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SOUTHERN TIER 8 R E G I O N A L B O A R D

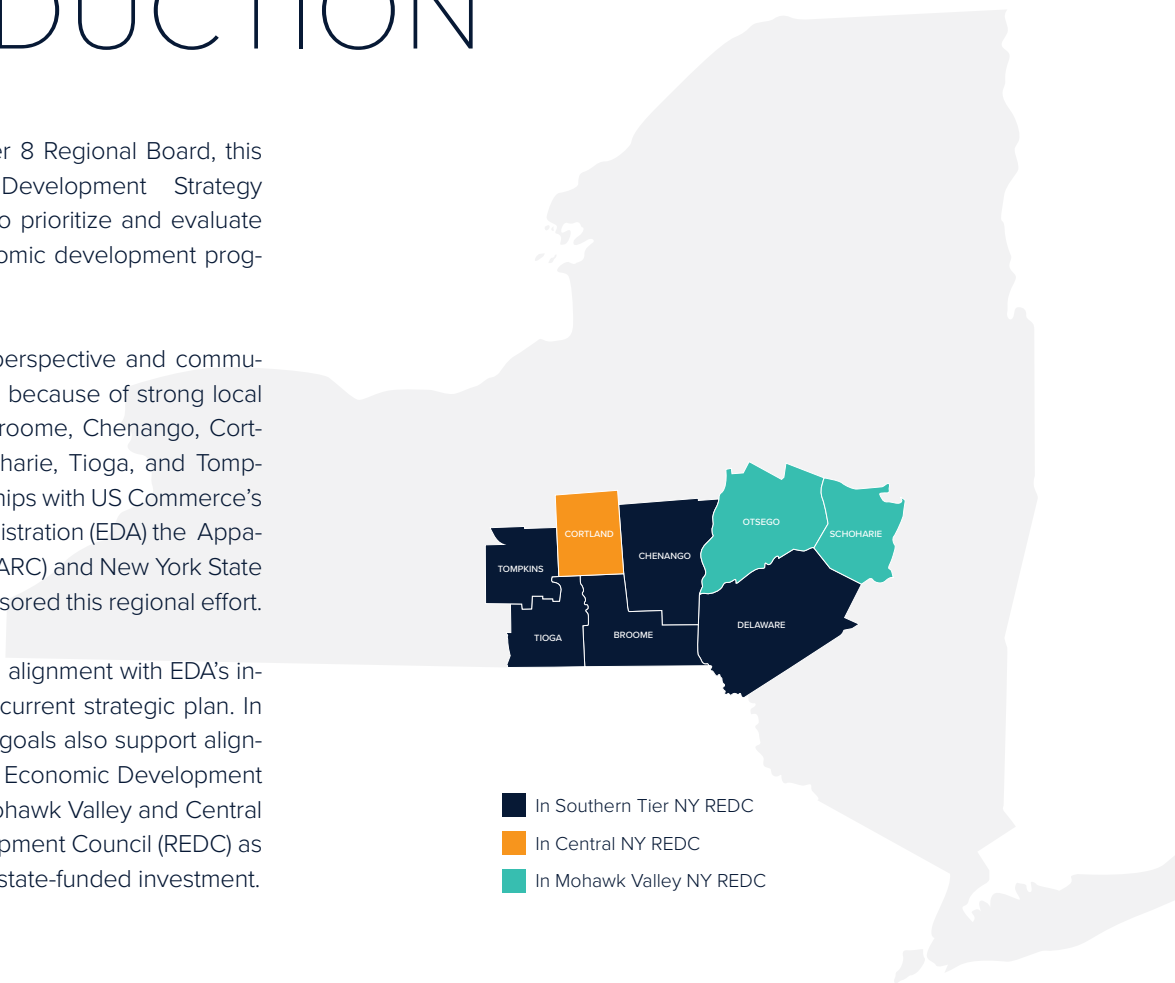
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
FIVE YEAR PLAN 2023-2028

INTRODUCTION

On behalf of the Southern Tier 8 Regional Board, this Comprehensive Economic Development Strategy (CEDS) has been developed to prioritize and evaluate regional community and economic development progress over the next five years.

This economic development perspective and community design effort was possible because of strong local partnerships with leaders in Broome, Chenango, Cortland, Delaware, Otsego, Schoharie, Tioga, and Tompkins Counties, federal partnerships with US Commerce’s Economic Development Administration (EDA) the Appalachian Regional Commission (ARC) and New York State Department of State, who sponsored this regional effort.

In this 5-year plan, one will find alignment with EDA’s investment priorities and ARC’s current strategic plan. In addition, many of the regional goals also support alignment with the State’s Regional Economic Development Plans (for the Southern Tier, Mohawk Valley and Central NY Regional Economic Development Council (REDC) as established in 2011, to support state-funded investment.



OUR MISSION

To partner with member counties to identify and address multi-county issues in order to improve the quality of life.

THE ROLE OF THE REGIONAL BOARD:

- 1 PRIORITIZE ANNUAL FEDERAL INVESTMENTS** of the ARC and EDA that support self-sustaining and alignment of local economic development initiatives. *Ex.) Area Development Program*
- 2 PROMOTE COLLABORATION** with partner organizations and strategic ecosystem development. *Ex.) Regional Broadband Collaborative, New Energy New York Tech Hub, Broome Tioga Stormwater Coalition, and Recovery-to-Work Workforce Development*
- 3 PROVIDE EDUCATION AND NETWORKING OPPORTUNITIES** to support economic & community development with public and private sector stakeholders. *Ex.) Industry Summit Platform, So-Tier Regional Portal*

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THE PLAN

THE REGION'S VISION FOR ECONOMIC GROWTH

STRATEGIC ALIGNMENT FOR ADVANCEMENT

With a 2023 national designation as North America's Tech Hub for Battery Innovation, considerable private and public sector investment in the region, the community now has a generational opportunity to change the trajectory of economic growth. The CEDS partners aim to support the advancement of the battery manufacturing Tech Hub with the New Energy New York (NENY) Coalition over the next decade with community engagement programs, strategic access to federal partners, and continued workforce development with local high schools, BOCES, Universities, Community Colleges, Workforce Development Boards, Chambers, local Planning Departments and IDAs for site development, community planning, and infrastructure improvements.

COMMUNITY HISTORY

Over the last 30 years, the region has been significantly impacted by global shifts in the manufacturing industry. Since 1993, several headquartered manufacturers closed plants across the region (including IBM and Proctor & Gamble Pharmaceuticals) resulting in a loss of talent, private investment, community pride, hope and institutional knowledge for growth, with an impact on supply-chain businesses, school districts, neighborhoods and lifestyles. However, over the last decade, leadership across education, business, established manufacturers, new entrepreneurs, non-profit and government have been working together to align the available talent, assets and resources. Over the last few years, despite the global pandemic challenges, the collaborative efforts are being recognized, and economic growth is starting to trend upwards.



IBM Campus - Endicott, NY - Broome County.

MILESTONES IN INNOVATION ECOSYSTEM RE-DEVELOPMENT

2010 The New York Battery and Energy Technology (NYS-BEST™) Consortium was established to assist with access to financing, manufacturing, technology development, research and developing public and private partnerships across the state.

2013 New York Empire State Development (ESD) opened a Start-Up New York **tax incentive** & shared resource program to support entrepreneurial growth with participating colleges & universities.

2016 New York State identified the Southern Tier as a clean energy manufacturing destination with the **76 West business competition**, to boost entrepreneurial growth across the region, and support best practices in emission reductions.

2017 The **Southern Tier Koffman Incubator** opened with start-up workspace to support a variety of industries and developed the Clean Energy Incubator (CEI), financially supported by New York State Energy Research and Development Authority (NYSERDA).

2017 IM3NY lithium-ion battery consortium announced.

2019 M. Stanley Whittingham was awarded the **Nobel Prize in Chemistry** for his development of lithium-ion batteries

2018 The region defined **industry cluster** support goals in the 2018-2023 CEDS

2019 **Fourth Wave Initiative** released (Three Rivers Development Corp, The Agency & Team Tioga)

2021 **Clean Energy Industry Cluster Strategy** & Database released (Tier Energy Network; supported by ST8 and ARC).

2022 **Otsego Innovation Center** opened as an acceleration center for tech entrepreneurs and startup companies in the manufacturing and technology industries.

2022 **\$1 million Strategic Plan Development and Industrial Site Development Investment** across the Southern Tier (ST8 Regional Board & ARC, Infrastructure Investment Jobs Act, IJJA)

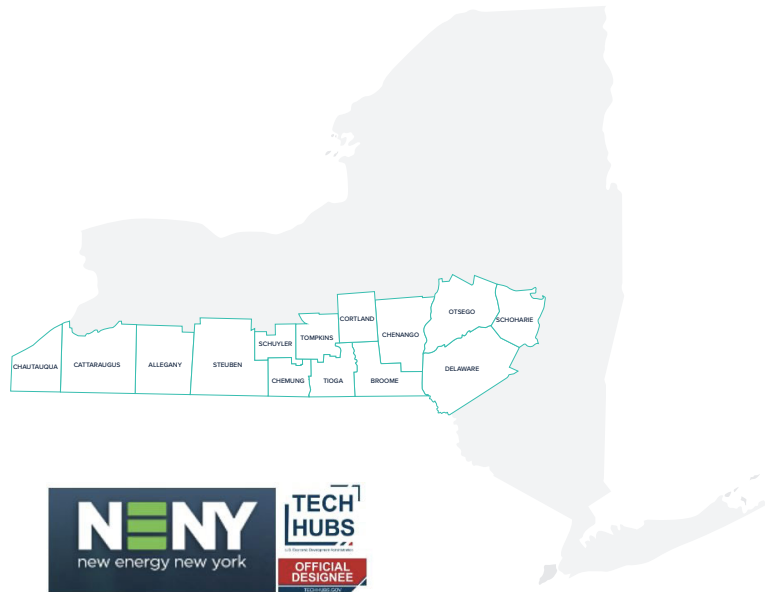
2022 **IM3NY Gigafactory** opened for manufacturing & commercial production started in Endicott, NY. \$180K Private Sector Investment...Jan 28, 2025 filed for bankruptcy.

2022 **New Energy New York** was selected as “**1 of 21**” communities across the USA to rebuild America’s manufacturing supply chain. Binghamton University received an investment of **\$63 million** (matched by **\$50 million** from New York State, under the **EDA Build Back Better Regional Challenge** (FY21 American Rescue Plan). Additional workforce training development of **\$1 million investment** (ST8 Regional Board & ARC, IJJA).

- ✓ Manufacturing Training Program underway (Broome Tioga Workforce [BTWD], Southern Door Community Land Trust)
- ✓ Battery and Energy Storage Supply Chain Database Launched (NY BEST, New York Battery and Energy Storage Technology Consortium, AM&T)
- ✓ Battery Academy launched (Binghamton University, SUNY Broome, Broome Tioga BOCES & BTWD)
- ✓ Innovation Lab Pre-Accelerator, Accelerator & Market Accelerator launched (Binghamton University, Activate, The Clean Fight, Koffman Incubator, NYBEST)
- ✓ Youth Accelerator Program launched (Incubator Works)

2023 **Binghamton University** and **New Energy New York** was selected as “**1 of 31**” communities across the USA to receive a **Regional Innovation and Technology Hubs (Tech Hubs) designation** through the U.S. Department of Commerce’s Economic Development Administration. This designation is designed to “bolster battery technology development and manufacturing across the entire value chain” to accelerate America’s Clean Energy Transition.

NEW ENERGY NEW YORK BATTERY INNOVATION TECH HUB



“TECH HUB” DESIGNATION

The Tech Hub program is an economic development initiative designed to drive regional innovation and job creation by strengthening a region’s capacity to manufacture, commercialize and deploy technology that will advance American competitiveness.

EDA’s 2023 designation for the Southern Tier “brings together diverse public, private, and academic partners into collaborative consortia focused on driving inclusive regional growth.” With their existing **innovation assets as a foundation**, these Tech Hubs will build the **workforce of the future**; enable **businesses to start and scale**; and **deploy and deliver critical and emerging technologies**.

“This Tech Hub will expand on the momentum of a growing battery manufacturing cluster in the Southern Tier of New York by engaging with the state’s first battery gigafactory, the region’s 700+ small and medium-sized manufacturers, and the nation’s first battery pilot manufacturing and development center. The NENY Battery Tech Hub seeks to address critical gaps in the domestic battery supply chain and meet the growing demand for energy storage, a crucial part of the clean energy transition.”

<https://newenergynewyork.com/>

BENEFITS OF TECH HUB DESIGNATION

CURRENT TECH HUB BENEFITS:

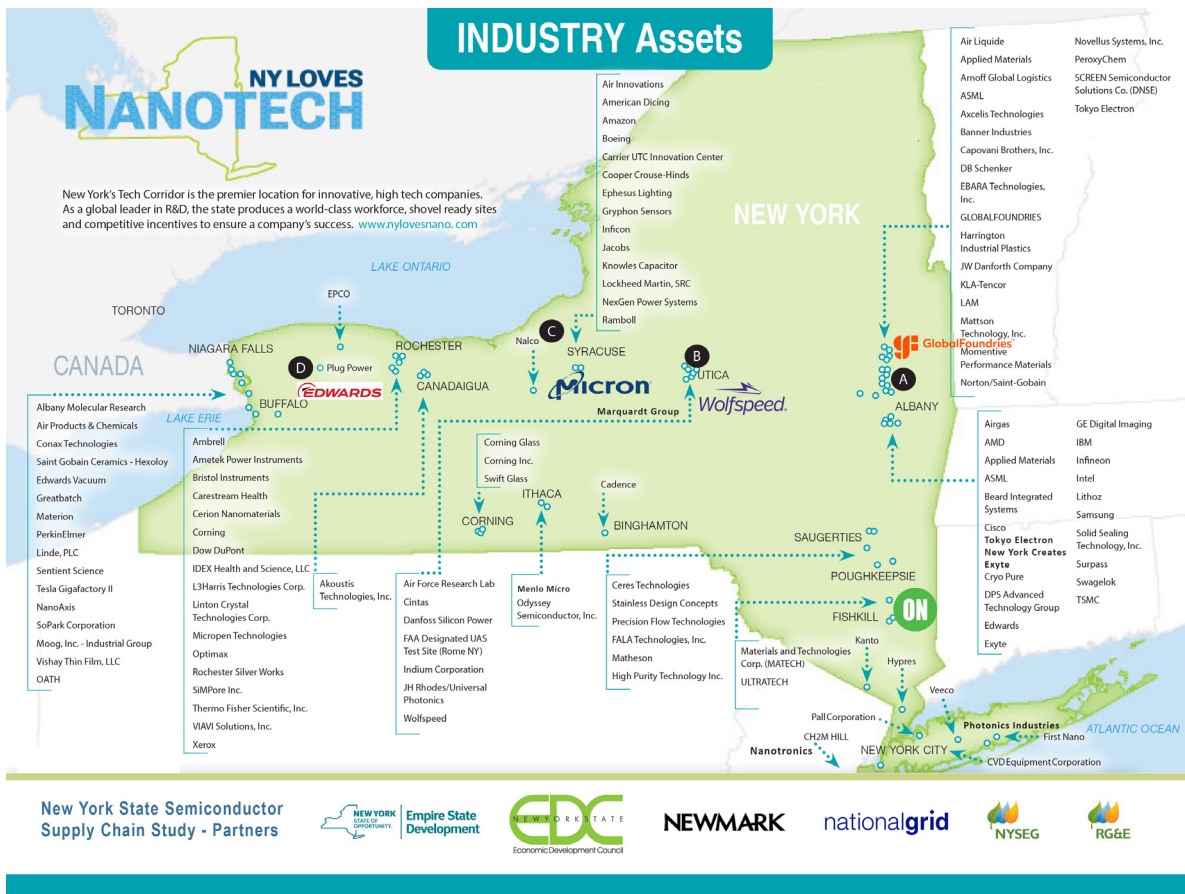
- ✓ Hope & acknowledgment of aptitude in rebuilding the national economy & improving national security...
- ✓ Rebuild institutional knowledge for growth with new technical assistance from several government agencies with Small Business Administration for Small Business Investment Company (SBIC) and Small Business Innovation Research (SBIR), Housing & Urban Development (HUD) Planning assistance for long-term planning & housing needs; USDA alignment for electric and broadband infrastructure; US DOT strategic guidance for relevant programs
- ✓ Global recognition across the private sector industry partners (“industry cluster development” Industry leaders are encouraged by federal partners to expand their business here!)
- ✓ Supply-Chain business growth (contract manufacturers across the Region, from electronic components to sheet metal, to packaging (see NY BEST and AM&T Supply Chain development)
- ✓ Research & Development expansion & increased opportunity for investment at universities
- ✓ Alignment of federal funding & increased competitiveness in federal grant opportunities, with new site development, re-development of our vacant industrial areas, additional support for entrepreneur centers (Koffman, Rev, Otsego Innovation; Example: 11/9/23 EDA investment of Build to Scale, “1 of 60” Cornell & REV awarded \$2million for Med Tech Accelerator!).

EMERGING OPPORTUNITY

MICRON PLANT DEVELOPMENT

NAICS CODE: 334413

Definition: “This U.S. industry comprises establishments primarily engaged in manufacturing semiconductors and related solid-state devices. Examples of products made by these establishments are integrated circuits, memory chips, microprocessors, diodes, transistors, solar cells, and other optoelectronic devices” (NAICS).



In October 2022, Micron Technology announced it would be building the country’s largest semiconductor manufacturing plant. With an expected investment of up to \$100 billion through 2043, the development in Onondaga County, just north of Cortland County, along the I-81 corridor is anticipated to have a positive regional impact since Micron Technology is rated as a top company within this industry. The State is currently conducting a supply chain study, and Cortland and Tompkins County leaders have been serving on the committee guiding \$500 million in workforce training and community program investment. While the plan will become better defined over the next 5 years, the Regional Board anticipates a positive local impact across the region.

UPDATE: In 2024, semiconductor supply-chain manufacturer Menlo Micro announced a **\$50 million** investment in Tompkins County.

RESILIENCY PLAN

ECONOMIC RESILIENCE INITIATIVES INCLUDE:

CAPACITY BUILDING & PLANNING

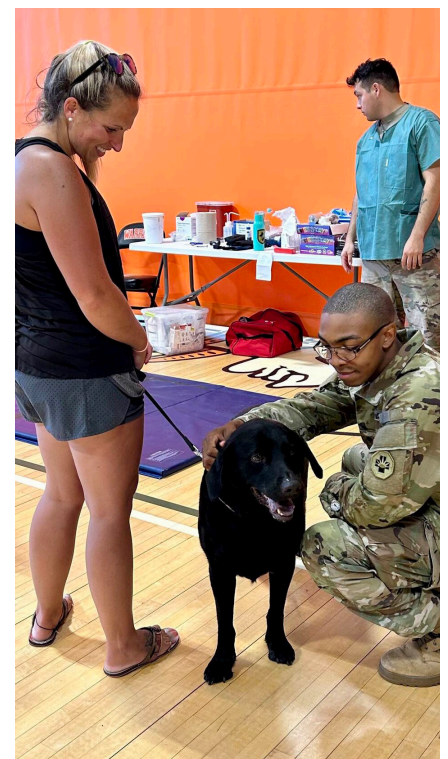
- The continuation of comprehensive planning and building institutional capacity to address infrastructure deficiencies such as broadband & energy infrastructure across the 8-County region, as supported in Goal Area 3.
- The expansion of our economic databases and geospatial services to assist discussions and decision-making with infrastructure, growth potential, community re-development and workforce demographics and encourage engagement and investment.

