



Downtown Economic Resiliency Strategy: West Carthage, Carthage, Wilna & Champion

Prepared by:



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Executive Summary

The Villages of West Carthage and Carthage, along with the Towns of Wilna and Champion, are interested in supporting economic revitalization, resiliency and growth in their communities and downtowns. In June of 2022, the municipalities, with West Carthage as lead, engaged MRB Group to create Downtown Economic Resiliency Strategy to help guide the use of limited local capacity and fiscal resources in pursuing economic development and community projects. As such, this report is the combined work of the partner municipalities and MRB Group, and is informed by various local and regional plans and the input of stakeholders.

The culmination of these efforts is the Action Plan Matrix included in this document. It includes goal areas, strategies/actions, priority levels, timing, rough-order-of-magnitude costs, and relevant potential funding sources and partners. The Action Plan Matrix is arranged into the five thematic “Focus Areas”, namely:

1. Targeted Business Development
2. Hospital Redevelopment
3. Expand Recreational Offerings
4. Updated Zoning & Design Guidelines for the Downtown Areas
5. Quality of Life & Community Vibrancy

Rather than restate the Action Plan Matrix here, we instead summarize below the most important findings of the analysis, all of which guided the recommendations contained in the Action Plan Matrix:

Recreation and entertainment, particularly family and youth activities, will be critical to realizing economic, tourism, and quality of life gains in the Villages of Carthage and West Carthage. Stakeholder feedback indicated that this is the area with the greatest gaps, but also the greatest opportunities. Natural resources (e.g. snowmobile trails, planned rail trail, river, etc.) and developable properties (e.g. hospital professional building, fire site, former school fields, etc.) represent key assets for progress in this area. There are also numerous funding resources that could be viable supports with proper planning, promotion, and collaboration.



Small businesses are the backbone of the downtown area, providing local jobs and contributing to community vibrancy. There are also a number of parcels available in the Villages outside of the downtown areas that would be ideal for **larger business development**, serving

the community with additional jobs and new services/products. A combination of small business supports and business development and attraction activities will help to create a strong economic base, reduce storefront vacancies, enhance opportunity for prosperity, provide more amenities for visitors, and improve quality of life for residents.



The planned **relocation of the Carthage Area Hospital's operations** to outside of Village boundaries presents challenges, including changes in traffic through the downtown areas. Three facilities will be impacted by this move: the main campus, professional building, and Mechanic Street building. This will mean new ownership for each building, and in some cases new uses. However, the redevelopment of these facilities also presents opportunities to fill gaps in the community and economic fabric. For instance, the main campus would provide ideal space for various workforce training programs, and the professional building offers the possibility for creating a recreational hub as it is adjacent to village land that offers river access and that will be part of a regional rail trail.

The current zoning code is outdated and does not include design guidelines for downtown development. This has led to some developments that detract from the Villages' character via more modern facades and large setbacks, and certain provisions likely disincentivize the redevelopment/reuse of some parcels and prevents optimal use of sidewalk and parking infrastructure. Updated zoning and design guidelines for the downtown areas in particular will protect community character, create opportunities for business activity and community engagement, and ensure good stewardship for historic resources into the future.

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Introduction

The Villages of West Carthage and Carthage, along with the Towns of Wilna and Champion, are interested in supporting economic revitalization, resiliency and growth in their communities and downtowns. Recognizing key assets and opportunities, as well as varied state, federal and local funding streams available, the communities needed a strategy to align and outline a critical path forward. In June 2022, the Village of West Carthage, acting as a lead entity in this effort, engaged MRB Group to create a Downtown Economic Resiliency Strategy to identify priority actions and guide collaborative efforts in the coming years.

The Towns and Villages are located west of Watertown and immediately southwest of Fort Drum. The Town of Wilna covers an area of approximately 79 sq miles, while the Town of Champion is about 45 sq miles. The Villages of West Carthage and Carthage make up about 4 sq miles of that area (1.41 sq miles and 2.59 sq miles respectively). The Black River marks the boundary between the Towns and Villages, one of numerous natural resources contributing beauty, recreation, and character to the area. The Villages are most easily accessed via routes 26, 3, and 126. The hamlets of Great Bend and Natural Bridge are also located in the Towns, Great Bend being directly adjacent to Fort Drum. These municipalities already operate with a high level of collaboration, and participate in the River Area Council of Governments for broader regional collaboration.

While other local and regional plans remain relevant with respect to overall strategy, challenges, and opportunities, this Downtown Resiliency Strategy is built around five focus areas that expand upon these efforts and provide specific actions that the municipalities and their partners can act on to move development forward. These action items are informed by recent stakeholder engagement, economic data, and a review of existing conditions.

Framework

The Action Plan Matrix that follows lays out steps that the partner municipalities can take or facilitate to achieve their vision and advance the five focus areas. It includes priority levels, timing, rough-order-of-magnitude costs,¹ and relevant potential funding sources and partners. It is assumed that the four partner municipalities - West Carthage, Carthage, Wilna and Champion - will play some role in activating, facilitating, and/or implementing each action. As such, they are not listed as partners within the matrix. This matrix is designed to serve as a living document that can be updated and adapted as additional strides are made in economic and community development. The five focus areas are:

1. Targeted Business Development
2. Hospital Redevelopment
3. Expand Recreational Offerings
4. Updated Zoning & Design Guidelines for the Downtown Areas
5. Quality of Life & Community Vibrancy

The strategies in the matrix were, in various cases, adapted from prior plans and materials and/or informed by recent interviews with community partners and businesses.

This plan reflects significant current consensus around the following items:

- Recreation is critical to quality of life and future economic development.
- Redevelopment of the existing hospital facilities in the villages presents challenges, but also opportunities to fill gaps in the community and economic fabric.
- Opportunities for improving quality of life and community vibrancy lie in natural resources and public spaces.
- Updated zoning and design guidelines for the downtown areas will protect community character and ensure good stewardship for historic resources into the future.
- Business development and small business supports will provide the foundation for community growth, resiliency, and vibrancy.

¹ Some actions in the matrix may have little or no cash cost, however it is recognized that such items will require the time of municipal staff and other partners.

Action Plan Matrix

FOCUS AREA 1: Targeted Business Development				
STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Conduct a survey of families with school-aged children regarding their childcare needs and gaps.	High	Near Term	\$	Carthage Central School District, Augustinian Academy
Create a comprehensive listing of land available for sale and redevelopment to reference in business development and attraction activities.	High	Mid Term	\$	JCIDA, Carthage IDC, Carthage Area Chamber of Commerce, local realtors, Northern New York Community Foundation
Provide additional technical assistance programming to support new and existing businesses with business plan implementation and business operations beyond planning (e.g. formation, hiring practices, pivoting, COGs management, etc.).	High	Mid Term	\$\$	SBDC, SCORE, JCIDA, Northern New York Community Foundation, ANCA
Secure a microenterprise grant to encourage business development that matches community interest and market gaps (i.e. special food services, clothing/accessory retail, and recreation).	Med	Near Term	\$	NYS HCR CDBG Microenterprise Assistance Program / Economic Development Program, NY State Seed Funding, Carthage IDC
Encourage and facilitate collaboration between and among businesses on programming that increases vibrancy, creates cross promotion, and draws new people to the downtown areas.	Med	Near Term	\$	Market NY, Carthage Area Chamber of Commerce, Northern New York Community Foundation, ANCA

FOCUS AREA 1: Targeted Business Development

STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Work with existing and potential childcare providers on training, planning and capacity building to enable the expansion of available childcare slots in the community as needed, most immediately before and after school care.	Med	Mid Term	\$	NYS OCFS Division of Child Care Services, QUALITYstarsNY, Jefferson-Lewis Childcare Project, Northern New York Community Foundation, SBDC
Work with regional and federal partners to inventory the skillsets of retiring service members at Fort Drum. Leverage this information to identify and attract businesses in sectors needing these skillsets, thereby retaining talent in the area and attracting new business.	Med	Long Term	\$	JCIDA, Fort Drum
Create a site, market, and incentive package to proactively pursue and attract a new hotel/motel/inn.	Med	Long Term	\$\$	JCIDA, Carthage IDC
Partner with a community organization and/or local businesses to provide free/low cost professional services, such as advertising, accounting, or legal support, to existing and new businesses.	Low	Mid Term	\$\$	Carthage Area Chamber of Commerce, Carthage IDC, NYS HCR CDBG Economic Development Program, Northern New York Community Foundation, ANCA

FOCUS AREA 2: Hospital Redevelopment

STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Re-engage parties that have expressed interest in the Main Campus (West Street) for workforce training and other purposes. Identify which party (if any) could/would own the property if leases were in place with all of the parties.	High	Near Term	\$	Carthage Area Hospital, Carthage IDC, JCIDA, nursing home, Jefferson-Lewis BOCES, North Country Community College, SUNY Canton, Northern Border Regional Commission <i>(implementation)</i>
Conduct a property-specific master plan for the reuse/redevelopment of the professional building (Bridge Street) and adjacent Village Rails to Trails land as a recreation hub and community center.	High	Near Term	\$\$	Carthage Area Hospital, Village of West Carthage, Carthage IDC, JCIDA, Jefferson County Soil & Water, Northern Border Regional Commission <i>(implementation)</i>
Create master plan for the overall reuse of the Main Campus facility.	Med	Mid Term	\$\$	Carthage Area Hospital
Consolidate medical offices from the professional building into the Mechanic Street building to make full redevelopment of the professional building possible.	Low	Mid Term	\$	Carthage Area Hospital

FOCUS AREA 3: Expand Recreational Offerings

STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Pursue NYS DOS Local Waterfront Revitalization Program funding to create and implement a comprehensive strategy for development along, access to, and protection of the riverfront area with particular focus on the Village's Rails to Trails site and professional building.	High	Near Term	\$\$	NYS DOS LWRP
Promote existing recreational resources, such as snowmobiling trails, in conjunction with regional partners to attract more visitors and expand the market/demand for recreational businesses and tourism investments.	High	Mid Term	\$\$	Naturally Lewis, Visit Watertown, Jefferson County, Market NY, Jefferson County Soil & Water
Provide more activities for youth and families year-round.	High	Long Term	\$\$	Carthage Central School District, Augustinian Academy, YMCA, Northern New York Community Foundation, Pratt-Northam Foundation
Leverage natural resources to expand outdoor recreational opportunities by developing and promoting experiences that emphasize engaging with the community's parks, riverfront, rail trail, and outdoor spaces.	Med	Long Term	\$\$	USDOT TA Set Aside, NYS Parks EPF, NYS Parks Recreational Trail Program, American Trails Trail Fund, Project for Public Spaces Community Placemaking Grants, USEPA Environmental Education grants, Market NY, Jefferson County Soil & Water, Northern New York Community Foundation, Pratt-Northam Foundation, Northern Border Regional Commission

FOCUS AREA 3: Expand Recreational Offerings

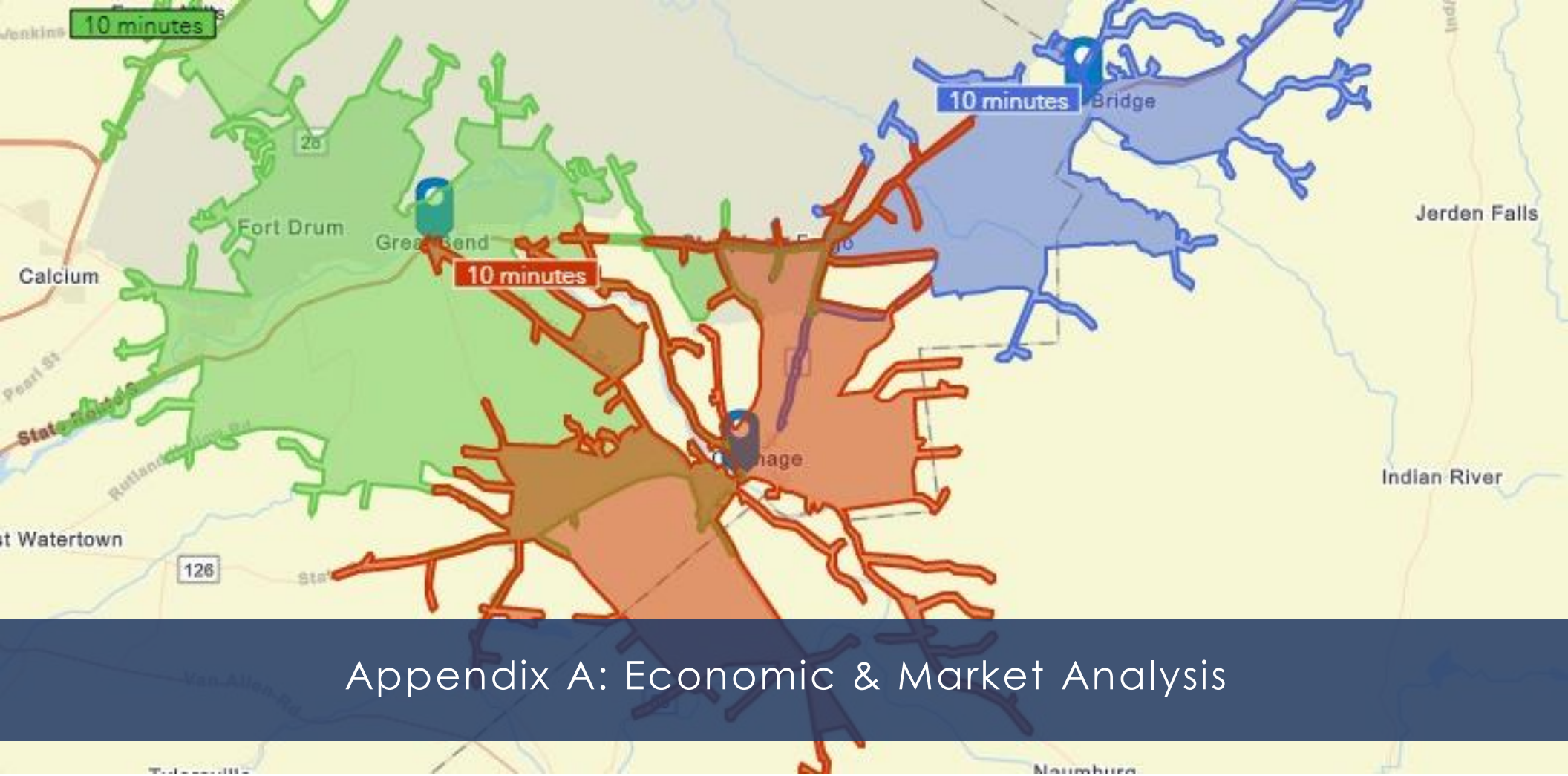
STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Leverage riverfront properties, particularly publicly owned property, to expand and improve water access and water-related programming for residents and visitors.	Med	Long Term	\$\$	Project for Public Spaces, NYS OPRHP EPF, NY OPRHP Land & Water Recreation Fund, NYS DOS LWRP, Market NY, Northern New York Community Foundation, Pratt-Northam Foundation, Northern Border Regional Commission
Work with local organizations and businesses to create and promote additional community events. Consider themes focused on unique community assets/characteristics for a visitor draw.	Low	Mid Term	\$\$	Market NY, Northern New York Community Foundation

FOCUS AREA 4: Updated Zoning & Design Guidelines for Downtown Areas

STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Develop design guidelines to ensure consistent (re)development and maintenance of the area's aesthetics.	High	Mid Term	\$\$	Tug Hill Commission, Jefferson County Planning
Update downtown zoning to allow businesses to utilize sidewalk space and/or temporary "parklets" for dining, displays, etc. where appropriate and safe.	Med	Mid Term	\$\$	Tug Hill Commission, Jefferson County Planning
Amend parking requirements in zoning to they take into account the use(s) of the facility.	Med	Mid Term	\$\$	Tug Hill Commission, Jefferson County Planning, HUD YIMBY
Develop a wayfinding strategy to improve signage for pedestrians and motorists.	Med	Long Term	\$\$	Market NY
Utilize the existing Planning Board Facebook page to offer information and education about the code and development process.	Low	Near Term	\$	Tug Hill Commission, Jefferson County Planning
Explore whether to allow more flexible accessory dwelling units and/or short term rentals in and around downtown areas, as well as what restrictions would be needed to maintain community character.	Low	Long Term	\$\$	Tug Hill Commission, Jefferson County Planning, HUD YIMBY

FOCUS AREA 5: Quality of Life & Community Vibrancy

STRATEGIES & ACTIONS	PRIORITY	TIMING	COST	RESOURCES & PARTNERS
Pursue NY Forward or a combined DRI award to fund transformative redevelopment and infrastructure efforts.	High	Near Term	\$	NYS ESD, Carthage IDC
Create a master plan for the reuse/redevelopment of 263-269 State St (fire site). Leverage the site as flexible and functional community space while awaiting master planning and redevelopment. Invest in temporary seating, walking, and event infrastructure.	High	Mid Term	\$\$\$	CDBG, USDA-RD
Create more inviting and engaging public spaces in and around the downtown area to enhance the shopping, dining, and visiting experience and attract additional foot traffic. This could include public art, landscaping enhancements, and shared outdoor seating/dining spaces.	High	Long Term	\$\$\$	Project for Public Spaces Community Placemaking Grants, NYS HCR, NYS DOS, NY Forward, Northern New York Community Foundation, Pratt-Northam Foundation
Incentivize the development of diverse housing options, including rental, senior, and workforce opportunities, particularly in the downtown areas.	Med	Near Term	\$	485-a, NYS HCR, JCIDA, Restore NY
Implement recommendations from the attached streetscape assessment, prioritizing pedestrian and bicycle safety measures such as curb extensions, bike lanes, and flashing crosswalk signals.	Med	Long Term	\$\$\$	NYS DOT, Safe Streets & Roads Grant, RAISE, TA Set Aside
Seek funding to capitalize a façade program to incentivize and facilitate exterior building improvements through low/no interest loans and/or grants.	Low	Near Term	\$	CDBG, USDA-RD
Connect downtown bike routes to master bike paths being developed regionally.	Low	Long Term	\$\$\$	OPRHP Recreational Trails Program, Parks & Trails NY Partnership Grant, American Trails Trail Fund, People for Bikes, Jefferson County Soil & Water, Northern New York Community Foundation, Northern Border Regional Commission



Appendix A: Economic & Market Analysis

Prepared by:



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Introduction

The following market overview presents information on the current economic conditions within the Towns of Champion and Wilna, particularly the villages of West Carthage and Carthage and the hamlets of Great Bend and Natural Bridge. This analysis includes demographic, industrial, and real estate trends. The data displayed throughout the market profile was collected from numerous sources, as noted below, that collectively depict current market conditions. Insights from the following analysis will provide a foundation for strategic planning purposes in later phases of the project.

Data Note

Data included in the following analysis was sourced from the American Community Survey estimates from the US Census Bureau, Esri, Emsi, and CoStar.

