



2. Resource Assessment and Stakeholder Feedback

Introduction

The purpose of the resource assessment was to provide an initial review of Greene County's assets relative to the retention, expansion and attraction of businesses. To this end, the Project Team examined current economic and demographic conditions, labor resources and commutation patterns, physical characteristics including transportation access and industrial parks, and various aspects of the County's quality of life. The team also placed Greene County into a regional context, comparing it with adjacent counties and communities of similar size and character.

While the resource assessment evaluates the trends, forces, and conditions influencing economic development in Greene County, the subsequent stakeholder feedback section of this chapter presents the County from the perspective of local residents, businesses, municipal leaders, property owners, and other community members, incorporating input from public meetings, employer interviews and web-based surveys.

The resource assessment is an important tool with both an internal and external perspective and provides the basis for issue and opportunity identification, as well as formulating the subsequent visioning and strategy development phases of the project.

KEY FINDINGS

- **Government is the largest employer in Greene County, accounting for 30% of all jobs.** Most of these jobs are in local government and in the state prison in Coxsackie. Greene County has a higher proportion of its employment in the public sector than either the Capital Region or other rural counties, such as Columbia and Otsego.
- **Tourism remains a critical part of the Greene County economy.** Overall employment in the Greene County tourism industry is at roughly 10% of all jobs. The level of tourism employment is greater than in Columbia, Schoharie, or Otsego Counties. Greene County also has a higher *proportion* of its employment in hospitality and food services than the Capital Region or Columbia County. (See Tourism Industry Analysis for additional information on tourism employment in Greene County.)
- **Greene County is missing much of its core service base for businesses and residents.** The proportion of employment in such industries as education, health care, business and professional services, and finance is considerably less than in the Capital Region or Columbia County. This impacts the quality of life as well as the availability of services to support County employers.

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

- **A large percentage of Greene County residents work outside the county, suggesting that sufficient job opportunities are not available locally.** Overall, 42% of employed residents work in surrounding counties, with about 18% commuting to Albany, 7% to Columbia, 6% to Ulster, and 2% to Dutchess County. Many of these are professional, scientific, management, and administrative workers, as well as individuals in the information and finance, insurance, and real estate (FIRE) industries. This indicates that employment opportunities in higher-paid professions are lacking in Greene County. It also implies that a professional, white-collar workforce exists in the county that could be tapped should job opportunities become available. These workers could also help support the workforce needs of a high-tech economy in the future.
- **Greene County has a limited number of jobs for graduates of two- and four-year colleges to allow children to “come home” after completing their education.** Attracting industries requiring college graduates is possible as a long-term strategy, but will require a concerted effort to boost educational attainment levels locally. Fully 21% of residents age 25 and over have less than a high school education, while 16% have bachelor’s degree or higher. Interestingly, although low levels of educational attainment are more prevalent among persons age 65 and over, 21% of 25-to-34 year olds and 18% of 45-to-64 year olds in Greene County lack a high school diploma.
- **Some Greene County industries rely on workers from other counties to fill jobs.** Three-quarters of all workers employed in Greene County also reside in the county. Only 60% of the County’s manufacturing jobs, however, are filled by residents; a large proportion of the manufacturing workers commute from Albany and Ulster Counties. Greene County employers indicate they are having difficulty finding entry-level workers in the hospitality/tourism, service, and manufacturing industries due to attitudinal issues such as lack of motivation, soft skills, and work ethics. The lack of competitive wages may also discourage Greene County residents from working locally.
- **Small businesses play a vital role in the Greene County economy.** The U.S. Census Bureau defines a *nonemployer* as an unincorporated business that has no paid employees, has annual business receipts of \$1,000 or more (\$1 or more in the construction industry), and is subject to federal income taxes; the business may or may not be the owner’s principal source of income. Greene County has approximately 3,200 business establishments that are considered nonemployers. This is more than twice

Approaches to economic development - highest proportion of support and strongly support responses by residents

- #1 – Encourage new start-up businesses by County residents
- #2 – Strengthen workforce education and training programs
- #3 – Renovate and reuse vacant commercial and industrial buildings
- #4 – Help existing businesses grow and expand
- #5 – Revitalize historic “Main Street” commercial districts



2. Resource Assessment and Stakeholder Feedback

the number of establishments with paid employees participating in the state's unemployment insurance program. The construction industry accounts for the highest number of nonemployers in Greene County, followed by other services (these include personal care services, pet care, automotive repair shops, and equipment repair), retail trade, and real estate and leasing. These businesses represent a potential resource for economic development and job creation.

- **Most companies that locate in Greene County have a personal or family connection, or value its location and relatively low cost of doing business.** Interviews with major employers indicate that in general, companies locate in Greene County for one of four reasons: (1) the owner or CEO has a personal interest in the County (e.g., a former resident); (2) the company is family-owned, reaching back two, three, or even four generations; (3) they perceive Greene County as a strategic location for access to the Capital Region, New England, and New York City markets; or (4) they place a premium on the lower cost of labor and land in the County relative to metropolitan areas.
- **Greene County has an increasing number of self-employed professionals, artists, and writers drawn to the area's natural beauty and quality of life.** Nearly 11% of nonemployers establishments in Greene County are in professional, technical and scientific services, including architecture, engineering, accounting, and management consulting, while 6% are in the arts, entertainment, and recreation. Anecdotal evidence suggests that the numbers have increased, especially since the events of September 11, 2001. Artists, writers, performers and other creative workers should be viewed as an important resource that enhances the quality of life and economic opportunities in Greene County. The diversity that they bring is also an essential ingredient in attracting other professionals and entrepreneurs.
- **The quality of labor is a major concern of Greene County employers.** More than 70% of those responding to a survey of Greene County businesses said that *workforce quality* should be addressed as part of the Comprehensive Economic Development Plan. On a scale of 1 to 5, with 1 defined as "excellent" and 5 defined as "poor," respondents gave labor availability an average rating of 4.06; work attitude was rated 4.00, while labor quality was rated 3.94. Based on interviews with the County's largest companies, the higher the pay scale, the more difficult it is to find a qualified worker: only 1 in 10 applicants is hired for a \$10-\$15 per hour job; 1 in 20 for a \$15-\$20 per hour job; and 1 in 50 for a \$20+ per hour job. The lack of education or

What issues should be addressed as part of the economic development plan? (Asked of businesses)

- #1 – Workforce quality
- #2 – Actively promoting the County for business attraction
- #3 – Revitalizing the County's Main Street commercial areas tied with Telecommunications infrastructure
- #4 – Workforce availability
- #5 – Policies to balance economic development and environmental quality



2. Resource Assessment and Stakeholder Feedback

appropriate experience, poor work ethics, and the inability to pass a drug test are among the barriers to employment.

- ***The quantity of labor is also an issue for local businesses.*** Although 3,800 residents from other counties commute into Greene County for employment, applicants for some types of jobs tend to seek employment in the Capital Region, where pay scales are higher. Manufacturing wages in Greene County, for example, are about 35% less than those in Albany County. Jobs for qualified high school graduates that pay less than \$15 an hour in Greene County are particularly hard to fill. Ski facilities and some resorts, however, have been able to utilize seasonal labor from South America, Australia, and New Zealand with good results.
- ***Other issues impacting economic development in Greene County include community aesthetics, the lack of planning and zoning, and the need for amenities such as health care services and shopping.*** Residents and businesses participating in the planning process agree that Greene County's strengths include its natural beauty, history, proximity to New York City and the Capital Region, relatively low cost of labor and land, transportation access, and cultural resources. These strengths, however, belie the fact that Greene County shares certain challenges with its rural neighbors, such as a limited range of retail stores and lack of access to health care services, particularly on the Mountaintop. The appearance of buildings and neighborhoods is another problem; poorly maintained properties reflect negatively on the community, sending a message to prospective employers that residents are uninvolved or unconcerned. These issues must be addressed to make Greene County more competitive with other business locations.

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

Resource Assessment Summary

Resource	Assessment/Comments
Business and Community Resources	
Industrial Parks/Buildings	Good supply of parks with available sites along Route 9W corridor only
Infrastructure/Utilities	Best along 9W corridor and in villages throughout the county.
Transportation Access	Thruway access at two interchanges along the 9W corridor.
Incentives	Existing parks have just been granted Empire Zone status.
Business Support Services	Very limited in county... most services must be sourced from Capital Region.
Workforce Development and Job Options	
Available Labor and Skills	Local skills primarily high school graduates but supply is tight near the existing industrial parks in the Towns of Coxsackie and New Baltimore. Higher skilled labor is primarily sourced from the Capital Region within a 30-45 minute commute time.
Education & Training Resources	Local training for non-technical skills at Columbia-Greene Community College and technical skills at Hudson Valley Community College, RPI and SUNY-Albany.
Career Options for Spouses	Local options for teachers, some health care, social work and with various small businesses. Commute to Albany for state government and financial services positions.
Quality of Life	
Housing Cost/Availability	Housing cost is low for the region but the supply is very limited; also, average wages are not keeping pace with average housing costs, so housing affordability is becoming a problem.
Educational Resources	Good primary & secondary schools. Community college located in Columbia County and four-year colleges in the Capital Region (45 – 60 minutes away).
Health Care Resources	Several small clinics in county... hospital is located in Columbia County.
Cultural & Recreational Opportunities	Cultural options limited locally but improving. Need to go to the Capital Region, the Berkshires, New York City, or other Hudson Valley communities. Many local options for outdoor recreation.
Restaurants & Meeting Places	Limited options locally.