ECOSYSTEM DEVELOPMENT

Continued support for Industry Cluster ecosystem development and building equity with wealth-creating opportunities, as supported in Goal Area 1.

INFRASTRUCTURE DEVELOPMENT

Continued support for capital and site improvements, and community infrastructure such as broadband, energy, water and wastewater.





DIVERSIFYING OUR ECONOMIC BASE

Continued support for several industry clusters in Manufacturing, Agriculture, Education, Healthcare, Telecommunications Industries, and Supply Chain Businesses.

PROMOTING OUR ASSETS

The regional portal “So-Tier.com” has been developed to promote our natural and cultural assets, organizational resources, and business development opportunities across the Southern Tier region.

TRAINING FOR DISASTERS

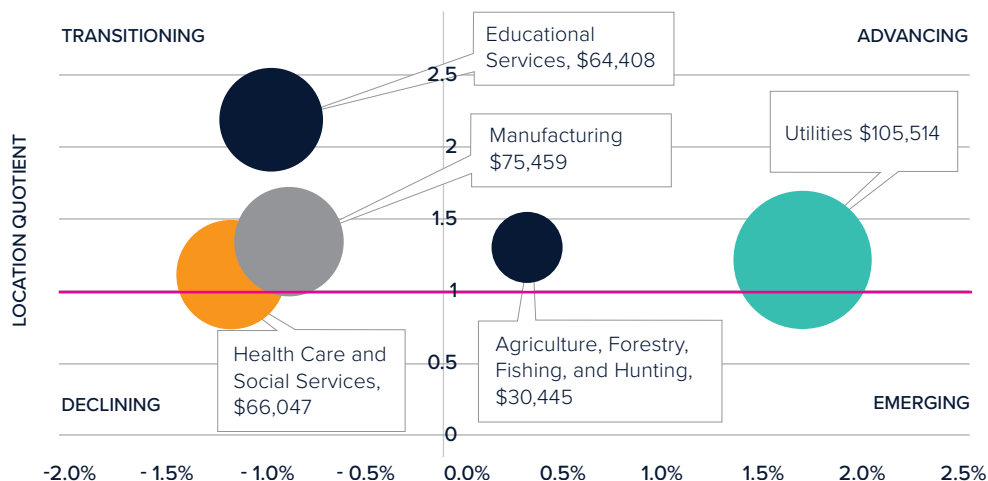
In 2006, 2011, and 2012, several communities experienced massive flooding events across the region. The Regional Board has staff that is pursuing a Floodplain Management Certification and supporting community mitigation efforts.

In addition, the EDD has been “matched” for several Department of Defense Innovative Readiness Training (IRT) programs that have offered training programs for the military and provided health care and engineering assistance to residents in Cortland, Chenango, and Delaware Counties. The EDD will continue to support the local IRT program.

INDUSTRY SECTORS ACROSS THE SOUTHERN TIER

REGIONAL SECTOR ANALYSIS 2023Q1

ANNUAL EMPLOYMENT RATE OF CHANGE FROM 5-YEAR HISTORY



LOCATION QUOTIENT Definition: An analytical statistic that measures a region's industrial specialization relative to a larger geographic unit (usually the nation). An LQ is computed as an industry's share of a regional total for some economic statistic (earnings, GDP by metropolitan area, employment, etc.) divided by the industry's share of the national total for the same statistic. For example, an LQ of 1.0 in mining means that the region and the nation are equally specialized in mining; while an LQ of 1.8 means that the region has a higher concentration in mining than the nation" (BEA)

TRANSITIONING Definition: An industry that is in the state of its life cycle where growth slows to the growth rate of the economy at large.

DECLINING Definition: An industry that is not keeping pace with the rest of the economy's growth.

EMERGING Definition: An industry centered around new technology and is building its supply chain to become an advancing industry.

ADVANCING Definition: An industry that's considered growing in the economy and economically stable.

NAICS Definition: The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS code comprises six levels, from the all industry level to the 6-digit level. The first two digits define the top level category, known as the "sector."

TARGET SECTOR FOR TECH HUB GROWTH

MANUFACTURING SECTOR

Industry Location Quotient (LQ) of **1.34** & Average Wage of **\$75,459**
NAICS Sector: **31-33**

Definition: The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing (BLS).

ADDITIONAL SECTORS STRENGTHENING & DIVERSIFYING TECH HUB GROWTH

AGRICULTURE, FORESTRY, FISHING, AND HUNTING SECTOR

Industry Location Quotient (LQ) of **1.3** & Average Wage of **\$30,445**
NAICS Sector: 11

Definition: The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries. A farm may consist of a single tract of land or a number of separate tracts which may be held under different tenures (NAICS)

The Agriculture, Forestry, Fishing, and Hunting sector is essential to the target sector, Manufacturing, because industrial diversity is critical to economic stability. Without a variety of thriving industries with wealth-creating jobs, industrial dependency can cause extreme and excessive poverty when there is an economic shock. Diverse economies are well understood to be essential for economic sustainability and the long-term success of a region.

The Agricultural sector has seen a transformation from smaller family farms to larger agricultural businesses through value-adding services. The Food and Beverage sector is creating and growing local wineries, micro-breweries, and other food-related activities. Demand for locally sourced food products has been a recent trend and our proximity to major urban areas offers local food and beverage producers opportunities, if properly developed.

Value Adding Services Definition: Non-core services or goods used to promote primary goods or services and to bring in additional revenue.

SECTOR SUPPORT LEADERS:

1. The Center for Agriculture Development & Entrepreneurship (CADE) recently developed a Vision 2050 plan with Cornell University, SUNY-Cobleskill, Hartwick College and a faculty from Columbia University to set an agenda for expanding growth in the New York State Foodshed. <https://cadefarms.org/vision-2050/>
2. The Groundswell Center for Local Food & Farming is home to an Incubator Farm that provides new farmers with land, farm facilities, technical training, and one-on-one guidance.
3. Cornell Cooperative Extension offices support local agricultural programs with data and best practices, educational programs & networking, workforce development and business expansion across each County.
4. Schoharie Enterprise Economic Corp (SEEC) recently published a Business Plan, defining strategies to expand Regional Independent Food Processing (a need across the region).
Link: <https://seecny.org/wp-content/uploads/2023/03/RIFP-Final-Packaged-Plan-With-Updated-Cover-1.pdf>
5. Supported by New York State, Grow-NY is a business competition focused on growing an enduring food and agriculture innovation cluster in the Grow-NY region.

With these opportunities in mind, the market potential for an increase in innovative agricultural products is extensive. With a focus on innovative agriculture, we can increase the average wage to produce wealth for both generational and new farmers alike.

EDUCATIONAL SERVICES SECTOR

Industry LQ of **2.18** & Average Wage of **\$64,408**
NAICS Sector: **61**

Definition: This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. This also includes Research and Development within an education institution. (NAICS)

Educational Services is an industry that can be easily overlooked when considering critical industries, but initiatives like New Energy New York are formed from a strong basis of educational services. To allow for the Tech Hub to grow and strengthen the economy, we must protect our existing strength of educational services and ensure that the services provided are also meeting industry needs while remaining accessible to all. This State University of New York (SUNY) system is one of the strongest in the nation, but there is little retention for those who choose to attend school here. Prime age retention must be prioritized or there will be no workforce to fill the jobs created by the tech hub. **Prime Age definition: those ages 25 to 54 years of age**

HEALTH CARE AND SOCIAL SERVICES SECTOR

Industry LQ of **1.11** & Average Wage of **\$66,047**
NAICS Sector: **62**

Definition: The industries in the sector are arranged on a continuum starting with establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. Establishments in this sector deliver services by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise. (NAICS)

Further in the demographics section, there is mention of mental and physical health concerns within the region. If we want to encourage more population growth, health care and social services must also grow to meet the demand of the incoming Tech Hub workforce. While it's not exceptionally strong currently, it's a vital industry for the success of the Tech Hub.

UTILITIES SECTOR

Industry LQ of **2.18** & Average Wage of **\$64,408**
NAICS Sector: **61**

Definition: The utilities sector consists of establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities. The Utilities NAICS Sector excludes Broadband (NAICS Code: 517311); however, there is an expected overlap between Information (NAICS Sector 51) and Utilities (NAICS Sector 22).

Accessible and consistent utilities are critical to other sector development. This industry must grow with the same strength as the tech hub because business can not grow without basic utilities.

NAICS INDUSTRY TABLE 2023

NAICS	BROOME	CHENANGO	CORTLAND	DELAWARE	OTSEGO	SCHOHARIE	TIOGA	TOMPKINS	REGION
11 - Agriculture, Forestry, Fishing and Hunting	19	30	31	34	23	34	20	51	242
21 - Mining, Quarrying, and Oil and Gas Extraction	11	0	4	7	2	5	5	4	38
22 - Utilities	13	2	3	4	5	4	3	6	40
23 - Construction	388	84	86	107	102	79	84	183	1,113
31-33 - Manufacturing	155	56	57	45	55	22	46	91	527
42 - Wholesale Trade	186	37	29	30	34	23	26	65	430
44-45 - Retail Trade	619	157	156	173	243	96	122	315	1,881
48-49 - Transportation and Warehousing	123	45	30	55	50	34	31	43	411
51 - Information	65	22	14	44	26	9	17	75	272
52 - Finance and Insurance	187	40	46	38	53	30	34	96	524
53 - Real Estate and Rental and Leasing	152	28	32	26	43	13	14	112	420
54 - Professional, Scientific, and Technical Services	321	59	64	61	100	43	54	339	1,041
55 - Management of Companies and Enterprises	47	7	5	4	9	2	11	11	96
56 - Administrative and Support and Waste Management and Remediation Services	236	30	53	47	66	26	39	121	618
61 - Educational Services	92	44	24	42	44	17	28	90	381
62 - Health Care and Social Assistance	446	112	116	120	168	69	83	319	1,433
71 - Arts, Entertainment, and Recreation	75	17	26	28	34	9	18	53	260
72 - Accommodation and Food Services	451	88	116	120	189	66	79	289	1,398
81 - Other Services (except Public Administration)	446	86	109	109	140	50	83	256	1,279
92 - Public Administration	95	64	44	65	68	44	37	50	467
99 - Unclassified	205	54	50	102	87	41	47	162	748
	4,332	1,062	1,095	1,261	1,541	716	881	2,731	13,619

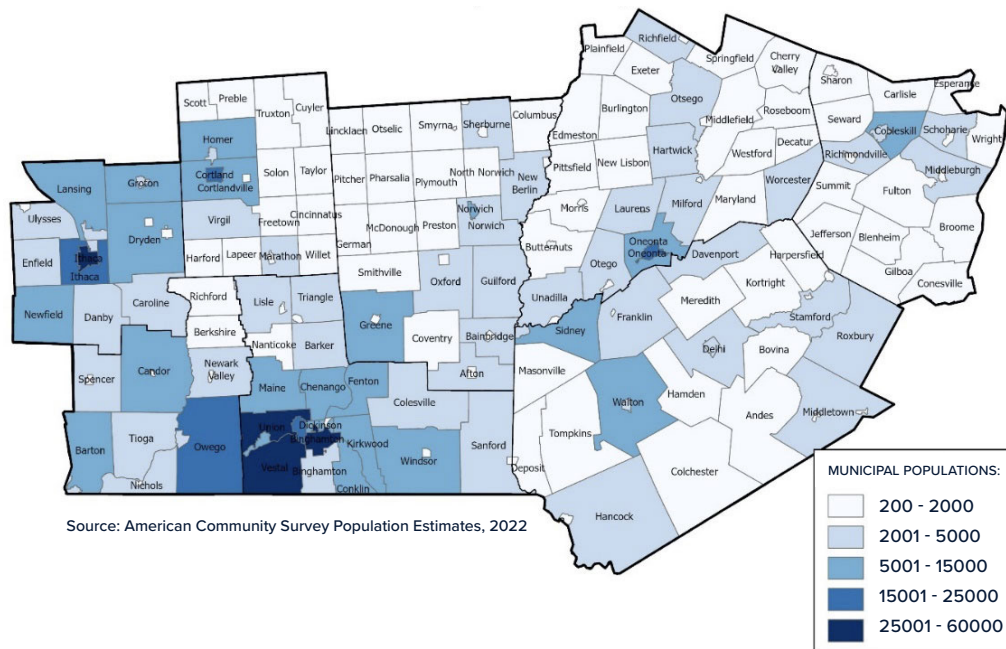
THE RATIONALE

RATIONALE FOR PUBLIC INVESTMENT

POPULATION

The Southern Tier covers diverse population densities across 6159 square miles with a population of 577,689 (2022), and **52.2%** of the population in Broome and Tompkins counties. The region is bounded by the Catskill Mountains, the Finger Lakes region and northern Pennsylvania. Border regions, such as the Southern Tier, are often more sensitive to competition from bordering states and non-competitive regulations.

2022 MUNICIPAL POPULATIONS



From 2017 to 2021, it is estimated that the region gained 1,266 people. However, from 2021 to 2022, the region lost 1,494 people (ACS, 2022). The concentration of this population loss within a single year illustrates one of the many impacts of the global COVID-19 pandemic on the region. This five-year time frame shows some moderate growth within the region before the pandemic.

Between 2017 to 2022, the Metropolitan Binghamton Statistical Area, which is Broome and Tioga counties, grew by 2,672 people. Over the last four decades, Tompkins County has also experienced steady growth. From 2020-2022, the City of Oneonta in Otsego County experienced significant population growth of 18.7% (2,439 people). The remaining counties have witnessed a long-term population decline. From 2020 to 2022, these counties lost 2% to 8% of their population. Cornell University's Applied Demographics continues to forecast a reduced population. On the other hand, the region has many assets that provide opportunities to increase community wealth.

WORKFORCE DEMOGRAPHICS

In 2021, the average per capita income for the region was \$32,485, while the US was at \$37,638. From 2016 to 2021: US PCI in 2021 dollars increased by \$3,782 & the region's PCI in 2021 dollars increased by \$3,203. Although these increases are similar, there is still a gap of over \$5,000 between the U.S. PCI and the regional PCI. This difference in income is influential various development issues that the region faces, and bridging this gap is essential to economic success.

Table 1: SUMMARY REGION DEMOGRAPHIC CHANGES FROM 2016 - 2021 (ACS 2016 & 2021)

	POPULATION	UNEMPLOYMENT RATE	AVERAGE PER CAPITA INCOME (2021 \$)
Region in 2016	579,183	579,183	\$29,281.87
Region in 2021	579,375	579,375	\$32,435.13

In 2021, the regional poverty rate was estimated to be 15.3% while the U.S. poverty rate was 12.6%. However, regionally, only 12.9% were receiving Food Stamps/SNAP benefits; while nationally, 11.4% were receiving Food Stamps/SNAP benefits. This allocation of benefits was not proportional to the poverty rate **resulting in double the people experiencing poverty going without assistance.**

While 24-month unemployment is at a historic low of 3.3%, it's important not to acknowledge that as the only indicator of workforce success; ideal unemployment rates would be between 4-5%. The regional workforce participation rate is 58.1% compared to the US (63.4%) and NYS (63%). Several variables can attest to this low number.

Table 2: SUMMARY WORKFORCE DEMOGRAPHIC (ACS, 2021)

	UNEMPLOYMENT RATE	WORKFORCE PARTICIPATION RATE	PRIME AGE RATE
USA	3.8%	63.4%	39.1%
State	4.1%	63.0%	40.1%
Region	3.3%	58.1%	33.3%

Across the Southern Tier, there are 234,078 individuals in the workforce. The top sectors for employment making up 44.1% of jobs are Educational Services (NAICS 61, 40,542 workers, 17.3%), Health Care and Social Assistance (NAICS 62, 37,228 workers, 15.9%), and Retail Trade (25,453 workers, 10.9%). The top sectors for average wages are Utilities (\$105,514), Finance and Insurance (\$82,862), and Management of Companies and Enterprises (\$77,552).

The Southern Tier region is home to 10 colleges and universities that draw over 70,000 students to the region every year.

The region’s access to quality educational assets is an area of strength and cannot be understated; the need for collaboration between the colleges, universities, BOCES, and workforce investment partners is paramount. Currently, regionally, 13% of those ages 25-64 have an associate degree compared to the national rate of 9.3%; however, only 17.3% in the region have a bachelor’s degree compared to the U.S. rate of 22%, and state rate of 23.4%, while having a high upper-secondary education rate of 29.2% compared to the national (25.3%) and state (23.6%) average. These statistics point to a need for transitions from 2-year programs to continued education for a bachelor’s degree. Our ability to channel that resource for practical gains in workforce development is a critical component of the economic success of the region.

Table 2: EDUCATION SUMMARY FOR AGES 25-64 (ACS, 2021)

	ASSOCIATE’S DEGREE	BACHELOR’S DEGREE	GRADUATE DEGREE
USA	9.3%	22.0%	25.3%
NYS	8.4%	23.4%	23.6%
Region	13.0%	17.3%	29.2%

Workforce development not only includes high school graduates but also more mature workers attempting to leverage training due to job loss, career change or geographic move. With the shift in energy economies and a manufacturing community across the Southern Tier, the region can support the State’s energy goals and expand the manufacturing supply chain. However, to succeed, a new workforce must be trained to meet the projected employment needs. Over 6000 “Clean Energy” Industry Jobs are projected to support the infrastructure changes, with another 4000 in manufacturing and start-ups (Southern Tier Clean Energy Industry Cluster Study, Tier Energy Network, 2020).

WORKFORCE BARRIERS

Local businesses can stagnate due to a lack of employable job candidates or by hiring those with less than ideal productivity. Over the last few years, the Regional Board has invested in several workforce programs with partners across the region, to address barriers with transportation, SUD recovery, and incarceration transition through vocational training, certificate programs, internship programs, apprenticeship programs, and English as a Second Language (ESL) training.

LANGUAGE DIVERSITY

The region’s diversity varies between the different counties and communities. The two counties with the largest population, Broome and Tompkins, have a combined 6.8% of their population who have limited English proficiency with Chinese (22.1%) and Spanish (21.2%) being their first language. Despite the need for this transitional skill development, there are limited resources for foreign-born individuals within the eight-county region to acquire English proficiency. Our geographic neighbors in New York City are the heart of diversity for the nation and feeling extensive pressure from refugee migration into their area, while the regional foreign-born population falls at just 4.7% with county rates ranging from 1.9% to 12.3% with the U.S. rate being 13.6%. In addition to learned skills, it’s important to note that some residents have additional barriers to employment and must be accommodated.