Data Limitations

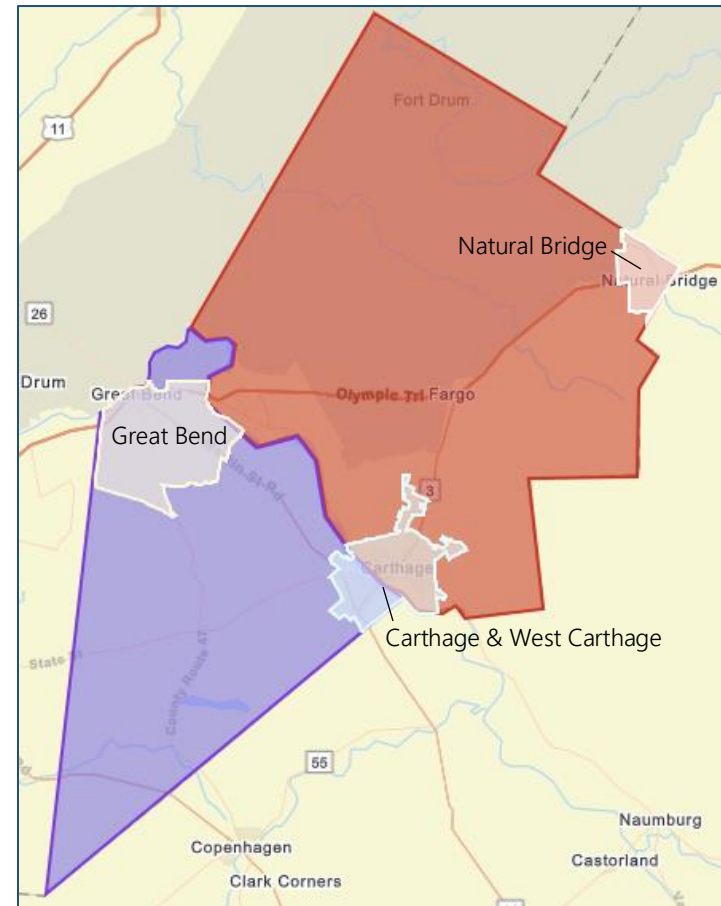
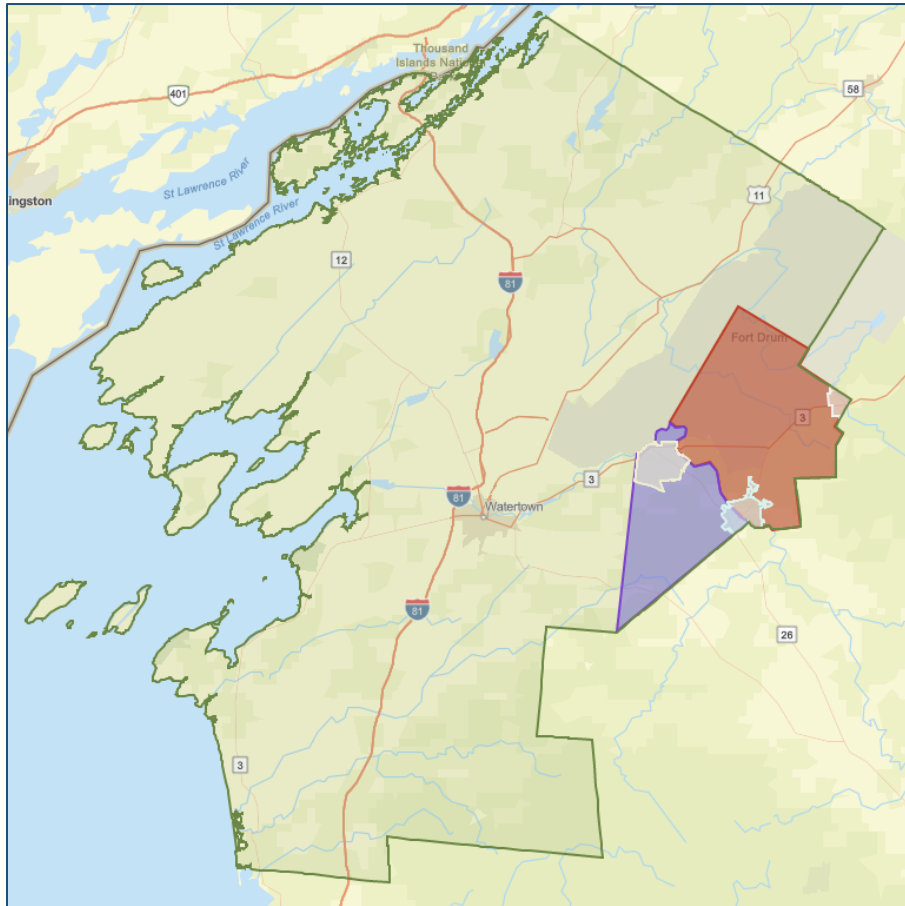
Data boundaries for the Town of Champion and Town of Wilna are approximated within Esri and EMSI, and as such the data likely include some areas outside of the town boundaries. In most instances, this approximation should not change the overall takeaways from the data.

When looking at areas with smaller populations, the demographic data estimates could be subject to sampling errors and thus have a larger margin of error than estimates from larger population areas. However, these figures are still helpful for identifying trends.

Some data is also influenced by activity at Fort Drum that is beyond the control of local government. For instance, major deployments or movement of brigades can result in shifting population and Government employment figures.

Market Area

The following sections on demographic, economic, and industry trends incorporate data covering the following geographies: (1) Town of Champion, (2) Town of Wilna, (3) Villages of Carthage and West Carthage, (4) Great Bend, (5) Natural Bridge, (6) Jefferson County, and (7) New York State.



Green = Jefferson County
 Red = Town of Wilna
 Purple = Town of Champion

Demographics

Overview

The table shown to the right is a comparison of demographic trends for the villages, hamlets, Jefferson County, and New York State.

- Decennial Census counts from 2010 and 2020 were used for the population data because counts are generally more accurate than estimates. These counts show an overall trend of declining population, with the exception of the Town of Champion and Jefferson County as a whole. These declines could be due in part to deployments and repositioning at Fort Drum. However, looking at estimates of civilian population indicate there are likely other factors at play as well.
- According to Esri estimates, Jefferson County's median age is 35, more than four years younger than the State median age. Only Natural Bridge has a median age above the State median, and also experienced the highest rate of increase in median age over the last 10 year. That being said, all of the geographies have seen aging of the population over the last 10 years, ranging from an increase of 1.7 years in Great Bend to an increase of 3.7 years in Natural Bridge.

Demographic Fundamentals

	Population			
	2010	2020	Change	% Change
Town of Champion	4,509	4,562	53	1.2%
Town of Wilna	6,427	5,732	(695)	-10.8%
Carthage/ West Carthage	5,759	5,016	(743)	-12.9%
Great Bend	843	807	(36)	-4.3%
Natural Bridge	365	296	(69)	-18.9%
Jefferson County	116,229	116,721	492	0.4%
New York	19,378,102	20,201,249	823,147	4.2%

Source: 2010 and 2020 Decennial Census

	Median Age			
	2010	2021	Change	% Change
Town of Champion	35.2	37.2	2.0	5.7%
Town of Wilna	33.1	35.0	1.9	5.7%
Carthage/ West Carthage	32.2	34.9	2.7	8.4%
Great Bend	35.9	37.6	1.7	4.7%
Natural Bridge	39.3	43.0	3.7	9.4%
Jefferson County	32.7	34.7	2.0	6.1%
New York	37.9	39.6	1.7	4.5%

Source: Esri

The table to the left shows projected demographic trends for the next five years:

- All geographies are expected to see a decline in population over the next five years, except for New York State. The Villages of Carthage and West Carthage are projected to see the fastest rate of decline at 5%, amounting to a loss of 243 residents. During the same timeframe, the hamlets of Great Bend and Natural Bridge are projected to see declines of 1.5% and 1.3% respectively. These declines amount to 13 and 5 residents total, less than the population gained over the last ten years.
- It is anticipated that the populations of all of the geographies will continue to age, but all except Natural Bridge will remain below the State median. Again, Natural Bridge is projected to see the fastest rate of aging.

Demographic Fundamentals (Projected)				
Population				
	2021	2026	Change	% Change
Town of Champion	4,402	4,257	(145)	-3.3%
Town of Wilna	6,043	5,802	(241)	-4.0%
Carthage/ West Carthage	4,893	4,650	(243)	-5.0%
Great Bend	895	882	(13)	-1.5%
Natural Bridge	383	378	(5)	-1.3%
Jefferson County	115,895	112,796	(3,099)	-2.7%
New York	19,625,500	19,678,859	53,359	0.3%
Median Age				
	2021	2026	Change	% Change
Town of Champion	37.2	38.0	0.8	2.2%
Town of Wilna	35.0	35.9	0.9	2.6%
Carthage/ West Carthage	34.9	35.6	0.7	2.0%
Great Bend	37.6	38.2	0.6	1.6%
Natural Bridge	43.0	44.5	1.5	3.5%
Jefferson County	34.7	35.6	0.9	2.6%
New York	39.6	40.6	1.0	2.5%

Source: Esri

Race Composition

The chart below shows the racial composition of the geographies. The data for Jefferson County and its component parts reflect substantially less racial diversity than the State as a whole. Jefferson County and its component geographies are all more than 84% white, with Natural Bridge having a racial composition that is 95% white.

Race Composition, 2021							
	Carthage/ West Carthage	Great Bend	Natural Bridge	Town of Champion	Town of Wilna	Jefferson County	New York
White Alone	87.0%	88.9%	95.0%	87.8%	87.6%	84.7%	62.7%
Black Alone	5.0%	3.4%	1.3%	4.7%	4.6%	6.8%	15.9%
Native American Alone	0.6%	0.6%	1.0%	0.5%	0.9%	0.6%	60.0%
Asian Alone	2.1%	1.7%	0.8%	1.9%	1.8%	1.7%	8.9%
Pacific Islander Alone	0.1%	1.0%	0.0%	0.0%	0.2%	0.3%	0.1%
Some Other Race Alone	2.0%	1.2%	0.3%	1.7%	1.8%	2.2%	8.2%
Two or More Races	3.8%	4.1%	1.6%	3.3%	3.1%	3.7%	3.7%
Hispanic Origin (Any Race)	8.3%	4.2%	2.6%	5.6%	6.2%	8.4%	19.7%
Diversity Index	38.3	31.3	14.2	30.8	31.9	38.8	70.9

Source: Esri

Projected Income Growth				
Median Household Income				
	2021	2026	Change	% Change
Town of Champion	\$52,783	\$53,430	\$647	1.2%
Town of Wilna	\$54,130	\$57,397	\$3,267	6.0%
Carthage/ West Carthage	\$50,250	\$51,812	\$1,562	3.1%
Great Bend	\$55,620	\$55,208	(\$412)	-0.7%
Natural Bridge	\$75,411	\$79,591	\$4,180	5.5%
Jefferson County	\$54,585	\$58,358	\$3,773	6.9%
New York	\$72,042	\$80,540	\$8,498	11.8%

Source: Esri

Projected Income Growth

The five-year projected growth in median household income is displayed in the table to the left. Although income is expected to grow in all geographies except Great Bend, it is expected to grow at a slower rate compared to the State. Great Bend is expected to see a decline in median household income of .7%, or \$412 annually. Natural Bridge has the highest median household income at \$75,411, higher than the County and State, and is expected to see a 5.5% increase in the next five years. The Villages of Carthage and West Carthage have the lowest median household income, and projected growth is only 3.1% over the next five years. As such, the Villages will continue to have the lowest income level among these geographies, and indicating that income gaps between the geographies will continue to grow.

Educational Attainment

Educational Attainment (age 25+), 2021							
	Carthage/ West Carthage	Great Bend	Natural Bridge	Town of Champion	Town of Wilna	Jefferson County	New York
Less than 9th Grade	1.9%	0.5%	1.8%	1.2%	1.5%	2.3%	5.7%
9th - 12th Grade, No Diploma	7.7%	7.6%	9.8%	10.2%	5.7%	5.9%	6.4%
High School Graduate	25.6%	36.1%	32.2%	26.2%	30.8%	27.8%	21.7%
GED/Alternative Credential	8.5%	1.5%	10.1%	3.9%	11.8%	6.6%	4.0%
Some College, No Degree	23.0%	18.6%	25.0%	22.7%	23.2%	21.0%	15.1%
Associate Degree	11.1%	14.7%	17.4%	12.4%	11.6%	12.7%	8.9%
Bachelor's Degree	14.0%	15.1%	3.6%	15.1%	10.6%	14.2%	21.6%
Graduate Professional Degree	8.1%	5.8%	0.0%	8.4%	4.7%	9.5%	16.9%

Source: Esri

The table above outlines the educational attainment of populations in the various geographies.

- Natural Bridge, which has the highest median household income, also has the lowest level of Bachelor’s and Graduate degrees and the highest level of Associate degrees. Natural Bridge also has the highest percentage of population without a high school diploma or equivalent and the second highest level of residents with just a high school diploma or equivalent (42.3%).
- The Town of Champion has the highest level of Bachelor’s and Graduate degrees and the second highest level of residents without a high school diploma or equivalent.
- The Villages of Carthage and West Carthage are the most closely aligned to overall educational trends in Jefferson County.

Access to Transportation

The chart below shows the breakdown of households with access to a vehicle, which is inconsistent across geographies. All households in Natural Bridge have access to at least one vehicle, but only 34% have access to 2 or more vehicles. In comparison, all of the other geographies have over 44% of households with 2 or more vehicles and most have over 55%. Meanwhile, in the Villages of Carthage/West Carthage over 13% of households do not have access to a vehicle.

Households by Vehicles Available, 2021							
	Carthage/ West Carthage	Great Bend	Natural Bridge	Town of Champion	Town of Wilna	Jefferson County	New York
No vehicle available	13.5%	3.7%	0.0%	10.2%	6.3%	9.1%	29.1%
1 vehicle available	42.0%	33.9%	65.9%	33.9%	36.9%	36.5%	32.7%
2 or more vehicles available	44.5%	62.4%	34.1%	55.9%	56.8%	54.4%	38.2%

Source: Esri

Housing Stock

The housing stock is considerably older in the Villages, Natural Bridge, and the Town of Wilna than the County as a whole or the State, each having between 44% and 48% of housing units built before 1939. Natural Bridge has had no new housing units built since 2000, and nearly 90% of the housing units were built prior to 1970. This is noteworthy because older housing is more likely to have toxic materials, such as lead and asbestos, and can be more vulnerable to severe weather events. The majority of housing units in Great Bend (59.6%) and the Town of Champion (54.4%) were built after 1970.

Housing Units by Year Build							
	Carthage/ West Carthage	Great Bend	Natural Bridge	Town of Champion	Town of Wilna	Jefferson County	New York
Total	2,410	394	123	1,982	2,672	59,969	8,322,722
Built since 2000	1.4%	16.5%	0.0%	15.3%	2.4%	15.5%	8.9%
Built 1970 to 1999	37.4%	43.1%	10.6%	39.1%	38.5%	34.5%	23.7%
Built 1940 tp 1969	13.8%	15.5%	43.9%	15.7%	14.8%	16.9%	35.3%
Built 1939 or earlier	47.4%	24.9%	45.5%	29.8%	44.3%	33.1%	32.1%

Source: Esri, US Census Bureau, 2015-2019 American Community Survey

The table below shows some general indicators around housing and households. The percentage of households renting in Jefferson County (29.9%) is substantially lower than in the State as a whole (41.5%), and the percentage of households renting in Natural Bridge is particularly low at 13.9%.

Rental rates throughout the geographies are slightly lower than the County-wide median, with the exception of Great Bend. Great Bend's median gross rent is \$1,770, even higher than the State median, because 89 of the 115 rental units have rental rates above \$1,000. Median Home Value of owner-occupied units range from \$76,600 in Natural Bridge to \$135,227 in the Town of Champion, well below the County median of \$149,900 and almost one-third of the State median of \$313,700.

The Housing Affordability Index looks at home values and income data to indicate the extent to which residents can afford to buy existing homes in an area. Values over 100 indicate a high level of affordability. Based on this index, all of the included geographies within Jefferson County show a high level of affordability. This may explain, in part, the relatively high level of home ownership in these areas.

Households and Housing, 2021

	Carthage/ West Carthage	Great Bend	Natural Bridge	Town of Champion	Town of Wilna	Jefferson County	New York
Households	1,990	344	149	1,740	2,298	43,936	7,482,516
Average Household Size	2.38	2.60	2.57	2.50	2.46	2.50	2.55
Housing Units	2,369	386	173	2,054	2,690	61,176	8,433,903
Owner Occupied Units	45.4%	63.7%	72.3%	55.7%	50.4%	41.9%	47.2%
Renter Occupied Units	38.6%	25.4%	13.9%	28.9%	35.0%	29.9%	41.5%
Median Home Value - owner occupied	\$115,980	\$128,400	\$76,600	\$135,227	\$116,148	\$149,900	\$313,700
Median Gross Rent*	\$877	\$1,770	unavailable	\$961	\$854	\$987	\$1,280
Housing Affordability Index	193	229	287	159	173	152	90

Source: Esri, *US Census Bureau, 2015-2019 American Community Survey

Industry Analysis

Industry Composition

The figure on the next page shows the industry sector composition of the Towns and Jefferson County in 2021. The largest industry sector in the County is **Government**, accounting for 26,625 jobs, or approximately 46.6% of total jobs. **Health Care and Social Assistance** is the second largest industry sector by employment with 6,538 employees. **Retail Trade** is the third largest, employing 6,060.

As noted previously, the Town boundaries are approximated and as such the industry data appears to be including some employment outside of the towns, including in other counties. The most obvious impact is in the Educational Services industry. For this reason, town level data will only be used in a high-level view and any additional analysis will focus on County level data. That aside, the Town of Champion appears to have employment concentrations in Retail Trade and Accommodation and Food Services, while the Town of Wilna has concentrations in Manufacturing and Health Care and Social Assistance.

Employment by Sector in 2021

NAICS & Description		Town of Champion		Town of Wilna		Jefferson County		
		2021 Jobs	Payrolled Business Locations	2021 Jobs	Payrolled Business Locations	2021 Jobs	Payrolled Business Locations	2021 Location Quotient
11	Agriculture, Forestry, Fishing and Hunting	4	2	2	1	926	52	1.29
21	Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	49	10	0.27
22	Utilities	0	0	14	4	162	9	0.83
23	Construction	16	6	12	4	1,907	275	0.57
31	Manufacturing	92	4	141	5	1,836	68	0.42
42	Wholesale Trade	17	4	18	4	932	82	0.45
44	Retail Trade	233	24	72	14	6,060	419	1.07
48	Transportation and Warehousing	4	2	23	4	1,185	79	0.49
51	Information	17	1	7	2	472	43	0.45
52	Finance and Insurance	11	2	66	7	825	95	0.34
53	Real Estate and Rental and Leasing	39	5	32	9	657	118	0.67
54	Professional, Scientific, and Technical Services	44	7	32	7	989	163	0.25
55	Management of Companies and Enterprises	0	0	0	0	366	16	0.45
56	Administrative/Support and Waste Mngmt. and Remediation Services	16	4	2	1	1,128	123	0.32
61	Educational Services*	352	6	153	3	374	23	0.25
62	Health Care and Social Assistance	105	12	527	17	6,538	283	0.88
71	Arts, Entertainment, and Recreation	0	0	4	1	498	72	0.59
72	Accommodation and Food Services	136	13	63	10	3,815	318	0.90
81	Other Services (except Public Administration)	32	13	81	26	1,765	278	0.60
90	Government	80	10	122	13	26,625	220	3.15
99	Unclassified Industry	2	2	4	3	52	95	0.76
Totals		1,200	117	1,375	135	57,161	2,839	

Towns Source: Esri

County Source: Emsi

*The Town data for Educational Services appears to be including jobs from another county.

