regional economy and to formulate an economic development vision statement. The SWOT analysis and vision exercise helped prioritize and inform the specific goals and initiatives for the Action Plan. The final step of the CEDS process was to use all the previous information to list and prioritize the goals and future actions to achieve the CEDS Committee’s vision for the future. This was done through input from the CEDS Committee as well as specific input from involved agencies and stakeholders. In addition, performance measures were developed so that progress can be reviewed on a regular basis as a way to document successes and areas for improvement.

Vision for the Future

The CEDS Committee developed the following economic development vision for Jefferson County:

In the future, Jefferson County will be recognized for its innovative, entrepreneurial spirit and culture of creativity. Its residents will enjoy a high quality of life and ample employment opportunities. These positive aspects of the community will support the retention of youth and retired military personnel and lead to successful business attraction efforts.

The future Jefferson County will pride itself on its competitive, well-educated workforce. Collaborations between the County's secondary schools, BOCES, SUNY Jefferson Community College and its affiliates, and industry leaders will prepare students to succeed. The labor force will meet the demands of local employers, allowing firms to compete in the global economy.

In the coming years, Fort Drum will continue to be one of the largest employers in New York State, and serve as a foundation of the community, providing employment, business activity, and diversity. Jefferson County will lead the Northeast in the agricultural industry, support the growth of local manufacturing businesses, and will be known for its world-class tourism opportunities. Watertown will continue to serve as a regional service center for healthcare, finance, retail, and government services. The strength of the region's economy will be seen in the thriving local businesses that provide stable and well-paying jobs and in the increasing amount of international investment made in the County.

Major Goals and Initiatives

As noted above, the CEDS process culminates in the Action Plan Matrix, which can be found on page 60 of this document. The Action Plan is a comprehensive list of specific goals and tasks that can be used to implement the CEDS, including the identification of a lead party, priority level, timeline, and other critical information. Below is a brief summary of the Action Plan, showing the major goals and initiatives the Committee has identified for the next five years.

Develop the local workforce to meet 21st century challenges

It is vitally important that our educators teach the skills necessary for students and residents to succeed in the 21st century job market. Ways to address emerging workforce needs include:

- Align workforce development programs with targeted industries
- Bring together educators and employers to jointly address workforce needs
- Encourage internship and apprenticeship partner programs
- Increase awareness of higher education offerings

Cultivate a culture of entrepreneurship

Changes in the economic climate in Jefferson County and throughout the United States have made entrepreneurship and small business development among the fundamental forces behind economic growth. Jefferson County is committed to supporting and encouraging entrepreneurs to help them succeed in their business endeavors. Ways to do so include:

- Expand existing support networks and programs
- Improve access to and promote sources of capital
- Target and support demographics with high potential to be entrepreneurs

Develop first-class amenities to support growth

For Jefferson County to be successful in business expansion and attraction efforts, it must offer new and existing businesses top-rate infrastructure and facilities as well as alternative energy options. These top priorities in the Action Plan include:

- Complete the Watertown International Airport development plan
- Expand broadband access and “last mile” infrastructure
- Help farmers capitalize on regional demand opportunities

Improve business development communications, marketing, and networking

Jefferson County economic development officials should focus on strengthening communication with and between our existing businesses and strive to ensure marketing materials are polished, up-to-date, and provide meaningful, relevant information. Our economic development community will engage elected officials in the process. The community can also take aggressive actions to enhance efforts to attract additional Canadian firms including:

- Promote a “one stop shop” for Canadian businesses
- Facilitate cross-border business to business opportunities
- Finish the Canadian version of JCIDA website

Enhance quality of life advantages of the County

Enhancing quality of life in the County will not only benefit our local residents and existing workforce, it will facilitate business investment and attract employers. We must continue to invest in our quality of life and amenities. Among the initiatives the Committee recommends:

- Continue the development of a housing strategy
- Continue reinvesting in downtowns
- Increase year round arts and cultural offerings
- Support ‘Buy Local’ campaigns and farmers markets

Work to retain, attract and grow the County’s targeted industries

To ensure the long-term economic health of Jefferson County, it must work to develop and improve career opportunities for our current workforce and our youth. Based on a comprehensive review of all available data, Jefferson County is well-positioned to grow and attract businesses in the following industries:

- **Manufacturing** – The County has many legacy manufacturing firms; some have been here for over 100 years. To support these businesses and ensure they continue to prosper, the community should expand manufacturing collaborative initiatives, initiate youth workforce development programs, and target manufacturing supply industries.
- **Tourism, Accommodations, Food Services and Retail Trade** - Retail and service sector industries provide a variety of entry level jobs, attract visitors to the region, and bring vibrancy to the area. The County at large should continue to develop, enhance, and market the recreational resources and special places that this unique area has to offer.
- **Agriculture** - The large cluster of dairy farming in Jefferson County has attracted dairy product manufacturing firms to the County and region and plays a large role in the overall culture of the area. To support the growing agriculture industry in Jefferson County, the community should develop and market local value-added products, investigate the potential for biomass feedstock crop production, and work with the industry to identify and implement solutions impeding growth.

- **Health Care and Social Assistance** - Watertown is also known to be a regional center for health care services. Recommendations for supporting this industry include developing a training cost sharing model to increase the pool of health care workers, tuition repayment programs, an annual health care summit, and continued youth shadowing programs.
- **Information Technology** - Information technology is an important support industry to all of the County's industries; and IT jobs can be found in almost every industry sector. To fully realize this industry's potential, plans should be prepared to develop a technology training and internship program, start an IT peer group, and identify and develop IT skills needed in non-IT industries.
- **Call Centers, Back office Support Industries (Finance, Real Estate, Insurance)** - The potential exists for growth in this segment to support not only existing firms but also to support the growing health care and social assistance industry. As such, local economic development developers should market the community's telecommunication infrastructure and labor force to attract back office operations as well as begin a targeted marketing strategy for call center operations.

The full Action Plan including specific tasks and lead agencies can be found in Section VII of this report.

II. INTRODUCTION

Purpose

Jefferson County is in a transitional period. The rapid economic growth of the last decade, driven by the expansion at Fort Drum, is beginning to stabilize while new opportunities in agriculture, manufacturing, health care and services are emerging. The 2012 Jefferson County CEDS process is designed to continue the momentum of the past decade by capitalizing on emerging opportunities.

Past Planning Efforts

The Comprehensive Economic Development Strategy (CEDS) Committee was created by the Jefferson County Board of Legislators in 1990. Since its formation, the CEDS Committee has supported the County and local economic development agencies by providing a mechanism for economic development planning and by leveraging local access to Federal and other economic development grant funds.

The Committee's original CEDS put forth strategies to capitalize on the County's strengths and assets. In conformity with EDA recommendations, major plan updates occurred in 1999 and 2006. However, as a living document, portions of the plan have been updated annually through an abbreviated review of the economic development strategies. Jefferson County's CEDS not only satisfies Federal requirements but also serves as the community's blueprint for economic development planning and action. The CEDS Committee will continue to make periodic updates to the plan to anticipate changes in the economic climate.

The success of this 2012 CEDS Update not only relies on an awareness of past labors of the CEDS Committee, but previous and ongoing planning efforts by partner organizations throughout the County and the Region. The intention of this CEDS is not to simply replace past economic development or any other planning efforts in the County, its aim is to build upon previous success and learn from less effective efforts. For this 2012 CEDS Update, the following plans and studies were reviewed in detail by Camoin Associates and select members of the Committee:

- 2006 CEDS, Jefferson County
- 2007 CEDS Report Card, Jefferson County
- 2008 CEDS Priorities
- 2010 CEDS Brochure, Jefferson County
- 2011 North County Regional Council Economic Development Plan
- 2007 North County Business and Resource Gap Analysis
- 2008 Fort Drum Growth Management Strategy (Summary Report)
- Fort Drum 2010 Economic Impact Report
- Spring 2010 Manufacturers Survey
- 2011 Jefferson-Lewis County Employer Survey Results
- 2011 Jefferson County State of the Workforce Study
- 2012 Thousand Islands International Tourism Council - Seasonal Homeowners Survey
- Fort Drum Regional Health Planning Organization 2008-2011 Regional Recruitment Project Pilot Project Outcomes
- 2012 Fort Drum Transit Needs Assessment

III. BACKGROUND

Jefferson County Geography

Located in the State of New York at the northeastern corner of Lake Ontario, Jefferson County spans an area of roughly 1,293 square miles making it the 9th largest county in the State.¹ It is situated on the western extent of New York State's North Country Region, roughly 60 miles north of the City of Syracuse, NY. The County is bounded by the St. Lawrence River and St. Lawrence County to the north, Lake Ontario to the west, Lewis County to the east, and Oswego County to the South. Jefferson County is also situated along the international border with Canada and facilitates traffic between the two nations across the St. Lawrence River via the Thousand Islands Bridge.

Jefferson County's physical geography carves the County into five natural regions, each with its own unique character and offerings. A series of small narrow lakes oriented with the St. Lawrence River Valley blanket the northeastern portion of the County known as the Indian River Lakes Region. Cutting east to west through the County, the Black River Valley divides Jefferson in half. The Black River guided early settlement in the region and flows through the County's most populated areas today. Rising out of the valley is the Tug Hill Plateau, which is a large physiographic region that crosses sections of Lewis, Oneida, and Oswego Counties. With an elevation of about 350 feet in the west and 2,000 feet in the east, the Tug Hill Plateau (or simply Tug Hill as it is known in the local vernacular) is known for receiving the greatest average annual snowfall east of the Mississippi. Down off the Tug Hill along the western border of the County is the Lake Ontario Lowlands Region. This region is comprised of large sand dunes, expansive backwater areas, and many bays along the lakeshore with gently rolling fields inland. Finally, the northern border of the County is part of the Thousands Islands Region and St. Lawrence Seaway. This section along the St. Lawrence River is dotted with islands and serves as the gateway from the Great Lakes to the Atlantic Ocean for water-going vessels.

Economic Development Environment

Demographic & Socioeconomic Information

According to estimates by the U.S. Census Bureau, Jefferson County's population is 117,536. The Census Bureau projects that the County's population will reach 121,953 by 2016; however, this projection is based on past trends, which were partially influenced by growth at Fort Drum. At this time, the population at the Fort Drum installation is projected to stay roughly at its current level and it is expected that the population of Jefferson County will remain relatively stable or experience a moderate increase in the coming years. There are approximately 43,967 households and 30,038 families in the County. The median age is 32.8 and is expected to increase to 33.3 by 2016.

Compared to New York State (NYS) and the nation as a whole, Jefferson County's population and number of households are expected to grow over the short term at a faster rate. Comparatively, the median age in Jefferson County of 32.8 is lower than that of New York State or the nation, which are both around 37 years old. The lower median age in the County is low largely due to the demographics of Fort Drum soldiers and their families.

¹ U.S. Census Bureau

Demographic Indicators				
Jefferson County	2011	2016	# Change	% Change
Population	117,536	121,953	4,417	3.76%
Households	43,967	45,938	1,971	4.48%
Families	30,038	31,094	1,056	3.52%
Median Age	32.8	33.3	0.5	1.52%
New York State	2011	2016	# Change	% Change
Population	19,425,339	19,624,672	199,333	1.03%
Households	7,335,843	7,440,161	104,318	1.42%
Families	4,662,961	4,680,148	17,187	0.37%
Median Age	37.9	38.0	0.1	0.26%
United States	2011	2016	# Change	% Change
Population	308,745,538	310,704,322	1,958,784	0.63%
Households	116,716,292	117,457,661	741,369	0.64%
Families	77,538,296	78,084,849	546,553	0.70%
Median Age	37.1	37.2	0.1	0.27%

Source: U.S. Census Bureau, Population Division; ESRI

The median household income in Jefferson County is \$41,811.² The average household income³ is over \$10,000 greater than the median at \$53,827. Per capita income is about \$20,438. By 2016, the median household income in the County is expected to increase by about 18% and reach approximately \$50,000. Both average household income and per capita income are expected to increase by about 10% by 2016. Compared to New York State and the United States, Jefferson County's per capita income is anticipated to grow more slowly over the next few years. Furthermore, the income data is showing a continuation of lower income levels in Jefferson County compared to the other geographies.

Socioeconomic Indicators				
Jefferson County	2011	2016	# Change	% Change
Median Household Income	\$41,811	\$49,514	\$7,703	18.42%
Average Household Income	\$53,827	\$59,013	\$5,186	9.63%
Per Capita Income	\$20,438	\$22,531	\$2,093	10.24%
New York State	2011	2016	# Change	% Change
Median Household Income	\$54,080	\$64,366	\$10,286	19.02%
Average Household Income	\$77,121	\$89,773	\$12,652	16.41%
Per Capita Income	\$29,922	\$34,852	\$4,930	16.48%
United States	2011	2016	# Change	% Change
Median Household Income	\$50,227	\$57,536	\$7,309	14.55%
Average Household Income	\$68,013	\$77,476	\$9,463	13.91%
Per Capita Income	\$26,391	\$30,027	\$3,636	13.78%

Source: ESRI

² Median HH Income: Value of the midpoint of the distribution of household income in the region.

³ Average HH Income: Obtained by adding all household incomes and dividing by the number of households.

Education Attainment

There are eleven school districts in Jefferson County, ranging in annual class sizes from around 30 students to over 200 students. In the 2010-11 graduating class, there were 1,287 students; 1,112 graduated (86%) and 175 were non-completers (14%). Approximately 29% of the County's graduating seniors plan on attending a 4-year college and about 44% plan on attending a 2-year college. Just over 5% intend on entering the military and 14% will begin working.

Graduation Rates & Post-Secondary Plans for Graduates 2010-11												
	Alexandria	Belleville Henderson	Carthage	General Brown	Indian River	LaFargeville	Lyme	Sackets Harbor	South Jefferson	Thousand Islands	Watertown	Total
Total Graduates	45	39	198	100	178	47	27	30	133	93	222	1,112
Regents Diploma	40	34	167	94	152	39	26	29	117	82	186	966
Total Noncompleters	6	3	27	9	22	10	1	3	16	6	72	175
Total Class Size	51	42	225	109	200	57	28	33	149	99	294	1,287
Post-secondary Plans for Graduates												
4-year college	14	8	70	25	52	8	6	13	43	37	57	333
2-year college	20	22	81	63	89	19	13	13	57	29	97	503
Other post-secondary	5	0	3	0	3	2	1		0	5	3	22
Military	2	1	18	2	8	1	1	3	3	7	14	60
Employment	4	10	28	9	22	19	6	5	30	16	17	166
Adult Services	0	0	0	0	1	0	0	0	0	0	3	4
Other	0	0	2	0	5	0	0	0	4	0	17	28
Unknown	0	0	1	1	0	0	0	0	1	0	23	26
Total	45	41	203	100	180	49	27	34	138	94	231	1,142

Source: <https://reportcards.nysed.gov/view.php?schedist=district&county=22&year=2011>

About 87% of Jefferson County's population has a high school diploma and over 50% has at least some college. Over 20% of the population has earned a Bachelor's degree and almost 9% a Graduate degree. Compared to New York State and the U.S. as a whole, a greater portion of the Jefferson County residents hold an Associate's degree and a slightly smaller portion of Jefferson County residents have achieved a Bachelor's degree or a Graduate degree.

Educational Attainment		
Jefferson County	%	Cumulative %
Some School	13.1%	100.0%
HS Graduation	35.7%	86.9%
Some College	19.3%	51.2%
Associate's Degree	11.3%	31.9%
Bachelor's Degree	11.9%	20.6%
Graduate Degree	8.7%	8.7%
New York State	%	Cumulative %
Some School	16.2%	100.0%
HS Graduation	27.6%	83.8%
Some College	16.1%	56.2%
Associate's Degree	8.2%	40.1%
Bachelor's Degree	18.2%	31.9%
Graduate Degree	13.7%	13.7%
United States	%	Cumulative %
Some School	15.4%	100.0%
HS Graduation	28.5%	84.6%
Some College	20.9%	56.1%
Associate's Degree	7.5%	35.2%
Bachelor's Degree	17.5%	27.7%
Graduate Degree	10.2%	10.2%

Source: EMSI

The Center for Community Studies at Jefferson Community College recently completed the 2012 *Jefferson County Seasonal Resident Survey*, which included gathering information on educational attainment levels of these part-time residents. Compared to the full County population, seasonal residents have attained higher levels of education, with almost 90% having some college and almost 65% having at least a Bachelor's degree.

Educational Attainment of Seasonal Residents		
Education Level	%	Cumulative %
HS Graduation	10.8%	100.0%
Some College	24.6%	89.2%
Bachelor's Degree	27.4%	64.6%
Graduate Degree	37.2%	37.2%

Source: 2012 Jefferson County Seasonal Resident Survey

Housing Data

According to ESRI data, the average household size in Jefferson County is 2.53 persons. Of the 43,967 occupied housing units in the County, approximately 25,395 (58%) are owner occupied and 18,572 (42%) are renter occupied.

Housing Characteristics	
	2011
Average Household Size	2.53
Owner Occupied Housing Units	25,395
Renter Occupied Housing Units	18,572
Total Occupied Housing Units	43,967

Source: ESRI

GAR Associates, Inc. completed a housing analysis of the Fort Drum and Watertown real estate market in August/September 2011. This market analysis found that as of late summer/early fall 2011, the housing market was relatively stable with an average occupancy of 95%. Between 2008 and 2011 over 1,610 newly constructed units became available. The report projects that while there is no additional growth anticipated related to soldiers assigned to Fort Drum, there will be an increase in market demand because of change in deployment schedules and other variables. Based on the net demand analysis, there will be a need for up to about 1,300 units. Recent reports indicate that there are over 1,000 housing units currently under construction in the County to meet the majority of that demand and additional projects are being considered. The GAR report concludes that the market will remain relatively stable in the near future. For new future developments to succeed, they must fit a niche market and offer amenities or locational advantages that are not currently available in the market.

According to the 2010 American Community Survey 1-year estimates, the median home value in Jefferson County was \$128,200, which was \$168,300 lower than the median home value in the State and \$51,700 below the National median home value. On the rental side, median gross rent in Jefferson County was \$831 a month compared to \$1,020 in the State and \$855 in the Nation. County monthly gross rent - includes all operating expenses - was just \$24/month below the National level and \$189/month below New York State (including the New York City metropolitan region).

Housing Costs			
	County	State	U.S.
Median Home Value	\$128,200	\$296,500	\$179,900
Median Gross Rent	\$831	\$1,020	\$855

Source: American Community Survey 2010 - 1yr Estimates

According to the 2012 Fair Market Rent Documentation System managed by the U.S. Department of Housing and Urban Development (HUD), the current fair market rental rates⁴ for Jefferson County are:

2012 Fair Market Rent by Unit Bedrooms					
Bedrooms	Efficiency	1	2	3	4
Fair Market Rent	\$696	\$697	\$838	\$1,080	\$1,135

Source: U.S. HUD Fair Market Rent Documentation System

In addition to the national data, local rental information about existing available apartments was reviewed. In May 2012, there were 61 apartment units available on the market and the average asking lease rate was \$1,054.

⁴ Fair Market Rent: Indicates the amount of money that a given rental property would sell for if it were available for leasing. The current legal definition of Fair Market Rent is *...the 40th percentile of gross rents for typical, non-standard rental units occupied by recent movers in a local housing market.* <http://www.huduser.org/periodicals/USHMC/winter98/summary-2.html>.

Available Apartments					
Bedrooms	1	2	3	4	Total /Avg.
Units Available	2	22	29	8	61
Average Rent	\$823	\$908	\$1,130	\$1,241	\$1,054

Source: Apartment Availability Report, May 2012

Housing was identified throughout the planning process as a major concern for residents and employers. The impact of Fort Drum on the housing market in the Watertown area has increased prices to more than some families can afford on civilian salaries. Furthermore, the constant stream of potential tenants in need of housing provides a disincentive to some property owners from making improvements leading to situations where there is a disconnect between the quality of the housing and rental prices.

Cost of Living

The following table compares the cost of living in Watertown, NY to several Upstate New York cities and Port Huron, a comparably sized city in Michigan that also has a border crossing between U.S. and Canada. While this data is city-specific, most of the sources used to generate the index are county-level data. The cost of living in Watertown, NY is just slightly above the U.S. average (the national average being 100 in all categories).⁵

The category in which the cost of living in Watertown is the greatest compared to the national average is utilities. The nearby cities of Syracuse and Oswego have comparable utility costs. Housing (including renter-occupied and owner-occupied units) is the lowest category compared to the national average for the City of Watertown but it is still higher than the other regional and comparison cities examined, with the exception of Saratoga Springs. Compared to Port Huron, MI, Watertown has a much greater cost of living overall and within each category.

Cost of Living Index							
	Overall	Grocery	Health	Housing	Utilities	Trans.	Misc.
Watertown, NY	103	110	109	81	124	106	111
Plattsburgh, NY	98	104	116	81	110	102	100
Buffalo, NY	78	93	92	32	109	102	89
Syracuse, NY	100	110	108	70	125	109	110
Oswego, NY	95	112	112	50	126	108	112
Saratoga Springs, NY	127	104	104	177	105	103	113
Port Huron, MI	83	100	96	43	107	103	95

Source: Sperling's Best Places: <http://www.bestplaces.net/>

Cost of Living Index Key:

Overall - The total of all the cost of living categories weighted as follows:

- Housing: 30%
- Grocery: 15%
- Transportation: 10%
- Utilities: 6%
- Health Care: 7%
- Miscellaneous: 32%

Grocery - The average cost of food and groceries, not including restaurants.

⁵ The Cost of Living Index is updated quarterly using data at the zip code and County level from the Consumer Price Index (Bureau of Labor Statistics), Medicare and the U.S. Department of Health and Human Services, Consumer Expenditure Survey (BLS), Department of Energy, Federal Tax Directory, National Association of Realtors, Home Price Mortgage Index from Freddie Mac, median home sales prices from state realtor associations and county deed records, Coldwell Banker' Home Price Index, and addition research. Data used in this report was current as of the First Quarter 2012.

Health - The average cost of health care calculated using the standard daily rate for a hospital room, and the costs of a doctor's office visit, and a dental checkup.

Housing - The average cost of an area's housing, which includes mortgage payments, apartment rents, and property tax.

Utilities - The average cost of heating or cooling a typical residence for the area, including electricity and natural gas.

Transportation - The average cost of gasoline, car insurance and maintenance, and mass transit for the area.

Miscellaneous - The cost of goods and services not included above, including clothing, restaurants, repairs, entertainment, and other services.

County Economic Development Tools

Jefferson County has access to several economic development resources and business incentive programs, including:

- **Low-cost financing** through revolving loan funds and microenterprise funds
- **Industrial revenue bonds**
- **Tax incentives:** property tax, sales tax, and mortgage recording tax abatement
- **Foreign trade zone opportunities** for duty deferral and relief
- **State tax credits** for job creation, capital investment, and research & development
- **Technical assistance** with business planning, site selection, funding applications, and international trade

The County's economic development partners include agencies with a county-wide and a local focus, organizations with regional jurisdiction, and assorted support and resource agencies. These organizations and programs are described below.

County and Local Organizations & Programs

The **Jefferson County Industrial Development Agency (JCIDA)** is the lead economic development organization in Jefferson County. The agency is responsible for marketing Jefferson County as a strategic business location and for working to retain and grow existing businesses, including the agricultural sector. To assist business development and expansion, the JCIDA operates three revolving loan funds and provides tax and financial incentives for qualified projects. These incentives include property tax, sales tax, and mortgage recording tax abatements, and industrial revenue bonds. The JCIDA also has two subsidiary organizations to assist in economic development activities. One is the Jefferson County Local Development Corporation, which can provide revolving loans or grants to qualifying projects. The other is the Jefferson County Civic Facilities Development Corporation, which can offer tax-exempt bonds to Civic Facility Projects.

Jefferson County is host to **Foreign Trade Zone (FTZ) 109**, managed by the JCIDA. The FTZ program provides duty deferral and relief, as well as a number of other cost-saving and logistical benefits, to companies that import raw materials and components, or goods for packaging and distribution. The three Foreign Trade Zone sites in the county include the Jefferson County Corporate Park, City Center Industrial Park, and the Watertown Airport Corporate Park. Trade zone status can also be provided elsewhere in the county to specific sites with qualifying activity.

The **Workplace** is a one-stop career center that provides comprehensive training and employment services for job seekers in Jefferson County. For businesses, the Workplace provides customized recruitment, screening, and referral of potential employees. It also administers several on-the-job

training programs that, for qualified positions, help to offset the wage paid to employees during the initial training period. In addition, the Workplace staffs the **Jefferson-Lewis Workforce Investment Board**, which provides input and oversight (and sometimes funding) for the design and delivery of the workforce development system in Jefferson and Lewis Counties.

The **Watertown Local Development Corporation** supports economic development and financing activities within the City of Watertown. It operates a revolving loan fund and a micro-enterprise loan fund, in addition to managing the City Center Industrial Park. Several other communities throughout the county also have their own local development corporations. Some of these also administer a revolving loan fund, but all play an active role in maintaining their community's economic vitality. These include the **Cape Vincent Local Development Corporation**, **Carthage Industrial Development Corporation**, **Clayton Local Development Corporation**, and **Sackets Harbor Local Development Corporation**.

County Support Organizations

The **Small Business Development Center (SBDC)** assists entrepreneurs, small businesses, and industry through advising, training, and research. SBDC advisors assist with business planning and budgeting, management practices, and loan applications for start-ups and expansions. The SBDC offers a regular six-week course for entrepreneurs and small business owners and also hosts a variety of workshops on specific topics.

The **Greater Watertown-North Country Chamber of Commerce** provides an extensive set of business-to-business networking activities and is an advocate for business interests at the local and state levels. The Chamber also hosts a number of speakers, educational workshops, and events that address business needs and interests.

The **Jefferson Community College (JCC)** is one of the 64 campuses – and one of 30 community colleges – that comprise the State University of New York (SUNY) system. When it comes to support for economic development activity, the college plays an important role in workforce development. In addition to its many degree programs, JCC offers customized training services to local employers, as well as a variety of continuing education programs aimed at enhancing workplace skills. JCC also houses the **Center for Community Studies**, a research, survey, and policy analysis resource for the region. The Center's services have often been used to gather data for economic development analysis and planning.

The **Jefferson-Lewis Board of Cooperative Educational Services (BOCES)** has played an increasingly important role in workforce development. In addition to its high school programs, BOCES provides adult continuing education courses in some of the key trade skills needed by local contractors and manufacturers. BOCES can also provide customized training for local employers.

The **Jefferson County Department of Planning** has continued to play the lead role in coordinating the work of the CEDS Committee, monitoring progress on CEDS goals, and ensuring that the priority goals are reviewed and updated on a regular basis. Ongoing economic development support activities include technical support for Fort Drum-related growth activities, GIS mapping support for various economic development projects, and maintaining Census and other economic data for Jefferson County. The department has also played a major role in capitalizing the local revolving loan funds administered by the JCIDA, through the County's participation in the Community Development Block Grant Program.

Regional Organizations

The **Thousand Islands Regional Tourism Development Corporation**, doing business as the **Thousand Islands International Tourism Council**, promotes the 1000 Islands region, including Jefferson County. The mission of the Council is the development, promotion, enhancement, and retention of the local tourism industry and its associated employment base. The Council operates a comprehensive, multi-faceted tourism marketing program, and sponsors a number of survey and research efforts that aid strategic planning for local tourism service providers and the industry as a whole.

The **Thousand Islands Bridge Authority** operates and maintains the Thousand Islands International Bridge system that connects Jefferson County to the Province of Ontario, Canada. The Authority is active in a number of economic development initiatives, including sponsorship of **The Capital Corridor**. The Capital Corridor is a bi-national transportation network that promotes the 500-mile trade and tourism corridor linking Ottawa, Ontario and Washington, DC.

The **Development Authority of the North Country (DANC)** was created by the New York State Legislature in 1985 and was charged with “supplying the infrastructure required by the expansion of Fort Drum, and leveraging the expansion for the economic well-being of the citizens of Jefferson, Lewis, and St. Lawrence Counties”. The Authority continues to address this mission through infrastructure projects such as the regional solid waste disposal facility in Rodman, wastewater and freshwater transmission systems servicing Fort Drum and other communities, and housing and telecommunications projects to enhance quality of life and economic development opportunities.

The **North Country Alliance (NCA)** is a consortium of economic development agencies working across the seven-county North Country region. The NCA provides working capital to small businesses in the region and serves as a united voice on issues impacting the North Country economy.

The **Fort Drum Regional Liaison Organization (FDRLO)** is a community-based membership organization “to foster effective communication, understanding and support by serving as the primary point of coordination and advocacy for resolution of those issues of mutual interest of the military and civilian community of the Fort Drum region”. Recognizing Fort Drum as the largest economic force in the region and the county, FDRLO is active on several fronts to maintain and enhance the presence of the post and to facilitate Fort Drum-related housing and economic development opportunities for the benefit of the tri-county region.

The **NYS Tug Hill Commission** is a non-regulatory state agency charged with helping local governments, public organizations, and citizens shape the future of the Tug Hill region (covering portions of Jefferson, Lewis, Oswego, and Oneida Counties). The Commission uses a grassroots approach to provide technical assistance and training to Tug Hill’s rural communities in the areas of land use planning, community economic development, and natural resource management.

The **Empire State Development Corporation (ESD)** is New York State's lead economic development agency, providing a wide array of capital funding, tax credits, and other forms of assistance to enhance business growth and development. Jefferson County is served by the ESD office in Watertown.

Transportation

Air Transportation

Watertown International Airport

The Watertown International Airport (airport code “ART”) is in the Town of Hounsfield, NY (10 minutes west of the City of Watertown on Route 12 and 35 minutes south of the Canadian border). This airport is owned and operated by Jefferson County and offers two round trips daily (except on Sunday) to the Chicago O’Hare International Airport through American Airlines affiliate American Eagle. American Eagle began providing 44-passenger jet service in November 2011 (note that the previous airline provided service to Albany with 9-seater propeller planes). The following table calculates the average number of passengers that travel through the Watertown International Airport per month and annually.

Watertown International Airport Enplanements Number of Passengers			
Month	Departures	Arrivals	Total Passengers
November '11	546	567	1,113
December '11	1,396	2,244	3,640
January '12	978	999	1,977
February '12	1,266	1,185	2,451
March '12	1,481	1,380	2,861
April '12	1,394	1,539	2,933
Average Per Month To Date	1,177	1,319	2,496
Annual	14,122	15,828	29,950

Source: Watertown International Airport

The Jefferson County 2010 CEDS noted a goal of achieving at least 10,000 passengers annually for the facility and as of July 2012 the County had already reached that number for the year, putting them on pace to far exceed that goal.⁶ There has been a substantial increase in the amount of airline passenger traffic and it has provided an additional transportation option for business owners, visitors, military families and vendors. Canadian utilization of the airport seems to be on the rise because of its close proximity to the border. The airport is also available for corporate air services, which is attractive for corporate executives and others who may be considering the Watertown area for a new project. Furthermore, there is initial discussion regarding the feasibility of a business/commerce park being developed on the land surrounding the airport.

Syracuse Hancock International Airport

Another option for residents, tourists, and military families is to travel approximately one hour south to Syracuse, NY to the Syracuse Hancock International Airport (airport code "SYR"). This airport offers additional connection options and serves millions of people throughout central and upstate New York and Canada. Data shows that in 2009, a total of 1,024,227 enplanements (approximately 2,800 daily) and 19,340 landings (approximately 53 daily) occurred.⁷ The Syracuse Regional Airport Authority and the City of Syracuse are working to increase air service by adding service to more destinations, which would assist with regional economic development efforts and make the airport more convenient and efficient for central New York and upstate New York travelers.

The Syracuse Hancock International Airport currently serves the following airports: Atlanta, Boston, Charlotte, Chicago, Cincinnati, Detroit, Minneapolis, New York (Newark, JFK and Laganrdia), Orlando, Philadelphia, Toronto and Washington DC. The following air lines have service from SYR: Delta, US Airways, United Airlines, American Airlines, Jet Blue and Air Canada.

Rail Transportation

Passenger

The only passenger train service that serves Upstate New York is Amtrak, which does not have a station in Jefferson County. The nearest Amtrak stations are in Syracuse, NY and Rome, NY. Amtrak does provide easy service to Quebec, Albany, and New York City as well as many points south and west via rail. Canadian passenger service is available at nearby Kingston and Brockville, Ontario.

⁶ Amaral, B. Airport Reaches Milestone. Watertown Daily Times. July 9, 2012.
<http://www.watertowndailytimes.com/article/20120709/NEWS03/707099928>

⁷ <http://www.syrairport.org/about/hancockfield/factsandfigs.cfm>

Commercial

Rail as a mode of transportation and its role in the shipment of goods was diminished in the end of the last century as more and more businesses began using trucks to move their goods. With the rising cost of fuel and the increased attention on sustainability, rail seems to be making a comeback. On average, railroads are three or more times more fuel efficient than the alternative. Trains can move a ton of freight nearly 500 miles on a single gallon of fuel.

CSX, an international transportation company offering a variety of rail, container-shipping, intermodal, trucking, and contract logistics services, provides shipping services through Jefferson County. The map to the right shows the CSX facilities in New York including the rail that runs through the County. In 2010, CSX handled nearly 905,000 carloads of freight in New York alone and employed 2,000 people. Typical products shipped by CSX in New York include, coal, ethanol, wheat, and municipal and construction waste.⁸

Rail spurs throughout Jefferson County allow easy access for industries looking to bring in components or transport their goods straight from their place of production or storage to customers. Some of the County's rail spurs need repairs to be brought back into service. Access to these spurs is very attractive to potential businesses looking to locate in the County. The spurs are useful to both manufacturing and agricultural firms needing to move product long distances affordably and reliably.

Representatives from CSX note that they operate a single northbound and southbound train each day between the Selkirk Yard in Albany, NY, and the connection with the Canadian National Railroad in Quebec. Daily trains typically carry a mix of freight including cars for local industries as well as through freight cars to and from Canada (such as loads of lumber).

Currently the maximum train length is restricted to 5,000' due to the fact that the siding tracks can only accommodate a train of this length in order to pass one another. CSX has long term plans to extend several sidings along the line to accommodate longer trains.

Ground Transportation

The major ground transportation artery in and out of Jefferson County is Interstate 81 (I-81). This interstate highway connects the Thousand Islands International Bridge to Dandridge, Tennessee. Since the region I-81 transects is mostly rural, it is heavily used as a trucking corridor to bypass Interstate 95, which connects the major metropolitan areas along the East Coast and can become very congested. In Jefferson County, approximately 15,000 to 30,000 vehicles use I-81 daily. Other major roads in the County include US Routes 11 and 12 and New York State Routes 37 and 3.



⁸ CSX <http://www.csx.com/index.cfm/about-csx/company-overview/state-fact-sheets/new-york/>

The Thousand Islands International Bridge connects Jefferson County to Ontario, Canada. The bridge has one American span, three Canadian spans, and one International span. The American span is 800 feet between towers, 150 feet above water and has two 1,500 foot viaducts. The Bridge had over 2 million vehicle crossings in 2011, which included over 350,000 commercial vehicle crossings.



For those without a private vehicle, there are limited transportation options within Jefferson County. One option within the City of Watertown is the CITIBUS Transit system, which offers services throughout the major corridors within the City of Watertown and access to major retail offerings along Arsenal Street, and throughout the residential neighborhoods.

The January 2012 Fort Drum Transit Needs Assessment prepared by Nelson/Nygaard includes a comprehensive inventory and assessment of the local transportation needs as it relates to Fort Drum and the surrounding communities. This Transit Needs Assessment includes recommendations for improvements to the existing system including van pools, hotel shuttles, on-post shuttle route expansions and the creation of a Regional Transit Committee, among others. These recommendations will improve the quality of life for soldiers and residents of Jefferson County and should be considered as part of this comprehensive plan.

Infrastructure

Telecommunications

For many rural communities, access to telecommunications infrastructure is a major struggle that must be mitigated when working to achieve economic development goals. There has been significant investment in fiber optics and telecommunication infrastructure, but Jefferson County is not fully connected. Specifically, the lack of telecommunications infrastructure in certain areas of the County has created challenges in attracting different kinds of businesses and for existing and potential residents looking to work from home.

In terms of fiber optics access, the Development Authority of the North Country (DANC) manages hundreds of miles of fiber, including a loop that runs between Watertown, Utica and Syracuse. DANC built an Open Access Telecom Network, which is a fiber optic transport system that operates throughout Jefferson, Lewis, and St. Lawrence Counties and connects to major global carrier facilities in Syracuse. This 1,000 mile state of the art fiber optic transmission network has 14 points of presences (POPs) that provide wholesale optical and Ethernet circuits. The circuits are leased to telecommunication carriers who offer end-users with a variety of services, including dial tone, data and internet access. DANC will provide the “last mile” infrastructure to individual businesses if requested by other service providers. There are also some smaller providers that are willing to make that investment to connect to the smaller population centers and individual users, like Westelcom.

As mentioned above, one of the challenges that Jefferson County is facing is what is known as the “last mile” of connectivity. The last mile is missing in the southern and northeast sections of Jefferson County in terms of connecting to smaller businesses which prohibits them from joining the regional networks. For example, the County is working to develop a health information technology network among health

care providers to allow for sharing of records, digital file transfer and overall improved communication and efficiency; but some of the small health care providers and their patients throughout the County are excluded from this advanced technology because they cannot connect to the fiber optic system. The larger telecom providers are not willing to make the investment, although there are some smaller providers that could. Another option would be to create public private partnerships between providers and public agencies that have a need for increased fiber optics.

Sewer and Water

The City of Watertown Municipal System provides water and wastewater services to a large portion of the residents and businesses in Jefferson County. The City of Watertown Water Plant can handle 15 million gallons per day (MGD) and averages about 4.8 MGD. The William T. Field Memorial Pollution Control Plant is a secondary facility that can handle 16 MGD and treats an average of 10.9 MGD. The City of Watertown Pollution Control Plant provides wastewater treatment services for the County and can handle up to 14 MGD but typically handles 6 to 7 MGD. (Information from Jefferson County Industrial Development Agency website). With respect to economic development initiatives, the existing City of Watertown Municipal System is operating below capacity and is therefore capable of accommodating additional growth,

Several other smaller water and wastewater treatment facilities serve outlying population centers in the County. Capacity at the smaller facilities varies and not all have extra capacity to service new major users.

Energy and Utilities

National Grid provides the County's residents and businesses with electricity and portions of the County with natural gas service. National Grid can provide industries with a variety of services to meet their needs and efficiently adjust with changing technology and electricity/energy demands. The North Country Regional Council's Economic Development Plan states that "the traditional power resources and transmission systems are well established throughout the region." While systems are established throughout the North Country, energy transmission capability for new large scale producers is limited.

An alternative energy source that poses a strong potential for Jefferson County is biomass. Jefferson County has the land, agricultural knowledge, forest area, and open space needed to make biomass energy a reality for increasingly larger projects. On Fort Drum, ReEnergy, Inc is slated to open a 60 megawatt cogeneration plant in early 2013. One-third of the energy produced will meet the Fort's needs and the remainder will be sold to the grid. This project will establish the initial demand and support services necessary to strengthen the market for the biofuel sources (such as switchgrass and willow). Biomass facilities can provide energy to a specific project or industrial park or act on a larger scale and provide energy back to the grid. While biomass does pose significant opportunities for the County, the potential challenges should be considered as well, including the price relative to natural gas and other options, the ability to access Federal production tax credits, and the sustainability of using federal credits for biomass products.

As described in the North Country Regional Council's Economic Development Plan, the North Country and Jefferson County have significant wind resources. In fact, 50% of the installed wind generated in New York State comes from the North Country; however there are no installed commercial wind turbines in Jefferson County at this time. Hydropower is also a significant energy generator in the North Country and currently generates 2,200 megawatts of energy for the grid.

The Fort Drum Economy

With around 24,000 employees, Fort Drum is the largest single-site employer in Jefferson County and in Upstate New York. Its position in the local and regional economy is substantial. The focus of this

Comprehensive Economic Development Strategy and all related analysis is on Jefferson County as a whole; however, it would not be a complete analysis if a review of the impact of Fort Drum was not included.

Specific industry and occupation information about operations at Fort Drum are confidential and could not be acquired for this analysis. However, some information has been made available that can be used to understand operations at the post and qualitatively assess its role in Jefferson County's economy. The following information is from the Fort Drum Economic Impact Statements for 2010 and 2011 as well as conversations with other stakeholders.

Economic impacts are most commonly described in terms of three indicators: **jobs** created, **wages** earned by workers in those positions, and **sales** made by businesses employing the workers. The following is a brief breakdown of these three indicators as they relate to the significant impact of Fort Drum on the local - regional economy.

Jobs

As shown in the table below, Fort Drum itself employed a total of 24,273 workers in 2010 and 24,592 in 2011. Of these positions, 19,447 were military and 4,826 were civilian positions in 2010, and there were 19,978 military and 4,614 civilian positions in 2011. One reason for the slight decline in civilian employment from 2010 to 2011 may be due to recent pressure to decrease positions in the installation command (described in greater detail below).

Fort Drum Employment Data		
Personnel Category	2010	2011
Military	19,447	19,978
Civilian	4,826	4,614
Total	24,273	24,592

Source: Fort Drum Economic Impact Statement, 2010, 2011

Tenant organizations are those government (military and non-military), non-government, and private organizations that have a presence at Fort Drum. In addition to the 10th Mountain Division, Fort Drum is home to a number of tenant organizations and contractors, whose employees are represented in the employment data provided in the "Economic Data Analysis" section of this report and the CEDS Supplement.

Fort Drum also is the home installation or training installation for many units for various branches of the military. Garrison command is the entity that oversees on-post operations, similar to a city government. In 2010 there were over 1,200 government positions in the garrison command. However, as mentioned above, in the past few years there has been some pressure to reduce that number.

There are also many contractors that represent a portion of the civilian employment on post (roughly over 1,000 civilian non-government employees out of the total of 4,800 in 2010).

Wages

Employment and payroll is the largest spending category reported by Fort Drum and, according to the 2011 Economic Impact Report, averages nearly 75% of the total \$1.6 billion yearly of direct economic impact.⁹ Of the \$1.6 billion, payrolls for Fort Drum military, civilian, contractor, and retiree benefits totaled over \$1.26 billion in 2011. Military payroll accounts for approximately \$1 billion and civilian pay

⁹ The impact studies of Fort Drum's economic impact measure "direct" economic impact in terms of total dollars spent on payroll, housing initiatives, contracting, tuition assistance, monetary charitable donations, federal aid to school districts, and other programs.

is over \$200 million. Additionally, there are about 2,353 retirees within the zip code 136XX¹⁰ that receive over \$45 million a year.

This \$1.6 billion is what is referred to as a “direct” impact. The wages earned by these employees circulate through the economy and generate secondary or “indirect” impacts as the workers spend their earnings on housing, food, healthcare, entertainment, and other purchases.

Sales

Fort Drum is a major consumer. In 2011, Fort Drum contracted for \$94.5 million of goods and services. The following table summarizes some of the goods and services that the post contracted for, as well as an estimate of the contract amounts with local businesses in Jefferson, Lewis, and St. Lawrence County (“Tri County”). The table also shows credit card purchases made by employees for post-related expenses. Of the over \$94.5 million in contracting spending, businesses in the Tri County area received roughly 42% of the contracts totaling almost \$40 million.

Fort Drum Contractor Contracting, 2011			
Contract Type	Total	Tri-County	% Tri County
Construction	\$43,887,988	\$18,451,610	42.0%
Service	\$16,922,547	\$10,874,348	64.3%
Supply	\$18,215,530	\$1,395,819	7.7%
Credit Card Purchases	\$15,506,600	\$9,058,067	58.4%
Total	\$94,532,665	\$39,779,844	42.1%

Source: Fort Drum Economic Impact Statement, 2011

In addition to contracts directly with Fort Drum, one of the post’s tenants, the U.S. Army Corps of Engineers, awarded construction contracts totaling \$202 million for work at Fort Drum. Other external agencies awarded \$46.7 million in contracts for supplies, services, maintenance, and labor.

Even beyond work directly related to Fort Drum or the tenants, the military personnel that are stationed at Fort Drum have a major impact on the local economy through purchases of consumer goods and services throughout the region. Much of the retail sector and hospitality sector is driven by Fort Drum in the Watertown area and many business owners depend on the Fort Drum customers as part of their business plan.

Fort Drum also has several ongoing initiatives and programs that generate a significant amount of spending locally and regionally. Two housing initiatives - Mountain Community Homes and the Domestic Lease Program - generated about \$22 million in spending. Medical services generated \$27.5 million in spending and dental services totaled \$5.8 million in 2011. Approximately \$863,000 was spent on tuition assistance and centralized education programs. Local school districts that have some of their district lands removed from the tax rolls due to property owned by the Federal Government received roughly \$21.8 million in federal impact aid. In addition to the spending outlined above, a number of smaller-scale initiatives generate additional spending by Fort Drum and its tenant organizations. For additional detail on these programs please refer to the 2011 Fort Drum Economic Impact Statement.

Overall Impact

The Fort Drum Regional Liaison Organization worked with Economic Development Research Group to develop a *Fort Drum Economic Impact Estimator* tool to calculate the indirect impacts of the post. In 2010, based on \$1.54 billion in direct spending, the model estimates another \$.4 billion occurring in indirect and induced spending for a total of \$1.94 billion in gross economic output. The model also

¹⁰ Symbolizes all zip codes within the initial 136 identifier.

estimates total new jobs created as a result of the post. In 2010, the model estimated that there were 26,535 direct jobs and 7,261 indirect and induced jobs in the tri-County area as a result of Fort Drum.

Considering the various impacts described above, Fort Drum is a dominate driver of economic activity in Jefferson County and Upstate New York. It is responsible for over 34% of the County's workforce; not including indirect job creation. As such, it is vital for County and regional leaders to continue frequent and meaningful communication with Fort Drum leaders and decision makers to ensure that the needs of the post are being met by local infrastructure, workforce, technology, and other services. Through this dialog, additional opportunities for local business to capture a greater portion of contract work may be exposed.

Canadian Investment

Jefferson County is well positioned to capitalize on its proximity to Ontario, Canada through business attraction and expansion efforts. Jefferson County economic development officials are hard at work building networks, increasing marketing, and attracting Canadian investment. With funding support from National Grid, officials have recently initiated a comprehensive marketing campaign that includes:

- Purchasing advertising in Canada's largest industry and trade association magazine, Canadian Manufacturers & Exporters (CME)
- Purchasing web advertising on CME's website
- Attending trade show events in Canada
- Hosting workshops for Canadian businesses throughout Eastern Ontario
- Membership in Canadian-based organizations including the Chamber of Commerce in Canada and Interactive Manufacturing Innovation Network (iMiN)

Jefferson County economic development officials are working to build networks and relationships with Canadian manufacturing firms to help spur partnerships and customer opportunities that will benefit County residents and businesses. One of the efforts to build these relationships is to be a part of the iMiN, a Canadian organization focused on the Ontario region of Canada with the goal of helping manufacturers to become more innovative. The JCIDA is the only US member of the iMiN at this time and the JCJDC's Deputy CEO serves on their steering committee for the eastern Ontario region. In the fall of 2011, the JCJDC and iMiN held a joint networking event for US and Canadian manufacturers. The efforts are vital to building partnerships and networks with Canadian businesses and for Jefferson County to be an international business location.¹¹

The following section outlines some of the major economic development indicators for the nearby Canadian cities that could provide some insight into how Jefferson County can capture some of the economic activity that is occurring near the border.¹²

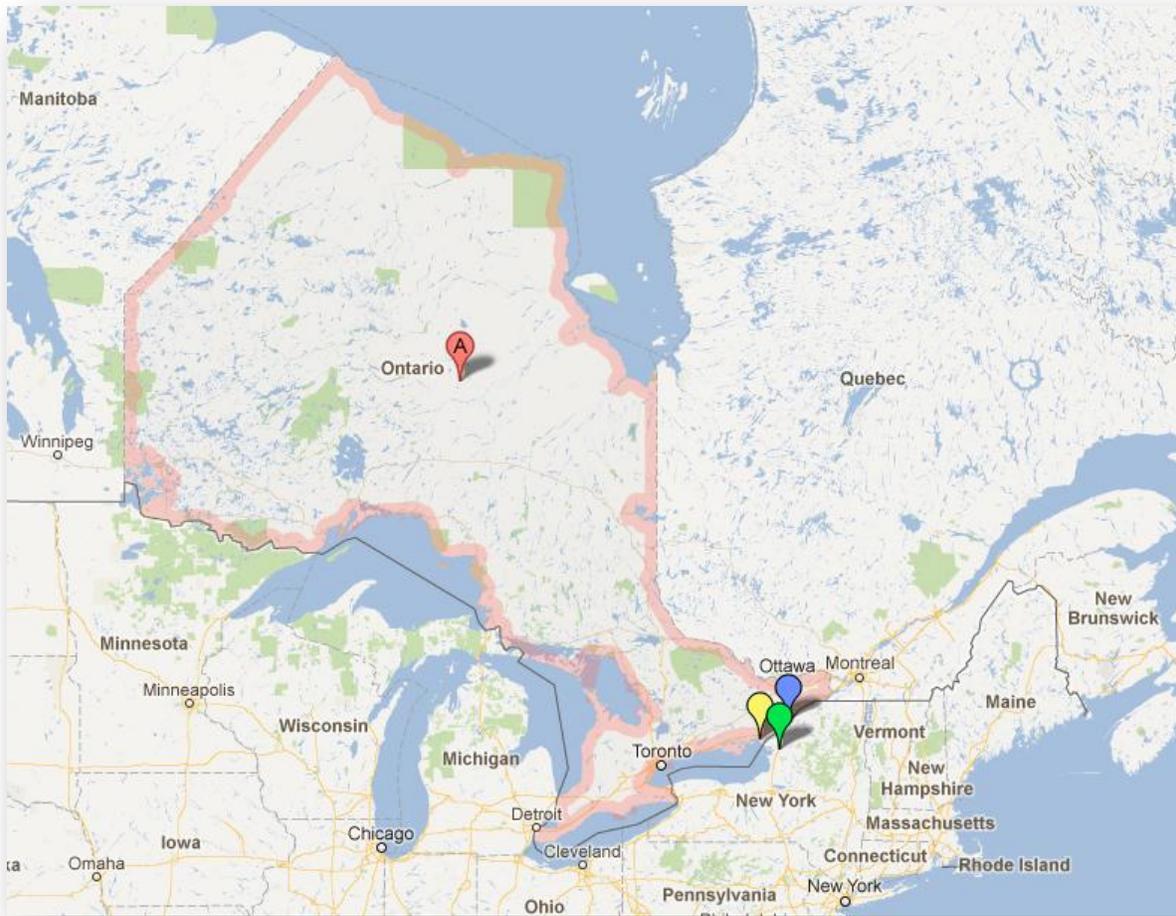
Recently, the Canadian government placed a larger emphasis on innovation, science and technology as a way to keep the economy growing and to drive economic development. A recent initiative by the Canadian government called *Advantage Canada* outlines the Country's goal to innovate new solutions to environmental health and other social challenges as a way to continue to improve their global competitiveness¹³. These are also important goals for Jefferson County, New York State, and the United States, and they present opportunities for partnership. The strengths of Ontario Province fit nicely with the strengths of Jefferson County and cross-border work could be possible through strategic networks and willing partners.