Greene County Comprehensive Economic Development Plan



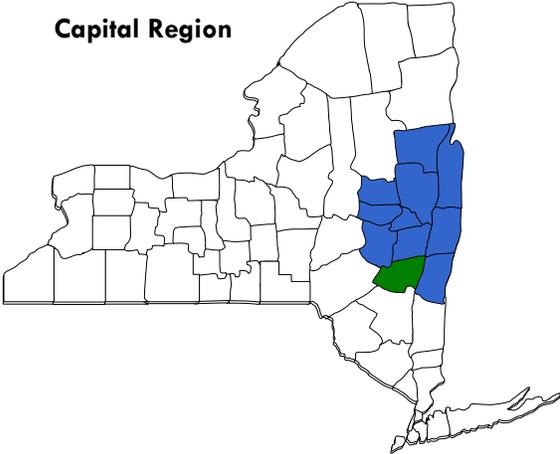
2. Resource Assessment and Stakeholder Feedback

Greene County and the Region

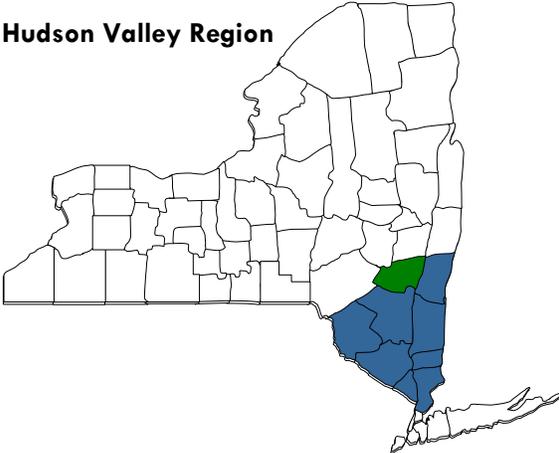
REGIONAL LOCATION

Greene County is located within several economic development regions in eastern New York State, including the Capital Region, the Hudson Valley Region and the Tech Valley Region. To the north and west is New York’s Mohawk Valley, including Fulton, Montgomery, and Otsego Counties. Greene County is not part of a designated Metropolitan Statistical Area (MSA) as defined by the U.S. Census Bureau.

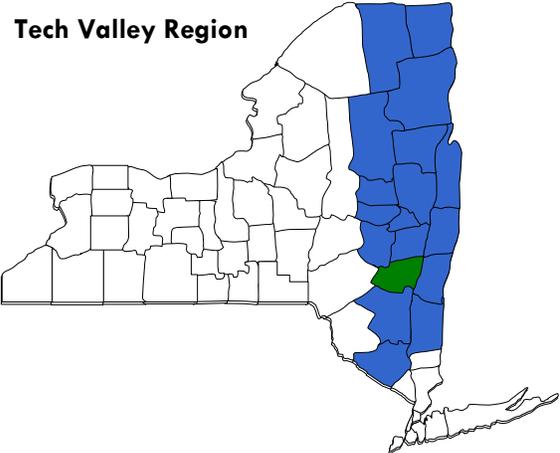
Capital Region



Hudson Valley Region



Tech Valley Region



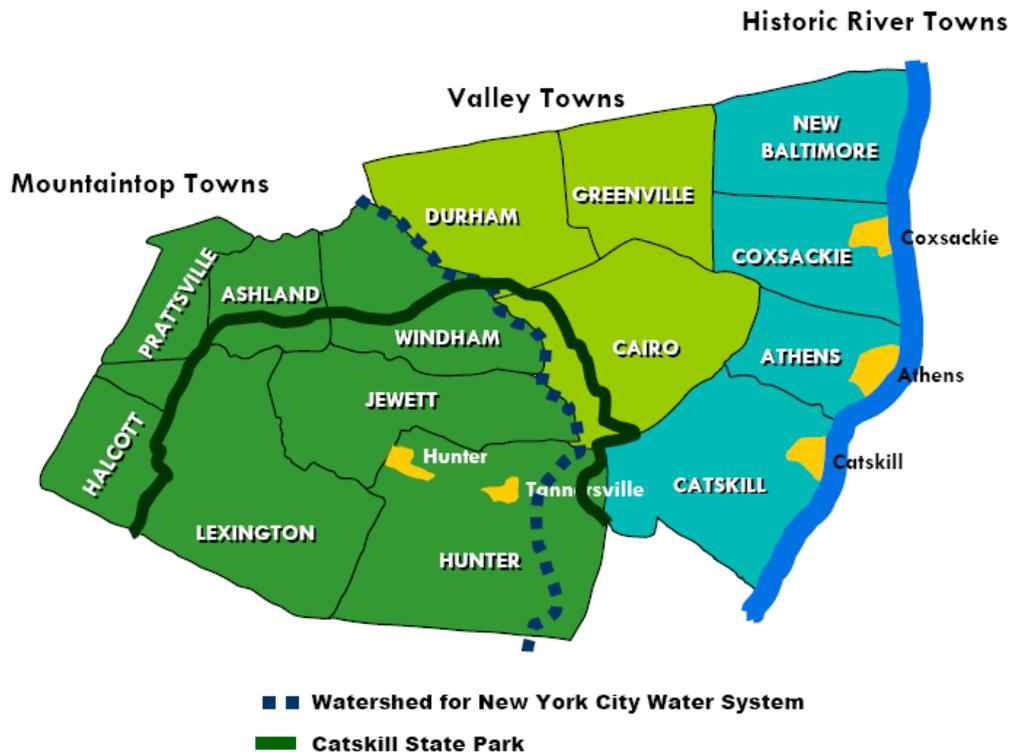
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SUBREGIONS WITHIN GREENE COUNTY

As shown below and on *Map 1* in the Appendix, Greene County is divided into three subregions that reflect its history, topography and geography:

- **Historic River Towns** – the Towns of Catskill, Athens, Coxsackie, and New Baltimore and the Villages of Catskill, Athens and Coxsackie
- **Valley Towns** – The Towns of Cairo, Durham, and Greenville
- **Mountaintop Towns** – The Towns of Ashland, Halcott, Hunter, Lexington, Jewett, Prattsville, and Windham and the Villages of Hunter and Tannersville

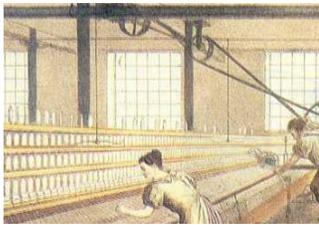
Much of the land area on the Mountaintop is within the boundaries of the New York City Watershed and/or the Catskill State Park. The additional level of land use regulations and restrictions in these areas impact the types of business operations that are allowed.



2. Resource Assessment and Stakeholder Feedback

Greene County's Economic Heritage

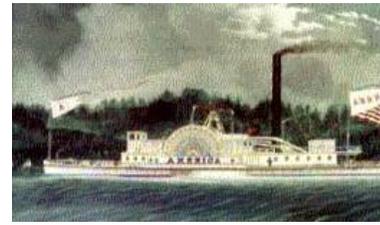
Greene County has had a very diverse economic background, leveraging its proximity to the Hudson River as well as access to water power, hemlock trees, the Catskill Mountains and flat land for agriculture.



Textile mills and clothing manufacturing



Foundries for home and farm implements, valves, etc.



Boat building and repairing



Tannin from hemlock bark was used to preserve and soften leather



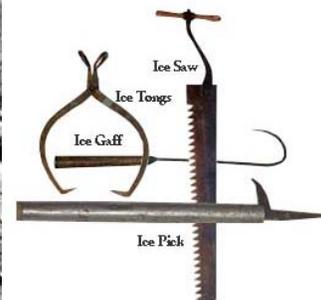
Wheat from towns to the west was milled in Catskill and shipped on the Hudson



Farming took over on former hemlock forest land



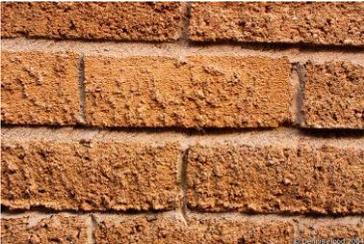
In the 19th century, harvesting ice from the Hudson River was big business for the River Towns



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback



Greene County has been known for its brick works, bluestone and limestone quarrying and cement manufacturing



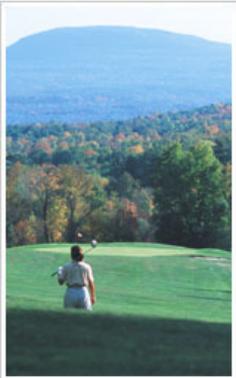
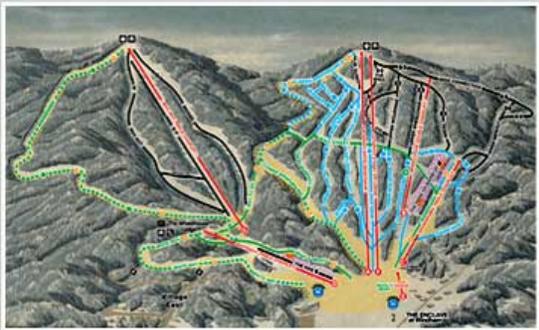
The beauty and intrigue of the Catskills inspired early American naturalist John Burroughs, painter Thomas Cole and the Hudson River School, as well as author Washington Irving

The Catskills' natural beauty stimulated the establishment of resorts and boarding houses throughout the County for city people to spend time in nature





2. Resource Assessment and Stakeholder Feedback



Year-round mountain resorts focusing on skiing, golfing and other outdoor activities were established in the 1950s and '60s