Employment Trends

As shown in the table on the following page, from 2011 to 2021 Jefferson County had a net loss of jobs of 11.9%, or 7,696 jobs, compared to job growth of 2.7% for New York. However, 3,680 of those job losses are tied to the **Federal Government, Military** sector, indicating that they are likely the result of deployments or bigrade repositioning at Fort Drum. If not for those jobs, the overall net loss of jobs would have been closer to 6%.

For most industries, this trajectory was already underway through 2019, indicating that declines caused by the COVID-19 pandemic most likely exacerbated existing trends. This is particularly notable in the following industries: **Arts, Entertainment and Recreation, Accommodation and Food Services, Other Services, Manufacturing**, and to a lesser extent **Retail Trade**. There were, however, some notable reversals and changes in the years between 2019 and 2021.

- Reversal – decline to growth: **Real Estate and Rental and Leasing** was declining from 2011 to 2019, but added 80 jobs from 2019 to 2021. This resulted in overall growth of 8.4% from 2011 to 2021. **Transportation and Warehousing** lost 306 jobs from 2011 to 2019, but gained back 176 of those jobs from 2019 to 2021.
- Reversal – growth to decline: **Health Care and Social Assistance** was growing from 2011 to 2019, but lost 472 jobs from 2019 to 2021. There was still overall growth from 2011 to 2021, but less than if the growth trend had continued. **Wholesale Trade** added 51 jobs from 2011 to 2019, but then lost 68 jobs from 2019 to 2021.
- Accelerated growth: Growth in the **Agriculture, Forestry, Fishing, and Hunting** industry seemed to accelerate from 2019 to 2021, adding 94 jobs compared to just 21 jobs from 2011 to 2019.

In terms of job count, employment decline from 2011 to 2021 was primarily driven by **Government** and **Retail Trade**. These industries also lost jobs throughout the State. As noted above, the **Government** job losses in Jefferson County are primarily tied to the **Federal Government, Military** sector, indicating that they are likely the result of activities at Fort Drum.

Certain industries drastically underperformed from 2011 to 2021 compared to the State as a whole, including **Utilities, Transportation and Warehousing, Information**, and **Construction**. However, **Transportation and Warehousing** has seen a turnaround since 2019.

Conversely, the most jobs have been gained in **Healthcare and Social Assistance; Agriculture, Forestry, Fishing and Hunting; and Management of Companies and Enterprises**. Some industries in Jefferson County drastically overperformed from 2011 to 2021 compared to State, including **Unclassified Industry, Management of Companies and Enterprises**, and **Educational Services**.

Employment Change by Sector 2011 - 2021

NAICS & Description		Jefferson County							New York			
		2011 Jobs	2019 Jobs	2011-2019 # Change	2011-2019 % Change	2021 Jobs	2011-2021 # Change	2011-2021 % Change	2011 Jobs	2021 Jobs	# Change	% Change
62	Health Care and Social Assistance	6,339	7,010	672	10.6%	6,538	199	3.1%	1,401,396	1,661,674	260,278	18.6%
11	Agriculture, Forestry, Fishing and Hunting	811	832	21	2.6%	926	115	14.2%	42,997	45,915	2,918	6.8%
55	Management of Companies and Enterprises	257	368	112	43.5%	366	110	42.7%	132,987	131,812	(1,175)	(0.9%)
61	Educational Services	271	360	89	32.8%	374	103	38.0%	401,438	451,620	50,183	12.5%
54	Professional, Scientific, and Technical Services	926	971	46	4.9%	989	63	6.8%	664,667	765,491	100,824	15.2%
53	Real Estate and Rental and Leasing	606	578	(29)	(4.7%)	657	51	8.4%	204,244	216,831	12,587	6.2%
99	Unclassified Industry	21	34	13	63.7%	52	31	150.8%	28,361	46,085	17,723	62.5%
21	Mining, Quarrying, and Oil and Gas Extraction	61	56	(4)	(7.4%)	49	(11)	(18.4%)	4,817	4,857	40	0.8%
42	Wholesale Trade	949	999	51	5.3%	932	(17)	(1.8%)	340,783	301,499	(39,284)	(11.5%)
56	Administrative/Support and Waste Mngmt. and Remediation Services	1,161	1,126	(35)	(3.0%)	1,128	(33)	(2.8%)	466,677	499,096	32,419	6.9%
71	Arts, Entertainment, and Recreation	545	534	(11)	(2.0%)	498	(47)	(8.6%)	188,091	163,324	(24,767)	(13.2%)
22	Utilities	214	159	(55)	(25.5%)	162	(52)	(24.1%)	37,130	35,733	(1,397)	(3.8%)
52	Finance and Insurance	916	833	(82)	(9.0%)	825	(91)	(9.9%)	536,114	546,617	10,503	2.0%
48	Transportation and Warehousing	1,316	1,009	(306)	(23.3%)	1,185	(131)	(9.9%)	272,484	327,992	55,508	20.4%
51	Information	739	573	(166)	(22.5%)	472	(267)	(36.2%)	271,560	288,500	16,940	6.2%
72	Accommodation and Food Services	4,196	4,137	(60)	(1.4%)	3,815	(382)	(9.1%)	639,887	575,286	(64,601)	(10.1%)
23	Construction	2,299	1,981	(318)	(13.8%)	1,907	(393)	(17.1%)	400,557	454,185	53,628	13.4%
81	Other Services (except Public Administration)	2,217	2,032	(185)	(8.4%)	1,765	(452)	(20.4%)	532,064	500,574	(31,490)	(5.9%)
31	Manufacturing	2,388	2,054	(334)	(14.0%)	1,836	(553)	(23.1%)	470,771	416,179	(54,592)	(11.6%)
44	Retail Trade	7,069	6,285	(784)	(11.1%)	6,060	(1,008)	(14.3%)	940,089	863,786	(76,303)	(8.1%)
90	Government*	31,558	27,294	(4,264)	(13.5%)	26,625	(4,933)	(15.6%)	1,522,138	1,461,699	(60,439)	(4.0%)
Totals		64,857	59,227	(5,630)	(8.7%)	57,161	(7,696)	(11.9%)	9,499,253	9,758,756	259,503	2.7%

Source: Emsi

*3,680, or 74.6%, of the Government job losses between 2011 and 2021 are within the Federal Government, Military sector. These were likely tied to deployments and/or brigade repositioning at Fort Drum.

Projected Employment Trends

Over the next ten years, the County’s largest sector, **Government**, is projected to gain roughly 295 jobs. Fortunately, declining trends are projected to reverse in almost all industries in the next decade, with the exception of **Information, Construction, Manufacturing, and Retail Trade**. The highest number of anticipated jobs to be gained are in **Accommodation and Food Service, Health Care and Social Assistance**, and **Administrative, Support, Waste Management and Remediation Services**. The highest growth rates are expected in **Administrative, Support, Waste Management and Remediation Services** and **Transportation and Warehousing**. Overall, Jefferson County is expected to see job growth of 5.7% over the next ten years, similar to the projected New York State growth of 6.7%.

Projected Employment Growth by Sector through 2031

NAICS & Description		Jefferson County				New York			
		2021 Jobs	2031 Jobs	# Change	% Change	2021 Jobs	2031 Jobs	# Change	% Change
72	Accommodation and Food Services	3,815	4,944	1,130	29.6%	575,286	581,512	6,226	1.1%
62	Health Care and Social Assistance	6,538	7,279	741	11.3%	1,661,674	1,998,672	336,998	20.3%
56	Administrative and Support and Waste Management and Remediation Services	1,128	1,748	620	55.0%	499,096	526,100	27,004	5.4%
48	Transportation and Warehousing	1,185	1,641	456	38.5%	327,992	371,659	43,667	13.3%
90	Government	26,625	26,920	295	1.1%	1,461,699	1,576,175	114,476	7.8%
53	Real Estate and Rental and Leasing	657	810	153	23.2%	216,831	218,064	1,233	0.6%
11	Agriculture, Forestry, Fishing and Hunting	926	1,067	141	15.2%	45,915	49,911	3,996	8.7%
71	Arts, Entertainment, and Recreation	498	628	130	26.0%	163,324	171,332	8,008	4.9%
54	Professional, Scientific, and Technical Services	989	1,112	124	12.5%	765,491	840,550	75,059	9.8%
81	Other Services (except Public Administration)	1,765	1,880	116	6.6%	500,574	515,365	14,791	3.0%
61	Educational Services	374	467	93	24.8%	451,620	519,036	67,416	14.9%
42	Wholesale Trade	932	975	43	4.6%	301,499	275,173	(26,327)	(8.7%)
55	Management of Companies and Enterprises	366	400	34	9.3%	131,812	122,440	(9,372)	(7.1%)
22	Utilities	162	187	24	14.9%	35,733	36,787	1,055	3.0%
21	Mining, Quarrying, and Oil and Gas Extraction	49	65	15	30.7%	4,857	6,159	1,302	26.8%
99	Unclassified Industry	52	61	9	17.4%	46,085	66,918	20,834	45.2%
52	Finance and Insurance	825	829	4	0.5%	546,617	561,452	14,835	2.7%
51	Information	472	391	(81)	(17.2%)	288,500	340,633	52,133	18.1%
23	Construction	1,907	1,788	(119)	(6.2%)	454,185	450,537	(3,648)	(0.8%)
31	Manufacturing	1,836	1,681	(155)	(8.4%)	416,179	409,699	(6,480)	(1.6%)
44	Retail Trade	6,060	5,548	(513)	(8.5%)	863,786	775,313	(88,473)	(10.2%)
Totals		57,161	60,420	3,259	5.7%	9,758,756	10,413,485	654,730	6.7%

Source: Emsi

Location Quotient Analysis

A location quotient (LQ) analysis compares the concentration of a regional industry to the concentration of the same industry across the country. By comparing regional employment patterns to that of the country as a whole, we can identify industries with high local concentration that may represent specialization and competitive advantages of Jefferson County. Note that we generally consider LQ values above 1.20 or below 0.80 as "significant."

The table to the right contains the results of the LQ analysis for Jefferson County at the 4-digit NAICS code level. Industries within the Government sector (NAICS 90) were removed to show specifically private sector industries with a competitive advantage based on concentration. Industries with fewer than 10 jobs were also removed.

Jefferson County has a high concentration of jobs across various manufacturing industries, and the highest concentration of jobs in the **Railroad Rolling Stock Manufacturing** industry. The **Animal Production** industry, supplemented by **Support Activities for Animal Production**, is also notable as these sectors are highly concentrated and together are substantial employers.

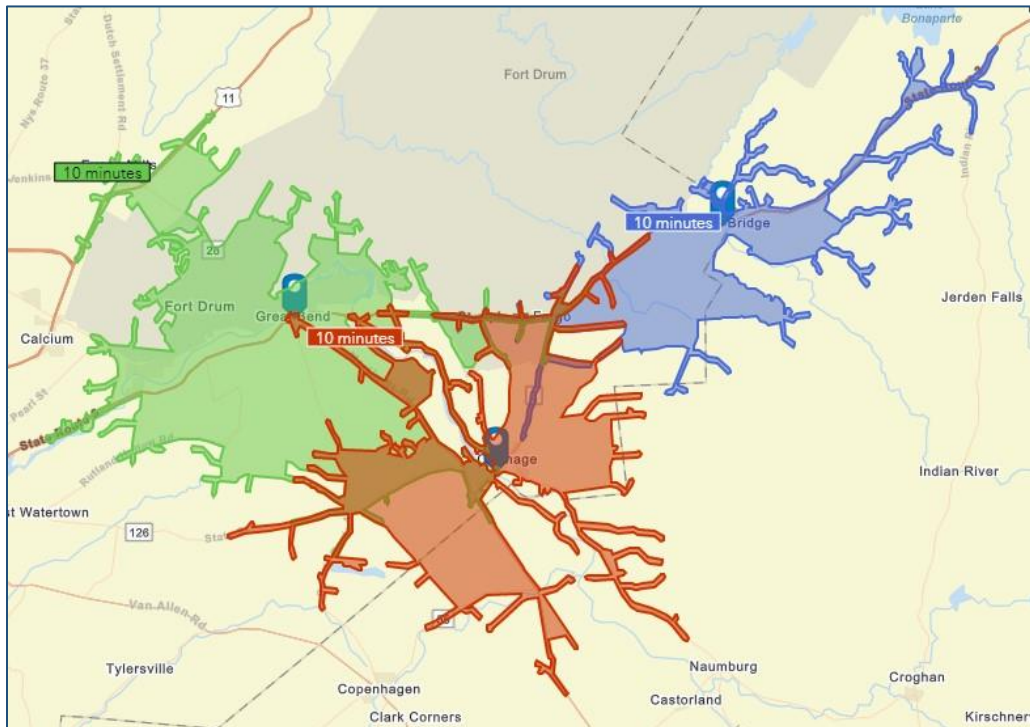
All of the top thirty (30) 4-digit industries by LQ are considered highly concentrated, producing far more goods and services than are required by local demand, making them important export-led economic drivers.

Top 30 Industries by Concentration, Jefferson County				
NAICS	Industry	2021 Jobs	2021 % of Total Jobs	2021 LQ
3365	Railroad Rolling Stock Manufacturing	173	0.30%	24.85
3221	Pulp, Paper, and Paperboard Mills	182	0.32%	5.66
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	200	0.35%	4.79
1120	Animal Production	670	1.17%	3.72
3115	Dairy Product Manufacturing	189	0.33%	3.44
4854	School and Employee Bus Transportation	209	0.37%	3.43
1152	Support Activities for Animal Production	52	0.09%	3.26
8134	Civic and Social Organizations	286	0.50%	2.95
3353	Electrical Equipment Manufacturing	140	0.24%	2.87
5323	General Rental Centers	26	0.05%	2.38
4543	Direct Selling Establishments	154	0.27%	2.24
5619	Other Support Services	235	0.41%	2.21
3111	Animal Food Manufacturing	50	0.09%	2.05
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	451	0.79%	2.05
6243	Vocational Rehabilitation Services	191	0.33%	1.93
3241	Petroleum and Coal Products Manufacturing	66	0.12%	1.76
4453	Beer, Wine, and Liquor Stores	109	0.19%	1.73
4412	Other Motor Vehicle Dealers	102	0.18%	1.68
6219	Other Ambulatory Health Care Services	201	0.35%	1.61
7212	RV (Recreational Vehicle) Parks and Recreational Camps	37	0.07%	1.57
5111	Newspaper, Periodical, Book, and Directory Publishers	139	0.24%	1.44
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,066	1.87%	1.43
4411	Automobile Dealers	622	1.09%	1.38
4246	Chemical and Allied Products Merchant Wholesalers	72	0.13%	1.38
4441	Building Material and Supplies Dealers	608	1.06%	1.36
6231	Nursing Care Facilities (Skilled Nursing Facilities)	671	1.17%	1.35
3121	Beverage Manufacturing	133	0.23%	1.32
6114	Business Schools and Computer and Management Training	34	0.06%	1.29
4442	Lawn and Garden Equipment and Supplies Stores	85	0.15%	1.28
2123	Nonmetallic Mineral Mining and Quarrying	41	0.07%	1.20

Source: Emsi

Retail Market Analysis

A retail gap analysis identifies specific retail categories where residents are spending more on a particular good than the total amount of sales of that good that are occurring within a specified region. In other words, retail 'leakages' exist where residents are meeting their needs for these products and services by traveling outside the region to make their purchases. By creating new businesses or expanding existing businesses in retail categories with a sales leakage, a portion of these leakages and economic activity can be recaptured in the region. However, it is worth noting that the retail gap analysis data is from 2017, and as such does not account for the effects of the COVID 19 pandemic. The circumstances of the pandemic likely impacted consumer habits, and it is reasonable to expect that leakage may have increased due to retail closures or increased online shopping since 2020.



This analysis was conducted three times using local retail areas representing a 10-minute driving distance from each of the targeted geographies: the Villages of Carthage and West Carthage, Natural Bridge, and Great Bend. A 10-minute driving distance was selected as it minimizes overlap in retail areas for these target geographies, however it is important to note that there is still some overlap and thus the three areas service each other to some extent. This is demonstrated in the map to the left. It is also worth noting that this analysis is limited for Natural Bridge in particular, where locally it is known that the retail demand is driven by tourists and travelers more so than the residents of the local retail area.

For the Villages and Great Bend, the level of retail leakages is used to calculate the number of new businesses that the target areas could support if 25% of the leakage is recaptured. This is done by comparing the potential recapture amount to the average sales for similar businesses

in Jefferson County. This was not done for Natural Bridge due to the low levels of local demand in the retail area.

Villages of Carthage & West Carthage

The table to the right displays the retail marketplace profile for the Villages. Retail categories show a retail leakage where local demand exceeds local supply.

The following retail categories exhibit retail leakages:

- Furniture & Home Furnishings Stores
- Electronics & Appliance Stores
- Bldg Material & Supplies Dealers
- Specialty Food Stores
- Beer, Wine & Liquor Stores
- Health & Personal Care Stores
- Clothing, Shoes, and Accessories Stores
- Book, Periodical & Music Stores
- General Merchandise Stores
- Office Supplies, Stationery & Gift Stores
- Used Merchandise Stores
- Food Service & Drinking Places

Sales Surplus & Leakage, Carthage/West Carthage (10 minute drive)					
NAICS	2017 Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	# of Businesses
441	Motor Vehicle & Parts Dealers	\$15,850,385	\$26,674,196	(\$10,823,811)	8
4411	Automobile Dealers	\$13,407,224	\$20,013,018	(\$6,605,794)	2
4412	Other Motor Vehicle Dealers	\$1,201,326	\$3,611,455	(\$2,410,129)	3
4413	Auto Parts, Accessories & Tire Stores	\$1,241,835	\$3,049,723	(\$1,807,888)	4
442	Furniture & Home Furnishings Stores	\$2,698,556	\$0	\$2,698,556	0
4421	Furniture Stores	\$1,406,082	\$0	\$1,406,082	0
4422	Home Furnishings Stores	\$1,292,475	\$0	\$1,292,475	0
443	Electronics & Appliance Stores	\$2,788,698	\$955,317	\$1,833,381	2
444	Bldg Materials, Garden Equip. & Supply Stores	\$4,600,366	\$2,280,385	\$2,319,981	2
4441	Bldg Material & Supplies Dealers	\$4,216,378	\$1,880,904	\$2,335,474	1
4442	Lawn & Garden Equip & Supply Stores	\$383,988	\$399,481	(\$15,493)	1
445	Food & Beverage Stores	\$13,443,336	\$32,099,168	(\$18,655,832)	7
4451	Grocery Stores	\$11,493,992	\$31,091,183	(\$19,597,191)	5
4452	Specialty Food Stores	\$895,049	\$191,557	\$703,492	1
4453	Beer, Wine & Liquor Stores	\$1,054,294	\$816,428	\$237,866	1
446	Health & Personal Care Stores	\$6,531,287	\$4,405,743	\$2,125,544	2
447	Gasoline Stations	\$7,904,253	\$11,908,040	(\$4,003,787)	3
448	Clothing & Clothing Accessories Stores	\$6,028,525	\$0	\$6,028,525	0
4481	Clothing Stores	\$4,294,050	\$0	\$4,294,050	0
4482	Shoe Stores	\$705,819	\$0	\$705,819	0
4483	Jewelry, Luggage & Leather Goods Stores	\$1,028,655	\$0	\$1,028,655	0
451	Sporting Goods, Hobby, Book & Music Stores	\$2,174,006	\$0	\$2,174,006	0
4511	Sporting Goods/Hobby/Musical Instr Stores	\$1,825,020	\$0	\$1,825,020	0
4512	Book, Periodical & Music Stores	\$348,985	\$0	\$348,985	0
452	General Merchandise Stores	\$9,025,226	\$1,444,857	\$7,580,369	2
4521	Department Stores Excluding Leased Depts.	\$5,541,442	\$0	\$5,541,442	0
4529	Other General Merchandise Stores	\$3,483,783	\$1,444,857	\$2,038,926	2
453	Miscellaneous Store Retailers	\$2,887,144	\$1,621,007	\$1,266,137	4
4531	Florists	\$237,085	\$512,094	(\$275,009)	1
4532	Office Supplies, Stationery & Gift Stores	\$865,039	\$316,223	\$548,816	2
4533	Used Merchandise Stores	\$358,862	\$0	\$358,862	0
722	Food Services & Drinking Places	\$8,078,821	\$6,860,288	\$1,218,533	17
7223	Special Food Services	\$358,031	\$0	\$358,031	0
7224	Drinking Places - Alcoholic Beverages	\$461,619	\$89,844	\$371,775	1
7225	Restaurants/Other Eating Places	\$7,259,171	\$6,770,444	\$488,727	16

Source: ESRI

The table below displays the extent of additional supportable retail in the Villages if we assume a 25% recapture of existing retail leakage. At this recapture rate, the opportunity for new supportable businesses is limited. The most viable opportunity is **Special Food Services**, but there could also be an opportunity for a Clothing Store if shoe and accessory products are also included.