The map below shows the province of Ontario (outlined in pink), Kingston, Canada (yellow pin), Brockville, Canada (blue pin) and Watertown, New York (green pin). The nearby cities of Kingston and Brockville were selected as an example of nearby industry strengths and to identify any potential areas where investment in the United States may be possible.

¹¹ At the time of this 2012 writing, in a move toward administrative and operational efficiency, the JCJDC was in the process of dissolving and the JCIDA was taking over its economic development marketing and BRE functions.

¹² Note that that the data available for Canada is different than that available for the United States, but some conclusions can still be drawn regarding recommendations and opportunities.

¹³ <http://www.tradecommissioner.gc.ca/eng/science/strategies.jsp>



Kingston and Brockville are cities within the province of Ontario, located along the St. Lawrence Seaway. Kingston has a population of approximately 117,000, is the county seat for Frontenac County, and is approximately 80 minutes from Watertown. Brockville is much smaller with only 39,000 residents; this is the county seat of Leeds and Grenville United Counties and is approximately 70 minutes from Watertown.

General Characteristics		
	Population	Median Age
Ontario, Canada	12,160,285	39.4
Kingston, Ontario, Canada	117,207	40.0
Brockville, Ontario, Canada	39,668	43.8

Source: Statistics Canada, 2006 Census of Population

Ontario’s Competitive Industries

In the Economic Data Analysis conducted for this 2012 CEDS Update (see Section IV), several of Jefferson County’s strongest performing industries were identified (i.e. “Key Industries”). Many of these industries closely align with the industries that Ontario, Canada is most competitive in, such as manufacturing, logistics, and healthcare. Ontario’s competitive industries are profiled below.

Food Product Manufacturing

Ontario has one of the largest food clusters in North America; their food processing sector accounts for over \$32 billion in annual sales. Eastern Ontario and both the City of Kingston and City of Brockville have

experienced growth in this industry. This region of Ontario is one of the lowest cost food processing jurisdictions in the G7 (according to the 2006 Competitive Alternatives study done by KPMG¹⁴). Eastern Ontario has a competitive advantage due to its proximity to major markets such as Toronto, Ottawa, Montreal, and the United States. Besides proximity to these major markets, the region's competitiveness is also derived from the following:

- Reliable infrastructure, services, and facilities (including utilities and adequate water and sewer capacity)
- Well-trained and motivated workforce with a relatively low turnover rate
- Affordable land prices and fully serviced business parks
- Rail and highway access for transportation and movement of goods
- Streamlined development process and support services that assist with business expansion and technical assistance
- Incentives for investors and eligible developments

Some of the firms in the food processing industry that are located in Eastern Ontario include:

- **Ross Nutritional Products:** employs 120 people in Brockville and produces Similac and Ensure products. Ross Nutritional Products is a division of the US company Abbott Laboratories.
- **Burnbrae Farms:** employs 450 people; sells eggs and egg products to many of the major grocery chains, food service operations and large bakery customers throughout Canada.
- **Harvest Foodworks:** a growing company making freeze-dried and dehydrated meals, specifically formulated for outdoor enthusiasts.
- **Other international firms:** such as Pepsi, Quaker, Nestle, Parmalat, Hershey, Coca-Cola, General Mills, Kraft, Saputo and Casco.

Logistics and Distribution

Some of the characteristics that make Eastern Ontario strong in food product manufacturing (location to markets, transportation networks, workforce, and other factors) make the area strong in logistics and distribution as well. Approximately 5% of the residents work in the transportation and warehousing industry. The following firms have distribution centers in Eastern Ontario, some of which are US firms: Supply Chain Management (SCM-WalMart), Giant Tiger, Sears, Canadian Tire, Kraft Canada, Tim Hortons, Purolator Courier, Wills Transfer Ltd., All-Can Distribution Centres Ltd.

Healthcare

The healthcare industry in Eastern Ontario, particularly in the City of Kingston, is a major employer and catalyst for investment. Kingston is Southeastern Ontario's healthcare center and is home to top quality facilities, specialists, services, and researchers. The local hospitals partner with Queen's University and St. Lawrence College. The research occurring at the Kingston General Hospital has led to healthcare sector start ups, private research companies and innovation technology firms opening in the area.

Canadian Opportunities

Many of the locational strengths of Eastern Ontario are similar to those of Jefferson County, such as water access, rail transportation, access to major markets, and ground transportation networks. One aspect where Canada is more competitive than Jefferson County and New York State in general, is the provision of incentives for economic development. Here is an example of some of the incentives available to manufacturing firms looking to locate in Kingston:

- **Ontario's R&D Tax Credits:** Among the most generous in the G7, they can cut the cost of \$100 in R&D to less than \$41.

¹⁴ <http://www.brockville.com/economicdevelopment/index.cfm?ID=96>

- **Innovation Demonstration Fund (IDF):** The IDF is a discretionary, non-entitlement funding program administered by the Ministry of Research and Innovation that focuses on the commercialization and initial technical demonstration of globally competitive, innovative Green technologies, processes and/or products.
- **Scientific Research & Experimental Development Program (SR&ED):** The SR&ED program is a federal tax incentive program, administered by the Canada Revenue Agency (CRA) that encourages Canadian businesses of all sizes and in all sectors to conduct research and development (R&D) in Canada.
- **Eastern Ontario Development Fund:** \$80 million dollars available for business growth. Specific to Eastern Ontario, grants are available for up to 15% of eligible projects costs (up to \$1.5 million).
- **Prosperity Initiative:** Encourages businesses, not-for-profit organizations and post-secondary institutions in southern Ontario to undertake projects that will result in a more productive, diversified and competitive economy in the region.
- **Investing in Business Innovation:** Boosts private sector investment in start-up businesses to accelerate the development of new products, processes and practices and bring them to market. It also helps angel investor networks and their associations attract new investment and support the growth of angel investment funds.
- **Technology Development Program:** Provides financial support to encourage research and innovation organizations, the private sector, post-secondary institutions and not-for-profit organizations to work together to accelerate the development of large-scale, advanced technologies that will result in new market opportunities for southern Ontario businesses.

There does appear to be synergies between Eastern Ontario and Jefferson County in some of the targeted industries that are identified for this plan and the strengths of the Province. The following are some recommendations on capitalizing on proximity to Eastern, Ontario. Additional detail is provided in the Action Plan Matrix in Section VII and in the Action Plan Narrative in the Supplement Document.

- Work to build partnerships and help Canadian companies create secondary locations in the United States. There are certain benefits for Canadian firms to have a location in the United States and these should be marketed (Free Trade Zone, affordable land prices, access to water and sewer capacity, "Made in USA" brand, tax credits and incentives, and other benefits).
- Reach out to the food processing industry association in Eastern Ontario.
- Identify food processing firms in Canada and determine whether any of them are in need of significant dairy products.
- Continue to focus on technology and innovation advancement as a way to support advanced manufacturing, health care, and the food product manufacturing industry. Innovation in these processes and new tools for efficiency will make Jefferson County more attractive to potential investors, including Canadian investors.
- Partner with Eastern Ontario universities in advertising available positions.

Jefferson County economic development officials should continue to work to advertise and serve on boards where networks and relationships can be developed with officials in Ontario. Economic development is built on strong relationships and while they can be difficult and expensive to maintain at times, the payoff can be enormous when the relationships results in being the primary contact for a Canadian firm looking to get into US markets.

IV. ECONOMIC DATA ANALYSIS - OVERVIEW

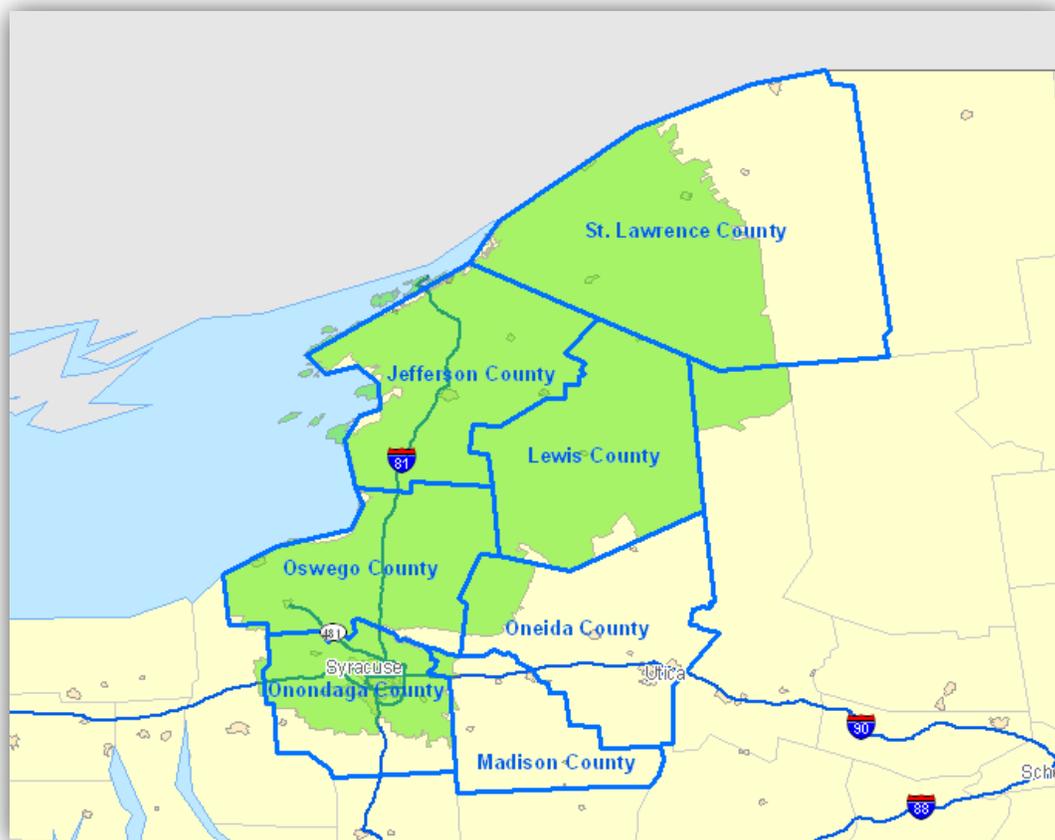
The economic data analysis begins with identifying existing conditions and recent trends within industry sectors that make up the local and regional economy. Industry trends in Jefferson County are compared to trends in the Jefferson County Economic Region and Upstate New York (both of which are defined below).

This section is a summary of the full data analysis conducted for Jefferson County's 2012 CEDS. In the narrative that follows, top industries and occupations for Jefferson County are identified and compared to the Economic Region study area and Upstate New York. The Supplement Document (addendum to this report) contains the complete economic data analysis, with full data tables that provide additional detail on the top industries and occupations in the County, Economic Region, and Upstate New York.

Economic Region Study Area

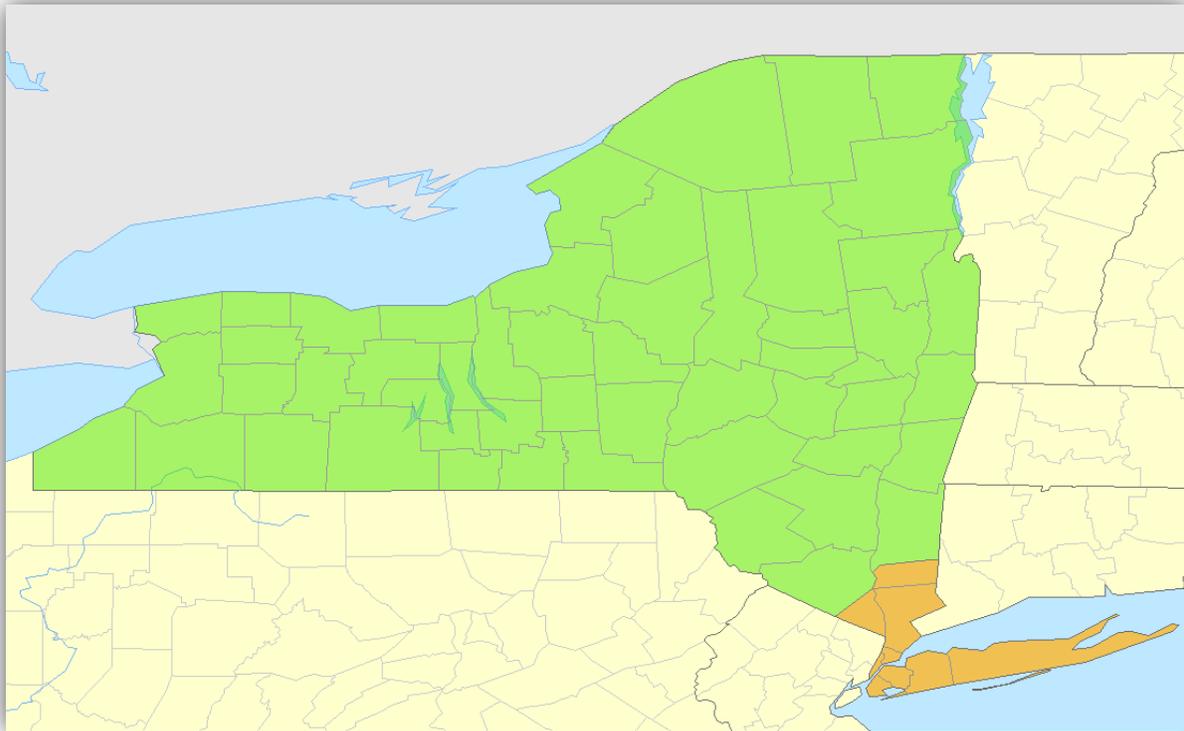
Camoin worked closely with the CEDS steering committee to delineate Jefferson County's Economic Region - the region to which much of Jefferson County's economic activity is closely tied in terms of supply chains, workforce travel, and other economic factors. Industrial/manufacturing/research related industries in Jefferson County tend to be closely tied to those in and around the Syracuse metropolitan statistical area whereas the County's agricultural/natural resource based industries are more closely tied to the adjacent more rural areas in Oswego, Lewis, and parts of St. Lawrence Counties. Therefore, as shown in green in the map below, the Economic Region's southern boundary is the middle of Onondaga County, capturing the Syracuse area, and its northern portion covers the western portion of St. Lawrence County.

Jefferson County's Economic Region Study Area



In addition to examining how the Jefferson County economy aligns with the regional economy, it is also important to understand how it fits in the statewide economy. For the state-level study area, Putnam, Rockland, and all counties to the south have been excluded to remove the weight of the New York City metro area, creating an “Upstate New York Study Area” (shown in green in the map below).

Upstate New York Study Area



Data Sources

Industry and occupation data used in this analysis is provided by EMSI (Economic Modeling Specialists, Inc.). 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 based on the latest available EMSI industry data combined with past trends in each industry, national growth rates of industries (Bureau of Labor Statistics), and data from the New York State Department of Labor. Projections provided in this report are informed guesses based on past and current trends. EMSI creates long-term, 10-year industry projections starting from the current year; 2012 for this particular report. Additional information about EMSI’s projections can be found in the CEDS Supplement section entitled “Additional Information & References”.

The data includes all employment covered by unemployment insurance. Unlike the decennial Census, QCEW measures jobs by place of work, not place of residence, and this is a strong measure of economic activity taking place in a particular region. Unlike most data sources, EMSI data includes Nonemployer Statistics, an annual series that provides sub-national economic data for businesses that have no paid employees and are subject to federal income tax.¹⁵ While some student workers, unpaid family workers,

¹⁵ <http://www.census.gov/econ/nonemployer/index.html>.

and some agricultural workers are excluded, EMSI is able to capture most all self employed workers and sole proprietors with no employees.

Understanding EMSI Data Pertaining to the Fort Drum Economy

Jefferson County's economy is heavily influenced by the presence of Fort Drum; therefore, Camoin Associates paid particular attention to how these military related industries were represented in the EMSI data. In the EMSI data, contractor employees are represented within NAICS codes specific to the industry they work in whereas employees of the federal government are all grouped into either the "government, military" or "government, non-military" industries. This makes it difficult to determine exactly how many jobs within a particular occupation are at the post. For example, the United States Army Medical Department Activity provides medical services to soldiers and their families on post. They staff approximately 645 military, civilian, and contract personnel. EMSI groups any physicians employed by a contractor in the health care sector whereas physicians employed as a civilian by the government are counted in the "government, non-military" industry and physicians employed by the army are counted under the "federal government, military" sector.

EMSI reports 17,074 jobs in the "government, military" sector in 2011, which is a difference of about 2,104 jobs when compared to the 2011 Economic Impact Analysis prepared by the Fort Drum Regional Liaison Organization. Based on this comparison, it is estimated that EMSI is under-representing the federal government, military employment by around 2,000 jobs; however, since this comparison is not of the same year, the actual discrepancy between the two datasets is unknown. Comparison of the "federal government, civilian" numbers is not possible since the civilian data includes both government and non-government employees working on the post.

It is important to keep in mind that the EMSI data is not incorrect; physicians employed by the federal government rightly belong to this industry sector just as a secretary employed by a telecommunications company belongs in the information industry sector. The reason for bringing this issue to the forefront is that when evaluating occupations, certain occupation categories are being slightly under represented because the "federal government, military" industry sector does not include a breakdown of occupations like the other industry sectors ("federal government, civilian" does contain a breakdown of occupations).

Presentation of the Data

Most of the data presented in this report are broken down into industry sectors, 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) system. 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. As mentioned above, the following is a brief summary of the data analysis; the full data analysis is provided in the CEDS Supplement.

Each section of the industry and occupational analysis includes a brief summary of the notable findings from the data, including a chart comparing the top five industries or occupations for that category in each of the three study areas. The chart is coded with green and blue shading to show where Jefferson County industries align with the top five industries in one (**blue**) or both (**green**) of the comparison geographies. The analysis of industries and occupations, combined with information obtained from the interviews, leads into the identification of top performing or "key" industries in the County, which are defined and discussed in the CEDS Supplement.

Industry Analysis

To get a general sense of the Jefferson County economy as it compares to the Economic Region and Upstate New York, we begin the industry analysis at the 2-digit NAICS code level. This is the broadest level of detail at which industry employment data is available and it includes general broad-based industry categories such as wholesale trade or health care and social assistance.

Whereas the 2-digit analysis looks at the industries in larger groupings, the 4-digit analysis allows a deeper probe into the local and regional economies by examining industry subsectors. Within each 2-digit NAICS the industries are broken down into 3, 4, 5, and 6 digit groupings, getting more specific as the number of digits increases. Examples of 4-digit industry subsectors include general medical and surgical hospitals (NAICS 6221); department stores (NAICS 4521); warehousing and storage (NAICS 4931); and traveler accommodation (NAICS 7211).

As discussed in detail in the following section, the location of Fort Drum in Jefferson County makes the federal government the largest industry by employment. Additionally, as in many regions throughout the U.S., local government is also a top employer in the Jefferson County Economic Region and the Upstate New York region. To supplement the discussion of top industries and provide a thorough comparison, two top 5 summary charts are provided in most of the following sections; one of the top five industries overall and a second displaying the top five non-governmental industries.

Establishments by Industry

This first set of tables ranks 2-digit industries in Jefferson County and Upstate New York by the number of establishments within each industry.¹⁶ As shown, the industries with the greatest number of establishments includes agriculture, forestry, fishing, and hunting with approximately 940 establishments and the retail trade industry, with over 500 establishments. This is followed by accommodation and food services; construction; and health care and social assistance, which each have over 300 establishments. Overall there are almost 3,800 different establishments in Jefferson County.

As at the Regional scale, the retail trade industry contains the greatest number of establishments. Construction contains the second most number of establishments, followed by health care and social assistance. Other services and accommodation and food services industries round out the top five.

Top Five Industries by Number of Establishments (2-digit)

County		Upstate
1	Agriculture, Forestry, Fishing and Hunting	Retail Trade
2	Retail Trade	Construction
3	Accommodation and Food Services	Health Care and Social Assistance
4	Construction	Other Services (except Public Administration)
5	Health Care and Social Assistance	Accommodation and Food Services

The following data shows industries by number of establishments at the 4-digit NAICS level. As shown in the following chart, the top five industries by number of establishments in Jefferson County and Upstate

¹⁶ Note: Industry establishment information is not available for zip codes; therefore, this data is unattainable for the Jefferson County Economic Region.

New York at the 4-digit NAICS level are almost exactly the same sequentially, with the exception of limited service eating places and residential building construction.

Top Five Industries by Number of Establishments (4-digit)

	County	Upstate
1	Full-Service Restaurants	Full-Service Restaurants
2	Residential Building Construction	Limited-Service Eating Places
3	Limited-Service Eating Places	Residential Building Construction
4	Local government	Local government
5	Offices of Physicians	Offices of Physicians

Largest Industries

The following tables rank Jefferson County, its Economic Region, and Upstate New York industries by size (i.e. number of jobs) within each 2-digit NAICS code. The top five industries within each of these geographies are summarized in the chart below:

Top Five Largest Industries (2-digit)

	County	Region	Upstate
1	Government	Government	Government
2	Retail Trade	Health Care and Social Assistance	Health Care and Social Assistance
3	Health Care and Social Assistance	Retail Trade	Retail Trade
4	Accommodation and Food Services	Manufacturing	Manufacturing
5	Construction	Accommodation and Food Services	Accommodation and Food Services

Of note is that government is the largest industry for each of the study areas. In Jefferson County, this industry employs almost 40% of the workforce. This is largely due to the presence of Fort Drum and two state prisons in the County. Approximately 775 employees work at the State prisons (Watertown Correctional and Cape Vincent Correctional) and there are nearly 20,000 federal government-military employees in the County. In the Economic Region and Upstate New York, the government industry makes up roughly 19% and 16% of the workforce respectively.

At the regional and state level, health care and social assistance ranks second, followed by retail trade; however, at the county level retail trade takes the second spot. Jefferson County’s manufacturing industry is about 3.6% of the workforce, whereas at the regional level this industry employs about 6.5% of the workforce.

At the 4-digit level, the largest industries in Jefferson County are overwhelmingly government-related industries; including federal government, military (20,000 jobs); local government (6,600 jobs); and federal government, civilian (3,000 jobs). Local government is one of the top employers for all three geographies.

Top Five Largest Industries (4-digit)

	County	Region	Upstate
1	Federal government, military	Local government	Local government
2	Local government	Federal government, military	State government
3	Federal government, civilian, except postal service	State government	General Medical and Surgical Hospitals
4	General Medical and Surgical Hospitals	Colleges, Universities, and Professional Schools	Colleges, Universities, and Professional Schools
5	Full-Service Restaurants	Full-Service Restaurants	Full-Service Restaurants

The following chart summarizes the top five non-governmental industries by 2011 employment. The top three industries in Jefferson County - general medical and surgical hospitals (1,900 jobs); full-service restaurants (1,800 jobs); and limited-service eating places (1,600 jobs) - are also within the top five largest industries in both the Economic Region and Upstate New York.

Rounding out the top five largest industries in the County are crop and animal production and offices of physicians. At the state level, other top industries include colleges, universities, and professional schools and grocery stores.

Top Five Non-Governmental Industries (4-digit)

	County	Region	Upstate
1	General Medical and Surgical Hospitals	Colleges, Universities, and Professional Schools	General Medical and Surgical Hospitals
2	Full-Service Restaurants	Full-Service Restaurants	Colleges, Universities, and Professional Schools
3	Limited-Service Eating Places	General Medical and Surgical Hospitals	Full-Service Restaurants
4	Crop and animal production	Limited-Service Eating Places	Limited-Service Eating Places
5	Offices of Physicians	Grocery Stores	Grocery Stores

Detailed information on the top 25 largest industries by employment and the percent of the workforce occupied by each industry sector for all three study areas is provided in the Supplement to this report.

Historic Growth

This section summarizes employment trends in each 2-digit industry over the past 10 years (2001-2011). The top five fastest-growing industries within each region and summarized in the following chart:

Top Five Fastest Growing Industries 2001-2011 (2-digit)

	County	Region	Upstate
1	Government	Health Care and Social Assistance	Health Care and Social Assistance
2	Health Care and Social Assistance	Government	Finance and Insurance
3	Administrative, Support & Waste Management	Administrative, Support & Waste Management	Real Estate and Rental and Leasing
4	Real Estate and Rental and Leasing	Professional, Scientific, and Technical Services	Professional, Scientific, and Technical Services
5	Construction	Finance and Insurance	Educational Services

In Jefferson County, government was the fastest-growing industry, growing by 28% and adding over 6,000 jobs since 2001. Health care and social assistance was the second fastest-growing industry, adding 1,400 jobs during this time period. In the Economic Region and Upstate New York, the health care and social assistance industry was the fastest-growing, increasing by 21% and 16% respectively.

Another important take-away from the data is the difference in growth between the three geographies. While the Economic Region and Upstate New York Region only grew 3% and 1% respectively, Jefferson County industries grew by 18%.

Overall, the industry at the 4-digit level that experienced the most growth over the last 10 years was federal government, military, which added over 5,800 jobs and grew by 52% in Jefferson County. This industry grew by 43% in the Economic Region and was not in the Top 25 in the Upstate New York region. This growth was directly related to the addition of troops to the Fort Drum post starting in 2005.

Top Five Fastest Growing Industries 2001-2011 (4-digit)

	County	Region	Upstate
1	Federal government, military	Federal government, military	Other Financial Investment Activities
2	Business Support Services	Other Financial Investment Activities	Colleges, Universities, and Professional Schools
3	Federal government, civilian, except postal service	Individual and Family Services	Offices of Real Estate Agents and Brokers
4	Individual and Family Services	Other General Merchandise Stores	Other General Merchandise Stores
5	Other General Merchandise Stores	Employment Services	Activities Related to Real Estate

Excluding the government-related industries, the fastest-growing industry in Jefferson County is business and support services. Digging deeper, there has been significant growth in several of this industry’s subsectors (such as office and administrative services, facilities support services, and employment services). However, over 90% of the job growth was in the telemarketing bureaus and other contract centers industry (NAICS 561422). This growth is the direct result of the attraction of

Stream Global Services to Watertown in 2003.¹⁷ In the region and upstate area it was around the 13-14th fastest-growing industry.

Top Five Fastest Growing Non-Governmental Industries 2001-2011 (4-digit)

	County	Region	Upstate
1	Business Support Services	Other Financial Investment Activities	Other Financial Investment Activities
2	Individual and Family Services	Individual and Family Services	Colleges, Universities, and Professional Schools
3	Other General Merchandise Stores	Other General Merchandise Stores	Offices of Real Estate Agents and Brokers
4	Offices of Real Estate Agents and Brokers	Employment Services	Other General Merchandise Stores
5	Full-Service Restaurants	Offices of Real Estate Agents and Brokers	Activities Related to Real Estate

Many industries in Jefferson County saw significant growth in the past ten years (2001-2011). The fastest-growing non-governmental industry by percent change was the second fastest-growing industry by number of jobs added: business support services, which went from 100 to 795 jobs, growing by 695%.

Projected Growth

Looking forward, 2-digit industrial growth in Jefferson County is expected to be more closely aligned to growth within the Economic Region and Upstate New York than in the past. This closer alignment is likely due to the fact that historically there was significant growth in the military occupations in Jefferson County, moving forward the industry growth will be in industries that are growing in other parts of the Region and Upstate as well. The top five fastest-growing industries from 2011 to 2021 are projected as follows:

Top Five Fastest Growing Industries 2011-2021 (2-digit)

	County	Region	Upstate
1	Health Care and Social Assistance	Health Care and Social Assistance	Health Care and Social Assistance
2	Government	Government	Real Estate and Rental and Leasing
3	Construction	Accommodation and Food Services	Professional, Scientific, and Technical Services
4	Real Estate and Rental and Leasing	Finance and Insurance	Finance and Insurance
5	Finance and Insurance	Professional, Scientific, and Technical Services	Government

Over the next 10 years, the fastest-growing industry in all three regions is expected to be health care and social assistance. At the County level, this industry is expected to add almost 1,500 jobs and grow by 20%. This industry is expected to grow by a relatively comparable percentage in both the Economic Region and Upstate New York.

¹⁷ Stream Global Services Website: <http://www.stream.com/locations/north-america/watertown.aspx>. Stream currently has about 350 employees working at its Watertown location and has capacity for 747 employees.

Although the EMSI model projects that government will add about 1,100 jobs (a 4% increase), EMSI makes projections based on past trends within the industry and regional economy. EMSI cannot predict local trends, such as the leveling off of expansions at Fort Drum. Therefore, based on our understanding of the local and regional economy, we expect the size of the government industry to either remain relatively stagnant or decline in the coming years. Please refer to the section “Future Jobs - Projections vs. Predictions” under “Additional Information & References” in the Supplement to this report. Finance and insurance also make the top five fastest-growing industries in all three regions. In Jefferson County, finance and insurance is projected to add almost 430 jobs (23% increase).

According to the EMSI data, the construction industry is projected to be the third fastest-growing industry in Jefferson County over the next ten years. However, it is also clear that the recent growth of the construction industry has been largely driven by construction at Fort Drum. According to local stakeholders interviewed for this project, construction activities at the post and post related construction in the community is actually expected to slow in the coming years. As such, it is expected that this industry will not grow as quickly as expressed in the table and may even experience negative growth.

The significant growth experienced by many industries over the last 10 years is projected to slow in the coming years. At the County level, federal government, civilian is projected to be the fastest-growing industry by adding over 700 jobs (23% growth). At the regional scale, local government is projected to be the fastest-growing industry by adding over 2,600 jobs (6% growth). As discussed earlier, the EMSI model is likely overstating the growth of government as it is based on past trends. Local and regional trends and events are not taken into consideration when making projections.

Top Five Fastest Growing Industries 2011-2021 (4-digit)

	County	Region	Upstate
1	Federal government, civilian, except postal service	Local government	Other Financial Investment Activities
2	Offices of Real Estate Agents and Brokers	Offices of Physicians	Offices of Real Estate Agents and Brokers
3	Other Financial Investment Activities	Other Financial Investment Activities	Offices of Physicians
4	Offices of Physicians	Nursing Care Facilities	Nursing Care Facilities
5	Individual and Family Services	Individual and Family Services	Individual and Family Services

When the government related industries are removed from consideration, there is even more correlation among projected 10-year growth within all three geographies. Significant growth is expected within various health care sectors. We note that one sector showing growth in the County but not the other regions is within the mental health facilities sector, which is driven by the presence of Fort Drum in the County.

Top Five Fastest Growing Non-Governmental Industries 2011-2021 (4-digit)

	County	Region	Upstate
1	Offices of Real Estate Agents and Brokers	Offices of Physicians	Other Financial Investment Activities
2	Other Financial Investment Activities	Other Financial Investment Activities	Offices of Real Estate Agents and Brokers
3	Offices of Physicians	Nursing Care Facilities	Offices of Physicians
4	Individual and Family Services	Individual and Family Services	Nursing Care Facilities
5	Residential Mental Retardation, Mental Health Facilities	Offices of Real Estate Agents and Brokers	Individual and Family Services

Location Quotient Analysis

A Location Quotient Analysis (LQ) is used to compare the size of an industry in one region to a larger reference region according to relative concentrations of employment in that industry. It is essentially a way of quantifying how concentrated a particular industry, demographic group, or other variable is in a region as compared to the state or nation. An LQ helps identify unique characteristics of a particular region. For this report, employment by industry within Jefferson County is compared to New York State and the U.S. to identify which industries might have a concentration in Jefferson County.¹⁸ A complete discussion and full data table containing the LQ analysis is provided in the CEDS Supplement. Jefferson County industries that are highly concentrated compared to the overall economy of New York State at the 2-digit level include:

- Agriculture, Forestry, Fishing & Hunting
- Government (also concentrated compared to the National economy)
- Mining, Quarrying, and Oil and Gas Extraction

At the 4-digit NAICS code level, each of the Top 25 industries has a significant LQ for both the state and national analysis. Therefore, when considering LQ's for particular industries, the approach taken for this LQ analysis is to identify those industries that consistently appeared at the top for size, past growth, and projected growth in the 4-digit industry analysis (provided in the CEDS Supplement). The following 4-digit industries were identified as top industries that are highly concentrated compared to New York State.

- Federal Government Military (also concentrated compared to the National economy)
- Soap, Cleaning Compound Manufacturing¹⁹
- Federal Government, Civilian (also concentrated compared to the National economy)
- Crop and Animal Production
- Other General Merchandise Stores
- Nonresidential Building Construction (also concentrated compared to the National economy)

¹⁸ For the State LQ analysis, Jefferson County industries are compared to the state as a whole, not the Upstate region study area defined elsewhere in this report.

¹⁹ Car-Freshener Corp is listed under this category

Occupational Analysis

Occupational data is helpful in evaluating how the skills, education, and certifications of residents match up with the area’s occupational needs of the future. In addition to looking at employment by industry, this section takes a look at employment by occupation. Occupations refer not to the product or service being provided, but to the defined set of tasks of the employee in question. To illustrate the difference, consider that the health care industry contains occupations such as doctors and nurses who provide health services to patients. However, the same industry also contains occupations such as management, real estate professionals, information technology professionals, human resource experts, janitors and cleaners, and clerical staff. The report identifies the top occupations and fastest-growing occupations within each community.

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), please refer to <http://www.bls.gov/soc/>. All occupation data for this report was collected from EMSI Complete Employment 2011.3.

Largest Occupations - All Occupations

The chart below summarizes the top five occupations in Jefferson County and the Region at the 5-digit SOC level. Military occupations are the top occupational category in both regions. In Jefferson County, almost 24% of the workforce is classified as a military occupation. Other top occupations listed make up much smaller components of the County’s workforce: retail sales persons consist of about 2.6%, child care workers are at about 2.3%, and janitors and cleaners make up about 1.2%.

Top Five Largest Occupations		
	County	Region
1	Military Occupations	Military Occupations
2	Retail salespersons	Cashiers, except gaming
3	Cashiers, except gaming	Retail salespersons
4	Child care workers	Janitors and cleaners
5	Janitors and cleaners	Registered nurses

Teaching is also an important occupational group in Jefferson County; however, the SOC classifies these occupations in such detail that they do not make the Top 25 at the 5-digit level. In total, the education, training, and library occupations category at the 2-digit SOC level includes over 3,220 jobs (the 5th largest group at the 2-digit level). The top five occupations at the 5-digit level include teachers assistants (621 jobs), elementary school teachers, except special education (522 jobs), teachers and instructors - all other (438 jobs), secondary school teachers, except special education and vocational education (394 jobs), and postsecondary teachers (383 jobs). These 3,220 jobs in the education, training, and library occupation classification make up about 5% of the workforce.

Historic Growth - All Occupations

From 2001 to 2011, the fastest-growing occupations were military occupations. In Jefferson County, the number of military occupations grew by 5,800 during this time period due to the addition of the 3rd Brigade and other elements at Fort Drum. This is a huge number compared to the second fastest-growing occupation, retail sales persons, which grew by almost 350 jobs in the County. Occupations that experience job growth from 2001 to 2011 in both the County and Economic Region include real estate sales agents and home health aides. It is also interesting to note that military occupations are number one for the Region as well as the County indicating how expansive Fort Drum is and what a large role it plays in the Regional economy beyond Jefferson County.

Top Five Fastest Growing Occupations 2001-2011		
	County	Region
1	Military Occupations	Military Occupations
2	Retail salespersons	Home health aides
3	Real estate sales agents	Personal financial advisors
4	Home health aides	Real estate sales agents
5	Customer service representatives	Child care workers

Projected Growth - All Occupations

As shown in the chart below, home health aides and child care workers are projected by EMSI to be among the top fastest-growing occupations in both the County and Economic Region, adding roughly 310 and 260 jobs respectively.

Top Five Fastest Growing Occupations 2011-2021		
	County	Region
1	Home health aides	Home health aides
2	Child care workers	Personal financial advisors
3	Real estate sales agents	Child care workers
4	Compliance officers, except agriculture, construction	Combined food prep. and serving workers, inc. fast food
5	Customer service representatives	Personal and home care aides

V. STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

SWOT Analysis

As part of the planning process, it is important to take stock of what types of strengths, weaknesses, opportunities, and threats exist within the community as a way to determine how best to either capitalize on opportunities or mitigate threats. Based on previous planning efforts, the economic data analysis, interviews with stakeholders, and knowledge of the community, the Comprehensive Economic Development Strategic Plan Committee developed the following list of strengths, weaknesses, opportunities, and threats (SWOT) in an effort to help guide the development of the Action Plan Matrix and 2012 CEDS Update. The following is a list of the items identified by the committee and other community stakeholders with a brief explanation of why they were included. Please note that this list does not indicate preference or importance, but is merely a list of the County's assets and issues.

Strengths

A strength is a characteristic of a community that gives it an advantage over others.

- Economic activity driven by Fort Drum – The existence of Fort Drum in Jefferson County has a massive impact on the local economy in terms of services, accommodations, business opportunities, and general economic activity. The soldiers and their families have discretionary funds that help support the local economy, particularly retailers (stores, food services, and accommodations).
- Historic and current strength in agriculture (particularly dairy farming) and good environmental conditions for agriculture – Jefferson County has long been a strong farming community with the right weather, soils, and support services for farmers.
- Legacy businesses providing stable jobs – There are a number of strong and stable manufacturing and production firms that have been in the County for decades. Some of these firms started out small but have been able to grow and now employ hundreds of people. These firms are unlikely to leave the County due to their ties to the community, but their importance should not be overlooked and business retention and expansion efforts should be employed to help them continue to succeed.
- Significant manufacturing and agricultural exports – Jefferson County continues to export significant amounts of goods. Exporting is important to local economies because it helps to grow wealth.
- Foreign Trade Zone designation – Firms that are involved with importing and exporting of goods find the Foreign Trade Zone designation to be very helpful to keep their costs low and allow them to compete on a global scale. The JCIDA has worked to expand the Foreign Trade Zone designation to include more property within the County, which will help attract the attention of companies looking to locate or expand in the region.
- Watertown is one of the few major population and service centers in the North Country – The Watertown area acts as the service center for much of the North Country and attracts people from a wide area (including Canada). Access to retail services, restaurants, health care services, and media outlets contributes to the quality of life for Jefferson County residents.

- Health care industry and health care service availability – Being the regional service provider for much of the North Country has helped Watertown and Jefferson County to develop a strong health care industry to provide services to residents. Furthermore, health care providers in the County serve Fort Drum which, unlike most other posts, does not have its own hospital.
- High standard of safety and general welfare in the County – The low crime rates are attractive to families (and potential business owners) looking to locate in the area.
- Relationships with higher education in the region – Although there is no four year college or university in the County, there are strong relationships between the local community college and other institutions in the larger region (Clarkson, Canton, and Potsdam to name a few). Numerous programs have been developed that connect Jefferson County residents and JCC students to the other colleges to assist them in achieving a four year degree or beyond.
- K-12 education system and high graduation rates – The County’s strong K-12 education system and high graduation rates are attractive to business owners looking to locate their business or prospective employees considering relocating their family to the area. It is also a positive asset for current residents and improves quality of life.
- Support of JCC by Jefferson County – Jefferson County supports SUNY Jefferson (the local community college) through both professional and financial support. The County provides a large portion of the Community College’s budget and is a strong advocate for the work done through its programs.
- Proximity to Canadian market and businesses – Being only 30 minutes from the Canadian border, Watertown is able to attract Canadian consumers to their retail stores. In addition to consumers, Jefferson County has the potential to attract Canadian businesses looking to open a US location. Furthermore, the Thousand Islands Bridge is reported to be easier to use (shorter lines, more convenient) than some of the other US-Canadian bridges.
- I-81 Corridor – This corridor connects Jefferson County to Canada to the north and down through Syracuse, Pennsylvania, to Washington, DC and beyond.
- Watertown International Airport Connection to Chicago – The airport provides daily service to Chicago’s international airport, which has proven to be beneficial to business and military travelers. Syracuse International Airport is also only one hour away and offers additional connections.
- Significant non-profit network and community support for organizations – There are many very committed people in the community that have been able to support and manage a strong non-profit network. These organizations assist those in need and help to support the community as a whole.
- Expansive scenic and outdoor recreation resources – The Thousand Islandd and Eastern Ontario region is a world class tourism destination. The County has significant outdoor activity opportunities including fishing, hunting, snowmobiling, boating, and others.
- Natural resource assets for energy including wind, water and biomass – The County’s many natural resources provide potential for a variety of alternative energy possibilities.

- Growing fiber optic coverage areas – The County has fiber optics infrastructure; high speed internet coverage throughout the County is growing.

Weaknesses

A weakness is a characteristic of a community that gives it a disadvantage compared to others.

- Risk of over-dependence on Fort Drum and government jobs – Approximately 30% of the jobs in the County are related to Fort Drum and/or federal, state or local government. While these are typically very stable jobs, recent economic strain has caused pressure to reduce employment at all levels of government, which could impact Jefferson County.
- Shifts in required skill sets pose a challenge for the local workforce – Developing the skill sets necessary in a changing economy could better position Jefferson County's competitiveness. In terms of population, the fact that Jefferson County and the region is so rural also leads to a smaller labor pool that makes it difficult for some employers to find workers with desired skills. Many young residents are going elsewhere for college and do not come back to the area since there is a lack of opportunity for them, perceived or actual, depending on their profession. This results in a labor pool that is less robust and skilled in technical areas than it could be.
- Lack of diversity in job options and low percentage of high wage private sector jobs – After government/military, the next largest percent of employment is in retail sales, accommodations and food services. These are good jobs but for certain segments of the population there are limited options for individuals looking to get into other industry sectors with potentially higher wages.
- Difficulty attracting employees – Some of the higher skilled industries are having difficulty attracting qualified employees to live in Jefferson County due to a real or perceived lack of opportunities and non-work related opportunities.
- Perceived lack of art/cultural resources to attract employees from out of area – Being a rural region, there is a perception of a lack of traditional arts or cultural resources available throughout the year. Many that are present tend to be seasonal. This has a potential negative impact on quality of life for residents and contributes to difficulty in attracting higher skilled employees, especially for positions that require a more creative role. Furthermore, limited arts and cultural resources hinder the tourism industry's market capture, although these community features are growing.
- Lack of access to capital for existing and start up business – The tight financial markets locally and globally have had an impact on businesses in need of capital to start or expand. Lack of access to capital makes it difficult for owners to make investments in infrastructure, equipment and labor.
- High transportation costs for agricultural and manufacturing goods due to distance from markets – Jefferson County is not located in close proximity to the major markets. It is hours away from New York City, Boston, and Hartford and is not as centrally located as some of the mid-west distribution centers. The County's location will restrict it from being a major national distribution or logistics center for solely U.S. based activity.
- Distance from USDA meat processing facility – The nearest processing facility is two hours away.

- Lack of production job training programs – As throughout the nation, manufacturing and production firms have found it difficult to attract, hire, and retain skilled labor that is able to succeed in the production industries. Also, programs to teach these skill sets are typically more expensive than other programs to offer at the community college level.
- Low pay in some manufacturing firms makes it difficult to retain quality employees – Some manufacturing firms pay such low wages in an effort to be competitive that they are finding it difficult to retain employees. This lowers the area's quality of life and economic potential.
- Limited tourism infrastructure and a primarily two season tourism economy – Jefferson County has been working to increase its tourism attractions and appeal but dated tourism infrastructure (such as higher end hotels, restaurants, and trail systems) and a limited season has made it difficult to expand the industry.
- Resistance to regional tourism initiative – The State is attempting to market the entire region as the Thousand Islands region but there are other parts of the County that are geographically distinct (Tug Hill Plateau, for example) and have been resistant to working with the larger region on tourism initiatives.
- Lack of investment in biomass and other alternative energy – With the high cost of energy, it is important that Jefferson County consider alternative energy sources as viable alternatives for industries and residents. Increased investment is necessary to fully realize the potential for these sources. Beyond research into these options, there is also need to improve the electrical grid infrastructure to be able to distribute the energy once available.
- High cost of energy – The cost of energy is a major concern for many industries as it is a large part of their operational costs. The Cost of Living index presented earlier in this document demonstrates the high cost of utilities/energy for the Watertown area as compared to similar regions.
- Lack of good quality and affordable housing units – Demand for housing generated by Fort Drum has created a housing market in Watertown and Jefferson County that is unique in the North Country. While many new units have been added, the high demand for rental units has created a situation where some landlords are under no pressure to make improvements to existing units.
- Fiber optics system – While fiber optics availability throughout the County is growing, the last mile of fiber optics is sometimes not available. In addition, full cellular coverage is not available throughout the County, which is unattractive to businesses and residents looking to locate in the region.
- Some negative perceptions of the County by residents – Some Jefferson County residents have a negative perception of the area which reduces the potential of the area to grow and improve.

Opportunities

An opportunity is where improvements can be made to attain a community's goal.

- Increase value-added agriculture (such as wine production, distilleries, and syrup), build on dairy product manufacturing (yogurt, cheese, and other products), increase commodity crop

production – The strength of agriculture in Jefferson County is a true asset and one that should be developed to encourage additional development and profit potential. For Jefferson County farmers, there are a few major opportunities including wineries, distilleries, and breweries as a way to attract tourists and sell products to a regional market. In addition, Jefferson County has a substantial supply of milk that can support the dairy product manufacturing industry and build on the regional strength of these products.

- Address cost of doing business for agriculture firms (regulations, taxes, and cost of energy) – The cost structure for agricultural industries is such that it becomes very expensive and time intensive to conduct business, making them less profitable and more likely to be unsuccessful. By addressing some of the costs to farmers that Jefferson County has some control over, it may be possible to make the area more attractive for additional agricultural investment.
- Grow targeted Health Information Technology (HIT) sector (workforce training, infrastructure, regulations, etc.) – Around the County, there has been increased attention towards the health information technology sector, which includes telemedicine, connectivity of regional providers, digital medical records keeping, and others. With the strength of the health care industry in the Watertown/Jefferson County region there is potential to expand this industry as long as the workforce exists. Jefferson County must continue to train a workforce to have the skills necessary to operate, maintain, expand and innovate around the health information technology industry. The focus on training must include partnerships with regional colleges, attracting people from outside the region, community college programs and on-the-job training.
- Bring manufacturing employment up to state levels – The current levels of manufacturing export are strong but, like many parts of the country, there has been a decline in the actual number of employees working at these businesses due to high productivity and increased automation. If Jefferson County can raise its LQ for manufacturing from 0.83 to meet the State levels of 1.0, that will help increase manufacturing exports and create job opportunities. This increase is a reasonable goal in terms of job creation in this industry as the area has the skills, infrastructure, and support to achieve this type of increase.
- Support Science, Technology, Engineering, and Manufacturing (STEM) industries – These highly technical industries are the future of job creation and innovation for most parts of the country. Jefferson County will be able to achieve its economic development goals by supporting those industries to be innovative and resourceful and create new processes for product development and communication. The County should support workforce training in these industries, establish public private partnerships and offer incentives to encourage innovation and advancement.
- Attract Canadian firms to the County and consider supply chain firms and other partnerships – Jefferson County's shared border with Ontario and its direct access to the Thousand Islands Bridge makes it reasonable to attempt to attract additional Canadian firms to the County. These firms could include businesses looking to establish a US location, supply chain businesses for existing firms in the County, and/or partnerships between Canadian and US businesses.
- Conduct a feasibility analysis on alternative energy – The County has significant resources for alternative energy projects and a thorough review should be conducted to determine which will be the most effective in terms of price, distribution, cost of energy, sustainability, etc. Biomass is already being developed in relation to Fort Drum; this should be reviewed for its potential throughout the County since the resources exist and the Fort Drum plant could create the demand that will make it marketable for other suppliers.