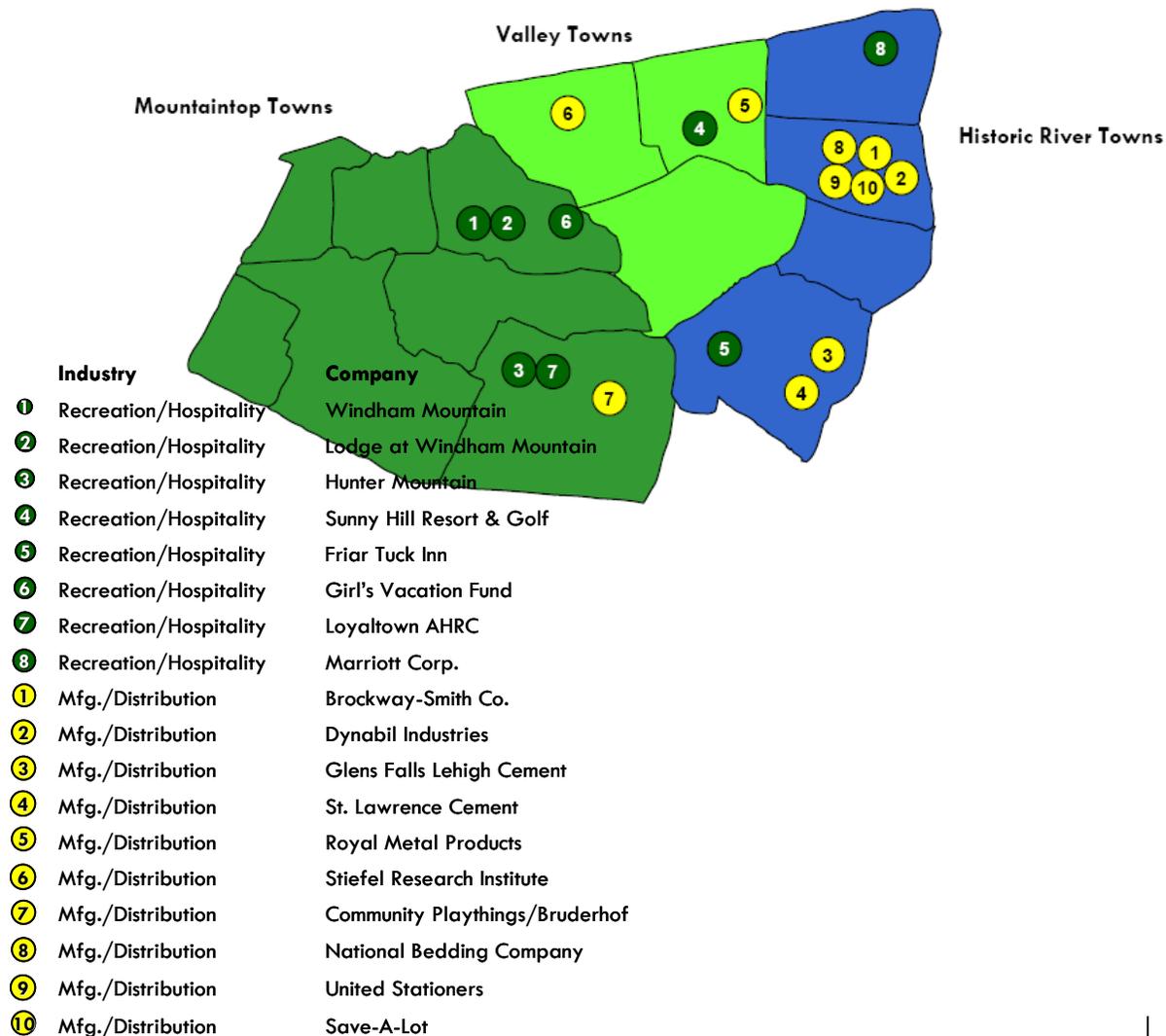


2. Resource Assessment and Stakeholder Feedback

Major Employers

The majority of Greene County’s recreation and hospitality businesses with 50 or more employees are in the Valley and Mountaintop Towns, while manufacturing and distribution is in the Valley and Historic River Towns. The larger manufacturing operations are mainly in the Town of Coxsackie due to the presence of the industrial parks and access to the NYS Thruway.

**Major Employers in Greene County:
Recreation/Hospitality and Manufacturing/Distribution**



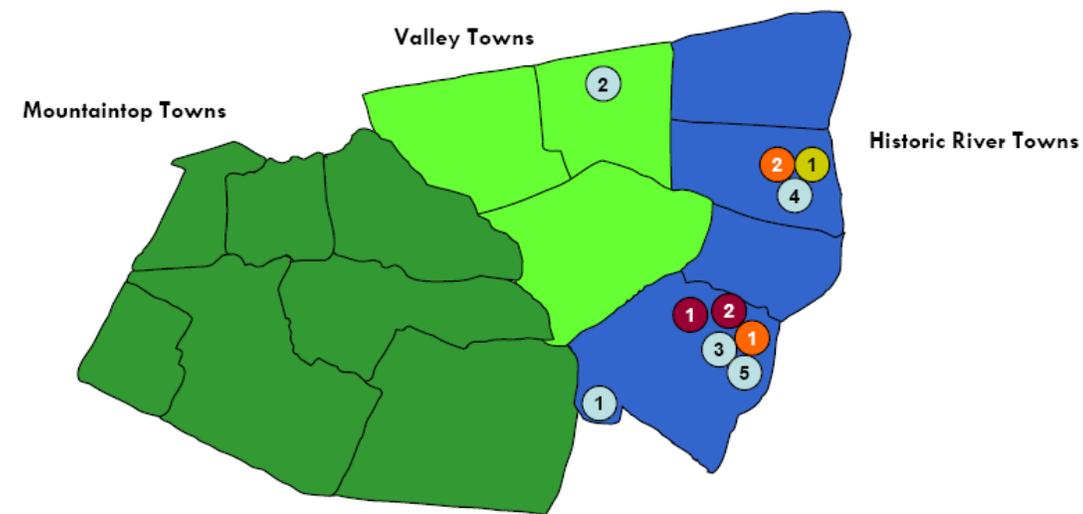
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2. Resource Assessment and Stakeholder Feedback

Other major employers in industries such as financial services, health care, transportation, and retail and wholesale are in the Historic River Towns, in communities with the highest population concentrations and access to the Thruway.

**Major Employers in Greene County:
Financial Services, Health Care, Transportation, and Wholesale/Retail Trades**



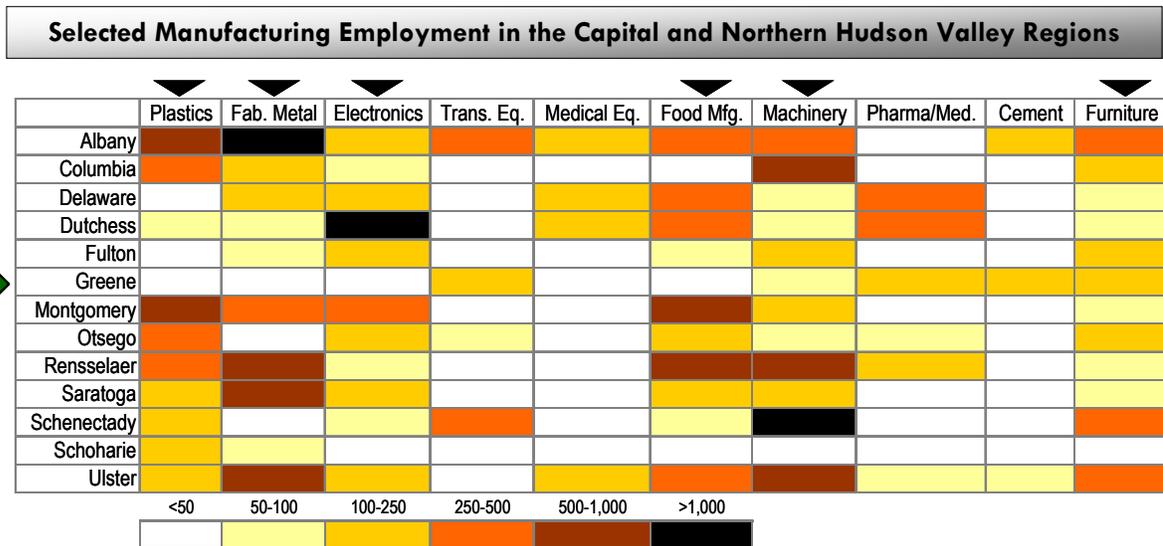
Industry	Company
① Financial Services	Greene County Bancorp
② Financial Services	Nat'l Bank of Coxsackie
① HealthCare	Columbia-Greene LT Care
② Health Care	Eden Park Health Care Ctr.
① Transportation	Coxsackie Transport
① Wholesale/Retail	Garrison Fire & Rescue
② Wholesale/Retail	Bryant's Market
③ Wholesale/Retail	Casing, Inc.
④ Wholesale/Retail	Grand Union Co.
⑤ Wholesale/Retail	Amos Post Co/Kosco



2. Resource Assessment and Stakeholder Feedback

Manufacturing Employment in the Region

Manufacturing employment in Greene County was compared with other counties that are in close proximity within the Capital Region and northern Hudson Valley area to identify significant industry concentrations. The area has a substantial concentration of employment in Plastics, Metal Fabrication, Electronics, Machinery and Furniture manufacturing. Greene County does not currently have any significant employment levels within these industries, but may be able to leverage employment in neighboring counties. (Further information and analysis of industry employment in Greene County and the region is provided in the Target Industry and Resource Analysis.)



Source: U.S. Department of Labor (2003)