Retail Gap Analysis, Carthage/West Carthage (10 minute drive)					
NAICS	2017 Industry Group	Retail Gap	25% Recapture	Average Sales per Business	Supportable Business Count
4421	Furniture Stores	\$1,406,082	\$351,521	\$1,248,053	0.28
4422	Home Furnishings Stores	\$1,292,475	\$323,119	\$692,502	0.47
443	Electronics & Appliance Stores	\$1,833,381	\$458,345	\$2,536,969	0.18
4441	Bldg Material & Supplies Dealers	\$2,335,474	\$583,869	\$2,727,270	0.21
4452	Specialty Food Stores	\$703,492	\$175,873	\$1,595,979	0.11
4453	Beer, Wine & Liquor Stores	\$237,866	\$59,467	\$859,326	0.07
446	Health & Personal Care Stores	\$2,125,544	\$531,386	\$1,592,829	0.33
4481	Clothing Stores	\$4,294,050	\$1,073,513	\$1,521,228	0.71
4482	Shoe Stores	\$705,819	\$176,455	\$1,294,532	0.14
4483	Jewelry, Luggage & Leather Goods Stores	\$1,028,655	\$257,164	\$1,181,295	0.22
4511	Sporting Goods/Hobby/Musical Instr Stores	\$1,825,020	\$456,255	\$1,771,004	0.26
4512	Book, Periodical & Music Stores	\$348,985	\$87,246	\$183,710	0.47
4521	Department Stores Excluding Leased Depts.	\$5,541,442	\$1,385,361	\$13,620,085	0.10
4529	Other General Merchandise Stores	\$2,038,926	\$509,732	\$7,319,596	0.07
4532	Office Supplies, Stationery & Gift Stores	\$548,816	\$137,204	\$2,296,202	0.06
4533	Used Merchandise Stores	\$358,862	\$89,716	\$361,470	0.25
7223	Special Food Services	\$358,031	\$89,508	\$84,010	1.07
7224	Drinking Places - Alcoholic Beverages	\$371,775	\$92,944	\$181,461	0.51
7225	Restaurants/Other Eating Places	\$488,727	\$122,182	\$681,727	0.18
Total		\$27,843,422	\$6,960,856		5.68

Source: ESRI. MRB Group

Great Bend

The table to the right displays the retail marketplace profile for Great Bend. Retail categories show a retail leakage where local demand exceeds local supply.

The following retail categories exhibit retail leakages:

- Furniture & Home Furnishings Stores
- Electronics & Appliance Stores
- Lawn & Garden Equipment & Supply Stores
- Specialty Food Stores
- Beer, Wine & Liquor Stores
- Health & Personal Care Stores
- Clothing, Shoes, and Accessories Stores
- Sporting Goods, Hobby, Book & Music Stores
- Book, Periodical & Music Stores
- Florists
- Office Supplies, Stationery & Gift Stores
- Used Merchandise Stores
- Special Food Services
- Drinking Places – Alcoholic Beverages

Sales Surplus & Leakage, Great Bend (10 minute drive)					
NAICS	2017 Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	# of Businesses
441	Motor Vehicle & Parts Dealers	\$22,269,231	\$35,050,634	(\$12,781,403)	8
4411	Automobile Dealers	\$18,891,044	\$29,297,523	(\$10,406,479)	3
4412	Other Motor Vehicle Dealers	\$1,687,608	\$2,069,155	(\$381,547)	2
4413	Auto Parts, Accessories & Tire Stores	\$1,690,579	\$3,683,956	(\$1,993,377)	3
442	Furniture & Home Furnishings Stores	\$3,768,463	\$0	\$3,768,463	0
4421	Furniture Stores	\$1,973,672	\$0	\$1,973,672	0
4422	Home Furnishings Stores	\$1,794,791	\$0	\$1,794,791	0
443	Electronics & Appliance Stores	\$3,821,379	\$466,867	\$3,354,512	1
444	Bldg Materials, Garden Equip. & Supply Stores	\$6,421,852	\$7,621,278	(\$1,199,426)	3
4441	Bldg Material & Supplies Dealers	\$5,903,635	\$7,393,445	(\$1,489,810)	2
4442	Lawn & Garden Equip & Supply Stores	\$518,217	\$227,833	\$290,384	1
445	Food & Beverage Stores	\$18,255,839	\$29,117,161	(\$10,861,322)	7
4451	Grocery Stores	\$15,614,205	\$28,204,743	(\$12,590,538)	5
4452	Specialty Food Stores	\$1,214,087	\$215,874	\$998,213	1
4453	Beer, Wine & Liquor Stores	\$1,427,546	\$696,544	\$731,002	1
446	Health & Personal Care Stores	\$8,788,314	\$1,281,096	\$7,507,218	2
447	Gasoline Stations	\$10,941,233	\$9,398,946	\$1,542,287	2
448	Clothing & Clothing Accessories Stores	\$8,345,909	\$347,824	\$7,998,085	2
4481	Clothing Stores	\$5,954,534	\$267,861	\$5,686,673	1
4482	Shoe Stores	\$994,987	\$0	\$994,987	0
4483	Jewelry, Luggage & Leather Goods Stores	\$1,396,387	\$0	\$1,396,387	0
451	Sporting Goods, Hobby, Book & Music Stores	\$3,020,520	\$1,945,348	\$1,075,172	2
4511	Sporting Goods/Hobby/Musical Instr Stores	\$2,545,313	\$1,945,348	\$599,965	2
4512	Book, Periodical & Music Stores	\$475,207	\$0	\$475,207	0
452	General Merchandise Stores	\$12,424,337	\$18,778,234	(\$6,353,897)	5
4521	Department Stores Excluding Leased Depts.	\$7,655,071	\$15,275,716	(\$7,620,645)	2
4529	Other General Merchandise Stores	\$4,769,265	\$3,502,519	\$1,266,746	3
453	Miscellaneous Store Retailers	\$3,939,189	\$774,103	\$3,165,086	2
4531	Florists	\$319,182	\$0	\$319,182	0
4532	Office Supplies, Stationery & Gift Stores	\$1,189,244	\$0	\$1,189,244	0
4533	Used Merchandise Stores	\$497,948	\$382,693	\$115,255	1
722	Food Services & Drinking Places	\$11,304,763	\$12,862,374	(\$1,557,611)	23
7223	Special Food Services	\$501,559	\$0	\$501,559	0
7224	Drinking Places - Alcoholic Beverages	\$633,506	\$138,509	\$494,997	1
7225	Restaurants/Other Eating Places	\$10,169,698	\$12,723,865	(\$2,554,167)	22

Source: ESRI

The table below displays the extent of additional supportable retail in Great Bend if we assume a 25% recapture of existing retail leakage. At this recapture rate, the most viable opportunities for additional businesses are **Special Food Services** and **Health & Personal Care Stores**, but again there could also be an opportunity for a Clothing Store if shoe and accessory products are also included.

Retail Gap Analysis, Great Bend (10 minute drive)					
NAICS	2017 Industry Group	Retail Gap	25% Recapture	Average Sales per Business	Supportable Business Count
4421	Furniture Stores	\$1,973,672	\$493,418	\$1,248,053	0.40
4422	Home Furnishings Stores	\$1,794,791	\$448,698	\$692,502	0.65
443	Electronics & Appliance Stores	\$3,354,512	\$838,628	\$2,536,969	0.33
4442	Lawn & Garden Equip & Supply Stores	\$290,384	\$72,596	\$524,118	0.14
4452	Specialty Food Stores	\$998,213	\$249,553	\$1,595,979	0.16
4453	Beer, Wine & Liquor Stores	\$731,002	\$182,751	\$859,326	0.21
446	Health & Personal Care Stores	\$7,507,218	\$1,876,805	\$1,592,829	1.18
447	Gasoline Stations	\$1,542,287	\$385,572	\$3,278,156	0.12
4481	Clothing Stores	\$5,686,673	\$1,421,668	\$1,521,228	0.93
4482	Shoe Stores	\$994,987	\$248,747	\$1,294,532	0.19
4483	Jewelry, Luggage & Leather Goods Stores	\$1,396,387	\$349,097	\$1,181,295	0.30
4511	Sporting Goods/Hobby/Musical Instr Stores	\$599,965	\$149,991	\$1,771,004	0.08
4512	Book, Periodical & Music Stores	\$475,207	\$118,802	\$183,710	0.65
4529	Other General Merchandise Stores	\$1,266,746	\$316,687	\$7,319,596	0.04
4531	Florists	\$319,182	\$79,796	\$480,288	0.17
4532	Office Supplies, Stationery & Gift Stores	\$1,189,244	\$297,311	\$2,296,202	0.13
4533	Used Merchandise Stores	\$115,255	\$28,814	\$361,470	0.08
7223	Special Food Services	\$501,559	\$125,390	\$84,010	1.49
7224	Drinking Places - Alcoholic Beverages	\$494,997	\$123,749	\$181,461	0.68
Total		\$31,232,281	\$7,808,070		7.92

Source: ESRI. MRB Group

Natural Bridge

The table to the right displays the retail marketplace profile for Natural Bridge. Unlike the other target areas, many of the retail categories have no supply in the Natural Bridge area, inherently creating a retail gap. That being said, local demand in these categories is also relatively low and would not likely support additional businesses alone. As noted earlier, much of the retail demand in Natural Bridge is driven by tourists and travelers and as such any retail strategy should focus on external demand instead.

Sales Surplus & Leakage, Natural Brige (10 minute drive)					
NAICS	2017 Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	# of Businesses
441	Motor Vehicle & Parts Dealers	\$2,150,045	\$0	\$2,150,045	0
4411	Automobile Dealers	\$1,814,944	\$0	\$1,814,944	0
4412	Other Motor Vehicle Dealers	\$178,119	\$0	\$178,119	0
4413	Auto Parts, Accessories & Tire Stores	\$156,982	\$0	\$156,982	0
442	Furniture & Home Furnishings Stores	\$325,007	\$0	\$325,007	0
4421	Furniture Stores	\$162,357	\$0	\$162,357	0
4422	Home Furnishings Stores	\$162,649	\$0	\$162,649	0
443	Electronics & Appliance Stores	\$328,759	\$0	\$328,759	0
444	Bldg Materials, Garden Equip. & Supply Stores	\$678,403	\$118,727	\$559,676	1
4441	Bldg Material & Supplies Dealers	\$613,987	\$0	\$613,987	0
4442	Lawn & Garden Equip & Supply Stores	\$64,416	\$118,727	(\$54,311)	1
445	Food & Beverage Stores	\$1,672,987	\$0	\$1,672,987	0
4451	Grocery Stores	\$1,439,784	\$0	\$1,439,784	0
4452	Specialty Food Stores	\$110,916	\$0	\$110,916	0
4453	Beer, Wine & Liquor Stores	\$122,287	\$0	\$122,287	0
446	Health & Personal Care Stores	\$862,081	\$0	\$862,081	0
447	Gasoline Stations	\$1,021,807	\$0	\$1,021,807	0
448	Clothing & Clothing Accessories Stores	\$686,559	\$0	\$686,559	0
4481	Clothing Stores	\$495,432	\$0	\$495,432	0
4482	Shoe Stores	\$81,205	\$0	\$81,205	0
4483	Jewelry, Luggage & Leather Goods Stores	\$109,922	\$0	\$109,922	0
451	Sporting Goods, Hobby, Book & Music Stores	\$260,713	\$354,087	(\$93,374)	1
4511	Sporting Goods/Hobby/Musical Instr Stores	\$220,106	\$354,087	(\$133,981)	1
4512	Book, Periodical & Music Stores	\$40,607	\$0	\$40,607	0
452	General Merchandise Stores	\$1,112,411	\$0	\$1,112,411	0
4521	Department Stores Excluding Leased Depts.	\$672,396	\$0	\$672,396	0
4529	Other General Merchandise Stores	\$440,015	\$0	\$440,015	0
453	Miscellaneous Store Retailers	\$381,797	\$0	\$381,797	0
4531	Florists	\$34,539	\$0	\$34,539	0
4532	Office Supplies, Stationery & Gift Stores	\$105,747	\$0	\$105,747	0
4533	Used Merchandise Stores	\$39,922	\$0	\$39,922	0
722	Food Services & Drinking Places	\$948,863	\$398,131	\$550,732	3
7223	Special Food Services	\$45,357	\$0	\$45,357	0
7224	Drinking Places - Alcoholic Beverages	\$51,066	\$0	\$51,066	0
7225	Restaurants/Other Eating Places	\$852,441	\$355,786	\$496,655	2

Source: ESRI

Entertainment Gap Analysis

The Retail Leakage Analysis above excludes entertainment related spending. However, developing entertainment and recreation was identified by community stakeholders as a need. To explore this identified gap in the market, MRB Group employed a multi-step model to estimate the need for entertainment businesses.

- 1) First, data from the U.S. Bureau of Labor Statistics' Consumer Expenditure Survey² was used to estimate potential spending on entertainment in the zip code 13619, which encompasses the Villages, Great Bend, and substantial portions of the Towns, based on the current number of households in the zip code.
- 2) Second, Emsi was used to estimate the existing spending on entertainment in the zip code. The analysis specifically looked at industry sectors that rely on ticket sales or admissions.
- 3) Finally, these figures were compared to confirm the market gap for entertainment and recreation business development.³

Estimated Household Spending on Entertainment

Nationally, households in non-urban areas spend \$4,366 annually on entertainment. When broken down, much of that spending is captured in the retail analysis, such as expenditures on audio/visual equipment, pets, toys, and hobbies. The remainder, \$621 annually on average, is spent on fees and admissions (e.g. concerts, movies, museums, etc.). This component of entertainment spending is the focus of this analysis.

Average Expenditure Data, Communities Outside Urban Areas

Income before Taxes	\$86,487
People per Consumer Unit	2.4
Average Annual Expenditure	\$68,233
Total Entertainment Expenditure	\$4,366
Fees and Admissions	\$621
Audio and visual equipment and services	\$1,105
Pets, Toys, Hobbies, and Playground Equipment	\$1,213
Other Entertainment Supplies, Equipment, and Services	\$1,426

Source: Table 2400. Population size of area of residence: Average annual expenditures and characteristics, Consumer Expenditure Surveys, 2021.

² Source: Table 2400. Population size of area of residence: Average annual expenditures and characteristics, Consumer Expenditure Surveys, 2021.

³ Categories of spending in the Consumer Expenditure Survey are not industry specific, so do not provide a direct comparison to individual entertainment industries.

The Carthage area (zip code 13619) has an average household income that is 81% of the national average for non-urban areas. The table to the right shows Carthage area demographics for comparison, and applies this percentage to estimated entertainment spending and estimated spending on fees and admissions. At this level of spending, the Carthage area’s 4,174 households are likely to spend approximately \$2,091,128⁴ annually on entertainment fees and admissions.

Carthage Area* Demographics and Entertainment Expenditures

Average Household Income	\$69,773
% of national area income before taxes	81%
Average Household Size	2.43
Number of Households	4,174
Estimated Entertainment Spending	\$14,701,875
Estimated Spending on Fees and Admissions	\$2,091,128

Source: Esri, MRB Group

*Zip code 13619

Entertainment Leakage Analysis

The table below shows total demand and in-region purchases for a selection of entertainment sectors that are primarily reliant on ticket sales and admissions⁵. According to Emsi’s modeling data, residents of the Carthage area demanded approximately \$7.1 million of goods and services from these industries in 2021. Nearly all of that demand (99%) was met by businesses located outside of the area. Given a 25% recapture of this demand in just the Carthage area, one business in the **Other Amusement and Recreation Industries** sector could be supported. This sector consists of businesses such as golf courses, skiing facilities, fitness and recreational sports centers, bowling alleys, etc. If the Carthage area is able to capture additional demand from residents and nearby communities, that would help to support additional business development.

⁴ Actual demand may vary from this estimated figure.

⁵ This grouping may not capture all spending on entertainment fees and admissions.

Entertainment Sales Surplus & Leakage, Carthage Area (zip code 13619)

NAICS	Industry Group	Demand (Total Purchases)	Supply (In-area Purchases)	Gap	25% Recapture	Average Sales per Business*	Supportable Business Count
7111	Performing Arts Companies	\$368,539	\$0	\$368,539	\$92,135	\$551,981	0.17
7112	Spectator Sports	\$663,925	\$0	\$663,925	\$165,981	\$671,092	0.25
7113	Promoters of Performing Arts, Sports, and Similar Events	\$363,660	\$0	\$363,660	\$90,915	\$612,594	0.15
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	\$210,324	\$0	\$210,324	\$52,581	\$0	-
7115	Independent Artists, Writers, and Performers	\$1,509,559	\$52,802	\$1,456,757	\$364,189	\$789,364	0.46
7121	Museums, Historical Sites, and Similar Institutions	\$357,402	\$0	\$357,402	\$89,351	\$767,679	0.12
7131	Amusement Parks and Arcades	\$385,315	\$0	\$385,315	\$96,329	\$844,725	0.11
7132	Gambling Industries	\$557,870	\$0	\$557,870	\$139,468	\$0	-
7139	Other Amusement and Recreation Industries	\$2,679,143	\$0	\$2,679,143	\$669,786	\$594,753	1.13

Source: Emsi, MRB Group

*Average Sales per Business is based on the total sales and number of payrolled business locations for each industry within the North Country Regional Economic Development Council region (Essex, Franklin, Hamilton, Jefferson, Lewis, and St. Lawrence counties). There are no payrolled business locations in the region for 7114 or 7132.