- Improve/expand the North Country brand as it relates to agriculture and value-added food products – Initially focus on a regional area where the North Country is a known entity. Try to establish distribution to regional health food stores and market at farmers markets.
- Expand Business Retention and Expansion (BRE) efforts and establish an annual tracking system – With the significant legacy businesses that exist in Jefferson County, it is important to make sure that those businesses are finding what they need to be successful and continue to expand in the County.
- Assist small business owners in their efforts to expand – Small and mid-sized businesses are very important to local economies and they should continue to be assisted so that they can increase their job and investment numbers. Assistance can include financial, training, partnership development, and support services.
- Continue to identify and support entrepreneurs that live in Jefferson County – Local entrepreneurs have personal ties to the County and any new business endeavor they begin has the potential to create jobs for local residents. Support for entrepreneurs can include business services, assistance finding start up funds, market research and help developing networks. All of these things will help local entrepreneurs be more successful and increase their potential for profit.
- Develop a culture of entrepreneurship – In areas where there are only a few large employers, it is common that many young people do not think about becoming an entrepreneur but this can be changed through education and an overall support system for those that are taking risks to start their own business. This culture can be developed through programs for young people with ideas for businesses, business plan competitions, and publicity for entrepreneurs who are doing well.
- Bring back students that attend college out of the area – Many young people who grow up in Jefferson County attend college out of the area and do not return because they believe they would be unable to find jobs in the area. Being able to bring these young adults and families back to Jefferson County will reinvigorate the community and expand economic opportunities. This can only be done if there are more jobs for these families to contribute to a high quality of life.
- Expand and market “buy local” campaigns – In support of local agriculture, the County agricultural leaders should make sure that residents understand the importance of buying local fruits, vegetables, breads and meats.
- Improve tourism infrastructure – The County is in need of additional tourism infrastructure and upgrades to expand this industry and support the appeal of the County’s natural attractions. Additional indoor amenities would also help fill in the in-between seasons when outdoor recreation opportunities are limited.
- Seasonal residents (second home owners) looking to start their own business or work part time provide a new workforce – There are significant numbers of second home owners in Jefferson County who expect to spend more time in the County once they retire. These second home owners bring with them not only discretionary funds but also work experience. Some are interested in starting a new business or working from their home at their current job.

- An aging population – The changing demographics of the Region may create demand for different types of services in terms of health care and housing options.
- Expand industry services at the Watertown International Airport – Current services to Chicago O’Hare international airport are attracting a growing base of passengers but there is potential to expand services to other airports and increase economic activity surrounding the airport.

Threats

A threat is an external element that could pose challenges if not managed correctly.

- A decrease in the number of soldiers at Fort Drum and associated investments – If the number of soldiers and/or investment at the post were to decline significantly, Jefferson County would find itself struggling to replace the economic activity driven by the post.
- National fixed pricing on milk creating disincentive for investment – The current price structure for dairy products is not based on actual market conditions (i.e. supply and demand). Even with the increased demand for dairy products in the region, local farmers are unable to raise prices accordingly.
- Lack of financial resources from state/federal level for economic development projects – Some financial assistance programs that businesses and communities have come to rely on are being cut as a way to balance State and Federal budgets. This has led to cuts in workforce training funds, business assistance funds and tax incentive programs that are attractive to businesses. Continued decline in funding for these programs will make it more difficult to encourage economic development in New York State.
- Poor national and state economic climate (i.e. slow growth) – The overall national and state economic climate has been slow to recover following the Great Recession of 2009. Businesses have been slow to get back to their pre-Recession levels, which has led to increased unemployment and decreased economic activity throughout all sectors of the economy.
- Lack of support for the agricultural economy from the state and federal government – Assistance programs are more heavily geared towards science technology and manufacturing industries; there is less assistance available for agricultural economies similar to Jefferson County.
- Continued tight financial market and loss of local lending sources – Following the Great Recession, lending markets tightened up and have not yet fully rebounded making it difficult for businesses to get financing for investments from some sources.
- Fluctuation in the number of soldiers and their families – The nature of deployments at Fort Drum creates a situation where there can be significant fluctuations in County population from one year to the next. This has an impact on the housing and retail market and on the ability for businesses to plan for the future.
- Perception of the area persists or worsens – Some employers have found it difficult to attract and grow the local labor pool because some prospective employees profess they do not find living in Jefferson County attractive and, therefore, do not take jobs (or come only for a little

while and then leave). This difficulty in attracting and retaining employees has been seen especially in the health services industry.

- Unfavorable change in the Canadian conversion rate –If the conversion rate were to change and become less favorable for the Canadian consumer, then local retailers could experience a significant decline in sales.
- Changing work ethic – Some employers note that there is a difference in the work ethic of the younger generation; some tend to be less reliable and disciplined. This trend has been reported throughout the nation and has become a national struggle to correct and improve upon.
- Risk of the end of the “farming culture” – As farm owners in Jefferson County are getting older, they will soon be unable to manage the hard work of farming. With many children of farmers uninterested in continuing in the work, the local farming culture is at risk of losing its owners and workforce.
- Age of manufacturing workforce – A high percentage of the current manufacturing workforce is nearing retirement. This will pose a challenge to employers who are in need of certain skills that are not being taught to the younger generation. There is likely to be an increased demand for these manufacturing and production related skills in the next few years and there may be some limitations in filling these needs.
- Loss of businesses due to the perception of a high cost of operating in New York State (workers compensation, regulations, taxes, etc.) – The high cost of doing business in New York State (and Jefferson County) makes existing businesses a target for other states that are looking to attract new economic development. State leaders are working to change this perception and improve upon NY’s reputation.
- Degrading road infrastructure in rural areas of the County – Financial strains of many communities within Jefferson County has led to the degradation of some of the road infrastructure.
- Gentrification and development of the waterfront – The continued development of prime waterfront locations could hurt Jefferson County in the long run as this important asset of the County become less accessible.
- Gradual loss of open space and agricultural resources – As some family farms struggle, a number of operators are finding it to be financially beneficial to sell their land for development, which reduces the open space and agricultural land that plays a significant role in Jefferson County’s economy.
- Creation of a hospital at Fort Drum or expanded health services that are provided by the military – It is unique that the Fort does not have its own hospital and it has created a long term partnerships between health care providers in the community and Fort Drum. If the military decided to build its own hospital on the post, it would break those relationships and have a significant negative impact on local health care providers.
- Funding system for the Community Colleges – The State mandated system that outlines how community colleges are required to fund their programs makes it difficult to offer the more expensive, and yet highly demanded, technical programs. The nursing and health service

programs are typically much more expensive to run than other programs, but even with the demand for these courses, the college is unable to afford to offer more sections. This not only impacts the community college's bottom line, but creates a situation where the workforce is not being trained adequately.

- High levels of student debt after college – Many students are graduating from college with very high levels of debt, which is limiting the amount of discretionary funds and their ability to take jobs in Jefferson County that might not pay as much as other parts of the country.

VI. STRATEGIC INDUSTRIES

The following list of strategic industries was informed by the economic data, SWOT analysis, interviews, previous CEDS and planning documents, and historic information about Jefferson County. As most of these industries currently have some presence in Jefferson County, the idea is not necessarily to attract a brand new industry, but to support those that already exist and help foster additional economic development in their supporting industries. These are targeted industries which, if supported, could grow as important contributors to the County's economy over the next decade. The support needed from various organizations includes financial, business technical assistance, workforce development, quality of life improvements to retain employees, and networking support to help expand their markets. The CEDS' Action Plan Matrix (Section VII of this report) offers specific recommendations for each of the targeted industries.

Working within hopeful, yet realistic expectations of the potential for industry and economic growth in northern New York during this challenging economic environment, the following industries present opportunities for positive growth and wealth creation. The section below reviews each strategic industry in terms of the average income and educational requirements, opportunities for growth, constraints and challenges and how these industries can be supported to help foster economic growth.

Manufacturing

Manufacturing, and particularly advanced manufacturing, is a target for Jefferson County for a number of reasons, including historic strength, existing levels of export from manufacturing (wealth generation), wage potential, available space, and the ability to attract Canadian production firms. While it is true that the levels of manufacturing employment have decreased throughout the Country due to increased productivity and automation and the economic recession, manufacturing jobs are still an important part of the County's economy that should be targeted for support and attraction. Manufacturing firms today are much smaller, more nimble, and more innovative than the more traditional manufacturing companies of the last century.

A real strength in Jefferson County is the number of legacy businesses, such as Timeless Frames, that have grown from small start ups to large, successful and stable participants in the local economy. Some legacy firms started in Jefferson County because that is where the owner/founder was born or had family, rather than because of the County's unique assets or incentive programs. It is imperative that focus is placed on building those homegrown firms and entrepreneurs who are in the County for other reasons, but are interested in growing their idea for an innovative product or process. A recent example of a small manufacturing firm that has grown in Jefferson County is Current Applications which started with only 6 employees but now has 40.

The entrepreneurs and small manufacturing firms could build on the existing infrastructure and manufacturing presence, helping Jefferson County to build its manufacturing cluster which would, in turn, attract other production firms. Advantages gained from locating near other production firms include access to specialized workers, access to suppliers and customers, and also access to support firms with legal, management consulting and finance skills.

Innovation is a key piece of manufacturing and manufacturing firms are more likely to introduce new products and new production or business processes than non-manufacturing firms. Some highly innovative manufacturing industries include those related to computers, communications and pharmaceuticals. Additionally, innovation requires the technical and analytical skills of engineers. The Brookings Institute notes that "Manufacturing makes up about 11 percent of U.S. GDP, but accounts for

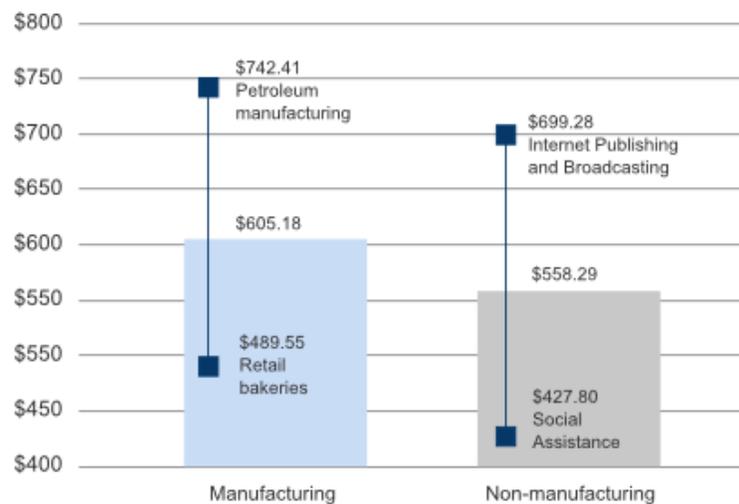
more than two-thirds (68 percent) of U.S. domestic company R&D spending—a key input to innovation.”²⁰

Beyond the innovation and technological advances that can come out of manufacturing firms, there is significant wealth creation from these firms as they tend to export their goods to other states and countries. In the past, many firms have “outsourced” or “off shored” their production to other countries, but the cost of production abroad has been rising, causing manufacturing firms to bring their production back to the United States. This trend, plus the demand by US consumers for products “Made in the USA”, have brought some manufacturing back to the US causing what some are calling to be a resurgence in manufacturing.

Income and Education

Jefferson County employees within the manufacturing industry earn approximately \$10,000 more per year than the average Jefferson County resident (average annual wage for those employed in Jefferson County is around \$45,000). The average annual salary for a manufacturing employee in Jefferson County is \$56,000 compared to \$73,000 per year nationally for a manufacturing employee. The following chart from the Brookings Institute illustrates that in general, manufacturing employees tend to make more than service employees (for example, in Jefferson County someone employed in the retail trade sector makes \$27,000 on average compared to \$56,000 in the manufacturing sector). The Brookings Institute goes on to say that the difference in income between manufacturing and the service sector is more prominent for low-wage workers, suggesting that manufacturing jobs could help lessen the income inequality at the lower income levels.²¹

Average weekly earnings in manufacturing and non-manufacturing, controlling for worker and job characteristics, 2008-2010



Education requirements for manufacturing jobs have been rising over the past decade as the work required has become more complex and technical. The increased productivity related to the higher levels of automation requires employees to be proficient in computers and have some technical skills to be able to operate the complex and expensive equipment. Most of the skills can be taught on-the-job as long as there is enough of a background knowledge level provided through high quality high school education.

²⁰ <http://www.brookings.edu/research/interactives/manufacturing-interactive>

²¹ <http://www.brookings.edu/research/interactives/manufacturing-interactive>

Opportunities

The County has existing strengths in goods manufacturing as compared to the state and national employment concentration. For example, the location quotient analysis identified railroad rolling stock manufacturing (NAICS 3365), rubber product manufacturing (NAICS 3262), and electrical equipment manufacturing (NAICS 3353) as having strength in the County. One way that the County economic development professionals should use this information is to work to identify and attract key supply chain businesses to the County to establish a location. Attracting the supply chain firms to the County would not only benefit the buyers and sellers but also increase employment opportunities and help support County manufacturing.

Another great opportunity is to continue to focus on increasing food product manufacturing activity. Access to raw materials and water/sewer capacity are two of the major requirements of food manufacturing firms and they are available in Jefferson County. Helping the County's farmers focus on adding value to their products by processing them for the end user will help farmers remain profitable and help generate wealth for the County. Specifically, attention should be paid to focusing on marketing and promoting local products to build regional and national recognition as an indicator of high quality unique products. The County has historic and current strength in dairy products (the County has a high location quotient for dairy product manufacturing) and should build on this strength as well as the regional cluster of dairy product manufacturers including yogurt producers and cheese manufacturing.

In addition to the dairy product manufacturing, another aspect of food product manufacturing that is gaining traction in Jefferson County and presents an opportunity for the future is the growth of grapes and hops for wine and beer production. Wineries throughout New York State have become significant drivers of tourism (wine trails and tours such as the Thousand Islands-Seaway Wine Trail) as well as a quality value-added product for farmers looking to increase their revenue. Jefferson County vineyards and wineries are able to offer a different product compared to other grape-producing areas of the State which could help drive tourism and improve the profitability of farms. Beyond vineyards, some farmers are also experimenting with hops for beer production. There are approximately 100 microbreweries in New York State that support the smaller hops growers that have sprung up in the last few years in a response to a hops shortage in 2007. Craft brewers and their consumers are increasingly interested and concerned with where the hops are coming from and are willing to pay a higher price for local, high quality hops that could be produced in Jefferson County. Hops are known to be difficult to grow (best grown in northern climates) and expensive to propagate and process. The Northeast Hop Alliance is a non-profit based in New York that is working to overcome some of the financial challenges and set up cooperatives between hops growers to reduce the cost and make the process more financially feasible.²²

A unique opportunity for Jefferson County in terms of manufacturing is to continue to attract Canadian firms to the County and also to expand export of Jefferson County goods to Canada. Jefferson County economic development professionals have been working diligently to market the County and build connections with Canadian partners. The County should continue to focus on the ease of access between the two countries over the Thousand Islands Bridge and the access to new markets when conducting marketing and promotion. One particular industry where there could be synergy between Ontario and Jefferson County is within the food product manufacturing cluster, which is a targeted industry cluster in both geographies. Identifying a food product manufacturing firm who may need access to US markets and substantial dairy assets could be attracted to Jefferson County to open a second location. For a more extensive discussion on potential synergies between Eastern Ontario and Jefferson County, see the "Canadian Investment" section of this report.

²² For more information about the Northeast Hop Alliance visit <http://nehopalliance.org/>

Increasing export potential is another opportunity for Jefferson County businesses. The 2010 Manufacturers Survey completed by the Jefferson County Job Development Corporation noted that currently 50% of manufacturers surveyed were exporting globally. Exporting goods brings wealth into the community.

Constraints

There are a number of constraints in the manufacturing sector in Jefferson County that is making growth challenging for existing firms and those that may be looking to enter the market. The primary constraint identified was the perceived cost of doing business in New York State and lack of support for business development. New York State's reputation for regulations and requirements puts Jefferson County in a position of having to be even more aggressive in putting together incentive packages to level the playing field with other competing locations. Communities throughout New York State must put together ever more complicated and expensive incentive packages to attract and retain employment by combining state grants with local tax incentives and workforce training assistance. Recent efforts at the State level have tried to improve upon the State's ability and capacity to do economic development in coordination with local leaders. While this issue of perception poses a difficulty in terms of attracting new firms to the area, it also makes it all the more important that the County focus on homegrown entrepreneurs, small business owners and existing firms.

Another constraint to manufacturing being faced across the country is the age of manufacturing workers and the lack of young people looking to get into production work. The Country is in a transitional period where the existing manufacturing workers are getting older but there are not nearly enough younger people with the skills needed to fill their positions. The State of the Workforce Study that was conducted in April of 2011 noted that 33% of the "employable"²³ residents of Jefferson County have skills in manufacturing. Of those with skills in manufacturing, 76% have supervisory skills, 76% have assembly skills, 68% have inspection and quality control skills and 66% have maintenance and equipment repair skills.

The location of Jefferson County is an opportunity in terms of proximity to Canada, but it is also a small constraint in terms of distribution of goods on a national scale. The cost of transportation by truck would be slightly higher in Jefferson County than it would be in other areas due to extra distance that needs to be traveled (extra time to get to I-90 and other major east-west connections), which makes it less attractive to potential firms. To logistics companies looking to distribute on a national scale, the extra time is money and they would likely look to locate in a place where they have easier/quicker access to national transportation veins.

Finally, while Fort Drum is a very strong and important part of the local economy, the ability for local manufacturers to get contracts with Fort Drum has been limited. The procurement and contracting process that the US military uses makes it difficult for local manufacturers to be selected. This creates separation where a partnership could exist. To help address this, the Greater Watertown Chamber of Commerce houses the Procurement Technical Assistance Center (PTAC). PTAC is geared towards helping businesses participate in the government contracting process.

Marketing

Different than in decades past, marketing efforts to build on the manufacturing base in Jefferson County should be more focused on existing residents (and their potential to innovate new products for production) and expansion/retention of existing firms. The County's resources would be better spent working to retain existing firms and help start ups than they would be trying to compete with the rest of the country for a brand new firm.

²³ "Employable" is defined in this study as either currently employed or planning to look to get a job within the next 12 months.

Assets that Jefferson County could use to attract manufacturing firms, particularly food product manufacturing, is the water and sewer capacity. Manufacturing firms need substantial amounts of water and sewer resources to make their products and keep their facilities running, and the County generally has the capacity to meet these requirements.

Other assets that are important to manufacturing firms include access to major markets (difficult to distribute nationally, but the County is within a day's drive of many of the world's largest markets), easy access to Canada, Foreign Trade Zone designation in a number of locations, access to services and quality of life attributes.

Tourism, Accommodation, Food Services, and Retail Trade

The Watertown area is known as a regional service center and retail destination serving residents of New York's North Country and southern Ontario, Canada. Retail stores in the County range from local mom-and-pop stores like The Mustard Seed to major national chains such as Gander Mountain and Old Navy. Similarly the accommodation offerings in Jefferson County range from local boutique hotels such as the Edgewood Resort in Alexandria Bay to flagship hotel brands. Growth in retail stores, restaurants and hotels in the Watertown area has been strong and is likely to remain stable as long as 1) the number of soldiers stationed at Fort Drum remains at current levels, 2) Canadian visitation levels continues, and 3) the national economic climate begins to recover from the Great Recession of 2009. Tourism, accommodation, food services, and retail trade all offer a variety of entry level jobs that play an important role in meeting the needs of residents of Jefferson County.

Income and Education

Jobs in the tourism, accommodation, food services, and retail trade industries are typically filled by residents without any higher education or during life changes and transitions. The jobs generally pay less compared to the County's average wage of \$45,500 per year. The median income for a person in a sales related job in Jefferson County is \$27,095 annually, compared to \$29,494 nationally. Most of the jobs in these industries do not require any higher education and employers provide on-the-job training. Some of the occupations (such as managers, supervisors, executives, and technicians) do require previous experience if not higher education in related programs.

There are some occupations within the industry where employees can earn higher wages, such as in upscale restaurants and hotels where employees are expected to have some previous experience and be able to provide top quality service. Top sales and service employees at these establishments can improve their standard of living through higher base pay and larger tips.

Additional information on hospitality industry occupations can be found in the Career Pathways section of the CEDS Supplement document.

Opportunities

Retail and service sector industries are important to the Watertown and Jefferson County area. The interviews and research suggest that there could be some potential for additional accommodation facilities (hotels, motels, B&B's), or upgrades of existing facilities in areas outside of the City of Watertown to serve visitors and tourists who are looking to spend time in the County.

In addition, the County should continue to market the area as an international retail and tourism destination to attract more Canadian residents. The Canadian border crossing at the Thousand Islands is a relatively efficient crossing (compared to other border crossings in New York), which makes it possible for international visitors to come to Watertown for a day of shopping and dining and then return home that same evening. This is a market that few communities have, and Watertown/Jefferson County should make sure they are capturing as much of the international consumer spending as possible.

This grouping of industries also relates to the tourism industry and efforts to grow the tourism economy throughout the County. The County has significant recreational resources for outdoor activities like hunting, fishing, hiking, ATVing, snowmobiling, and boating. Opportunities exist to continue to grow these resources and increase the impact that they will have on the County.

Constraints

Tourism, accommodation, retail and restaurant services are highly dependent on the national, state and local economy. With low levels of consumer confidence ratings and the overall state of the economy, retail sales have been experiencing a slow period nationally. With such a high concentration of county employment in the services sector, a decline in retail sales could create a downward spiral scenario where there is continued loss of wealth.

Another constraint for this industry are the fluctuations of the number of people stationed at the Fort. The larger deployments create a situation where it is difficult for some stores and restaurants to plan for the future. The shifts in population are difficult on many of the smaller local stores since they find themselves with a loss in sales and are unable to stay profitable during the times when a large portion of the soldiers are deployed. Fortunately, the length and frequency of deployments is expected to moderate in the near future.

Marketing

The Watertown area has recently grown a retail cluster driven by consumer demands of the Fort Drum population. Watertown's retail cluster also attracts consumers from across the region and Canada. Watertown is already "on the radar" of retail businesses looking for new markets to expand into (this refers to marketing to attract new businesses, not to attract more customers to existing businesses).

In their efforts to attract new tourism related businesses, Jefferson County should market the large populations that are within driving distance, access to Canadian visitors, and the wide variety of natural resources. Jefferson County should focus attraction efforts on businesses that benefit from natural resources and those that would enhance the County's recreational assets to continue to meet the needs of current and future visitors and residents who appreciate Jefferson County for those amenities. New businesses may be attracted to the current flow of visitors to the area and the potential for that number to grow with the growth of the tourism industry. If possible, the County should identify and attract tourism related businesses that would be able to extend the tourism season beyond current peak months.

Agriculture

The agriculture industry is a target for Jefferson County due to its historic and continued importance to the regional economy. The large cluster of dairy farming in Jefferson County has attracted dairy product manufacturing firms to the County, for example Great Lakes Cheese in Adams. The dairy industry plays a large role in the overall culture of the area. Increased conglomeration, modernization and automation in farming throughout the country has negatively impacted the local, smaller farms in terms of making it difficult to compete on price and essentially making it even more difficult to remain profitable. These changes have led to the loss of many family farms. However, there are still a significant number of local farms and agricultural exports from the County. The JCIDA's agriculture division plays an important part in supporting local farmers to meet the challenges of production and marketing.

One change in the agriculture industry in Jefferson County is an increased number of farmers and entrepreneurs establishing wineries, distilleries, and breweries. More farmers are moving towards growing specialized crops (such as grapes and hops) and making and selling their own value-added end products. The Thousand Islands-Seaway Wine Trail has been established; five wineries, one grape nursery, and nineteen vineyards that are involved with the wine business in the region. This is a new

branch of the agriculture industry for Jefferson County that is at the intersection of tourism and agriculture. New York State has been supporting the growth of wineries and breweries throughout New York State with specific policies supporting these industries and helping them to become established and grow.

Income and Education

In terms of average income for employees of the agriculture industry, typical wages in Jefferson County are around \$20,000 (significantly lower than the average wages for the County), compared to \$26,000 nationally. Occupations within the agriculture industry vary in terms of educational requirements including entry level jobs with no requirements all the way up to those requiring specialty degrees. Just like any science based business, business leaders must have the requisite skills including the technical/science skills and the business skills in order to run a successful operation. While education is less important for the laborers, those with a higher levels of education will have a better opportunity to move up within the organization.

The State of the Workforce study reports that approximately 28% of Jefferson County residents have skills in agriculture. Of those with skills in agriculture in Jefferson and Lewis County, 68% of residents have vegetable, fruit or grain production skills, 67% have livestock and poultry care skills, and 54% have skills in farm equipment maintenance or sales. The report indicates that Jefferson County residents are more likely to have vegetable, fruit or grain production skills compared to Lewis County residents who are more likely to have skills in maple syrup, sugar or honey production.

Opportunities

On a national level there has been renewed interest in eating local foods and consuming organic products, which has had a positive impact on local farmers. Residents are becoming more invested in where their food comes from and there have been increases in the numbers of farmers markets, farm stands, and community supported agriculture (CSA) programs. Jefferson County is within a day's driving distance of some of the world's largest markets where "grown in New York State" is becoming a very important brand for restaurateurs and consumers.

In addition to marketing the dairy, beef products, produce, and raw materials from Jefferson County, there is an opportunity to explore the potential for more value-added products. Many in the industry are starting to turn to value-added manufacturing and working with processing facilities to create a unique and specialized product that can be sold at a higher retail value. These value-added products include everything from wine and beer to syrup and yogurt. The manufacturing section of this report discusses further the potential for hops and grapes as inputs for value-added food product manufacturing.

A final opportunity for the agriculture industry in Jefferson County is to cultivate crops needed for the biomass industry. The Re-Energy project underway at Fort Drum will create significant demand for biomass material. The increased demand for the biomass inputs (switchgrass, willow, and other crops) would create a need for increased crop production and benefit the local farmers that could develop a stable and predictable customer base.

Constraints

The most substantial, and unfortunately uncontrollable, constraint for the dairy farming industry is the national milk pricing structure, which sets the price of milk in a way that is unrelated to the actual supply and demand at the regional scale. The way milk is priced makes it very difficult for Jefferson County farmers to capitalize on regional demand opportunities. Just like many other industries in Jefferson County, the cost of doing business in the agriculture industry is very high, particularly due to strict environmental regulations and reporting requirements.

Another major constraint for the agriculture industry is the distance to major markets and the ability to transport goods on a national scale. Jefferson County is positioned in a way that producers can market and transport within the region reasonably well, but cannot compete with Midwest farmers who have access to major transportation corridors across the nation.

Marketing

The County should continue to support value-added agriculture that will sustain both the agriculture industry and the manufacturing industry (and related sectors). This will likely be a homegrown effort by encouraging young people to get into farming, helping family farms remain profitable and supporting agriculture as an economic development tool. While there has been a resurgence of young people starting their own farms, the best use of County resources will be to focus on assisting existing businesses to move into new markets, find solutions to the cost of doing business and remain in business.

The County has significant resources to be able to assist existing and new farms including available land and classes to help train the necessary workforce (provided through Cornell Cooperative Extension). All of these are very important assets for the agriculture industry and should be used to help market the County.

Health Care and Social Assistance

The health care and social assistance industry is a target for a number of reasons including its historic strength in terms of employment and the demand for health services throughout the region. Major health care employers include the County's hospitals (such as Samaritan Medical Center), a variety of specialists, family practitioners, and other service providers. In addition to being a destination for retail and food services, Watertown is also known to be a regional center for health care services. Recent advancements in technology have introduced the region to telemedicine that provides specialty care for residents who need to see specialists that are not present within the region. Telemedicine has the potential to expand the health care offerings and improve resident access to services. Fort Drum does not have its own hospital and generates significant demand for health services not offered at the post. This has a positive impact for community health services and works to strengthen ties between the community and Fort Drum as the post relies heavily on the community to provide health care services.

The health care and social assistance industry is growing throughout the country as the population gets older and there is increased demand for health care. Additionally, Fort Drum generates demand for increased mental health services, physical therapy, occupational therapy, and other specialized services. Jefferson County currently does not have the level of specialized services necessary to meet all these needs, which is creating an opportunity to use telemedicine and also a need to attract more providers to the County.

The North Country Resource and Business Gap Analysis prepared by Economic Development Research Group, Inc identified medical and dental services a targeted industry for the North Country (and Jefferson County) due to demands from Fort Drum and the purchasing power generated by soldiers and their families.

Income and Education

Employees in the health care and social assistance industry earn wages that are comparable to the median income for the County. On average, those in this industry earn just under \$46,000 annually, compared to \$50,850 nationally. In terms of educational requirements, there is a wide range of requirements within this industry from short-term on-the-job training to doctoral degrees. A majority of the employees in this industry require some type of higher education. For other occupations like daycare workers, clerical assistants, and home health aides, on-the-job training is all that is typically

required. Additional information can be found in the “Career Pathways” section of the CEDS Supplement document.

Opportunities

The health care and social assistance industry is changing and Jefferson County has the ability to capitalize on these changes to provide jobs and improved care for residents. Significant changes are occurring in the field of electronic medical records and telemedicine. Local employers have already started to adopt some of these new technologies, which could improve the level of care being provided by increasing access to information, sharing documents, and working with regional partners on diagnosis and evaluations. There is obvious demand for certain health care occupations such as certified nurses, technicians and specialists that could create direct and indirect employment throughout the County.

Fort Drum creates a larger demand pool for more specialized care such as specialized mental health providers, counselors and rehabilitation professionals. These are very unique challenges that soldiers and their families face and having the services to meet these challenges will improve the quality of life and success of the soldiers following the end of their military service.

Constraints

One of the primary constraints of the health care and social assistance industry is the small pool of qualified employees for certain health related professions. This lack of certain specialized skills in the County is caused by a number of factors. The first reason is that it is difficult to attract health care workers to the area due to the reality or perception of a lack of career advancement opportunities (both for the health care worker and for his/her spouse that may work in a different field). Trained health care workers can get a job almost anywhere they want and they can often make significantly more money in more urbanized areas, which makes rural areas less attractive, especially to recent graduates that have significant medical school debt. Many local residents interested in joining health care professions go elsewhere for college, get their degree and then do not return, leaving rural areas without enough health care providers.

Another factor that is leading to the low numbers of qualified nurses and health care providers is the high cost of running the education program at JCC. Due to the fixed pricing model community colleges must follow, the high cost of the health care programs makes it difficult for the community college to add additional sections and courses. Further exacerbating the problem, there is a lack of nursing instructors due to the higher pay they can receive working in a clinic vs. teaching. The North Country Resource and Business Gap Analysis report notes that “For many services, North Country economic development officials will have to work closely with existing medical groups to identify prospects. To attract others, you will have to convince local community colleges and BOCES to either start training the needed skill sets or at least have a syllabus prepared and ready to implement for a prospect”.²⁴

A final constraint related to the health care and social assistance industry has to do with the infrastructure for regional health networks and telemedicine (using video conferencing tools to provide Jefferson County residents with evaluations and diagnosis from specialists who are located across the country). A majority of the infrastructure does exist, but there is need for expanded broadband and networking access to connect all of the major and minor health care providers in the County so that they can share information and records more easily. In terms of telemedicine, a major constraint is the current payment and credential structure that is used in New York State (which varies from other states) and creates a challenge to using the technology more widely. This requirement makes credentialing and using the system more difficult for Jefferson County than it is in other states.

²⁴ North Country Resource and Business Gap Analysis, 2007, Prepared by Economic Development Research Group

Marketing

To continue to grow the health care and social assistance industry, health service providers will want to work to attract more qualified employees by marketing the ability to truly make a difference in the County. The key to growing the health care industry will be bringing back (or keeping) the younger population and attracting established professionals to open up new practices and join existing ones.

Another tool for marketing the area to health care and social assistance firms and employees is to highlight the soldier population and large market for the size of the community, the broadband and high speed internet infrastructure, and the quality of life for residents (good place to raise a family, safe community, and recreational resources).

Finally, continuing to grow the available health and technology related programs at JCC and with regional colleges could possibly lead to spin off companies and advancements for the health care industry. For example, JCC is working to get the funding to support a certificate program that will teach students how to manage the use of technology in health care such as electronic medical records management, regional networks and telemedicine. Having this program will encourage increased and improved use of the available technology and fiber networks and may help to attract related firms such as medical records management firms and information systems managers.

Information Technology

As more and more business is conducted over the internet and using technology, IT occupations are no longer relegated to just traditional IT industries and firms; IT occupations have found their way into almost every industry sector. There are Chief Technology Officers at many companies and some level of computer skill is a requirement for many jobs. Information technology is an important part of the County's economy as there is increased interest in telemedicine, health care related call centers and general innovation and advanced manufacturing.

Income and education

The median income for Jefferson County employees within the information industry sector is \$40,000 a year on average, compared to \$81,000 nationally. In terms of educational requirements, those in information industry occupations typically have a Bachelor's degree and some on-the-job training. Additional information can be found in the "Career Pathways" section of the CEDS Supplement document.

Opportunities

Information technology occupations are growing throughout the country. In particular, the County should focus on the intersection of health care and information technology as there is increased interest in electronic medical records, telemedicine, and regional networking of information and resources. There is virtually no limit to the benefit that combining health care in the County with improved telecommunications technology could create for County residents and regional providers. The benefit will come in the form of improved medical care, increased recognition as a center for health sciences, and increased job opportunities. Partnerships between major medical providers and health information vendors can be brokered to increase the use of technology throughout the field which may lead to spin off technology and start up firms.

Beyond just an opportunity to expand the use of information technology within the medical field and improve service provision, there will also be an opportunity for new jobs for people who know how to service the equipment. These jobs will require skilled labor which can be trained through local apprentice and internship programs. Finally, the skills to be able to build databases and manage websites and networks is essential to building an interconnected system in Jefferson County and an opportunity exists to increase those with network development and maintenance skills.

Constraints

The telecommunications infrastructure that is necessary to fully realize the potential for the information technology industry is not complete in Jefferson County. There are improvements being made to the broadband and fiber optics infrastructure, but there is a need to continue those improvements and continue the expansion into all areas of the County.

Another constraint to the information technology industry is the pool of skilled workers in Jefferson County to meet the needs of the IT industry as it grows. If the County is going to pursue the intersection of health care and information technology, there will need to be significant investment in training programs.

The State of the Workforce report showed that 88% of employable residents were able to use common software such as Word and Explorer. Only 22% have computer and software teaching and training, approximately 15% have database and website design and management skills and only 12% have network and LAN administration and maintenance skills.

Marketing

Marketing to attract information technology firms and related information industries will require the continued improvement of existing telecommunications infrastructure and educational programs. Information technology is an industry where person-to-person learning and information transfer is the most effective technique, so helping to showcase the available networks (and building on those networks) will make Jefferson County an attractive place to be. Many information technology firms and workers are involved in innovation and therefore being located near the community college and within close proximity to regional university centers will be attractive.

Call Centers and Back Office Support Operations (Finance, Real Estate and Insurance)

This grouping of industries is important to the County's economy because they provide the support for the larger legacy firms and industry sectors. Call centers are only a very small part of the County's current economy (there are currently approximately 550 employees at the Stream Global Services company located in Watertown), but the potential exists for growth in this segment to support not only existing firms but also to support the growing health care and social assistance industry. Back office support operation firms are the companies that make it possible for the larger firms to grow and be more efficient and are vital to emerging opportunities. Firms involved in support operations are typically flexible and able to meet the changing demands of the local economy.

Insurance carriers were identified as a targeted industry for growth as part of the North Country Resource and Business Gap Analysis conducted in 2007. The analysis determined that with the high numbers of insurance carriers in the northeast, some may need a small to medium-sized location in the North Country to serve the Fort Drum population and residents. Similar to the findings of the 2012 CEDS data collection, the gap analysis suggested that the County's economic development efforts "concentrate on back office, processing operations, especially in the medical, property and casualty and warranty areas. The expected influx of better educated, more experienced military spouses can be a selling point in recruiting these types of operations."²⁵

Income and Education

The average income for the finance & insurance, real estate rental and leasing sectors (average of the industries combined) is approximately \$25,000, compared to \$54,000 nationally for these industries. Income for employees in these industries is significantly lower than the County's average income of

²⁵ North Country Resource and Business Gap Analysis, 2007

approximately \$45,500 for all employees. Real estate and insurance agents and brokers require a post secondary vocational award in Jefferson County. Other occupations require additional training such as personal financial managers (Bachelor's degree).

Within the professional, scientific and technical services industry, the average income in Jefferson County is \$43,000, compared to \$71,000 nationally. Employees in this industry do require job experience and some higher education.

Employees of call centers typically receive an income of \$28,621 in Jefferson County compared to \$35,000 nationally for the same industry. The majority of call center employees only need a high school diploma or G.E.D. and some on-the-job training. Call center employees that are involved with the health care industry do require a bit more training to be able to manage health care service related questions. For example, medical records and health information technicians need an Associate's Degree and medical transcriptionists need postsecondary vocational training. Additional information can be found in the "Career Pathways" section of the CEDS Supplement document.

Opportunities

Call centers present an opportunity for Jefferson County to increase the number of job opportunities for local residents. Focusing on the strengths of the community and the growing health care and social assistance industry could make the County attractive to a potential call center operator with a focus on health issues and/or medical devices.

In terms of the back office support operations industry, these firms are looking to support existing businesses and therefore networking is important. The back office support operations will be able to work with existing businesses to make them more efficient and productive through technology and management process refinement to reduce the cost of doing business and make day-to-day operations more profitable.

Constraints

Since some back office support operations are small businesses, two major constraints related to the growth of firms in these industries include the lack of access to capital for small business start ups and a need for business training (bookkeeping, management, human resources, and others). To solve these problems, the Jefferson County IDA and the Small Business Development Center should continue to offer small business training programs and reach out to potential entrepreneurs interested in starting out on their own.

One constraint related to call centers is ensuring that the workforce exists to meet the demand. Most call centers are very large operations and therefore they need access to a large labor pool of trained and/or trainable employees to meet their various levels of customer service/technical service. The CEDS Committee will continue to make periodic updates to the plan to anticipate changes in the economic climate.

Marketing

There are a few important locational factors that are considered when firms are looking to open a call center and those include telecommunications infrastructure, access to a skilled workforce capable of filling the jobs, and affordable space. While Jefferson County needs to continue to expand the telecommunications infrastructure and improve the workforce to be able to meet the more highly technical skill set needs, it is currently able to market the availability of affordable space and the entry level workforce needs of the industry.

Working to attract a health care focused call center would build on two of the targeted industries (health care and information), but there would need to be a larger pool of qualified applicants to fill the call center positions and employees able to manage the technical side of the operation.

Finally, before working to attract any new call centers to the County, County economic development officials should work with Stream to ensure that their space and workforce needs are being met.

VII. STRATEGIC PROJECTS, PROGRAM AND ACTIVITIES

Vision for the Future

In the future, Jefferson County will be recognized for its innovative, entrepreneurial spirit and culture of creativity. Its residents will enjoy a high quality of life and ample employment opportunities. These positive aspects of the community will support the retention of youth and retired military personnel and lead to successful business attraction efforts.

The future Jefferson County will pride itself on its competitive, well-educated workforce. Collaborations between the County's secondary schools, BOCES, SUNY Jefferson Community College and its affiliates, and industry leaders will prepare students to succeed. The labor force will meet the demands of local employers, allowing firms to compete in the global economy.

In the coming years, Fort Drum will continue to be one of the largest employers in New York State, and serve as a foundation of the community, providing employment, business activity, and diversity. Jefferson County will lead the Northeast in the agricultural industry, support the growth of local manufacturing businesses, and will be known for its world-class tourism opportunities. Watertown will continue to serve as a regional service center for healthcare, finance, retail, and government services. The strength of the region's economy will be seen in the thriving local businesses that provide stable and well-paying jobs and in the increasing amount of international investment made in the County.

Action Plan Matrix

The following is a list of six goals and dozens of actions that have been carefully crafted to help Jefferson County meet its vision for the future. The strategic actions include tasks ranging from supporting existing efforts, establishing new programs, and capital projects that will encourage economic development. The Action Plan Matrix will help the County prioritize its economic development initiatives and provide direction for future efforts to help them meet their goals, which include:

- Develop the local workforce to meet 21st century challenges
- Cultivate a culture of entrepreneurship
- Develop first-class amenities to support growth (infrastructure, facilities and alternative energy)
- Improve business development communications, marketing and networking to enhance the economic climate
- Enhance quality of life advantages of the County to support local residents, workforce and to facilitate business investment
- Work to retain, attract and grow the following targeted industries within the County
 - ✓ Manufacturing
 - ✓ Tourism, Accommodation, Food Services, and Retail Trade
 - ✓ Agriculture
 - ✓ Health Care and Social Assistance
 - ✓ Information Technology
 - ✓ Call Centers, Back Office Support Industries (Finance, Real Estate, Insurance)

Each action includes a description, suggested lead agency or partnership, priority level, and time frame for completion. The suggested lead agency column indicates the agency or organization that the CEDS committee feels is best suited to take on the action item. Additional information, including performance measures and more detailed descriptions, are included in the Supplement document.

Goal: Develop the local workforce to meet 21st century challenges					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
A.1	Coordinate efforts between all educational providers to align workforce development with targeted industries	Based on a career pathways approach, develop curricula based on the skills needed for the targeted industries (from high school to community college). Continue to coordinate efforts with the regional four year colleges and universities to build on their strengths.	High schools, BOCES, and JCC	High	Ongoing
A.2	Create a Task Force to regularly bring together educators and employers to jointly address emerging workforce needs	Provide job information to guidance counselors, teachers, principals and employers about various career and education pathways for the target industries and other employment opportunities. Task Force will address technical and academic skill areas that are needed as well as soft skills for employees (attendance, reliability, etc). Work to solve disconnect between available jobs and workforce skills.	WIB, JCC, BOCES, and High schools	High	Short
A.3	Encourage internship and apprenticeship partner programs	In an effort to attract students from regional colleges and create lifelong residents, expand internship opportunities throughout the County and market to college department heads. Encourage greater participation by companies.	JCC, WIB, and Regional College Partners	High	Short
A.4	Support Science, Technology, Engineering, Math (STEM) training programs	Support existing STEM training efforts and increase where possible. For example, the National Science Foundation offers grants to community colleges and other institutions of higher learning to increase their ability to deliver education and career training.	JCC, North Country STEM Hub, WIB, and BOCES	High	Short
A.5	Continue the Jefferson Express Workshops	Pursue funding to continue the Jefferson Express Workshops offered by JCC to provide job training, skill building, and mobile technical assistance to rural parts of the County.	JCC	High	Ongoing
A.6	Create new and promote existing programs to assist in the transition from military to civilian life for retired military personnel	Focus on transitions into targeted industries, acquiring the skills necessary for the current economy, and how to start a business. Pursue additional Federal funds and programs to train and place veterans.	JCIDA, JCC, WIB, and FDRLO	High	Short

A.7	Develop employee training programs that are available for small employers and new start ups	Program to include training opportunities for technical skills, and various managerial and business skills. Create programs where multiple firms can send employees to improve enrollment rates and increase sustainability for providers.	BOCES and JCC	Medium	Mid
A.8	Develop and promote adequate community support services required for a strong workforce	Integrate service and resource information pertaining to child care, elder care, and transportation alternatives through outreach to local employers and employees. Service providers should increase availability, marketing, and promotion.	Transit Providers and Community Action Planning Council	Medium	Mid
A.9	Establish a connection with Canadian universities to advertise jobs	Establishing a partnership with Eastern Ontario higher education centers could broaden the labor pool and attract applicants for hard to fill job openings.	JCIDA	Medium	Short
A.10	Increase awareness of available higher education offerings and continue to increase program offerings	Implement a "lifelong learning" strategy whereby residents are aware of the many available programs through JCC. Recognize and encourage the various ways that residents can get their higher degrees.	JCC	Medium	Mid

Goal: Cultivate a culture of entrepreneurship

	Action/Objective	Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
B.1	Expand on existing support network for entrepreneurs and new businesses, designed to help them grow and compete successfully.	Recruit successful entrepreneurs and encourage and support them to start an informal peer network that brings together those with technical skills and business ideas. Develop a mentoring program for hands-on experiences for entrepreneurs.	Chamber of Commerce and SBDC	High	Mid
B.2	Continue to build on existing youth entrepreneurship programs	Expand on entrepreneurship opportunities such as the annual E-Day (Entrepreneur Day) competition which involves both high school and JCC students, and the Junior Leadership Institute.	Area School Districts and JCC	Medium	Mid

Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
B.3	Study the feasibility of establishing an entrepreneur incubator space	Fort Drum, JCC, and SBDC should evaluate the need for an incubator. Focus on making space available and also offering services and technical assistance for entrepreneurs looking to start a new business.	JCC, JCIDA, and SBDC	Medium	Mid
B.4	Improve access to capital for entrepreneurs	Establish or identify sources of a venture capital fund, angel investment, or other sources of equity investment available to local entrepreneurs. These may include public or private funds. Recapitalize the County's microenterprise RLF through alternative sources. Advertise existing sources of funds.	JCIDA	Medium	Short
B.5	Promote existing sources of capital and work to find new sources for entrepreneurs	Develop a more intensive mentoring program for small business owners that have been in business between one and two years and are in need of assistance to get from their original product idea to creating a more established business. Focus on production industries to expand markets and find growth potential. This should be a regional effort as that will increase available resources and bring more entrepreneurs together.	SBDC, JCIDA, and JCC	Medium	Long
B.6	Support existing small business assistance programs and transitional classes aimed at Fort Drum retirees and soldiers separating from service	Former soldiers and their families are often potential entrepreneurs that want to remain in the area and have skills to develop niche business endeavors. Target business support services to this population.	WIB and SBDC	Medium	Ongoing
B.7	Continue training opportunities through the SBDC	The SBDC offers counseling and training as a core service to budding entrepreneurs; it helps with business planning, financial management, and human resource issues. Present a curriculum based on "innovation engineering" as a way to increase internal innovation and product development as outlined by State Manufacturing Extension Partnerships.	SBDC and CITEC	Medium	Short

B.8	Connect with seasonal homeowners looking to start their own business	The recent TIITC survey of seasonal residents indicated 4.5% were interested in owning and/or operating a local business. Market local business opportunities and services to second homeowners interested in starting or relocating their own business to Jefferson County.	JCIDA, SBDC, and TIITC	Medium	Long
Goal: Develop first-class amenities to support growth (infrastructure, facilities and alternative energy)					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
C.1	Complete the Watertown International Airport development plan, addressing both future aviation and corporate park needs	The JCIDA is examining the feasibility of developing a new corporate park at the Watertown International Airport.	JCIDA and Jefferson County	High	Short
C.2	Analyze adaptive re-use opportunities for the Mercy Care Center health complex in downtown Watertown	With the anticipated closure of the Mercy Care Center facility, re-use options should be evaluated that complement the core downtown area.	City of Watertown and Watertown LDC	High	Short
C.3	Consider expansion of broadband access and "last mile" infrastructure	Leverage utilization of DANC's Open Area Telecomm Network and expand service capability and redundancy improvements through regional connections. Implement affordable "last mile" technology to ensure high speed broadband connectivity from business locations to main transmission lines.	DANC and FDRHPO	High	Short
C.4	Support biomass utilization and development	Biomass has been identified as a potential alternative energy source for the region because of its abundant farm and forest lands. Local stakeholders have been promoting interest in biomass utilization, and the biomass cogeneration project at Fort Drum should provide the critical mass demand for fuel to help make smaller scale biothermal projects a more viable alternative.	JCIDA	High	Mid

Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
C.5	Participate in planning for long term upgrades to County's electrical distribution and transmission infrastructure	As with many other areas, the County's electrical grid network is becoming dated and restricts transmission of certain locally generated energy sources. Also 3-phase power capability needs to be expanded to rural areas of the County.	National Grid, State, and Federal Gov't's	High	Long
C.6	Feasibility study on anaerobic digester	Major cost concerns for dairy farmers are environmental regulations regarding methane management and the cost of energy. An anaerobic digester system would turn the methane into energy that could potentially reduce the cost of doing business for the farmers. These types of efforts are occurring on a smaller scale, but consideration should be given to the potential for a larger scale effort.	JCIDA	Medium	Long
C.7	Participate in the North Country Regional Economic Development Council's Cleaner, Greener, Communities Sustainability Plan	Participation will enable access to future NY energy efficiency and project development funds for local businesses and organizations.	Jefferson County	Medium	Short
C.8	Support the development of appropriate alternative energy development production facilities utilizing hydro, wind, or solar power.	Advancements in run-of-river technologies may provide opportunities to further tap local hydropower potential. Local wind resources create the potential for on-site and commercial wind projects, where appropriate. Photovoltaic advances offer greater solar potential for public and private facilities.	JCIDA	Medium	Ongoing
C.9	Capital Project: Proceed with implementation of Watertown International Airport Master Plan for aviation improvements.	Continue incremental aviation infrastructure and equipment improvements to support and leverage additional commercial passenger and private aviation services.	Jefferson County	High	Long
C.10	Capital Project: Build out and market Watertown International Airport corporate park	Develop access, utility infrastructure, and shovel-ready sites to support establishment of a corporate park adjacent to the Watertown International Airport	Jefferson County and JCIDA	Medium	Mid