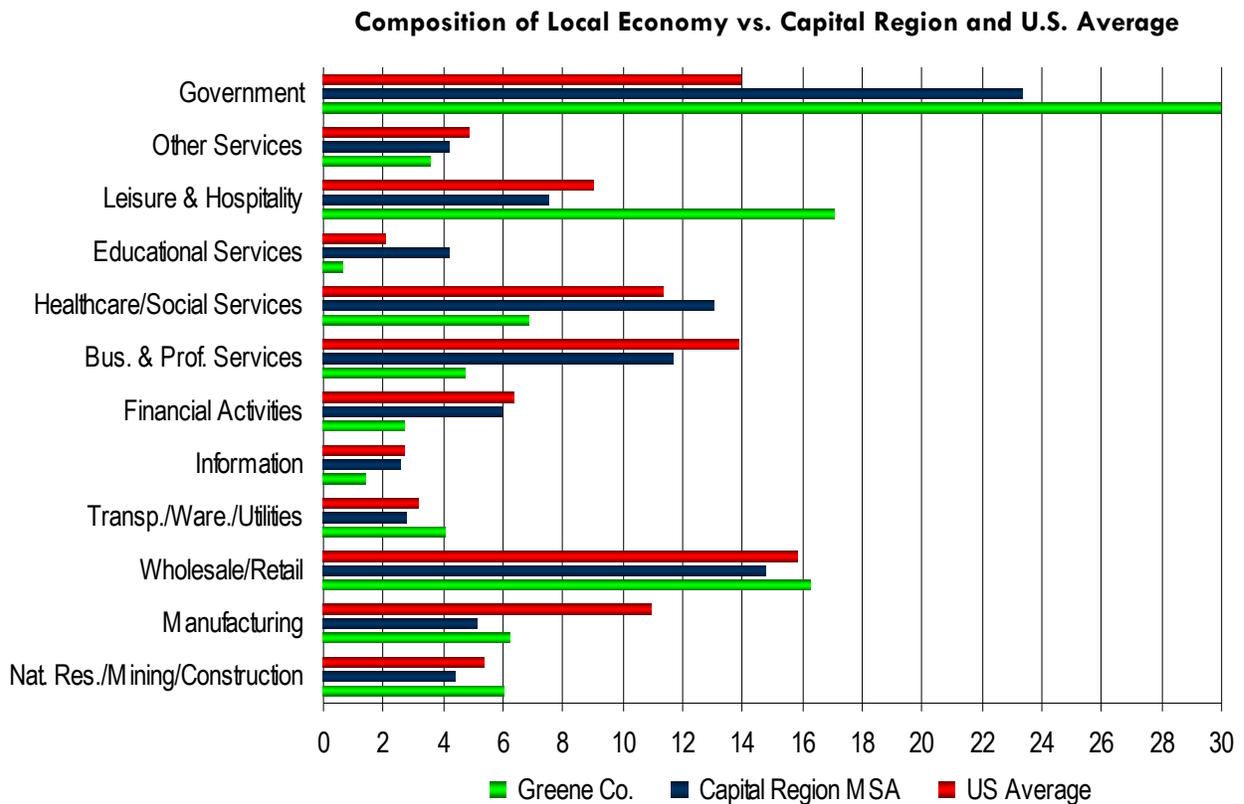


2. Resource Assessment and Stakeholder Feedback

Composition of the Local Economy

The proportion of Greene County employment in the government segment is significantly higher than the Capital Region or the U.S. average due to the presence of the state prisons in Coxsackie. Leisure and hospitality employment is also unusually high in Greene County because of the ski resorts and other tourism-related activity. (See Tourism Industry Analysis for additional information on tourism employment.)

Greene County is missing much of its core service base for businesses and residents, however. Employment in industries such as health care, business and professional services, financial activities, and information is relatively low. This can be explained in part by the County's small size in terms of population as well as the number of businesses.



Source: U.S. Department of Labor (2003)

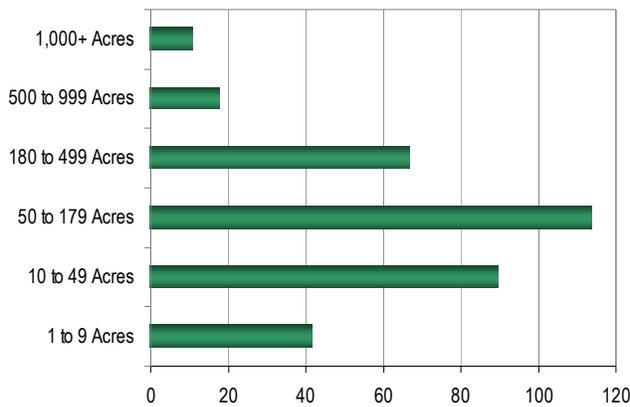


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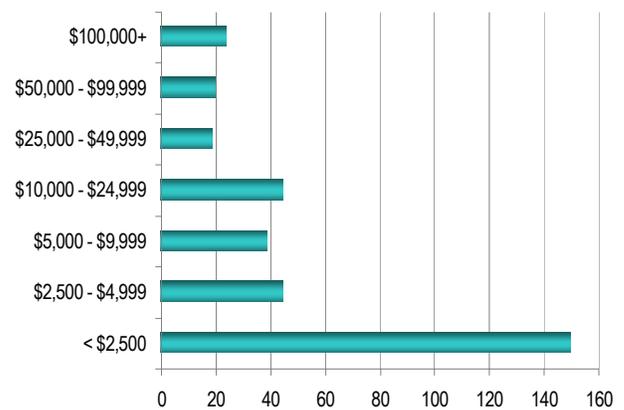
Agriculture

Farmland in Greene County encompasses approximately 58,000 acres, or 14% of the total county land mass. From 1997 to 2002, harvested cropland rose from 17,200 acres to 24,300 acres. The average size of a farm in the County is approximately 100 acres.

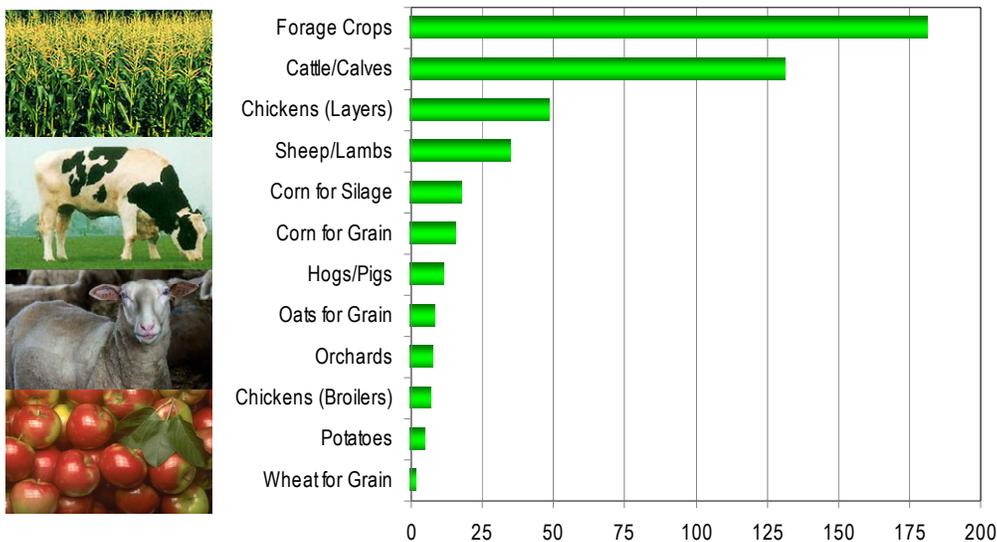
Number of Farms in Greene County by Size



Number of Farms in Greene County by Revenue



Number of Farms Engaged in Specific Agricultural Products



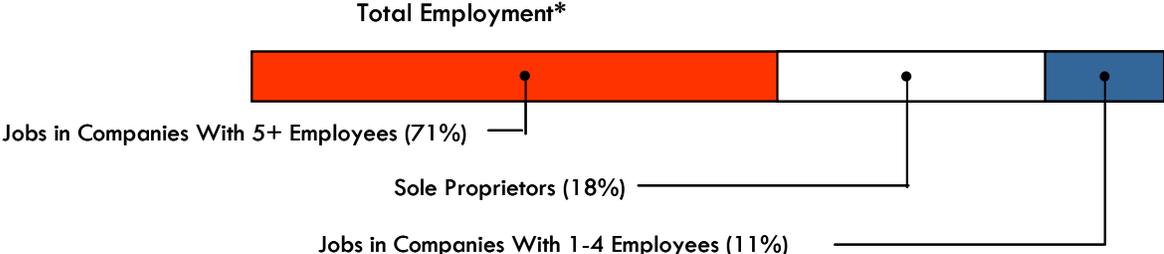
Source: U.S. Department of Agriculture, 2002



2. Resource Assessment and Stakeholder Feedback

Small Business

Small businesses play a vital role in the local economy. Four out of five business establishments in Greene County have fewer than ten employees, while 63% have less than five. Many of the establishments with 1-4 employees, known as “micro” businesses, are engaged in construction, retail, real estate, and business and professional services, employing an estimated 5,100 workers in the County.



* Includes proprietors and all non-farm part-time and full-time employees

Source: Association for Enterprise Opportunity



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

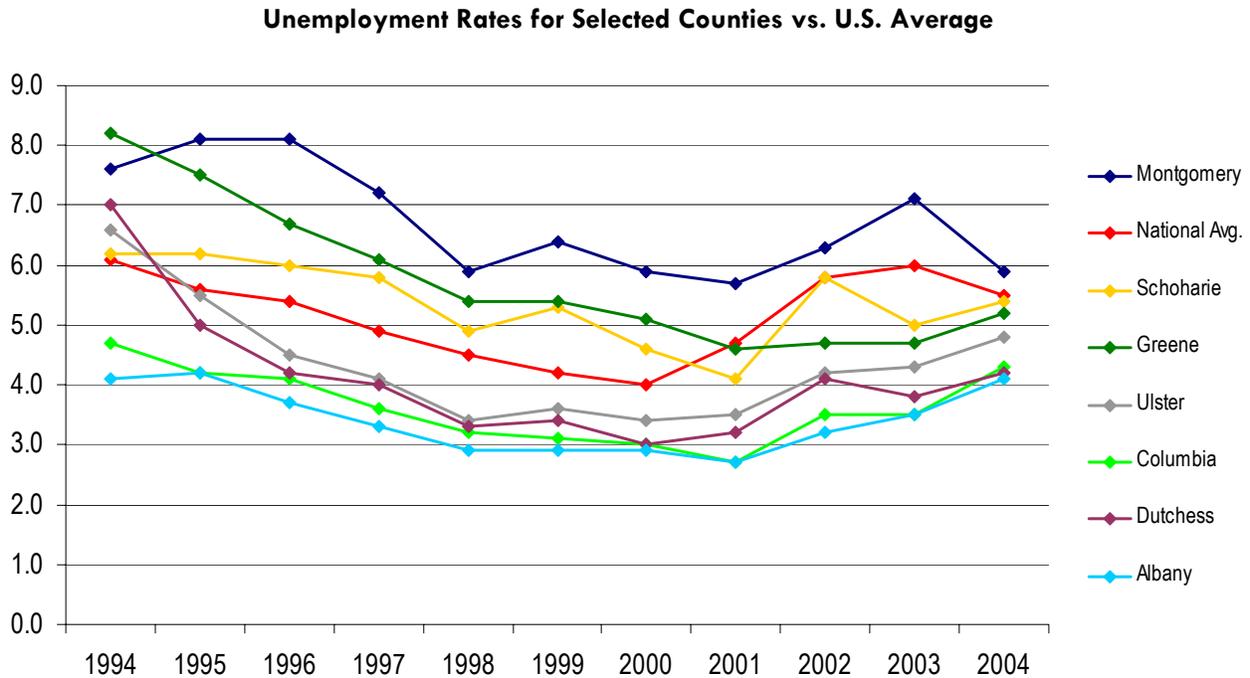
Greene County also has 3,400 business establishments that are considered nonemployers. The U.S. Census Bureau defines a *nonemployer* as an unincorporated business that has no paid employees, has annual business receipts of \$1,000 or more (\$1 or more in the construction industry), and is subject to federal income taxes; they are most often structured as sole proprietorships. These and other small businesses represent a potential resource for economic development and job creation in Greene County.