DISABILITY WORKFORCE INFLUENCE

Table 2: DISABILITY RATE & WORKFORCE (ACS, 2021)

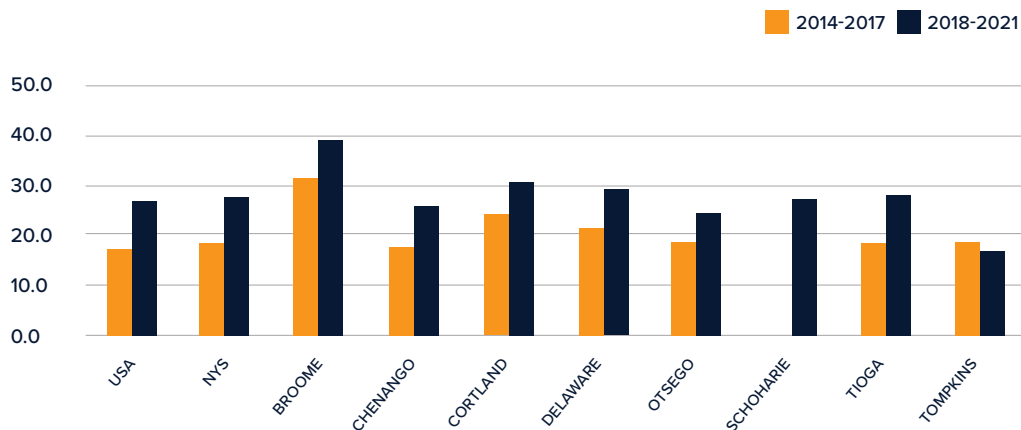
	PRIME AGE PARTICIPATION RATE	DISABILITY RATE FOR INDIVIDUALS AGES 18-64	PRIME AGE INDIVIDUALS WITH A DISABILITY & IN THE WORKFORCE
USA	82.5%	10.3%	39.1%
NYS	83.0%	8.9%	40.1%
Region	81.7%	12.1%	33.3%

The Southern Tier has a higher disability rate of 12.1% for those ages 18-64 compared to both the rate in New York State (8.9%) and the nation (10.3%). Based on the Regional Board's 2022 Business Assessment, there are less supportive resources in the Southern Tier than other areas of the state (OWLS, 2022). In addition to this high rate, those who have a disability and are within this age range have a lower labor force participation rate than the national average (44.2%) and are on par with the state average (40.7%) at 40.8%. Financial assistance from a disability claim limits a household's income opportunity, the amount and type of work they're eligible to do, and potential private investment in their housing and community.

MENTAL AND PHYSICAL WELLNESS

Mental health issues vary across the region, particularly substance use disorder (SUD), a mental health condition causing abuse of various substances that can cause harm (Health in Appalachia). Substance Use Disorder is not only opioid misuse but also alcohol misuse; it is any substance that intoxicates the user or secondary receiver.

NUMBER OF OPIOID OVERDOSE DEATHS PER 100,000 POPULATION AGES 15-64



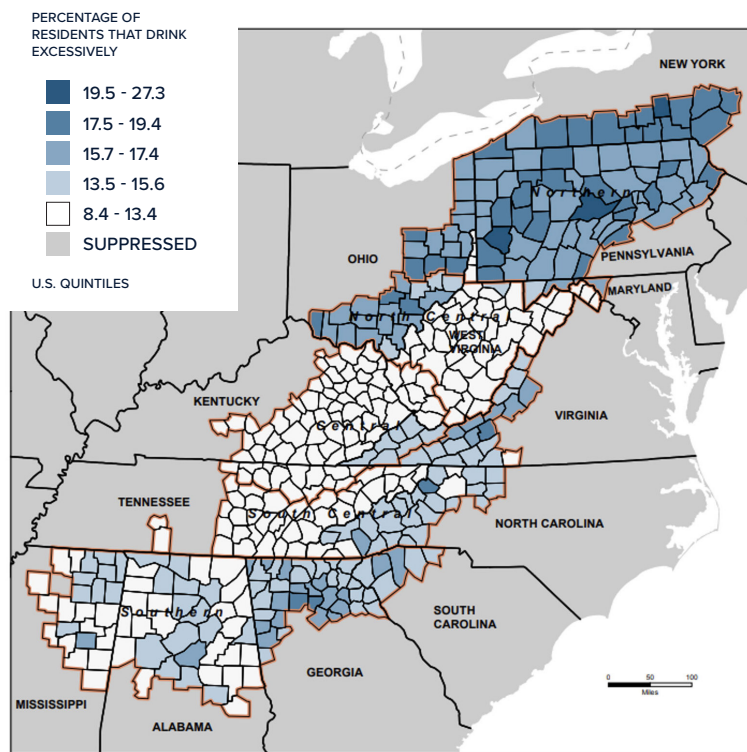
Source: Recovery Ecosystem Index Map (norc.org)
https://rsconnect.norc.org/recovery_ecosystem_index/

While Chenango, Schoharie and Tioga Counties have experienced less deadly opioid deaths than the national average, the number of deaths across the region have increased over the last 5 years. Excluding Tompkins County, where deaths have decreased and are well below the national average.

It is important to note that those on Medicare, typically within the lowest income bracket for the community, rarely receive opioids. The opioid prescription claims for Medicare beneficiaries within the region ranging from 3% to 4.6% compared to the rest of Appalachia at 6% and US rates of 5.3% (Health in Appalachia, 2013). This number does not include those with other types of insurance. It is important to note this low rate because it can be easy to see substance misuse as a personal issue rather than a community issue, and it is affecting community members region wide.

The region has some of the worst alcoholism rates in Appalachia ranging from 17.6% to 20.3% of all residents with the rest of Appalachia falling at 15.2% (Health in Appalachia, 2014). Map 1 helps compare the region to the rest of Appalachia; showing excessive drinking is more prevalent in our region. Many employers do not have the training necessary to help an employee or job candidate transition from recovery into the workforce, even if they are the best candidate for the job. Of the individuals that we surveyed in our 2023 community survey, 11% of respondents specified that better healthcare and SUD treatment was a vision that they had for their community (CEDS Community Survey, 2023)

MAP 1: PERCENTAGE OF RESIDENTS THAT REPORT EXCESSIVE DRINKING IN THE APPALACHIAN REGION, 2014



Data Source: County Health Rankings & Roadmaps, 2016. University of Wisconsin Population Health Institute supported by Robert Wood Johnson Foundation <http://www.countyhealthrankings.org/rankings/data>

EXCESSIVE DRINKING DEFINITION: “Excessive drinking is defined as the percentage of the population who report at least one binge drinking episode involving five or more drinks for men and four or more for women over the past 30 days, or heavy drinking involving more than two drinks per day for men and more than one per day for women, over the same time period. Alcohol use is a behavioral health issue that is also a risk factor for a number of negative health outcomes, including: physical injuries related to motor vehicle accidents, stroke, chronic diseases such as heart disease and cancer, and mental health conditions such as depression and suicide. There are a number of evidence-based interventions that may reduce excessive/ binge drinking; examples include raising taxes on alcoholic beverages, restricting access to alcohol by limiting days and hours of retail sales, and screening and counseling for alcohol abuse” (Centers for Disease Control and Prevention, Alcohol Use, 2016).

Across various health metrics, the region underperforms showing multiple examples of unhealthy coping behaviors (Table 2). Some counties are worse in certain categories than others, but in general, the region struggles with mental & physical well-being.

Table 2: SUMMARY OF HEALTH CONCERNS (HEALTH IN APPALACHIA, 2016)

	AVG # OF PHYSICALLY UNHEALTHY DAYS	AVG # OF MENTALLY UNHEALTHY DAYS	% ADULTS REPORTING CURRENTLY SMOKING	% ADULTS WITH OBESITY	% PHYSICALLY INACTIVE	% EXCESSIVE DRINKING	% DRIVING DEATHS WITH ALCOHOL INVOLVEMENT
USA	3.8	4.2	11.5	41.9	25.3	17	30
NYS	2.7	4.1	12	27	25	18	20
Region	3.1	4.8	18	31	22	21	22

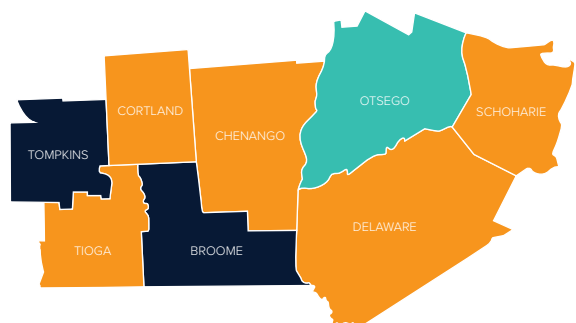
Additionally, it should be noted the limited accessibility to various healthcare within the region. Due to the complex make-up of the population density. In Table 3, it shows the limited access to various healthcare providers per capita. This limited number of doctors can result in various limitations including long wait time, higher costs, and resulting in worse health outcomes (Health in Appalachia, 2016; OWLS, 2022).

Table 3: STATISTICS OF HEALTHCARE ACCESS (HEALTH IN APPALACHIA, 2016)

	PRIMARY CARE PHYSICIANS RATIO	DENTIST RATIO	MENTAL HEALTH PROVIDER RATIO
State	1174:1	1218:1	299:1
Region	2366:1	3047:1	480:1
Broome	1162:1	1450:1	416:1
Chenango	3115:1	2909:1	506:1
Cortland	2621:1	2894:1	248:1
Delaware	3138:1	4438:1	740:1
Otsego	783:1	2004:1	461:1
Schoharie	3459:1	2986:1	609:1
Tioga	3422:1	5998:1	615:1
Tompkins	1232:1	1696:1	245:1

PHYSICIANS RATIO

■ Better Access To Care
 ■ In-line with State Average
 ■ Limited Access



REGIONAL HOUSING PERSPECTIVE

IMPACT OF INCOME ON HOUSING

Housing challenges in the region vary by income level and occupancy type, affecting both lower-income residents struggling with affordability and higher-income workers seeking modern, high-quality housing. A key factor in these challenges is the regional price-to-income ratio, which measures housing costs relative to earnings. While more analysis is needed across the region, data from the Binghamton and Ithaca metro areas show a clear upward trend from 2000 to 2022 where the Binghamton metro’s ratio increased from 1.9 to 2.6, while Ithaca’s rose from 2.6 to 4. This indicates that housing prices are outpacing income growth, impacting affordability at all levels. However, this metric does not account for additional expenses such as taxes and utilities, which vary widely by state. In New York, high state income taxes, property taxes, and energy costs further erode disposable income, making the actual burden of housing costs even greater than the price-to-income ratio alone suggests.

Cost-burdened households, those spending more than 30% of their income on housing, are particularly common among renters and lower-income earners, highlighting the demand for rental housing even as costs remain steep relative to wages. For instance, with median monthly rent at \$851, a household would need a net monthly income of \$2,838 to avoid being cost-burdened equivalent to an annual net income of \$34,040 or a gross income of approximately \$45,080 for a single worker (ACS, 2021). Tables 4, 5 and 6 illuminates affordability across the varying occupancy types within our region.

Table 4: SHOWING PERCENTAGE OF RENTERS & HOUSE OWNERS PAYING MORE THAN 30% FOR HOUSING

COST-BURDEN (MONTHLY >30%)	USA	REGION
Owners with mortgage	27.8%	24.4%
Owners w/o mortgage	13.5%	13.5%
Renters	49.6%	50.7%

Table 5: RENTERS NECESSARY INCOME FOR MEDIAN HOUSING COSTS (ACS, 2021 & 2022)

	Average HH of Rental Occupied	PCHH of Rentals by MHI	Median Rent	Min. Monthly HH Income to Afford Median Rent	Min. Net Income to Afford Median Rent	Min. Gross Income to Afford Median Rent (A)	PCHH of Median Rent by MH (B)	B-A	PCI	Tax Rate for Gross Income Needed to Afford Median Rent
Regional	2.07	\$29,409	\$851	\$2,838	\$34,055	\$45,080	\$29,409	-\$15,671		24.46%
US	2.42	\$28,802	\$1,163	\$3,877	\$46,520	\$64,480	\$28,802	-\$35,678		27.85%
NY	2.41	\$30,788	\$1,390	\$4,633	\$55,600	\$78,590	\$30,788	-\$47,802		29.25%

Table 6: MORTGAGE HOLDERS NECESSARY INCOME FOR MEDIAN HOUSING COSTS (ACS, 2021 & 2022)

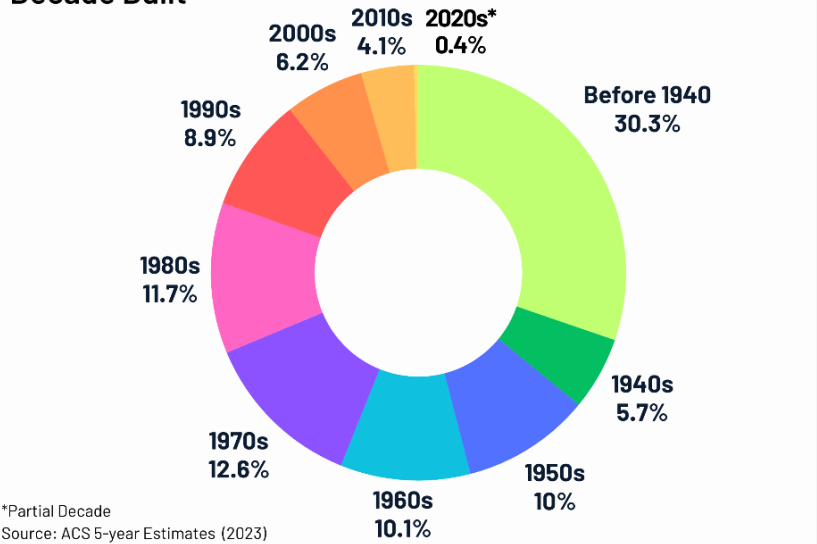
	Average HH of Rental Occupied	PCHH of Rentals by MHI	Median Mortgage	Min. Monthly HH Income to Afford Median Mortgage	Min. Net Income to Afford Median Mortgage	Min. Gross Income to Afford Median Mortgage (A)	MHI (2022) (B)	B-A	PCI	Tax Rate for Gross Income Needed to Afford Median Mortgage
Regional	2.43	\$25,098	\$1,362	\$4,540	\$54,480	\$76,850	\$60,988	-\$15,863		29.11%
US	2.69	\$25,911	\$1,697	\$5,657	\$67,880	\$97,990	\$69,700	-\$28,290		30.73%
NY	2.75	\$26,982	\$2,267	\$7,557	\$90,680	\$134,755	\$74,200	-\$60,555		30.73%

HOUSING STOCK

The region also faces a housing mismatch for middle- and higher-income earners. Despite a surge in emerging industry investments, much of the available housing stock is outdated and lacks the quality and amenities today’s workforce expects. Over 56% of the region’s housing stock is more than 50 years old, and only 10.6% has been built since 2000. Limited new construction has widened the gap between demand and availability, making it difficult for professionals and families to find suitable homes.

Additionally, the cost of building new housing far exceeds local market sales prices (median construction price for single-family homes in the Northeast reached \$485K in 2023), discouraging developer interest and investor confidence. While the region’s housing costs may seem relatively affordable, with median sales prices ranging from \$170,000 to \$319,000 across the eight counties, these figures align more closely with West Virginia’s housing market (\$229,000) than with state (\$435,000) or national (\$427,000) averages. This stagnant housing market, combined with shifting household compositions and wages that have not kept pace with rising housing costs, is contributing to a growing housing crunch that limits options for workers at all income levels. Without intervention, the housing gap will continue to hinder economic growth, making it more difficult to attract and retain a skilled workforce, with even higher earners facing trade-offs in meeting their housing needs.

2023 Southern Tier Region Housing Units Decade Built



RISING COMPLEXITIES

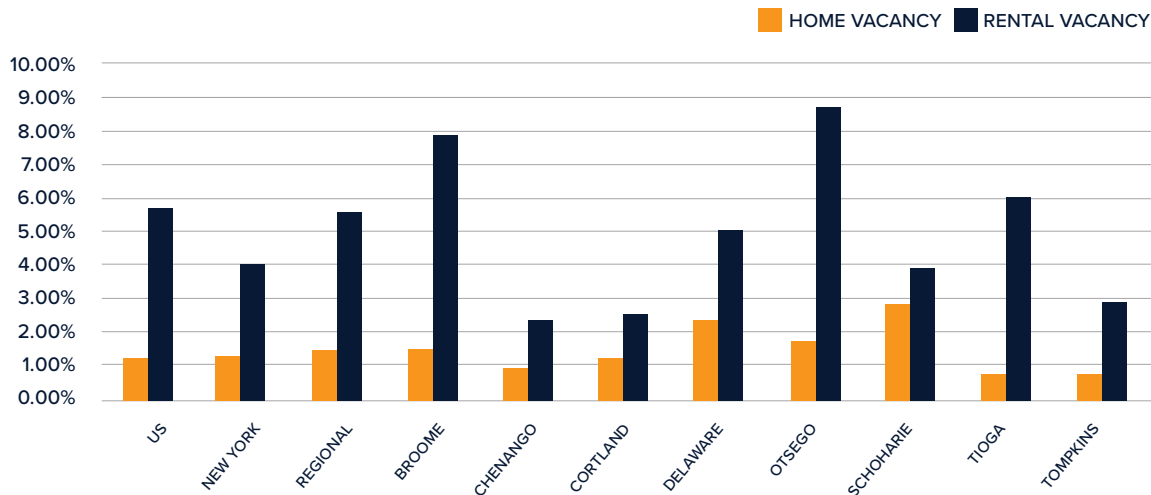
Several localized influences must be taken into account that affect counties to varying degrees, such as the presence of student housing in counties with universities and the impact of short-term rentals in tourism-driven areas. While tourism and a strong education sector can offer significant benefits, private developers and homeowners may find it more profitable to invest in short-term rental properties or seasonal student housing. This can lead to conversion of homes away from permanent residential use to more transient uses and misleading rental vacancy rates, leaving local residents without available housing options. While further research is needed on these trends across multiple counties, the current data and feedback from our CEDS committee suggest that this is the conclusion many communities are reaching.

UNHOUSED INDIVIDUALS

Although it is challenging to pinpoint exact numbers of unhoused individuals due to the fluidity of housing circumstances and the relatively small population, there is clear evidence of need. According to the 2022 “point-in-time” survey by the Southern Tier Homeless Coalition, 0.24% of the population in Broome County accessed an emergency shelter, compared to the national rate of 0.18%. This indicates a local need for homelessness services. These figures likely underestimate the full scope of housing instability, as many individuals and families face temporary homelessness without utilizing emergency shelters or may be living in precarious housing situations, especially of note considering the age and condition of housing stock. Broader regional trends, including rising rental costs, limited affordable housing options, and increasing rates of housing cost burdens, exacerbate the issue. While the homelessness issue may appear to be localized to certain municipalities or counties, these trends may in part be influenced by the relative access to services impacting where and how these individuals are counted, and therefore this issue should be looked at in a more regional lens.