Real Estate Market Analysis

The following market analysis uses CoStar data on industrial, office, and retail real estate trends in the Villages of Carthage and West Carthage, Great Bend, and Natural Bridge.

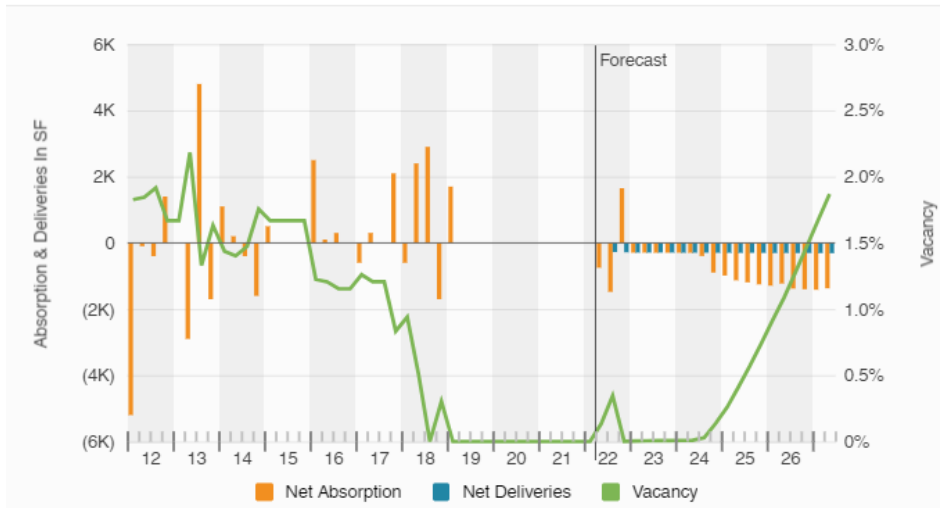
Industrial

CoStar only has data on industrial real estate for the Villages of Carthage and West Carthage. Within that CoStar data, the Villages have approximately 564,000 square feet of industrial space. There have been no deliveries to the market in the last ten years, and no vacancy since Q1 of 2019. Overall, vacated industrial space has been quickly reabsorbed, indicating demand for the limited supply of industrial space.

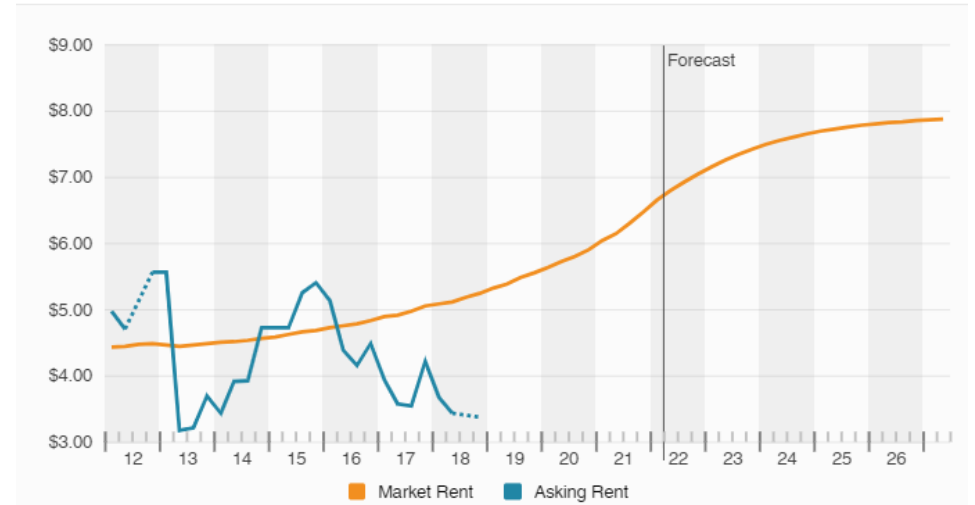
Market rent has been growing consistently over the last ten years, and is currently about \$6.75 per sq ft. Rents are projected to continue to grow for another two years before starting to even out.

Industrial Real Estate Trends: Villages of Carthage & West Carthage

Net Absorption, Net Deliveries & Vacancy



Market Rent & Asking Rent Per SF



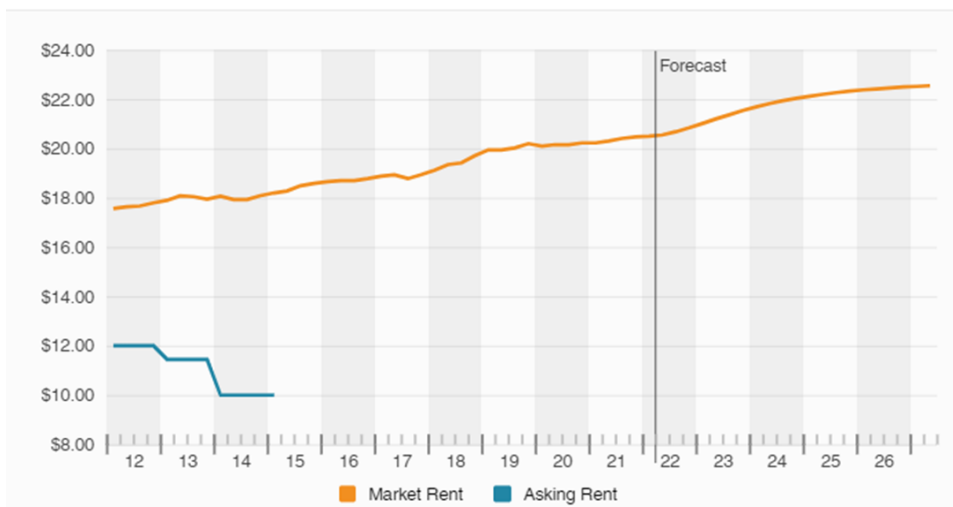
Office

Both the Villages and Great Bend have a stock of Office Space in CoStar. Within the CoStar database, the Villages have approximately 103,000 sq ft and Great Bend has approximately 2,300 sq ft of space. Neither area has had any deliveries of new space in the last ten years. Great Bend has had 0% vacancy during this time, and the Villages have been fully occupied since 2014 when there was a significant absorption of about 1,400 sq ft. The consistent lack of availability indicates that these areas could likely absorb additional office space.

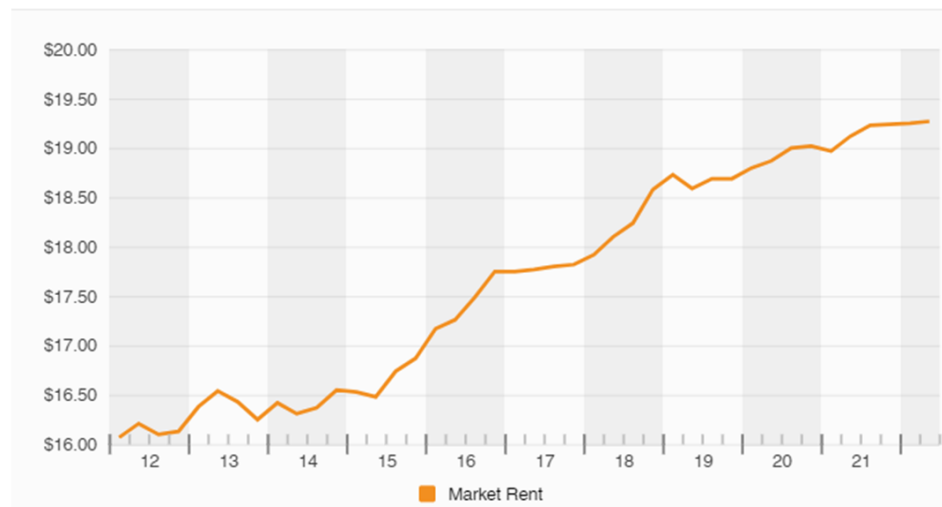
Market rent over the last ten years has grown steadily in both areas. In the Villages, rents have increased from under \$18 per sq ft in 2012 to over \$20.50 currently. In Great Bend, rents have increased from about \$16 per sq ft in 2012 to almost \$19.30 currently.

Office Rent Rate Trends: Villages and Great Bend

Market Rent & Asking Rent Per SF - Villages



Market Rent & Asking Rent Per SF - Great Bend



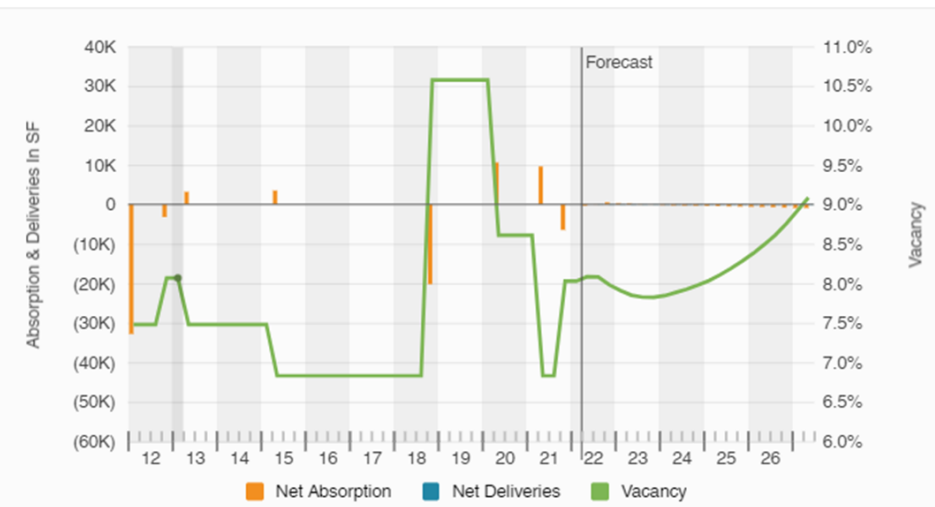
Retail

All three areas have retail space reported in CoStar, with 539,000 sq ft in the Villages, 17,400 sq ft in Great Bend, and 11,000 sq ft in Natural Bridge. There have been no deliveries of new retail space in any of these areas. Great Bend and Natural Bridge have both had 0% vacancy for the last ten years. This indicates either a few long-term retailers, and/or a shortage in the supply of retail space in these areas. In the Villages, there were two major instances of retail space being vacated in 2012 (30,000 sq ft) and 2018 (20,000 sq ft). There were also two large absorptions of retail space, about 10,000 sq ft each, in 2020 and 2021. The vacancy rate in the Villages has ranged from just under 7% to over 10.5% during the last ten years, and is currently 8%. This indicates relatively weaker demand for retail space in the Villages than in the other areas.

Rental rates in the Villages have increased steadily, but slowly, over the last ten years from about \$11 per sq ft in 2012 to \$11.98 per sq ft currently. Rental rates in Great Bend and Natural Bridge have been similar and more volatile over the last ten years, and are currently \$13.26 per sq ft.

Retail Real Estate Trends: Villages and Great Bend

Net Absorption, Net Deliveries & Vacancy - Villages



Market Rent & Asking Rent Per SF - Great Bend





Wilna & Champion Community Survey

Wilna, Champion, West Carthage, and Carthage are all partnering to develop an Economic Resiliency and Recovery Plan with assistance from MRB Group. While this plan will focus primarily on the villages, we are interested in understanding what is impacting residents' quality of life throughout the towns, as well as initiatives and improvements that would better our community. Thank you for taking a few minutes to help with this effort.



* Required Appendix B: Stakeholder Engagement Overview

Where do you currently reside? *

Prepared by:



October 2022

Introduction

The Village of West Carthage, along with its partners the Village of Carthage, Town of Wilna, and Town of Champion, engaged MRB Group to develop an Economic Resiliency and Recovery Plan. These partners were seeking a community-driven economic development action plan, along with complementary strategies for infrastructure and streetscape improvements, to generate revitalization momentum and business continuity in the wake of the pandemic-induced recession, and make the area more resilient to future economic shocks. It is important that any such strategy is rooted in the needs and desires of the broader community, as well as the true capability and capacity of partners. The project team included various forms of stakeholder engagement to ensure that this strategy was mindful and inclusive of true community needs. This included two surveys and a public workshop. These efforts are summarized on the following pages.

Surveys

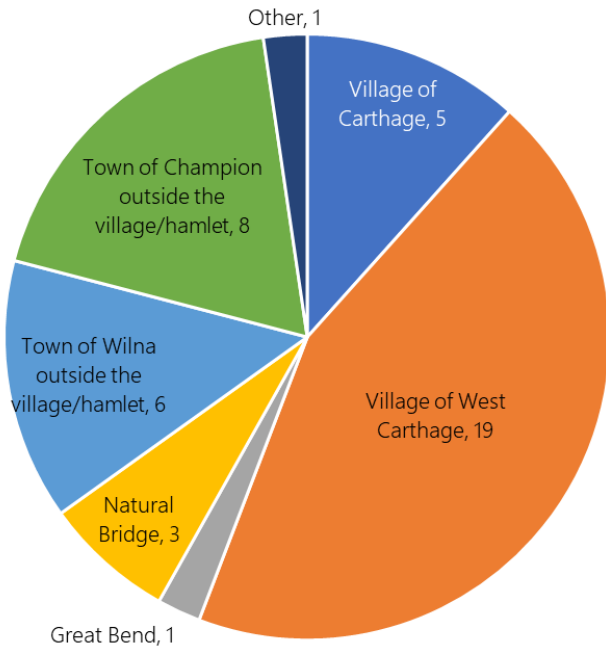
Two online surveys were developed and distributed throughout the community. The first survey was focused on residents of the villages and towns, and received 45 responses. The second survey was focused on businesses, but only received three responses.

Community Survey

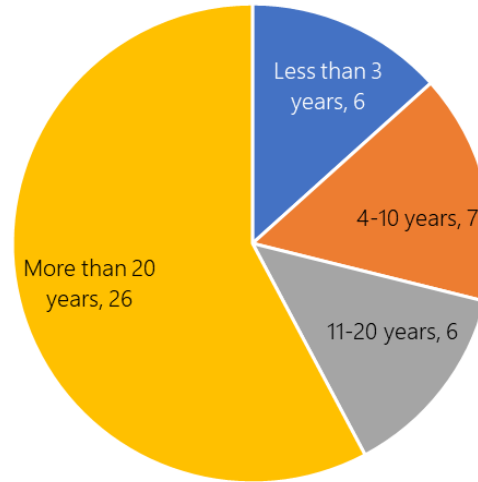
The community survey included 10 questions, plus 5 supplemental questions about childcare and youth activities for residents indicating an interest or need in this area. Forty-five responses were received. While the detailed results are outlined below, some key themes included a desire for more recreational opportunities, restaurants, and retail. Furthermore, inflation and high cost of living were indicated as critical factors impacting the most respondents.

The first 4 questions were intended to collect demographic information, and provided the following information about the residents completing the survey:

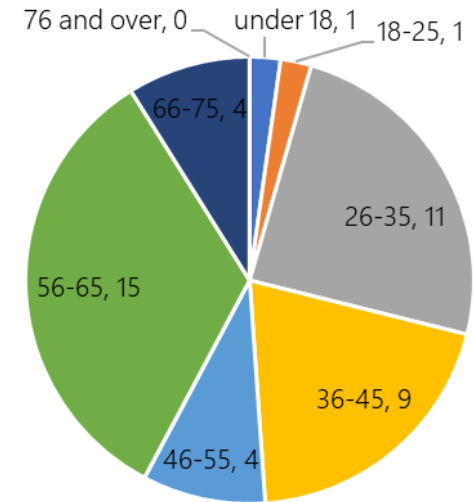
1) Survey respondents reside in:



2) Survey respondents have lived in the Wilna/Champion area for:



3) Survey respondents are aged:



4) 80% of survey respondents own their homes, and 20% rent.

Respondents were then asked a series of questions related to the impacts of the pandemic and quality of life.

- 1) Which of the following critical issues negatively impact your quality of life? (select all that apply)
 - a. Inflation/cost of living increases – 32 (71.1%)
 - b. Availability of recreational resources/opportunities – 18 (40%)
 - c. Access to new employment opportunities – 15 (33.3%)
 - d. Access to/affordability of high-speed internet – 14 (31.1%)
 - e. Housing affordability – (9 (20%))
 - f. Impacts of new development (e.g. reduced green space, traffic, noise, etc.) – 7 (15.6%)

- g. Access to childcare – 6 (13.3%)
 - h. Quality of transportation infrastructure – 6 (13.3%)
 - i. Access to eldercare – 5 (11.1%)
 - j. Food insecurity – 5 (11.1%)
 - k. None of the above – 4 (8.9%)
 - l. Access to addiction treatment and recovery services – 3 (6.7%)
 - m. Other – one each
 - i. High property taxes
 - ii. Limited healthcare
 - iii. Pleasant night inn tenants
 - iv. Improvement of housing rehab
 - v. Recreational vehicle traffic
 - vi. Public transportation
- 2) What impacts of the pandemic are still affecting your daily life? (select all that apply)
- a. Inflation – 35 (79.5%)
 - b. Reduced access to goods and services – 15 (34.1%)
 - c. Impacts on business/business closures – 9 (20.5%)
 - d. Impacts on schools and childcare – 7 (15.9%)
 - e. None of the above – 7 (15.9%)
 - f. Health Impacts (physical) – 4 (9.1%)
 - g. Health Impacts (mental/emotional) - 4 (9.1%)
 - h. Comment – Universal free breakfast and lunch should be offered in schools.
- 3) Think about the village/hamlet you live in or visit most. What would make the village/hamlet more vibrant? This was an open-ended question for residents to respond in their own words. Some common responses included:
- a. Business development (retail, restaurants, bars, breweries, etc.) - 17
 - b. More recreation (river access, parks, trails, dog park, social activities, events, etc.) – 13
 - c. Aesthetic enhancement (green spaces, street trees, flowers, decorations, cleanliness, color, etc.) - 6
 - d. Building/housing exterior enhancements (façade improvements, curb appeal, etc.) – 2
 - e. Others –

- i. Sidewalk repairs
 - ii. Give back to residents
 - iii. Improve infrastructure
 - iv. Lower tax costs
 - v. Consider what the next generation of residents will want/need
- 4) What is the next easiest thing to accomplish in your community that would improve your quality of life? This was an open-ended question for residents to respond in their own words. Some common responses included:
 - a. Recreation, including year-round activities, more community events, youth activities, recreation center, cultural attractions/activities, swimming pool, dog park (x10)
 - b. Business development, including grocery store options, a store at Fargo Corners, etc. (x4)
 - c. Infrastructure, including water, broadband, public transportation (x3)
 - d. Lower cost of living and tax burden (x3)
 - e. More 25 MPH Speed Limit Signs in the Village
 - f. Create law to limit drone and model airplane use over private property
 - g. Sidewalks cleared of snow in the winter, including in residential areas
 - h. Community garden
 - i. Volunteer
 - j. Better funded library
 - k. Community garden
 - l. Better upkeep of community spaces and resources.
- 5) What types of businesses would you like to see in your local area? This was an open-ended question for residents to respond in their own words. Responses included:
 - a. Restaurants/Bars/Food Service – 21
 - b. Chain/Large Retail (including department stores) - 8
 - c. General Retail - 5
 - d. Clothing Stores – 5
 - e. Thrift Stores – 3
 - f. Grocery/Food Stores – 3
 - g. Kid/Family oriented - 3

- h. Entertainment businesses – 2
- i. Gym/Recreation – 2
- j. Other –
 - i. Furniture store
 - ii. Boutiques
 - iii. Hotel

Respondents were then given the option to answer an additional five question regarding childcare and youth activity needs. Six agreed to answer these additional questions. These six respondents had children in the following age ranges:

- 0-18 months (2 children)
- 19 months-2.5 years (1 child)
- 2.5-5 years (2 children)
- 6-9 years (3 children)
- Planning to have/adopt children in the next 3 years (1 respondent)

These respondents were also asked about existing childcare, childcare needs, and youth activity needs.