Nonemployers by Industry, Greene County	
Segment	Number of Businesses
Construction	580
Retail Trade	397
Real Estate, Rental & Leasing	378
Professional, Scientific & Technical Services	358
Health Care and Social Assistance	213
Arts, Entertainment & Recreation	212
Administrative and Waste Services	208
Transportation & Warehousing	119
Accommodations and Food Services	107
Educational Services	48
Forestry, Fishing, Hunting, & Agricultural Support	65
Manufacturing	61
Finance and Insurance	52
Wholesale Trade	49
Information	41

Source: U.S. Census Bureau, Nonemployer Statistics, 2003

2. Resource Assessment and Stakeholder Feedback

Unemployment



Greene County's unemployment rate is impacted by a number of factors:

- Access to Albany, local government jobs, and the presence of state prisons help to stabilize the employment base.
- Being a rural area with limited job opportunities and low education levels adds to the unemployment challenge.
- The emergence of new employers in the Coxsackie area has provided significant opportunities for the high school-educated labor force.
- The rise in small businesses has helped to bring down unemployment.
- The lack of significant technology companies has minimized the volatility in unemployment when the economy softens.



2. Resource Assessment and Stakeholder Feedback

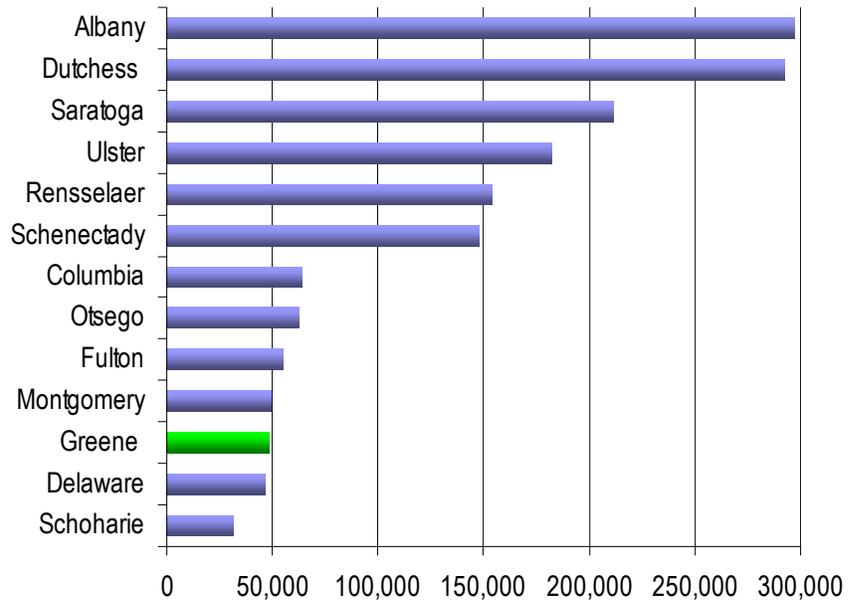
Population and Demographics

CURRENT & PROJECTED POPULATION

Greene County’s population of 48,679 (2000 Census) is consistent with that of other rural counties in the Capital Region and northern Hudson Valley. The rate of growth among rural counties has been similar with a slight increase since the 1970s with the advent of interest in more rural living. The population growth rate projected for Greene County over the next five years is low but positive.

2000 Population by County	
Albany	297,127
Dutchess	292,439
Saratoga	211,129
Ulster	181,647
Rensselaer	153,606
Schenectady	147,704
Columbia	63,894
Otsego	62,334
Fulton	55,049
Montgomery	49,105
Greene	48,679
Delaware	46,699
Schoharie	31,962

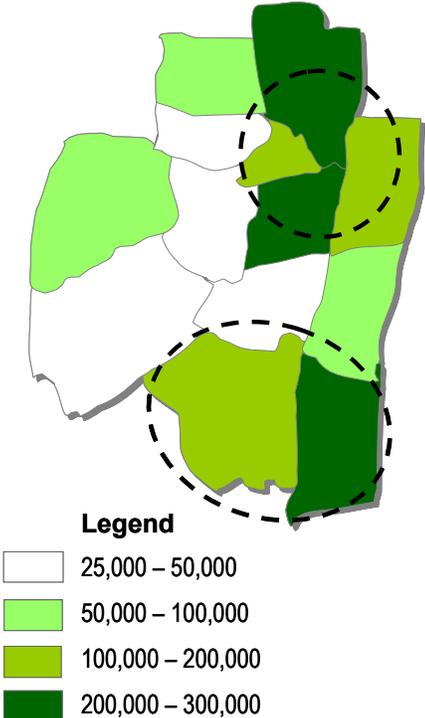
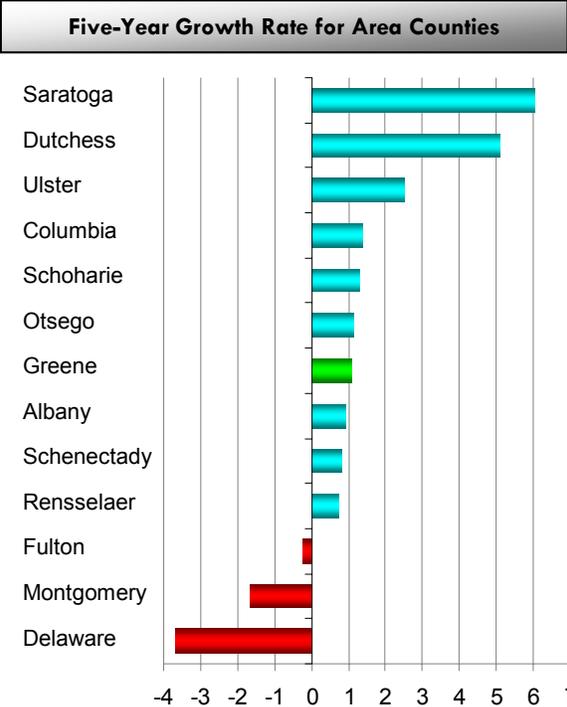
Source: U.S. Census Bureau



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback



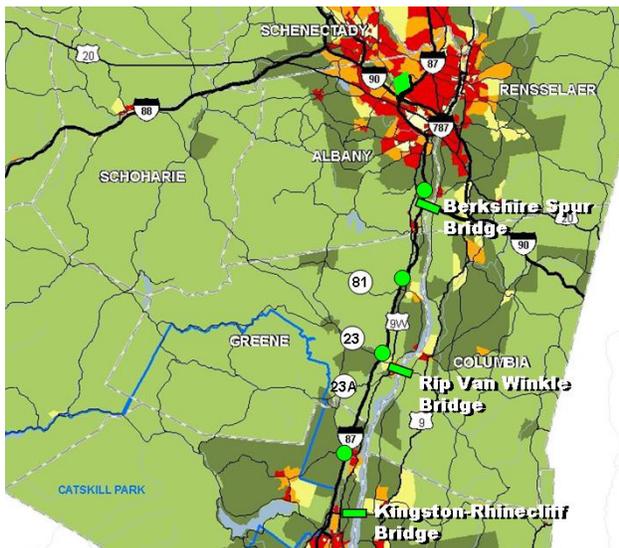
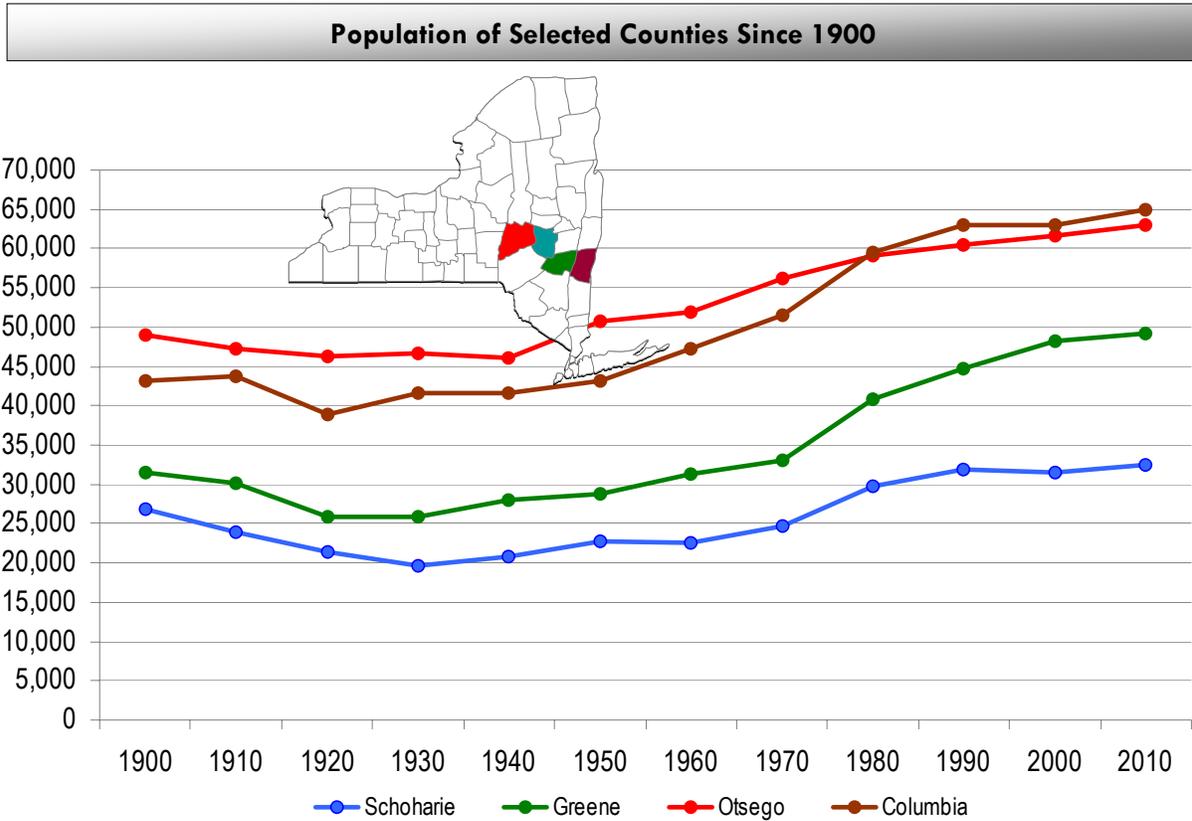
Source: Claritas estimates for 2004