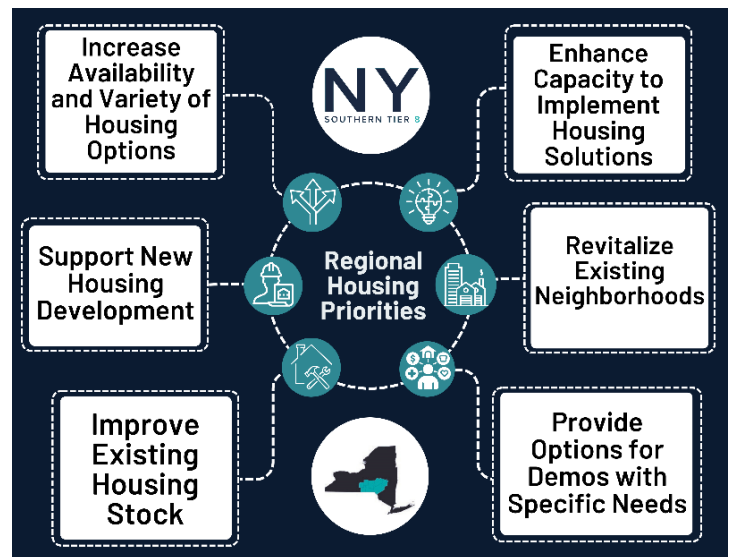
Addressing homelessness requires a dual approach both immediate support for unhoused individuals and long-term strategies for economic stability. One critical aspect is increasing the availability of wealth-building job opportunities with skillsets aligned to the region’s existing labor market. By creating more pathways for economic mobility, the region can help mitigate extreme conditions, such as homelessness and dependency on assistance.

HOUSING VACANCY RATES IN 2022



REGIONAL BOARD ROLE

Despite challenges, there is strong interest and momentum to address the issue through regional collaboration, resource sharing, and the implementation of proven housing and finance strategies. In 2024, with the 8 County Planning Departments, Southern Tier 8 assessed local housing needs, identified common challenges, and **defined 6 shared housing priorities**: Increase Availability and Variety of Housing Options, Support New Housing Development, Improve Existing Housing Stock, Enhance Capacity to Implement Housing Solutions, Revitalize Existing Neighborhoods, and Provide Options for Demographics with Specific Needs. In 2025, a strategy will be developed to identify & expand local efficiencies, that can be scaled across the region to encourage expedited investment.



INFRASTRUCTURE CHALLENGES

TRANSPORTATION INFRASTRUCTURE

While the Region is within a 3-hour drive to New York City and larger East coast markets, the Southern Tier Expressway or Route 17 lacks necessary improvements for a complete Interstate Highway designation. This not only impacts the Region's presence on various highway maps, but also the ability to encourage economic development growth. The Region does not have access to the State's Thruway system, where the larger Upstate Cities are connected via I-90 and I-87.

This lack of interconnection is a major disadvantage for our region. Despite the lack of interstate designation for I-86, the roadways are utilized as an interstate. This lack of designation puts the cost of maintenance on the communities, which are predominantly rural and have a smaller tax base. This lack of infrastructure policy will continue to be a burden on the local economies until resolved. This change is essential to economic progress in the Southern Tier, especially for rural communities.

UPDATE: On November 15, 2024, NYS DOT designated **32 miles** of New York State Route 17 to Interstate 86. To complete the Interstate construction ,there are construction projects identified, but still un-funded in Delaware and Sullivan counties.



INTERNET ACCESS & BROADBAND INFRASTRUCTURE

Over the last two decades, broadband infrastructure development has been a priority for the Regional Board. Development challenges include:

1. Rural Dis-Investment and the Internet Service Provider (ISP) Return on Investment (ROI): While the 1996 Telecommunications Act was designed to spur competition, this practice may have worked well in populated growth areas, but for those faced with industry and population decline, the challenge was exacerbated, and can be quantified in the monthly internet bill, with a (2022) National Avg Income of \$60K, the monthly triple-play service is \$145. In the Southern Tier, with an income of \$49K, most have just one internet choice, at the monthly cost of \$180.

2. Geography: While beautiful vistas are enjoyed across the region, the corresponding hilly landscapes often block the transmission of data. (Fixed Wireless technology has proven to deliver adequate internet service, with adequate "line of sight").

3. Reduced Opportunity to Scale: ISP maintenance costs can be lowered for the individual consumer when divided by many consumers in a high-density environment. However, when the ISP is serving 1 or 2 homes per mile, the ISP does not generate as many consumers or income to maintain.

4. Local Capacity: Infrastructure development can be complex, involve many stakeholders and technology terms tend to intimidate those trying to understand granular (or community) level challenges. Rural communities do not often have the capacity to develop plans and implement solutions.

5. Evolving Use: While wireless and satellite solutions were considered adequate to reach the most rural communities five years ago, the global pandemic tested the network limitations, revealed the rural inequity to access (across employment, healthcare and education) and reignited the argument for fiber networks to meet the industry standard today and for the next 30 years. As each household and business adds more technology and devices, the need for service (or bandwidth) increases. While the industry standard evolves, the current accepted speed for service of underserved is 100 Megabits per second (Mbps) download & 20 Mbps upload and unserved 25 Mbps download & 3 Mbps upload.

6. Escalating Costs: For a decade or so, one could estimate a fiber build at \$40,000 (aerial, tethered to existing utility poles) per mile, however, since the global pandemic, costs have escalated to \$60,000-\$100,000 per mile.

REGIONAL NEEDS

1. Last-Mile Service in The Rural Communities: Of the 129 towns across the region, all have some internet connection, but the region has a smattering of unserved locations across all 8 counties, approximately 60,000 households.

2. Limited Consumer Choice, Limited Price-Competitiveness: While most of the region's residents have service, most only have one choice for service.

3. Limited Municipally Controlled Open-Access Middle-Mile: to reduce or stabilize costs for the next 30 years:

- a. School districts (impact to school taxes)
- b. Emergency service operations (impact to County 911 budgets)
- c. Governmental networks (impact to shared service budgets).

4. Limited Redundancy Options: a one-option route, without alternative path to service can cause outages during rain, snow or ice storms (or accidents).

5. Limited Economic Development Options: new site development must have adequate fiber infrastructure to support technology-related business growth. In addition, for those residents without high-speed access, they may not be aware of new career opportunities.

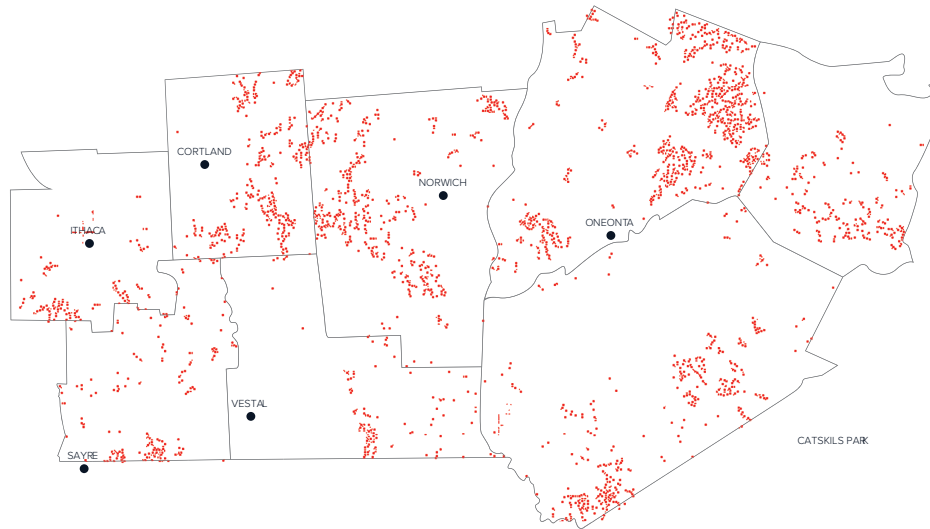
6. Promote the assets and smart-applications available in the urban areas and economic development sites for community and economic development growth.

In July 2020, Southern Tier 8 Regional Board recognized rural internet limitations and inequities and organized a region-wide Broadband Collaborative to build community capacity, assess the need at a granular level and develop last-mile solutions.

REGIONAL BROADBAND COLLABORATIVE PURPOSE STATEMENT:

"To assess current limitations, build community capacity and align resources to position communities for expansion of broadband infrastructure, bringing improved internet access across Broome, Chenango, Cortland, Delaware, Otsego, Schoharie, Tioga & Tompkins Counties."

2022: 60,000 HOUSEHOLDS “IN NEED”



Source: Southern Tier 8 Regional Board, 2022 NTIA Areas of Need FCC 477, 2022 NYS address points with FCC map Type Residential Technology Cable/Fiber Speed 25/3 Mbps or greater Data As Of Dec 31, 2022 (Last Updated: 10/24/23) BB RDOF and Phase 3 removed.

UPDATE: In order to assess infrastructure needs, the Regional Board maintains a community survey <https://betterconnection.org/>. The Regional Board and 8 County Planning Directors addressed the two FCC federal map challenges in 2023 and 2024, to best position the region for anticipated NTIA public funding opportunities. The most current publicly held map (used to prioritize federal funding) that is maintained by the FCC can be explored at: <https://broadbandmap.fcc.gov/>

To reduce private sector investment costs and encourage fiber expansion in the most rural communities, Southern Tier 8 and Chenango and Otsego County Planning Departments secured funding under ARC's ARISE grant and worked with Rural Innovation Strategies Inc (RISI) to develop a <https://connecthumanity.fund/southern-tier-8/> for expanding middle-mile broadband infrastructure in **Chenango and Otsego Counties**. Seeking to implement the plan, the partners are currently pursuing public investment (grants and municipal funding) and private sector partners.

2024 RESULTS: INCREASED PUBLIC & PRIVATE INVESTMENT & LOWER CONSUMER COSTS

Since 2021, the **Broadband Collaborative** (Staff, County Planning Directors, Southern Tier Network, Inc and BOCES) built community **capacity** and provided **technical assistance** with educational resources & national expertise, **advocacy, data, project development, community outreach** (including 3 annual regional conferences with 125-200 attendees at each event.)

Under Empire State Development, New York State's Governor Hochul established the ConnectAll office to build the State's digital infrastructure and connect all New Yorkers through the internet. The ConnectALL Office oversees the statewide digital equity plan and administers over \$1 billion in public investments across the state and anticipated NTIA BEAD (National Telecommunications and Information Administration's Broadband Equity, Access, and Deployment program, as funded in response to the pandemic recovery efforts under the 2021 Infrastructure & Investment Jobs Act)

This community development work **resulted in NTIA BEAD/NYS ESD's Connect All investment of \$87 million for 17,997 households (\$4,834 per hardest-to-serve, most rural households)** across Chenango, Cortland, Tioga and Schoharie Counties.

The estimated cost infrastructure per household: \$4,834, over **25 years of service** (IRS depreciation cost) or **\$193 per household, per year of service**, with a household or consumer cost of **\$55-\$99/month**.

ENERGY INFRASTRUCTURE

ENERGY DISTRIBUTION & STATE POLICY CHALLENGES:

Decades of Rural Dis-Investment & “Interruptible Power” Practices:

Because of the region’s shrinking population and manufacturing decline over the last 3 decades, energy companies have not invested or built capacity for growth across the Region, this lack of reliable energy is being noticed across all 8 counties. In 2020, the Regional Board prepared the “Regional Energy Infrastructure Assessment and Strategy” look at the limitations, assets and encourage advanced, reliable, and resilient energy infrastructure that promotes long-term regional economic growth.

<https://southerntier8.org/regional-news/resources>

The communities of Norwich, Sidney, and Oneonta have been greatly impacted by the “Interruptible Power” practice to limit natural gas delivery during peak usage times for hospitals, universities, and businesses. This practice not only results in the increased costs of businesses maintaining an older energy system with the use of Fuel #2 and coal energy systems, but therefore also producing an increased amount of greenhouse gas emissions. The limited availability of reliable energy has proven to be a significant limitation to industrial and manufacturing growth.

COAL PLANT CLOSURES

The direct loss of coal power plant jobs, rail job loss, and the supporting industries and services from coal industry decline in rural areas where other employment opportunities are few, has resulted in displacement of the prime age population and high levels of poverty for those remaining and exacts a heavy socio-economic toll. (2019, New York State Department of State)

1. Cayuga NY Coal Power Plant: was a 322.5-megawatt coal-fired power station located in Lansing, NY (Tompkins County). October 2019, the facility permanently closed a power generating plant. At the time of its deactivation the facility employed approximately 80 individuals. The Plant contributed over 20% and 13% of Lansing School District and Town of Lansing taxes, respectively. Future plans for the site include the construction of a power intensive data center with on-site solar electric generation capacity. Neighboring counties Tioga, and Cortland were also workforce and support ecosystem impacted.

2. Jennison Coal Power Plant: was a 73,000 kilowatts coal-fired power station (closed in 2000) located in Bainbridge, NY (Chenango County). It was one of three plants built by NYSEG in the 1940s that doubled the generating capacity in south central New York. Neighboring counties Cortland, Otsego, Delaware, and Broome are also workforce and support ecosystem impacted.

3. Westover Coal Power Plant: was a 119-megawatt coal-fired power station (closed in 2012) located in Johnson City, and served 16 distressed census tracts in Broome County, NYS’s largest cluster of distressed census tracts. Neighboring counties Tioga, Cortland, Delaware and Chenango have also been workforce and support ecosystem impacted.

In 2004, only 15% of New York State’s electric grid was powered by coal. This percentage was reduced in half by 2011 to 7%, and again in 2012 when it was reduced to just 3% of New York State’s power supply. * Power Plant closures can have significant impacts on communities, such as job losses and loss of tax revenues. These losses coupled with the outmigration of the population have left a negative impact on this region. Source: “For coal plants in New York, the future appears bleak, 2013.”

STATE POLICY

In 2019, the Climate Leadership and Community Protection Act (CLCPA) was signed into law, and is one of the most ambitious climate laws in the nation to “reduce greenhouse gas emissions and achieve net-zero emissions, increase renewable energy usage, and ensure climate justice.”

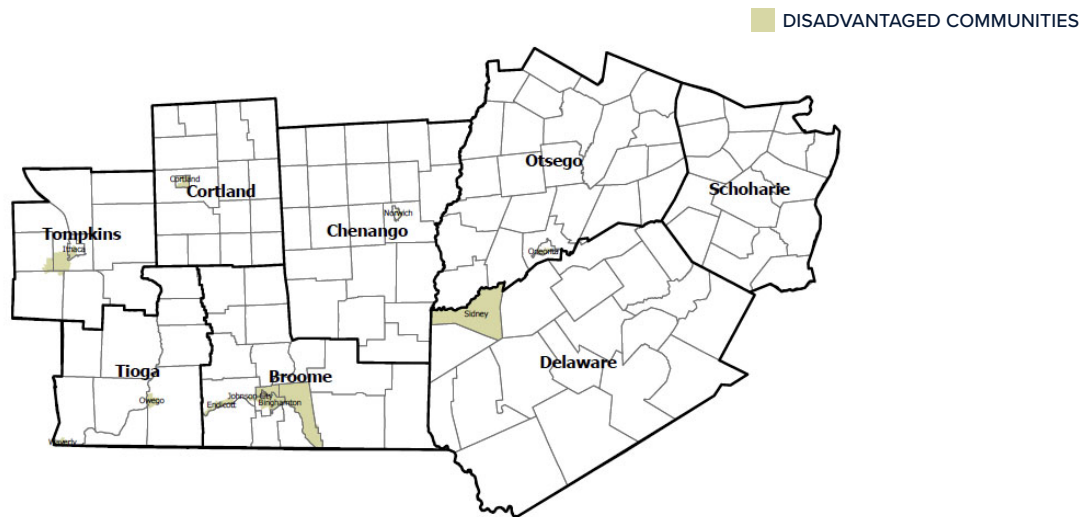
The CLCPA sets the following target reductions from a 1990 baseline:

- **70%** renewable power generation by 2030
- **100%** zero emissions by 2040
- **6000 MW** solar energy by 2025
- **185 trillion** BTU reduction through energy efficiency
- **3000 MW** energy storage by 2030

STATE PRIORITY AREAS

Recognizing that climate impacts do not impact all communities the same way, and not all have the same resources to mitigate, in 2023, the State designated disadvantaged communities (DACs). Disadvantaged communities are defined in the CLCPA as communities that bear burdens of negative public health effects, environmental pollution, impacts of climate change, and possess certain socioeconomic criteria, or comprise high-concentrations of low- and moderate- income households. Approximately 20% of the Southern Tier’s population resides in a DAC.

MAP 6: DISADVANTAGED COMMUNITIES IN OUR REGION



STATE POLICY UPDATE: To meet current energy needs, the State started assessing the use of nuclear technologies and drafted a 2024 Blueprint for advanced nuclear energy. As of January 2025, New York State has plans to draft a Master Plan for Responsible Advanced Nuclear Development, due in 2026.

It is not clear what communities across the Southern Tier will be engaged for this development.

More information can be accessed here: <https://www.nyserda.ny.gov/All-Programs/Advanced-Nuclear-Energy>

LOCAL PLANNING UNDERWAY: Southern Tier 8 Regional Board and Chenango, Otsego and Delaware County are working with non-profit Take Charge NY! to locate and assess technology for establishing local microgrid facilities to support industrial site development.

CAPACITY BUILDING: Each County Planning Department maintains a Hazard Mitigation Plan, where natural disaster risks to all critical infrastructure are well defined and should be considered with any community and economic development infrastructure project. In 2022, the Regional Board was awarded a multi-year grant from the NYS Department of Environmental Conservation (under the Climate Smart Communities program) to facilitate local climate adaptation and resilience planning and help build community capacity for energy infrastructure improvements that support the CLCPA.

THE ANALYSIS

Faced with an unprecedented global pandemic, the CEDS committee and Regional Board started addressing Recovery and Resiliency goals in March 2020; in 2022, a business survey was conducted, and a community survey was hosted in the summer of 2023. Since that time, more than 80 community stakeholders contributed their time to participate in this planning initiative and develop evolving strategies continuously being implemented. Progress is being documented on the organization's website, where one may find the Region's defined goals, current programs, recent investments, annual progress, and noted performance measurements.

STRENGTHS • OPPORTUNITIES • ASPIRATIONS • RISKS

STRENGTHS

Throughout the local strategic planning initiatives and the regular CEDS "Sync-Up" sessions, an identified strength would be a commitment to local investment and development. While it may still be a goal of the EDD to continue to increase regional collaboration, strong locally-based strategic planning is critical to economic success and stability. With all eight counties being involved in local planning efforts, these efforts help identify the needs and strengths of the community at a localized level. These efforts primarily focused on changes that may be of interest to the community while the community survey focused on the strengths of the communities to encourage community buy-in and pride.