Goal: Improve business development communications, marketing and networking to enhance the economic climate					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
D.1	Enhance existing business retention and expansion efforts	Create a more formal evaluation of business needs (workforce, financial, space) and future plans. Particular attention should be paid to legacy businesses.	JCIDA	High	Ongoing
D.2	Continue participation in the "Drum Country Business" regional marketing effort	This partnership markets the collective assets of Jefferson, Lewis, & St. Lawrence County around the theme of their shared connection to Fort Drum and the economic opportunities related to post operations, post-related population growth, and associated workforce. Targeted industries include light manufacturing, food processing, renewable energy, and back office/call center operations.	JCIDA and partners	High	Ongoing
D.3	Public official economic development training and information	Conduct orientation for public officials on economic development practices and the nature of the competitive site selection process.	JCIDA and partners	High	Ongoing
D.4	Finalize Canadian Version of JCIDA Website	Finalize Canadian version of the JCIDA website, tailored to the needs and interests of Canadian businesses considering a US location, and hold a launch event.	JCIDA	High	Short
D.5	Develop updated marketing materials (including brochure) promoting Jefferson County as a desirable business location	An updated brochure that is consistent JCIDA's newly revamped website should highlight targeted industries and new information such as the availability of Foreign Trade Zone Benefits. Utilize a QR Code to direct people to the website. Develop fact sheets for each targeted sector and make them available on the website with links to information on workforce and regional assets. Update this information regularly.	JCIDA	Medium	Short
D.6	Analyze feasibility of a web-based Jefferson County Project Development Portal	Similar in nature to a recent Niagara County project, integrate information resources within a website portal to facilitate business and property development in the County.	JCIDA, County, and Municipalities	Medium	Mid

Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
D.7	Increase efforts to attract Canadian firms to the County	Continue to attend Canadian business events to identify and develop relationships with firms that may want/need to be in the US. Continue to be an active member of the Interactive Manufacturing Innovation Network (iMiN). Investigate opportunities to work cooperatively with the other North Country region counties to address common interests in Canadian business recruitment. Promote a user friendly "one stop shop" for Canadian businesses.	JCIDA, TIITC, and Capital Corridor	Medium	Mid
D.8	Facilitate cross-border business to business opportunities	Develop partnerships with the Canadian economic development professionals and organizations to create cross-border networking opportunities for US and Canadian businesses. Consider reaching out to the manufacturing industry and identifying possible expansion projects that would benefit from being in Jefferson County.	JCIDA, TIITC, and Capital Corridor	Medium	Ongoing
D.9	Continue implementation of growth management principles to maintain military and community land use compatibility	Follow FDRLO growth management plan recommendations to share information about development patterns and base activities to prevent encroachment concerns. Continue promotion of maps and planning guides to elevate awareness of potential encroachment conflicts.	County Planning Department, FDRLO, Municipalities, NYS Tug Hill Commission	Medium	Ongoing
D.10	Continue to promote the use of Watertown International Airport for passenger service	Passenger use has increased significantly since the introduction of American Eagle commercial jet service in late 2011. There continues to be opportunity for further local and regional promotion of the airport that could transition into additional flights and destinations at the airport. Consider potential for expanding Canadian market capture rate.	Chamber of Commerce, Jefferson County, and TIITC	Medium	Long

Goal: Enhance quality of life advantages of the County to support local residents, workforce and to facilitate business investment					
	Action/Objective	Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
E.1	Continue to support 'Buy Local' campaigns and farmers markets	Support the County's farmers, food product manufacturing industry, and residents by continuing to encourage customers to buy local and frequent farmers markets. Tangible efforts could include assisting farmers with signage for markets and stands.	JCIDA, Chambers of Commerce and CCE	High	Short
E.2	Continually evolve a County housing strategy to facilitate response to new unit demand and rehabilitation needs.	Pursue available financial tools, grants, and housing resources to assist development of new units to meet the County's unique housing demands. Perform periodic gap analyses to estimate unit shortfalls as the basis for local housing decision-making. Continue leveraging rehabilitation funding to further improve the viability County's existing housing stock.	DANC, FDRLO, County, and Local Municipalities	High	Medium
E.3	Continue reinvesting in downtowns, community centers and areas with infrastructure	Municipalities should undertake pre-development planning and apply for grants that will assist with downtown revitalization efforts. Sources should include the New York Main Street program, Community Development Block Grant program, United States Department of Agriculture Rural Business Enterprise Grants, and NYS CFA opportunities.	Municipalities, with assistance from County Planning Department, Regional Agencies, and downtown development organizations	Medium	Mid
E.4	Increase year round arts and cultural offerings	Work with community stakeholders to expand cultural and arts offerings to improve quality of life and tourism appeal. Particular attention should be paid to increasing options in the "shoulder" seasons.	North Country Arts Council and area Chambers of Commerce	Medium	Mid
E.5	Maintain regular communication between Fort Drum and the community.	Continue the liaison role of the FDRLO as the basis for two-way dialogue for partnering on military and community needs, opportunities and challenges.	FDRLO, AUSA, and FDRLO member organizations	Medium	Ongoing

E.6	Implement recommendations from Fort Drum Regional Transit Needs Assessment	The Regional Transit Needs Assessment calls for increased coordination to improve mobility and public transit alternatives to meet workforce commuting needs.	Transit Providers, City of Watertown, FDRLO Transit Group	Medium	Long
E.7	Improve government service delivery in key areas that affect business sustainability and growth prospects	Continue local government efficiency studies and implement recommendations that result in lower tax burdens.	Municipalities and School Boards	Medium	Ongoing
E.8	Capital Project: Upgrade Emergency Public Safety Radio System	Due to aging technology, interoperability improvements are needed to develop a multi-jurisdictional shared radio system.	Jefferson County	High	Short

Goal: Work to retain, attract and grow the County's targeted industries

Industry: Manufacturing

Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
F.1	Expand manufacturing collaboration initiatives	Manufacturing collaboratives are typically led by existing manufacturers within a region to leverage the resources and networks to support and grow the sector. Jefferson County's public/private manufacturing collaborative should advocate for and attempt to address workforce issues. The collaborative should include county economic development professionals, but should be primarily driven through a private effort.	JCIDA and WIB	High	Short
F.2	Develop appropriate youth workforce development programs	Work with local legacy manufacturing firms to determine their workforce needs and develop the appropriate school-based programs to address those needs. Educate students, parents, teachers and guidance counselors on the opportunities in production-related careers. Support funding for BOCES classes and encourage full enrollment to keep the classes going. Reach out to regional employers for financial assistance or partnerships.	BOCES, WIB, and school districts	High	Short

Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
F.3	Develop appropriate adult workforce development programs	Develop adult-oriented training and certification programs to help address the existing skills gap and challenge posed by an aging workforce.	BOCES, WIB, and school districts	High	Mid
F.4	Focus on targeted manufacturing supply industries	Hold a supplier conference to offer target industry suppliers a more in-depth look at County opportunities. Targeting these supply chains would not only increase job opportunities for County residents but would benefit existing manufacturers.	JCIDA	Medium	Mid
F.5	Attract dairy product manufacturing firms	Identify firms that need a location in NYS and bring them to Jefferson County to market and showcase the County's assets.	JCIDA	Medium	Mid
F.6	Support business location and expansion efforts through financial assistance and incentives	Assist new and expanding businesses in accessing the appropriate local, regional, and state programs to facilitate project completion and success.	JCIDA	Medium	Ongoing
F.7	Capital Project: Improve and expand rail infrastructure and rail siding availability	Rail infrastructure was identified as an important locational factor for existing and new industries. The rail infrastructure exists in Jefferson County, but additional rail sidings are needed to make the sites more attractive.	JCIDA	Medium	Mid

Industry: Tourism, Accommodation, Food Services and Retail Trade					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
G.1	Continue to develop, enhance, and market recreational opportunities	Communities should continue to pursue grant opportunities for public recreation resource development, such as trails, park lands. Continue to develop the County's expansive natural resources.	Municipalities, area Chambers of Commerce, trail organizations, and TIITC	High	Short
G.2	Continually enhance promotion of the Thousand Islands-Seaway Wine Trail and the Thousand Islands Agricultural Tour	Expand marketing projects focused on agri-tourism and develop a forum for cooperative marketing that integrates agriculture and local foods into the County's tourism industry.	TIITC, Thousand Island Seaway Trail Association and JCIDA	High	Short
G.3	Continue to market the Greater Watertown area as an international retail destination	Reach out to regional and international consumer markets within driving distance to attract consumers to the Greater Watertown area.	TIITC and Chamber of Commerce	High	Short
G.4	Consider a retail recruitment strategy	Identify other retailers who might want to locate in the Watertown area and target them for attraction. Retail recruitment efforts should include targeting retailers that would appeal to a local and international consumer.	Chamber of Commerce	Low	Long

G.5	Facilitate and encourage investment in public and private tourism infrastructure to achieve standards comparable to competing destinations	Support upgrades for planned resort and hotel projects and re-developments. Improve associated municipal infrastructure to increase viability of private resort/hotel investments. Focus on specific tourism hub communities where potential and interest exists for additional tourism development.	Municipalities and TIITC	Medium	Mid
G.6	Continue development of hospitably sector workforce needs	With such a large retail and food service industry, Jefferson County should consider any programs needed to improve upon customer service skills.	JCC and BOCES	Medium	Mid
G.7	Commission Jefferson County Multi-Use Facility Feasibility Study	A feasibility study will soon be conducted to analyze development of a multi-use facility for large community events, concerts, etc. See also goal/action I.5.	JCC Foundation and others	Medium	Mid
G.8	Pursue continuing implementation of recommendations of recently completed Local Waterfront Revitalization Plans and the Black River Blueway Trail Plan	A major recreational resource for the County is its myriad of waterfronts. Planning and marketing efforts should continue to maximize recreational utilization of the Black River, Lake Ontario, St. Lawrence River, and Indian River Lakes.	Municipalities	Low	Long
Industry: Agriculture					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
H.1	Develop and market local value-added products	Value-added agricultural products can generate higher profits for farmers. Assist value-added producers in marketing and promoting their products. Help producers develop product brand differentiation from other regions	JCIDA and CCE	High	Short
H.2	Improve production capacity of commodity and specialty crops and assist farms with diversification and new business startups.	Jefferson County has untapped potential to increase commodity and specialty crop production such as corn, soybeans, grapes, vegetables, maple syrup and honey. Efforts to help farms increase their production of these crops will be beneficial to our local economy	JCIDA and CCE	High	Short

H.3	Investigate the potential for biomass feedstock crop production	Establishing biomass crops such as willow or switchgrass could encourage the utilization of marginal farmlands to meet the anticipated demand for biomass fuel while providing an additional source of revenue to landowners.	JCIDA and CCE	High	Mid
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
H.4	Address needs of the dairy industry	The dairy industry has needs and opportunities that when addressed will allow for greater profitability and improved economic impact on local communities. Efforts should be made to assist the dairy industry in growing its capacity profitably.	JCIDA, CCE, SWCD, and USDA	High	Short
H.5	Maintain and expand agricultural economic development efforts	Maintain and expand efforts to assist in the retention, growth and promotion of Jefferson County's broader agricultural industry. Consider cooperative solutions wherever possible.	JCIDA, CCE, and Farm Bureau	Medium	Mid
H.6	Update the County's Agricultural and Farmland Protection Plan	The County's Agriculture and Farmland Protection Plan will be eligible for a State-assisted update in 2013. The update will allow the County to re-examine pressures on its agriculture land resource base and refine measures to maintain and improve the viability of local agricultural production.	JCIDA, AFPB and County	Medium	Short
H.7	Develop appropriate agriculture workforce development programs	Continue to partner with Cornell Cooperative Extension on training classes to maintain a workforce that can meet the needs of the advancing agricultural industry.	JCIDA, CCE, and WIB	Medium	Mid
H.8	Promote existing sources of capital and work to find new sources to assist with the capital project needs of agriculture	As agriculture is a capital intensive industry, there is a need for financial and technical assistance for producers interested in growing their production capability.	JCIDA	Medium	Long
H.9	Capital Project: Expand rail siding infrastructure	An additional agriculture rail siding facility will support the transport of commodity crops to outside markets and expand the production capacity of the entire region.	JCIDA	High	Medium

Industry: Health Care and Social Assistance					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
I.1	Develop a training cost sharing model to increase the pool of needed health care workers	Recruit assistance from regional medical care providers and other sources to help pay for the cost of nursing and health care programs at JCC. Costs could potentially be covered by regional sponsors that would benefit by having a larger pool of trained labor.	JCC, FDRHPO, and WIB	High	Short
I.2	Offer tuition repayment or other incentives attract and retain top nursing educators	It is difficult to attract and retain nursing educators because of their potential for higher pay in a clinic setting. Offer incentives for nursing educators to stay in Jefferson County; such as tuition repayment, tuition remission for family members, etc.	JCC and FDRHPO	Medium	Long
I.3	Hold an annual health care industry summit	Bring together health care providers from all aspects of the profession to gather information on their training needs, workforce issues, and opinions on where the industry is going. Empower health care employees at all levels to get involved.	FDRHPO, JPO, and RHA	Medium	Short
I.4	Continue youth shadowing internships	FDRHPO provides paid internships for local youth interested in the health professions. Such experiences help to encourage the pursuit of health careers. These youth are more likely to return to the community after their education, thereby aiding long-term recruitment of health care providers to the area.	FDRHPO and RHA	Medium	Ongoing
I.5	Capital Project: Conduct a feasibility study for Coffeen Street Higher Education Multi Use Complex	Without adequate lab space JCC is precluded from offering additional sessions and more programs. The Coffeen Street Higher Education Multi Use Complex could include lab space that would allow JCC and regional partners to expand their nursing program. See also multi-purpose facility, Goal/Action G.7.	JCC, City ,and County	High	Mid

Industry: Information Technology					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
J.1	Develop a technology training and internship program to promote and support the use of new technologies in local businesses	Develop a technology training and internship program to assist small businesses with innovative uses of information technology to further their business.	JCC and BOCES	High	Short
J.2	Pursue funding for Health Care Information Management/Technology Certificate	Work to develop on-the-job training or internship programs to ensure adequate supply of labor skilled in both health care and information technology.	JCC and FDRHPO	High	Mid
J.3	Start an information technology peer group	Information technology is an area where learning from other practitioners is highly useful. Recruit one or two people in the industry who would be interested in establishing a group to share information, offer workshops, collaborate, and encourage innovation.	JCIDA	Medium	Mid
J.4	Identify and develop IT skills needed in non-IT industries	Most IT occupations are in nontraditional IT industries. Include non-IT industries in the review of skills and workforce needs.	WIB, BOCES, and JCC	Medium	Mid
Industry: Call Centers, Back Office Support Industries (Finance, Real Estate, Insurance)					
Action/Objective		Description	Suggested Lead Agency/Partner	Priority Level	Timeframe
K.1	Market the community's advanced telecommunications infrastructure and available labor force to attract back office operations	Strategically identify business sectors and classifications that would benefit from the configuration and characteristics of Open Access Network. This is also a target industry in the regional Drum Country Business marketing effort.	JCIDA and Drum Country Business	High	Mid
K.2	Begin a targeted marketing strategy for call center operation based on targeted industries and workforce capacity	Meet with existing call center operators to discuss current needs, possible expansion, incentive programs, etc that would allow them to expand.	JCIDA and Drum Country Business	Medium	Mid

ATTACHMENTS

Attachment A – Glossary

AFPB – Agriculture and Farmland Protection Board
BOCES – Board of Cooperative Educational Services
CCE – Cornell Cooperative Extension
CEDS – Comprehensive Economic Development Strategy
CME- Canadian Manufacturers & Exporters
CSA – Community Supported Agriculture
DANC – Development Authority of the North Country
ESD – Empire State Development
FDRLO – Fort Drum Regional Liaison Organization
FDRHPO - Fort Drum Regional Health Plan Organization
FTZ – Foreign Trade Zone
IDF – Innovation Demonstration Fund
iMiN – Interactive Manufacturing Innovation Network
JCADC – Jefferson County Agricultural Development Corporation
JCC – Jefferson Community College
JCIDA – Jefferson County Industrial Development Agency
JCJDC – Jefferson County Job Development Corporation
JPO – Jefferson Physicians Organization
MGD – Million Gallons per Day
NCA – North Country Alliance
PTAC – Procurement Technical Assistance Center
RHA – Rural Health Association
SBDC – Small Business Development Corporation
STEM – Science, Technology, Engineering and Mathematics
SUNY – State University of New York
SWCD – Soil and Water Conservation Districts
SWOT – Strengths, Weaknesses, Opportunities and Threats
TIITC – Thousand Islands International Tourism Council
WIB – Workforce Investment Board



Jefferson County, New York

Comprehensive Economic Development Strategy (CEDS)

2012

Supplemental Report

A "BLUEPRINT" FOR ECONOMIC DEVELOPMENT ACTION

Prepared by the Jefferson County CEDS Committee in
Partnership with Camoin Associates, Inc.

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INTRODUCTION

This Supplement provides additional detail and documentation of the data collected, methods used, and analysis conducted for the *Jefferson County, NY 2012 Comprehensive Economic Development Strategy* (i.e. the 2012 CEDS). The 2012 CEDS presents major findings of the analyses conducted, summarizes the CEDS Committee's economic development vision, and outlines an implementation plan to achieve this vision. In an effort to maintain a streamlined, straightforward CEDS document and implementation plan, much of the detailed analysis completed as part of this project has been compiled into this Supplement report. Data and information contained in this Supplement are provided to support the 2012 CEDS by serving as a thorough reference document.

The first section in the Supplement is the *Economic Data Analysis*, which contains detailed industry and occupation data for the County, Region, and State. From this data, Key Industries are identified and further detail on the top occupations within each of the Key Industries is analyzed. Following the Key Industry analysis is the *Workforce Analysis*, which includes an evaluation of Jefferson County's regional workforce skills, educational attainment, labor market demand, and career clusters and pathways.

The second section in the Supplement is *Interview Summaries*. Camoin Associates conducted interviews with local business leaders, economic developers, and other stakeholders to gain knowledge and information to help reveal the strengths of the relationship between firms, service providers, and other stakeholders involved in the local and regional economy.

The third section is the *Action Plan Narrative*, a more detailed description of the Action Plan Matrix that is included in Section VII of the CEDS document. The Supplement narrative further describes the specific action items as well as provides performance measures for quantifying the impact of the various action items.

The final section of this Supplement, *Additional Information & References*, is included to provide a more detailed explanation for some of the terms and methods applied in the economic analysis.

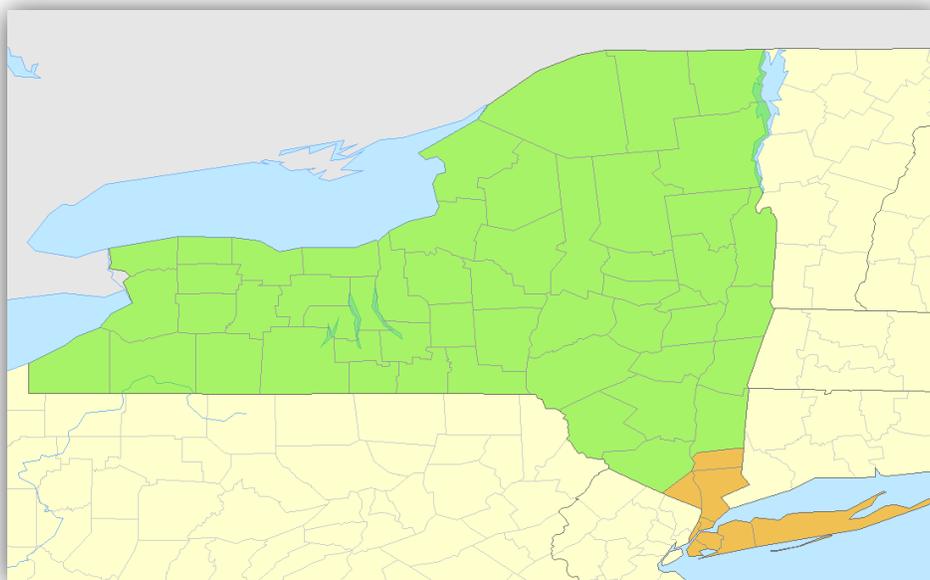
ECONOMIC DATA ANALYSIS – COUNTY, REGION AND STATE DETAILS

Section IV of the 2012 CEDS contains an overview of the following Economic Data Analysis. This data analysis was conducted to identify existing conditions and trends within industry sectors that make up the local and regional economy. Jefferson County industry and occupational trends are compared to trends in the Jefferson County Economic Region and Upstate New York (see maps below, full-size maps are provided in the 2012 CEDS).

Jefferson County's Economic Region



Upstate New York Study Area



Industry Analysis

Data presented in this section of the report are broken down into industry sectors, organized using the North American Industrial Classification System (NAICS). NAICS codes are maintained by the U.S. Census Bureau. The analysis begins by presenting data at the 2-digit NAICS code level, the highest aggregated level available, and then presents data at the 4-digit code level. Two-digit industry codes represent broad categories, such as educational services, whereas 4-digit industry codes present a finer level of detail, such as elementary and secondary schools. All of the industry data presented in this section are obtained from EMSI (Economic Modeling Specialists, Inc.) complete employment¹. 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 based on the latest available EMSI industry data combined with past trends in each industry, national growth rates of industries (Bureau of Labor Statistics), and data from the New York State Department of Labor. Projections provided in this report are informed guesses based on past and current trends. Additional information about EMSI's projections can be found in the section of this document titled "Additional Information & References".

For those interested in understanding the composition of these NAICS codes and for more detail about what is included, we direct the reader to: <http://www.census.gov/eos/www/naics/>.

Establishments by Industry

This first set of tables outlines the number of establishments within each industry at the 2-digit and 4-digit NAICS code level. Data collected from EMSI is shown for Jefferson County and Upstate New York (this data is only available at the county-level; therefore, information for the Economic Region is not available).

It is important to note that farms do not have the same reporting requirements as other businesses and are greatly underrepresented in the EMSI data. Therefore, the number of establishments in the agriculture, forestry, fishing and hunting industry has been supplemented with information from the 2007 Census of Agriculture and the 2009 USDA County Estimates Book. Please refer to the footnote at the bottom of the following table for additional information. Additionally, due to the complexity (process described above) of projecting the number of agriculture establishments, this adjustment has not been made for the Upstate New York region and EMSI data is shown. However, it is expected that as with Jefferson County, the number of establishments reported by EMSI is significantly lower than the actual number of establishments in this industry in Upstate New York.

¹ The complete employment data set includes jobs that may or may not be covered by unemployment insurance, in other words it includes both traditional employment and non-traditional employment such as the self-employed (self-employed includes sole proprietorships and partnerships).

Industry by Number of Establishments in Jefferson County (2-Digit)			
NAICS	Description	2011 Jobs	2010 Establishments
11	Agriculture, Forestry, Fishing and Hunting ¹	1,484	940
44-45	Retail Trade	7,873	507
72	Accommodation and Food Services	4,269	343
23	Construction	3,285	328
62	Health Care and Social Assistance	7,467	302
81	Other Services (except Public Administration)	2,513	285
90	Government	28,427	152
54	Professional, Scientific, and Technical Services	1,577	148
48-49	Transportation and Warehousing	2,248	125
53	Real Estate and Rental and Leasing	2,073	125
52	Finance and Insurance	1,867	111
42	Wholesale Trade	1,170	102
56	Administrative and Support and Waste Management Services	1,888	101
31-33	Manufacturing	2,599	82
71	Arts, Entertainment, and Recreation	878	70
51	Information	857	53
61	Educational Services	381	21
55	Management of Companies and Enterprises	199	16
21	Mining, Quarrying, and Oil and Gas Extraction	163	12
22	Utilities	208	10
	Total	71,426	3,833

Source: EMSI Complete Employment - 2011.3

1. Considering that farms do not have the same reporting requirements as other businesses, the number of establishments in the NAICS 11 industry sector is an estimate. The 2009 USDA County Estimates Book shows 936 farms in Jefferson County and EMSI reports 46 establishments in this industry sector for 2010. Therefore, the conservative estimate of 940 establishments is made.

Source: http://www.nass.usda.gov/Statistics_by_State/New_York/Publications/County_Estimates/2009countyestimatesbook.pdf.

Industry by Number of Establishments in Upstate NY (2-Digit)			
NAICS	Description	2011 Jobs	2010 Establishments
44-45	Retail Trade	416,555	25,795
23	Construction	167,241	18,709
62	Health Care and Social Assistance	503,009	18,409
81	Other Services (except Public Administration)	163,420	17,415
72	Accommodation and Food Services	244,322	16,929
54	Professional, Scientific, and Technical Services	226,517	16,582
42	Wholesale Trade	113,741	9,932
56	Administrative and Support and Waste Management Services	173,077	9,400
52	Finance and Insurance	186,628	8,898
31-33	Manufacturing	290,657	8,053
53	Real Estate and Rental and Leasing	130,494	6,347
90	Government	618,636	6,082
48-49	Transportation and Warehousing	111,856	5,540
71	Arts, Entertainment, and Recreation	86,386	3,440
51	Information	57,719	2,874
61	Educational Services	153,934	2,210
11	Agriculture, Forestry, Fishing and Hunting	59,455	2,030
55	Management of Companies and Enterprises	46,068	1,368
21	Mining, Quarrying, and Oil and Gas Extraction	15,288	362
22	Utilities	14,646	324
	Total	3,779,649	180,699

Source: EMSI Complete Employment - 2011.3

Top 25 Industries by Number of Establishments in Jefferson County (4-Digit)			
NAICS	Description	Jobs 2011	Establishments 2010
7221	Full-Service Restaurants	1,829	130
2361	Residential Building Construction	768	125
7222	Limited-Service Eating Places	1,575	114
9300	Local government	6,652	104
6211	Offices of Physicians	1,053	77
8111	Automotive Repair and Maintenance	523	70
4471	Gasoline Stations	466	58
7139	Other Amusement and Recreation Industries	486	57
5311	Lessors of Real Estate	581	50
2382	Building Equipment Contractors	642	48
5242	Agencies, Brokerages, & Other Insurance Related Activities	581	48
2383	Building Finishing Contractors	383	44
5221	Depository Credit Intermediation	468	44
7211	Traveler Accommodation	577	44
5617	Services to Buildings and Dwellings	580	42
6232	Residential Mental Retardation, Mental Health Facilities	503	42
2381	Foundation, Structure, and Building Exterior Contractors	283	41
4461	Health and Personal Care Stores	546	41
4911	Postal Service	278	39
6212	Offices of Dentists	336	39
9110	Federal government, civilian, except postal service	3,068	37
4411	Automobile Dealers	664	36
4481	Clothing Stores	513	36
6213	Offices of Other Health Practitioners	312	36
8131	Religious Organizations	401	36
11A0	Crop and animal production	1,233	35

Source: EMSI Complete Employment - 2011.3

Top 25 Industries by Number of Establishments in Upstate NY (4-Digit)			
NAICS	Description	Jobs 2011	Establishments 2010
7221	Full-Service Restaurants	95,916	6,263
7222	Limited-Service Eating Places	81,207	6,067
2361	Residential Building Construction	26,255	5,235
9300	Local government	398,333	4,642
6211	Offices of Physicians	59,948	4,637
5617	Services to Buildings and Dwellings	47,244	4,360
2382	Building Equipment Contractors	39,126	4,063
8111	Automotive Repair and Maintenance	26,747	4,002
5411	Legal Services	29,622	3,675
2383	Building Finishing Contractors	29,328	3,025
8131	Religious Organizations	31,273	3,025
5242	Agencies, Brokerages, and Other Insurance Related Activities	32,146	2,975
5415	Computer Systems Design and Related Services	30,887	2,904
4251	Wholesale Electronic Markets and Agents and Brokers	13,293	2,870
5221	Depository Credit Intermediation	36,686	2,820
4471	Gasoline Stations	20,875	2,617
5311	Lessors of Real Estate	45,592	2,578
6212	Offices of Dentists	18,748	2,510
4451	Grocery Stores	73,682	2,445
5416	Management, Scientific, and Technical Consulting Services	29,325	2,413
6213	Offices of Other Health Practitioners	28,437	2,381
2381	Foundation, Structure, and Building Exterior Contractors	18,516	2,344
5412	Accounting, Tax Preparation, Bookkeeping, & Payroll Services	28,669	2,335
8121	Personal Care Services	20,851	2,327
2389	Other Specialty Trade Contractors	26,543	2,249

Source: EMSI Complete Employment - 2011.3

Largest Industries

The size of industry sectors within each geography is determined by looking at industry employment data collected from EMSI for both the 2-digit and 4-digit industry sectors. Each industry is ranked from largest to smallest by the number of employees in 2011. The percent of the workforce that this industry represents within the geography is shown as well. At the bottom of the 2-digit tables, the total employment for all industries is given; however, it is important to note that this number does not represent the total number of jobs in the community because at the 2-digit level this figure does not include employees of industries with less than 10 jobs.

This data is used to identify the largest industries and industry sectors, based on the number of individuals employed in that sector, within Jefferson County and the comparison geographies. It is also used to evaluate the distribution of employment by industry within each community.

Largest Industries in Jefferson County (2-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
90	Government	28,427	39.8%
44-45	Retail Trade	7,873	11.0%
62	Health Care and Social Assistance	7,467	10.5%
72	Accommodation and Food Services	4,269	6.0%
23	Construction	3,285	4.6%
31-33	Manufacturing	2,599	3.6%
81	Other Services (except Public Administration)	2,513	3.5%
48-49	Transportation and Warehousing	2,248	3.1%
53	Real Estate and Rental and Leasing	2,073	2.9%
56	Administrative and Support and Waste Management Services	1,888	2.6%
52	Finance and Insurance	1,867	2.6%
54	Professional, Scientific, and Technical Services	1,577	2.2%
11	Agriculture, Forestry, Fishing and Hunting	1,484	2.1%
42	Wholesale Trade	1,170	1.6%
71	Arts, Entertainment, and Recreation	878	1.2%
51	Information	857	1.2%
61	Educational Services	381	0.5%
22	Utilities	208	0.3%
55	Management of Companies and Enterprises	199	0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	163	0.2%
	Total	71,425	100%

Source: EMSI Complete Employment - 2011.3

Largest Industries in Economic Region (2-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
90	Government	83,616	19.4%
62	Health Care and Social Assistance	54,403	12.6%
44-45	Retail Trade	44,955	10.4%
31-33	Manufacturing	28,211	6.5%
72	Accommodation and Food Services	27,806	6.4%
54	Professional, Scientific, and Technical Services	23,253	5.4%
52	Finance and Insurance	22,594	5.2%
56	Administrative and Support and Waste Management Services	21,480	5.0%
23	Construction	19,647	4.6%
81	Other Services (except Public Administration)	18,192	4.2%
42	Wholesale Trade	16,237	3.8%
61	Educational Services	15,932	3.7%
48-49	Transportation and Warehousing	14,920	3.5%
53	Real Estate and Rental and Leasing	13,023	3.0%
71	Arts, Entertainment, and Recreation	8,217	1.9%
51	Information	6,045	1.4%
11	Agriculture, Forestry, Fishing and Hunting	5,249	1.2%
22	Utilities	3,947	0.9%
55	Management of Companies and Enterprises	3,001	0.7%
21	Mining, Quarrying, and Oil and Gas Extraction	624	0.1%
	Total	431,352	100%

Source: EMSI Complete Employment - 2011.3

Largest Industries in Upstate NY (2-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
90	Government	618,636	16.4%
62	Health Care and Social Assistance	503,009	13.3%
44-45	Retail Trade	416,555	11.0%
31-33	Manufacturing	290,657	7.7%
72	Accommodation and Food Services	244,322	6.5%
54	Professional, Scientific, and Technical Services	226,517	6.0%
52	Finance and Insurance	186,628	4.9%
56	Administrative and Support and Waste Management Services	173,077	4.6%
23	Construction	167,241	4.4%
81	Other Services (except Public Administration)	163,420	4.3%
61	Educational Services	153,934	4.1%
53	Real Estate and Rental and Leasing	130,494	3.5%
42	Wholesale Trade	113,741	3.0%
48-49	Transportation and Warehousing	111,856	3.0%
71	Arts, Entertainment, and Recreation	86,386	2.3%
11	Agriculture, Forestry, Fishing and Hunting	59,455	1.6%
51	Information	57,719	1.5%
55	Management of Companies and Enterprises	46,068	1.2%
21	Mining, Quarrying, and Oil and Gas Extraction	15,288	0.4%
22	Utilities	14,646	0.4%
	Total	3,779,649	100%

Source: EMSI Complete Employment - 2011.3

Top 25 Largest Industries in Jefferson County (4-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
9120	Federal government, military	17,074	23.9%
9300	Local government	6,652	9.3%
9110	Federal government, civilian, except postal service	3,068	4.3%
6221	General Medical and Surgical Hospitals	1,891	2.6%
7221	Full-Service Restaurants	1,829	2.6%
9200	State government	1,633	2.3%
7222	Limited-Service Eating Places	1,575	2.2%
11A0	Crop and animal production	1,233	1.7%
6211	Offices of Physicians	1,053	1.5%
6244	Child Day Care Services	1,014	1.4%
4521	Department Stores	827	1.2%
4451	Grocery Stores	798	1.1%
6241	Individual and Family Services	798	1.1%
5614	Business Support Services	795	1.1%
2361	Residential Building Construction	768	1.1%
4529	Other General Merchandise Stores	743	1.0%
6231	Nursing Care Facilities	709	1.0%
5312	Offices of Real Estate Agents and Brokers	666	0.9%
4411	Automobile Dealers	664	0.9%
2382	Building Equipment Contractors	642	0.9%
4881	Support Activities for Air Transportation	613	0.9%
4441	Building Material and Supplies Dealers	589	0.8%
4543	Direct Selling Establishments	589	0.8%
5311	Lessors of Real Estate	581	0.8%
5242	Agencies, Brokerages, & Other Insurance Related Activities	581	0.8%

Source: EMSI Complete Employment - 2011.3

Top 25 Largest Industries in Economic Region (4-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
9300	Local government	44,271	10.3%
9120	Federal government, military	18,212	4.2%
9200	State government	15,224	3.5%
6113	Colleges, Universities, and Professional Schools	11,858	2.7%
7221	Full-Service Restaurants	10,929	2.5%
6221	General Medical and Surgical Hospitals	10,899	2.5%
7222	Limited-Service Eating Places	9,594	2.2%
4451	Grocery Stores	8,426	2.0%
6211	Offices of Physicians	7,788	1.8%
5613	Employment Services	7,128	1.7%
6231	Nursing Care Facilities	6,955	1.6%
6241	Individual and Family Services	6,329	1.5%
9110	Federal government, civilian, except postal service	5,909	1.4%
5241	Insurance Carriers	5,648	1.3%
5617	Services to Buildings and Dwellings	5,359	1.2%
6244	Child Day Care Services	5,321	1.2%
5239	Other Financial Investment Activities	5,060	1.2%
2382	Building Equipment Contractors	4,636	1.1%
5242	Agencies, Brokerages, and Other Insurance Related Activities	4,586	1.1%
5413	Architectural, Engineering, and Related Services	4,437	1.0%
5311	Lessors of Real Estate	4,336	1.0%
7139	Other Amusement and Recreation Industries	4,164	1.0%
5419	Other Professional, Scientific, and Technical Services	4,065	0.9%
5221	Depository Credit Intermediation	4,021	0.9%
11A0	Crop and animal production	3,889	0.9%

Source: EMSI Complete Employment - 2011.3

Top 25 Largest Industries in Upstate NY (4-Digit)			
NAICS	Description	Jobs 2011	% of Workforce
9300	Local government	398,333	10.5%
9200	State government	156,587	4.1%
6221	General Medical and Surgical Hospitals	114,881	3.0%
6113	Colleges, Universities, and Professional Schools	98,487	2.6%
7221	Full-Service Restaurants	95,916	2.5%
7222	Limited-Service Eating Places	81,207	2.1%
4451	Grocery Stores	73,682	1.9%
6211	Offices of Physicians	59,948	1.6%
6231	Nursing Care Facilities	55,075	1.5%
5239	Other Financial Investment Activities	50,544	1.3%
5613	Employment Services	50,166	1.3%
6241	Individual and Family Services	49,339	1.3%
11A0	Crop and animal production	47,812	1.3%
5617	Services to Buildings and Dwellings	47,244	1.2%
5511	Management of Companies and Enterprises	46,068	1.2%
5311	Lessors of Real Estate	45,592	1.2%
6244	Child Day Care Services	45,515	1.2%
5419	Other Professional, Scientific, and Technical Services	41,766	1.1%
2382	Building Equipment Contractors	39,126	1.0%
5312	Offices of Real Estate Agents and Brokers	39,037	1.0%
5221	Depository Credit Intermediation	36,686	1.0%
5241	Insurance Carriers	35,151	0.9%
9120	Federal government, military	35,048	0.9%
5313	Activities Related to Real Estate	34,584	0.9%
7139	Other Amusement and Recreation Industries	34,564	0.9%

Source: EMSI Complete Employment - 2011.3

Historic Growth

To identify the fastest growing industries in Jefferson County, the Economic Region, and Upstate New York, the historic (2001-2011) and projected (2011-2021) change in employment as prepared by EMSI is presented by the number of employees lost or gained and the percent change within each industry. This industry data is presented at both the 2-digit and 4-digit NAICS level. The total change in employment in each region can be found at the bottom of the 2-digit NAICS code tables.

It is important to look at past and projected change in employment by industry to identify which industries have experienced recent growth or decline and which are expected to grow or shrink in the future. The projections as calculated by EMSI and shown in the tables throughout this document can be used to detect industries that may be beginning to struggle or, alternatively, those that are thriving. Identification of industries in transition can help community leaders make decisions about how and where to direct economic development support.

Fastest Growing Industries in Jefferson County 2001-2011 (2-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
90	Government	22,174	28,427	6,253	28%
62	Health Care and Social Assistance	6,067	7,467	1,400	23%
56	Administrative, Support & Waste Management	921	1,888	967	105%
53	Real Estate and Rental and Leasing	1,247	2,073	826	66%
23	Construction	2,569	3,285	716	28%
44-45	Retail Trade	7,259	7,873	614	8%
72	Accommodation and Food Services	3,708	4,269	561	15%
48-49	Transportation and Warehousing	1,745	2,248	503	29%
52	Finance and Insurance	1,513	1,867	354	23%
54	Professional, Scientific, and Technical Services	1,304	1,577	273	21%
81	Other Services (except Public Administration)	2,393	2,513	120	5%
61	Educational Services	265	381	116	44%
71	Arts, Entertainment, and Recreation	769	878	109	14%
21	Mining, Quarrying, and Oil and Gas Extraction	118	163	45	38%
42	Wholesale Trade	1,126	1,170	44	4%
51	Information	852	857	5	1%
22	Utilities	316	208	(108)	(34%)
11	Agriculture, Forestry, Fishing and Hunting	1,837	1,484	(353)	(19%)
31-33	Manufacturing	3,230	2,599	(631)	(20%)
55	Management of Companies and Enterprises	920	199	(721)	(78%)
	Total	60,333	71,425	11,092	18%

Source: EMSI Complete Employment - 2011.3

Fastest Growing Industries in Economic Region 2001-2011 (2-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
62	Health Care and Social Assistance	44,829	54,403	9,574	21%
90	Government	77,500	83,616	6,116	8%
56	Administrative & Support & Waste Management	16,509	21,480	4,971	30%
54	Professional, Scientific, and Technical Services	19,875	23,253	3,378	17%
52	Finance and Insurance	19,595	22,594	2,999	15%
53	Real Estate and Rental and Leasing	10,329	13,023	2,694	26%
72	Accommodation and Food Services	25,192	27,806	2,614	10%
71	Arts, Entertainment, and Recreation	6,369	8,217	1,848	29%
61	Educational Services	14,360	15,932	1,572	11%
48-49	Transportation and Warehousing	13,932	14,920	988	7%
21	Mining, Quarrying, and Oil and Gas Extraction	545	624	79	14%
23	Construction	20,319	19,647	(672)	(3%)
81	Other Services (except Public Administration)	19,046	18,192	(854)	(4%)
11	Agriculture, Forestry, Fishing and Hunting	6,119	5,249	(870)	(14%)
55	Management of Companies and Enterprises	4,188	3,001	(1,187)	(28%)
42	Wholesale Trade	17,614	16,237	(1,377)	(8%)
44-45	Retail Trade	46,568	44,955	(1,613)	(3%)
22	Utilities	5,833	3,947	(1,886)	(32%)
51	Information	8,544	6,045	(2,499)	(29%)
31-33	Manufacturing	41,833	28,211	(13,622)	(33%)
	Total	419,099	431,352	12,253	3%

Source: EMSI Complete Employment - 2011.3

Fastest Growing Industries in Upstate NY 2001-2011 (2-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
62	Health Care and Social Assistance	432,826	503,009	70,183	16%
52	Finance and Insurance	154,925	186,628	31,703	20%
53	Real Estate and Rental and Leasing	99,183	130,494	31,311	32%
54	Professional, Scientific, and Technical Services	196,108	226,517	30,409	16%
61	Educational Services	126,113	153,934	27,821	22%
72	Accommodation and Food Services	228,017	244,322	16,305	7%
71	Arts, Entertainment, and Recreation	71,880	86,386	14,506	20%
56	Administrative, Support & Waste Management	161,844	173,077	11,233	7%
21	Mining, Quarrying, and Oil and Gas Extraction	8,281	15,288	7,007	85%
55	Management of Companies and Enterprises	41,020	46,068	5,048	12%
90	Government	614,766	618,636	3,870	1%
81	Other Services (except Public Administration)	161,978	163,420	1,442	1%
48-49	Transportation and Warehousing	112,666	111,856	(810)	(1%)
22	Utilities	19,066	14,646	(4,420)	(23%)
11	Agriculture, Forestry, Fishing and Hunting	66,866	59,455	(7,411)	(11%)
23	Construction	177,399	167,241	(10,158)	(6%)
42	Wholesale Trade	127,679	113,741	(13,938)	(11%)
51	Information	77,648	57,719	(19,929)	(26%)
44-45	Retail Trade	438,834	416,555	(22,279)	(5%)
31-33	Manufacturing	420,301	290,657	(129,644)	(31%)
	Total	3,737,400	3,779,649	42,249	1%

Source: EMSI Complete Employment - 2011.3

Of the top twenty-five fastest-growing industries in the County, EMSI suggests that twelve grew by more than 100% - more than doubling the number of jobs within these industries in ten years. Other transit and ground passenger transportation went from 10 to 151 jobs and grew by about 1,400%. Additionally, warehousing and storage is shown to have grown from 26 to 196 or 550% and residential mental retardation and mental health facilities climbed from 154 to 503 jobs, an increase of 227%. These trends estimated by EMSI are further detailed in the following series of tables.

Top 25 Fastest Growing Industries in Jefferson County 2001-2011 (4-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
9120	Federal government, military	11,252	17,074	5,822	52%
5614	Business Support Services	100	795	695	695%
9110	Federal government, civilian, except postal service	2,411	3,068	657	27%
6241	Individual and Family Services	344	798	454	132%
4529	Other General Merchandise Stores	297	743	446	150%
5312	Offices of Real Estate Agents and Brokers	237	666	429	181%
7221	Full-Service Restaurants	1,461	1,829	368	25%
5239	Other Financial Investment Activities	195	549	354	182%
6232	Residential Mental Retardation, Mental Health Facilities	154	503	349	227%
5313	Activities Related to Real Estate	233	565	332	142%
4881	Support Activities for Air Transportation	301	613	312	104%
7222	Limited-Service Eating Places	1,266	1,575	309	24%
2362	Nonresidential Building Construction	237	542	305	129%
6244	Child Day Care Services	748	1,014	266	36%
2361	Residential Building Construction	522	768	246	47%
4481	Clothing Stores	289	513	224	78%
5617	Services to Buildings and Dwellings	369	580	211	57%
9300	Local government	6,484	6,652	168	3%
6211	Offices of Physicians	900	1,053	153	17%
4931	Warehousing and Storage	26	169	143	550%
4859	Other Transit and Ground Passenger Transportation	10	151	141	1410%
4244	Grocery and Related Product Merchant Wholesalers	224	354	130	58%
8111	Automotive Repair and Maintenance	402	523	121	30%
6243	Vocational Rehabilitation Services	100	218	118	118%
2382	Building Equipment Contractors	528	642	114	22%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Industries in Economic Region 2001-2011 (4-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
9120	Federal government, military	12,708	18,212	5,504	43%
5239	Other Financial Investment Activities	2,319	5,060	2,741	118%
6241	Individual and Family Services	3,869	6,329	2,460	64%
4529	Other General Merchandise Stores	1,333	3,746	2,413	181%
5613	Employment Services	5,095	7,128	2,033	40%
5312	Offices of Real Estate Agents and Brokers	1,905	3,829	1,924	101%
7222	Limited-Service Eating Places	7,714	9,594	1,880	24%
6211	Offices of Physicians	6,148	7,788	1,640	27%
5416	Management, Scientific, and Technical Consulting Services	1,806	3,433	1,627	90%
5313	Activities Related to Real Estate	2,042	3,413	1,371	67%
6113	Colleges, Universities, and Professional Schools	10,498	11,858	1,360	13%
7139	Other Amusement and Recreation Industries	2,806	4,164	1,358	48%
6244	Child Day Care Services	3,969	5,321	1,352	34%
5614	Business Support Services	1,506	2,770	1,264	84%
4931	Warehousing and Storage	816	1,905	1,089	133%
6231	Nursing Care Facilities	6,066	6,955	889	15%
6233	Community Care Facilities for the Elderly	785	1,540	755	96%
5221	Depository Credit Intermediation	3,277	4,021	744	23%
5419	Other Professional, Scientific, and Technical Services	3,349	4,065	716	21%
6116	Other Schools and Instruction	1,004	1,718	714	71%
9110	Federal government, civilian, except postal service	5,213	5,909	696	13%
6232	Residential Mental Retardation, Mental Health Facilities	1,228	1,898	670	55%
7221	Full-Service Restaurants	10,267	10,929	662	6%
6213	Offices of Other Health Practitioners	2,389	3,045	656	27%
9300	Local government	43,663	44,271	608	1%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Industries in Upstate NY 2001-2011 (4-Digit)					
NAICS	Description	Jobs 2001	Jobs 2011	Change	% Change
5239	Other Financial Investment Activities	27,639	50,544	22,905	83%
6113	Colleges, Universities, and Professional Schools	79,158	98,487	19,329	24%
5312	Offices of Real Estate Agents and Brokers	21,373	39,037	17,664	83%
4529	Other General Merchandise Stores	17,652	32,644	14,992	85%
5313	Activities Related to Real Estate	19,797	34,584	14,787	75%
6241	Individual and Family Services	35,484	49,339	13,855	39%
7222	Limited-Service Eating Places	67,788	81,207	13,419	20%
9300	Local government	385,254	398,333	13,079	3%
6232	Residential Mental Retardation, Mental Health Facilities	21,282	33,056	11,774	55%
5416	Management, Scientific, and Technical Consulting Services	18,726	29,325	10,599	57%
6211	Offices of Physicians	50,188	59,948	9,760	19%
5419	Other Professional, Scientific, and Technical Services	32,932	41,766	8,834	27%
5614	Business Support Services	19,441	28,192	8,751	45%
7221	Full-Service Restaurants	88,224	95,916	7,692	9%
6213	Offices of Other Health Practitioners	21,566	28,437	6,871	32%
5617	Services to Buildings and Dwellings	40,429	47,244	6,815	17%
6116	Other Schools and Instruction	12,239	19,003	6,764	55%
7139	Other Amusement and Recreation Industries	28,106	34,564	6,458	23%
2111	Oil and Gas Extraction	3,355	9,525	6,170	184%
4931	Warehousing and Storage	10,024	15,618	5,594	56%
4481	Clothing Stores	20,679	26,091	5,412	26%
5511	Management of Companies and Enterprises	41,020	46,068	5,048	12%
6244	Child Day Care Services	40,583	45,515	4,932	12%
5412	Accounting, Tax Prep. Bookkeeping, Payroll Services	23,753	28,669	4,916	21%
8121	Personal Care Services	16,124	20,851	4,727	29%

Source: EMSI Complete Employment - 2011.3

Projected Growth

Similar to the analysis conducted on the historic growth, Camoin Associates looked at projections provided by EMSI to see what industries are expected to grow over the next ten years. These projections are based on historic local and national trends as well as the current economic climate and the most up-to-date projections for the future.

It is important to note here that while construction is showing large projected growth over the next 10 years, it is clear that the recent growth of the construction industry has been largely driven by construction at Fort Drum. According to local stakeholders interviewed for this project, construction activities at the post and post related construction in the community is actually expected to slow in the coming years. As such, it is expected that this industry will not grow as quickly as expressed in the table and may even experience negative growth.