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback



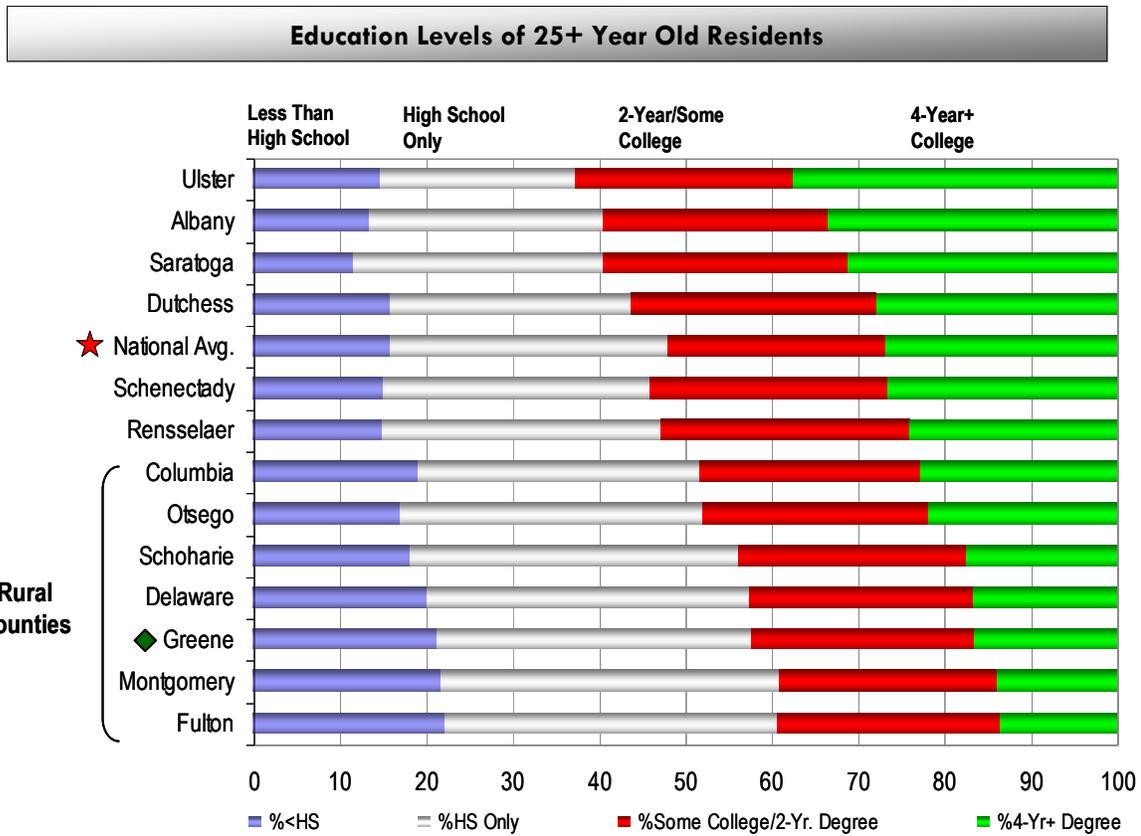
Greene County’s population is concentrated primarily in selected Historic River and Valley Towns. The next largest population centers nearby are the City of Hudson, Columbia County; the City of Kingston, Ulster County; and northern Albany County, including the City of Albany. The limited bridge access over the Hudson River, tolls on the NYS Thruway and commuting distances are a challenge in attracting labor from outside Greene County for positions with lower levels of compensation, however.



2. Resource Assessment and Stakeholder Feedback

EDUCATIONAL ATTAINMENT

Like other rural counties, Greene County has an above-average proportion of residents age 25 and over with no education beyond high school and a below-average proportion of adults with four or more years of college. These demographics do not reflect the educational attainment levels of children who grow up in Greene County, go off to college, and relocate because of the lack of suitable job opportunities and an interest in living in larger metropolitan areas.



Source: Claritas (2004)

Interestingly, although low levels of educational attainment are more prevalent among persons age 65 and over, 21% of 25-to-34 year olds and 18% of 45-to-64 year olds in Greene County lack a

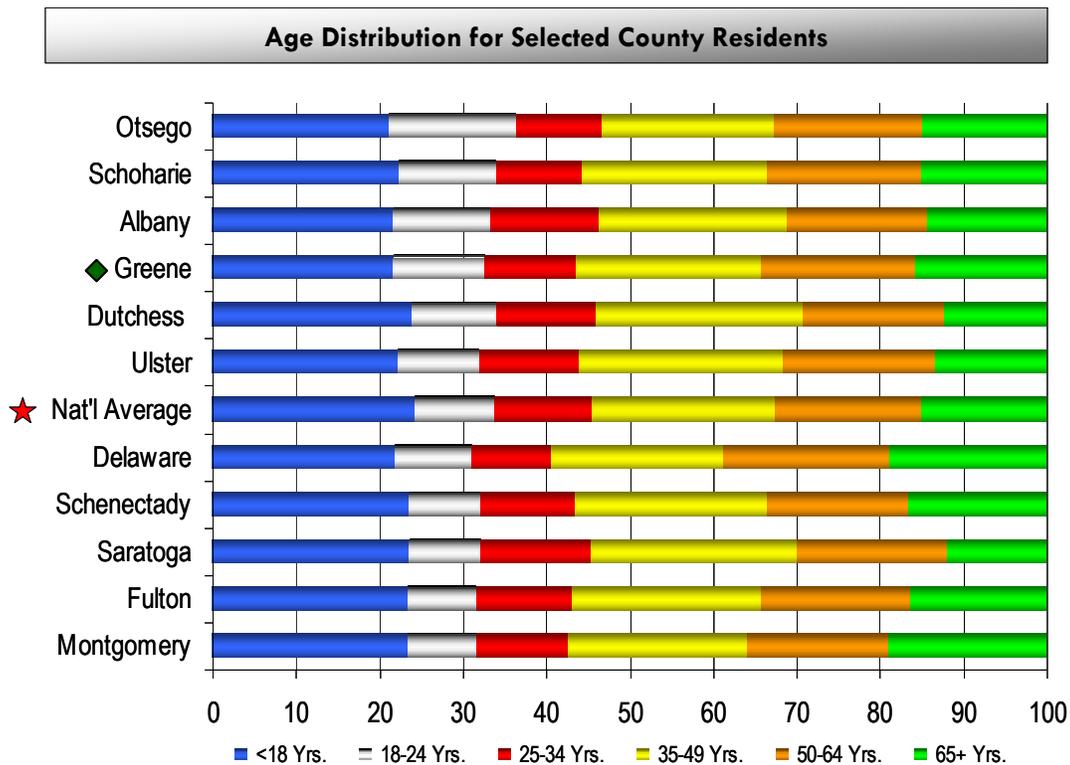


2. Resource Assessment and Stakeholder Feedback

high school diploma. In other words, education levels are not necessarily changing with the younger generation – because the more educated young adults are leaving the County.

AGE PROFILE

Greene County’s age profile tracks close to the national average except that it is 3% lower in the under 18 years old cohort. The County is losing its college-trained 18-24 year olds to major regional cities and other regions due to job opportunities and personal preferences.



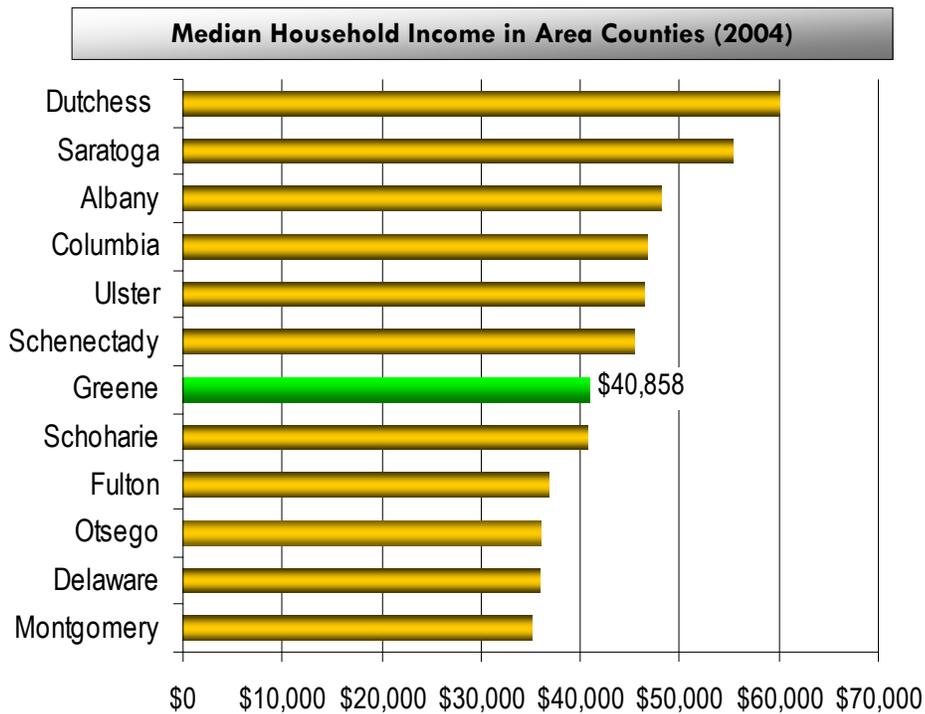
Source: Claritas (2004)



2. Resource Assessment and Stakeholder Feedback

RESIDENT INCOME LEVELS

The median household income level in Greene County is lower than many of the urbanized counties in the region, but higher than the majority of rural counties including Schoharie, Otsego, and Delaware.