Community survey insight: 137 strength variables identified. Of these respondents, over half (51%) of the people claimed that community support & involvement were strengths of their community. Almost a quarter (24%) claimed that their community being small and quiet was a strength and a primary reason they live in the region. Around one in six claimed that local businesses, farmers markets, or the arts (17%); the people (15%); or the youth and community activities (15%) were strengths of the community. There were other smaller percentages of responses from 2-6% that can be found in the appendix.

OPPORTUNITIES

Online business survey insight: Key findings include workplace leaders needing training to help managers deal with their own stress, 40% of respondents value programs that address Substance Use Disorder (SUD), and many saw benefit in educating

employees on healthy alternatives. In addition to these desired changes, at least 50% reported financial losses due to well-being concerns, and about 40% of these changes are all opportunities to increase the quality of life & productivity and decrease financial losses.

The quarterly CEDS "Sync-Up" sessions were all about opportunity. In each meeting, the Regional Board was able to encourage listening and promotion of events and programs by community members and economic development leaders. The aspects mentioned each quarter changed, but it was a core part of community inclusion and spreading regional alignment (and start to developing the Build Back Better Regional Challenge application). The meeting set-up and design is an opportunity in itself to continue to provide a platform for discussion and collaboration across the eight counties.

Community survey insight: 120 opportunity variables identified. One-third of people (34%) believe that businesses and tourism, particularly on Main Street, were opportunities for their community visions. Almost a quarter (23%) believe that activism and inclusion are opportunities. The remaining variables range from 5-13% indicating a variety of different opinions for development, including youth & community involvement (13%), population growth & diversity (particularly from NYC; 10%), unsure or "not much" (10%), youth remaining after schooling or education in general (9%), building or housing improvements (9%), political changes (either recently elected officials or the replacement of current; 6%), and more accessible public transportation (5%). The remaining five variables not listed receive only 1-2% and can be found in the appendix.

ASPIRATIONS

By encouraging a local approach, aspirations were both local and regional. The local strategic planning efforts allowed for each county to identify what was most important for them to continue to advance on within their smaller communities while the CEDS “Sync-Up” sessions allowed for more regional aspirations to be identified. These aspirations included but were not limited to increased industry diversity, specialization with the clean energy industry through the EDA Tech Hub designation, increased quality of life, decreased cost of living, and increased accessible health dimensions.

Community survey insight: 130 aspiration variables identified. Around a quarter of respondents want more business diversity and Main Street activity (28%), or they want more togetherness and collaboration (24%). One in five (20%) people want more community and sporting events. 17% of respondents want more housing and/or less luxury housing. Around one in ten want better health care and Substance Use Disorder assistance (11%), population growth (11%), and youth involvement (10%). The remaining variables range from 1% - 7% and can be found in the appendix.

RISKS

While community members were not asked to identify risks, there are some identified within ST8’s survey analysis, various CEDS committee meetings, private sector communications, etc. Some of these risks are regionally significant while others are global issues.

Population Loss: Population loss is a major issue for the region. With an aging population as identified in the background summary, there is a fixed income for a larger portion of the community and makes them more vulnerable to economic shocks. Similarly, prime age people are remaining in the area since the interests are currently going to the majority, the elderly, which limits the ability for industry to remain in the area resulting in decreased tax revenue.

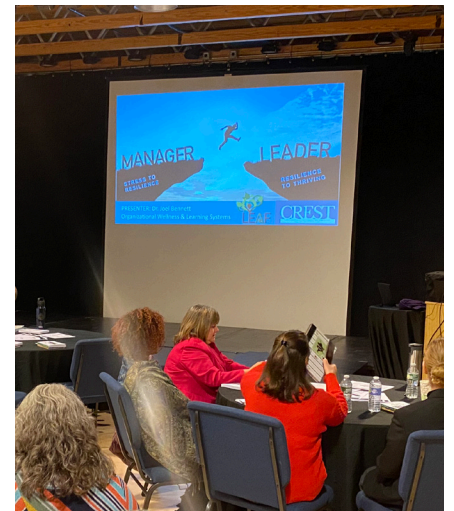
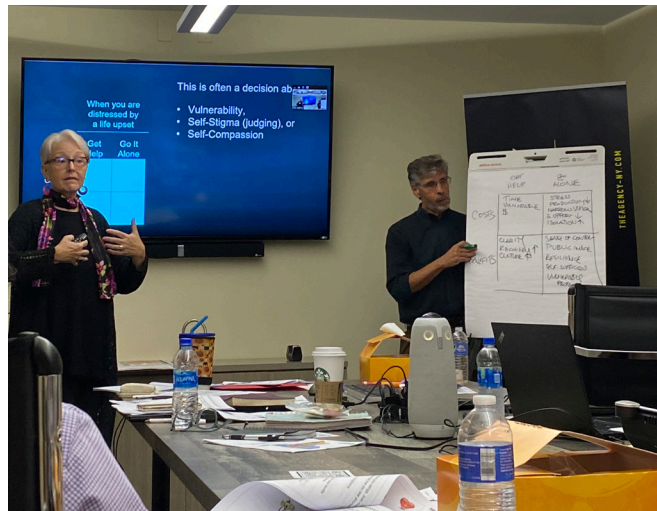
Cultural Divide: Due to the high diversity level and high migration levels, there can be a sense of cultural division. With some being territorial over the region, there are some discouraging the increase in new community members, without realizing the danger that the current population loss poses to the regional integrity. This polarization and othering of people can result in a variety of issues including violence, higher crime rate, low community involvement, higher poverty, etc.

Extreme Heat & Flooding: Extreme heat and flooding are both issues that will put pressure on the existing infrastructure. With an already lacking infrastructure, the community may be put into a difficult position in the case of a natural disaster, which is becoming statistically more likely with the current climate trends. Currently, the definition of a flood plain (from the probability of a once-in-a-hundred-year flood) is becoming larger (to a once-in-a-thousand-year flood) due to the unpredictable nature of weather patterns. Across the region, local communities have experienced major flooding events over the last 20 years and recognize the economic cost to mitigate. With our geographic position, we are extremely vulnerable to proximity to hurricanes from the Atlantic Ocean, the flooding of the Susquehanna River, mountains that create deep valleys that funnel water toward communities, and a variety of other potential risks.

Federal & State Policy: Being a Development District, makes the Regional Board’s role in government very unique. As the corridor between federal and state government to local government, there can be confusion on how we can help. A major disadvantage point in recent years is New York State’s loss of two congressional representatives since 2016. This loss particularly harms our region because it is such a large geographical area. In 2022, the re-districting process caused us to move from three representatives to only two. With over half a million people who reside here, the interests of the region cannot be properly represented with that density. The population has steadily increased for centuries in the U.S., and we can expect New York State to continue to grow in population with the new arrivals in New York City that are being guided to our region due to the lower cost of living. With current congressional standards and a lack of additional representatives with such a large, expected influx of residents, our diverse and large region will continue to be overlooked.

Without the proper state or federal assistance, the region is vulnerable to an economic shock from assisting new arrivals with no existing network and too few resources. Without necessary resources and a new arrival network, increased migration poses a risk to the welfare of the community. Some believe that New York State policy tends to focus on the capacity and existing network in New York City (NYC) without considering how these policies may negatively impact upstate and more rural communities. There is not an existing strong immigration network in our region like in the New York City Region. However, it is expected that there will be an increased policy to encourage the migration of recent foreign arrivals to upstate New York due to its proximity to NYC, and our region’s relatively lower cost of living. Since we are the corridor between federal & state government with local government, we must follow the regulations of both and try to succeed even when both parties do not agree, which can be a risk to our authority and trust with either agency.

STRATEGIC ALIGNMENT



GOALS SUMMARY

While choosing our economic development strategy goals, we were intentional about following July 2023 Economic Development Administration (EDA) priorities and the 2022-2026 Appalachian Regional Commission (ARC) Strategic Plan. In 2025, these were updated to reflect community changes and EDA's Investment Priorities. Each of our goals was designed to both fit the needs and results that the community wants to see while coupled with our federal partners' interests.

REGIONAL GOAL 1 ECONOMIC DEVELOPMENT & MANUFACTURING



REGIONAL GOAL 2 WORKFORCE INVESTMENT



REGIONAL GOAL 3 CRITICAL INFRASTRUCTURE

REGIONAL GOAL 4 REGIONAL ADVANCEMENT & INNOVATION ECOSYSTEM DEVELOPMENT



REGIONAL GOAL 5 COMPLIANCE, CAPACITY BUILDING & DISASTER RESILIENCY

REGIONAL

GOAL 1

ECONOMIC DEVELOPMENT & MANUFACTURING

EDA Investment Priority: **Manufacturing**

ARC Strategic Investment Goal: **Building Appalachian Businesses**

OVERVIEW:

The competition for regional business development outside the Southern Tier is very intense with proximity to major markets. The Southern Tier continues to lag the state and the nation in job loss restoration caused by the COVID-19 pandemic. As a region that endured one of the largest industry out-migrations in the nation, the local communities were especially vulnerable to the pandemic's economic impact.

UPDATE: Although the region faces population losses, the manufacturing culture is strong across the Southern Tier, with an Industry Location Quotient (LQ) of 1.34 & Average Wage of \$75,459. Recognizable manufacturing centers include Chobani Yogurt, Amphenol, Lockheed Martin, BAE Systems, Toyota's Raymond Corporation, CMP Advanced Mechanical Solutions, Custom Electronics, Upstate Shredding, Byrne Dairy, Mallinckrodt Pharmaceuticals, Corning, Inc and many smaller manufacturers across the region.

In 2022, one of the United States' first gigafactories IM3NY invested \$180 million in a former IBM Endicott, NY plant. Unfortunately, on January 28, 2025, the Lithium-Ion Cell manufacturing declared bankruptcy.

With Micron's promise to invest \$50 billion in Upstate, NY to manufacture Semiconductor chips, the region is anticipating supply chain development. In 2024, semiconductor supply-chain manufacturer Menlo Micro announced a \$50 million investment in Tompkins County.

Across the Southern Tier, current manufacturers, the New Energy New York Energy Storage Coalition, and Micron supply-chain are committed to domestic manufacturing and technology growth. The community partners are excited to support private sector investments with site preparation, industrial park expansion and brownfield remediation to expedite small business and manufacturing growth.

STRATEGY 1A:

SUPPORT INDUSTRIAL SITE DEVELOPMENT

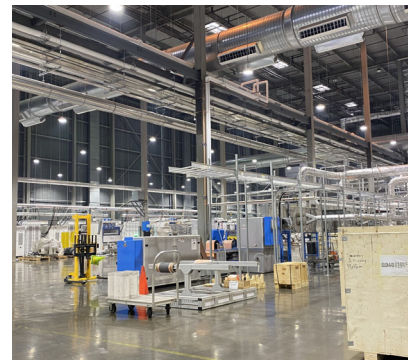
Support County & Municipal Planning Departments with Brownfield Redevelopment
Support County and Municipal Industrial Development Agencies with Industrial Site development (design, engineering, deconstruction, construction, expansion)



STRATEGY 1B:

CONTINUE SUPPORT FOR SMALL BUSINESS SUPPORT AGENCIES

Support Manufacturing Extension Partnerships (MEPs) County IDAs, SBDCs, Industry Associations, Chambers launch or expand small Business &/or manufacturing programs



STRATEGY 1C:

SUPPORT SUPPLY CHAIN DEVELOPMENT

(New York State Economic Development Council [NYS EDC], New York Battery and Energy Storages [NY-BEST], Alliance for Manufacturing & Technology [AM&T], Aid & Incentives for Municipalities [AIM])



STRATEGY 1D:

INCREASE SALES TO NEW NATIONAL MARKETS

(New Energy New York [NENY], Alliance for Manufacturing & Technology [AM&T])



REGIONAL GOAL 2 WORKFORCE INVESTMENT

EDA Investment Priority: **Workforce**

ARC Strategic Investment Goal: **Building Appalachia's
Workforce Ecosystems**

OVERVIEW:

Over the last several years, workforce development is the most common issue raised by private and public sector partners. With several partners developing the industry supply chain, the skills needed are constantly evolving to provide a ready workforce. Community demographics of an aging population, and poor youth retention are primary contributors to low prime-age population. While there is an excellent post-secondary educational system in our region, many students either receive their education and leave, or they leave to receive an advanced education and don't return. Of those who have completed a post-secondary degree, the region (45.8%) is above the US rate of 44.4%. However, when considering those with a bachelor's degree or higher, the region (32.8%) falls behind national standards (35.1%). This greatly impacts the wage potential of the community and limits those trying to build wealth. However, educational availability must adapt to meet the changing needs of the market.

Southern Tier 8 has previously partnered with a variety of workforce partners to promote local workforce investment programs while expanding regional synergy. Over the last few years, Southern Tier 8 has led the Recovery to Work ecosystem development to build capacity across each of the 8 counties, align training opportunities and promote workplace wellness as an option in increasing retention for local employers, as an approach to both reach a vulnerable group in the region while meeting our workforce needs with emerging industries.

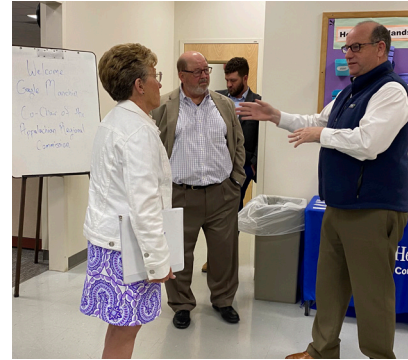
With such an aging population, the region must prioritize making the local job market desirable for those looking to find a long-term location no matter their initial economic vulnerability level. The size of many businesses in the region is also much smaller than typical. This expands the skills needed to perform a job since it may encompass multiple responsibilities to account for business size.

Another barrier to employment that affects many in vulnerable positions, like those in active recovery, is inaccessibility to healthcare due to a lack of healthcare professionals. The Appalachian Regional Commission has a J-1 Visa Waiver Program designated to help with this lack of healthcare professionals. The program ensures that physicians receiving these waivers are practicing a minimum of forty hours a week of primary care or specialty medicine within an area within Appalachia experiencing a Health Professional Shortage. These providers would be assigned a location to practice for a minimum of three years. The benefits of this program could be life-changing for those needing workforce development, but have complex health needs that may not qualify them for government assistance.

STRATEGY 2A:

CONTINUE SUPPORT FOR SMALL BUSINESS SUPPORT AGENCIES

Support for Workforce Investment Boards, Chambers, Cornell Cooperative Extensions programs that support small businesses



STRATEGY 2B:

ALIGNING LOCAL PRIME-AGE (AGES 25-54) WORKFORCE WITH JOBS & RETENTION

Supporting new or expanding Workforce Programs focused on fulfilling local private sector job need, including support to reduce stigma for those in recovery and supporting the Recovery-to-Work Ecosystem development, workplace wellness and wrap-around services.



STRATEGY 2C:

SUPPORT APPRENTICESHIP & INTERNSHIP PROGRAMS

Support Apprenticeship and internship programs with Boards of Cooperative Educational Services [BOCES], Workforce Development Board [WFDBs], High Schools, Cornell Cooperative Extension [CCEs]



STRATEGY 2D:

STRENGTHEN PATHWAYS TO WEALTH-CREATING POSITIONS

Encourage the alignment of local industry workforce needs with Colleges & Universities workforce opportunities



REGIONAL GOAL 3 CRITICAL INFRASTRUCTURE

EDA Investment Priority: **Critical Infrastructure**

ARC Strategic Investment Goal: **Building Appalachia's Infrastructure**

OVERVIEW:

The Southern Tier is a large diverse region with urban and rural corridors with aging water and wastewater infrastructure and, in many cases, a lack of new services for broadband and energy. Interstate 86 construction and designation is still incomplete. Many businesses have stated the need to improve air service to the region. Reasonable air service is considered a key factor in business location.

Since 2004, Southern Tier 8 has been raising awareness of the need for improved broadband infrastructure development and improved digital accessibility, affordability and literacy across our geographically diverse region. Southern Tier 8 has also written several implementation requests, including Southern Tier Network development and expansion. In 2009, New York's Office of Critical Infrastructure established the Broadband Program Office, and in 2015, the \$500 million "New" New York State Broadband Program was launched to build last-mile residential infrastructure across the State, now managed by Empire State Development.

Southern Tier 8 continues to recognize the need to support the I-86 designation while partnering with local communities to assess needs, connect to regional resources, and identify funding opportunities, including the Appalachian Highway Development System. New York State's new energy strategies aim to greatly reduce emissions in buildings and transportation, which will require significant changes to our utility infrastructure.

Southern Tier 8 Regional Board is recognized as the lead agency for Broadband Infrastructure development for all 8 Counties. In 2020, we started our local workforce initiative and support professional development needs with County Planning Departments to define the local challenges and investment opportunities.

Other infrastructure development opportunities include industrial site assessment, improvement, and development; highway-access, **UPDATE:** energy infrastructure, supporting shared services for stormwater and wastewater infrastructure improvement; and energy infrastructure improvements.

FUNDING:

The Infrastructure Investment Jobs Act (IIJA) Or Bipartisan Infrastructure Law:

In 2021, the IIJA set forth a \$65 billion investment in broadband infrastructure across the United States, and New York's leading agency was organized as Empire State Development's (ESD) Connect All Office to develop and implement the state-wide program.

Under IIJA, US Commerce's National Telecommunications and Information Administration (NTIA) will administer the Broadband Equity, Access, and Deployment (BEAD) Program, with \$664 million allocated for New York State. Additional funding opportunities may be available under the Middle-Mile Infrastructure Program, Digital Equity Act Programs and private sector investment.

UPDATE: This community development work resulted in NTIA BEAD/NYS ESD's Connect All investment of \$87 million for 17,997 households (\$4,834 per hardest-to-serve, most rural households) across Chenango, Cortland, Tioga and Schoharie Counties. The estimated cost infrastructure per household: \$4,834, over 25 years of service (IRS depreciation cost) or \$193 per household, per year of service, with a household or consumer cost of \$55-\$99/month.

STRATEGY 3A:

SUPPORT THE REGIONAL BROADBAND COLLABORATIVE WITH EFFORTS TO IMPROVE MIDDLE-MILE AND CONNECT THE MOST REMOTE LAST-MILE LOCATIONS

Continue regional cross-boundary planning efforts to identify needs, potential solutions and funding opportunities that support public and private partnership construction, especially in our most rural underserved communities



STRATEGY 3B:

SUPPORTING ENERGY INFRASTRUCTURE ADAPTATION AND IMPROVEMENTS ASSIST

Assist communities to comply with NYS regulations and update energy infrastructure with the NYS DEC Climate Smart Communities [CSC] program.