Fastest Growing Industries in Jefferson County 2011-2021 (2-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
62	Health Care and Social Assistance	7,467	8,949	1,482	20%
90	Government	28,427	29,540	1,113	4%
23	Construction	3,285	3,848	563	17%
53	Real Estate and Rental and Leasing	2,073	2,576	503	24%
52	Finance and Insurance	1,867	2,295	428	23%
72	Accommodation and Food Services	4,269	4,602	333	8%
48-49	Transportation and Warehousing	2,248	2,578	330	15%
81	Other Services (except Public Administration)	2,513	2,834	321	13%
56	Administrative, Support and Remediation Services	1,888	2,161	273	14%
54	Professional, Scientific, and Technical Services	1,577	1,764	187	12%
71	Arts, Entertainment, and Recreation	878	1,006	128	15%
51	Information	857	965	108	13%
61	Educational Services	381	463	82	22%
31-33	Manufacturing	2,599	2,679	80	3%
21	Mining, Quarrying, and Oil and Gas Extraction	163	226	63	39%
22	Utilities	208	206	(2)	(1%)
42	Wholesale Trade	1,170	1,147	(23)	(2%)
11	Agriculture, Forestry, Fishing and Hunting	1,484	1,335	(149)	(10%)
55	Management of Companies and Enterprises	199	31	(168)	(84%)
44-45	Retail Trade	7,873	7,436	(437)	(6%)
	Total	71,425	76,642	5,217	7%

Source: EMSI Complete Employment - 2011.3

Fastest Growing Industries in Economic Region 2011-2021 (2-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
62	Health Care and Social Assistance	54,403	64,997	10,594	19%
90	Government	83,616	88,130	4,514	5%
72	Accommodation and Food Services	27,806	30,044	2,238	8%
52	Finance and Insurance	22,594	24,520	1,926	9%
54	Professional, Scientific, and Technical Services	23,253	25,128	1,875	8%
71	Arts, Entertainment, and Recreation	8,217	9,998	1,781	22%
53	Real Estate and Rental and Leasing	13,023	14,789	1,766	14%
81	Other Services (except Public Administration)	18,192	19,902	1,710	9%
61	Educational Services	15,932	16,811	879	6%
56	Administrative, Support and Remediation Services	21,480	21,845	365	2%
23	Construction	19,647	20,010	363	2%
42	Wholesale Trade	16,237	16,399	162	1%
51	Information	6,045	6,204	159	3%
55	Management of Companies and Enterprises	3,001	3,133	132	4%
21	Mining, Quarrying, and Oil and Gas Extraction	624	752	128	21%
48-49	Transportation and Warehousing	14,920	14,896	(24)	0%
11	Agriculture, Forestry, Fishing and Hunting	5,249	4,931	(318)	(6%)
22	Utilities	3,947	3,580	(367)	(9%)
44-45	Retail Trade	44,955	43,839	(1,116)	(2%)
31-33	Manufacturing	28,211	23,079	(5,132)	(18%)
	Total	431,352	452,987	21,635	5%

Source: EMSI Complete Employment - 2011.3

Fastest Growing Industries in Upstate NY 2011-2021 (2-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
62	Health Care and Social Assistance	503,009	577,454	74,445	15%
53	Real Estate and Rental and Leasing	130,494	156,379	25,885	20%
54	Professional, Scientific, and Technical Services	226,517	252,194	25,677	11%
52	Finance and Insurance	186,628	212,012	25,384	14%
90	Government	618,636	634,741	16,105	3%
61	Educational Services	153,934	168,823	14,889	10%
71	Arts, Entertainment, and Recreation	86,386	100,633	14,247	16%
56	Administrative, Support and Remediation Services	173,077	186,495	13,418	8%
72	Accommodation and Food Services	244,322	256,432	12,110	5%
81	Other Services (except Public Administration)	163,420	173,657	10,237	6%
21	Mining, Quarrying, and Oil and Gas Extraction	15,288	21,378	6,090	40%
23	Construction	167,241	172,554	5,313	3%
42	Wholesale Trade	113,741	117,760	4,019	4%
55	Management of Companies and Enterprises	46,068	48,555	2,487	5%
51	Information	57,719	58,826	1,107	2%
48-49	Transportation and Warehousing	111,856	111,242	(614)	(1%)
22	Utilities	14,646	13,997	(649)	(4%)
11	Agriculture, Forestry, Fishing and Hunting	59,455	57,406	(2,049)	(3%)
44-45	Retail Trade	416,555	408,393	(8,162)	(2%)
31-33	Manufacturing	290,657	251,886	(38,771)	(13%)
	Total	3,779,649	3,980,817	201,168	5%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Industries in Jefferson County 2011-2021 (4-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
9110	Federal government, civilian, except postal service	3,068	3,784	716	23%
5312	Offices of Real Estate Agents and Brokers	666	981	315	47%
5239	Other Financial Investment Activities	549	861	312	57%
6211	Offices of Physicians	1,053	1,353	300	28%
6241	Individual and Family Services	798	1,098	300	38%
6232	Residential Mental Retardation, Mental Health Facilities	503	800	297	59%
9300	Local government	6,652	6,919	267	4%
2361	Residential Building Construction	768	1,014	246	32%
6244	Child Day Care Services	1,014	1,260	246	24%
5313	Activities Related to Real Estate	565	766	201	36%
3256	Soap, Cleaning Compound Manufacturing	344	517	173	50%
7222	Limited-Service Eating Places	1,575	1,742	167	11%
7221	Full-Service Restaurants	1,829	1,976	147	8%
6212	Offices of Dentists	336	475	139	41%
4529	Other General Merchandise Stores	743	870	127	17%
5614	Business Support Services	795	922	127	16%
6231	Nursing Care Facilities	709	825	116	16%
5617	Services to Buildings and Dwellings	580	693	113	19%
6213	Offices of Other Health Practitioners	312	420	108	35%
7139	Other Amusement and Recreation Industries	486	592	106	22%
3399	Other Miscellaneous Manufacturing	141	238	97	69%
4931	Warehousing and Storage	169	265	96	57%
5242	Agencies, Brokerages, Insurance Related Activities	581	665	84	14%
5413	Architectural, Engineering, and Related Services	283	367	84	30%
2382	Building Equipment Contractors	642	723	84	5%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Industries in Economic Region 2011-2021 (4-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
9300	Local government	44,271	46,940	2,669	6%
6211	Offices of Physicians	7,788	10,208	2,420	31%
5239	Other Financial Investment Activities	5,060	7,436	2,376	47%
6231	Nursing Care Facilities	6,955	8,757	1,802	26%
6241	Individual and Family Services	6,329	8,118	1,789	28%
5312	Offices of Real Estate Agents and Brokers	3,829	5,351	1,522	40%
4529	Other General Merchandise Stores	3,746	5,240	1,494	40%
5416	Management, Scientific, and Tech Consulting Services	3,433	4,760	1,327	39%
7222	Limited-Service Eating Places	9,594	10,920	1,326	14%
7139	Other Amusement and Recreation Industries	4,164	5,399	1,235	30%
6244	Child Day Care Services	5,321	6,483	1,162	22%
9200	State government	15,224	16,190	966	6%
9110	Federal government, civilian, except postal service	5,909	6,740	831	14%
5313	Activities Related to Real Estate	3,413	4,197	784	23%
6213	Offices of Other Health Practitioners	3,045	3,819	774	25%
2361	Residential Building Construction	3,095	3,755	660	21%
6212	Offices of Dentists	2,231	2,845	614	28%
5617	Services to Buildings and Dwellings	5,359	5,972	613	11%
5413	Architectural, Engineering, and Related Services	4,437	5,040	603	14%
6232	Residential Mental Retardation, Mental Health Facilities	1,898	2,495	597	31%
5614	Business Support Services	2,770	3,331	561	20%
7223	Special Food Services	2,312	2,838	526	23%
8121	Personal Care Services	2,387	2,907	520	22%
6116	Other Schools and Instruction	1,718	2,224	506	29%
4931	Warehousing and Storage	1,905	2,387	482	25%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Industries in Upstate NY 2011-2021 (4-Digit)					
NAICS	Description	Jobs 2011	Jobs 2021	Change	% Change
5239	Other Financial Investment Activities	50,544	71,461	20,917	41%
5312	Offices of Real Estate Agents and Brokers	39,037	53,063	14,026	36%
6211	Offices of Physicians	59,948	73,279	13,331	22%
6231	Nursing Care Facilities	55,075	67,824	12,749	23%
6241	Individual and Family Services	49,339	61,772	12,433	25%
9300	Local government	398,333	409,973	11,640	3%
4529	Other General Merchandise Stores	32,644	43,066	10,422	32%
5313	Activities Related to Real Estate	34,584	44,583	9,999	29%
5416	Management, Scientific, and Tech Consulting Services	29,325	39,324	9,999	34%
6113	Colleges, Universities, and Professional Schools	98,487	107,997	9,510	10%
6232	Residential Mental Retardation, Mental Health Facilities	33,056	41,772	8,716	26%
7222	Limited-Service Eating Places	81,207	88,848	7,641	9%
6213	Offices of Other Health Practitioners	28,437	34,897	6,460	23%
7139	Other Amusement and Recreation Industries	34,564	40,939	6,375	18%
5614	Business Support Services	28,192	34,564	6,372	23%
2111	Oil and Gas Extraction	9,525	15,679	6,154	65%
5617	Services to Buildings and Dwellings	47,244	53,216	5,972	13%
5419	Other Professional, Scientific, and Technical Services	41,766	47,475	5,709	14%
6244	Child Day Care Services	45,515	51,053	5,538	12%
8121	Personal Care Services	20,851	25,824	4,973	24%
6116	Other Schools and Instruction	19,003	23,820	4,817	25%
5415	Computer Systems Design and Related Services	30,887	34,918	4,031	13%
9200	State government	156,587	160,552	3,965	3%
5231	Securities & Commodity Contracts Intermediation	13,020	16,877	3,857	30%
6239	Other Residential Care Facilities	8,672	12,407	3,735	43%

Source: EMSI Complete Employment - 2011.3

Location Quotient Analysis

Once the largest and fastest growing industries have been identified, the next step is to evaluate the competitive strengths of these industries.

A Location Quotient Analysis (LQ) is used to compare trends in one region to a larger reference region according to certain characteristics or assets of the region. **It is essentially a way of quantifying how concentrated a particular industry, demographic group, or other variable is in a region as compared to the state or nation.** Location quotients are one way to identify unique characteristics of a particular region. For this report, employment by industry within Jefferson County is compared to New York State and the U.S. to identify which industries might be more concentrated in Jefferson County. In other words, the LQ can help determine whether Jefferson County has a larger share of jobs within a particular industry as compared to the state or nation.²

LQ is calculated by dividing the percent of jobs within each industry by the percent of jobs in the same industry in the larger geography. For example, if the *Finance and Insurance* industry accounts for 2% of jobs in a community and at the national level this industry has 1% of the total jobs, the community has an LQ of 2.0 ($0.02 \div 0.01 = 2$). So in this example, the *Finance and Insurance* industry has a larger share of employment compared to the nation. It employs twice as many individuals as expected. **Typically, only values above 1.20 or below 0.80 are considered “significant” findings for an LQ analysis.**

Significant industries with a high LQ and high employment are considered the foundation of an area’s economy because it is assumed in an ‘average’ economy local industries are fulfilling local needs first and therefore those with a high LQ must be producing a surplus to local needs. Industries that have a high concentration are assumed to produce more than what is needed locally (i.e. a surplus) and export their products and services rather than circulating money already in the region. These are known as export-oriented industries and they bring wealth into the local economy. By looking at LQ trends over time it is possible to determine which industries are becoming more concentrated and which industries are becoming less concentrated.

Highly concentrated industries in Jefferson County in 2011, as compared to the State, include agriculture, forestry, fishing and hunting (agriculture industry); government; and mining quarrying and oil and gas extraction (mining industry). The concentration of the agriculture industry declined from 2001 to 2011 and is expected to continue to do so through 2021. However, it will likely maintain a relatively high state LQ of 3.5 in 2021.

The LQ analysis of the Economic Region tells a slightly different story. Industries currently with a significant LQ compared to the State include utilities; agriculture, forestry, fishing and hunting; manufacturing; and government. The concentration of the utilities industry spiked in 2011 at 2.49 but is expected to decline over the next 10 years to 2.40. The State LQ’s of both the agriculture and manufacturing industries are expected to remain relatively constant with a modest decline through 2021. Regional industries with high concentrations relative to the nation include utilities; educational services; and government. Both utilities and educational services are projected to experience a decline of their national LQ’s over the next 10 years, but still remain significant.

² Note: For the State LQ analysis, Jefferson County industries are compared to the state as a whole, not the Upstate region study area defined elsewhere in this report.

Most Concentrated Industries by State LQ in Jefferson County (2-Digit)					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
11	Agriculture, Forestry, Fishing and Hunting	1,484	4.31	3.50	3.25
90	Government	28,427	2.67	3.01	3.04
21	Mining, Quarrying, and Oil and Gas Extraction	163	2.11	1.50	1.50
44-45	Retail Trade	7,873	1.24	1.18	1.11
23	Construction	3,285	0.95	1.11	1.26
72	Accommodation and Food Services	4,269	1.15	0.99	0.99
48-49	Transportation and Warehousing	2,248	0.76	0.90	1.03
31-33	Manufacturing	2,599	0.76	0.83	0.99
22	Utilities	208	1.24	0.79	0.82
81	Other Services (except Public Administration)	2,513	0.88	0.76	0.78
62	Health Care and Social Assistance	7,467	0.81	0.73	0.75
53	Real Estate and Rental and Leasing	2,073	0.54	0.61	0.64
56	Administrative Support and Remediation Services	1,888	0.30	0.53	0.56
42	Wholesale Trade	1,170	0.48	0.48	0.47
51	Information	857	0.41	0.45	0.51
71	Arts, Entertainment, and Recreation	878	0.52	0.43	0.43
52	Finance and Insurance	1,867	0.36	0.36	0.41
54	Professional, Scientific, and Technical Services	1,577	0.29	0.28	0.27
55	Management of Companies and Enterprises	199	1.29	0.21	0.03
61	Educational Services	381	0.13	0.13	0.14

Source: EMSI Complete Employment - 2011.3

Most Concentrated Industries by National LQ in Jefferson County (2-Digit)					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
90	Government	28,427	2.70	2.92	2.92
44-45	Retail Trade	7,873	1.09	1.09	1.03
11	Agriculture, Forestry, Fishing and Hunting	1,484	1.30	1.05	1.01
62	Health Care and Social Assistance	7,467	1.09	0.94	0.97
23	Construction	3,285	0.71	0.89	0.99
48-49	Transportation and Warehousing	2,248	0.75	0.88	0.98
72	Accommodation and Food Services	4,269	0.94	0.85	0.86
22	Utilities	208	1.39	0.85	0.84
53	Real Estate and Rental and Leasing	2,073	0.61	0.68	0.73
81	Other Services (except Public Administration)	2,513	0.81	0.67	0.71
51	Information	857	0.58	0.65	0.70
71	Arts, Entertainment, and Recreation	878	0.67	0.56	0.56
31-33	Manufacturing	2,599	0.52	0.51	0.56
52	Finance and Insurance	1,867	0.53	0.49	0.53
42	Wholesale Trade	1,170	0.49	0.46	0.44
56	Administrative, Support and Remediation Services	1,888	0.26	0.44	0.44
54	Professional, Scientific, and Technical Services	1,577	0.35	0.32	0.31
21	Mining, Quarrying, and Oil and Gas Extraction	163	0.40	0.27	0.29
55	Management of Companies and Enterprises	199	1.39	0.24	0.04
61	Educational Services	381	0.23	0.22	0.23

Source: EMSI Complete Employment - 2011.3

Most Concentrated Industries by State LQ in Economic Region (2-Digit)					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
22	Utilities	3,947	3.30	2.49	2.40
11	Agriculture, Forestry, Fishing and Hunting	5,249	2.06	2.05	2.03
31-33	Manufacturing	28,211	1.43	1.49	1.44
90	Government	83,616	1.34	1.47	1.53
44-45	Retail Trade	44,955	1.14	1.12	1.11
42	Wholesale Trade	16,237	1.08	1.11	1.14
23	Construction	19,647	1.08	1.10	1.11
72	Accommodation and Food Services	27,806	1.12	1.06	1.09
56	Administrative and Support and Waste Management	21,480	0.77	0.99	0.96
48-49	Transportation and Warehousing	14,920	0.88	0.99	1.01
21	Mining, Quarrying, and Oil and Gas Extraction	624	1.40	0.96	0.85
81	Other Services (except Public Administration)	18,192	1.01	0.91	0.93
61	Educational Services	15,932	1.03	0.90	0.86
62	Health Care and Social Assistance	54,403	0.87	0.89	0.92
52	Finance and Insurance	22,594	0.67	0.73	0.73
54	Professional, Scientific, and Technical Services	23,253	0.63	0.67	0.66
71	Arts, Entertainment, and Recreation	8,217	0.62	0.67	0.72
53	Real Estate and Rental and Leasing	13,023	0.64	0.64	0.62
55	Management of Companies and Enterprises	3,001	0.84	0.53	0.54
51	Information	6,045	0.59	0.52	0.55

Source: EMSI Complete Employment - 2011.3

Most Concentrated Industries by National LQ in Economic Region (2-Digit)					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
22	Utilities	3,947	3.70	2.68	2.48
61	Educational Services	15,932	1.80	1.53	1.43
90	Government	83,616	1.36	1.42	1.47
62	Health Care and Social Assistance	54,403	1.16	1.13	1.19
42	Wholesale Trade	16,237	1.11	1.07	1.06
44-45	Retail Trade	44,955	1.01	1.03	1.02
52	Finance and Insurance	22,594	0.99	0.98	0.95
48-49	Transportation and Warehousing	14,920	0.86	0.96	0.95
31-33	Manufacturing	28,211	0.97	0.93	0.82
72	Accommodation and Food Services	27,806	0.92	0.92	0.95
23	Construction	19,647	0.81	0.88	0.87
71	Arts, Entertainment, and Recreation	8,217	0.79	0.87	0.95
56	Administrative and Support and Waste Management	21,480	0.67	0.82	0.76
81	Other Services (except Public Administration)	18,192	0.92	0.81	0.85
54	Professional, Scientific, and Technical Services	23,253	0.76	0.77	0.75
51	Information	6,045	0.83	0.75	0.76
53	Real Estate and Rental and Leasing	13,023	0.73	0.70	0.71
11	Agriculture, Forestry, Fishing and Hunting	5,249	0.62	0.61	0.63
55	Management of Companies and Enterprises	3,001	0.91	0.61	0.63
21	Mining, Quarrying, and Oil and Gas Extraction	624	0.26	0.17	0.16

Source: EMSI Complete Employment - 2011.3

At the 4-digit NAICS code level, each of the top twenty-five industries has a significant LQ for both the state and national analysis. Therefore, when considering LQ's for particular industries, it is important to also look at the number of jobs within the industry. For example, in Jefferson County in 2011 support activities for mining had a state LQ of 2.31; however, this industry only has 17 jobs.

Top performing non-government industries in Jefferson County with a significant state LQ include soap, cleaning compound manufacturing³; crop and animal production; other general merchandise stores; and nonresidential building construction.

Significant national LQ top performing non-government industries include soap, cleaning compound manufacturing; other transit and ground passenger transportation; residential mental retardation and mental health facilities; business support services; nonresidential building construction; residential building construction; other residential care facilities; and vocational rehabilitation services. Each of these industries is showing a positive trend in LQ from 2001 to 2021.

An additional observation about the LQ data for both Jefferson County and the Economic Region is that there is a vast diversity of manufacturing industries with significant LQ's that seem to be either increasing or holding steady. This may suggest that while many manufacturing industries are declining throughout the state and country, these industries are at least maintaining their presence locally.

Top 25 Most Concentrated Industries by State LQ in Jefferson County (4-Digit) - Sorted by 2011 LQ					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
9120	Federal government, military	17,074	33.47	46.38	46.06
3365	Railroad Rolling Stock Manufacturing	312	20.65	26.90	56.61
3212	Wood Product Manufacturing	43	9.78	9.66	9.85
3256	Soap, Cleaning Compound Manufacturing	344	5.29	8.49	16.00
3221	Pulp, Paper, and Paperboard Mills	262	14.72	7.53	2.15
9110	Federal government, civilian, except postal service	3,068	5.78	6.63	8.34
1141	Fishing	49	5.59	5.32	5.49
3115	Dairy Product Manufacturing	269	3.85	5.16	6.63
3353	Electrical Equipment Manufacturing	137	12.32	4.52	2.24
3273	Cement and Concrete Product Manufacturing	151	3.22	4.23	6.46
11A0	Crop and animal production	1,233	4.63	3.72	6.11
3262	Rubber Product Manufacturing	59	0.00	3.60	3.45
1151	Support Activities for Crop Production	88	3.29	3.47	6.66
3391	Medical Equipment and Supplies Manufacturing	305	2.85	3.03	3.41
3111	Animal Food Manufacturing	27	3.96	2.68	3.29
1133	Logging	62	1.87	2.66	2.70
4412	Other Motor Vehicle Dealers	112	3.27	2.66	2.31
3241	Petroleum and Coal Products Manufacturing	32	1.01	2.65	4.54
4471	Gasoline Stations	466	2.09	2.39	2.46
4246	Chemical Products Merchant Wholesalers	88	2.43	2.35	2.08
2131	Support Activities for Mining	17	0.00	2.31	2.01
4529	Other General Merchandise Stores	743	1.32	2.20	2.17
2362	Nonresidential Building Construction	542	0.88	2.19	3.09
8113	Machinery, Equipment Repair and Maintenance	94	0.94	2.03	2.80
3324	Boiler, Tank, & Shipping Container Manufacturing	56	0.00	2.02	0.00

Source: EMSI Complete Employment - 2011.3

³ Note that Car-Fresh Corp (manufacturer of Little Trees Air Fresheners) is listed under this NAICS code (NAICS 3256) which is resulting in the high location quotient.

Top 25 Most Concentrated Industries by National LQ in Jefferson County (4-Digit) - Sorted by 2011 LQ					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
3365	Railroad Rolling Stock Manufacturing	312	29.74	40.54	32.98
9120	Federal government, military	17,074	14.77	20.33	21.04
3256	Soap, Cleaning Compound Manufacturing	344	6.11	7.66	11.74
3221	Pulp, Paper, and Paperboard Mills	262	9.82	5.78	1.68
3115	Dairy Product Manufacturing	269	3.82	4.89	6.05
9110	Federal government, civilian, except postal service	3,068	3.51	3.45	4.29
4859	Other Transit & Ground Passenger Transportation	151	0.37	3.19	2.87
3353	Electrical Equipment Manufacturing	137	5.69	2.35	1.23
3391	Medical Equipment and Supplies Manufacturing	305	2.42	2.31	2.07
4854	School and Employee Bus Transportation	186	1.44	2.26	1.97
3273	Cement and Concrete Product Manufacturing	151	1.45	2.08	2.93
6232	Residential Mental Retardation, Mental Health Fac.	503	0.85	1.94	2.75
5151	Radio and Television Broadcasting	183	1.70	1.73	1.87
4872	Scenic and Sightseeing Transportation, Water	17	3.73	1.72	2.13
5614	Business Support Services	795	0.26	1.70	1.79
2362	Nonresidential Building Construction	542	0.71	1.69	1.77
4246	Chemical Products Merchant Wholesalers	88	2.02	1.69	1.21
2361	Residential Building Construction	768	1.04	1.58	1.98
6239	Other Residential Care Facilities	113	1.19	1.56	2.06
3212	Plywood, & Eng. Wood Product Manufacturing	43	1.23	1.55	2.26
4412	Other Motor Vehicle Dealers	112	1.94	1.53	1.18
3324	Boiler, Tank, & Shipping Container Manufacturing	56	0.00	1.52	1.10
8134	Civic and Social Organizations	266	1.77	1.52	1.87
6243	Vocational Rehabilitation Services	218	0.82	1.44	1.33
1141	Fishing	49	1.49	1.43	1.54

Source: EMSI Complete Employment - 2011.3

Top 25 Most Concentrated Industries by State LQ in Economic Region (4-Digit) - Sorted by 2011 LQ					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
9120	Federal government, military	18,212	5.44	8.19	8.31
3334	HVAC & Comm. Refrigeration Equ. Manufacturing	1,094	11.66	7.53	1.91
3313	Alumina and Aluminum Production & Processing	684	7.86	7.50	13.05
3221	Pulp, Paper, and Paperboard Mills	1,159	13.90	5.51	4.64
3314	Nonferrous Metal Production and Processing	845	9.32	5.07	5.66
3315	Foundries	306	6.29	4.52	3.77
3365	Railroad Rolling Stock Manufacturing	312	3.74	4.45	9.58
1153	Support Activities for Forestry	180	4.13	4.05	4.23
1142	Hunting and Trapping	50	2.97	3.87	3.74
3222	Converted Paper Product Manufacturing	1,553	3.21	3.59	3.88
1133	Logging	487	3.27	3.47	3.35
3353	Electrical Equipment Manufacturing	555	2.62	3.04	3.29
3345	Navig. Measuring, Elec. & Control Inst. Man.	2,656	3.73	2.97	2.57
2211	Electric Power Gen. Transmission & Distribution	3,629	4.25	2.89	2.73
3363	Motor Vehicle Parts Manufacturing	1,296	2.40	2.86	3.12
3371	House & Inst. Furniture & Kitchen Cabinet Man.	856	3.63	2.85	2.08
4542	Vending Machine Operators	487	2.00	2.82	3.54
2372	Land Subdivision	185	2.47	2.82	4.28
3359	Other Electrical Equipment and Component Man.	592	1.59	2.72	2.34
3115	Dairy Product Manufacturing	855	2.00	2.72	2.37
4841	General Freight Trucking	3,618	3.34	2.69	2.69
3212	Plywood, and Engineered Wood Product Man.	72	2.61	2.65	2.73
3121	Beverage Manufacturing	684	1.97	2.64	2.10
4881	Support Activities for Air Transportation	748	2.35	2.48	4.69
4238	Machinery, Equip. & Supplies Wholesalers	2,112	4.13	2.39	2.07

Source: EMSI Complete Employment - 2011.3

Top 25 Most Concentrated Industries by National LQ in Economic Region (4-Digit) - Sorted by 2011 LQ					
NAICS	Description	Jobs 2011	LQ 2001	LQ 2011	LQ 2021
3365	Railroad Rolling Stock Manufacturing	312	4.28	6.71	5.58
3314	Nonferrous Metal Production and Processing	845	3.86	5.48	5.39
3313	Alumina and Aluminum Production and Processing	684	5.14	4.82	7.16
3221	Pulp, Paper, and Paperboard Mills	1,159	4.20	4.23	3.61
9120	Federal government, military	18,212	2.40	3.59	3.80
2211	Electric Power Gen. Transmission & Distribution	3,629	5.01	3.52	3.24
3334	HVAC & Comm. Refrigeration Equ. Manufacturing	1,094	7.55	3.33	0.51
6113	Colleges, Universities, and Professional Schools	11,858	2.93	2.70	2.55
3115	Dairy Product Manufacturing	855	3.31	2.58	2.16
4542	Vending Machine Operators	487	1.15	2.55	4.67
3345	Navig. Measuring, Elec. & Control Inst. Man.	2,656	1.93	2.54	2.10
6112	Junior Colleges	449	0.59	2.32	3.03
3222	Converted Paper Product Manufacturing	1,553	1.88	2.18	1.64
5629	Other Waste Management Services	730	2.27	2.10	2.01
4859	Other Transit & Ground Passenger Transportation	575	1.63	2.01	1.92
1153	Support Activities for Forestry	180	1.06	2.00	2.58
3359	Other Electrical Equipment & Component Man.	592	2.28	1.91	1.46
5241	Insurance Carriers	5,648	2.13	1.88	1.64
8112	Elec. and Precision Equip. Repair & Maintenance	715	1.28	1.87	2.11
4248	Alcoholic Beverage Merchant Wholesalers	811	1.42	1.87	2.31
3256	Soap, Cleaning Compound, Manufacturing	495	1.23	1.83	2.70
4244	Grocery and Related Product Wholesalers	3,316	1.90	1.75	1.73
6242	Food & Housing, Emergency Relief Services	733	1.75	1.74	1.54
4854	School and Employee Bus Transportation	847	1.87	1.71	1.52
1133	Logging	487	1.61	1.67	1.83

Source: EMSI Complete Employment - 2011.3

Occupational 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 is 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.

Largest Occupations - All Occupations

The first occupational dataset shows the top twenty occupations at the 5-digit SOC code level ranked by the number of jobs in 2011. The 5-digit level includes such occupations as teacher’s assistants, registered nurses, military occupations, and truck drivers.

The 2011 median earnings for each occupation are also provided, calculated by the median hourly earnings (from EMSI) multiplied by 2,080 hours. These figures are used to identify the wage ranges of the largest occupational categories to determine if the employment base of a community is composed primarily of high-, medium, or low-wage jobs.

Teaching is also an important occupational group in Jefferson County; however, the SOC classifies these occupations in such detail that they do not make the Top 25 at the 5-digit level. In total, the education, training, and library occupations category at the 2-digit SOC level includes over 3,220 jobs (the 5th largest group at the 2-digit level). The top five occupations at the 5-digit level include teachers’ assistants (621 jobs); elementary school teachers, except special education (522 jobs); teachers and instructors - all other (438 jobs); secondary school teachers, except special education and vocational education (394 jobs); and postsecondary teachers (383 jobs).

Top 25 Occupations in Jefferson County				
SOC	Description	Jobs 2011	Median Earnings	% of Total Workforce
55-9999	Military Occupations	17,074	\$45,178	23.90%
41-2031	Retail salespersons	1,834	\$19,157	2.57%
41-2011	Cashiers, except gaming	1,609	\$17,410	2.25%
39-9011	Child care workers	1,146	\$15,350	1.60%
37-2011	Janitors and cleaners	869	\$22,027	1.22%
29-1111	Registered nurses	859	\$53,373	1.20%
35-3021	Combined food preparation and serving workers	846	\$15,579	1.18%
43-5081	Stock clerks and order fillers	832	\$18,366	1.16%
41-1011	First-line supervisors/managers of retail sales workers	825	\$25,501	1.16%
43-6014	Secretaries, except legal, medical, and executive	796	\$28,725	1.11%
47-2031	Carpenters	759	\$34,986	1.06%
11-9012	Farmers and ranchers	755	\$15,080	1.06%
43-4051	Customer service representatives	750	\$19,490	1.05%
43-3031	Bookkeeping, accounting, and auditing clerks	738	\$29,994	1.03%
35-3031	Waiters and waitresses	737	\$18,574	1.03%
43-9061	Office clerks, general	712	\$23,067	1.00%
41-9022	Real estate sales agents	685	\$16,494	0.96%
33-3012	Correctional officers and jailers	676	\$52,666	0.95%
31-1011	Home health aides	648	\$21,694	0.91%
25-9041	Teacher assistants	621	\$25,792	0.87%
53-3032	Truck drivers, heavy and tractor-trailer	595	\$30,472	0.83%
35-2021	Food preparation workers	562	\$17,410	0.79%
49-9042	Maintenance and repair workers, general	561	\$31,803	0.79%
11-9199	Managers, all other	550	\$28,163	0.77%
53-7062	Laborers & freight, stock, and material movers, hand	528	\$26,666	0.74%

Source: EMSI Complete Employment - 2011.3

Note: Median earnings derived from median hourly earnings times 2080 hours.

Top 25 Occupations in Economic Region				
SOC	Description	Jobs 2011	Median Earnings	% of Total Workforce
55-9999	Military Occupations	18,212	\$44,158	4.22%
41-2011	Cashiers, except gaming	9,847	\$17,243	2.28%
41-2031	Retail salespersons	9,075	\$19,781	2.10%
37-2011	Janitors and cleaners	7,780	\$22,090	1.80%
29-1111	Registered nurses	7,249	\$55,744	1.68%
43-9061	Office clerks, general	6,848	\$24,710	1.59%
43-6014	Secretaries, except legal, medical, and executive	6,681	\$29,453	1.55%
25-1099	Postsecondary teachers	6,657	\$86,445	1.54%
43-3031	Bookkeeping, accounting, and auditing clerks	6,215	\$32,115	1.44%
43-4051	Customer service representatives	6,177	\$29,203	1.43%
35-3021	Combined food prep & serving workers, inc. fast food	6,054	\$16,723	1.40%
43-5081	Stock clerks and order fillers	5,953	\$18,970	1.38%
25-9041	Teacher assistants	5,929	\$28,621	1.37%
39-9011	Child care workers	5,846	\$16,328	1.36%
53-3032	Truck drivers, heavy and tractor-trailer	5,036	\$35,610	1.17%
35-3031	Waiters and waitresses	4,598	\$18,866	1.07%
41-4012	Sales reps. wholesale & manu, ex. tech & sci.	4,550	\$49,483	1.05%
41-1011	First-line supervisors/managers of retail sales workers	4,485	\$26,707	1.04%
41-9022	Real estate sales agents	4,203	\$16,848	0.97%
31-1012	Nursing aides, orderlies, and attendants	4,201	\$23,109	0.97%
53-7062	Laborers & freight, stock, & material movers, hand	4,196	\$24,565	0.97%
43-1011	First-line supervisors of office support workers	4,015	\$46,530	0.93%
25-2021	Elementary school teachers, ex. special education	4,009	\$68,744	0.93%
43-6011	Executive secretaries and administrative assistants	3,966	\$40,310	0.92%
31-1011	Home health aides	3,855	\$22,110	0.89%

Source: EMSI Complete Employment - 2011.3

Note: Median earnings derived from median hourly earnings times 2080 hours.

Historic Growth - All Occupations

To determine which occupations are experiencing the highest growth rate, the past and anticipated change in employment (i.e. increase in the number of jobs) is provided by EMSI for 2001 to 2011 and 2011 to 2021. This information is provided at the 5-digit SOC code level.

Top 25 Fastest Growing Occupations in Jefferson County 2001-2011					
SOC	Description	Jobs 2001	Jobs 2011	Change	% Change
55-9999	Military Occupations	11,252	17,074	5,822	52%
41-2031	Retail salespersons	1,487	1,834	347	23%
41-9022	Real estate sales agents	348	685	337	97%
31-1011	Home health aides	325	648	323	99%
43-4051	Customer service representatives	451	750	299	66%
39-9011	Child care workers	900	1,146	246	27%
11-9141	Property, real estate managers	212	411	199	94%
47-2031	Carpenters	565	759	194	34%
35-3021	Combined food preparation and serving workers	658	846	188	29%
41-9041	Telemarketers	34	221	187	550%
39-9021	Personal and home care aides	235	412	177	75%
41-2011	Cashiers, except gaming	1,458	1,609	151	10%
13-1041	Compliance officers, except agriculture, construction	302	436	134	44%
53-3022	Bus drivers, school	282	408	126	45%
35-3031	Waiters and waitresses	622	737	115	18%
37-3011	Landscaping and groundskeeping workers	241	352	111	46%
41-9021	Real estate brokers	108	215	107	99%
47-2061	Construction laborers	357	459	102	29%
13-2052	Personal financial advisors	162	262	100	62%
11-9199	Managers, all other	455	550	95	21%
41-3021	Insurance sales agents	208	294	86	41%
43-5081	Stock clerks and order fillers	747	832	85	11%
33-9032	Security guards	133	216	83	62%
41-3031	Securities, commodities, sales agents	114	196	82	72%
41-1012	First-line supervisors of non-retail sales workers	235	305	70	30%

Source: EMSI Complete Employment - 2011.3

Top 30 Fastest Growing Occupations in Economic Region 2001-2011					
SOC	Description	Jobs 2001	Jobs 2011	Change	% Change
55-9999	Military Occupations	12,708	18,212	5,504	43%
31-1011	Home health aides	2,427	3,855	1,428	59%
13-2052	Personal financial advisors	1,477	2,861	1,384	94%
41-9022	Real estate sales agents	2,893	4,203	1,310	45%
39-9011	Child care workers	4,562	5,846	1,284	28%
35-3021	Combined food preparation and serving workers, includ	4,842	6,054	1,212	25%
39-9021	Personal and home care aides	1,946	2,962	1,016	52%
41-3031	Securities, commodities, & financial services sales	1,287	2,264	977	76%
11-9141	Property, real estate, and community association man	1,735	2,550	815	47%
29-1111	Registered nurses	6,552	7,249	697	11%
11-9199	Managers, all other	2,976	3,640	664	22%
31-1012	Nursing aides, orderlies, and attendants	3,616	4,201	585	16%
13-1111	Management analysts	1,637	2,094	457	28%
25-3099	Teachers and instructors, all other	3,098	3,516	418	13%
41-9021	Real estate brokers	890	1,298	408	46%
29-1069	Physicians and surgeons	2,093	2,458	365	17%
41-1012	First-line supervisors of non-retail sales workers	2,027	2,362	335	17%
43-4051	Customer service representatives	5,855	6,177	322	5%
29-2061	Licensed practical and licensed vocational nurses	2,694	3,013	319	12%
39-9031	Fitness trainers and aerobics instructors	456	770	314	69%
25-2021	Elementary school teachers, except special education	3,716	4,009	293	8%
13-2051	Financial analysts	774	1,063	289	37%
39-5012	Hairdressers, hairstylists, and cosmetologists	1,230	1,518	288	23%
27-4021	Photographers	1,755	2,023	268	15%
25-1099	Postsecondary teachers	6,401	6,657	256	4%

Source: EMSI Complete Employment - 2011.3

Projected Growth - All Occupations

Camoin Associates also used EMSI data to look at projections from 2011 to 2021.

Top 25 Fastest Growing Occupations in Jefferson County 2011-2021					
SOC	Description	Jobs 2011	Jobs 2021	Change	% Change
31-1011	Home health aides	648	961	313	48%
39-9011	Child care workers	1,146	1,405	259	23%
41-9022	Real estate sales agents	685	913	228	33%
13-1041	Compliance officers, except agriculture, construction	436	617	181	42%
43-4051	Customer service representatives	750	910	160	21%
39-9021	Personal and home care aides	412	555	143	35%
11-9141	Real estate, and community association managers	411	549	138	34%
35-3021	Food preparation & serving workers, including fast food	846	981	135	16%
47-2031	Carpenters	759	894	135	18%
13-2052	Personal financial advisors	262	397	135	52%
11-9199	Managers, all other	550	663	113	21%
47-2061	Construction laborers	459	562	103	22%
37-3011	Landscaping and groundskeeping workers	352	453	101	29%
41-3031	Securities, commodities, services sales agents	196	293	97	49%
39-6011	Baggage porters and bellhops	157	247	90	57%
29-1111	Registered nurses	859	940	81	9%
41-9021	Real estate brokers	215	287	72	33%
31-9091	Dental assistants	150	221	71	47%
41-1012	First-line supervisors of non-retail sales workers	305	371	66	22%
41-3021	Insurance sales agents	294	360	66	22%
29-1069	Physicians and surgeons	351	415	64	18%
21-1093	Social and human service assistants	213	276	63	30%
25-3099	Teachers and instructors, all other	438	500	62	14%
47-1011	First-line supervisors of construction trades	305	365	60	20%
51-9023	Mixing machine setters, operators, & tenders	123	180	57	46%

Source: EMSI Complete Employment - 2011.3

Top 25 Fastest Growing Occupations in Economic Region 2011-2021					
SOC	Description	Jobs 2011	Jobs 2021	Change	% Change
31-1011	Home health aides	3,855	5,263	1,408	37%
13-2052	Personal financial advisors	2,861	4,098	1,237	43%
39-9011	Child care workers	5,846	7,045	1,199	21%
35-3021	Combined food prep. and serving workers, inc. fast food	6,054	7,177	1,123	19%
39-9021	Personal and home care aides	2,962	3,978	1,016	34%
29-1111	Registered nurses	7,249	8,217	968	13%
41-3031	Securities, commodities, & financial serv. sales agents	2,264	3,112	848	37%
41-9022	Real estate sales agents	4,203	5,050	847	20%
31-1012	Nursing aides, orderlies, and attendants	4,201	4,929	728	17%
25-1099	Postsecondary teachers	6,657	7,292	635	10%
11-9199	Managers, all other	3,640	4,254	614	17%
11-9141	Property & community association managers	2,550	3,088	538	21%
43-4051	Customer service representatives	6,177	6,691	514	8%
29-1069	Physicians and surgeons	2,458	2,957	499	20%
29-2061	Licensed practical and licensed vocational nurses	3,013	3,480	467	15%
25-2021	Elementary school teachers, except special education	4,009	4,391	382	10%
41-1012	First-line supervisors of non-retail sales workers	2,362	2,743	381	16%
13-1111	Management analysts	2,094	2,463	369	18%
39-9031	Fitness trainers and aerobics instructors	770	1,137	367	48%
25-9041	Teacher assistants	5,929	6,251	322	5%
39-5012	Hairdressers, hairstylists, and cosmetologists	1,518	1,837	319	21%
13-1041	Compliance officers, ex: ag. const. H&S, and trans.	1,051	1,366	315	30%
37-3011	Landscaping and groundskeeping workers	2,439	2,745	306	13%
13-2051	Financial analysts	1,063	1,345	282	27%
31-9091	Dental assistants	755	1,021	266	35%

Source: EMSI Complete Employment - 2011.3

Key Industry Identification & Occupation Analysis

The next step in the analysis is to identify key industries in Jefferson County to research in greater detail with respect to associated occupational trends and requirements. Key industries are defined as those that were highlighted in the interviews with key stakeholders (interview summaries included later in this Supplement); have positive trends as shown in the industry data analysis above; are well-aligned with the greater economic regions; are primarily export-based industries; and/or play a key role in supporting other important industry sectors (see table below).

Top Performing Industry Matrix								
NAICS	Industry	Interviews	Large	Growing	LQ	Regional Alignment	Export Industry	Support Industry
11	Agriculture, Forestry, Fishing and Hunting	X	X		X	X		
31-33	Manufacturing	X	X		X	X	X	
44-45	Retail Trade		X	X		X	X	
48	Transportation		X	X	X	X	X	X
51	Information						X	X
52-53	Finance & Insurance/Real Estate Rental & Leasing		X	X		X	X	
54	Professional, Scientific, and Technical Services							X
56142	Telephone Call Centers		X	X	X	X	X	X
62	Health Care and Social Assistance	X	X	X	X	X	X	
72	Accommodation and Food Services	X	X	X		X		

Source: Camoin Associates

Agriculture, Forestry, Fishing and Hunting (NAICS 11)

Several of the stakeholders interviewed for the CEDS identified the agricultural industry as having significant potential opportunities for growth and expansion. The following tables contain top occupations associated with agriculture, forestry, fishing, and hunting industry (NAICS code 11).

Top occupations by number of current jobs in this industry include farmers; miscellaneous agricultural workers; and farm, ranch, and other agricultural managers. The number of jobs in each of these three industries is projected to decline over the next ten years both within the agriculture industry and overall in the County.

Other occupations important to the agriculture, forestry, fishing, and hunting industry include bookkeeping, accounting, and auditing clerks; nonfarm animal caretakers; and truck drivers. Each of these occupations has around 15 jobs in the agriculture industry; however, they have from 30 to 100 jobs in the County overall throughout all industries. Of the top occupations in the agriculture industry, these occupations are projected to add the most jobs in the County and remain at a relatively stable level of employment in the industry (in other words, jobs in these occupations are being added in other industries in the County, but are not being added to the agriculture industry).

Jefferson County's soils and climate are conducive to dairy farming and the County has a niche in the production and manufacturing of dairy products. Other potential opportunities identified during the interviews include grape, hops, beef, organic farming, and commodity crops (soybeans, wheat, corn, etc.). Many of these opportunities are driven by the increasing demand for locally grown and raised products.

Agriculture, Forestry, Fishing and Hunting Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
11-9012	Farmers and ranchers	725	732	99.0%
45-209A	Miscellaneous agricultural workers	264	271	97.4%
11-9011	Farm, ranch, and other agricultural managers	156	157	99.4%
45-3011	Fishers and related fishing workers	51	53	96.2%
39-2011	Animal trainers	26	42	61.9%
45-1099	Supervisors, farming, fishing, and forestry workers	24	26	92.3%
45-4022	Logging equipment operators	22	23	95.7%
39-2021	Nonfarm animal caretakers	17	110	15.5%
43-3031	Bookkeeping, accounting, and auditing clerks	15	745	2.0%
53-3032	Truck drivers, heavy and tractor-trailer	11	593	1.9%
45-4021	Fallers	10	11	90.9%

Source: EMSI

Agriculture, Forestry, Fishing and Hunting Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-3031	Bookkeeping, accounting, and auditing clerks	15	14	-1	745	778	33	113
39-2021	Nonfarm animal caretakers	17	17	0	110	118	8	30
53-3032	Truck drivers, heavy and tractor-trailer	11	12	1	593	597	4	103
45-4022	Logging equipment operators	22	25	3	23	26	3	8
39-2011	Animal trainers	51	52	1	42	44	2	10
45-1099	Supervisors, farming, fishing, and forestry workers	24	26	2	26	28	2	8
45-3011	Fishers and related fishing workers	26	26	0	53	55	2	14
45-4021	Fallers	10	11	1	11	12	1	4
11-9011	Farm, ranch, and other agricultural managers	156	149	-7	157	150	-7	29
45-209A	Miscellaneous agricultural workers	264	248	-16	271	256	-15	67
11-9012	Farmers and ranchers	725	631	-94	732	639	-93	42

Source: EMSI

Agriculture, Forestry, Fishing and Hunting Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
11-9011	Farm, ranch, and other agricultural managers	\$13.46	\$18.73	3	7	Degree plus work experience
11-9012	Farmers and ranchers	\$7.25	\$8.39	5	7	Long-term on-the-job training
39-2011	Animal trainers	\$8.20	\$11.93	1	0	Moderate-term on-the-job training
39-2021	Nonfarm animal caretakers	\$9.71	\$13.64	3	0	Short-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
45-1099	Supervisors, farming, fishing, and forestry workers	\$13.26	\$17.51	1	7	Work experience in a related field
45-209A	Miscellaneous agricultural workers	\$13.01	\$9.25	7	7	Short-term on-the-job training
45-3011	Fishers and related fishing workers	\$7.26	\$8.90	2	0	Moderate-term on-the-job training
45-4021	Fallers	--	\$15.80	0	0	Moderate-term on-the-job training
45-4022	Logging equipment operators	\$8.16	\$16.58	1	0	Moderate-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	\$14.65	\$18.66	11	0	Short-term on-the-job training

Source: EMSI

Manufacturing (NAICS 31-33)

Although manufacturing is not one of the largest industry sectors by employment, it is the second largest export industry in the County, making it a vital component of the County's economic base.

The top occupation by size in the manufacturing industry is team assemblers, which has 163 jobs in the manufacturing industry and 194 jobs in the County as a whole. The overall number of team assemblers is expected to remain relatively constant over the next ten years; however, it is expected that there will be approximately fifty openings⁴ during this time period. Team assemblers in Jefferson County earn approximately \$10.68 an hour, which is slightly less than their national counterparts who receive around \$12.00 an hour. For reference, the average wage in Jefferson County as a whole is \$16.02 an hour. The second-largest occupation by size is mixing and blending machine setters, operators, and tenders, which has 120 jobs in the manufacturing industry and 127 jobs in the County all together. This occupation is the third fastest-growing occupation, expected to add over 50 jobs through 2012 with 72 openings overall.

Other top occupations in the manufacturing industry include first line supervisors; inspectors, testers, sorters, samplers, and weighers; packing and filling machine operators; and paper goods machine setters. With the exception of paper goods machine setters, which is expected to lose almost 40 jobs by 2021, the total number of jobs in these occupations is expected to stay constant with about 20 openings over the next ten years.

Education requirements for most of the top manufacturing occupations in Jefferson County require varying degrees of on-the-job training. Management level positions typically also require work experience in a related field.

⁴ "ppenings" refers to the sum of new and replacement jobs in the occupation.

One manufacturing businesses that is just getting started in Jefferson County and is not yet represented in the data is Florelle Tissue Corp. This paper company just began hiring in early 2012 and is expected to employ at least 50 employees by the end of the year and 75 people by 2014.

Examples of employers for the manufacturing industry include: New York Air Brake Corp, Car-Freshener, Knowlton Technologies, Climax Manufacturing Co, and Fibermark.