- 1) What type of childcare do/would you need?
 - a. Full time – 4
 - b. Part time – 1
 - c. Before/After school only – 1
- 2) What type of childcare do you currently utilize?
 - a. In home childcare provider – paid – 2
 - b. Childcare center – 3
 - c. Relative or friend providing care – no charge – 2
- 3) What type of paid childcare would you prefer if new options were to become available?
 - a. In home childcare provider – 0
 - b. Childcare center – 3
 - c. Childcare programming within established organizations (e.g. schools, recreation centers, camps, etc.) – 3
- 4) Do you feel there is a need for additional local activities for school-age children? If so, please list suggested activities.

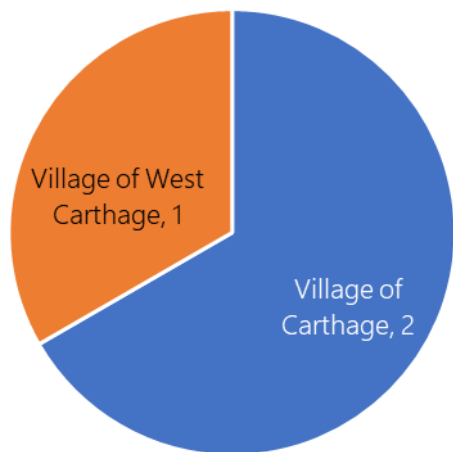
- a. Year-round recreation/youth activity center – 4
- b. Sports leagues – 1
- c. Arts programs – 2
- d. Free/low cost options (outside of school clubs) during normal business hours – 1
- e. After school care – 1
- f. Clean public swimming – 1
- g. Updated playground – 1
- h. Dances – 1
- i. Movies – 1

Business Survey

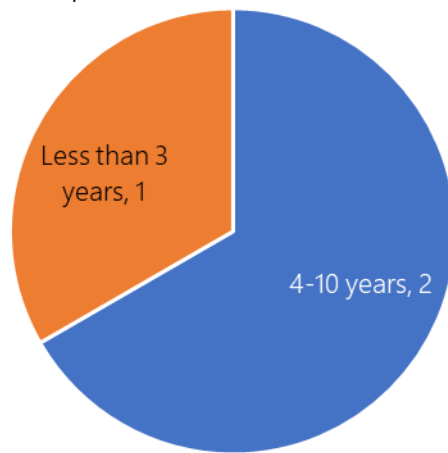
The business survey included 10 questions, plus 3 supplemental questions about workforce development needs. Only three businesses completed this survey. Due to the low response rate, it is not possible to generalize any themes for businesses.

The first 3 questions were intended to collect demographic information, and provided the following information about the residents completing the survey:

1) Survey respondents are located in:



2) Survey respondents have been in operation for:



3) These three businesses are in the personal services, construction/contractor, and food service sectors.

Respondents were then asked a series of questions related to the impacts of the pandemic on their business operation.

- 1) Which of the following critical issues negatively impact your business? (select all that apply)
 - a. Workforce skillsets/experience - 3
 - b. Workforce availability – 2
 - c. Inflation/cost of living increases – 1
 - d. Access to/affordability of high-speed internet – 1
 - e. Access to childcare/eldercare for employees – 1
 - f. Transportation and logistics – 1
 - g. Shifting consumer/customer habits – 1
 - h. Substance use/abuse affecting the workplace – 1
 - i. Supply chain disruptions – 1
 - j. None of the above – 0
- 2) What aspects of the surrounding community positively impact your business? This was an open-ended question, with responses as follows:
 - a. Advertising
 - b. Lack of competition
 - c. Support of local people and their pride in the community
- 3) What would a more vibrant community look like for your business? This was an open-ended question, with responses as follows:
 - a. Pride in business curb appeal
 - b. Like minded wellness facilities
 - c. More engaged population that is willing to pay for an experience
- 4) What types of businesses would compliment your business in the local area? This was an open-ended question, with responses as follows:
 - a. Brewery
 - b. Hotel/motel
 - c. Public transport
 - d. Health and wellness businesses
- 5) What is the next easiest thing to accomplish in the community that would improve the environment for your business? This was an open-ended question for residents to respond in their own words. Some common responses included:

- a. Riverside “boardwalk”
 - b. More docks
 - c. Recreation along the river
 - d. Commercial renting of purchasing options
- 6) Do you require, offer, or encourage any educational or certificate programming for your incumbent, new, and/or prospective employees?
- a. No – 2
 - b. Yes – 1

Only the 1 business answering yes to question 6 responded to the workforce development questions. As such, the results for those questions are not included here.

Opportunities & Challenges Workshop

On September 27, 2022, the study team held a public workshop to gather input from residents and community leaders. This workshop included two components: interactive boards and a facilitated discussion of community opportunities and challenges.

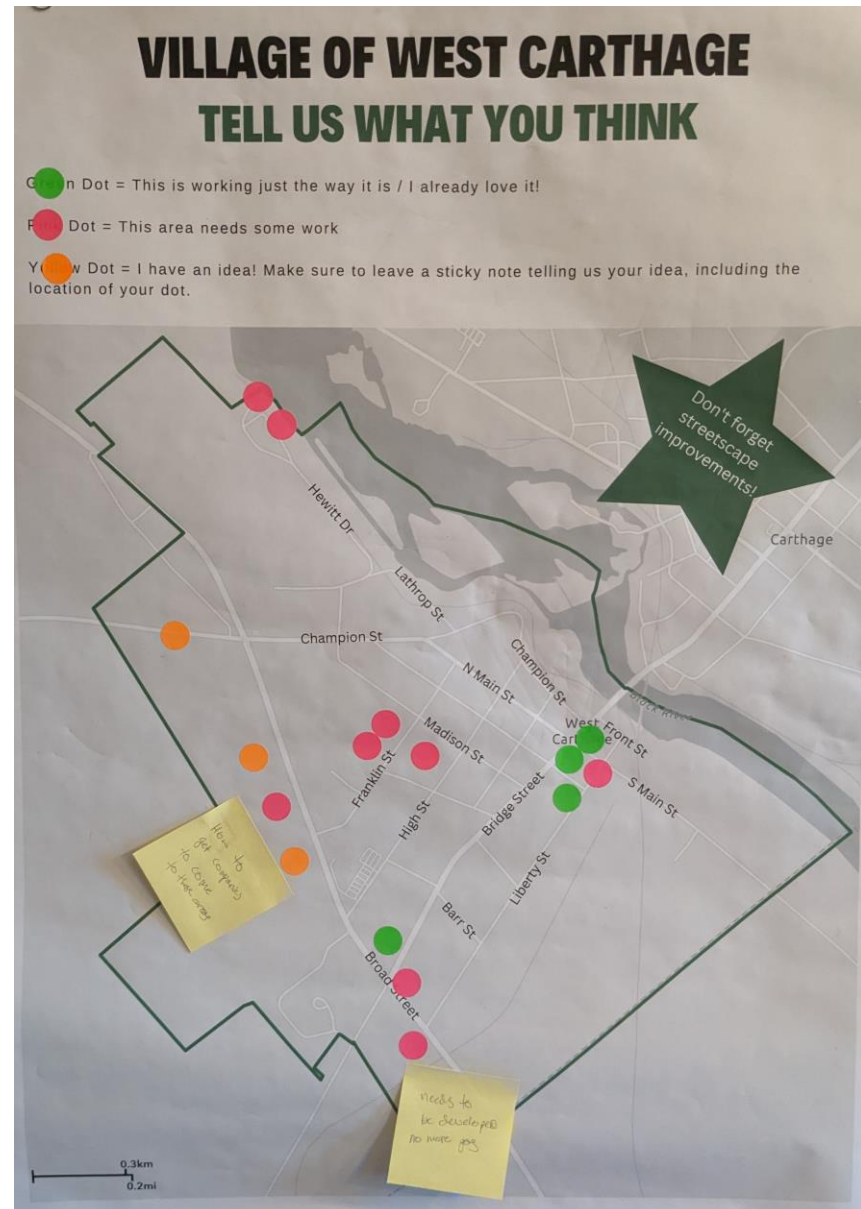
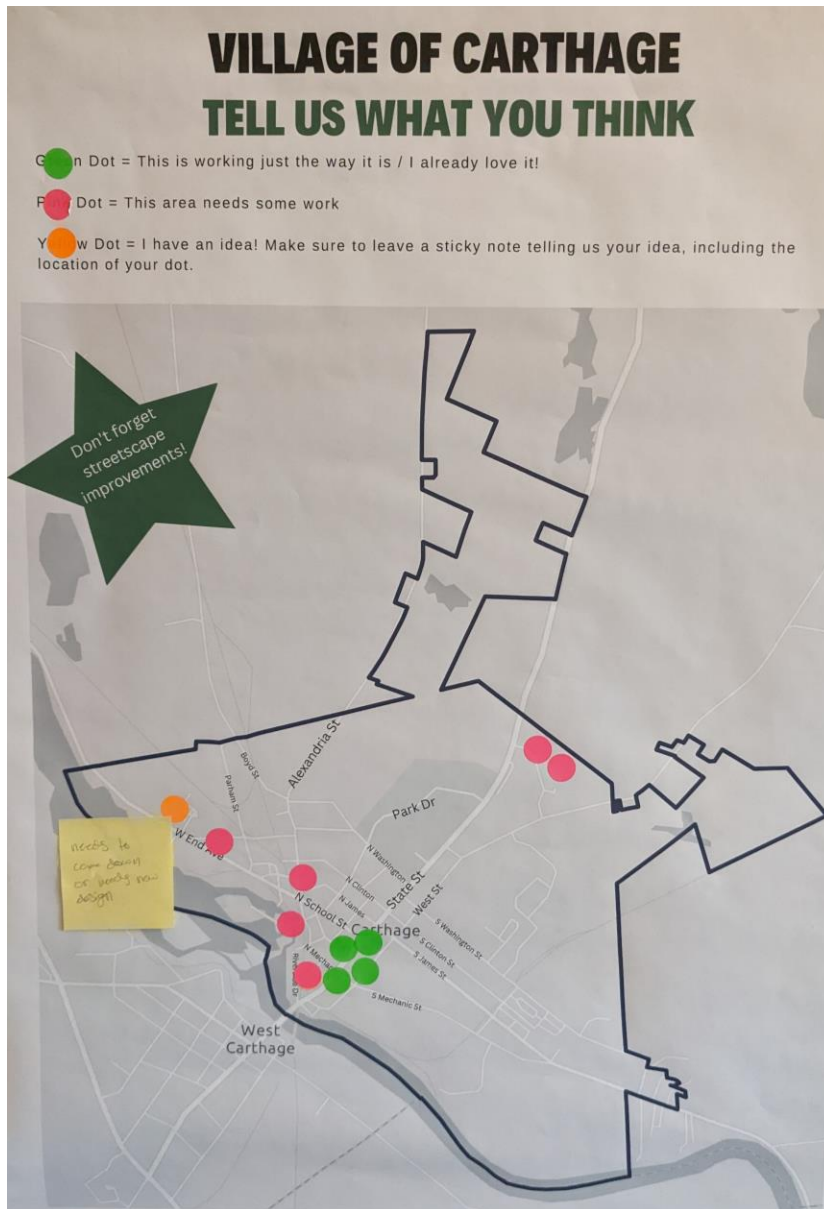
Interactive Boards

Workshop participants were asked to indicate their opinions on four separate boards using green, pink and orange dot stickers.

Two of the boards were maps: one of the Village of Carthage and one of the Village of West Carthage. For these boards, the dot colors correspond to: green indicating good aspects, pink indicating areas that need improvement, and orange indicating that they have an idea for the area. Photos of the resulting boards are shown on the next page.

In the Village of Carthage, participants indicated that they appreciated the look and feel of the downtown area. They also identified areas for development or improvements, mostly directly west of downtown and along the north eastern border of the village.

In the Village of West Carthage, participants also indicated appreciation for areas in the downtown core. To the west of downtown, participants noted some parcels that need updating or redevelopment, including a field on Madison St associated with a vacant school and a park on Franklin St. They also noted a large tract of land on the west side of Broad St that is currently available for sale, noting that this would be a good are for larger commercial development.



The other two boards outlined community needs and assets that were identified by reviewing the survey responses to date and past community plans and documents. Respondents were asked to place dots next to items as follows: green indicating agreement, and pink indicating disagreement. No participants place dots on the assets board, but many engaged with the needs board. Generally, participants disagreed that the community needs new/upgraded housing or more parking, but agreed that there was a need for more recreational opportunities. Other items had split opinions. This board is shown to the right.



Opportunities & Challenges Discussion

A variety of community leaders, including elected officials, relevant municipal staff, and planning/zoning board members. MRB Group facilitated a conversation with this group to: 1) confirm and expand upon community strengths and weaknesses; 2) identify critical challenges that are creating barriers to progress; and 3) identify opportunities for the community to become more vibrant, resilient, and successful.

There was general agreement with the listings compiled from prior discussions and plans, as shown on the next page.

Strengths

- Black River / natural resources
- Rural character – open spaces
- Fort Drum
- Collaboration (River Area Council of Governments)
- Historic resources
- Water and wastewater infrastructure in villages
- Quality of life – small town feel

Weaknesses

- Vacant/underutilized commercial properties
- Blighted homes
- Parking limitations
- Broadband access
- Limited recreational resources
- Attracting/retaining young families & professionals
 - Lack of family-friendly activities/resources
 - Limited childcare resources
- Few businesses, limiting retail/dining options and employment opportunities
- Fear of change

Divergent Perspectives

- Housing affordability & property taxes
- Remote, but centrally located

Opportunities

- Recreation expansion- boardwalk, bike trail, park improvements, rail bikes, public access fishing, etc.
- Tourism- leverage river, more accommodations/attractions, snowmobile groups, etc.
- Small business development – retail & restaurants
- Waterfront development
- Compact area can accommodate multi-modal transportation
- Developable/Reusable parcels
 - Hospital relocation will make multiple sites available – planning in advance will ensure desired outcomes

Challenges

- Unplanned development – threat to community character and natural resources
- Declining/aging populations
- Downsizing at Fort Drum would have large impacts
- Economy is driven by federal institutions
- Insufficient transportation systems
- Residential turnover and vacancy
- Absence of momentum for commercial development

The majority of the rest of the conversation focused on business development and attraction, specifically the question of what barriers there are to attracting and developing new business.

- Strengths:
 - Utilities infrastructure is built out and available in the villages.
- Weaknesses:
 - Lack of foot traffic downtown – difficult to attract and retain retail.
 - Zoning is old and outdated, and includes parking requirements that are restrictive for business development downtown.
- Challenges:
 - Hospital relocation could further reduce foot traffic downtown, and eliminate the reason for some people to go downtown.
- Opportunities:
 - Available and developable land, particularly in Champion along Route 26.
 - Redevelopment opportunities in West Carthage.
 - Local power generation (hydro and co-gen) – can this be leveraged to attract business with low cost power?
 - Incentivize businesses to locate/relocate to State and Bridge Streets – Geographically consolidating successful community businesses into the downtown areas could build momentum and create a draw.
 - Hospital relocation could free up key sites for redevelopment.
 - Fort Drum workforce pipeline – know and leverage the skillsets of retiring soldiers to attract businesses requiring those skills.
 - Leverage remote work trend to attract residents (especially those who have lived in the area previously and moved away), and thus demand for goods and services.


The conversation also included the following comments:

- Strength: There is very little traffic or congestion, so commuting is easy.
- Opportunity: The villages are well suited to creating opportunities for a more active, less car-centric lifestyle. Focus on development that meets these goals (e.g. diverse housing options, recreation, youth activities, etc.).
- Opportunity: With the hospital moving, there is an opportunity to start over at the old fire site (now the professional building). This would be an ideal spot for a recreation center or hockey arena. It would be great to use this site for something that is more in line with the community character and addresses the community need for recreation and youth/family activities.

- Weakness: The MSA designation in the villages and Wilna limits some funding opportunities.
- Weakness/Challenge: Current zoning and downtown design standards does not protect the character of the community, which has led to some less than ideal developments.

Legend

 Streetscape Character Area

 Streetscape Improvements



Appendix C: Streetscape Assessment

Improvement Type

- 01 - Sidewalk
- 02 - Bike Lane
- 03 - Pedestrian Signals

Prepared by:

MRB | *group*

December 2022

Introduction

This section describes the existing land uses and roadway conditions of Bridge Street (NY 126) from N. Broad Street (NY 26) in Carthage to James Street in West Carthage. An assessment of the existing conditions helps identify opportunities for the corridor including safety, pedestrian and bicycle connectivity, placemaking, aesthetics, and parking, all of which contribute to the versatility of the corridor and its vibrancy and business vitality.

Character Areas

The character of Bridge Street changes heading east from Broad Street. Growth and development along the corridor are the densest in Carthage and dissipate eastward along the corridor. This is evident in four character areas of the Bridge/State Street corridor:

- Broad Street (NY 26) to Potter Street
- Potter Street to Jefferson Street
- Jefferson Street to the Black River Bridge (Downtown West Carthage)
- Black River Bridge to James Street (Downtown Carthage)

Broad Street (NY 26) to Potter Street

The section of Bridge Street is characterized by chain businesses (Walgreens, Dunkin Donuts, Circle K, McDonald's, Northern Credit Union) and restaurants with parking in the front and large building setbacks along the north side. The south side of Bridge Street contains a few local businesses and a restaurant building setbacks closer to the street. Opportunities for improvement along this segment and at the intersection include:

- Filling a sidewalk gap between Broad Street and Potter Street along the south side;
- Filling a sidewalk gap between Broad Street and Circle K along the north side; and
- Installing pedestrian signals and crosswalks at the Broad Street intersection. Currently, there is only one pedestrian signal crossing Broad Street south of Bridge Street.



Bridge Street is approximately 33 feet from curb to curb and includes two 11-foot lanes and a seven-foot lane on the south side and a three to four-foot lane on the north. There are no bicycle facilities in this segment.

Potter Street to Jefferson Street



This segment of Bridge street is characterized as residential and is connected by sidewalks along both sides of the street. The sidewalks appear to be in mostly good condition and include pedestrian ramps, signage, and crosswalks at each intersection. Opportunities for improvement along this segment include constructing a sidewalk from Potter Street to approximately 210-foot sidewalk north of Potter Street to the existing sidewalk.

Like the previous segment, Bridge Street is approximately 33 feet from curb to curb and includes two 11-foot lanes and a seven-foot lane on the south side, and a three to four-foot lane on the north. There are no bicycle facilities in this segment.

Jefferson Street to the Black River Bridge (Downtown West Carthage)

This segment is located in downtown West Carthage and is characterized by its sidewalks and bricked right-of-ways between the sidewalk and street. Similar to the residential segment, this segment has continuous sidewalks in good condition and includes pedestrian ramps, signage, and crosswalks at each intersection. Land uses include a mix of office, retail, commercial, and detached single-family homes.