STRATEGY 3C:

SUPPORT WATER, WASTE-WATER, ENERGY, AND SITE INFRASTRUCTURE IMPROVEMENTS AND EXPANSIONS FOR COMMUNITY DEVELOPMENT

Support local municipal improvements and expansions for housing and community growth and Industrial Development Agencies [IDA] that encourage economic development growth.



REGIONAL GOAL 4 INNOVATION ECOSYSTEM DEVELOPMENT & REGIONAL ADVANCEMENT

EDA Investment Priority: Innovation & Entrepreneurship
**ARC Strategic Investment Goal: Building Leaders, Local Capacity
& Building Regional Culture and Tourism**

OVERVIEW:

The Region's roots and entrepreneurial spirit are once again being recognized for Innovation & Entrepreneurial Ecosystem Support.

In 2022, Binghamton University, in collaboration with Nobel Laureate Dr. Stan Whittingham, secured a \$113 million EDA Build Back Better Regional Challenge (EDA BBB RC) grant to accelerate American Li-Ion battery R&D, workforce development and supply-chain expansion, a \$1.5 million ARC IJJA investment to assist local supply-chain entrepreneurs develop their product. The New Energy New York (NENY) Coalition was established, and in 2023, NENY was designated as a US Battery Manufacturing Tech Hub, spanning all 14 Appalachian New York counties. In 2024, NENY was awarded one (of 10) of the USA's first NSF Engines designation to initially receive up to \$15 million through 2026, with potential of up to \$160 million over 10 years.

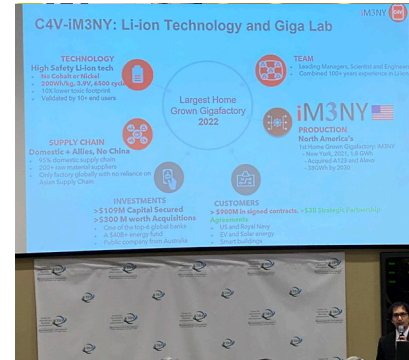
With the recent infusion of public investment in the innovation ecosystem, for the place-making to be successful and maximize the opportunity, the community must now embrace the concept of growth and encourage the entrepreneurs to not only build their business here, but build their life here too, in the Southern Tier. All partners must not only support community & economic development programs, but also support and encourage others to enjoy the special community assets, natural resources and attractions that make the Southern Tier "home".

The Regional Board is designed to work across local boundaries with State and Federal partners to encourage collaboration with Counties and community partners across the mapped ecosystem, with the intent to utilize all the unique regional assets and raise the prosperity of the community as a whole. With a combination of regional conversation, collaboration, accessibility, and advocacy, we can advance the region collectively rather than letting any community fall behind. Our region is innovative, with a rich array of sports, culture, arts, theater, and entertainment and our venues are affordable for families. Our region is located close to many attractive areas including a short bus ride to large metro areas. And with ample water resources, and places to disconnect, not just high-tech, but also agriculture and tourism industries can innovate and thrive.

STRATEGY 4A:

CONTINUE TO BUILD A REGIONAL LOCAL-OWNERSHIP ENTREPRENEURIAL COMMUNITY

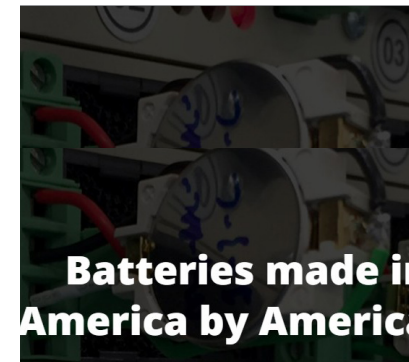
Support community incubators & accelerators like Southern Tier Koffman, the Institute of Rural Vitality at SUNY Cobleskill, Otsego Innovation Center, Rev, Center for Agricultural Development & Entrepreneurship, Groundswell Incubator Farm & expansions of these programs.



STRATEGY 4B:

SUPPORT ADVANCEMENT OF THE NEW ENERGY NEW YORK BATTERY TECH HUB (NENY TECH HUB) AND INTEGRATION OF THE NEW YORK SEMICONDUCTOR MANUFACTURING AND RESEARCH TECHNOLOGY INNOVATION CORRIDOR

Support the ecosystem development across Appalachian NY/Southern Tier/NENY Battery Tech Hub, And the NY SMART I-Corridor Tech Hub and NSF's Upstate New York Energy Storage Engine

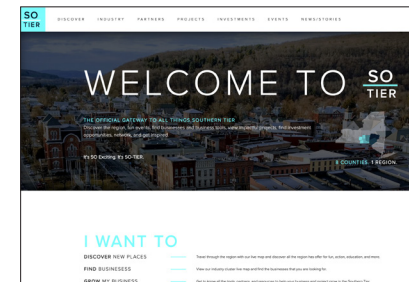


STRATEGY 4C:

PROVIDE OPPORTUNITIES FOR INCREASING COLLABORATION EFFORT TO REMOVE BOUNDARIES & ENCOURAGE CONVERSATION FOR BUSINESS & COMMUNITY BUILDING

Continue to work with ecosystem partners to host networking events to bring industry-focused individuals from both private and public sectors to learn about the potential growth and details of the region's industries, share best practices, and spearhead collaboration.

<https://southerntiersummit.com>



STRATEGY 4D:

INCREASE ACCESSIBILITY TO LOCAL RESOURCES & COMMUNITY ASSETS ACROSS THE SOUTHERN TIER

Promote the amazing local business development resources, community assets, investment opportunities & local events in the Southern Tier's shared partnership "calendar of events"

at <https://www.so-tier.com>



REGIONAL GOAL 5 COMPLIANCE, COMMUNITY CAPACITY BUILDING & RESILIENCE

EDA Investment Priority: Economic Recovery Resilience
ARC Strategic Investment Goal: Building Appalachia's Infrastructure

OVERVIEW:

The Southern Tier is a part of the Rust Belt, Northern-Appalachian, and Mid-Atlantic region. ARC's mission is to "innovate, partner and invest to build community capacity and strengthen economic growth in Appalachia to help the region achieve socioeconomic parity with the nation." While many opportunities are on the horizon, the Southern Tier as a whole, (including the 8 of the 14 counties in Appalachian NY) still continue to lag behind the rest of New York State, Appalachia and the USA with employment across most industries. Between 2017 and 2022 (most recent data available) The USA employment grew by 8%, New York State by 4%, and the Southern Tier's employment declined another 2.7% (the region is about 11% behind the rest of the USA, and 7% behind the rest of New York State) with recent industrial growth. (Data source: Woods & Poole, 2024 Complete Economic and Demographics Data Source). Farming & Forestry is the only industry that grew ahead of the national trend (2017-2022 USA change in employment -0.7 Region +1.0%).

Without significant private sector investment and growth, the communities have continued to decline and witness smaller budgets, and less philanthropic resources available to support community needs. Budget, resources and the supportive workforce is small. Municipal staff is limited with time to understand new regulations and mitigation efforts. While the region has faced 30 years of industrial decline, major widespread snow and flooding events, and a global pandemic, the community partners have become experienced in sharing services, developing innovative community capacity approaches and being resilient. As the CEDS

partners support their local needs, many partners are recognizing their role in the Southern Tier's Innovation Ecosystem, and are truly excited to expand wealth-creating opportunities for the residents of the Southern Tier.

The Regional Board supports local municipalities and holds the communities' institutional knowledge with Federal and State Regulations regarding water quality and energy infrastructure, the staff host educational programs where resources are shared and therefore reduce the expense for the individual municipality in meeting regulatory reporting and mitigation projects. Serving as a liaison between local and state and federal agencies allows the Regional Board to see a broad range of community solutions over time and serve as a resource for new community leaders or public sector staff. During the pandemic, the understanding of long-term dis-investment allowed the Regional Board to understand complex multi-county infrastructure challenges and address the broadband infrastructure development expeditiously.

Hosting an Opportunity Zone Portfolio of projects allows smaller communities the same ability to showcase and scale up investment opportunities as larger communities. Launching the Southern Tier's 1st Recovery-to-Work Ecosystem allowed Southern Tier 8 to help local non-profits connect to more community partners, prepare federal grant applications and proper reports, the program also prepared the workforce development partners to then track community performance in the subsequent EDA Regional Challenge Investment.

Continuing to partner with the U.S. Department of Defense and host Innovative Readiness Trainings (IRT) across the region not only provides no-cost medical care to local residents, but it also provides the local emergency responders and community leaders with an understanding of local needs, and how to improve local processes and community outreach.

Community Capacity programs don't often make headlines for jobs created or business development, but they do provide the public sector with their own local community-driven workforce program for creating efficiencies and building community resiliency skills that allow a "place" and a "home" for private sector investment, growth and prosperity.

STRATEGY 5A:

BUILDING COMMUNITY CAPACITY FOR MITIGATION PLANNING EFFORTS & IMPLEMENTATIONS

Supporting programs that mitigate local disaster impacts (pro-active planning to reduce the potential disaster to the community). (NYS DEC's Climate Smart Communities [CSC] & US Department of Defense's Innovative Readiness Training [DoD IRT], County Planning Hazard Mitigation Plans)



STRATEGY 5B:

SUPPORTING SUSTAINABLE HOUSING STRATEGIES THAT EXPEDITE PRIVATE INVESTMENT

Promoting and expanding local programs with county and regional partners for re-use, redevelopment and new construction (County Planning, Local Housing Coalitions, Landbanks, and others)



STRATEGY 5C:

SUPPORTING THE ESTABLISHED BROOME-TIOGA STORMWATER COALITION WITH THE SHARED SERVICE APPROACH

Offering program management, technical resources, public engagement and reduced local reporting efforts for the Broome Tioga Stormwater Coalition [BTSC] across 15 municipalities in the Binghamton Municipal Separate Storm Sewer System (MS4) .



PROJECT PRIORITY LIST 2023 - 2024

PROJECT	LAUNCH	ARC INVESTMENT PRIORITY (FY2022-2026)	EDA INVESTMENT PRIORITY (JUNE 2025)
GOAL 1 • ECONOMIC DEVELOPMENT & MANUFACTURING - Regional Goal Areas (FY2023-2027)			
Catalyst Connection Manufacturing the New Energy Economy in Northern Appalachia	2023	Building Appalachian Businesses	Economic Recovery Resilience
Cobleskill Ag. Society Community Kitchen	2023	Building Appalachian Businesses	-
Cornell & Rev Ithaca Startup Works Hardware Accelerator Expansion	2023	Building Appalachian Businesses	Innovation & Entrepreneurship
Lt. Warren E. Eaton Airport Expansion Study	2024	Building Appalachian Businesses	Manufacturing
New Energy New York	2023	Workforce Ecosystems	Innovation & Entrepreneurship
Richfield Springs Eco-Business Park	2023	Building Appalachian Businesses	Manufacturing
Sheffield Industrial and Commercial Park	2023	Building Appalachian Businesses	Manufacturing
Tioga County Industrial Pocket: PEMB Buildings	2023	Building Appalachian Businesses	Manufacturing
Ithaca Shared Kitchen	2025	Building Appalachian Businesses	Manufacturing
IAED Tech Transfer Hub	2025	Building Appalachian Businesses	Equity & Manufacturing
CORE - TW Career Opportunities in Rural Education - Transformative Workforce	2019	Workforce Ecosystems	Workforce
Collaborative Recovery Empowerment of the Southern Tier (CREST)	2021	Workforce Ecosystems	Workforce
Healthcare and Wellness Program Development and Equipment	2022	Workforce Ecosystems	Workforce
Turning Businesses Into Classrooms	2021	Workforce Ecosystems	Workforce
Mechatronics / Industrial Maintenance Training Project	2022	Workforce Ecosystems	Workforce
Closing The Gap - Student-Workforce Mentoring	2022	Workforce Ecosystems	Workforce
GOAL 2 • WORKFORCE INVESTMENT - Regional Goal Areas (FY2023-2027)			
Broome Tioga Workforce Ready for Work	2023	Workforce Ecosystems	Workforce
CADE: Expanding Meat Processing	2024	Building Businesses	Workforce
Delaware Chamber: Mentoring Students	2024	Workforce Ecosystems	Workforce
Delaware County Electric Cooperative Line-Worker Training Program Development	2023	Workforce Ecosystems	Workforce

PROJECT	LAUNCH	ARC INVESTMENT PRIORITY (FY2022-2026)	EDA INVESTMENT PRIORITY (JUNE 2025)
Ithaca Area Economic Development Direct To Work Pathways to Employment	2023	Workforce Ecosystems	Workforce
North 4 Recovery-to-Work (ARC INSPIRE)	2023	Workforce Ecosystems	Workforce Development
Norwich Childcare Program	2024	Workforce Ecosystems	-
ONC BOCES: Driving the Regional Economy	2023	Workforce Ecosystems	Workforce
Regional Recovery-to-Work Ecosystem Support	2023	Workforce Ecosystems	Workforce
The Inn at Kirkside Virtual Food Hub	2023	Building Businesses	Workforce
Aligning Learning Investments for Growth & New York's Tech Hub (ALIGN NY TECH)	2025	Workforce Ecosystems	Workforce
The Inn at Kirkside Virtual Food Hub	2023	Building Businesses	Workforce
Southern Tier ON-RAMP	2024	Building Businesses	Workforce
SUNY Delhi - DCEC Lineworker Training Program	2023	Building Businesses	Workforce
Tioga County Regional Career Tech Center	2025	Building Businesses	Workforce
Ithaca Shared Kitchen	2024	Building Businesses	Workforce
Tompkins Cortland Community College (TC3): Increasing Tourism Career Pathways	2023	Building Businesses	Workforce
Waverly School District: Project LAUNCH	2023	Building Businesses	Workforce

GOAL 3 • CRITICAL INFRASTRUCTURE ADAPTATION & EXPANSION - Regional Goal Areas (FY2023-2027)

Chenango & Otsego Digital Equity Accelerator	2023	Community Infrastructure	Economic Recovery Resilience
Chenango, Delaware & Otsego: TakeCharge Southern Tier	2024	Community Infrastructure	Critical Infrastructure
Johnson City Downtown Parking Plan & Feasibility Study	2023	Community Infrastructure	-
So-Tier Portal	2024	Regional Culture & Tourism	Economic Recovery Resilience
South WORKS District Infrastructure Upgrade Plan	2023	Building Appalachian Businesses	Economic Recovery Resilience
Southern Tier Network (STN) Expansion to Sherburne	2024	Community Infrastructure	Critical Infrastructure
Otsego & Chenango Broadband Infrastructure	2026	Building Appalachia's Infrastructure	Economic Recovery Resilience

PROJECT	LAUNCH	ARC INVESTMENT PRIORITY (FY2022-2026)	EDA INVESTMENT PRIORITY (JUNE 2025)
Broome County Urban Corridor Connector Trail	2025	Building Appalachia's Infrastructure	Economic Recovery Resilience
Schoharie County Broadband	2025	Building Appalachia's Infrastructure	Economic Recovery Resilience
Cayuga Waterfront Trail Connector	2025	Building Appalachia's Infrastructure	Economic Recovery Resilience
Chain Works District Infrastructure Upgrade Plan	2023	Community Infrastructure	Critical Infrastructure
Appalachian Region Community-Owned Grid Resilient Infrastructure Project (ARCO-GRIP)	2023	Community Infrastructure	Critical Infrastructure

GOAL 4 • REGIONAL ADVANCEMENT & CAPACITY BUILDING - Regional Goal Areas (FY2023-2027)

Appalachian Region Community-Owned Grid Resilient Infrastructure Project	2023	Leaders & Local Capacity	Critical Infrastructure
Broome County Innovation District Fiber Enhancement and Smart Cities Plan	2021	Community Infrastructure	Critical Infrastructure
Broome County Strategic Plan	2023	Leaders & Local Capacity	Economic Recovery Resilience
Chenango County 2050 Vision Plan	2023	Leaders & Local Capacity	Economic Recovery Resilience
Cortland County Strategic Development Plan	2024	Leaders & Local Capacity	Economic Recovery Resilience
Delaware County Strategic Action Plan	2023	Leaders & Local Capacity	Economic Recovery Resilience
Otsego Lake Comprehensive Action Plan	2024	Leaders & Local Capacity	-
New Energy New York	2023	Building Capacity & Tourism	Innovation & Entrepreneurship
Broome IRT Medical Mission	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Chenango County Shovel Ready Inventory	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Regional (Pre-Construction) Site Readiness	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Endicott Brownfield Opportunity Area	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Binghamton Plaza Redevelopment	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Brandywine Brownfield Opportunity Area	2025	Building Capacity & Tourism	Innovation & Entrepreneurship
Regional HOUSING (Housing Opportunities to Uplverage & Scale Investment For New Growth) Project	2025	Building Capacity & Tourism	Innovation & Entrepreneurship

GOAL 5 • COMPLIANCE, CAPACITY BUILDING & RESILIENCY - Regional Goal Areas (FY2023-2027)

Delaware IRT Medical Mission	2023	Leaders & Local Capacity	Economic Recovery Resilience
Otsego County Strategic Prioritization Plan Update	2023	Leaders & Local Capacity	Economic Recovery Resilience
Schoharie County Comprehensive Housing Study	2023	Leaders & Local Capacity	Economic Recovery Resilience

PROJECT	LAUNCH	ARC INVESTMENT PRIORITY (FY2022-2026)	EDA INVESTMENT PRIORITY (JUNE 2025)
Tompkins Strategic Plan Operations Plan	2023	Leaders & Local Capacity	Economic Recovery Resilience
Tioga County Strategic Operations Plan	2023	Leaders & Local Capacity	Economic Recovery Resilience
Schoharie County Comprehensive Housing Study	2023	Leaders & Local Capacity	Economic Recovery Resilience
Climate Smart Communities (CSC) Technical Assistance Program	2023	Community Infrastructure	Economic Recovery Resilience

EVALUATION FRAMEWORK

GOALS	DESCRIPTION	POTENTIAL PARTNERS	IMPLEMENTATION PERFORMANCE METRICS
GOAL 1 • ECONOMIC DEVELOPMENT & MANUFACTURING			
Strategy 1A	Support Industrial Site Development	IDAs	Tally of Sites Improved, expanded or created
Strategy 1B	Support For Small Business Support Agencies	Manufacturing Extension Partnerships (MEPs) County IDAs, SBDCs, Industry Associations, Chambers	Efficient Support Agencies, Community Engagement for Local Leadership & business leaders
Strategy 1C	Support Supply Chain Development	New York State Economic Development Councils, New York Battery and Energy Storage, Alliance for Manufacturing & Technology & additional MEPs, Industrial Development Agencies, Economic Developers, High Schools, Businesses	Partner expansion, Increased Supply Chain Efficiency through Local Sourcing, Expansion of partners in Southern Tier and across Appalachia
Strategy 1D	Increase Sales to New National Markets	New Energy New York, Alliance for Manufacturing & Technology, Chambers of Commerce, Industrial Development Agencies, Economic Developers, Small Business Development Centers, Businesses, and Regional Economic Development Councils	Increase in LQ, Increased National Market Presence for identified industries
GOAL 2 • WORKFORCE INVESTMENT & EDUCATION INVESTMENT			
Strategy 2A	Continue Support For Small Business Support Agencies	Workforce Investment Boards, Chambers, Cornell Cooperative Extensions	Success At Local Small Businesses