Manufacturing Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
51-2092	Team assemblers	163	194	84.0%
51-9023	Mixing and blending machine setters, operators, and tenders	120	127	94.5%
51-1011	First-line supervisors/managers of production and operating workers	84	132	63.6%
53-3032	Truck drivers, heavy and tractor-trailer	80	593	13.5%
49-9042	Maintenance and repair workers, general	77	568	13.6%
51-9061	Inspectors, testers, sorters, samplers, and weighers	69	105	65.7%
51-9111	Packaging and filling machine operators and tenders	67	79	84.8%
51-9196	Paper goods machine setters, operators, and tenders	63	64	98.4%
53-7062	Laborers and freight, stock, and material movers, hand	63	531	11.9%
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	54	326	16.6%
51-9081	Dental laboratory technicians	53	58	91.4%
43-5071	Shipping, receiving, and traffic clerks	49	228	21.5%
49-9041	Industrial machinery mechanics	48	88	54.5%
51-9198	Helpers--Production workers	46	56	82.1%
53-7064	Packers and packagers, hand	46	158	29.1%
51-6031	Sewing machine operators	44	54	81.5%
51-4121	Welders, cutters, solderers, and brazers	41	74	55.4%
51-2022	Electrical and electronic equipment assemblers	40	43	93.0%
53-7051	Industrial truck and tractor operators	40	106	37.7%
51-4041	Machinists	39	57	68.4%
11-9199	Managers, all other	38	570	6.7%
43-3031	Bookkeeping, accounting, and auditing clerks	37	745	5.0%
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	36	39	92.3%
43-5081	Stock clerks and order fillers	30	833	3.6%
11-1021	General and operations managers	29	414	7.0%
51-3092	Food batchmakers	29	34	85.3%
51-9012	Separating, filtering, clarifying, precipitating, and still machine setters, operators, and tenders	28	30	93.3%
43-4051	Customer service representatives	28	781	3.6%
49-3043	Rail car repairers	26	28	92.9%
43-9061	Office clerks, general	26	721	3.6%

Source: EMSI

Manufacturing Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-4051	Customer service representatives	28	35	7	781	910	129	341
11-9199	Managers, all other	38	38	0	570	663	93	221
51-9023	Mixing and blending machine setters, operators, and tenders	120	172	52	127	180	53	72
43-9061	Office clerks, general	26	28	2	721	761	40	127
49-9042	Maintenance and repair workers, general	77	75	-2	568	605	37	116
43-3031	Bookkeeping, accounting, and auditing clerks	37	41	4	745	778	33	113
51-9111	Packaging and filling machine operators and tenders	67	80	13	79	92	13	25
49-9041	Industrial machinery mechanics	48	51	3	88	100	12	23
51-3092	Food batchmakers	29	36	7	34	42	8	15
51-2092	Team assemblers	163	171	8	194	201	7	47
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	54	62	8	326	333	7	74
51-6031	Sewing machine operators	44	53	9	54	61	7	10
51-9012	Separating, filtering, clarifying, precipitating, and still machine setters, operators, and tenders	28	33	5	30	36	6	8
53-3032	Truck drivers, heavy and tractor-trailer	80	103	23	593	597	4	103
51-1011	First-line supervisors/managers of production and operating workers	84	85	1	132	135	3	20
51-9061	Inspectors, testers, sorters, samplers, and weighers	69	67	-2	105	106	1	17
53-7051	Industrial truck and tractor operators	40	40	0	106	107	1	29
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	36	35	-1	39	39	0	10
51-9198	Helpers--Production workers	46	43	-3	56	53	-3	9
51-4041	Machinists	39	34	-5	57	54	-3	7
51-9081	Dental laboratory technicians	53	48	-5	58	54	-4	10
51-4121	Welders, cutters, solderers, and brazers	41	32	-9	74	69	-5	21
53-7064	Packers and packagers, hand	46	51	5	158	152	-6	24
49-3043	Rail car repairers	26	16	-10	28	18	-10	5
53-7062	Laborers and freight, stock, and material movers, hand	63	62	-1	531	520	-11	154
11-1021	General and operations managers	29	29	0	414	401	-13	108
51-2022	Electrical and electronic equipment assemblers	40	26	-14	43	29	-14	7
43-5071	Shipping, receiving, and traffic clerks	49	49	0	228	210	-18	51
43-5081	Stock clerks and order fillers	30	31	1	833	803	-30	172
51-9196	Paper goods machine setters, operators, and tenders	63	24	-39	64	25	-39	14

Source: EMSI

Manufacturing Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
11-9199	Managers, all other	\$13.54	\$21.04	25	56	Work experience in a related field
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	\$19.77	\$24.52	8	0	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	38	0	Moderate-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	\$11.45	\$13.57	6	1	Short-term on-the-job training
43-5081	Stock clerks and order fillers	\$8.83	\$10.09	19	0	Short-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training
49-3043	Rail car repairers	\$14.88	\$22.25	1	0	Long-term on-the-job training
49-9041	Industrial machinery mechanics	\$17.85	\$21.48	3	0	Long-term on-the-job training
49-9042	Maintenance and repair workers, general	\$15.29	\$16.00	13	0	Moderate-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	\$22.19	\$24.65	2	0	Work experience in a related field
51-2022	Electrical and electronic equipment assemblers	\$10.18	\$13.76	1	0	Short-term on-the-job training
51-2092	Team assemblers	\$10.68	\$12.96	5	0	Moderate-term on-the-job training
51-3092	Food batchmakers	\$9.04	\$11.77	2	0	Short-term on-the-job training
51-4041	Machinists	\$15.67	\$18.06	1	0	Long-term on-the-job training
51-4121	Welders, cutters, solderers, and brazers	\$14.92	\$17.31	2	0	Postsecondary vocational award
51-6031	Sewing machine operators	\$7.73	\$9.90	1	0	Moderate-term on-the-job training
51-9012	Separating, filtering, clarifying, precipitating, and still machine setters, operators, and tenders	\$13.29	\$18.07	1	0	Moderate-term on-the-job training
51-9023	Mixing and blending machine setters, operators, and tenders	\$13.88	\$15.43	8	0	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	\$13.98	\$15.82	2	0	Moderate-term on-the-job training
51-9081	Dental laboratory technicians	\$14.54	\$17.16	1	0	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	\$9.93	\$12.08	3	0	Short-term on-the-job training
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	\$13.63	\$13.93	1	0	Moderate-term on-the-job training
51-9196	Paper goods machine setters, operators, and tenders	\$13.68	\$16.36	2	0	Moderate-term on-the-job training
51-9198	Helpers--Production workers	\$10.53	\$10.76	1	0	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	\$14.65	\$18.66	11	0	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	\$13.41	\$14.21	3	0	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	\$12.82	\$11.06	17	0	Short-term on-the-job training
53-7064	Packers and packagers, hand	\$12.36	\$9.36	3	0	Short-term on-the-job training

Source: EMSI

Information (NAICS 51)

The information industry is an important supporter of some of the other top industries in the County. For example the health care industry is benefiting from a significant investment in the regional fiber network to expand the use of IT in healthcare. The information industry is also an important supporter to the telephone call center industry.

The top five largest occupations in the information industry are a mix of installers and media-related announcers and correspondents (the focus here is on the technical portion of the industry). The occupation expected to grow the fastest in the industry include telecommunications line installers (expected to add 16 jobs with over 30 openings).

Wages in almost every occupation are below their national counterparts. For the most part, JCC does not currently offer programs that directly relate to the more specific/highly technical information technology occupations.

Examples of regional businesses in the information technology industry include: Westelcom, Verizon Wireless, and TDS Telecom.

Information Technology Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
49-9052	Telecommunications line installers and repairers	82	105	78.1%
27-3011	Radio and television announcers	71	79	89.9%
41-3011	Advertising sales agents	53	61	86.9%
27-3022	Reporters and correspondents	47	51	92.2%
43-4051	Customer service representatives	37	781	4.7%
49-2022	Telecommunications equipment installers and repairers, except line installers	26	36	72.2%
41-9091	Door-to-door sales workers, news and street vendors, and related workers	24	407	5.9%
27-3041	Editors	23	34	67.6%
51-5023	Printing machine operators	23	63	36.5%
27-4012	Broadcast technicians	18	20	90.0%
43-9061	Office clerks, general	15	721	2.1%
15-1081	Network systems and data communications analysts	14	56	25.0%
11-9199	Managers, all other	14	570	2.5%
27-1024	Graphic designers	14	65	21.5%
43-3031	Bookkeeping, accounting, and auditing clerks	12	745	1.6%
41-3099	Sales representatives, services, all other	11	71	15.5%
27-4021	Photographers	10	216	4.6%
11-1021	General and operations managers	10	414	2.4%
27-3043	Writers and authors	10	79	12.7%

Source: EMSI

Information Technology Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-4051	Customer service representatives	37	48	11	781	910	129	341
11-9199	Managers, all other	14	16	2	570	663	93	221
43-9061	Office clerks, general	15	17	2	721	761	40	127
43-3031	Bookkeeping, accounting, and auditing clerks	12	14	2	745	778	33	113
27-4021	Photographers	10	<10	-	216	234	18	56
49-9052	Telecommunications line installers and repairers	82	98	16	105	122	17	31
27-3011	Radio and television announcers	71	87	16	79	96	17	36
15-1081	Network systems and data communications analysts	14	20	6	56	70	14	23
51-5023	Printing machine operators	23	25	2	63	74	11	23
27-1024	Graphic designers	14	16	2	65	76	11	28
41-3011	Advertising sales agents	53	60	7	61	70	9	20
49-2022	Telecommunications equipment installers and repairers, except line installers	26	32	6	36	43	7	13
41-3099	Sales representatives, services, all other	11	13	2	71	78	7	23
27-3043	Writers and authors	10	10	0	79	84	5	19
27-3022	Reporters and correspondents	47	50	3	51	54	3	17
27-3041	Editors	23	25	2	34	37	3	11
27-4012	Broadcast technicians	18	17	-1	20	20	0	6
11-1021	General and operations managers	10	<10	-	414	401	-13	108
41-9091	Door-to-door sales workers, news and street vendors, and related workers	24	37	13	407	390	-17	67

Source: EMSI

Top Information Technology Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
11-9199	Managers, all other	\$13.54	\$21.04	25	56	Work experience in a related field
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
15-1081	Network systems and data communications analysts	\$20.42	\$27.99	3	2	Bachelor's degree
27-	Graphic designers	\$12.67	\$17.89	3	0	Bachelor's degree
27-3011	Radio and television announcers	\$9.86	\$11.60	4	0	Long-term on-the-job training
27-3022	Reporters and correspondents	\$14.46	\$13.46	2	0	Bachelor's degree
27-	Editors	\$17.92	\$19.44	1	0	Bachelor's degree
27-	Writers and authors	\$8.84	\$9.23	2	0	Bachelor's degree
27-	Broadcast technicians	\$13.73	\$16.76	1	0	Associate's degree
27-4021	Photographers	\$8.56	\$14.87	6	0	Long-term on-the-job training
41-3011	Advertising sales agents	\$16.79	\$20.84	2	0	Moderate-term on-the-job training
41-3099	Sales representatives, services, all other	\$14.77	\$21.87	3	0	Work experience in a related field
41-9091	Door-to-door sales workers, news and street vendors, and related workers	\$7.25	\$7.28	7	0	Short-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	38	0	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training
49-2022	Telecommunications equipment installers and repairers, except line installers	\$16.63	\$24.41	1	0	Postsecondary vocational award
49-9052	Telecommunications line installers and repairers	\$30.37	\$22.16	3	0	Long-term on-the-job training
51-5023	Printing machine operators	\$15.21	\$15.68	3	0	Moderate-term on-the-job training

Source: EMSI

Retail Trade (NAICS 44-45)

Jefferson County's retail industry is one of its largest industries by employment and it has experienced very positive growth in the last ten years. It is also the fourth-largest export industry in the County.

The top three occupations in this industry include retail sales persons; cashiers; and first line supervisors/managers of retail sales workers. The total number of jobs in each of these occupations is expected to decline over the next ten years; however, due to the high turnover rate of these positions, there is expected to be over 160 openings for retail managers, over 460 openings for retail salespersons, and over 650 openings for cashiers in the County. Most positions in the retail industry require on-the-job training.

Examples of employers in this industry include: Wal-mart, Price Chopper, Target, and Sears.

Retail Trade Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
41-2031	Retail salespersons	1,774	1,845	96.2%
41-2011	Cashiers, except gaming	1,403	1,617	86.8%
41-1011	First-line supervisors/managers of retail sales workers	785	829	94.7%
43-5081	Stock clerks and order fillers	656	833	78.8%
41-9091	Door-to-door sales workers, news and street vendors, and related workers	377	407	92.6%
49-3023	Automotive service technicians and mechanics	233	465	50.1%
53-7062	Laborers and freight, stock, and material movers, hand	143	531	26.9%
43-3031	Bookkeeping, accounting, and auditing clerks	117	745	15.7%
53-3033	Truck drivers, light or delivery services	96	306	31.4%
43-4051	Customer service representatives	92	781	11.8%
35-2021	Food preparation workers	92	566	16.3%
43-5071	Shipping, receiving, and traffic clerks	82	228	36.0%
43-1011	First-line supervisors/managers of office and administrative support workers	79	434	18.2%
41-2022	Parts salespersons	78	95	82.1%
43-9061	Office clerks, general	76	721	10.5%
11-1021	General and operations managers	75	414	18.1%
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	73	871	8.4%
29-2052	Pharmacy technicians	68	89	76.4%
29-1051	Pharmacists	68	99	68.7%
53-7064	Packers and packagers, hand	63	158	39.9%
35-3021	Combined food preparation and serving workers, including fast food	56	868	6.5%
53-3032	Truck drivers, heavy and tractor-trailer	45	593	7.6%
43-6014	Secretaries, except legal, medical, and executive	44	803	5.5%
27-1023	Floral designers	42	44	95.5%
49-3093	Tire repairers and changers	41	47	87.2%
53-7061	Cleaners of vehicles and equipment	36	161	22.4%
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	35	189	18.5%
51-3011	Bakers	33	71	46.5%
31-9095	Pharmacy aides	31	34	91.2%
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	31	326	9.5%

Source: EMSI

Retail Trade Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-4051	Customer service representatives	92	95	3	781	910	129	341
35-3021	Combined food preparation and serving workers, including fast food	56	56	0	868	981	113	275
43-9061	Office clerks, general	76	69	-7	721	761	40	127
43-3031	Bookkeeping, accounting, and auditing clerks	117	109	-8	745	778	33	113
27-1023	Floral designers	42	72	30	44	74	30	42
43-1011	First-line supervisors/managers of office and administrative support workers	79	71	-8	434	454	20	107
35-2021	Food preparation workers	92	94	2	566	576	10	191
29-2052	Pharmacy technicians	68	75	7	89	99	10	30
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	35	30	-5	189	197	8	52
43-6014	Secretaries, except legal, medical, and executive	44	36	-8	803	810	7	106
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	31	29	-2	326	333	7	74
29-1051	Pharmacists	68	71	3	99	104	5	24
53-3032	Truck drivers, heavy and tractor-trailer	45	41	-4	593	597	4	103
51-3011	Bakers	33	33	0	71	73	2	19
53-3033	Truck drivers, light or delivery services	96	97	1	306	307	1	51
53-7061	Cleaners of vehicles and equipment	36	29	-7	161	162	1	53
49-3093	Tire repairers and changers	41	38	-3	47	45	-2	9
53-7064	Packers and packagers, hand	63	55	-8	158	152	-6	24
31-9095	Pharmacy aides	31	27	-4	34	28	-6	3
53-7062	Laborers and freight, stock, and material movers, hand	143	125	-18	531	520	-11	154
41-2022	Parts salespersons	78	68	-10	95	84	-11	31
11-1021	General and operations managers	75	63	-12	414	401	-13	108
41-9091	Door-to-door sales workers, news and street vendors, and related workers	377	348	-29	407	390	-17	67
43-5071	Shipping, receiving, and traffic clerks	82	69	-13	228	210	-18	51
41-1011	First-line supervisors/managers of retail sales workers	785	764	-21	829	809	-20	162
49-3023	Automotive service technicians and mechanics	233	193	-40	465	443	-22	80
43-5081	Stock clerks and order fillers	656	619	-37	833	803	-30	172
41-2011	Cashiers, except gaming	1,403	1,362	-41	1,617	1,577	-40	655
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	73	62	-11	871	831	-40	148
41-2031	Retail salespersons	1,774	1,709	-65	1,845	1,786	-59	465

Source: EMSI

Top Retail Trade Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completion	Educational Level
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
27-1023	Floral designers	\$10.43	\$9.56	5	0	Short-term on-the-job training
29-1051	Pharmacists	\$54.10	\$52.30	3	0	First professional degree
29-2052	Pharmacy technicians	\$14.04	\$13.50	3	0	Moderate-term on-the-job training
31-9095	Pharmacy aides	\$8.61	\$9.97	0	0	Short-term on-the-job training
35-2021	Food preparation workers	\$8.37	\$9.17	21	0	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	\$7.49	\$8.42	31	0	Short-term on-the-job training
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	\$10.59	\$10.22	16	0	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	\$12.26	\$14.49	18	0	Work experience in a related field
41-2011	Cashiers, except gaming	\$8.37	\$8.88	73	0	Short-term on-the-job training
41-2022	Parts salespersons	\$13.02	\$13.77	3	0	Moderate-term on-the-job training
41-2031	Retail salespersons	\$9.21	\$9.63	52	0	Short-term on-the-job training
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	\$19.77	\$24.52	8	0	Work experience in a related field
41-9091	Door-to-door sales workers, news and street vendors, and related workers	\$7.25	\$7.28	7	0	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	12	0	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	38	0	Moderate-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	\$11.45	\$13.57	6	1	Short-term on-the-job training
43-5081	Stock clerks and order fillers	\$8.83	\$10.09	19	0	Short-term on-the-job training
43-6014	Secretaries, except legal, medical, and executive	\$13.81	\$14.04	12	13	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training
49-1011	First-line supervisors/ managers of mechanics, installers, and repairers	\$24.42	\$27.72	6	0	Work experience in a related field
49-3023	Automotive service technicians and mechanics	\$13.33	\$18.17	9	0	Postsecondary vocational award
49-3093	Tire repairers and changers	\$11.14	\$11.80	1	0	Short-term on-the-job training
51-3011	Bakers	\$10.30	\$11.70	2	0	Long-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	\$14.65	\$18.66	11	0	Short-term on-the-job training
53-3033	Truck drivers, light or delivery services	\$11.39	\$13.96	6	0	Short-term on-the-job training
53-7061	Cleaners of vehicles and equipment	\$10.41	\$10.28	6	0	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	\$12.82	\$11.06	17	0	Short-term on-the-job training
53-7064	Packers and packagers, hand	\$12.36	\$9.36	3	0	Short-term on-the-job training

Source: EMSI

Support Activities for Transportation (NAICS 488)

Based on some feedback received during the interviews with key stakeholders and findings from the industry data analysis, there may be some potential to grow the transportation industry as it relates to support activities. To research this possibility further, occupations in this industry have been identified and shown in the tables below.

The top occupation with over 50 jobs in this industry is laborers and freight, stock, and material movers. Cargo and freight agents are the second largest occupation with 48 jobs. Aircraft mechanics and service technicians, transportation inspectors, and reservation and transportation ticket agents and clerks round out the top five occupations (each have over 20 jobs in the industry). Most of the occupations in this industry require on-the-job training or a postsecondary vocational award.

Local economic development officials suggest that the County is well-positioned to grow in these industries due to proximity to Canada and access to the I-81 corridor and regional transportation systems.

Support Activities for Transportation Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
53-7062	Laborers and freight, stock, and material movers, hand	54	531	10.2%
43-5011	Cargo and freight agents	48	55	87.3%
49-3011	Aircraft mechanics and service technicians	39	53	73.6%
53-6051	Transportation inspectors	36	115	31.3%
43-4181	Reservation and transportation ticket agents and travel clerks	22	36	61.1%
43-4051	Customer service representatives	21	781	2.7%
49-9042	Maintenance and repair workers, general	19	568	3.3%
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	16	871	1.8%
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	16	189	8.5%
39-6032	Transportation attendants, except flight attendants and baggage porters	15	19	78.9%
53-7061	Cleaners of vehicles and equipment	12	161	7.5%
43-3031	Bookkeeping, accounting, and auditing clerks	11	745	1.5%
33-9032	Security guards	<10	224	-
49-9043	Maintenance workers, machinery	<10	24	-
43-9061	Office clerks, general	<10	721	-
11-1021	General and operations managers	<10	414	-
53-2012	Commercial pilots	<10	19	-
43-1011	First-line supervisors/managers of office and administrative support workers	<10	434	-
49-2091	Avionics technicians	<10	12	-
49-3023	Automotive service technicians and mechanics	<10	465	-
43-5071	Shipping, receiving, and traffic clerks	<10	228	-
53-3032	Truck drivers, heavy and tractor-trailer	<10	593	-
43-5081	Stock clerks and order fillers	<10	833	-
43-6014	Secretaries, except legal, medical, and executive	<10	803	-
53-6099	Transportation workers, all other	<10	8	-

Source: EMSI

Support Activities for Transportation Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-4051	Customer service representatives	21	32	11	781	910	129	341
43-9061	Office clerks, general	<10	13	-	721	761	40	127
53-6051	Transportation inspectors	36	57	21	115	153	38	61
49-9042	Maintenance and repair workers, general	19	28	9	568	605	37	116
33-9032	Security guards	<10	14	-	224	258	34	74
43-3031	Bookkeeping, accounting, and auditing clerks	11	15	4	745	778	33	113
43-1011	First-line supervisors/managers of office and administrative support workers	<10	12	-	434	454	20	107
43-5011	Cargo and freight agents	48	62	14	55	69	14	25
49-3011	Aircraft mechanics and service technicians	39	51	12	53	67	14	23
43-4181	Reservation and transportation ticket agents and travel clerks	22	33	11	36	48	12	19
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	16	23	7	189	197	8	52
39-6032	Transportation attendants, except flight attendants and baggage porters	15	22	7	19	26	7	11
43-6014	Secretaries, except legal, medical, and executive	<10	<10	-	803	810	7	106
49-9043	Maintenance workers, machinery	<10	15	-	24	30	6	10
53-6099	Transportation workers, all other	<10	11	-	8	14	6	--
53-2012	Commercial pilots	<10	14	-	19	23	4	10
49-2091	Avionics technicians	<10	14	-	12	16	4	7
53-3032	Truck drivers, heavy and tractor-trailer	<10	<10	-	593	597	4	103
53-7061	Cleaners of vehicles and equipment	12	17	5	161	162	1	53
53-7062	Laborers and freight, stock, and material movers, hand	54	70	16	531	520	-11	154
11-1021	General and operations managers	<10	11	-	414	401	-13	108
43-5071	Shipping, receiving, and traffic clerks	<10	<10	-	228	210	-18	51
49-3023	Automotive service technicians and mechanics	<10	12	-	465	443	-22	80
43-5081	Stock clerks and order fillers	<10	11	-	833	803	-30	172
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	16	22	6	871	831	-40	148

Source: EMSI

Support Activities for Transportation Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
33-9032	Security guards	\$15.25	\$11.21	8	0	Short-term on-the-job training
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	\$10.59	\$10.22	16	0	Short-term on-the-job training
39-6032	Transportation attendants, except flight attendants and baggage porters	--	\$10.13	1	0	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	12	0	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	38	0	Moderate-term on-the-job training
43-4181	Reservation and transportation ticket agents and travel clerks	\$14.54	\$14.77	2	17	Short-term on-the-job training
43-5011	Cargo and freight agents	\$19.56	\$17.78	3	1	Moderate-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	\$11.45	\$13.57	6	1	Short-term on-the-job training
43-5081	Stock clerks and order fillers	\$8.83	\$10.09	19	0	Short-term on-the-job training
43-6014	Secretaries, except legal, medical, and executive	\$13.81	\$14.04	12	13	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	\$24.42	\$27.72	6	0	Work experience in a related field
49-2091	Avionics technicians	--	\$24.31	1	0	Postsecondary vocational award
49-3011	Aircraft mechanics and service technicians	\$14.76	\$25.38	3	0	Postsecondary vocational award
49-3023	Automotive service technicians and mechanics	\$13.33	\$18.17	9	0	Postsecondary vocational award
49-9042	Maintenance and repair workers, general	\$15.29	\$16.00	13	0	Moderate-term on-the-job training
49-9043	Maintenance workers, machinery	\$17.31	\$18.48	1	0	Moderate-term on-the-job training
53-2012	Commercial pilots	\$40.17	\$30.84	1	0	Postsecondary vocational award
53-3032	Truck drivers, heavy and tractor-trailer	\$14.65	\$18.66	11	0	Short-term on-the-job training
53-6051	Transportation inspectors	\$25.45	\$26.67	7	0	Work experience in a related field
53-6099	Transportation workers, all other	--	\$15.34	--	0	Short-term on-the-job training
53-7061	Cleaners of vehicles and equipment	\$10.41	\$10.28	6	0	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	\$12.82	\$11.06	17	0	Short-term on-the-job training

Source: EMSI

Finance & Insurance/Real Estate Rental & Leasing (NAICS 52-53)

The finance and insurance/real estate rental and leasing industry is one of the largest industries in the County and it has experienced some growth in many of the industry subsectors over the past few years.

Real estate agent is the top occupation, which EMSI suggests has over 700 jobs currently and is expected to grow by 185 jobs by 2021. There is high turnover in this occupation, with approximately 285 job openings annually. Educational requirements for real estate agents typically include a post-secondary vocational award. The second largest occupation in this industry - property, real estate, and community association managers - is expected to be the third fastest growing. There are currently over 400 people with jobs in this occupation in the County and it expected to add over 100 in the next ten years (with 50 openings annually). This occupation typically requires a Bachelor's degree.

The third and fourth largest occupations include insurance sales agents and personal financial advisors. They each have around 300 jobs in the County as a whole. It is expected that there will be a need for an additional 55 insurance sales agents and over 100 personal financial advisors by 2012. Another occupation that is projected to add a significant number of jobs is the securities, commodities, and financial services sales agents. This occupation is projected to grow by 80 jobs and have over 130 openings in the next ten years.

Examples of businesses in this industry group include: Fort Drum Mountain Community Homes, Northern Federal Credit Union, and Watertown Savings Bank.

Finance & Insurance/Real Estate Rental & Leasing Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
41-9022	Real estate sales agents	718	728	98.6%
11-9141	Property, real estate, and community association managers	419	437	95.9%
41-3021	Insurance sales agents	304	305	99.7%
13-2052	Personal financial advisors	278	285	97.5%
41-9021	Real estate brokers	228	229	99.6%
41-3031	Securities, commodities, and financial services sales agents	211	213	99.1%
43-3071	Tellers	205	208	98.6%
41-1012	First-line supervisors/managers of non-retail sales workers	151	318	47.5%
49-9042	Maintenance and repair workers, general	112	568	19.7%
43-4051	Customer service representatives	102	781	13.1%
13-2021	Appraisers and assessors of real estate	89	131	67.9%
11-3031	Financial managers	71	159	44.7%
13-2051	Financial analysts	68	89	76.4%
43-3031	Bookkeeping, accounting, and auditing clerks	67	745	9.0%
11-9199	Managers, all other	57	570	10.0%
43-9061	Office clerks, general	56	721	7.8%
43-6014	Secretaries, except legal, medical, and executive	55	803	6.8%
43-1011	First-line supervisors/managers of office and administrative support workers	48	434	11.1%
43-4141	New accounts clerks	46	47	97.9%
41-2021	Counter and rental clerks	43	80	53.8%
13-2072	Loan officers	42	51	82.4%
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	40	871	4.6%
13-2011	Accountants and auditors	39	333	11.7%
43-6011	Executive secretaries and administrative assistants	35	322	10.9%
11-1011	Chief executives	33	173	19.1%

Source: EMSI

Finance & Insurance/Real Estate Rental & Leasing Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
41-9022	Real estate sales agents	718	900	225	728	913	185	285
43-4051	Customer service representatives	102	105	4	781	910	129	341
11-9141	Property, real estate, and community association managers	419	526	132	437	549	112	175
13-2052	Personal financial advisors	278	389	134	285	397	112	137
11-9199	Managers, all other	57	72	18	570	663	93	221
41-3031	Securities, commodities, and financial services sales agents	211	292	98	213	293	80	134
41-9021	Real estate brokers	228	286	71	229	287	58	90
41-3021	Insurance sales agents	304	359	67	305	360	55	116
41-1012	First-line supervisors/managers of non-retail sales workers	151	196	55	318	371	53	110
43-9061	Office clerks, general	56	59	4	721	761	40	127
49-9042	Maintenance and repair workers, general	112	115	5	568	605	37	116
43-3031	Bookkeeping, accounting, and auditing clerks	67	72	6	745	778	33	113
13-2011	Accountants and auditors	39	48	11	333	358	25	75
13-2021	Appraisers and assessors of real estate	89	108	24	131	155	24	44
11-3031	Financial managers	71	91	25	159	183	24	49
13-2051	Financial analysts	68	92	29	89	113	24	38
43-6011	Executive secretaries and administrative assistants	35	37	3	322	345	23	61
43-1011	First-line supervisors/managers of office and administrative support workers	48	47	0	434	454	20	107
11-1011	Chief executives	33	41	10	173	184	11	55
43-6014	Secretaries, except legal, medical, and executive	55	52	-3	803	810	7	106
13-2072	Loan officers	42	48	7	51	58	7	12
41-2021	Counter and rental clerks	43	42	-1	80	77	-3	19
43-4141	New accounts clerks	46	39	-8	47	41	-6	12
43-3071	Tellers	205	186	-21	208	188	-20	78
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	40	36	-4	871	831	-40	148

Source: EMSI

Finance & Insurance/Real Estate Rental & Leasing Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC	Educational Level
11-3031	Financial managers	\$25.53	\$37.61	49	0	Degree plus work experience
11-9141	Property, real estate, and community association managers	\$7.71	\$9.49	175	0	Bachelor's degree
11-9199	Managers, all other	\$13.54	\$21.04	221	56	Work experience in a related field
11-1011	Chief executives	\$30.35	\$44.72	55	56	Degree plus work experience
13-2011	Accountants and auditors	\$21.62	\$24.42	75	0	Bachelor's degree
13-2021	Appraisers and assessors of real estate	\$13.88	\$10.88	44	0	Associate's degree
13-2051	Financial analysts	\$17.30	\$26.19	38	0	Bachelor's degree
13-2052	Personal financial advisors	\$10.61	\$18.61	137	0	Bachelor's degree
13-2072	Loan officers	\$19.75	\$25.03	12	0	Moderate-term on-the-job training
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	\$10.59	\$10.22	148	0	Short-term on-the-job training
41-1012	First-line supervisors/managers of non-retail sales workers	\$14.65	\$23.26	110	0	Work experience in a related field
41-2021	Counter and rental clerks	\$12.23	\$10.65	19	0	Short-term on-the-job training
41-3021	Insurance sales agents	\$14.44	\$16.52	116	0	Postsecondary vocational award
41-3031	Securities, commodities, and financial services sales agents	\$11.18	\$20.61	134	0	Bachelor's degree
41-9021	Real estate brokers	\$8.18	\$8.38	90	0	Work experience in a related field
41-9022	Real estate sales agents	\$7.93	\$7.94	285	0	Postsecondary vocational award
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	107	0	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	113	10	Moderate-term on-the-job training
43-3071	Tellers	\$10.77	\$11.56	78	0	Short-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	341	0	Moderate-term on-the-job training
43-4141	New accounts clerks	\$13.70	\$14.74	12	0	Work experience in a related field
43-6011	Executive secretaries and administrative assistants	\$18.96	\$19.30	61	13	Work experience in a related field
43-6014	Secretaries, except legal, medical, and executive	\$13.81	\$14.04	106	13	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	127	1	Short-term on-the-job training
49-9042	Maintenance and repair workers, general	\$15.29	\$16.00	116	0	Moderate-term on-the-job training

Source: EMSI

Professional, Scientific, and Technical Services (NAICS 54)

The professional, scientific, and technical services industry supports some of the other top industries in the County, predominately the manufacturing industry. Businesses in the professional, scientific and technical services industry are often innovative businesses that are vital to emerging opportunities. This industry also offers higher-paying engineering and technical jobs, often referred to “STEM” jobs (science, technology, engineering, and mathematics).

The top three occupations in this industry include photographers (185 industry jobs), management analysts (110 industry jobs), and accountants and auditors (108 industry jobs). Management analysts are also among the fastest growing occupation in the industry, projected to add 24 jobs in the industry over the next 10 years and 34 jobs overall. The openings rate for this occupation is about 7 a year; there are about 56 completions annually (degree plus work experience required).

Examples of businesses in the professional, scientific, and technical services industry include: Bernier Carr Group, United Communications Corp., Conboy McKay Bachman Kendall, and GYMO Architecture Engineering.

Professional, Scientific, and Technical Services Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
27-4021	Photographers	185	216	85.6%
13-1111	Management analysts	110	185	59.5%
13-2011	Accountants and auditors	108	333	32.4%
23-1011	Lawyers	80	146	54.8%
43-3031	Bookkeeping, accounting, and auditing clerks	66	745	8.9%
11-9199	Managers, all other	64	570	11.2%
17-1011	Architects, except landscape and naval	48	51	94.1%
43-6012	Legal secretaries	47	68	69.1%
43-6014	Secretaries, except legal, medical, and executive	36	803	4.5%
27-3091	Interpreters and translators	32	47	68.1%
43-9061	Office clerks, general	28	721	3.9%
17-3011	Architectural and civil drafters	26	29	89.7%
43-4171	Receptionists and information clerks	25	392	6.4%
13-2082	Tax preparers	24	25	96.0%
27-1024	Graphic designers	24	65	36.9%
29-2056	Veterinary technologists and technicians	23	26	88.5%
43-6011	Executive secretaries and administrative assistants	23	322	7.1%
15-1021	Computer programmers	22	54	40.7%
15-1031	Computer software engineers, applications	20	41	48.8%
15-1041	Computer support specialists	20	116	17.2%
15-1081	Network systems and data communications analysts	18	56	32.1%
31-9096	Veterinary assistants and laboratory animal caretakers	17	20	85.0%
11-1021	General and operations managers	17	414	4.1%
29-1131	Veterinarians	16	20	80.0%
19-3021	Market research analysts	15	40	37.5%
37-3011	Landscaping and groundskeeping workers	15	368	4.1%
17-2051	Civil engineers	15	63	23.8%
43-1011	First-line supervisors/managers of office and administrative support workers	15	434	3.5%
15-1051	Computer systems analysts	15	38	39.5%
27-1025	Interior designers	14	21	66.7%

Source: EMSI

Professional, Scientific, and Technical Services Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
11-9199	Managers, all other	64	72	8	570	663	93	221
37-3011	Landscaping and groundskeeping workers	15	22	7	368	453	85	123
43-9061	Office clerks, general	28	30	2	721	761	40	127
13-1111	Management analysts	110	134	24	185	219	34	61
43-3031	Bookkeeping, accounting, and auditing clerks	66	65	-1	745	778	33	113
13-2011	Accountants and auditors	108	107	-1	333	358	25	75
43-4171	Receptionists and information clerks	25	25	0	392	416	24	118
43-6011	Executive secretaries and administrative assistants	23	27	4	322	345	23	61
43-1011	First-line supervisors/managers of office and administrative support workers	15	15	0	434	454	20	107
27-4021	Photographers	185	204	19	216	234	18	56
17-1011	Architects, except landscape and naval	48	65	17	51	69	18	25
23-1011	Lawyers	80	84	4	146	160	14	38
15-1081	Network systems and data communications analysts	18	21	3	56	70	14	23
27-1024	Graphic designers	24	27	3	65	76	11	28
15-1031	Computer software engineers, applications	20	28	8	41	50	9	13
17-3011	Architectural and civil drafters	26	34	8	29	37	8	13
43-6014	Secretaries, except legal, medical, and executive	36	35	-1	803	810	7	106
19-3021	Market research analysts	15	18	3	40	47	7	17
17-2051	Civil engineers	15	17	2	63	70	7	17
27-3091	Interpreters and translators	32	36	4	47	53	6	15
15-1041	Computer support specialists	20	26	6	116	121	5	34
27-1025	Interior designers	14	19	5	21	26	5	10
15-1051	Computer systems analysts	15	16	1	38	42	4	11
29-2056	Veterinary technologists and technicians	23	23	0	26	27	1	7
29-1131	Veterinarians	16	16	0	20	21	1	4
13-2082	Tax preparers	24	22	-2	25	23	-2	4
31-9096	Veterinary assistants and laboratory animal caretakers	17	16	-1	20	18	-2	2
15-1021	Computer programmers	22	23	1	54	51	-3	9
11-1021	General and operations managers	17	18	1	414	401	-13	108
43-6012	Legal secretaries	47	27	-20	68	46	-22	9

Source: EMSI

Top Professional, Scientific, and Technical Services Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC	Educational Level
11-9199	Managers, all other	\$13.54	\$21.04	25	56	Work experience in a related field
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
13-1111	Management analysts	\$17.31	\$26.50	7	56	Degree plus work experience
13-2011	Accountants and auditors	\$21.62	\$24.42	8	0	Bachelor's degree
13-2082	Tax preparers	\$8.36	\$10.30	0	10	Moderate-term on-the-job training
15-1021	Computer programmers	\$22.93	\$31.27	1	0	Bachelor's degree
15-1031	Computer software engineers, applications	\$33.54	\$39.92	1	0	Bachelor's degree
15-1041	Computer support specialists	\$13.69	\$20.98	4	0	Associate's degree
15-1051	Computer systems analysts	\$22.91	\$34.08	1	2	Bachelor's degree
15-1081	Network systems and data communications analysts	\$20.42	\$27.99	3	2	Bachelor's degree
17-1011	Architects, except landscape and naval	\$29.95	\$28.69	3	0	Bachelor's degree
17-2051	Civil engineers	\$31.59	\$34.97	2	0	Bachelor's degree
17-3011	Architectural and civil drafters	\$19.84	\$21.83	1	0	Postsecondary vocational award
19-3021	Market research analysts	\$19.59	\$26.79	2	0	Bachelor's degree
23-1011	Lawyers	\$29.92	\$44.09	4	0	First professional degree
27-1024	Graphic designers	\$12.67	\$17.89	3	0	Bachelor's degree
27-1025	Interior designers	\$16.90	\$18.68	1	0	Associate's degree
27-3091	Interpreters and translators	\$11.91	\$18.47	2	0	Long-term on-the-job training
27-4021	Photographers	\$8.56	\$14.87	6	0	Long-term on-the-job training
29-1131	Veterinarians	\$32.39	\$35.94	0	0	First professional degree
29-2056	Veterinary technologists and technicians	\$15.49	\$14.08	1	0	Associate's degree
31-9096	Veterinary assistants and laboratory animal caretakers	\$10.15	\$11.35	0	0	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	\$10.25	\$10.32	14	0	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	12	0	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4171	Receptionists and information clerks	\$12.70	\$12.00	13	1	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	\$18.96	\$19.30	7	13	Work experience in a related field
43-6012	Legal secretaries	\$16.78	\$19.87	1	0	Associate's degree
43-6014	Secretaries, except legal, medical, and executive	\$13.81	\$14.04	12	13	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training

Source: EMSI

Telephone Call Centers (NAICS 56142)

One of the largest businesses to locate in Jefferson County in the last 20 years was the Stream call center. Telephone call centers and associated occupations fit well with the workforce of Jefferson County and provide job opportunities for those without secondary education and young professionals just starting out, as on-the-job training is often provided by the employer.

The top two occupations in this industry are customer service representatives and telemarketers, which employ 332 and 209 workers respectively. Customer service representatives occupations are expected to grow by 80 in the industry and 129 jobs in the County as a whole. There is high turnover in this occupation with 341 openings expected by 2021. An Associate’s degree is required for some of the more technical customer service representative occupations. Telemarketer occupations are expected to decline by about 30 jobs in the next ten years; however, there will be about 30 openings for this occupation (showing stability but not growth), which requires short-term on-the-job training.

Examples of businesses in the telephone call center industry include: Stream, Telephone Answering Service, and A Better Answer.

Telephone Call Center Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
43-4051	Customer service representatives	332	781	42.5%
41-9041	Telemarketers	209	229	91.3%
43-2011	Switchboard operators, including answering service	37	76	48.7%
43-1011	First-line supervisors/managers of office and administrative support workers	27	434	6.2%
41-1012	First-line supervisors/managers of non-retail sales workers	16	318	5.0%
15-1041	Computer support specialists	14	116	12.1%

Source: EMSI

Telephone Call Center Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
43-4051	Customer service representatives	332	412	80	781	910	129	341
41-1012	First-line supervisors/managers of non-retail sales workers	16	17	1	318	371	53	110
43-1011	First-line supervisors/managers of office and administrative support workers	27	31	4	434	454	20	107
15-1041	Computer support specialists	14	15	1	116	121	5	34
43-2011	Switchboard operators, including answering service	37	34	-3	76	66	-10	14
41-9041	Telemarketers	209	182	-27	229	200	-29	55

Source: EMSI

Top Telephone Call Center Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
15-1041	Computer support specialists	\$13.69	\$20.98	4	0	Associate's degree
41-1012	First-line supervisors/managers of non-retail sales workers	\$14.65	\$23.26	12	0	Work experience in a related field
41-9041	Telemarketers	\$7.25	\$10.35	6	0	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	12	0	Work experience in a related field
43-2011	Switchboard operators, including answering service	\$9.17	\$11.82	2	0	Short-term on-the-job training
43-4051	Customer service representatives	\$9.37	\$14.52	38	0	Moderate-term on-the-job training

Source: EMSI

Health Care and Social Assistance (NAICS 62)

As the third largest industry by employment and the third largest export industry in the County, the health care and social assistance industry is considered one of the top-performing industries in Jefferson County.

With over 900 jobs, the child care workers occupation is the largest occupation in the health care industry. Home health aide occupations have about 665 jobs in the industry and 692 jobs overall in the County. Rounding out the top five largest occupations in the industry are registered nurses; nursing aides, orderlies, and attendants; and personal and home care aides.

Child care worker occupations are the fastest growing within the industry and the second fastest growing overall in the County (expected to add 173 jobs in the industry and 214 jobs overall). There are about 57 job openings for this occupation annually, which requires on-the-job training. Home health aide occupations are expected to be the fastest growing with 269 new jobs by 2021 and 327 openings. This occupation also requires short-term on-the-job training.

There is expected to be demand for a total of 67 additional registered nurses by 2021, an average of 22 new positions a year. There were about 29 completions of an Associate's degree for registered nurses from JCC in 2010, suggesting that the opening rate is just slightly below the completion rate. There is also expected to be demand for physicians and surgeons. There are currently almost 300 jobs in this occupation in the County and by 2021 it is anticipated that there will be over 50 new jobs available with over 100 openings (average of about 12 openings annually).

Of note, almost every occupation in the health care industry is expected to add jobs in the next ten years.

Examples of employers in the health care and social assistance industry include: Samaritan Medical Center, Samaritan Keep Home, YMCA, and River Hospital, Inc.

Health Care and Social Assistance Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
39-9011	Child care workers	903	1,191	75.8%
31-1011	Home health aides	665	692	96.1%
29-1111	Registered nurses	636	873	72.9%
31-1012	Nursing aides, orderlies, and attendants	437	504	86.7%
39-9021	Personal and home care aides	367	435	84.4%
29-1069	Physicians and surgeons	296	361	82.0%
29-2061	Licensed practical and licensed vocational nurses	290	370	78.4%
43-4171	Receptionists and information clerks	188	392	48.0%
21-1093	Social and human service assistants	157	223	70.4%
31-9091	Dental assistants	148	159	93.1%
43-6014	Secretaries, except legal, medical, and executive	133	803	16.6%
43-9061	Office clerks, general	115	721	16.0%
21-1015	Rehabilitation counselors	101	122	82.8%
31-9092	Medical assistants	96	103	93.2%
19-3031	Clinical, counseling, and school psychologists	94	126	74.6%
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	89	871	10.2%
11-9111	Medical and health services managers	89	120	74.2%
43-1011	First-line supervisors/managers of office and administrative support workers	83	434	19.1%
43-3021	Billing and posting clerks and machine operators	82	166	49.4%
37-2012	Maids and housekeeping cleaners	78	418	18.7%
25-2011	Preschool teachers, except special education	77	103	74.8%
25-9041	Teacher assistants	76	631	12.0%
35-2021	Food preparation workers	72	566	12.7%
29-1071	Physician assistants	71	88	80.7%
43-3031	Bookkeeping, accounting, and auditing clerks	68	745	9.1%

Source: EMSI

Health Care and Social Assistance Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
31-1011	Home health aides	665	932	267	692	961	269	327
39-9011	Child care workers	903	1,076	173	1,191	1,405	214	516
39-9021	Personal and home care aides	367	479	112	435	555	120	166
29-1111	Registered nurses	636	675	39	873	940	67	202
31-9091	Dental assistants	148	208	60	159	221	62	87
29-1069	Physicians and surgeons	296	342	46	361	415	54	109
21-1093	Social and human service assistants	157	204	47	223	276	53	94
31-1012	Nursing aides, orderlies, and attendants	437	481	44	504	550	46	91
43-9061	Office clerks, general	115	132	17	721	761	40	127
29-2061	Licensed practical and licensed vocational nurses	290	317	27	370	404	34	136
43-3031	Bookkeeping, accounting, and auditing clerks	68	78	10	745	778	33	113
25-9041	Teacher assistants	76	90	14	631	660	29	147
43-4171	Receptionists and information clerks	188	205	17	392	416	24	118
31-9092	Medical assistants	96	119	23	103	126	23	33
29-1071	Physician assistants	71	90	19	88	110	22	36
21-1015	Rehabilitation counselors	101	120	19	122	143	21	42
25-2011	Preschool teachers, except special education	77	97	20	103	124	21	39
43-1011	First-line supervisors/managers of office and administrative support workers	83	96	13	434	454	20	107
19-3031	Clinical, counseling, and school psychologists	94	112	18	126	144	18	50
11-9111	Medical and health services managers	89	97	8	120	130	10	30
35-2021	Food preparation workers	72	71	-1	566	576	10	191
43-6014	Secretaries, except legal, medical, and executive	133	162	29	803	810	7	106
43-3021	Billing and posting clerks and machine operators	82	90	8	166	173	7	31
37-2012	Maids and housekeeping cleaners	78	66	-12	418	424	6	73
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	89	85	-4	871	831	-40	148

Source: EMSI

Top Health Care and Social Assistance Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC Completions	Educational Level
11-9111	Medical and health services managers	\$33.44	\$35.93	3	0	Degree plus work experience
19-3031	Clinical, counseling, and school psychologists	\$19.05	\$23.81	6	0	Doctoral degree
21-1015	Rehabilitation counselors	\$11.65	\$13.98	5	0	Master's degree
21-1093	Social and human service assistants	\$14.75	\$13.15	10	0	Moderate-term on-the-job training
25-2011	Preschool teachers, except special education	\$10.28	\$10.84	4	9	Postsecondary vocational award
25-9041	Teacher assistants	\$12.40	\$13.99	16	2	Short-term on-the-job training
29-1069	Physicians and surgeons	\$63.69	\$72.98	12	0	First professional degree
29-1071	Physician assistants	\$39.34	\$40.53	4	0	Master's degree
29-1111	Registered nurses	\$25.66	\$30.39	22	29	Associate's degree
29-2061	Licensed practical and licensed vocational nurses	\$16.17	\$18.97	15	0	Postsecondary vocational award
31-1011	Home health aides	\$10.43	\$9.81	36	0	Short-term on-the-job training
31-1012	Nursing aides, orderlies, and attendants	\$9.99	\$11.68	10	0	Postsecondary vocational award
31-9091	Dental assistants	\$16.53	\$15.97	10	0	Moderate-term on-the-job training
31-9092	Medical assistants	\$15.16	\$14.23	4	0	Moderate-term on-the-job training
35-2021	Food preparation workers	\$8.37	\$9.17	21	0	Short-term on-the-job training
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	\$10.59	\$10.22	16	0	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	\$8.40	\$8.56	8	0	Short-term on-the-job training
39-9011	Child care workers	\$7.38	\$7.96	57	0	Short-term on-the-job training
39-9021	Personal and home care aides	\$9.57	\$8.81	18	0	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	\$19.88	\$21.86	12	0	Work experience in a related field
43-3021	Billing and posting clerks and machine operators	\$13.90	\$15.25	3	10	Short-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4171	Receptionists and information clerks	\$12.70	\$12.00	13	1	Short-term on-the-job training
43-6014	Secretaries, except legal, medical, and executive	\$13.81	\$14.04	12	13	Moderate-term on-the-job training
43-9061	Office clerks, general	\$11.09	\$12.42	14	1	Short-term on-the-job training

Source: EMSI

Accommodation and Food Services (NAICS 72)

Accommodations and food services is the fourth largest industry in the County and it has experienced a large amount of growth over the past few years. This industry was also one that was frequently mentioned during the stakeholder interviews as it relates to potential opportunities for tourism.

The top six occupations in the accommodation and food services industry are a combination of food preparation and serving/waiting occupations. Together, there are over 3,000 of these jobs in the County. Each of these occupations are projected to grow. There is also a high turnover rate for these occupations; when considered together, the number of openings is roughly five times the number of jobs added.

Education for accommodation and food service workers is typically short-term on-the-job training or work experience in a related field (often management level occupations).

Examples of businesses in Jefferson County for this industry include: Hilton Garden Inn, Texas Roadhouse, Olive Garden, Ruby Tuesday, Buffalo Wild Wings, and Cracker Barrel.