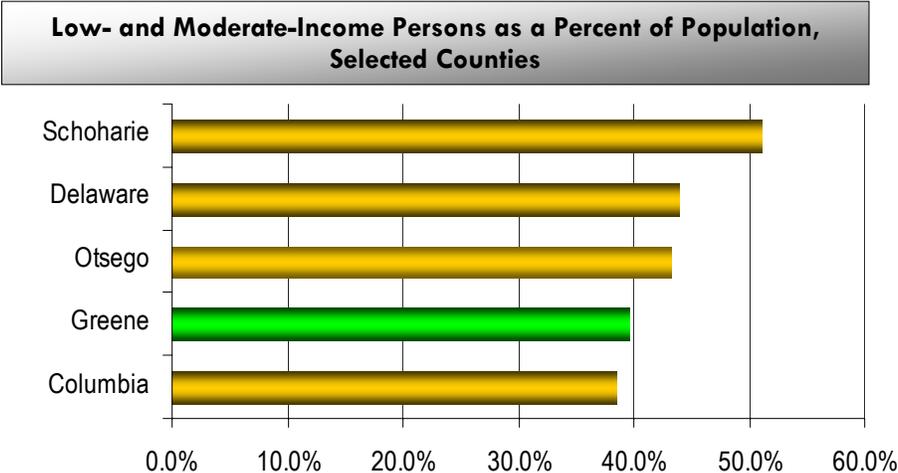


Source: Claritas (2004)



2. Resource Assessment and Stakeholder Feedback

Data from the U.S. Department of Housing and Urban Development indicates that 39.6% of Greene County residents are low- and moderate-income, earning 80% or less of the area median income. Relative to other rural counties in the area, Greene County has a lower proportion of low and moderate income persons.



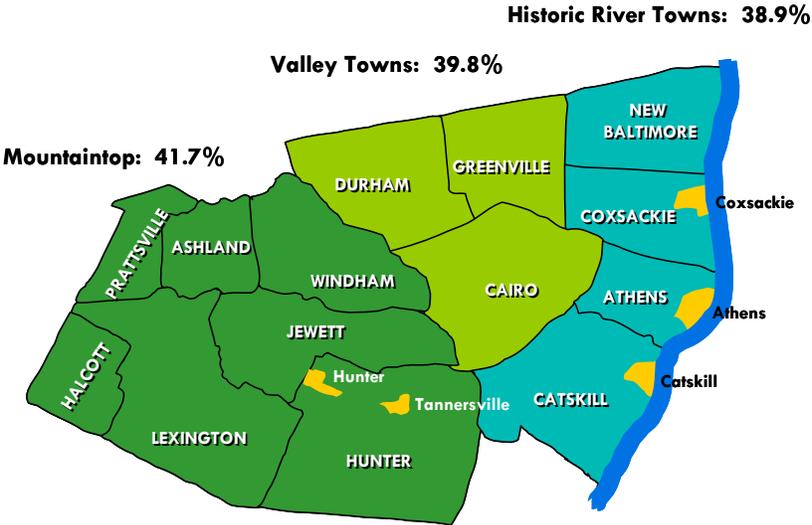
On a subregional basis, the Mountaintop Towns have the highest proportion of low- and moderate-income (LMI) persons, with 41.7% overall. Rates at the municipal level range from 30.5% in New Baltimore to 51.1% in the Village of Catskill. The number and proportion of LMI residents can impact the ability of Greene County and its communities to compete for federal Community Development Block Grant funds available from the Governor’s Office for Small Cities.



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback



Low and Moderate Income Persons As a Percentage of Population	
Municipality	Percent
New Baltimore	30.5%
Jewett	32.5%
Greenville	32.9%
Athens (T)	36.0%
Coxsackie (T)	38.8%
Windham	39.8%
Athens (V)	40.7%
Hunter (V)	41.1%
Durham	42.3%
Cairo	42.4%
Catskill	42.4%
Ashland	43.1%
Halcott	43.5%
Hunter (T)	43.6%
Coxsackie (V)	43.6%
Lexington	45.1%
Prattsville	46.3%
Tannersville (V)	48.0%
Catskill (V)	51.1%

Source: U.S. Department of Housing & Urban Development, 2000





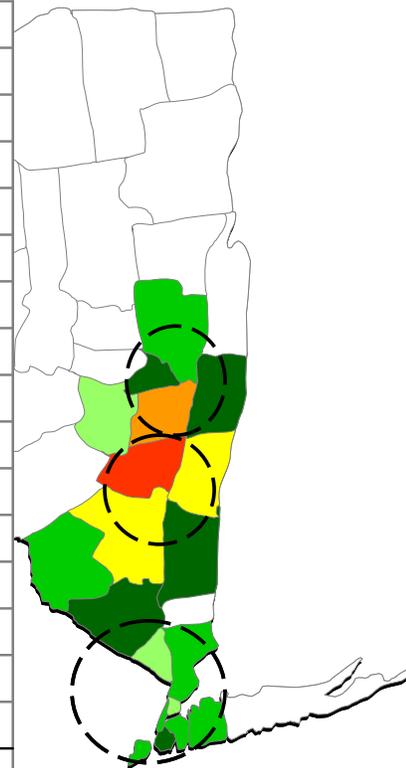
2. Resource Assessment and Stakeholder Feedback

Residence Locations of Greene County Workers

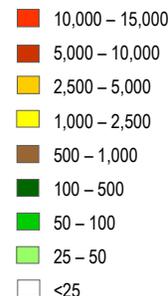
- Journey-to-work data from the 2000 Census indicates that 75% of the Greene County workforce is comprised of residents of the County
- Another 17% commute from the adjacent counties of Albany, Columbia and Ulster
- Demonstrates that the labor draw from the Capitol Region is very limited due to the lack of higher skilled jobs that would attract individuals to commute further

Residence Location of Greene County Workers

Location	1990	2000	Change
Greene Co.	11,784	11,523	-261
Albany Co.	1,176	1,441	265
Ulster Co.	534	575	41
Columbia Co.	617	565	-52
Schoharie Co.	186	251	65
Rensselaer Co.	266	202	-64
All Other	183	156	-27
NYC Area	109	127	18
Schenectady Co.	113	113	0
Delaware Co.	95	92	-3
Saratoga Co.	38	80	42
Dutchess Co.	58	66	8
New Jersey	29	60	31
Warren Co.	5	29	24
Westchester/Orange/Rockland	6	19	13
Total	15,219	15,321	102



Legend



Source: U.S. Census Bureau, 2000



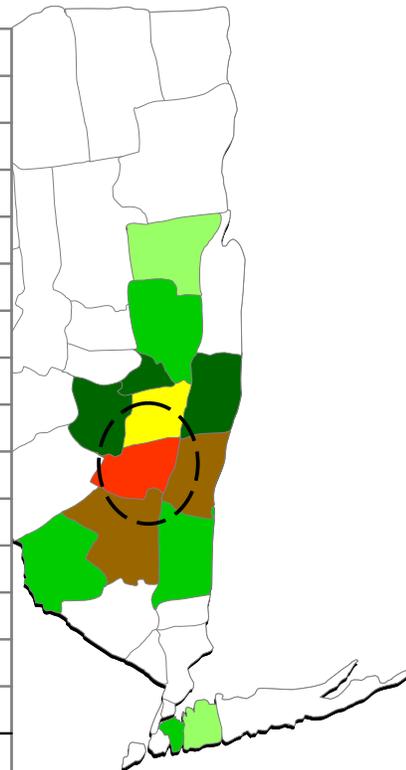
2. Resource Assessment and Stakeholder Feedback

Workplace Location of Greene County Residents

- 58% of Greene County residents remain in the County for employment
- Another 30% commute to the adjacent counties of Albany, Columbia and Ulster
- The New York City and lower Hudson Valley destinations represent individuals who have some type of residency in the County, but may be from the downstate area

Workplace Location of Greene County Residents

Location	1990	2000	Change
Greene Co.	11,784	11,523	-261
Albany Co.	3,309	3,537	228
Columbia Co.	740	1,482	742
Ulster Co.	1,105	1,083	-22
NYC Area	389	622	233
Dutchess Co.	175	405	230
All Other	202	314	112
Westchester/Orange/Rockland	163	276	113
Rensselaer Co.	155	253	98
Schenectady Co.	52	151	99
New Jersey	96	137	41
Delaware Co.	99	87	-12
Saratoga Co.	36	61	25
Schoharie Co.	43	33	-10
Total	18,348	19,964	1,616



Legend

- 10,000 – 15,000
- 5,000 – 10,000
- 2,500 – 5,000
- 1,000 – 2,500
- 500 – 1,000
- 100 – 500
- 50 – 100
- 25 – 50
- <25

Source: U.S. Census Bureau, 2000



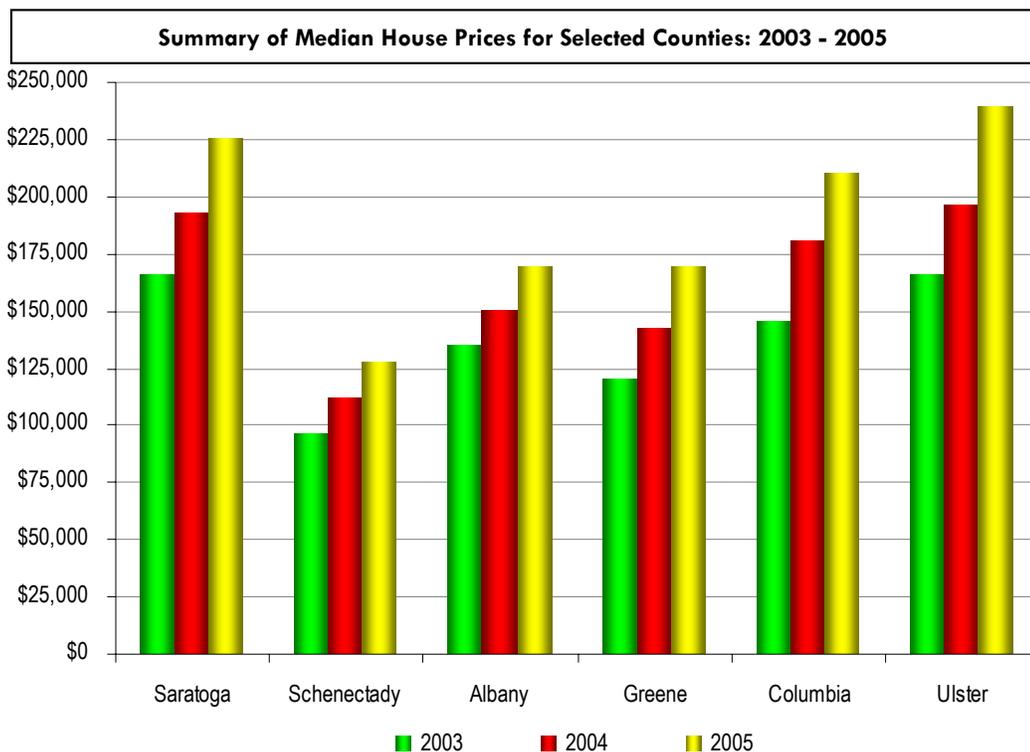


2. Resource Assessment and Stakeholder Feedback

Quality of Life Factors

HOUSING

Greene County's median sales price for a single-family home is escalating faster than Albany County and has caught up to its median price level. The median level is about \$50,000 less than Saratoga County.