GOALS	DESCRIPTION	POTENTIAL PARTNERS	IMPLEMENTATION PERFORMANCE METRICS
Strategy 2B	Aligning Local Prime-Age Workforce with Jobs	Workforce Investment Boards, Chambers of Commerce, Regional Economic Development Councils, Colleges and Universities, Local Businesses, Industrial Development Agencies, and Economic Developers	Stable Unemployment Ranging From 3-5% For Prime Age Workforce, Increased Connection With Private Sector & Private Sector Needs
Strategy 2C	Support Apprenticeship & Internship Programs	Boards of Cooperative Educational Services, Workforce Development Board, Cornell Cooperative Extension, Economic Developers, Industrial Development Agencies, High Schools, Businesses, Educators, and Policy Makers	Increased Completed Programs & Job Offers
Strategy 2D	Strengthen Pathways to Wealth-Creating Positions	New Energy New York Coalition, Colleges & Universities, J-1 Visa Program	Increase Residential Post-Secondary Education Recipients, Increase Number of Manufacturing positions and Healthcare Professionals Per Capita

GOAL 3 • CRITICAL INFRASTRUCTURE

Strategy 3A	Support the Regional Broadband Collaborative with Efforts to Improve Middle-Mile and the Most Remote Last-Mile Locations	Planning Teams, Counties, Municipalities, Economic Developers, Industrial Development Agencies, Businesses, Policy Makers, State Broadband Office, and Southern Tier Network	Increased Access To Middle Mile Locations & Last-Mile Rural Residents
Strategy 3B	Supporting Energy Infrastructure Adaptation And Improvements	Planning Teams, Counties, Municipalities, Economic Developers, and Industrial Development Agencies	Increased Community And Industrial Sites With Diverse Energy Solutions; Increased Municipalities Meeting State Regulations
Strategy 3C	Support Water, Waste-Water, Energy, And Site Infrastructure Improvements And Expansions For Community Development	County Planning Departments, Industrial Development Agencies, Climate Smart Communities, Municipalities, New York State Energy Research and Development Authority, Businesses	Increased Infrastructure Improvements For New Housing Or Community Assets

GOAL 4 • REGIONAL ADVANCEMENT & INNOVATION ECOSYSTEM DEVELOPMENT

Strategy 4A	Continue To Build A Regional Local-Ownership Entrepreneurial Community	Southern Tier Koffman, The Institute Of Rural Vitality At SUNY Cobleskill, Otsego Innovation Center, Rev, Center For Agricultural Development & Entrepreneurship, Groundswell Incubator Farm	Increase Of Successful Start-Up Companies Across The Southern Tier
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GOALS	DESCRIPTION	POTENTIAL PARTNERS	IMPLEMENTATION PERFORMANCE METRICS
Strategy 4B	Support Advancement of the New Energy New York Battery Tech Hub (NENY Tech Hub) and Integration of the New York Semi-conductor Manufacturing and Research Technology Innovation Corridor	Appalachian NY/Southern Tier/ NENY Battery Tech Hub Coalition Partners, Respective Edds, NY Smart I-Corridor Tech Hub Coalition Partners, And NSF's Upstate New York Energy Storage Engine Coalitions	Increase Project Alignment With Tech Hub Including Infrastructure Adaption, Increase In Completed EDA Public Works Grants & ARC Power Site Developments, Community Engagement In Tech Hub Advancement, Region-Wide Tech Hub Advancement
Strategy 4C	Provide Opportunities for Increasing Collaboration Effort to Remove Boundaries & Encourage Conversation for Business & Community Building	Industry Summit Platform, Community Of Practice, Chambers Of Commerce, Tourism Professionals, Planning Teams, Social Organizations	Increased Participation With Economic Diversity, Increases In Lq Of Five Main Sectors Of Diversification, Increased Value-Added Services And Average Wages In Essential Sectors With Low Salaries
Strategy 4D	Increase Accessibility to Local Resources & Community Assets across the Southern Tier	United Way, County Planning Departments, Public & Private Transportation Departments, Social Organizations, Private Sector	Increased Utilization Of Resources And Assets, Lower Poverty Rate, Increase Workforce Participation Rate; Increased Private Sector Investment

GOAL 5 • COMPLIANCE, CAPACITY BUILDING & RESILIENCY

Strategy 5A	Building Community Capacity for Mitigation Planning Efforts & Implementation	County Planning Depts, Municipal Leaders, Climate Smart Communities, Dept Of Defense	Prepared Workforce, Reduction In Flood Impact
Strategy 5B	Supporting Sustainable Housing Strategies that Expedite Private Investment	County Planning Depts, Municipal Leaders, IDAs, Realtors, Developers, Local Housing Organizations, State And Federal Housing Organizations, State Policy Makers	Increased Reconstructed And New Housing For The Local Workforce
Strategy 5C	Supporting the established Broome Tioga Stormwater Coalition with the Share Service Approach	15 Municipalities In Broome & Tioga Counties Binghamton's MSA; Upper Susquehanna Coalition, County Planning And Public Works Departments	Meeting Or Exceeding National And State Stormwater Permit Requirements, Increasing Best Management Practices

"From the staff at Southern Tier 8, thank you for your time and energy in developing this regional plan. I look forward to working with everyone to bring these ideas and concepts to fruition!"

JEN GREGORY - Executive Director of Southern Tier 8

SOUTHERN TIER 8 TEAM

JEN GREGORY, Executive Director

LOLENE CORNISH, Secretary & Meeting Coordinator

LILLIAN RICE - Economic Development Specialist

COLLABORATORS

JOE MIHALKO, CEDS Chair - Southern Tier 8 Regional Board & Broome County Clerk

MARK PATTISON, Deputy Secretary of State/Governor Hochul's ARC alternate

KYLE WILBER, ARC Program Manager

GEORGE KORCHOWSKY, ARC Assistant Program Manager

STACEY DUNCAN, CEO - Leadership Alliance Greater Binghamton Chamber of Commerce & The Agency Broome County IDA/LDC

BETH LUCAS, Director - Broome County Planning Dept.

JOE MOODY, Director - Town of Union Economic Development Dept.

BOB MURPHY, Executive Director – Broome-Tioga Workforce NY

BRENDAN O'BRYAN, Executive Director & CEO - Cortland County Business Development Program & Cortland County IDA

JOEL BOYD, Assistant Director – City of Binghamton Economic Recovery & Development

SARAH GLOSE, Director - City of Binghamton Economic Development

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BOB HAIGHT, President & CEO – Cortland Area Chamber of Commerce

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RAY PUCCI, PRESIDENT - Delaware County Chamber of Commerce

AMY BUGGS, Director - Cayuga Cortland Workforce Development Board

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TAMMIE HARRIS, Director - Otsego County Planning Department

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SABRINA HENRIQUES, President & CEO - Tioga County Chamber of Commerce

HEATHER MCDANIEL, President - Ithaca Area Economic Development

KATIE BORGELLA, Commissioner of Planning & Sustainability - Tompkins County

TOM KNIPE, Deputy Director - City of Ithaca Economic Development

JEFF SMITH, Tier Energy Network

ROBERT SWEET, Jr., Regional Director - Southern Tier Regional Office NYS Empire State Development Corp.

EVAN MASLIN, Deputy Regional Director - U.S. Senate Majority Leader Charles E. Schumer

AMANDA SPELLICY, Regional Director - U.S. Senate Majority Leader Charles E. Schumer

CAROL MILLER, Executive Director - AM&T

PER STROMHAUG, Associate Vice President - Innovation and Economic Development at Binghamton University & Regional Economic Competitiveness Officer NENY

OLGA PETROVA, Binghamton University's Office of Entrepreneurship & Innovation Partnerships

JEFF DUBRAVA, Business Development Manager - AM&T

ROB CORPORA, County Manager – Cortland County

ALICE SAVINO, Executive Director - CDO Workforce

CHUCK SCHWERIN, Managing Director - Business Services for Ithaca Area Development

TOM KOWALIK, President - Kowalik & Associates

JULIE PACATTE, Executive Director - Schoharie Economic Enterprise Corp.

NATALIE ABADESSA, Business & Workforce Development Specialist - The Agency

BOB JEFFREY, Chair & Board of Supervisors – City of Norwich Wards 4, 5, & 6

ERIK SCRIVENER, Community Development Director – City of Norwich

BEAU HARBIN, Vice-Chair & Legislator (LD 2) – Cortland County

ALLEN HINKLEY, Supervisor – Town of Roxbury

SEAN PENCHOFF, Economic Development Specialist – Delaware County Economic Development

MICHELLE CATAN, Representative (LD 4) - Otsego County

ALICIA TERRY, Board of Supervisors – Town of Gilboa

SHANE NICKLE, Director - Schoharie County Planning & Community Development

BARBARA ROBERTS, Legislator (LD 3) - Tioga County

BRITTANY WOODBURN, Deputy Director - Economic Development & Planning Tioga County

GREGORY MEZEY, Legislator – Tompkins County

SUSAN RYAN, Legislator (LD 11) - Broome County

APPENDIX:

1. ACRONYM LIST

CEDS – Comprehensive Economic Development Strategy	ACS – American Community Survey
ARC – Appalachian Regional Commission	PCI – Per Capita Income
EDA – Economic Development Administration	NYS – New York State
LDD - Local Development District (Southern Tier 8 Regional Board for ARC)	TEN – Tier Energy Network
EDD - Economic Development District (Southern Tier 8 Regional Board for EDA)	ESL – English as a Second Language
REDC – Regional Economic Development Council	SUD – Substance Use Disorder
SOAR – Strengths, Opportunities, Aspirations, and Risks	PCHH – Per Capita Household
NENY – New Energy New York	MHI – Median Household Income
BOCES – Board of Cooperative Educational Services	HH - Household
IDA – Industrial Development Agency	ISP – Internet Service Provider
NY-BEST – New York Battery & Energy Storage Technology	STN – Southern Tier Network
ESD – Empire State Development	FTTH – Fiber to the Home
CEI – Clean Energy Incubator	CLCPA - Climate Leadership and Community Protection Act
NYSERDA – New York State Energy Research and Development Authority	DAC – Disadvantaged Community
ST8 – Southern Tier 8 Regional Board	NYSEG – New York State Energy & Gas
IIJA – Infrastructure Investment & Jobs Act	EDD – Economic Development District
BTWD – Broome-Tioga Workforce Development	IRT – Innovation Readiness Training
AM&T - Alliance for Manufacturing & Technology	NYS EDC – New York State Economic Development Council
SUNY – State University of New York	AIM – Aid & Incentives for Municipalities
SBIC – Small Business Investment Company	CCE – Cornell Cooperative Extension
SBIR – Small Business Innovation Research	NTIA - National Telecommunications and Information Administration
USDA – United States Department of Agriculture	BEAD - Broadband Equity, Access, and Deployment
US DOT – United State Department of Transportation	CSC – Climate Smart Communities
LQ – Location Quotient	HAB – Harmful Algi Bloom
GDP – Gross Domestic Product	BTSC – Broome Tioga Storm Coalition
BEA – Bureau of Economic Analysis	ARISE – Appalachian Regional Initiative for Stronger Economies
NAICS – North American Industry Classification System	POWER – Partnership for Opportunity and Workforce and Economic Revitalization Initiative
BLS – Bureau of Labor Statistics	BBBRC – Build Back Better Regional Challenge
CADE – Center for Agricultural Development & Entrepreneurship	INSPIRE – Investments Supporting Partnerships in Recovery Ecosystems Initiative
SEEC – Schoharie Economic Enterprise Corporation	

2. CURRENT FEDERAL PARTNERS INVESTMENT PRIORITIES

ARC 2022–2026 STRATEGIC INVESTMENT GOALS

- Building Appalachian Business
- Building Appalachia’s Workforce Ecosystems
- Building Appalachia’s Infrastructure
- Building Regional Culture and Tourism
- Building Community Leaders and Capacity

EDA INVESTMENT PRIORITIES

- Climate Resilience
- Equity & Inclusion
- Workforce Development
- Broadband

3. CURRENT TECH HUB DESCRIPTION & BENEFITS

TECH HUB DESIGNATIONS IN ECONOMIC DEVELOPMENT DISTRICT:

LEAD AGENCY: Binghamton University

APPLICANT-DEFINED REGION: Southern Tier (ST) of New York, comprising 14 counties with ~1M residents; spans 3 Economic Development Districts (ST West: Allegany, Cattaraugus, Chautauqua; ST Central: Chemung, Schuyler, Steuben; and ST: Broome, Tioga, Tompkins, Otsego, Cortland, Delaware, Schoharie, Chenango).

Core Technology Area: end-to-end battery development and manufacturing

CONTACT: neny@binghamton.edu

The New Energy New York Battery Tech Hub (NENY Tech Hub), led by the State University of New York (SUNY) Binghamton, aims to bolster battery technology development and manufacturing across the entire value chain. This Tech Hub will expand on the momentum of a growing battery manufacturing cluster in the Southern Tier of New York by engaging with the state's first battery gigafactory, the region's 700+ small and medium-sized manufacturers, and the nation's first battery pilot manufacturing and development center. The NENY Battery Tech Hub seeks to address critical gaps in the domestic battery supply chain and meet the growing demand for energy storage, a crucial part of the clean energy transition.

<https://www.eda.gov/funding/programs/regional-technology-and-innovation-hubs/2023/New-Energy-New-York-Battery-Tech-Hub>

LEAD AGENCY: CenterState Corporation for Economic Opportunity

APPLICANT-DEFINED REGION: Buffalo; Rochester; and Syracuse MSAs and Ithaca; Auburn; and Batavia MSAs in upstate New York

Core Technology Area: semiconductor manufacturing

CONTACT: Robert Simpson (rsimpson@centerstateceo.com), Benjamin Sio (bsio@centerstateceo.com)

The New York Semiconductor Manufacturing and Research Technology Innovation Corridor (NY SMART I-Corridor Tech Hub), led by CenterState Corporation for Economic Opportunity, aims to enhance regional semiconductor manufacturing capabilities while ensuring economic opportunity for underserved communities. This Tech Hub will coordinate across the region's significant semiconductor fabrication investments, adjacent supply chain assets, scientific capabilities coalitions, and partner coalitions to establish an entrepreneurial and innovation ecosystem that provides career pathways and employment opportunities to the region's historically underserved communities. In doing so, the NY SMART I-Corridor Tech Hub seeks to cement its position as a global leader in semiconductor manufacturing and supply chain sustainability.

https://www.eda.gov/sites/default/files/2023-10/EDA_TECH_HUBS_Designation_Benefits.pdf



4. SUPPORTING DATA:

A. REGIONAL SECTOR ANALYSIS

Southern Tier 8 Region, 2023Q1¹

NAICS	Industry	Current		5-Year History			1-Year Forecast				
		Empl	Avg Ann Wages	LQ	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
61	Educational Services	40,542	\$64,408	2.18	-2,140	-1.0%	3,606	1,891	2,091	-376	-0.9%
62	Health Care and Social Assistance	37,228	\$66,047	1.11	-2,340	-1.2%	3,548	1,759	2,060	-271	-0.7%
44	Retail Trade	25,453	\$36,674	1.09	-2,152	-1.6%	3,052	1,540	2,033	-521	-2.0%
31	Manufacturing	25,432	\$75,459	1.34	-1,128	-0.9%	2,323	1,019	1,732	-428	-1.7%
72	Accommodation and Food Services	19,640	\$24,821	0.98	-2,653	-2.5%	3,420	1,549	1,875	-4	0.0%
92	Public Administration	13,831	\$62,142	1.29	-1,009	-1.4%	1,127	565	802	-239	-1.7%
81	Other Services (except Public Administration)	9,798	\$31,117	0.98	-446	-0.9%	1,111	496	684	-69	-0.7%
23	Construction	9,648	\$56,904	0.69	-61	-0.1%	806	337	601	-132	-1.4%
54	Professional, Scientific, and Technical Services	9,032	\$68,833	0.52	212	0.5%	741	298	511	-68	-0.7%
48	Transportation and Warehousing	7,436	\$48,707	0.64	1,019	3.0%	822	361	527	-66	-0.9%
56	Administrative and Support and Waste Management and Remediation Services	6,759	\$44,231	0.45	-831	-2.3%	731	331	484	-84	-1.2%
52	Finance and Insurance	6,674	\$82,862	0.71	-124	-0.4%	531	236	387	-93	-1.4%
42	Wholesale Trade	5,109	\$66,270	0.58	-1,007	-3.5%	486	209	356	-78	-1.5%
11	Agriculture, Forestry, Fishing and Hunting	3,959	\$30,445	1.30	52	0.3%	436	220	281	-66	-1.7%
71	Arts, Entertainment, and Recreation	3,804	\$28,866	0.83	-242	-1.2%	566	237	328	1	0.0%
51	Information	2,780	\$54,931	0.58	-621	-4.0%	252	96	174	-19	-0.7%
53	Real Estate and Rental and Leasing	2,615	\$46,178	0.63	-505	-3.5%	229	121	149	-41	-1.6%
55	Management of Companies and Enterprises	1,747	\$77,552	0.48	168	2.0%	139	61	103	-25	-1.4%
22	Utilities	1,475	\$105,514	1.25	121	1.7%	100	51	90	-41	-2.8%
21	Mining, Quarrying, and Oil and Gas Extraction	626	\$69,062	0.75	67	2.3%	57	21	44	-8	-1.3%
99	Unclassified	490	\$46,856	1.09	306	21.6%	52	24	34	-6	-1.1%
	Total - All Industries	234,078	\$56,900	1.00	-13,313	-1.1%	24,279	11,235	15,640	-2,596	-1.1%

Source: data.bls.gov
 Data as of 2023Q1
 Note: Figures may not sum due to rounding.
 1. All data based upon a four-quarter moving average.
 Exits and transfers are approximate estimates based upon occupation separation rates.
 Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2022Q4 with preliminary estimates updated to 2023Q1. Forecast employment growth uses national projections adapted for regional growth patterns.