Bridge Street in downtown West Carthage is approximately 33 feet from curb to curb and includes two 11-foot lanes and wide shoulders that allow for on-street parking between Jefferson Street and Champion Drive. There are no bicycle facilities in this segment.

Black River Bridge to James Street (Downtown Carthage)

This segment, which turns into State Street, transitions quickly from the bridge into a downtown urban center. The west end of State Street near the bridge has a restaurant and a few small businesses. There is also a sidewalk that leads to a gazebo that is an overlook point to the river. State Street in this area is also bisected by two abandoned rail lines. The remainder of downtown Carthage is characterized by its aesthetics (e.g. building facades, decorative lighting, and street trees), wide sidewalks, density, and open space. This segment includes a variety of uses such as single- and multi-family living, retail, offices, restaurants, and public and institutional buildings. On-street parking is allowed on State Street as well as the surrounding side streets. Only a few businesses in this area have storefront parking.

This segment has continuous sidewalks in good condition and includes pedestrian ramps, signage, and crosswalks at each intersection. There are two mid-block crossings between Canal and Mechanic Streets to provide pedestrian access between the north and south side of the street. State Street in downtown Carthage varies between 48 and 50 feet and narrows down to approximately 40 feet near the bridge. State Street for the most part contains 11-foot lanes divided by a 10-foot two-way left-turn lane (TWLTL). There are approximately 89 on-street parking stalls that vary between seven and eight feet wide. There are no bicycle facilities in this segment.

Improvements Toolbox

There are a number of potential tools that can be used to have a positive role in pedestrian behavior and create enhance the quality of place and strengthen the area's status as a destination for residents, visitors, and businesses along the corridor. The following tools are nationally accepted standards that provide ways to achieve accessibility and safety as it relates to the implementation of a Complete Street. This toolbox prescribes high-level planning recommendations and what elements are most acceptable for the corridor. As with all planning considerations, these items should be vetted with state and local design standards and policies. Locations of the proposed improvements described below are shown in the maps following this narrative.

Sidewalks

The sidewalks appear to be in mostly good condition and include pedestrian ramps, signage, and crosswalks at each intersection. Consider enhancing the pedestrian experience by connecting existing sidewalk "gaps" at the west end of Bridge Street.

Bike lanes

Bike lanes provide another separate mode of transportation in addition to sidewalks. Where shoulder width is available, consider designating the shoulders of Bridge street between Broad Street and Jefferson Street as a bike lane.

Curb Extensions

Extending the curb at intersections visually and physically narrows the roadway. Curb extensions are used to calm traffic speeds and create shorter and safer crossings for pedestrians. Curb extensions that align with on-street parking increase the overall visibility of the pedestrian. Curb extensions are also a great place for street furniture and landscaping and can be used at mid-block crossings as well. Temporary extensions can also be created with paint and a delineator such as planters or rubber barriers. The street's drainage patterns and inlets should always be considered before installing an extension.



Raised Crosswalks

Raised crosswalks are used in high-traffic areas to slow travel speeds and encourage motorists to yield to crossing pedestrians. Consider the use of raised crosswalks at one or both mid-block crossings in downtown Carthage. Street drainage should be considered for crosswalks that extend to the curb.

Pedestrian Signals and Crosswalks

At intersections, a pedestrian signal is timed with the existing traffic signal and is used to stop roadway traffic and allow pedestrians to cross safely. Well-marked crosswalks are essential for a good walking environment and to alert motorists to pedestrian conflict areas, increase motorists yielding to pedestrians, enhance motorists’ recognition of intersections, and attract pedestrians to the best crossing places with the most appropriate sight distances. Consider installing pedestrian signals and crosswalks at the Broad Street intersection.



Parking and Rideshare Pick-up /Drop-off Zones

Overall parking appears to be sufficient along the corridor, especially in downtown Carthage. Should demand increase, consider evaluating side streets as an alternative. In addition, assigning parking stalls as designated rideshare pick-up/drop-off zones can provide a solution for patrons choosing not to drive Downtown.

Parklets

Parklets utilize existing parking spaces and are typically applied when the existing sidewalk is too congested or is not wide enough to accommodate the installation of traditional sidewalk cafes additional seating capacity. Parklets can be temporary or permanent and are designed not to impact the street’s drainage.

Landscaping and Public Art

Public art and landscaping in downtowns can vary widely and can be used to calm traffic and enhance the aesthetics of a community. Murals can be placed on store fronts or the sides of buildings, and sculptures and gateway signs are great ways to communicate a community’s identity. Landscaping, sculptures and gateway signs can be placed in public right-of-way and on private property where allowed. Consider utilizing the public right-of-way at the Broad Street intersection in West Carthage for gateway signage or public



art. If allowed the hatched median in downtown West Carthage could be utilized for landscaping and the green space adjacent to the Carthage Family Health Center could be used as flex public space by adding a small trail and benches.

Flashing Crosswalk Signals

A flashing crosswalk signal or beacon such as a rectangular rapid flashing beacon (RRFB) uses an irregular flash pattern to draw roadway users' attention to a crossing when a pedestrian is present. These warning devices can be actuated with a pedestrian push button or may also be activated through passive detection. Solar-powered signals can eliminate the need for a power source.

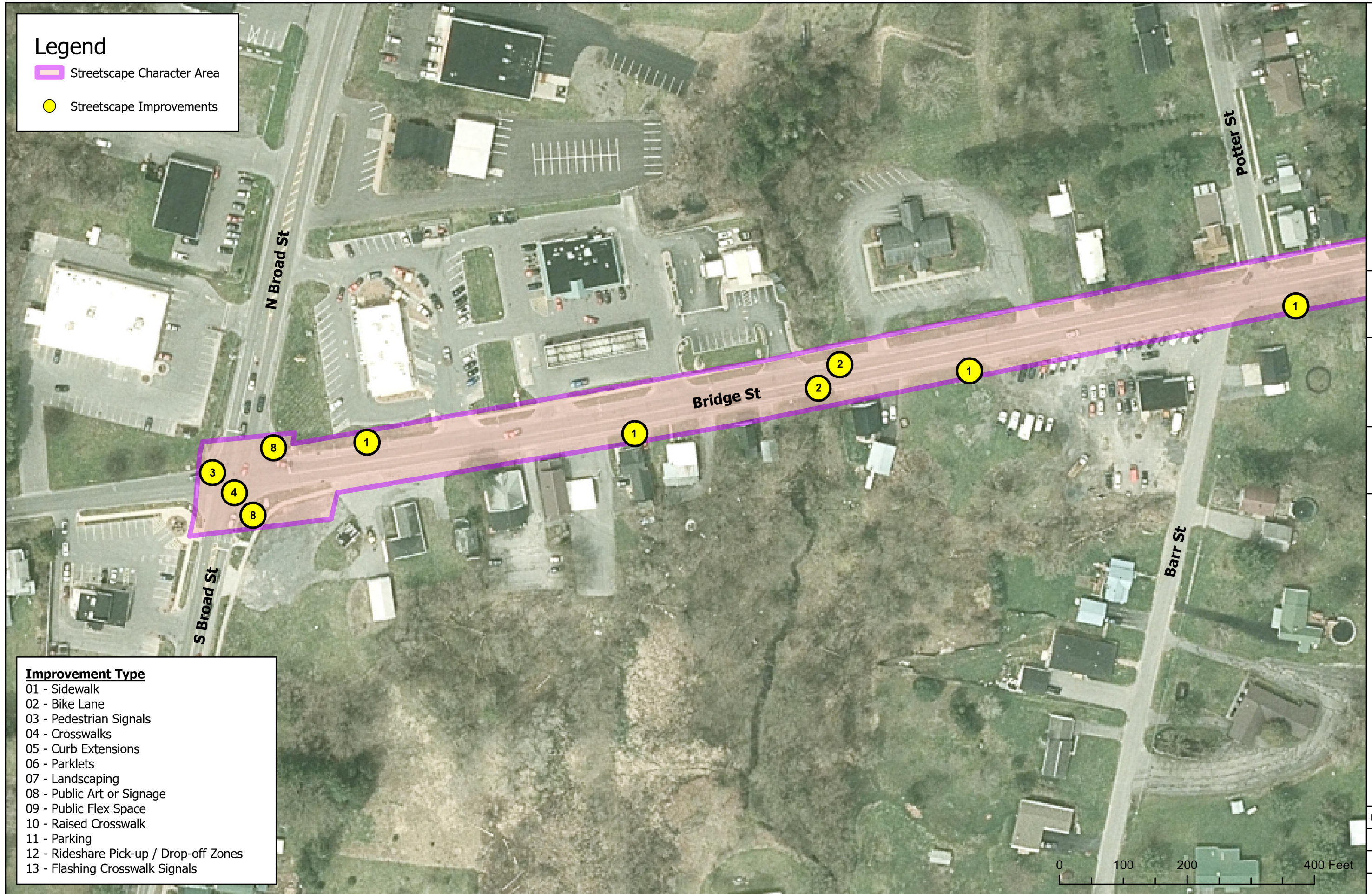


Legend

- Streetscape Character Area
- Streetscape Improvements

Improvement Type

- 01 - Sidewalk
- 02 - Bike Lane
- 03 - Pedestrian Signals
- 04 - Crosswalks
- 05 - Curb Extensions
- 06 - Parklets
- 07 - Landscaping
- 08 - Public Art or Signage
- 09 - Public Flex Space
- 10 - Raised Crosswalk
- 11 - Parking
- 12 - Rideshare Pick-up / Drop-off Zones
- 13 - Flashing Crosswalk Signals



VILLAGE OF WEST CARTHAGE
JEFFERSON COUNTY, NEW YORK
STREETSCAPE AREA #1



Drawn By: DSA
Scale: AS SHOWN
Date: NOV 2022

MRB | group
Engineering, Architecture & Surveying, D.P.C.
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www.mrbgroup.com

PROJECT NO.
2329.22001
SHEET NO.
1 of 5

Legend

- Streetscape Character Area
- Streetscape Improvements

Potter St

Vincent St

Stone St

Madison St

Bridge St

Bridge St

Rulison St

1

2

2

Improvement Type

- 01 - Sidewalk
- 02 - Bike Lane
- 03 - Pedestrian Signals
- 04 - Crosswalks
- 05 - Curb Extensions
- 06 - Parklets
- 07 - Landscaping
- 08 - Public Art or Signage
- 09 - Public Flex Space
- 10 - Raised Crosswalk
- 11 - Parking
- 12 - Rideshare Pick-up / Drop-off Zones
- 13 - Flashing Crosswalk Signals



DSA
AS SHOWN
NOV 2022

Drawn By:
Scale:
Date:

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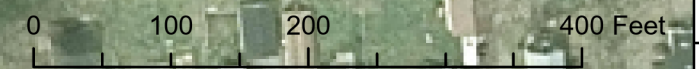
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PROJECT NO.

2329.22001

SHEET NO.

2 of 5



Legend

- Streetscape Character Area
- Streetscape Improvements

Bridge St

Madison St

N Jefferson St

Vincent St

N Main St

11

13

5

13

5

Bridge St

11

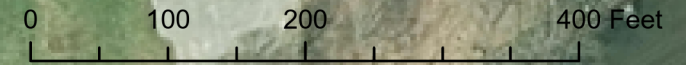
S Jefferson St

11

S Main St

Front St

Liberty St



Improvement Type

- 01 - Sidewalk
- 02 - Bike Lane
- 03 - Pedestrian Signals
- 04 - Crosswalks
- 05 - Curb Extensions
- 06 - Parklets
- 07 - Landscaping
- 08 - Public Art or Signage
- 09 - Public Flex Space
- 10 - Raised Crosswalk
- 11 - Parking
- 12 - Rideshare Pick-up / Drop-off Zones
- 13 - Flashing Crosswalk Signals



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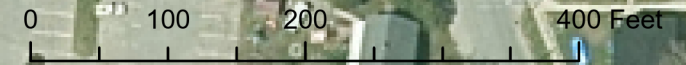
VILLAGE OF WEST CARTHAGE
JEFFERSON COUNTY, NEW YORK
STREETSCAPE AREA #3

Legend

- Streetscape Character Area
- Streetscape Improvements

Improvement Type

- 01 - Sidewalk
- 02 - Bike Lane
- 03 - Pedestrian Signals
- 04 - Crosswalks
- 05 - Curb Extensions
- 06 - Parklets
- 07 - Landscaping
- 08 - Public Art or Signage
- 09 - Public Flex Space
- 10 - Raised Crosswalk
- 11 - Parking
- 12 - Rideshare Pick-up / Drop-off Zones
- 13 - Flashing Crosswalk Signals



VILLAGE OF WEST CARTHAGE
JEFFERSON COUNTY, NEW YORK
STREETSCAPE AREA #4

Drawn By: DSA
Scale: AS SHOWN
Date: NOV 2022

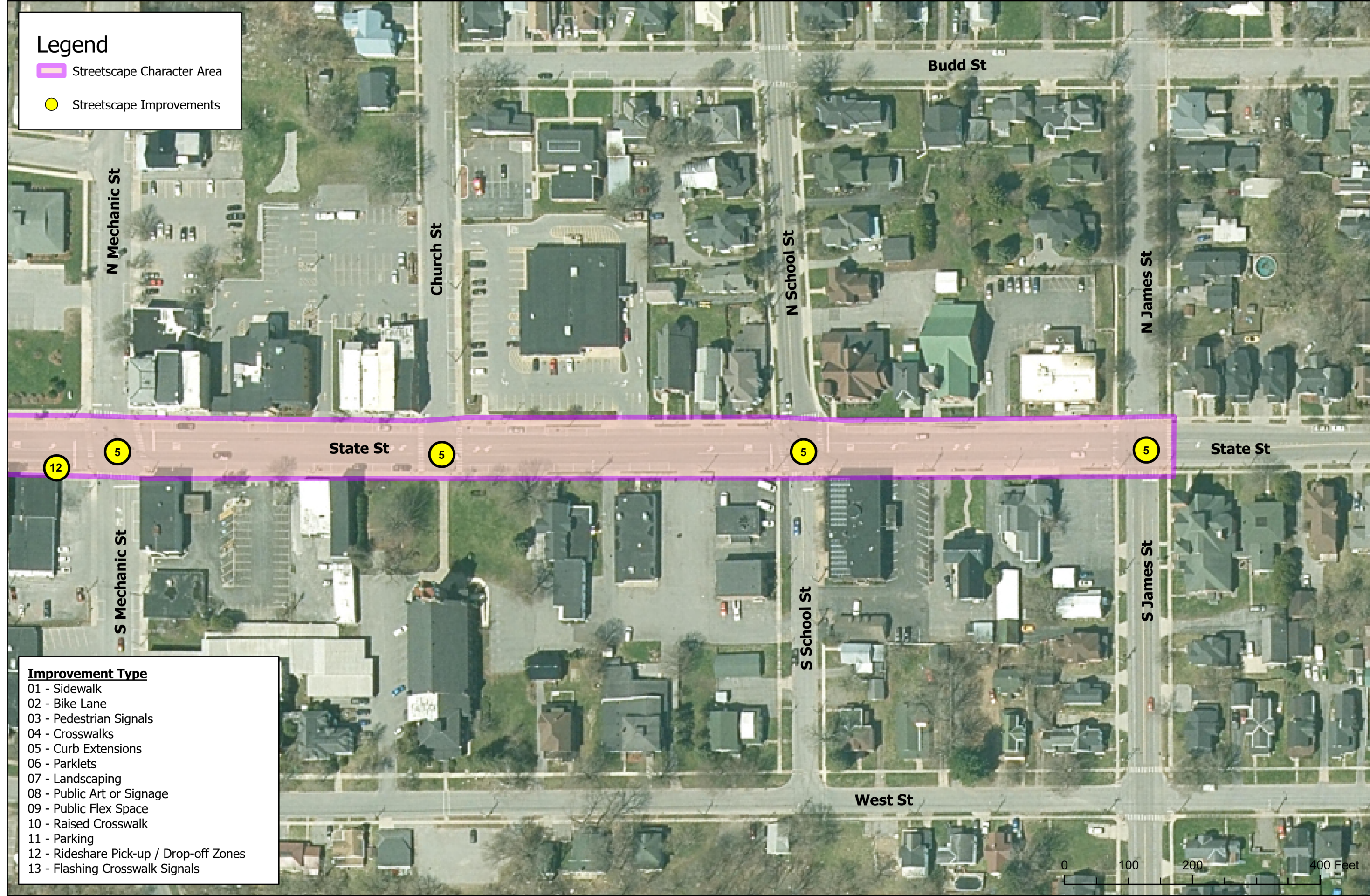
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4 of 5

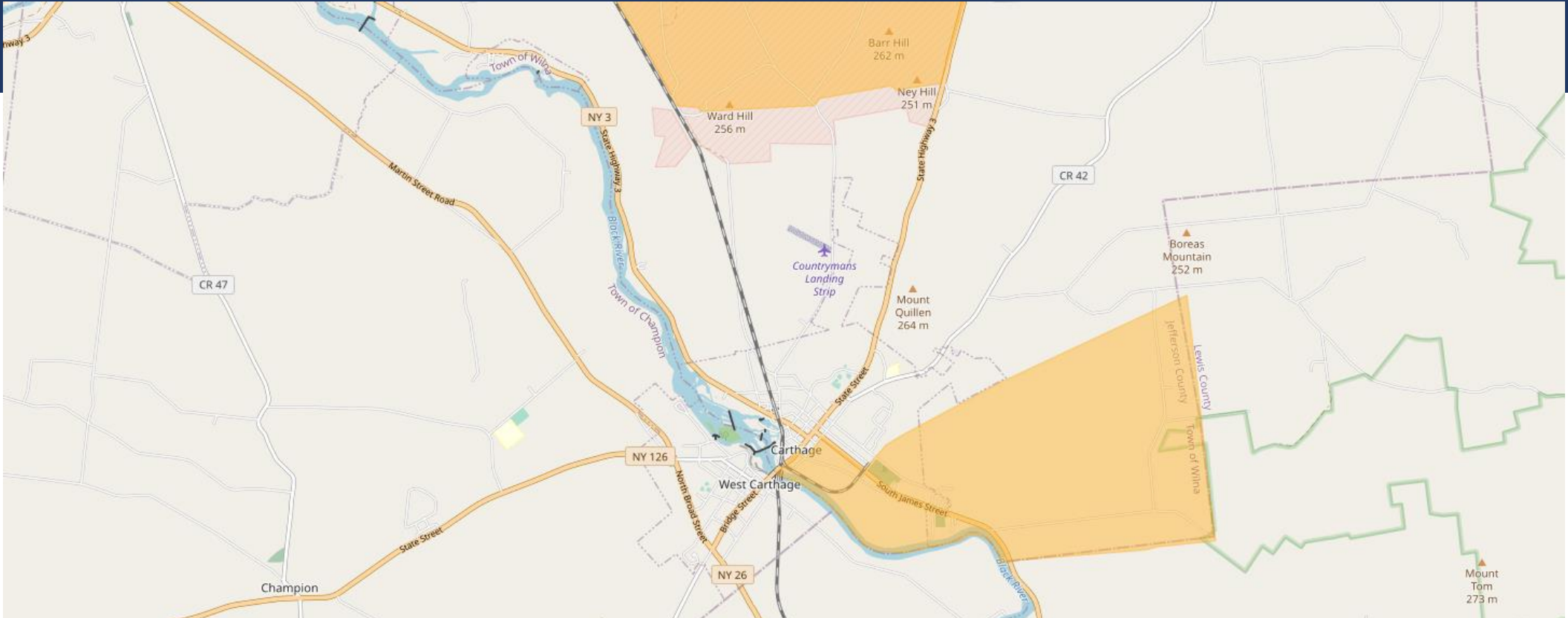
Legend

- Streetscape Character Area
- Streetscape Improvements

- Improvement Type**
- 01 - Sidewalk
 - 02 - Bike Lane
 - 03 - Pedestrian Signals
 - 04 - Crosswalks
 - 05 - Curb Extensions
 - 06 - Parklets
 - 07 - Landscaping
 - 08 - Public Art or Signage
 - 09 - Public Flex Space
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 - 11 - Parking
 - 12 - Rideshare Pick-up / Drop-off Zones
 - 13 - Flashing Crosswalk Signals



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SHEET NO. 5 of 5	
VILLAGE OF WEST CARTHAGE JEFFERSON COUNTY, NEW YORK STREETScape AREA #5	



Appendix D: Resiliency & Post Pandemic Toolkit

Prepared by:



November 2022

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Community Development	77
Healthcare.....	78
Accessing Authoritative Data.....	78

Communication and Collaboration

“Toolkit: Creating and Maintaining Coalitions and Partnerships,” Community Tool Box

This toolkit provides guidance for creating a partnership among different organizations to address a common goal.