Accommodation and Food Services Occupations: Largest in 2012				
SOC	Occupation	Jobs in Industry	Total Jobs	Industry % of Total Jobs
35-3021	Combined food preparation and serving workers, including fast food	713	868	82.1%
35-3031	Waiters and waitresses	703	745	94.4%
35-2021	Food preparation workers	327	566	57.8%
35-2011	Cooks, fast food	284	297	95.6%
35-1012	First-line supervisors/managers of food preparation and serving workers	274	336	81.5%
35-2014	Cooks, restaurant	214	223	96.0%
35-9021	Dishwashers	193	214	90.2%
35-3011	Bartenders	183	240	76.3%
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	160	230	69.6%
11-9051	Food service managers	144	154	93.5%
37-2012	Maids and housekeeping cleaners	123	418	29.4%
41-2011	Cashiers, except gaming	111	1,617	6.9%
35-9011	Dining room and cafeteria attendants and bartender helpers	101	117	86.3%
35-2015	Cooks, short order	97	122	79.5%
11-9081	Lodging managers	90	93	96.8%
43-4081	Hotel, motel, and resort desk clerks	76	78	97.4%
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	72	74	97.3%
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	41	871	4.7%
49-9042	Maintenance and repair workers, general	36	568	6.3%
53-3031	Driver/sales workers	35	117	29.9%
39-6011	Baggage porters and bellhops	28	168	16.7%
43-3031	Bookkeeping, accounting, and auditing clerks	22	745	3.0%
11-1021	General and operations managers	22	414	5.3%
35-1011	Chefs and head cooks	21	27	77.8%
51-3011	Bakers	17	71	23.9%

Source: EMSI

Accommodation and Food Services Occupations: Ranked by Total Projected Growth								
SOC	Occupation	Industry Jobs 2012	Industry Jobs 2021	Industry Change	Total Jobs 2012	Total Jobs 2021	Total Change	Total Openings 2012-2021
35-3021	Combined food preparation and serving workers, including fast food	713	813	100	868	981	113	275
39-6011	Baggage porters and bellhops	28	28	0	168	247	79	116
35-3031	Waiters and waitresses	703	737	34	745	786	41	406
49-9042	Maintenance and repair workers, general	36	38	2	568	605	37	116
43-3031	Bookkeeping, accounting, and auditing clerks	22	23	1	745	778	33	113
35-9021	Dishwashers	193	215	22	214	238	24	102
11-9051	Food service managers	144	167	23	154	178	24	49
35-2011	Cooks, fast food	284	306	22	297	320	23	89
35-1012	First-line supervisors/managers of food preparation and serving workers	274	287	13	336	351	15	43
35-2014	Cooks, restaurant	214	227	13	223	238	15	66
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	160	174	14	230	244	14	163
35-2021	Food preparation workers	327	336	9	566	576	10	191
35-3011	Bartenders	183	173	-10	240	248	8	85
11-9081	Lodging managers	90	97	7	93	101	8	26
43-4081	Hotel, motel, and resort desk clerks	76	83	7	78	86	8	31
37-2012	Maids and housekeeping cleaners	123	124	1	418	424	6	73
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	72	76	4	74	79	5	50
35-9011	Dining room and cafeteria attendants and bartender helpers	101	104	3	117	121	4	49
53-3031	Driver/sales workers	35	36	1	117	121	4	22
51-3011	Bakers	17	16	-1	71	73	2	19
35-1011	Chefs and head cooks	21	22	1	27	28	1	4
35-2015	Cooks, short order	97	93	-4	122	120	-2	28
11-1021	General and operations managers	22	21	-1	414	401	-13	108
41-2011	Cashiers, except gaming	111	113	2	1,617	1,577	-40	655
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	41	40	-1	871	831	-40	148

Source: EMSI

Accommodation and Food Services Occupations: Opportunity Overview						
SOC	Occupation	Median Wage	National Wage	Annual Openings	2010 JCC	Educational Level
11-9051	Food service managers	\$11.56	\$15.21	5	0	Work experience in a related field
11-9081	Lodging managers	\$9.26	\$15.93	3	0	Work experience in a related field
11-1021	General and operations managers	\$35.02	\$42.63	12	56	Degree plus work experience
35-1011	Chefs and head cooks	\$22.03	\$17.78	0	0	Work experience in a related field
35-1012	First-line supervisors/managers of food preparation and serving workers	\$10.17	\$14.00	5	0	Work experience in a related field
35-2011	Cooks, fast food	\$8.68	\$8.71	10	0	Short-term on-the-job training
35-2014	Cooks, restaurant	\$11.25	\$10.71	7	0	Long-term on-the-job training
35-2015	Cooks, short order	\$8.45	\$9.50	3	0	Short-term on-the-job training
35-2021	Food preparation workers	\$8.37	\$9.17	21	0	Short-term on-the-job training
35-3011	Bartenders	\$8.28	\$8.96	9	0	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	\$7.49	\$8.42	31	0	Short-term on-the-job training
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	\$7.87	\$8.76	18	0	Short-term on-the-job training
35-3031	Waiters and waitresses	\$8.93	\$8.60	45	0	Short-term on-the-job training
35-9011	Dining room and cafeteria attendants and bartender helpers	\$8.32	\$8.52	5	0	Short-term on-the-job training
35-9021	Dishwashers	\$7.87	\$8.53	11	0	Short-term on-the-job training
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	\$8.48	\$8.72	6	0	Short-term on-the-job training
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	\$10.59	\$10.22	16	0	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	\$8.40	\$8.56	8	0	Short-term on-the-job training
39-6011	Baggage porters and bellhops	\$13.00	\$9.77	13	0	Short-term on-the-job training
41-2011	Cashiers, except gaming	\$8.37	\$8.88	73	0	Short-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	\$14.42	\$15.77	13	10	Moderate-term on-the-job training
43-4081	Hotel, motel, and resort desk clerks	\$9.08	\$9.64	3	0	Short-term on-the-job training
49-9042	Maintenance and repair workers, general	\$15.29	\$16.00	13	0	Moderate-term on-the-job training
51-3011	Bakers	\$10.30	\$11.70	2	0	Long-term on-the-job training
53-3031	Driver/sales workers	\$8.68	\$11.80	2	0	Short-term on-the-job training

Source: EMSI

Educational Attainment

Camoin Associates also reviewed data related to educational attainment for the County. Compared to the regional economy, a higher portion of Jefferson County residents hold only a high school diploma or just some college while slightly higher portions of the population in the Economic Region hold Bachelor's, Associate's, and Graduate Degrees or higher.

Educational Attainment		
Education Level	Jefferson County	Economic Region*
Less than 9th Grade	5.5%	6.1%
9th Grade to 12th Grade	7.7%	6.9%
High School Diploma	35.7%	32.6%
Some College	19.3%	18.6%
Associate's Degree	11.3%	11.1%
Bachelor's Degree	11.9%	14.3%
Graduate Degree & Higher	8.7%	10.2%

Source: EMSI Complete Employment - 2011.3

*Note: Educational Attainment data is not available at the zip code scale; therefore, the above data covers St. Lawrence, Jefferson, Oswego, Oneida, and Onondaga Counties.

Labor Market Demand for Postsecondary Programs

One method of assessing the labor market demand for various postsecondary programs is to compare regional program completions (the number of students graduating from a particular postsecondary program) to regional job openings. In Jefferson County, there is only one postsecondary institution, Jefferson Community College (JCC). As such, the following completion data is specific to JCC.

Community colleges tend to be the best institutions to respond to fluctuations in local workforce needs. According to the 2009 report Thriving in Challenging Times: Connecting Education to Economic Development through Career Pathways ...the institutions that are ideally positioned to provide the postsecondary education and training needed for most jobs are the country's almost 1,200 community and technical colleges.⁵ Additionally, with JCC located within the County's borders, local businesses and other economic development stakeholders have a direct connection with the school, more-so than other regional institutions.

Before getting into the specifics of the data, please note that "openings" refers to the sum of **new and replacement jobs** in the occupation. Additional information detailing the difference between the total jobs in a region and the number of openings is provided at the end of this report in the "Additional Information & References" section.

The two programs in Jefferson County with the greatest number of completions include programs in liberal arts (126 completions) and humanities (125 completions). In 2011, there were only 14 job openings that required a liberal arts degree; however, it is important to note that many students that obtain this 2-year degree from JCC then transfer to another college or university to obtain a more advanced degree.

Business administration and management has the greatest number of openings in the County (102 openings) and only 56 completions. Similarly, general office occupations had 71 openings and only one completion. The demand for these two programs is not currently being met by the existing completion rates and there may be an opportunity to meet this demand. Other highly desired programs include administrative assistant and secretarial science, teacher assistant/aid, and accounting technology/bookkeeping.

⁵ http://www.ncpn.info/downloads/Thriving_in_Challenging_Times.pdf

Regional Programs: Jefferson County						
Program	Comp. 2010	Openings 2011	Med. Hourly Wage 2011	Jobs 2011	Jobs 2021	Growth 2011-2021
Business Administration and Management	56	102	\$21.18	2,084	2,357	13%
General Office Occupations and Clerical Services	1	71	\$13.77	2,288	2,303	1%
Registered Nursing/Registered Nurse	29	29	\$25.66	859	940	9%
Administrative Assistant & Secretarial Science	13	26	\$15.28	1,114	1,154	4%
Teacher Assistant/Aide	2	24	\$12.40	621	660	6%
Accounting Technology/Technician and Bookkeeping	10	22	\$14.28	984	1,025	4%
Animal/Livestock Husbandry and Production	7	17	\$9.56	1,237	1,092	(12%)
Licensed Practical/Vocational Nurse Training	61	16	\$16.17	365	404	11%
Liberal Arts and Sciences/Liberal Studies	126	14	\$38.75	383	419	9%
Community Organization and Advocacy	13	8	\$20.23	163	190	16%
Computer & Information Sciences, General	2	8	\$23.67	174	207	19%
Child Care & Support Services Management	9	6	\$10.28	99	124	25%
Information Science/Studies	6	4	\$26.20	92	109	18%
Criminal Justice/Law Enforcement Administration	43	3	\$29.52	50	54	9%
Tourism Promotion Operations	17	3	\$14.54	34	48	40%
Legal Assistant/Paralegal	6	2	\$20.05	84	89	6%
Fire Services Administration	2	2	\$29.91	30	32	5%
EMT Paramedic	11	1	\$12.36	65	50	(23%)
Engineering, General	7	1	\$28.97	23	27	15%
Humanities/Humanistic Studies	125	0	\$0.00	0	0	0%
General Studies	5	0	\$0.00	0	0	0%

Source: EMSI

As noted previously, many students obtain a 2-year degree from JCC before moving on to a 4-year degree from a larger college. The majority of students that take this path transfer to one of the colleges in the North Country region of New York. Therefore, instead of showing completion data for the economic region, college program information is provided for the North Country Region, which includes Clinton, Essex, Franklin, Hamilton, Jefferson, Lewis, and St. Lawrence Counties. It is important to note that the opening figures are for the North Country Region as a whole and are not specific to Jefferson County.

Regional Programs: North Country Region						
Program	Comp. 2010	Openings 2011	Med. Hourly Wage 2011	Jobs 2011	Jobs 2021	Growth 2011-2021
Retailing and Retail Operations	5	620	\$9.26	17,869	17,607	(1%)
Business Administration and Management, General	313	364	\$20.59	8,354	9,211	10%
Business, Management, Marketing, and Related Support Services, Other	28	333	\$14.91	8,725	9,331	7%
Business/Commerce, General	58	317	\$22.07	7,198	7,919	10%
Education, General	13	278	\$32.78	8,781	9,124	4%
Cooking and Related Culinary Arts, General	2	222	\$10.16	6,408	6,860	7%
Entrepreneurship/Entrepreneurial Studies	25	217	\$23.65	4,695	5,105	9%
General Office Occupations and Clerical Services	1	210	\$13.33	8,253	8,032	(3%)
Business Administration, Management and Operations, Other	4	177	\$12.94	3,402	3,940	16%
Crisis/Emergency/Disaster Management	4	141	\$15.11	2,458	2,867	17%
Entrepreneurial and Small Business Operations, Other	12	131	\$13.80	2,247	2,648	18%
Physical Education Teaching and Coaching	12	128	\$27.28	3,546	3,722	5%
Finance, General	43	127	\$18.43	2,294	2,856	25%
Registered Nursing/Registered Nurse	232	113	\$25.90	3,304	3,615	9%
Technology Teacher Education/Industrial Arts Teacher Education	1	102	\$31.54	3,040	3,063	1%
Animal/Livestock Husbandry and Production	7	95	\$9.37	5,948	5,693	(4%)
English/Language Arts Teacher Education	13	92	\$31.55	2,728	2,754	1%
Mathematics Teacher Education	12	92	\$31.55	2,728	2,754	1%
Music Teacher Education	73	92	\$31.55	2,728	2,754	1%
Reading Teacher Education	98	92	\$31.55	2,728	2,754	1%
Science Teacher Education/General Science Teacher Education	15	92	\$31.55	2,728	2,754	1%
Social Studies Teacher Education	29	92	\$31.55	2,728	2,754	1%

Regional Programs: North Country Region						
Program	Comp. 2010	Openings 2011	Med. Hourly Wage 2011	Jobs 2011	Jobs 2021	Growth 2011-2021
Foods, Nutrition, and Wellness Studies, General	9	90	\$10.42	1,994	2,376	19%
Elementary Education and Teaching	118	87	\$31.57	2,607	2,739	5%
Accounting and Finance	21	87	\$21.60	2,202	2,503	14%
Teacher Assistant/Aide	2	82	\$12.63	2,955	2,993	1%
Accounting Technology/Technician and Bookkeeping	25	77	\$13.65	3,635	3,749	3%
Administrative Assistant and Secretarial Science, General	27	76	\$15.22	4,447	4,393	(1%)
Education, Other	135	75	\$12.91	2,477	2,681	8%
Latin American Studies	2	73	\$38.29	2,727	2,843	4%
Area Studies, Other	1	73	\$38.29	2,727	2,843	4%
Women's Studies	11	73	\$38.29	2,727	2,843	4%
English Language and Literature, General	167	73	\$38.29	2,727	2,843	4%
Rhetoric and Composition	21	73	\$38.29	2,727	2,843	4%
Liberal Arts and Sciences/Liberal Studies	251	73	\$38.29	2,727	2,843	4%
Philosophy	13	73	\$38.29	2,727	2,843	4%
Religion/Religious Studies	2	73	\$38.29	2,727	2,843	4%
Music History, Literature, and Theory	1	73	\$38.29	2,727	2,843	4%
International Business/Trade/Commerce	16	73	\$33.43	2,160	2,135	(1%)
Secondary Education and Teaching	24	66	\$32.13	1,950	1,937	(1%)
Agricultural Teacher Education	33	66	\$32.13	1,950	1,937	(1%)
Biology Teacher Education	1	66	\$32.13	1,950	1,937	(1%)
French Language Teacher Education	3	66	\$32.13	1,950	1,937	(1%)
Physics Teacher Education	2	66	\$32.13	1,950	1,937	(1%)
Spanish Language Teacher Education	4	66	\$32.13	1,950	1,937	(1%)
Building/Property Maintenance	9	62	\$16.95	1,841	2,020	10%
Licensed Practical/Vocational Nurse Training	194	56	\$16.03	1,305	1,398	7%
Accounting	36	53	\$20.96	1,516	1,682	11%
Special Education and Teaching, General	72	48	\$33.50	1,262	1,346	7%
Social Work	22	46	\$22.22	1,075	1,187	10%
Hotel/Motel Administration/Management	59	46	\$10.65	1,173	1,295	10%
Visual and Performing Arts, General	13	45	\$9.64	1,102	1,221	11%
Hospitality Administration/Management, General	39	43	\$10.67	1,115	1,231	10%
Art/Art Studies, General	128	42	\$9.73	1,039	1,152	11%
Construction Engineering Technology/Technician	26	41	\$15.19	1,244	1,388	12%
Criminal Justice/Police Science	103	41	\$22.73	1,124	1,199	7%
Education/Teaching of Individuals with Specific Learning Disabilities	3	32	\$34.01	794	857	8%
Psychology, General	252	32	\$18.87	643	718	12%

Regional Programs: North Country Region						
Program	Comp. 2010	Openings 2011	Med. Hourly Wage 2011	Jobs 2011	Jobs 2021	Growth 2011-2021
Automobile/Automotive Mechanics Technology/Technician	28	31	\$12.53	1,462	1,416	(3%)
Counseling Psychology	6	30	\$19.13	597	665	11%
Computer and Information Sciences, General	30	29	\$22.48	730	835	14%
Speech Communication and Rhetoric	46	28	\$11.25	649	736	13%
Forest Resources Production and Management	3	27	\$11.98	638	692	9%
Mass Communication/Media Studies	5	27	\$10.92	671	747	11%
Journalism	26	27	\$10.93	682	757	11%
Information Technology	5	27	\$22.78	659	777	18%
Early Childhood Education and Teaching	81	26	\$20.88	719	789	10%
Substance Abuse/Addiction Counseling	11	25	\$17.64	446	551	23%
Culinary Arts/Chef Training	60	24	\$12.03	807	821	2%
Educational Leadership and Administration, General	14	23	\$38.92	614	629	2%
Educational, Instructional, and Curriculum Supervision	23	23	\$38.92	614	629	2%
Counselor Education/School Counseling and Guidance Services	38	23	\$21.35	720	761	6%
Community Organization and Advocacy	41	23	\$21.57	586	640	9%
Music Performance, General	23	23	\$8.76	610	666	9%
Parks, Recreation and Leisure Studies	27	22	\$10.39	625	695	11%
Parks, Recreation and Leisure Facilities Management, General	4	22	\$10.30	603	670	11%

Source: EMSI

Career Clusters & Pathways

The labor force market demand is also examined by evaluating career clusters, which are groups of related occupations that involve similar tasks and require similar skills. Career clusters are collections of standard occupation codes (SOC) organized by pathways, which define routes of career advancement within the career cluster.⁶

The table below contains the career clusters in Jefferson County and identifies the top five largest and fastest growing clusters that are examined in greater detail below. Please note that though the government career cluster is identified as one of the top clusters in the region, career pathways are not available for military occupations and career pathways cannot be analyzed.

Career Clusters in Jefferson County						
Cluster Code	Cluster Name	2012 Jobs	2021 Jobs	Change	Top 5 Largest	Top 5 Fastest Growing
1	Agriculture, Food & Natural Resources	5,641	5,833	192		
2	Architecture & Construction	4,105	4,555	450		
3	Arts, A/V Technology & Communications	2,197	2,346	149		
4	Business, Management & Administration	13,291	14,223	932	x	x
5	Education & Training	5,130	5,670	540		
6	Finance	3,638	4,287	649		x
7	Government & Public Administration	19,988	20,498	510	x	
8	Health Science	7,787	9,003	1,216		x
9	Hospitality & Tourism	9,192	9,766	574	x	
10	Human Services	7,790	9,094	1,304	x	x
11	Information Technology	596	661	65		
12	Law, Public Safety, Corrections & Security	2,873	3,149	276		
13	Manufacturing	2,178	2,357	179		
14	Marketing, Sales & Service	9,637	10,119	482	x	
15	Science, Technology, Engineering & Mathematics	1,842	1,975	133		
16	Transportation, Distribution, & Logistics	8,002	8,620	618	x	x

Source: EMSI Complete Employment - 2011.3

Note: Some occupations occur in multiple clusters and not all occupations are encompassed by career clusters.

The following tables contain career pathway information for the seven occupation clusters identified above. The top career pathways for each cluster is shown, followed by a summary of educational attainment requirements for each. This information will be used to identify which industries could be offering internships and what new programs could be offered by JCC to move workers along the career pathway into occupations in demand.

⁶ Additional information on career clusters can be found on the Nationwide, Career Technical Education (CTE) website. <http://www.careertech.org/>

Business, Management & Administration Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Business, Management & Administration	13,291	14,223	932	3,920
Marketing and Communications Pathway	7,069	7,553	484	2,308
Bachelor's degree	713	866	153	277
Degree plus work experience	553	550	-3	146
Long-term on-the-job training	48	44	-4	11
Moderate-term on-the-job training	885	1,021	136	372
Postsecondary vocational award	1,034	1,273	239	401
Short-term on-the-job training	3,260	3,158	-102	931
Work experience in a related field	577	642	65	169
Administrative & Information Support Pathway	3,763	3,884	121	992
Associate's degree	102	82	-20	13
Moderate-term on-the-job training	1,216	1,349	133	413
Postsecondary vocational award	63	66	3	10
Short-term on-the-job training	1,626	1,588	-38	388
Work experience in a related field	756	798	42	168
Bus. Financial Man. and Accounting Pathway	3,083	3,376	293	868
Bachelor's degree	350	378	28	81
Degree plus work experience	517	586	69	164
Long-term on-the-job training	50	60	10	22
Moderate-term on-the-job training	1,568	1,724	156	463
Short-term on-the-job training	166	173	7	31
Work experience in a related field	434	454	20	107
Human Resources Pathway	1,362	1,641	279	528
Bachelor's degree	194	219	25	68
Degree plus work experience	28	28	0	6
Long-term on-the-job training	504	670	166	217
Master's degree	0	0	0	0
Short-term on-the-job training	65	61	-4	17
Work experience in a related field	570	663	93	221

Source: EMSI

Finance Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Finance	3,638	4,287	649	1,394
Banking and Related Services Pathway	2,849	3,317	468	1,040
Associate's degree	116	121	5	34
Bachelor's degree	879	1,049	170	287
Degree plus work experience	159	183	24	49
Long-term on-the-job training	457	617	160	202
Moderate-term on-the-job training	942	1,068	126	369
Short-term on-the-job training	297	279	-18	99
Insurance Services Pathway	1,193	1,391	198	494
Bachelor's degree	13	12	-1	4
Degree plus work experience	18	20	2	6
Long-term on-the-job training	50	60	10	22
Moderate-term on-the-job training	806	937	131	346
Postsecondary vocational award	306	361	55	116

Source: EMSI

Health Science Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Health Science	7,787	9,003	1,216	2,596
Therapeutic Services Pathway	4,644	5,484	840	1,539
Associate's degree	979	1,057	78	230
Bachelor's degree	79	87	8	27
Doctoral degree	126	144	18	50
First professional degree	571	648	77	178
Long-term on-the-job training	457	617	160	202
Master's degree	301	353	52	97
Moderate-term on-the-job training	432	521	89	164
Postsecondary vocational award	982	1,065	83	257
Short-term on-the-job training	717	991	274	335
Health Informatics Pathway	2,538	2,896	358	906
Associate's degree	59	64	5	16
Bachelor's degree	282	317	35	95
Degree plus work experience	305	348	43	91
Master's degree	120	133	13	44
Moderate-term on-the-job training	904	1,059	155	380
Postsecondary vocational award	53	55	2	8
Short-term on-the-job training	246	256	10	52
Work experience in a related field	570	663	93	221

Source: EMSI

Hospitality and Tourism Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Hospitality & Tourism	9,192	9,766	574	2,710
Lodging Pathway	4,688	4,868	180	1,065
Degree plus work experience	682	686	4	187
Moderate-term on-the-job training	1,392	1,465	73	243
Short-term on-the-job training	1,751	1,796	45	425
Work experience in a related field	863	920	57	211
Recreation, Amusements & Attractions Pathway	2,398	2,582	184	655
Bachelor's degree	466	520	54	118
Degree plus work experience	466	457	-9	121
Long-term on-the-job training	181	190	9	50
Master's degree	6	6	0	2
Moderate-term on-the-job training	664	709	45	142
Postsecondary vocational award	91	105	14	30
Short-term on-the-job training	204	227	23	87
Work experience in a related field	320	369	49	105
Restaurants & Food & Beverage Services	2,876	3,009	133	1,113
Degree plus work experience	587	585	-2	162
Long-term on-the-job training	294	312	18	85
Moderate-term on-the-job training	30	36	6	8
Short-term on-the-job training	1,449	1,520	71	762
Work experience in a related field	517	556	39	96
Travel and Tourism Pathway	1,413	1,583	170	453
Bachelor's degree	82	93	11	28
Degree plus work experience	272	291	19	82
Long-term on-the-job training	47	53	6	15
Moderate-term on-the-job training	52	54	2	16
Postsecondary vocational award	12	10	-2	1
Short-term on-the-job training	56	74	18	29
Work experience in a related field	892	1,008	116	282

Source: EMSI

Human Services Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Human Services	7,790	9,094	1,304	2,897
Consumer Services Career Pathway	3,500	4,147	647	1,368
Associate's degree	59	64	5	16
Bachelor's degree	999	1,312	313	471
Degree plus work experience	227	255	28	66
Long-term on-the-job training	48	44	-4	11
Moderate-term on-the-job training	801	933	132	347
Postsecondary vocational award	305	360	55	116
Short-term on-the-job training	142	160	18	41
Work experience in a related field	918	1,019	101	300
Early Childhood Development Career Pathway	2,180	2,479	299	789
Bachelor's degree	168	186	18	56
Degree plus work experience	18	21	3	8
Postsecondary vocational award	103	124	21	39
Short-term on-the-job training	1,822	2,065	243	662
Work experience in a related field	70	83	13	23

Source: EMSI

Marketing, Sales & Service Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Marketing, Sales & Service	9,637	10,119	482	3,015
Buying and Merchandising Pathway	4,157	4,253	96	1,358
Moderate-term on-the-job training	844	979	135	365
Short-term on-the-job training	3,313	3,274	-39	994
Professional Sales and Marketing Pathway	3,545	3,800	255	1,074
Associate's degree	159	188	29	57
Bachelor's degree	9	10	1	4
Long-term on-the-job training	48	44	-4	11
Moderate-term on-the-job training	135	143	8	40
Postsecondary vocational award	728	913	185	285
Short-term on-the-job training	1,889	1,860	-29	508
Work experience in a related field	577	642	65	169
Management and Entrepreneurship Pathway	713	843	130	258
Bachelor's degree	437	549	112	175
Degree plus work experience	276	294	18	82

Source: EMSI

Transportation, Distribution, and Logistics Career Cluster: Top Pathways				
	2012 Jobs	2021 Jobs	Change	Openings
Transportation, Distribution, & Logistics	8,002	8,620	618	2,273
Health, Safety and Environmental Pathway	1,064	1,321	257	434
Associate's degree	1	1	0	0
Bachelor's degree	21	23	2	6
Long-term on-the-job training	457	617	160	202
Master's degree	15	17	2	5
Work experience in a related field	570	663	93	221
Transportation Planning, Management, & Regulation	939	1,170	231	377
Associate's degree	57	59	2	12
Bachelor's degree	63	70	7	17
Degree plus work experience	173	184	11	55
Long-term on-the-job training	497	666	169	223
Master's degree	9	11	2	3
Moderate-term on-the-job training	19	21	2	4
Short-term on-the-job training	6	6	0	2
Work experience in a related field	115	153	38	61
Facility and Mobile Equipment Maintenance Pathway	2,042	2,162	120	481
Associate's degree	33	33	0	7
Degree plus work experience	48	51	3	12
Long-term on-the-job training	1,217	1,337	120	307
Moderate-term on-the-job training	12	13	1	3
Postsecondary vocational award	683	682	-1	143
Short-term on-the-job training	47	45	-2	9

Source: EMSI

INTERVIEW SUMMARIES

Introduction

In order to best assess Jefferson County's economic strengths and opportunities, the socioeconomic and industry trends data is combined with knowledge gained through interviews and conversations with industry and economic development stakeholders. Interviews help to reveal strengths of the relationships between firms, service providers, and other stakeholders involved in the local and regional economy and the potential for further private and public investment. New information is gleaned beyond what is stated by the data and provides real time information about struggles and successes of local business owners and professionals.

On March 20th and 21st, 2012 Camoin Associates conducted a site visit to the County to interview key stakeholders. Camoin worked with the Jefferson County Comprehensive Economic Development Strategy Committee ("Committee") to develop and refine an interview contact list. Camoin Associates conducted most of the interviews in-person with area professionals, industry leaders, and business leaders. These interviews provide both internal and external perspectives of the County's strengths, weaknesses, opportunities, and threats, and were also used to solicit information for various components of the plan.

The interviews also serve as a tool for Camoin Associates and the Committee to better understand the County in the terms that a site selector or a CEO may consider when determining their next location or investment decision. While the interviews offer invaluable information to the CEDS they can only offer a snapshot in time of the situation in the County and will be used as one of many information sources. The following document summarizes the major themes and findings of the stakeholder interviews. A list of the individuals interviewed can be found at the end.

Agriculture

Agriculture has been important to Jefferson County for generations and there is a strength (historical and current) in the dairy industry throughout Upstate New York. Camoin Associates heard from many interviewees about the importance of agriculture and the need for more value-added processing in order to increase sales and profitability for farmers. The historic strength of agriculture means that there are support services throughout the County to serve the local farmers (farm equipment stores, private agricultural consultants, agriculture agencies, large animal veterinarians, Cornell Cooperative Extension, etc.), but the interviews helped to identify where additional support is needed and what opportunities exist. The following is a summary of the interview themes related to agriculture.

- The national pricing system for milk makes it difficult for dairy farmers to be profitable.
- There is a lack of support for agriculture as an economic development tool from the State level.
 - Lack of funding or marketing support
 - Very highly regulated
- The potential for an anaerobic digester has not been fully realized for energy production.
- Farmers like selling locally and regionally to reduce transportation costs of selling out of the state or region.
- Transportation infrastructure is important to dairy farmers.
 - Access to a deep water port would be beneficial to distribution systems (only one is in Clayton)
 - Access to rail spurs is important and beneficial for farmers looking to transport grains and other end products
- Food manufacturing and other value added production processes is projected to be a growth industry (in the region and nationally).

- The lack of meat processing operations in the Region presents an opportunity. The closest USDA processor is two hours away.
- Most food manufacturers choose to be located in close proximity to both the raw products and the market making Jefferson County a prime location because of its easy access to both the farms and within a day's drive of the largest markets in the United States.
- Upstate New York has seen recent successes in greek yogurt manufacturing, signaling the beginning of a dairy product manufacturing industry cluster. Governor Cuomo has been a big driver behind the success of Chobani and others in the Fingers Lakes Region of New York.
- Many local dairy product manufacturing facilities including Great Lakes Cheese and Crowley. Supply of milk for dairy product manufacturing is sufficient.
- Food manufacturing facilities provide stability for regional suppliers.
- With the high-quality soil, weather, and water access there is an opportunity to focus on commodity crops such as soybeans, wheat and corn. Transportation to get these items to New Jersey ports and out of the country could bring money to the area.
- There is an opportunity for agri-tourism to combine tourism and agriculture through farm tours and tastings.
 - New wineries and distilleries are opening in the area, which combine not only value added processing but also tourism through the development of wine tours.
 - The Seaway Wine Trail attracts tourists for wine tasting and other agriculture products.
 - 87 mile long wine trail with 80 different wineries
 - Need to differentiate Jefferson County wine region from the Finger Lakes and Long Island
 - Thousand Islands Agriculture Tour brings wine tourists into the more remote areas of the County.
 - Two new hops farms have opened recently in the County, which could lead to a brewery and potential for brewery tours and visitors

Business Environment

Beyond the available work force, educational programs, and infrastructure aspects of a community, the perception and reality of how business-friendly a place is can be a major concern for businesses when considering a major investment. While leaders in New York State have been working to improve the reputation of the State, NY has a lingering poor reputation when it comes to being business friendly; high taxes, confusing regulations and a lack of incentive programs makes it difficult for new businesses to move in or for existing businesses to expand. Economic development professionals in Jefferson County have made a very good impression on many of those interviewed. The following is a summary of the comments regarding the operational and business environment in Jefferson County:

- Jefferson County economic development organizations are welcoming and willing to help new businesses locate or existing businesses expand.
- Local economic development organizations should continue to help make the process easier for new businesses by acting as a liaison to the NYS government for funding, regulations, permitting, etc. to reduce need for businesses to deal with NYS on their own.
- A few interviewees noted how impressed they were by the industrial parks and how the lease rates made it possible for them to expand into the larger site and increase employment.
- Few people locate in Jefferson County without some connection to the area. Economic development professionals should work on building new businesses from within, focus on small

businesses and entrepreneurs who are already in Jefferson County and have a reason to stay. It is more difficult to attract a new business than to help support an existing one.

- It is difficult for a Canadian business to open a location in Jefferson County due to different regulations, requirements, permitting, etc.
 - Particularly hard for a business to come from Canada and locate in U.S. (and vice versa). Need a central clearinghouse to deal with inquiries, regulations, restrictions, paperwork, incentives, etc.
- Many businesses find it hard to be profitable because they are always trying to offset the advantages that their competition has in other parts of the United States and around the world (labor costs, operating costs, energy costs, taxes, etc.).
 - Challenges to being in New York State and Jefferson County include high cost of utilities, high transportation costs (long travel distances to major markets), high costs related to workers compensation, strict environmental regulations, and high taxes.

Health Care

The comments on health care reinforced what the economic data illustrated, including that the health care industry in Jefferson County is strong and is expected to continue that way. In particular, it was mentioned what a positive impact Fort Drum has on the local health care services industry. There are no inpatient services provided on base to soldiers and their families; therefore, they need to use local providers (this setup is unique to Fort Drum and Jefferson County since most operational bases have a full-service hospital on-site). One area of concern was the difficulty attracting qualified people in order to expand needed health care coverage. The following is a summary of some of the main points brought up during the interviews regarding health care:

- Health care industry is growing and growth is expected to continue.
- Jefferson County is facing a shortage of nurses, certified nursing assistants, x-ray technicians, and other core health care professionals.
- The relationship with Fort Drum and local service providers is positive for the community. The integration of military families into the community increases demand for hospital workers, nurses, doctors, and other health care providers.
- Jefferson Community College notes that it has a program for nursing certification but that it is very expensive to run. JCC would like to offer more courses, programs, and units but find it difficult to do with existing financial constraints.
- There is a lack of nurse educators as educators are lured away from education because can make more money in a clinical setting, which leads to a lack of nurses and other trained professionals.
- There is a need for increased service providers in specialty fields such as mental health (psychiatrists, psychologists, social workers, etc.) and physical therapy, which is directly related to the healthcare needs of the Fort Drum community.
- Retention and attraction of health care employees has been a problem, which is common in rural areas.
 - Physicians are reluctant to move to rural areas due to concerns about their spouse's ability to find jobs.

- You can achieve a 2-, 4- or 6-year degree in the health care industry within Jefferson County. Education programs include:
 - Bachelors of social work
 - Masters of social work
 - Medical technology
 - Pharmacy technology
 - Phlebotomy technology
- There have been recent upgrades in fiberoptics to connect physicians and integrate them with a regional health care service delivery sub. Other government mandates are requiring major system changes that will increase the demand for professionals with both IT and medical knowledge. This presents an opportunity for future growth of an IT center with a focus on health care.
 - Telemedicine has been a way to manage some of the challenges of not having enough doctors and specialists in rural areas
 - Infrastructure exists but not all regional providers are hooking into it because they are unable to devote the resources necessary to fully integrate.
 - “Last mile” infrastructure does not exist for all of the smaller practices causing disconnect in the system.
 - The Health/Information Technology (HIT) field is changing so rapidly that students going through the current programs do not have the most up to date skills needed and therefore they are not being hired.
 - Skill set that is needed is similar to a process engineer. Knowing what the tool is looking to do and knowing how to optimize the work flow and ease of use.

Housing/ Cost of Living Concerns

The issue of housing affordability came up a number of times during the interviews, both for rental and owner occupied units. There was a recent building boom surrounding the increased stationing at Fort Drum but that has since leveled off. Cost and quality of living is a concern for local economic development because having access to a job is only one aspect of what makes a person decide to move to or remain in an area. To be able to build on the workforce and retain quality people, good quality housing at affordable rates is necessary to achieve economic growth goals.

With so many soldiers based at Fort Drum, it is important that the cost of living and cost/quality of housing is adequate to meet their family’s needs so that they stay even after they are out of the military. Retaining families after they are no longer affiliated with Fort Drum is difficult because the cost of living is significantly higher in NYS/Jefferson County than other parts of the country and once they are out of the military they find it difficult to find a civilian job in Jefferson County that offers salaries comparable to what they were paid at their military positions. These two factors are driving the decision of many former soldiers to choose to move elsewhere. Some of the key concerns surrounding housing include:

- High cost of housing due to high demand.
 - The military provides a higher stipend for the soldiers to find housing, which is driving up the cost.
 - The demand created by Fort Drum for rental and owner-occupied units makes it difficult for those non-military families looking to live in the area.

- The overall housing stock is limited and there is very high demand for housing (i.e. low vacancy rates), which is driving up the costs of even very low quality housing throughout the region.
- Quality throughout the housing market, particularly the rental market, is also being driven by the demand for housing.
 - Because of the high demand for rental units and the ability of the Fort Drum market to pay a high living allowance, property owners are under little pressure to re-invest or even properly maintain their properties to make them more competitive. These trends are allowing many rental units to deteriorate while rental prices remain the same.
- The cost of living and housing is too high for those working in manufacturing/production occupations. The wages/salary provided to military personnel is higher than low- to medium-income jobs for civilians, which is placing increased financial stressors on families.
 - Wages and salary have stagnated in Jefferson County relative to other areas. The “living wage” figure for Jefferson County is higher than many production occupations will pay.
- High levels of construction and construction employment is tied to the expansion at Fort Drum and the subsequent demand for new housing. With the numbers of those stationed at Fort Drum leveling off there is likely to be a decrease in demand for new construction, which could put employers in a position to have to reduce their workforce. In addition, construction leads to other economic impacts throughout the area (services, equipment, and material purchases, etc.) which could be negatively impacted if the levels of construction activity stabilize or decline.

Tourism

The development of the tourism industry is important to Jefferson County as a way to bring new dollars into the local economy and showcase all the positive aspects of the County including the Thousand Islands, downtown Watertown, and all of the rural landscapes throughout the Region. The following is a summary of the main points of the interviews with respect to the tourism industry:

- Demand for hotels in Watertown is primarily driven by the National Reserve and Fort Drum activity in Watertown.
- Tourism industry is focused on the summer season.
- The tourism industry is primarily directed and marketed towards the Thousand Islands Region
 - More of a centralized approach and region-wide marketing is important to be able to bring tourism to the whole area.
 - Need to establish activities for all four seasons throughout the County to reduce the reliance on the Thousand Islands region and the boater market.
- Increased interest in agri-tourism (wineries, distilleries, farm tours, etc.) could boost local activity and build on existing assets.
- Improved trail and recreational resources could help expand tourism industry in Jefferson County.
- State tourism development efforts tend to drive people to the Buffalo area and not the Thousand Islands/Jefferson County region.

Transportation/Infrastructure

Site selectors who are working on behalf of new companies are always considering access and proximity to major transportation routes as well as the existence of high quality and reliable infrastructure (water, sewer, high speed internet, cell phone coverage, etc.) when looking to help their clients with a new

investment or location decision. As part of the interviews, Camoin Associates discussed the quality of the existing infrastructure in Jefferson County to identify if there are any weaknesses that can be addressed to better position the County for economic growth. The following are some of the common responses by economic development professionals and business owners regarding infrastructure in Jefferson County:

- Transportation access via road/interstate is adequate.
- I-81 corridor connecting through to Canada is adequate and highly utilized.
- CSX operates a railroad that travels from Montreal to Syracuse through Watertown, which is very important for distribution and logistics. Railroad infrastructure should be maintained, protected, and marketed to companies as they try to reduce their use of over-road transportation.
 - There is a need to maintain rail spurs to connect industrial parks to the larger rail system.
 - The rail spurs are currently used for both agriculture and manufacturing industries.
- It was noted that the Thousand Islands Bridge that connects Canada to the United States is adequate and provides for quick border crossing, which is good for businesses.
 - Ease of access to Ottawa and Toronto.
- The expansion of the Watertown International Airport has been a benefit for the area.
- The midwest is a better location for many of the manufacturing firms that are distributing nationwide. Manufacturing firms are in Watertown for other reasons besides ease of transportation access.
- High utility cost was mentioned as a challenge by a few manufacturers. Opportunities for alternative energy exist including:
 - Biomass feedstock could be grown in the County
 - Hydro from the Black River (note that significant regulation of hydropower could make this challenging)
 - Biogas or Anaerobic Digester

Workforce Concerns

Workforce qualifications are also one of the major items that are reviewed by site selectors when considering different locations for a business location project; a community with a weak workforce would be immediately disregarded in a search for a new business location or expansion project. Camoin Associates asked the interviewees (business owners, economic development professionals, and others) about their experience with the workforce in Jefferson County and whether there were any skill areas where they were lacking or if there were areas in need of improvement. Unfortunately, some interviewees brought up their concern about how the weak skills and poor attitude of the existing workforce is hindering the potential for economic development and growth. It is important to note that while these are concerns for the Jefferson County area and this CEDS plan outline action items to improve the skills of the local workforce, these are issues that are being faced all over the United States. This issue of workforce came into conversation in a few different ways, which are summarized below.

- One reason for the lack of qualified/trained labor available for manufacturing in the area is because very few high school students consider going into a production occupation.
 - Manufacturers are having trouble filling vacant positions for low and mid range jobs.

- Firms that have operations in other parts of the country that, based on their experience, this lack of interest in manufacturing careers was unique to the Northeast/Jefferson County.
- Firms that also operate in the Midwest note that there are more BOCES programs, high school programs, and vocational training programs that prepare and guide students into the manufacturing occupations. Support for these programs are lacking in Jefferson County.
- Manufacturing occupations are respected and encouraged in other parts of the country, which is different than the attitude in Jefferson County and throughout the Northeast.
- The downturn in the economy has forced more people into manufacturing/production occupations who may not have considered it before. One interviewee noted that they are receiving applicants to their apprentice program that are higher-qualified than they had seen before.
- Some of those interviewed expressed concern about the poor work ethic and lack of desire found in much of the younger generation in the County⁷. Business owners described scenarios where applicants expect to receive higher wages than is reasonable for the positions, applicants do not expect to have to start at the “bottom”, and often do not have the social or technical skills necessary to do the job.
- Small businesses are facing similar issues regarding workforce concerns. There are applicants for the positions but some employers are finding basic social skills lacking, which is unacceptable for most customer service positions.
- Some firms are also finding it difficult to find applicants for managerial and creative type occupations such as graphic designers.
 - One local firm reported the inability to fill a vacant marketing position for over a year as they could not find a qualified candidate.
 - A possible explanation for this could be that the candidates that would be qualified for these positions are looking for a different quality of life in terms of more arts and cultural offerings and other amenities that Jefferson County does not currently provide.
- There is a regional workforce strength in the quality of engineers being trained a regional colleges including Clarkson and Canton.
- In an effort to attract and retain workers, thereby reducing turnover rates, some companies are deliberately seeking employees who are attracted to a rural lifestyle and who are thus more likely to remain in the area.

General Observations

The following is a brief summary of some other points made during the interviews, which are considered important to understanding the multiple layers of the Jefferson County economy:

- Many of the manufacturing companies in Jefferson County are what can be referred to as “legacy companies” meaning that they have been in the County for many years.
 - Legacy companies are in the County for historical or personal reasons that have little to do with any strategic geographic advantage the County has to offer today.
 - These companies employ a significant portion of the overall workforce and losing just one of these companies would be a significant blow to the County’s economy.

⁷ Lack of discipline and work ethic has been identified as a nationwide concern.

- Most of these companies are competing in the global market; the local economic situation has less of an impact on the success of these companies and they do very little business with Fort Drum (if any at all).
- There are a few local trends in the land development industry/process that make Jefferson County less attractive to Developers.
 - Frequent deployments of soldiers from Fort Drum causes market fluctuations, which - through the eyes of a developer - is viewed as high risk.
 - It is common for local municipalities to force developers to pay for infrastructure improvements. This drives up the cost of development and, because this is a common perception among developers about the county, makes the region as a whole less competitive.

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ACTION PLAN NARRATIVE

The Action Plan Matrix included in Section VII of the CEDS provides the outline for the specific goals and action items and what follows is a narrative of the Action Plan that includes more detailed descriptions of the actions and capital projects. The following narrative also includes performance measures to be used by the County to quantify the impact of the Action Plan.

Goal: Develop the local workforce to meet 21st century challenges

A.1: Coordinate efforts between all educational providers to align workforce development with targeted industries

It is vitally important that the existing education systems are teaching the skills necessary for students to be able to succeed in the 21st century job market. Using the Career Pathways approach (a system devised to analyze the skills and training necessary for various occupation/industry choices), the County's schools can develop curricula based on the skills needed for the targeted industries. Having a local population with the skills needed to meet the demands of key industries will make Jefferson County increasingly attractive and will promote economic development. Continue ongoing efforts to coordinate between high schools, JCC, and regional four year colleges and universities to promote lifelong learning and job skill development.

Lead Agency/Partnership: High schools, BOCES, and JCC

Priority Level: High

Timeframe: Ongoing

Performance Measure: Complete educational plan for each targeted sector; Development of curricula/programs and implement

A.2: Create a task force to regularly bring together educators and employers to jointly address emerging workforce needs

Create a task force that includes guidance counselors, teachers, principals, and employers in the effort to address workforce needs by providing them with job, career, and education pathway information for targeted industries. The task force could be used to address technical and academic skill areas that need additional attention as well as soft skills for employees. The task force should be charged with solving the disconnect between the available jobs and workforce skills so that employers are able to fill positions and employees are able to find jobs that meet their interests and skills. An important aspect of the task force is to include a wide variety of educators and employers and bring them together on a regular basis to discuss changes, trends, needs, and concerns before workforce issues become too large.

Lead Agency/Partnership: WIB, JCC, BOCES, and High schools

Priority Level: High

Timeframe: Short

Performance Measure: Attendance at task force meeting; Satisfaction rating by participants

A.3: Encourage internship and apprenticeship partner programs

One way to increase the pool of skilled and experienced labor is to increase the internship and apprenticeship programs that are available and to coordinate between job applicants and employers. This type of program would help to attract employees from regional colleges and could potentially create lifelong county residents. Local companies should be encouraged to participate in these types of programs and should be informed of the benefits of participation. Available internships should be

marketed to regional college department heads so that they can circulate the information to interested students.

Lead Agency/Partnership: JCC, WIB and Regional College Partners

Priority Level: High

Timeframe: Short

Performance Measure: Number of companies participating; Number of internships/apprenticeships provided; Job placement from participation

A.4: Support Science, Technology, Engineering and Math (STEM) training programs

Support for STEM industries and training programs increases the amount and degree of innovation occurring within an economy, which results in increased economic development and wealth creation. Residents with skills that lead to innovation can create unique new products, improve upon existing processes and increase productivity. Jefferson County organizations should continue to support existing STEM training efforts and increase availability wherever possible. JCC should consider applying for financial assistance through the National Science Foundation, which offers grants to community colleges and other institutions of higher learning to increase their ability to deliver STEM education programs and career training.

Lead Agency/Partnership: JCC, North Country STEM Hub, WIB, and BOCES

Priority Level: High

Timeframe: Short

Performance Measure: Amount of money received through application; Number of students through program

A.5: Continue the Jefferson Express Workshops

The Jefferson Express Workshops offered by JCC provide job training, skill building, and mobile technical assistance to rural parts of the County. This program has assisted with resume writing, computer skills, and interview practice for many residents who do not have access to training. The program is in need of additional financial assistance to continue to operate and serve the rural residents of Jefferson County.

Lead Agency/Partnership: JCC

Priority Level: High

Timeframe: Ongoing

Performance Measure: Amount of money raised to continue the Workshops; Number of residents assisted

A.6: Create new and promote existing programs to assist in the transition from military to civilian life for retired military personnel

Jefferson County has a wealth of talent and skill in the retired military personnel who are retiring from service at Fort Drum. Working to help make the transition to civilian life easier will benefit the veterans and the County through increased economic activity and improved quality of life for all. The County should focus on assistance to veterans including how to transition into targeted industries, how to acquire the skills necessary for the current economy and how to start a business. These programs require financial resources to run and the County and transition assistance organizations should pursue additional Federal funds and programs to train and place veterans.

Lead Agency/Partnership: JCIDA, JCC, WIB, and FDRLO

Priority Level: High

Timeframe: Short

Performance Measure: Number of people going through program; Amount of additional funds received

A.7: Develop employee training programs for small employers and new start-ups

BOCES and JCC should work together to provide training to a group of employees from various employers. The ability to group the employees from different employers together will make the program more sustainable and allow for a more wide reaching program. Training programs should include both technical skills, and various managerial and business skills.

Lead Agency/Partnership: BOCES and JCC

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of persons completing training; Satisfaction level of employers

A.8: Develop and promote adequate community support services required for a strong workforce

In order to develop a strong workforce, some communities find it necessary to provide support for employees such as child care, elder care, and transportation alternatives. Support services should be marketed where available and expanded where not.

Lead Agency/Partnership: Transit Providers and Community Action Planning Council

Priority Level: Medium

Timeframe: Mid

Performance Measure: Overall satisfaction of workers and businesses with community support services; Specific items completed

A.9: Establish a connection with Canadian universities to advertise jobs

Increasing the labor pool for hard to fill positions to include applicants from Eastern Ontario could improve capacity at local businesses. Identify universities and colleges that offer programs that relate to the skills needed for Jefferson County's targeted industries and reach out to those entities with career opportunity information for positions that local employers have difficulty filling.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Short

Performance Measure: Connections made; Persons hired

A.10: Increase awareness of available higher education offerings and continue to increase program offerings

Jefferson County has a wide variety of education programs crossing many different disciplines and educational attainment levels. To improve the local workforce and encourage continued learning, the County should continue to market a "lifelong learning" strategy whereby residents are aware of the many available programs (Certificate programs, Associate's degrees, Bachelor's degrees and beyond) through JCC and its higher education partner institutions. County educational providers should recognize and encourage the various ways that residents can attain advanced degrees.