B: MUNICIPAL POPULATION DATA

BROOME COUNTY	2017	2022
Barker town	2,678	2,697
Binghamton city	45,964	47,617
Binghamton town	4,826	4,606
Chenango town	10,896	10,902
Colesville town	5,135	4,856
Conklin town	5,291	4,999
Dickinson town	5,174	5,057
Fenton town	6,486	6,409
Kirkwood town	5,680	5,483
Lisle town	2,707	2,680
Maine town	5,265	5,153
Nanticoke town	1,631	1,514
Sanford town	2,360	2,115
Triangle town	2,868	2,802
Union town	54,817	55,775
Vestal town	28,232	29,912
Windsor town	6,114	5,788

CHENANGO COUNTY		
Afton town	2,773	2,760
Bainbridge town	3,220	3,059
Columbus town	814	939
Coventry town	1,494	1,499
German town	360	245
Greene town	5,297	5,265
Guilford town	2,847	2,729
Lincklaen town	361	292
McDonough town	782	996
New Berlin town	2,570	2,523
North Norwich town	1,707	1,478
Norwich city	6,890	6,950
Norwich town	3,857	3,612
Otselic town	897	836
Oxford town	3,804	3,608
Pharsalia town	674	517
Pitcher town	673	561
Plymouth town	1,949	1,364
Preston town	1,028	983
Sherburne town	3,925	3,949
Smithville town	1,474	1,465
Smyrna town	1,367	1,466

CORTLAND COUNTY		
Cincinnatus town	892	1,019
Cortland city	18,914	17,574
Cortlandville town	8,261	8,390
Cuyler town	853	742
Freetown town	635	866
Harford town	872	923
Homer town	6,313	6,260
Lapeer town	837	817
Marathon town	2,028	1,937
Preble town	1,455	1,299
Scott town	1,039	970
Solon town	1,170	901
Taylor town	499	443
Truxton town	995	1,173
Virgil town	2,537	2,461
Willet town	1,034	980

DELAWARE COUNTY	2017	2022
Andes town	1,050	1,074
Bovina town	673	626
Colchester town	1,956	1,847
Davenport town	2,805	2,964
Delhi town	4,938	4,907
Deposit town	1,762	1,322
Franklin town	2,358	2,465
Hamden town	1,238	1,248
Hancock town	3,092	2,785
Harpersfield town	1,660	1,472
Kortright town	1,425	1,536
Masonville town	1,155	1,118
Meredith town	1,759	1,595
Middletown town	3,580	3,350
Roxbury town	2,288	2,196
Sidney town	5,549	5,544
Stamford town	2,375	2,053
Tompkins town	989	1,247
Walton town	5,298	5,288

OTSEGO COUNTY		
Burlington town	1,145	1,143
Butternuts town	1,864	1,900
Cherry Valley town	1,313	1,020
Decatur town	308	281
Edmeston town	1,766	2,013
Exeter town	818	1,160
Hartwick town	2,047	2,276
Laurens town	2,637	2,173
Maryland town	1,913	1,645
Middlefield town	1,882	1,923
Milford town	2,937	2,828
Morris town	1,824	1,612
New Lisbon town	1,068	1,418
Oneonta city	13,932	14,097
Oneonta town	5,088	5,074
Otego town	2,961	2,777
Otsego town	3,794	3,664
Pittsfield town	1,303	1,118
Plainfield town	903	957
Richfield town	2,147	1,936
Roseboom town	664	766
Springfield town	1,342	1,166
Unadilla town	4,224	4,128
Westford town	835	739
Worcester town	2,035	1,864

SCHOHARIE COUNTY	2017	2022
Blenheim town	323	384
Broome town	790	899
Carlisle town	1,839	1,609
Cobleskill town	6,484	6,179
Conesville town	785	711
Esperance town	1,858	1,749
Fulton town	1,313	1,014
Gilboa town	1,303	1,090
Jefferson town	1,443	1,253
Middleburgh town	3,594	3,154
Richmondville town	2,488	2,440
Schoharie town	3,039	3,131
Seward town	1,664	1,818
Sharon town	1,918	1,812
Summit town	1,066	1,008
Wright town	1,704	1,719

TIOGA COUNTY		
Barton town	8,599	8,547
Berkshire town	1,213	1,166
Candor town	5,087	5,114
Newark Valley town	3,791	3,631
Nichols town	2,712	2,604
Owego town	19,092	18,794
Richford town	1,056	1,089
Spencer town	3,014	2,965
Tioga town	4,758	4,434

TOMPKINS COUNTY		
Caroline town	3,419	3,321
Danby town	3,483	3,397
Dryden town	14,897	13,848
Enfield town	3,616	3,347
Groton town	6,078	5,707
Ithaca city	30,720	31,359
Ithaca town	20,372	19,930
Lansing town	11,454	11,702
Newfield town	5,314	5,080
Ulysses town	4,826	4,864

C. HOUSING VACANCY RATES BY COUNTY

	HOME VACANCY	RENTAL VACANCY
US	1.20%	5.70%
New York	1.30%	4.00%
Regional	1.50%	5.60%
Broome	1.50%	7.90%
Chenango	1.00%	2.40%
Cortland	1.20%	2.60%
Delaware	2.40%	5.10%
Otsego	1.80%	8.80%
Schoharie	2.80%	3.90%
Tioga	0.80%	6.10%
Tompkins	0.80%	2.90%

5. CEDS TIMELINE

MARCH 2020:

- CEDS Committee began addressing Recovery and Resiliency goals continuing to meet weekly 2022:
- Small business survey conducted
- Quarterly CEDS meetings continued 2023:
- Community survey was conducted with in-person participation and online surveys
- Demographic research began with the onboarding of an Economic Development Specialist
- The drafted CEDS strategic goals were approved by the CEDS Committee
- The drafted CEDS was approved by the CEDS Chair

4/28/23 - REGIONAL BOARD MEETING:

CEDS DISCUSSION: COMMUNITY DEVELOPMENT NEEDS (from pandemic recovery strategies to 2023-2028 CEDS, see current numbered goals; <https://southerntier8.org/economic-development-initiatives/>);

NEW ENERGY NEW YORK (NENY):

- The Southern Tier is 1 of 21 communities in the USA selected to re-build the American Supply-Chain & expand manufacturing operations (\$113 million investment)
- This Coalition: <https://newenergynewyork.com/> Southern Tier 8 Regional Board is a Coalition Member, EDD, LDD and matching partner
- Seeking partners in workforce development (BOCES, IDAs, WIBs)
- EVERY Community (County) should be participating (and would likely be eligible for funding)

1. ECONOMIC DEVELOPMENT & MANUFACTURING:

- **IDA Site Development: Planning & Design Awarded**
- Investment site improvements for economic development. (match) NYS Brownfields /Site- Readiness.
- ARC & EDA are economic and community development agencies
- Industry Cluster Development

2. WORKFORCE DEVELOPMENT:

- ARC and EDA funding expansion of programs (WIBs, BOCES, IDAs, Chambers..)
- SUD Recovery Workforce
- To expand: Regional Collaboration & Institutionalize Education-to-Industry Connections
- To expand: Regional Alignment of Assets and Resources with Messaging & Promotion

3. INFRASTRUCTURE IMPROVEMENTS: WATER, SEWER, ENERGY, BROADBAND (SUPPORT HOUSING):

- **Planning County Strategic Plans Awarded** (addressing local housing needs)
- For economic (workplace) AND community development (workforce).
- Promotion of Opportunities (NEW)
- 2022 list (Seeking 2023 funding?)

	COMMUNITY	TYPE OF INFRASTRUCTURE (WATER/SEWER/ BROADBAND)		COST ESTIMATE (ROUGH ESTIMATE FOR CONSTRUCTION OR PLAN)	RATIONALE	POTENTIAL MATCH	NOTES (PENDING APPLICATION CONFIDENTIAL, FOLLOW-UP REQUIRED, ETC)
Delaware	Walton	Site Development	Planning,	\$525,000	Economic Growth	Opportunity Zone	As a 13 acres vacant property, Delaware County IDA would need to create a strategic plan and expand infrastructure into the site Tulip Circle.
Delaware	Sidney	Site Development	Floodplain	\$260,000	Economic Growth	Opportunity Zone	Delaware County IDA has site control and design concepts for bringing site out of floodplain; 10K planning/ \$250K development River Street
Schoharie	Cobleskill					ARPA Funds, CDBG Eligible & IDA Funds Available, Opportunity Zone	349 Mineral Springs Road IDA-owned; Approx 47 acres nearby existing industrial park; less than 2 miles between I-88 Exit 22 & 21; Concept for 82,500 SF + 54,000 SF buildings; Water/Sewer/Natural Gas & Fiber at the curb; Incentives Available; Walkable to the Village and SUNY Cobleskill; Specialized Manufacturing Preferred;Market Report Complete, Site Plan Rendering Available3/29/2022
Schoharie	Cobleskill					ARPA Funds, CDBG Eligible & All Incentives Possible	3793 State Route 145 Gobblers Knob: Approx 340 acres on 4 parcels with two-owners; High capacity & visible site at Exit 22 I-88; concept for 742,500 SF w significant staging and storage; Large-scale distribution & logistics possible;Market Report Complete, Site Plan Rendering Available
Tompkins	Lansing	Bus Facility			Community Development		Construct new TCAT

Chenango	Norwich	Sewer	Town?		Community Development	Applied for State	They started application to ARC but didn't continue.
Schoharie	Cobleskill	Sewer	In need		Health and Safety		Hookups
Tioga	Richford	Sewer	Design		Health and Safety		Alternative Sanitary System
Cortland	Cortland	Stormwater	Town?		Economic Growth		Clinton St/Tompkins St drainage management
Broome	Kirkwood	Water	Town		Community Development		Received inquiry from the Town about a water extension project, but do not have details.
Chenango	Norwich	Water	Town?		Economic/Safety	Applied for State	They started application to ARC but didn't continue.
Tioga	Owego	Water & Sewer	Design		Economic Growth		Rte 434 Design buildout, key economic location
Schoharie	Middleburgh	Water			Health and Safety		Delaware Engineering has some plans;water system upgrade/sidewalk repairs/sewer hookup
Schoharie	Cobleskill	Water/Sewer Extension	In need	\$1,200,000	Economic Growth		Shad Point
Schoharie	Schoharie	Water/Sewer Extension	In need	\$1,500,000	Economic Growth		Schoharie Business Park
Tompkins	Ithaca	Electric grid upgrades			Economic Growth		Ithaca 2030, model across USA
Tompkins	Ithaca	Roads and intersections			Economic Growth		
Total				\$10,610,000			

BROADBAND:

- Planning (FCC Map Challenge, Digital Equity, Last-mile, Middle-Mile expansion)
- Education & Strategic Networking with ISPs (programs and conferences)
- Funding (Grant writing ARC, NTIA, 2024 BEAD?)

RECREATIONAL TRAIL IMPROVEMENT:

- Several County Initiatives

RIVERFRONT DEVELOPMENT:

- LWRP

4. REGIONALISM:

- Quality-of-Life Regional Portal SO-TIER (Asset/ Attraction Development)
- CEDS Sync-Up Sessions
- Industry Summit Platform
- Expanded Regional Growth (Micron (semi-conductor manufacturing plant) in Syracuse; NY- BEST (Battery & Energy Storage) in Rochester)

5. EQUITY & REGIONAL ADVANCEMENT:

- (Likely to re-work with Equity as this is included across all goal areas)

6/2/23 - REGIONAL BOARD MEETING:

A. CEDS, JOE MIHALKO: Jen reviewed the goals below:

• Draft list GOAL AREAS (supported with ARC & EDA & 3 REDC) investments:

1. Economic Ecosystems (ARC's Building Businesses goal, our former "Economic development" goal; New Energy New York; EDA's "Equity" goal: considering the language "historically disadvantaged communities")
2. Workforce Development (ARC's Workforce Ecosystems goal)
3. Infrastructure Adaptation (Broadband, energy, water, sewer, I-86 designation)
4. Regional Attraction (ARC's "Regional Tourism" goal, our former "Marketing and Rural Communities" goal)
5. Community Capacity Development & Effective Planning (ARC's "Community Capacity" Goal)
6. Climate Resilience (formerly under our "Rural Communities" goal)

8/24/23 PUBLIC CEDS MEETING:

1. NEW 5-YEAR PLAN (CEDS) UNDERWAY:

✓ **Goal Areas** (As discussed since March 2020; Still under direction of ARC & EDA):

- o Economic Development
- o Workforce Investment
- o Infrastructure Adaption
- o Regional Advancement
- o Climate Resilience

✓ **Outreach & Participation:**

- o Community Vision Survey: <https://forms.gle/rU3xquSk3MXanGF9> (open until 9/15)-39 respondents-Jen thanked everyone for sharing this.
- o County Planning Depts; Additional Outreach?
- o CEDS – Board meeting on Sept 29th - will review the draft.
- o CEDS Committee Meeting- for Plan Comments October 25th, Lolene will send announcement after Labor Day.

8/24/2023 - 9/31/2023: PUBLIC SURVEY OPEN FOR COMMENTS, 7 RESPONSES:

- Something should be added supporting local eco dev agencies that may have established business relationships and funding opportunities for small businesses in their particular community.
- A suggestion is to consider housing issues as they relate to workforce (affordability, availability, etc.)
- Support workforce housing initiatives to combat the growing housing crisis. Support programs that allow for conversion of older homes to affordably meet CLCPA objectives.
- Support advancements in flood resiliency, stormwater system enhancements and highway asset identification and ratings..
- Create an interactive regional library of resources and asset mapping
- Support of a growing and evolving agricultural economic sustainability (Ex. Regional Farmers Markets, Food Co-Ops, Natural resource business development)" goal)

10/23/2023 TECH HUB ANNOUNCEMENT

11/3/2023 REVIEW OF CEDS DOCUMENT, ADDITIONAL COMMENTS WE RECEIVED...

GOAL 1: ECONOMIC DEVELOPMENT & MANUFACTURING

STRATEGY 1A: Continue to Build a Regional Local-Ownership Entrepreneurial Community

Examples: Support community incubators & accelerators like Southern Tier Koffman, Otsego Innovation Center, Rev, CADE, Groundswell

STRATEGY 1B: Continue Support for Small Business Support Agencies

Examples: Chambers, Cornell Cooperative Extensions, Workforce Investment Boards

STRATEGY 1C: Support Supply Chain Development

Examples: NYS EDC, NYS EDC, NY BEST, AM&T, AIM

STRATEGY 1D: Increase Sales to New National Markets

Example: NENY

Sarah said "it would be helpful to know which ones are more viable."

Jen asked "if there were any new incubators or accelerators for Cortland?"

Trish said "they are just forming a steering committee."

Shane B said "more industry parks are needed."

GOAL 2: WORKFORCE INVESTMENT

STRATEGY 2A: Aligning Local Prime-Age (25-54) Workforce with Jobs

Example: workforce programs

STRATEGY 2B: Support Apprenticeship & Internship Programs

Examples: BOCES, WFDBs, high schools, CCEs)

STRATEGY 2C: Encourage Prime-Age (25-54)Population Retention

Examples:Recovery to Work Workplace Wellness

STRATEGY 2D: Strengthen Educational Pathways to Wealth-Creating Positions

Examples: Colleges & Universities asset mapping with local industry needs (higher ed)

GOAL 3: RESILIENCY & INFRASTRUCTURE ADAPTATION

STRATEGY 3A: Support the Regional Broadband Collaborative with efforts to improve Middle-Mile and the most remote last-mile locations. (cell coverage)

STRATEGY 3B: Update Infrastructure Needs & Challenges with Regional Broadband and Prioritized Energy Development

STRATEGY 3C: Support water, wastewater, and energy infrastructure and site water improvements and expansions for economic development purposes

Examples: County Planning Priorities, IDA needs, CSC Communities, Municipalities

GOAL 4: EQUITY & REGIONAL ADVANCEMENT

STRATEGY 4A: Provide Opportunities for Increasing Collaboration Effort to Remove Boundaries & Encourage Conversation for Business & Community Building

Example: Industry Summit Platform

STRATEGY 4B: Increase Accessibility to Local Resources & Community Assets

Example: So-Tier Portal

STRATEGY 4C: Represent Regional Interest & Southern Tier Identity

Example: So-Tier Portal

GOAL 5: CLIMATE RESILIENCE

STRATEGY 5A: Building Community Capacity for Mitigation Planning Efforts

Examples: Climate Smart Communities & Department of Defense's Innovative Readiness Training

STRATEGY 5B: Supporting Energy & Sustainable Infrastructure Adaptation and Improvements

Examples: Take Charge NY!, Climate Smart Communities

STRATEGY 5C: Supporting the established Broome-Tioga Stormwater Coalition with the Shared Service Approach

Examples: STN across 15 municipalities in Broome & Tioga Counties]

Comments: like to see support for implementation of hazard mitigation plans added here

And "quality of life" issues add a general statement (as IN our Mission- not modifying)

PROMINENT CONCERNS TO ALLOCATE TIME FOR AFTER DISCUSSION

Workforce Affordable Housing : Lilly presented a housing report draft to review. Shelly said the problem in Delaware is short term rentals. They are income properties for downstate owners, not available for people looking for a place to live. So the vacancies really are not vacancies. Tammy asked for Workforce Alignment

8. ANTICIPATED NEW YORK STATE FUNDING OPPORTUNITIES FOR CLIMATE IMPACTED INFRASTRUCTURE IMPROVEMENTS:

Bond Act investments will support an estimated: \$8.71 billion in project spending and 84,000 jobs

Significant labor provisions in the Bond Act will promote good-paying jobs:

- Prevailing wages for Bond Act projects
- Apprenticeship agreements for large state or municipal projects
- Encourage project labor agreements and Buy America provisions

Climate Change Mitigation: \$1.5 Billion

- \$500 million – Zero-emission school buses and charging
- \$400 million – Green Building projects
- \$200 million – Reduce pollution in disadvantaged communities
- \$100 million – Climate adaptation and mitigation
- \$300 million – Other projects, such as:
 - Urban forestry
 - Urban heat mitigation
 - Carbon sequestration
 - Methane emission mitigation

Restoration & Flood Risk Reduction: \$1.1 billion

- \$250 million – Voluntary private property buyouts
- \$100 million – Coastal rehabilitation and shoreline restoration
- \$100 million – Local waterfront revitalization and inland flooding
- \$650 – Other project such as:
 - Raise/Relocate flood-prone roads and infrastructure
 - Adapt dams, bridges, culverts
 - Floodplain, wetland, and stream restoration
 - Forest conservation
 - Endangered and threatened species
 - Land acquisition

Water Quality Improvement & Resilient Infrastructure: \$650 million

- \$250 – Support municipal stormwater grants
- \$200 million – Water infrastructure improvement projects
- \$200 million – Other programs, such as:
 - Green infrastructure
 - Agricultural nutrient runoff
 - Replacing aging and substandard septic systems
 - Harmful algal blooms (HABs)
 - Lead service line replacement

Open Space, Land Conservation & Recreation: \$650 million

- \$350 million – Open space land conservation
- \$150 million – Farmland protection and easements
- \$75 million – Fish hatcheries
- \$125 million – Other projects such as:
 - Recreational infrastructure
 - State and municipal parks
 - Campgrounds

Other Funding Opportunities:

The Bond Act comes at a time of unprecedented state and federal investments to address climate change.

State Budget Victories:

- \$400 million for the Environmental Protect Fund
- \$500 million for Clean Water Infrastructure

Federal Opportunities:

- Infrastructure Investment and Jobs Act (IIJA)
- CHIPS and Science Act (CHIPS)
- Inflation Reduction Act (IRA)



SOUTHERN TIER 8
REGIONAL BOARD



southerntier8.org