<https://ctb.ku.edu/en/creating-and-maintaining-coalitions-and-partnerships>

“ASPR TRACIE Topic Collections: Communication, Information Sharing, Risk Communications/Emergency Public Information and Warning, and Social Media in Emergency Response” HHS Healthcare Emergency Preparedness Information Gateway

Robust communication systems can allow first responders and medical professionals to maintain communication after a disaster, and the timely and effective sharing of information within and across jurisdictions, disciplines, and organizations is critical to an effective public health emergency and disaster response. These Topic Collections include resources focused on creating and maintaining resilient emergency communication systems, the types of information that need to be shared continuously and during an emergency, and using social media for communication in an emergency.

<https://optimizingruralhealth.org/optimizing-for-systems-change/>

<https://asprtracie.hhs.gov/technical-resources/80/information-sharing/77>

<https://asprtracie.hhs.gov/technical-resources/79/risk-communications-emncy-public-information-and-warning/77>

<https://asprtracie.hhs.gov/technical-resources/73/social-media-in-emncy-response/77>

“Collaboration Training Resources,” Candid

A compilation of resources offered by Candid, a philanthropy focused database and resource library, about building collaborative nonprofit efforts. Resources range from podcasts to trainings.

<https://learning.candid.org/training-search/? search field=collaboration& format=on-demand>

Community Preparedness

“Preparedness Toolkit (PrepToolkit),” FEMA

- Collaborative Environment: Share ideas, information, files, and data with national peers and stakeholders
- Interactive Tools: Link exercises to the Core Capabilities and targets defined in the latest Threat and Hazard Identification and Risk Assessment guidance
- Scalable Solutions: Designed for agencies, organizations, and jurisdictions of any size and type

<https://preptoolkit.fema.gov/>

“Community Preparedness Toolkit,” ready.gov

The Community Preparedness Toolkit provides step-by-step directions along with useful resources for making your community safer, more resilient, and better prepared. The Toolkit can be used to develop a community-based approach to preparedness, such as a Citizen Corps Council—FEMA’s grassroots strategy to bring together government and community leaders to involve citizens in all-hazards emergency preparedness and resilience.

<https://www.ready.gov/community-preparedness-toolkit>

“Assistance for Governments and Private Non-Profits After a Disaster,” FEMA

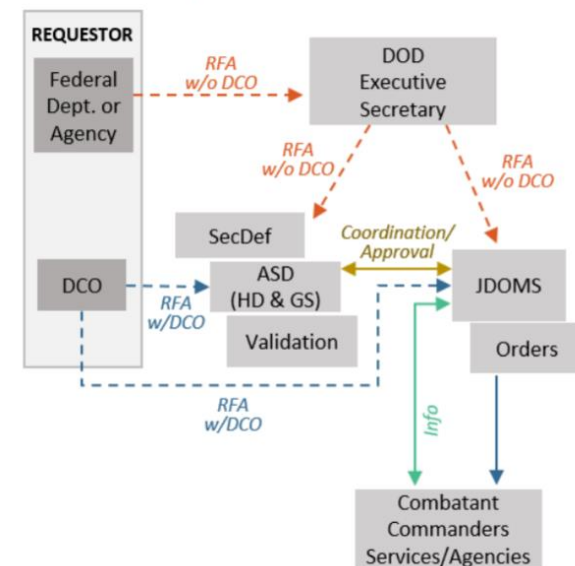
Guide of the relevant information needed to identify and navigate funding to help state, local, tribal, and territorial governments and certain types of private nonprofit organizations respond to and recover from major disasters or emergencies.

<https://www.fema.gov/assistance/public>

“Defense Primer: Defense Support of Civil Authorities,” Congressional Research Service

Defense support of civil authorities in response to disasters is typically carried out in accordance with the National Response Framework (NRF), which is a structure of preparedness that guides the nation in responding to domestic disasters and emergencies.

Figure 1. The Request for Assistance (RFA) Process



Evaluation Criteria: Legality, lethality, risk, cost, readiness, appropriateness

Under the NRF framework, local and state governments are expected to put forth their best effort during incidents within their jurisdiction. They should only request federal assistance when their resources are overwhelmed. At that point, DOD may provide support in response to the Request for Assistance (RFA), typically as part of a broader federal response.

Examples of Defense Support of Civil Authorities:

- Response to natural disasters
- Special events
- Border security
- Oil spill response
- The COVID-19 response

DOD evaluates requests based on six criteria:

- Legality: compliance with the law
- Lethality: potential for use of lethal force by or against DOD personnel
- Risk: safety of DOD personnel
- Cost: source of funding and effect on the DOD budget
- Readiness: impact on DOD's ability to perform its primary mission
- Appropriateness: whether providing the support is in the interest of DOD

<https://sgp.fas.org/crs/natsec/IF11324.pdf>

“Cyber Risks to Next Generation 911,” Department of Homeland Security

Traditional 911 services typically operate over standard voice-based telephone networks and use software, such as computer-aided dispatch systems, that operate on closed, internal networks with little to no interconnections with other systems. As cyber threats grow in complexity and sophistication, attacks could be more severe against an NG911 system as attackers can launch multiple distributed attacks with greater automation from a broader geography against more targets.

https://www.911.gov/pdf/OEC_Fact_Sheet_Cyber_Risks_NG911.pdf

Resiliency

USEPA Regional Resilience Toolkit

FEMA and EPA partnered with the Metropolitan Transportation Commission/Association of Bay Area Governments (MTC/ABAG) to create a toolkit that helps regions plan for disasters by working across multiple jurisdictions and with non-governmental partners.

<https://www.epa.gov/smartgrowth/regional-resilience-toolkit>

HUD Community Resilience Toolkit

The HUD Community Resilience Toolkit is a user-friendly guide to help recipients of HUD Community Planning and Development (CPD) funds identify opportunities to use their CPD dollars to mitigate the impacts of natural related hazards. The toolkit is divided into 6 separate sections, each related to a specific natural hazard.

<https://www.hudexchange.info/resource/5981/community-resilience-toolkit/>

State and Local Planning for Energy (SLOPE) tool

Department of Energy (DOE): The SLOPE Data Viewer is designed to deliver modeled energy data resolved at state and local jurisdictional levels. Users can explore energy data potential and projections to better understand opportunities and options in energy planning. Population and building area data provide metrics to enable quantifiable goal setting.

<https://maps.nrel.gov/slope/>

Clean Energy Solutions for Low Income Communities toolkit

This toolkit provides an overview of tools, resources, and models for developing low-income energy efficiency and renewable energy programs based on work in the U.S. Department of Energy's CELICA, part of the Better Buildings Initiative Accelerators. This toolkit provides materials to help program administrators reduce energy burden for low-income communities by enhancing and expanding upon work funded through utility, state, or federal programs.

<https://betterbuildingsolutioncenter.energy.gov/CELICA-Toolkit>

Low Income Affordability Data (LEAD) tool

This DOE Low-Income Energy Affordability Data (LEAD) Tool was created to help stakeholders understand housing and energy characteristics for low- and moderate-income households. Using data, maps, and graphs from the LEAD Tool, stakeholders can make data-driven decisions when planning for their energy goals.

<https://www.energy.gov/eere/slsc/low-income-energy-affordability-data-lead-tool>

Climate Change and the Electricity Sector: Guide for Climate Change Resilience Planning

This Guide provides basic assistance to electric utilities and other stakeholders in assessing vulnerabilities to climate change and extreme weather and in identifying an appropriate portfolio of resilience solutions.

https://toolkit.climate.gov/sites/default/files/Climate%20Change%20and%20the%20Electricity%20Sector%20Guide%20for%20Climate%20Change%20Resilience%20Planning%20September%202016_0.pdf

USEPA Smart Growth Tools

EPA offers a wide variety of tools and resources to help communities learn about and implement smart growth approaches in various categories, including: Brownfields and Infill Development; Climate Change; Disaster Resilience and Recovery; Economic Development; Planning, Zoning, and Building Codes; Transportation; Water Quality.

<https://www.epa.gov/smartgrowth/smart-growth-tools>

Businesses

“Coronavirus Small Business Survival Guide: All Our Content in One Place,” U.S. Chamber of Commerce

Complete listing of all U.S. Chamber of Commerce resources for small businesses, organized by category to help users easily navigate the content.

<https://www.uschamber.com/co/start/strategy/small-business-resources-for-surviving-coronavirus>

“Business Continuity Plan,” ready.gov

Development of a business continuity plan in four steps.

<https://www.ready.gov/business-continuity-plan>

“Business Continuity Planning Suite,” ready.gov

This software was created for any business with the need to create, improve, or update its business continuity plan. The Suite is scalable for optimal use by organizations of any size and consists of a business continuity plan (BCP) training, automated BCP and disaster recovery plan (DRP) generators, and a self-directed exercise for testing an implemented BCP. Businesses can utilize this solution to maintain normal operations and provide resilience during a disruption.

<https://www.ready.gov/business-continuity-planning-suite>

Remote Work and Communication

“When governments go remote,” McKinsey and Company

As COVID-19 forces government organizations to embrace virtual work, leaders must reimagine how they engage and collaborate with their colleges. This article provides basic tools for remote working.

<https://www.mckinsey.com/industries/public-and-social-sector/our-insights/when-governments-go-remote>

“Tips for Effectively Communicating with the Whole Community in Disasters,” FEMA

Practices regarding effective communication to help jurisdictions meet their obligations to carry out their disaster related activities in a non-discriminatory manner.

<https://www.dhs.gov/publication/tips-effectively-communicating-protected-populations-during-preparedness-response-and>

“A Practical Guide on Teleworking during the COVID-19 Pandemic,” International Labour Organization

Practical and actionable recommendations for effective teleworking that are applicable to a broad range of actors; to support policymakers in updating existing policies; and to provide a flexible framework through which both private enterprises and public sector organizations can develop or update their own teleworking policies and practices.

https://www.ilo.org/travail/info/publications/WCMS_751232/lang--en/index.htm

Families and Households

“Make a Plan,” Ready.gov

General content for making disaster preparedness plans for families, including several steps and a series of questions that identify whether a household is prepared to handle a disaster. Also includes materials for creating preparedness content such as emergency communication plans, documents to insure property, and information about alerts and warnings.

<https://www.ready.gov/plan>

“When Disaster Strikes: Promising Practices – Mobile Home Residents,” mdcinc.org

A number of factors, including structural and non-structural issues, combine to make mobile home residents particularly vulnerable to natural disasters. Includes resources for preparedness, response, and recovery stages.

<https://www.mdcinc.org/wp-content/uploads/2017/08/When-Disaster-Strikes-Promising-Practices-Mobile-Home-Residents.pdf>

Economic Development

“Place Marketing: How One Midwestern City Is Transforming Its Brand,” Shama Hyder

Placemaking generally refers to a manner of planning and designing public spaces to contribute to a community’s quality of life and wellbeing. It’s heavily reliant on taking the unique aspects of a specific community and communicating them through design—in other words, creating a space that feels grounded and specific to the community it’s in.

<https://www.forbes.com/sites/shamahyder/2019/10/30/place-marketing-how-one-midwestern-city-is-transforming-its-brand/?sh=7d0120272e05>

“Why Place Branding Is Becoming Place Doing (Consider Austin),” Marian Salzman

“Branding” suggests that successfully selling a destination, company or individual is simply about giving it some catchy promotion. But selling a location involves so much more than sticking a label on it. Austin shows how ongoing “place doing” works. Actions speak louder than logos. Local marketers have found ways to play up the idea of “keeping Austin weird” without alienating the locals who truly want it that way.

<https://mariansalzman.com/blog/why-place-branding-is-becoming-place-doing-consider-austin/>

“WealthWorks Rural Economic Development Case Studies,” Carrie Kissel, NADO.org

Rural wealth creation is an approach to community and economic development that is demand-driven, focusing on market opportunities that capitalize on a community’s existing assets or underutilized resources. Wealth creation is intentionally inclusive, building lasting livelihoods for those who may not have been at the table before, and it supports local ownership and control of assets. This series of case studies examines how livelihoods are being improved and communities are undergoing development.

<https://www.nado.org/wealthworks-case-studies/>

“Reshoring advanced manufacturing supply chains to generate good jobs,” Andrew Fish & Nora Spillane, The Brookings Institution

The United States has an opportunity to leverage industry-led supply chain resiliency strategies to localize advanced manufacturing and transition workers from low-paying retail and service employment into better jobs. The country can create strategic manufacturing industries in cities and rural areas, connecting individuals who were disproportionately affected by COVID-19 to these high-quality jobs.

<https://www.brookings.edu/research/reshoring-advanced-manufacturing-supply-chains-to-generate-good-jobs/>

Community Development

“Toolkit: Applying for Grants,” Community Tool Box

Part I gives a step-by-step overview of the grant-writing process. Part II provides a general template for writing a grant application. Completing Part II will give you a solid proposal that can be adapted to meet specific grant opportunities and review criteria for specific funders.

<https://ctb.ku.edu/en/applying-for-grants>

“Affordable Housing – Toolkit for Counties,” National Association of Counties

Although housing affordability affects counties of all sizes in every region of the U.S., each county is unique, facing its own set of obstacles and equipped with its own set of tools to navigate these obstacles. This toolkit, therefore, outlines the role of counties in identifying and addressing housing affordability gaps through solutions involving inter-jurisdictional partnerships; funding and financing solutions; planning and zoning strategies; and federal resources. The toolkit includes an appendix, which discusses common housing affordability metrics, reviewing their characteristics and limitations. This toolkit summarizes and builds on research conducted by the NACo Counties Futures Lab throughout 2018.

<https://www.naco.org/resources/featured/affordable-housing-toolkit-counties>

“Outdoor Towns Toolkit,” townsandtrailstoolkit.com

A variety of web-based resources that provide steps and case studies for building community engagement and progressing towards becoming a town that uses its natural assets to bring people together and revitalize economies.

<https://townsandtrailstoolkit.com/>

“Trail Planning Workshop – Toolkit,” National Park Service

Russell Clark designed this step-by-step guide for communities, partners, and local jurisdictions to use in developing and implementing a trail planning workshop. Included are tools to help workshop participants identify community assets, establish trail priorities and brainstorm ideas for future linkages.

<https://www.nps.gov/orgs/rtca/upload/Trail-Planning-Workshop-Toolkit.pdf>

Healthcare

“Rural Community Health Toolkit,” Rural Health Information Hub

Provides rural communities with the information, resources, and materials they need to develop a community health program.

<https://www.ruralhealthinfo.org/toolkits/rural-toolkit>

“Optimizing for Systems Change,” Center for Optimizing Rural Health

This organization works with rural facilities, their providers, and their communities to improve the quality of care, maintain access to care, and address the challenges unique to small hospitals and the towns they serve.

<https://optimizingruralhealth.org/optimizing-for-systems-change/>

“ASPR TRACIE Topic Collection: Disasters and Healthcare Disparity,” HHS Healthcare Emergency Preparedness Information Gateway

Healthcare professionals and emergency managers may benefit from a better understanding of the complex relationships that affect fair access to healthcare. The resources in this Topic Collection highlight the considerations, factors, and lessons learned from a variety of natural and human-caused disasters and provide guidance for healthcare practitioners who are committed to addressing healthcare disparity.

<https://asprtracie.hhs.gov/technical-resources/156/disasters-and-healthcare-disparity/0>

“ASPR TRACIE COVID-19 Resources,” HHS Healthcare Emergency Preparedness Information Gateway

Database of resources identified or developed to address current response and recovery operations to novel coronavirus 2019 (COVID-19), the disease caused by the SARS-CoV-2 virus.

<https://asprtracie.hhs.gov/COVID-19>

Accessing Authoritative Data

One of the primary benefits of an effective geographic information system (GIS) is how it supports data-driven decision making. It empowers county leaders to stop guessing and to stop working off anecdotal or dated information, by using and analyzing authoritative geospatial data.

“Jefferson County Map Viewer and Resource Maps”- Jefferson County Planning Department

Jefferson County hosts an internet mapping application that includes parcel information, as well as layers for points of interest, natural resources, and some Census data. In addition, they offer a series of static “Resource Maps” showing agricultural districts, demographics, major transportation routes, land use, and more.

GIS map viewer: <http://www.jeffcountymaps.com/>

Resource maps: <https://co.jefferson.ny.us/departments/Planning/resource-maps>

“Resilience Analysis and Planning Tool” (RAPT)

The Resilience Analysis and Planning Tool (RAPT) is a free GIS web map that allows federal, state, local, tribal and territorial emergency managers and other community leaders to examine the interplay of census tract data (i.e., housing, socio-economic information, etc.), county indicators (including community resilience information), infrastructure locations, and hazards, including real-time weather forecasts, historic disasters and estimated annualized frequency of hazard risk.

<https://fema.maps.arcgis.com/apps/webappviewer/index.html?id=90c0c996a5e242a79345cdb5f758fc6>

“National Economic Resilience Data Explorer” (NERDE) – Argonne National Laboratory

The NERDE consolidates information and data on economic distress criteria, COVID-19 impacts to local economies, and the existence and emergence of industry clusters. These data also help inform communities on the criteria that may indicate eligibility for EDA assistance.

<https://www.anl.gov/national-economic-resilience-data-explorer-nerde>

“New York Climate Change Science Clearinghouse”

The New York Climate Change Science Clearinghouse (NYCCSC) is a regional gateway to data and information relevant to climate change adaptation and mitigation across New York State. It provides climate science data and literature and other resources for policy-makers, practitioners, and the public, to support scientifically sound and cost-effective decision making. NYCCSC also provides baseline data related to social and economic conditions such as environmental justice screening, public health and vulnerability indexes.

<https://www.nyclimatescience.org/highlights/maps>