Lead Agency/Partnership: JCC

Priority Level: Medium
Timeframe: Mid
Performance Measure: Number of people receiving advanced degrees

Goal: Cultivate a culture of entrepreneurship

B.1: Expand on existing support networks for entrepreneurs and new businesses, designed to help them grow and compete successfully

Many entrepreneurs and small business owners need business-to-business networking to be able to get their business off the ground and expand. The County should support this kind of networking by recruiting successful entrepreneurs from the community and encouraging them to start an informal network, developed and led by the entrepreneurs (primarily driven by the private sector with support from the public sector). The entrepreneurs could host network events that bring together those with technical skills and those with business ideas to help encourage partnerships and business opportunities. Through this network, a mentoring program can be developed to provide hands-on experiences for budding and existing entrepreneurs. Bringing participants in from regional universities, such as Clarkson, could be the catalyst for significant innovation. Finally, this network can be used by the public sector to identify the skills and assets they need to succeed and how the County can support them.

Lead Agency/Partnership: Chamber of Commerce and SBDC
Priority Level: High
Timeframe: Mid
Performance Measure: Development of network and number of participants; New business start-ups; Venture and angel funding; Patents and intellectual property; Small Business Innovation Research and Small Business Technology Transfer funds received

B.2: Continue to build on existing youth entrepreneurship programs

Encouraging entrepreneurship from a young age is one of the best ways to eventually increase the amount of new businesses and start-ups. The County should continue to expand on entrepreneurship opportunities such as the annual E-Day (Entrepreneur Day) competition, which involves both high school and JCC students, and the Junior Leadership Institute.

Lead Agency/Partnership: Area School Districts and JCC
Priority Level: Medium
Timeframe: Mid
Performance Measure: Number of participants; Level of satisfaction

B.3: Study the feasibility of establishing an entrepreneur incubator space

Incubators have long been a way to bring together start-up businesses and entrepreneurs and offer low cost space and shared support services. In this modern era where much work can be done digitally, existence of the physical incubator is not as important as the support services and networking opportunities afforded by an incubator. Fort Drum, JCC, and SBDC should consider the feasibility of establishing an incubator that is focused on offering services and technical assistance for entrepreneurs looking to start a new business and shared space, if desired. The incubator should be a place to make connections and that offers courses, "lunch and learn" events and other networking opportunities to help support entrepreneurs. The feasibility study should consider the number of interested participants,

need for and cost of space, funding opportunities, and other factors that would impact the success of the incubator.

Lead Agency/Partnership: JCC, JCIDA, and SBDC
Priority Level: Medium
Timeframe: Mid
Performance Measure: Completion of feasibility study

B.4: Promote existing sources of capital and work to find new sources for entrepreneurs

In order to assist new businesses, it is necessary that the County continue to advertise existing sources of funds as well as establish and identify sources of a venture capital fund, angel investment, crowd-sourced funding, or other sources of equity investment available to local entrepreneurs. These may include public or private funds. The County should plan the recapitalization of their microenterprise RLF.

Lead Agency/Partnership: JCIDA
Priority Level: Medium
Timeframe: Short
Performance Measure: Venture and angel capital; SBIR and STTR funding; Grants and loans received; Debt and equity raised

B.5: Establish a more intensive mentoring program and improve regional partnerships

There is additional need for mentoring small businesses (beyond the start-up stage) in their effort to expand their markets and continue to innovate. This mentoring program should focus primarily on production industries and helping business owners expand markets and find growth potential. This type of program would likely work better as a regional effort with surrounding counties and population centers as that will increase available resources and bring more entrepreneurs and mentors together.

Lead Agency/Partnership: SBDC, JCIDA, and JCC
Priority Level: Medium
Timeframe: Long
Performance Measure: Number of mentors; Number of mentees; Level of satisfaction with the program

B.6: Support existing small business assistance programs and transitional classes aimed at Fort Drum retirees and soldiers separating from service

Retired military personnel and their families are often potential entrepreneurs that could have a positive impact on the County with some targeted business support services to help them focus their ideas and use their unique skill set. This will increase the probability that they will remain in the area and will also increase the potential for their business to be a success.

Lead Agency/Partnership: WIB and SBDC
Priority Level: Medium
Timeframe: Ongoing
Performance Measure: Number of participants; Number of persons getting work or starting a business

B.7: Continue training opportunities through the Small Business Development Center

The Small Business Development Corporation offers counseling and training as a core service to budding entrepreneurs and it has had a great impact on many start-up businesses. The SBDC should continue to help with business planning, financial management and human resource issues. The SBDC should also train business owners using a curriculum developed by the State Manufacturing Extension Partnerships based on "innovation engineering" as a way to increase internal innovation and product development.

Lead Agency/Partnership: SBDC and CITEC

Priority Level: Medium

Timeframe: Short

Performance Measure: Number of participants; Level of satisfaction

B.8: Connect with seasonal homeowners looking to start their own business

The recent Thousand Island International Tourism Council survey of seasonal residents indicated 4.5% were interested in owning and/or operating a local business. These seasonal homeowners should be encouraged to look into starting their own business. Local business opportunities and services should be promoted as ways to assist them in achieving their goals.

Lead Agency/Partnership: JCIDA, SBDC, and TIITC

Priority Level: Medium

Timeframe: Long

Performance Measure: Number of persons served; Number considering starting a business

Goal: Develop first-class amenities to support growth (infrastructure, facilities, and alternative energy)

C.1: Complete the Watertown International Airport development plan, addressing both future aviation and corporate park needs

Following the expansion of the County's Foreign Trade Zone and considering its strategic location along the Ottawa-Washington corridor, the demand for corporate park space is expected to increase throughout the region in the coming years. The JCIDA is beginning to examine the feasibility of developing a new corporate park at the Watertown International Airport (WIA). This work should continue and include planning for infrastructure and buildings to enable development of a capital and financing budget as well as marketing.

Lead Agency/Partnership: JCIDA and Jefferson County

Priority Level: High

Timeframe: Short

Performance Measure: Completion of Plan

C.2: Analyze adaptive re-use opportunities for the Mercy Care Center health complex in downtown Watertown

The anticipated closure of Mercy Care nursing home on Stone Street will leave approximately 420,000 square feet of vacant space in downtown Watertown. The City and the Watertown LDC have been proactive about beginning to market this soon-to-be-vacant health care complex by having preliminary discussions with potential developers about redevelopment options. To enhance these efforts, commence a thorough market analysis and feasibility study to identify specific re-use opportunities for

the site such as multi-family housing. As part of this analysis, development costs should be estimated and funding sources identified. Utilize findings from the study to market the site to potential developers.

Lead Agency/Partnership: City of Watertown and Watertown LDC
Priority Level: High
Timeframe: Short
Performance Measure: Completion of evaluation

C.3: Consider expansion of broadband access and "last mile" infrastructure

Leverage utilization of the Development Authority of the North Country's (DANC's) Open Area Telecomm Network (OATN) to expand service capability and redundancy improvements through regional connections. Implement affordable "last mile" technology to ensure high speed broadband connectivity from business locations to main transmission lines.

Lead Agency/Partnership: DANC and FDRHPO
Priority Level: High
Timeframe: Short
Performance Measure: Number of businesses that have broadband access; Access speeds; Number of providers or presence of providers

C.4: Support biomass utilization and development

Jefferson County's abundant farm and forest lands have the potential to provide alternative energy to the region. The biomass cogeneration project at Fort Drum, ReEnergy Inc., presents an opportunity for the region as it will serve as a catalyst for smaller projects by providing the critical mass demand for fuel. Continue to support the ReEnergy Black River project and explore the greater potential for biomass in the region.

Lead Agency/Partnership: JCIDA
Priority Level: High
Timeframe: Mid
Performance Measure: Number of new biomass projects; Funding received

C.5: Participate in planning for long term upgrades to County's electrical distribution and transmission infrastructure

Similar to other communities throughout New York State and the nation, the County's electrical grid infrastructure is dated and is limiting economic growth. Some local energy sources are not able to be transmitted through the existing infrastructure. Additionally, 3-phase power is not available in some of the rural parts of the County, meaning that some farmers are using more expensive power to operate their equipment. The County should have a dialogue with National Grid and state officials to identify areas most in-need of improvements to the electrical grid.

Lead Agency/Partnership: National Grid, State, and Federal Government
Priority Level: High
Timeframe: Long
Performance Measure: Regional and local equipment updates completed

C.6: Feasibility study on anaerobic digester

Tightening environmental regulations regarding methane management and the increasing cost of energy are major concerns for farmers. A centrally located anaerobic digester system that ultimately converts the methane into energy could help to mitigate both of these threats, thus reducing the cost of doing business for farmers. Initiate a study to examine the benefits and barriers to the implementation of centralized or regionalized anaerobic digestion in Jefferson County.

Lead Agency/Partnership: JCIDA
Priority Level: Medium
Timeframe: Long
Performance Measure: Completion of study

C.7: Participate in the North Country Regional Economic Development Council's Cleaner, Greener, Communities Sustainability Plan

Support Essex County in the development of a comprehensive energy sustainability plan for the North Country Region. Completion of this plan will provide the region with access to future energy efficiency and project development funds for local businesses and organizations.

Lead Agency/Partnership: Jefferson County
Priority Level: Medium
Timeframe: Short
Performance Measure: Completion of sustainability plan; Number of meetings attended; Funds received

C.8: Support the development of appropriate alternative energy production facilities utilizing hydro, wind, or solar power.

As part of the County's efforts to improve sustainability as well as quality of life in the region, continue to monitor advancements in alternative energy technology and identify opportunities to implement use of these technologies. Advancements in run-of-river technologies may provide opportunities to further tap local hydropower potential. Local wind resources create the potential for on-site and commercial wind projects, where appropriate. Photovoltaic advances offer greater solar potential for public and private facilities.

Lead Agency/Partnership: JCIDA
Priority Level: Medium
Timeframe: Ongoing
Performance Measure: Alternative energy projects

C.9: Capital Project: Proceed with implementation of Watertown International Airport Master Plan for aviation improvements.

The addition of American Airlines/American Eagle flights to Chicago from the Watertown International Airport has had a very positive reception from local residents and has benefited the business and military community. Continue incremental aviation infrastructure and equipment improvements to support and leverage additional commercial passenger and private aviation services.

Lead Agency/Partnership: Jefferson County
Priority Level: High
Timeframe: Long

Performance Measure: Master Plan project implementation

C.10: Capital Project: Develop and market Watertown International Airport corporate park

Establish a corporate park adjacent to the Watertown International Airport and ensure the site is “shovel-ready” by developing necessary infrastructure. Market the availability of the shovel-ready sites on local economic development websites, such as Drum Country Business as well as regional site selector websites.

Lead Agency/Partnership: Jefferson County and JCIDA

Priority Level: Medium

Timeframe: Mid

Performance Measure: Completion of project, Number of tenants

Goal: Improve business development, communications, marketing, and networking to enhance the economic climate

D.1: Enhance existing business retention and expansion efforts

A more formal evaluation of Jefferson County businesses is needed to support business retention and expansion efforts by ensuring that workforce, financial, space, etc. needs are being met. Expand the Visitation & Outreach Program to increase the number of businesses visited on an annual basis - possibly recruit additional JCIDA staff or staff from partner organizations to assist with this effort. Ensure that legacy businesses are visited regularly and results of each visitation should be systematically tracked for follow up efforts.

Lead Agency/Partnership: JCIDA

Priority Level: High

Timeframe: Ongoing

Performance Measure: Number of businesses visited; Positive ratings of retention efforts by businesses visited; Employment growth by existing businesses; Investment by existing businesses; Number of referrals made

D.2: Continue participation in the "Drum Country Business" regional marketing effort

This partnership markets the collective assets of Jefferson, Lewis, and St. Lawrence County around their shared connection to Fort Drum and the economic opportunities related to post operations, post-related growth, and associated workforce. Targeted industries include light manufacturing, food processing, renewable energy, and back office/call center operations.

Drum Country Business has a very attractive website with relevant information; however, it needs to appear higher in web-searches. “Drum Country” is not a widely recognized term outside the region. Increase the website’s ranking in search results by reviewing and expanding its keywords. Primary keywords should include: economic development, business, incentives, commercial, industrial, workforce, land for sale, starting a business, demographics, targeted industries, wages, map, etc. Regional modifiers should include: New York State, Upstate New York, Central New York, Northern New York, North Country, Jefferson County, Fort Drum, Tug Hill, Northeast, etc.

Lead Agency/Partnership: JCIDA and partners

Priority Level: High

Timeframe: Ongoing

Performance Measure: Number of partnership activities; New Businesses, employment, and investment resulting from effort; Number of website referrals to County websites from Drum Country website

D.3: Public official economic development training

A 2012 workshop for public officials on economic development practices and the nature of the site selection process was well attended and well received. Many participants requested additional training on this and related topics. Conduct additional workshops and training sessions to continue learning opportunities on economic development-related issues.

Lead Agency/Partnership: JCIDA and partners

Priority Level: High

Timeframe: Ongoing

Performance Measure: Number of officials trained; Rating of training; Indication that training improved understanding

D.4: Finalize Canadian Version of JCIDA Website

Jefferson County is well positioned to capitalize on its proximity to Ontario, Canada through business attraction and expansion efforts. Finalize the Canadian version of the JCIDA website and hold a virtual event to launch the website. Once the website has been launched, update it on a monthly basis to maximize search optimization and ensure information is accurate, fresh, and relevant. To drive even more users consider running a low-budget Google Adwords campaign targeted to Ontario, Canada.

Lead Agency/Partnership: JCIDA

Priority Level: High

Timeframe: Short

Performance Measure: Page visits; Information downloaded; Inquiries coming in from website; Length of page visits

D.5: Develop updated marketing materials (including brochure) promoting Jefferson County as a desirable business location

Create an updated brochure that is consistent with JCIDA's newly revamped website, reflecting its color theme, and overall message. Provide meaningful information of interest to site selectors and business executives; profile targeted industries and provide information on the availability of Foreign Trade Zone benefits. Develop fact sheets for each targeted sector and make them available on the website with links to information on workforce and regional assets. Utilize a QR Code to direct people to the JCIDA website; consider developing a mobile-friendly landing page for this QR code.

Hard-copy materials become out of date quickly. For this action to be meaningful, the brochure and fact sheets must contain current, relevant information. Design the materials in a manner so that text and figures are easily updated. Only print enough hard-copies needed for 6 months at a time and update the information every 6 months.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Short

Performance Measure: Number of brochures requested or downloaded; Number of contacts/inquiries made

D.6: Analyze feasibility of a web-based Jefferson County Project Development Portal

To streamline business and property development in the County, analyze the feasibility of a web-based project development portal containing information about community, county, state, permitting and project review processes; financial assistance available; and other information resources.

Lead Agency/Partnership: JCIDA, County, and Municipalities

Priority Level: Medium

Timeframe: Mid

Performance Measure: Completion of analysis

D.7: Increase efforts to attract Canadian firms to the County

Continue to attend Canadian business events to identify and develop relationships with firms that may want/need to be in the US. Continue to be an active member of the Interactive Manufacturing Innovation Network (iMiN). Investigate opportunities to work cooperatively with the other North Country region counties to address common interests in Canadian business recruitment.

Another tool to increase attraction efforts is to make sure the process is as seamless as possible by designating a Canadian liaison who is familiar with all U.S. and State regulations and will assist Canadian businesses with all tax and environmental requirements. On the Canadian version of the JCIDA website, profile the Canadian liaison on the home page.

Lead Agency/Partnership: JCIDA, Thousand Islands International Tourism Council, and Capital Corridor

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of connections; Number of inquiries; Number of business and employment from Canada investing in County; Dollar amount of Canadian investment; Number of promotion efforts; Number participants/consumers; Rating of helpfulness by users

D.8: Facilitate cross-border business-to-business opportunities

Develop partnerships with the Canadian economic development professionals and organizations to create cross-border networking opportunities for U.S. and Canadian businesses. Consider reaching out to the manufacturing industry and identifying possible expansion projects that would benefit from having a U.S. presence and being in Jefferson County. The JCIDA can do this by continuing to network through the iMiN, host and attend trade shows, and build relationships with business professionals and advocates throughout the region.

Lead Agency/Partnership: JCIDA, Thousand Island International Tourism Council, and Capital Corridor

Priority Level: Medium

Timeframe: Ongoing

Performance Measure: Connections made; Number of business in network

D.9: Continue implementation of growth management principles to maintain military and community land use compatibility

Use the FDRLO growth management plan recommendations to share information about development patterns and post activities to prevent encroachment concerns. Continue promotion of maps and planning guides to elevate awareness of potential encroachment conflicts.

Lead Agency/Partnership: County Planning Departments, FDRLO, Municipalities, and NYS Tug Hill Commission
Priority Level: Medium
Timeframe: Ongoing
Performance Measure: Satisfaction ratings with partnership and understanding between Fort Drum and Community; Number of acres involved in encroachment proposals

D.10: Continue to promote the use of Watertown International Airport for passenger service

Following the introduction of American Eagle commercial jet service in late 2011, the number of passengers utilizing the airport has increased significantly. There continues to be opportunity for further local and regional promotion of the airport that could transition into additional flights and destinations at the airport. Consider potential for expanding Canadian market capture rate.

Lead Agency/Partnership: Chamber of Commerce, Jefferson County, and Thousand Islands International Tourism Council
Priority Level: Medium
Timeframe: Long
Performance Measure: Number of annual enplanements; Number of service providers

Goal: Enhance quality of life advantages of the County to support local residents, the workforce, and to facilitate business investment

E. 1: Continue to support 'Buy Local' campaigns and farmers markets

Continue to support the establishment of farmers markets in the County and encourage customers to buy local. Inexpensive support could include assisting farmers with signage, promotion, and identifying new markets. Communication with County residents is important to make sure the farmers markets are meeting their needs and the importance of their support is recognized.

Lead Agency/Partnership: JCIDA, Chambers of Commerce, and Cooperative Extension
Priority Level: High
Timeframe: Short
Performance Measure: Number of farmers markets; Number of customers

E.2: Continually evolve County housing strategy to facilitate response to new unit demand and rehabilitation needs

Housing is a major concern in the County in terms of quality and affordability. The State, region, and County should continue to pursue available financial tools, grants, and housing resources to assist development of new units to meet the County's unique housing demands. County housing organizations should conduct periodic gap analyses to estimate unit shortfalls as the basis for local housing decision-making and continue leveraging rehabilitation funding to further improve the viability of the County's existing housing stock.

Lead Agency/Partnership: DANC, FDRLO, County, and Local Municipalities
Priority Level: High
Timeframe: Medium
Performance Measure: Number of units rehabbed; New housing starts; Housing affordability index (cost relative to income)

E.3: Continue reinvesting in downtowns, community centers and areas with infrastructure

In addition to the City of Watertown, Jefferson County has many smaller downtowns that have experienced decades of disinvestment and are in need of revitalization to improve their viability. Municipalities should undertake pre-development planning and apply for grants that will assist with downtown revitalization efforts. Sources should include the New York Main Street program, Community Development Block Grant program, United States Department of Agriculture Rural Business Enterprise Grants, and NYS CFA opportunities.

Lead Agency/Partnership: Municipalities, with assistance from County Planning Department, regional agencies, and downtown development organizations

Priority Level: Medium

Timeframe: Mid

Performance Measure: Establishment, employment, and population growth in downtown areas; Property value growth in downtowns

E.4: Increase year round arts and cultural offerings

Increasing the number of arts and cultural offerings will benefit residents and also visitors who may want to extend their stay if there were more things to do. Working with a wide variety of arts and cultural organizations throughout the County, expand promotion of calendars of events throughout the year. Particular attention should be given to increasing options in the "shoulder" seasons and family events.

Lead Agency/Partnership: North Country Arts Council and area chambers of commerce

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of events and participants

E.5: Maintain regular communication between Fort Drum and the community

It is crucially important to continue open and regular communication through the FDRLO for partnering on military and community needs, opportunities, and challenges. This communication is the foundation for leveraging new economic development opportunities associated with the Post.

Lead Agency/Partnership: FDRLO, AUSA and FDRLO member organizations

Priority Level: Medium

Timeframe: Ongoing

Performance Measure: Ratings of level of satisfaction and understanding between County and Fort Drum Community; Number of collaborative projects

E.6: Implement recommendations from Fort Drum Regional Transit Needs Assessment

The recently completed Regional Transit Needs Assessment identified a number of recommendations for increased coordination to improve mobility and public transit alternatives to meet workforce commuting needs. All involved organizations and current transit providers should implement these recommendations as a way to improve the quality of life and economic opportunities for residents.

Lead Agency/Partnership: Transit Providers, City of Watertown, and FDRLO Transit Group

Priority Level: Medium

Timeframe: Long

Performance Measure: Needs Assessment recommendations implemented

E.7: Improve government service delivery in key areas that affect business sustainability and growth prospects

Throughout New York State, many communities are looking for ways to reduce their tax burden through local government efficiency studies and dissolution/merger feasibility analyses. Communities in Jefferson County should continue to look to the Department of State Local Government Efficiency program for funds to evaluate means to reduce the cost of local government operations.

Lead Agency/Partnership: Municipalities and School Boards

Priority Level: Medium

Timeframe: Ongoing

Performance Measure: Completion of studies; Implementation of recommendations

Capital Project E.8: Upgrade Emergency Public Safety Radio System

The County's Emergency Public Safety Radio System is in need of upgrades to improve aging technology and to develop a multi-jurisdictional shared radio system.

Lead Agency/Partnership: Jefferson County

Priority Level: High

Timeframe: Short

Performance Measure: Implementation of shared radio system

Goal: Retain, attract, and grow the County's target industries

Target Industry: Manufacturing

F.1: Expand manufacturing collaboration initiatives

Manufacturing collaboratives are typically led by existing manufacturers within a region to leverage the resources and networks to support and grow the sector. Jefferson County's public/private manufacturing collaborative should advocate for and attempt to address the workforce issues and other issues related to their ability to expand and be successful. It is important that the collaborative include county economic development professionals, but should be primarily driven through a private effort to increase the information that is coming directly from those in the field and with the intimate knowledge of the industry needs. The County should build on the success and momentum of the Manufacturers Summit and continue to support similar events.

Lead Agency/Partnership: JCIDA and WIB

Priority Level: High

Timeframe: Short

Performance Measure: Presence of new collaborative

F.2: Develop appropriate youth workforce development programs

Work with local manufacturing firms to determine their workforce needs and develop the appropriate school-based programs to address those needs. Educate students, parents, teachers and guidance counselors on the opportunities in production-related careers. Find creative ways to connect students and educators with local businesses, such as bringing a student or two on business visitations and allow them to see the production facilities. Support funding for BOCES classes that provide the skills needed in manufacturing positions and encourage full enrollment to keep the classes going. Reach out to regional employers for financial assistance or partnerships.

Lead Agency/Partnership: BOCES, WIB, and schools districts

Priority Level: High

Timeframe: Short

Performance Measure: Number of students, counselors, parents participating; Number of students going into manufacturing programs

F.3: Develop appropriate adult workforce development programs

Develop adult-oriented training and certification programs to help address the existing skills gap and challenge posed by an aging workforce. Use information from the industry to necessary skills and make sure the programs are marketed and scheduled to be available to a wide variety of residents.

Lead Agency/Partnership: BOCES, WIB, and schools districts

Priority Level: High

Timeframe: Mid

Performance Measure: Number participating; Number hired by manufacturing firms

F.4: Focus on targeted manufacturing supply industries

Targeting supply chains for the regional manufacturing industry will not only increase job opportunities for County residents but will benefit existing manufacturers by reducing costs. Hold a supplier conference to offer target industry suppliers a more in-depth look at County opportunities and assets for their business development. The County should focus on the full production chain and identify areas where the County could be successful at attracting supporting industries.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of suppliers at conference; Number of connections made

F.5: Attract dairy product manufacturing firms

Jefferson County has a wealth of dairy farms and dairy manufacturing firms that benefit from being located close to their suppliers. Since Jefferson County is a reliable source of raw materials needed for dairy manufacturing, there is an opportunity to grow the dairy manufacturing industry in Jefferson County. Identify firms that are either considering another location in NYS or firms from other parts of the country looking to relocate/expand. The marketing strategy to these firms should focus on Jefferson County's ability to meet the raw material demand of its manufacturers.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of firms attracted

F.6: Support business location and expansion efforts through financial assistance and incentives

Assist new and expanding businesses in accessing the appropriate local, regional, and state programs to facilitate project completion and success.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Ongoing

Performance Measure: Number of expansions and attractions

F.7: Capital Project: Improve and expand rail infrastructure and rail siding availability

Rail infrastructure is an important locational factor for existing and new industries. The rail infrastructure exists in Jefferson County but additional rail sidings are needed to make the sites more attractive. Identify strategic locations/businesses in the County that would benefit from rail sidings and begin planning for installation of sidings in these locations. Monitor state and federal resources to identify funding opportunities for such projects.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of additional rail sidings

Target Industry: Tourism, Accommodation, Food Services, and Retail Trade

G.1: Continue to develop, enhance, and market recreational opportunities

Jefferson County has a wide range of high quality recreational resources such as trails, state parks, water access, beaches, and many more. These resources are wonderful assets for the County and communities should continue to pursue grant opportunities for public recreation resource development, such as trails, park lands, and waterfront access. The County should continue to support and develop recreational opportunities and resources.

There are many ways to disseminate tourism and recreation information. Technology and new media should continue to be utilized in addition to traditional hard-copy marketing materials. Consider mobile apps that inform visitors of nearby attractions.

Lead Agency/Partnership: Municipalities, area Chambers of Commerce, trail organizations, and Thousand Islands International Tourism Council

Priority Level: High

Timeframe: Short

Performance Measure: Increase in trail mileage; Number of venues; Number of events; Number of visitors to recreation areas; Money spent on recreation; Length of average overnight stays

G.2: Continually enhance promotion of the Thousand Islands-Seaway Wine Trail and Thousand Islands Agricultural Tour

The Thousand Island-Seaway Wine Trail and the Thousand Islands Agricultural Tour have been attracting visitors to the region to experience the unique wine and value added products that come from local farms and vineyards. The organizations should continue marketing projects focused on agri-tourism and develop a forum for cooperative marketing that integrates agriculture and local foods into the County's tourism industry.

Lead Agency/Partnership: Thousand Island International Tourism Council and Thousand Island Seaway Trail Association and JCIDA

Priority Level: High

Timeframe: Short

Performance Measure: Number of visitors; Amount of money spent by visitors

G.3: Continue to market the Greater Watertown area as an international retail destination

The Watertown area has become known as a major regional retail destination for consumers which has led to the development of a significant amount of retail and service sector businesses. Local tourism promoters and chambers of commerce should continue to reach out to regional and international consumer markets within driving distance to attract consumers to the Greater Watertown area.

Lead Agency/Partnership: Thousand Islands International Tourism Council and Chamber of Commerce

Priority Level: High

Timeframe: Short

Performance Measure: Number of visitors to Watertown; Sales tax revenue

G.4: Consider a retail recruitment strategy

The County should work to identify other retailers that might want to locate a new store in the Watertown area and target them for attraction. Retail recruitment efforts include targeting retailers that would appeal to a local and international consumer. Increasing the amount and variety of offerings will support other retail in the area and make the City and County an even larger service center.

Lead Agency/Partnership: Chamber of Commerce

Priority Level: Low

Timeframe: Long

Performance Measure: Number of connections made; Number of new businesses established

G.5: Facilitate and encourage investment in public and private tourism infrastructure to achieve standards comparable to competing destinations

Public and private investment in tourism infrastructure is necessary to continue to attract new visitors, increase visitor stays and improve on visitor return rates. Upgrades for planned resort and hotel projects and re-developments should be encouraged. Improvements to municipal infrastructure to increase viability of private resort\hotel investments are also needed. Particular focus should be placed on specific tourism hub communities where the highest potential interest exists for additional tourism development.

Lead Agency/Partnership: Municipalities and TIITC

Priority Level: Medium

Timeframe: Mid

Performance Measure: Public and private money invested in new infrastructure

G.6: Continue development of hospitably sector workforce needs

With such a large retail and food service industry, Jefferson County industry should work to differentiate itself from other retail and hospitality destinations by providing impeccable customer service. Customer service skills can be improved through certificate programs and community college courses that target the hospitality sector and related skills. Improvements in these areas will increase the length of visitor stays, improve quality of life for residents and increase sales at local businesses and restaurants.

Lead Agency/Partnership: JCC and BOCES

Priority Level: Medium

Timeframe: Mid

Performance Measure: Customer service satisfaction levels; Number of students completing program

G.7: Commission Jefferson County Multi-Use Facility feasibility study

Conduct a feasibility study to analyze the development of a multi-use facility for large community events, concerts, and other large functions. This type of facility would add a new venue to host art and cultural events. The findings of the feasibility study should be considered and funds sought for implementation if feasible. See also goal/action I.5.

Lead Agency/Partnership: JCC Foundation and others
Priority Level: Medium
Timeframe: Mid
Performance Measure: Completion of feasibility study

G.8: Pursue continuing implementation of recommendations of recently completed Local Waterfront Revitalization Plans and the Black River Blueway Trail Plan

A major recreational resource for the County is its myriad of waterfronts. Planning and marketing efforts should continue to maximize recreational utilization of the Black River, Lake Ontario, St. Lawrence River, and Indian River Lakes. Maximizing the recreational use of these resources by implementing the findings of the plans will improve local quality of life and increase visitation to the area.

Lead Agency/Partnership: Municipalities
Priority Level: Low
Timeframe: Long
Performance Measure: Specific plan items completed

Target Industry: Agriculture

Action H.1: Develop and market local value-added products

Value added agricultural products can generate higher profits. County organizations can assist farmers with making this transition and help with marketing and promotion of Jefferson County products. Key to success will be finding ways to differentiate Jefferson County and North Country products from other regions. Successful marketing will require high levels of visibility, accessing major and minor food markets, and developing unique but highly accessible products that the public wants. Tourists and residents alike are putting more emphasis on local products and are willing to pay a premium for such products.

Lead Agency/Partnership: JCIDA and CCE
Priority Level: High
Timeframe: Short
Performance Measure: Production output; Value/sales of production; Export volume

H.2: Improve production capacity of commodity and specialty crops and assist farms with diversification and new business startups

Jefferson County has additional potential to increase commodity and specialty crop production such as corn, soybeans, grapes, hops, vegetables, maple syrup, and honey. Any effort to help farms increase their production of these crops will be beneficial to the local economy and will help farmers diversify their production. Assistance can come in the form of cooperative training programs, equipment sharing

and workforce training assistance to help farmers increase their specialty crop production and increase their profits.

Lead Agency/Partnership: JCIDA and CCE

Priority Level: High

Timeframe: Short

Performance Measure: Amount of commodity and specialty crop production

H.3: Investigate the potential for biomass feedstock crop production

Biomass as an alternative energy source has the potential to grow in Jefferson County. The production of these crops could encourage the utilization of marginal farmlands to meet the anticipated demand for biomass fuel while providing an additional source of revenue to landowners.

Lead Agency/Partnership: JCIDA and CCE

Priority Level: High

Timeframe: Mid

Performance Measure: Completion of assessments/feasibility analysis; Amount and value of biomass crop growth

H.4: Address needs of the dairy industry

Jefferson County has a history and strength in the dairy industry that should be supported and encouraged to grow. There are unique needs and opportunities within the dairy industry that when addressed will allow for greater profitability and improved economic impact on local communities. The regional cluster of dairy product producers has been growing and Jefferson County is well positioned to capitalize on this cluster. The JCIDA's agriculture division can continue to assist with marketing, promotion, and technical assistance as farmers move into more value added product manufacturing. Keeping an open dialogue with the farmers will be necessary and important moving forward so that JCIDA and support organizations can help address future opportunities.

Lead Agency/Partnership: JCIDA, CCE, SWCD, and USDA

Priority Level: High

Timeframe: Short

Performance Measure: Number of dairy farms; Dairy farm sales

H.5: Maintain and expand agricultural economic development efforts

In addition to the dairy sector, the broader agriculture industry is important to the County's identity and economic climate. The County's agricultural representatives should work to maintain and expand efforts to assist in the retention, growth, and promotion of Jefferson County's entire agricultural industry and to increase the profitability of farming in the County.

The County should work with existing and new agricultural businesses to identify and address issues that impede success. Hearing from the agriculture industry could help to identify cooperative solutions that could address larger issues surrounding the need for expensive farm equipment, need for processing facilities and how to handle environmental regulations. Working together will help to strengthen the agriculture industry community and will facilitate practical solutions.

Lead Agency/Partnership: JCIDA, CCE, and Farm Bureau

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of clients served by JCIDA; Level of client satisfaction

H.6: Update the County's Agricultural and Farmland Protection Plan

The County's Agriculture and Farmland Protection Plan will be eligible for a State-assisted update in 2013. The update will allow the County to re-examine pressures on its agriculture land resource base and refine measures to maintain and improve the viability of local agricultural production.

Lead Agency/Partnership: JCIDA, AFPB, and County
Priority Level: Medium
Timeframe: Short
Performance Measure: Completion of updated plan

H.7: Develop appropriate agriculture workforce development programs

Cornell Cooperative Extension is a great partner to the Jefferson County agriculture community. They offer training classes to farm employees to help create a workforce that can meet the needs of a changing and advancing agricultural industry. This type of training program (and ones offered through other avenues) will be necessary to help farms change with the times and continue to be successful. Consulting with the farmers and those in the industry about what type of training is necessary will be important so that the programs are effective and efficient.

Lead Agency/Partnership: JCIDA, CCE, and WIB
Priority Level: Medium
Timeframe: Mid
Performance Measure: Employment growth; Opinion of businesses on workforce availability and quality of workers; Length of time to fill openings

H.8: Promote existing sources of capital and work to find new sources to assist with the capital project needs of agriculture

Agriculture is a capital intensive industry and the farmers do not always have the funds necessary to make needed upgrades. From dairy farms to vegetable growers, there is a need for financial and technical assistance for these producers interested in growing their production capability. The County should explore funding opportunities on behalf of the farmers to find ways to increase the amount of capital that is available for upgrades and expansion projects in the agriculture industry.

Lead Agency/Partnership: JCIDA
Priority Level: Medium
Timeframe: Long
Performance Measure: Number of farms assisted

H.9: Capital Project: Expand rail siding infrastructure

An additional agriculture rail siding facility will support the transport of commodity crops to outside markets and expand the production capacity of the entire region.

Lead Agency/Partnership: JCIDA
Priority Level: High
Timeframe: Medium
Performance Measure: Number of rail siding developed

Target Industry: Health Care and Social Assistance

1.1: Develop a training cost sharing model to increase the pool of needed health care workers

Nursing and health care programs are very expensive to run due to the high cost of equipment necessary for these types of classes. Recruit assistance from regional medical care providers and other sources to help pay for the cost of nursing and health care programs at JCC. Cost of supplies, cost of teachers, and other costs related to training could potentially be covered by regional sponsors who would benefit by having a larger pool of well-trained labor. The involvement of regional medical care providers will result in a better trained workforce that will possess the specific skills desired.

Lead Agency/Partnership: JCC, FDRHPO, and WIB

Priority Level: High

Timeframe: Short

Performance Measure: Completion of model, dollars spent for training, number of persons trained, number of persons hired following training

1.2: Offer tuition repayment or other incentives attract and retain top nursing educators

It is difficult to attract and retain nursing educators because of the potential for higher pay in an urban clinic setting. Identify possible incentives for nursing educators to stay in Jefferson County, such as tuition repayment or tuition remission for family members.

Lead Agency/Partnership: JCC and FDRHPO

Priority Level: Medium

Timeframe: Long

Performance Measure: Number of persons receiving subsidy and being retained or attracted

1.3: Hold an annual health care industry summit

Each year, bring together health care providers from all aspects of the profession to gather information on their training needs, workforce issues, and opinions on directions of the industry. This summit should be targeted to health care providers in Jefferson County and throughout the Upstate New York region. Empower health care employees at all levels to get involved, including students of health care disciplines.

Lead Agency/Partnership: FDRHPO, JPO, and RHA

Priority Level: Medium

Timeframe: Short

Performance Measure: Completion of summit, satisfaction scores of summit participants, number of participants

1.4: Continue youth shadowing internships

FDRHPO provides paid internships for local youth interested in the health professions. Such experiences help to encourage the pursuit of healthcare related careers as well as educate the students on the opportunities available in the community. The students that participate in these programs are more likely to return to the area after their education, thereby aiding long-term recruitment of health care providers to the area.

Lead Agency/Partnership: FDRHPO and RHA

Priority Level: Medium

Timeframe: Ongoing

Performance Measure: Number of participants

I.5: Conduct a feasibility study for Coffeen Street Higher Education Multi Use Complex

There is a demand for additional health care classes at JCC. However, without adequate lab space, JCC is precluded from offering different sessions and more programs. Explore the potential for the Coffeen Street Higher Education Multi Use Complex to include lab space that would allow JCC and regional partners to expand their nursing program. See also multi-purpose facility, Goal/Action G.7.

Lead Agency/Partnership: JCC, City, and County

Priority Level: High

Timeframe: Mid

Performance Measure: Completion of feasibility study; Implementation of project; Number of tenants

Target Industry: Information Technology

J.1: Develop a technology training and internship program to promote and support the use of new technologies in local businesses

A technology training and internship program should be developed to assist small businesses with incorporating innovative uses of information technology to further their business. Local students (high school or college interns) could work with business owners to help them adapt to the changing technology and marketing climate. Training topics that local businesses can benefit from include creating a business website, internet advertising, and the use of social media. It is vitally important for instructors to keep the training material current and relevant.

Lead Agency/Partnership: JCC and BOCES

Priority Level: High

Timeframe: Short

Performance Measure: Participants in program; Satisfaction with program; Skill improvement of participant

J.2: Pursue funding for Health Care Information Management/Technology Certificate

In Jefferson County, there is a growing need for workers with both healthcare and IT skills. Work to develop on-the-job training or internship programs to ensure adequate supply of labor skilled in both health care and information technology. This type of certificate program will produce a workforce with the skills to support the growing health care industry through continual advancements in technology and the full utilization of the available systems throughout the region's health care centers.

Lead Agency/Partnership: JCC and FDRHPO

Priority Level: High

Timeframe: Mid

Performance Measure: Number of participants; Number of participants hired after trained

J.3: Start an information technology peer group

As noted above, information technology is constantly in flux. As such, this is an area where learning from other practitioners is highly useful. Recruit one or two people in the industry who would be interested in establishing a group to share information, offer workshops to teach each other skills, self direct

conversation, industry advocacy, collaborate and encourage innovation. After establishment, this group should be run by industry practitioners, not by economic development organizations.

Lead Agency/Partnership: JCIDA

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of participants; Level of satisfaction; Connections made

J.4: Identify and develop IT skills needed in non-IT industries

Most IT occupations are in fields other than traditional information technology industries. These industries, such as health care and manufacturing, have needs for individuals with IT skills. Include non-IT industries in the review of skills and workforce needs and develop training programs to develop the specific skills needed in these industries.

Lead Agency/Partnership: WIB, BOCES, and JCC

Priority Level: Medium

Timeframe: Mid

Performance Measure: Number of participants in program; Satisfaction with program; Skill improvement of participants

Target Industry: Call Centers, Back Office Support Industries (Finance, Insurance, Real Estate)

K.1: Market the community's advanced telecommunications infrastructure and available labor force to attract back office operations

Strategically identify business sectors and classifications that would benefit from the configuration and characteristics of Open Access Network (OAN). Market the reliability of the OAN system, including the very low-potential for natural hazards in Jefferson County that could disrupt the system. This is also a target industry in the regional Drum Country Business marketing effort.

Lead Agency/Partnership: JCIDA and Drum Country Business

Priority Level: High

Timeframe: Mid

Performance Measure: Number of business connections; Number of businesses attracted

K.2: Begin a targeted marketing strategy for call center operations based on targeted industries and workforce capacity

Meet with existing call center operators to discuss current needs, possible expansions, incentive programs, and other possible collaborations that would allow them to expand their current operations.

Lead Agency/Partnership: JCIDA and Drum Country Business

Priority Level: Medium

Timeframe: Mid

Performance Measure: Level of satisfaction of existing call center operators; Number of new operators attracted

ADDITIONAL INFORMATION & REFERENCES

Future Jobs - Projections vs. Predictions

It is important to understand the difference between projections and predictions. Projections provided in the previous sections are informed guesses based on past and current trends. EMSI creates long-term, 10-year industry projections starting from the current year (2012 for this particular report). Industry projections are based on a combination of:

- Recent trends in all industries for local geographies
- National industry projections produced by the Bureau of Labor Statistics (BLS)
- Regional projections produced by states (i.e. the New York State Department of Labor)

Most industries are projected by tracking recent county-level trends using a linear regression function based on data from 15, 10, and 5 years prior to the base year. Once this is done, state and local government industries are projected considering expected growth/decline of the local economy (rather than regression). It is also important to point out that federal government industries, including the military, are projected through linear regression at the national level. Once these initial projections are completed, EMSI performs a number of controls and adjustments based on other data sources including BLS and any state-level data that is available. While EMSI has one of the leading economic models available, no one can predict the future state of the economy.

Converting Jobs by Industry to Jobs by Occupation

EMSI converts jobs by industry to jobs by occupation using a regionalized staffing pattern model, specific to each sub-state Occupational Employment Statistics (OES) region. Staffing patterns demonstrate the kinds and percentages of occupations employed within a particular industry. For example, a retail trade industry could be made up of all sorts of occupations from regional store managers to sales clerks to maintenance workers.

EMSI starts with ratios derived from the National Occupation Matrix (a national staffing pattern published by the Bureau of Labor Statistics) and inputs regional jobs by industry data into the matrix (based on actual survey data). The matrix converts jobs by industry into jobs by occupation based on the national matrix. Ratios in the matrix are adjusted so that jobs by occupation generated by the matrix equal occupation totals for the region. In some cases, EMSI's county level occupation numbers, especially in government, might be influenced by industry occupation patterns of the larger OES region. An example may be if there is a prison in the region, staffing patterns for the industry "state government" may be influenced in a neighboring county that does not have a prison. This occurs because state government employment is not available in more detail (e.g. state prison vs. state university employment).

Total Jobs vs. Openings, Why look at both?

While "jobs" refers to the total number of positions in a region, "openings" represents the sum of **new and replacement jobs** in the position. Replacement jobs are estimated based on average turnover rates for particular an occupation (e.g. workers switching occupations, retiring, receiving promotions, etc.). Certain occupations have much higher turnover rates than others. For example, a good portion of wait-staff and retail cashier occupations are often filled by high school or college students who may only work in the position for a summer or semester, which drives the openings number up. It is important to consider new and replacement jobs for an occupation rather than just change in total jobs because there can be instances when there is occupational demand while at the same time the pool of total jobs is shrinking.

A Deeper Look into NAICS 55: Management of Companies & Enterprises

From 2001 to 2012, the management of companies and enterprises industry lost over 700 jobs in Jefferson County. During an initial review of this EMSI data, members of the CEDS Steering Committee were unable to pinpoint the source of this significant job loss. To understand what the EMSI data is showing, Camoin Associates conducted additional research and data verifications. The results are summarized below.

EMSI industry data at the 6-digit NAICS level shows that almost all of the job loss during this time period occurred within NAICS 551114: corporate, subsidiary, and regional managing offices (referred to as the “managing offices industry”).

Industry Breakdown of Historic Change in NAICS 55				
Jefferson County				
NAICS	Industry	2001 Jobs	2012 Jobs	2001-2012
55	Management of Companies and Enterprises	920	160	-760
551111	Offices of Bank Holding Companies	0	0	0
551112	Offices of Other Holding Companies	72	<10	-70
551114	Corporate, Subsidiary, and Regional Managing Offices	848	160	-689
Economic Region				
NAICS	Industry	2001 Jobs	2012 Jobs	2001-2012
55	Management of Companies and Enterprises	4,188	2,988	-1,200
551111	Offices of Bank Holding Companies	0	<10	<10
551112	Offices of Other Holding Companies	211	230	19
551114	Corporate, Subsidiary, and Regional Managing Offices	3,976	2,751	-1,225

Source: EMSI

The NAICS definition of the managing offices subsector is:

This U.S. industry comprises establishments (except government establishments) primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise. These establishments normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. Establishments in this industry may hold the securities of the company or enterprise.⁸

Corresponding index entries for this industry include:

- Centralized administrative offices
- Corporate offices
- District and regional offices
- Head offices
- Holding companies that manage
- Subsidiary management offices

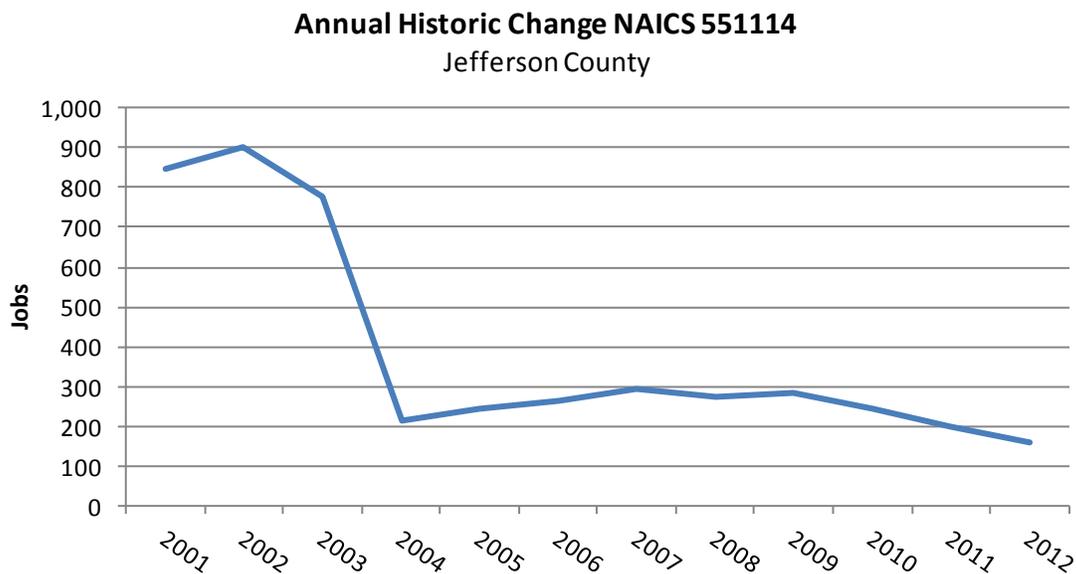
⁸ NAICS Association <http://www.naics.com/censusfiles/ND551114.HTM>.

According to EMSI data from 2001-2012, the significant change in the management offices industry was not a gradual change; it dropped off between 2003 and 2004 when the industry went from 779 jobs to 214 jobs.

Annual Historic Change in NAICS 551114 Jefferson County	
Year	Jobs
2001	848
2002	900
2003	779
2004	214
2005	244
2006	266
2007	292
2008	274
2009	283
2010	245
2011	198
2012	159
Change 2001-2012	-689

Source: EMSI

NAICS 551114: Corporate, Subsidiary,
 and Regional Managing Offices



Industry data from the New York State Department of Labor (DOL) one of the primary data sources EMSI uses to develop its industry data shows a similar decline occurring between the fourth quarter of 2003 and the first quarter of 2004. The DOL data also provides the number of reporting units or number of establishments reporting for the industry. As shown, the number of reporting units went from 37 in the third quarter of 2003 to 11 in the fourth quarter (change shown in the yellow in the table below). An

analyst at the DOL suggested that the change in reporting units may be a result of some businesses being reclassified under a different NAICS code, which would explain the 'drop' in employment.

DOL Data on Historic Trends for NAICS 551114 in Jefferson County				
Year	Quarter	Reporting Units*	Average Employment	
2010	Annual	15	220	
2010	1	14	212	
2010	2	14	222	
2010	3	15	226	
2010	4	15	220	
2009	Annual	15	257	
2009	1	14	241	
2009	2	15	258	
2009	3	15	265	
2009	4	15	265	
2008	Annual	14	249	
2008	1	14	252	
2008	2	14	249	
2008	3	14	250	
2008	4	14	245	
2007	Annual	15	266	
2007	1	15	257	
2007	2	15	265	
2007	3	15	269	
2007	4	15	272	
2006	Annual	15	245	
2006	1	15	243	
2006	2	15	246	
2006	3	15	251	
2006	4	15	241	
2005	Annual	12	224	
2005	1	12	211	
2005	2	12	221	
2005	3	12	231	
2005	4	12	232	
2004	Annual	11	197	
2004	1	9	188	
2004	2	11	176	
2004	3	12	215	
2004	4	12	210	
2003	Annual	24	724	
2003	1	11	745	
2003	2	11	757	
2003	3	37	714	
2003	4	36	680	

Source: NYS Department of Labor, Quarterly Census of Employment and Wages (QCEW) <http://www.labor.ny.gov/stats/ins.asp>.

* Reporting Units - Term used by DOL for number of establishments.