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

Summary of House Sales and Median Prices for Selected Counties						
County	2003		2004		2005	
	Sales	Median Price	Sales	Median Price	Sales	Median Price
Saratoga	3,739	\$165,000	3,747	\$192,500	3,670	\$225,000
Schenectady	2,297	\$95,900	2,455	\$111,200	2,773	\$127,700
Albany	3,706	\$134,700	4,130	\$150,000	4,429	\$169,000
Greene	813	\$120,000	989	\$142,500	833	\$169,000
Columbia	870	\$145,000	1,081	\$179,900	977	\$210,000
Ulster	2,356	\$165,800	2,633	\$196,000	2,564	\$239,000

Source: New York State Association of Realtors

PROPERTY TAX RATES

Greene County's property taxes are at about mid-range for the Capital Region, with the Towns of Clifton Park and Colonie being significantly lower. The other point to consider is what type of housing is available at a price point and are they located in a setting (suburban neighborhood vs. small town) that is of interest to potential employees relocating into the county.

Summary of Property Tax Rates for Selected Counties and Municipalities									
County	Municipality	County Tax	Town Tax	Village/City Tax	Other* Tax	Equalization Rate (State)	School Tax	Equalization Rate (School)	Effective Tax Rate Per \$1,000 AV
Columbia	City of Hudson	6.88		15.67		100.0	18.73	100.00	41.28
Saratoga	Town Clifton Park	3.26	0.16			72.5	24.25	80.00	21.88
Greene	Town of Coxsackie	5.45	3.99			87.0	21.98	94.30	28.94
	Town of Catskill	5.58	5.01		1.17	100.0	20.22	96.50	31.27
Albany	City of Albany	3.90		13.29	0.78	85.0	25.49	97.17	40.04
	Town of Bethlehem	5.08	2.32			100.0	27.62	75.17	28.16
	Town of Colonie	4.63	2.41			100.0	20.71	81.42	23.90
Schenectady	City of Schenectady	10.12		20.94		83.0	29.57	100.00	55.35
	Town of Niskayuna	10.95	3.76			71.0	25.76	77.00	30.28
	Town of Glenville	10.08	4.51			74.0	25.21	84.00	31.97
Ulster	City of Kingston	10.08		36.47		36.0	60.73	32.50	36.50

Source: New York State Office of Real Property Services

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

SCHOOL DISTRICTS

Based on the high school graduate rates and the percent of students that go on to a two- or four-year college, the public school data for Greene County school districts reflect an area in which the need for an education is stressed. The challenge is to have the jobs available for those who want to return home after college. The community has placed substantial emphasis on college education while the local economy and the majority of the jobs attracted to the County are for high school-only graduates.

Summary of School Data for Selected Counties and Municipalities							
County	School District	No. of Students	% Seniors Rec. Diploma	% Seniors 2-Yr./4-Yr. College	% Seniors Take SAT	SAT Math	SAT English
Greene	Cairo - Durham	1,813	87%	56% / 29%	50%	505	505
	Catskill	1,817	90%	43% / 30%	75%	520	510
	Coxsackie	1,607	97%	51% / 41%	76%	528	521
	Greenville	1,376	100%	40% / 27%	75%	504	517
	Windham/Ashland/Jewett	512	100%	16% / 71%	80%	517	521
	Hunter/Tannersville	522	100%	19% / 55%	75%	555	525
Columbia	Hudson City	2,207	95%	55% / 32%	33%	494	484
	Chatham	1,501	100%	34% / 46%	65%	548	548
Dutchess	Arlington	11,742	91%	44% / 47%	78%	545	530
	Hyde Park	4,682	84%	42% / 43%	64%	531	536
	Poughkeepsie	4,760	92%	37% / 33%	61%	468	473
Ulster	Kingston	8,197	91%	42% / 39%	70%	520	530
	New Paltz	2,376	94%	26% / 58%	79%	531	543
Otsego	Oneonta	2,167	90%	18% / 76%	89%	545	551
	Cooperstown	1,138	99%	28% / 59%	-	534	530
Schoharie	Cobleskill/Richmond	2,194	97%	14% / 62%	38%	542	539
	Schoharie	1,148	98%	55% / 19%	70%	519	543
Albany	Bethlehem	5,022	96%	20% / 71%	95%	574	563
	Ravena/Coeymans	2,405	97%	40% / 34%	71%	521	539
Saratoga	Saratoga Springs	6,921	95%	24% / 62%	84%	566	543
	Shenendahowa	9,313	97%	25% / 64%	90%	574	560

Source: New York State Education Department

Greene County Comprehensive Economic Development Plan

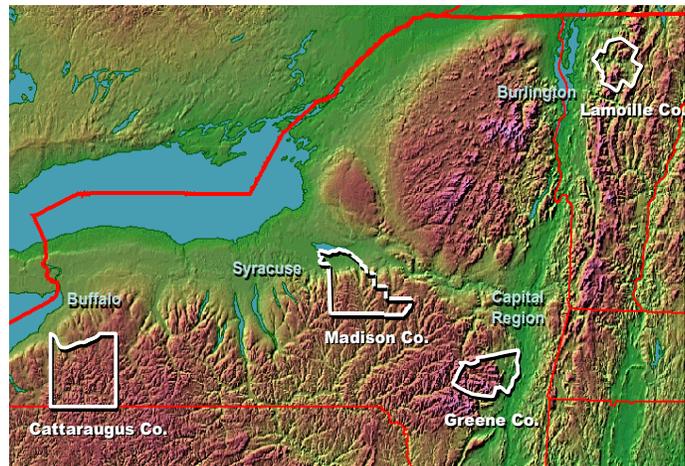


2. Resource Assessment and Stakeholder Feedback

Benchmark Communities

The purpose of the benchmarking effort was to identify comparison communities with attributes similar to Greene County and identify any economic development actions or approaches that might represent an opportunity for the County. Each of the three counties selected for comparison is located just outside a metropolitan area, is in a rural setting, and has similar economic drivers as Greene County. The counties included:

- **Cattaraugus County, NY:** Located just outside the Buffalo metropolitan; has a major resort and ski area in Ellicottville.
- **Madison County, NY:** Located just outside the City of Syracuse in a rural setting.
- **Lamoille County, VT:** Located outside of Burlington, VT; has a major ski resort in Stowe.



	Greene (NY)	Cattaraugus (NY)	Madison (NY)	Lamoille (VT)
Population (2004)	48,680	82,760	69,740	24,320
5-Year Growth Rate	1.10%	-1.91%	0.40%	5.48%
Unemployment Rate (8/05)	4.4%	4.6%	4.4%	2.7%
Median Household Income	\$40,858	\$36,115	\$44,497	\$44,815
Metro Area Access	Capital Region	Buffalo	Syracuse	Burlington
Educational Attainment				
% Less than High School	21.8%	18.8%	16.6%	12.9%
% High School Diploma	36.5%	41.2%	33.2%	30.4%
% 2-Year/Some College	25.7%	25.1%	28.5%	25.4%
% 4-Year College and Over	16.5%	14.9%	21.7%	31.5%
Private/Non-Farm Employment				
Manufacturing	8.0%	22.3%	13.3%	6.7%
Wholesale/Retail	27.9%	21.2%	15.7%	17.1%
Information	2.0%	1.7%	1.4%	1.3%
Professional/Technical Svcs	3.8%	1.8%	3.2%	3.7%
Educational Svcs	0.5%	3.2%	9.4%	1.4%
Health/Social Svcs	9.6%	14.2%	13.9%	14.0%
Arts/Entertainment/Recreation	6.4%	1.4%	0.4%	1.5%
Hospitality	20.6%	14.1%	11.7%	38.8%

2. Resource Assessment and Stakeholder Feedback

CATTARAUGUS COUNTY, NY

Current Economic Situation

- Economy diversified with strong manufacturing base (compressors, cutlery, millwork, resin compounding and paper products)
- Major tourist destinations include Allegany State Park, Seneca-Iroquois National Museum, Holliday Valley or HoliMont ski resorts (near Ellicottville), many other locations for kayaking, biking, equestrian and other outdoor activities
- County has a college and a hospital
- Seneca Allegany Casino opening soon
- County has 1,240 acres of industrial parks and properties under the Empire Zone Program



Challenges

- Job opportunities not at pace with population... losing population
- Average household income is relatively low, but so is the cost of living
- Need to enhance transportation access for industry and tourism
- Want additional destination venues for tourists



Strategy to Enhance Economic Development

- Strong promotion of tourism to western NY, northeastern OH and northwestern PA
- Enhance access through construction of Route 219 four-lane expressway
- Development of recreational trail systems for hiking, biking, snowmobiling, cross-country skiing and horseback riding
- Continue to support microenterprise training and revolving loan program
- Major focus on “Smart Development” for communities with substantial standards and guidelines for community development and revitalization
- Currently under consideration for wind energy farm project
- Significant effort to redevelop brownfield sites throughout the county

2. Resource Assessment and Stakeholder Feedback

MADISON COUNTY, NY

Current Economic Situation

- Over 25% of workforce commutes to surrounding counties (Syracuse/Utica)
- Diverse industrial employment along I-90
- County has three colleges and two hospitals
- Has 20 wind turbines for power generation
- Oneida Indian Nation has strong presence
- Oneida (flatware) eliminating local manufacturing
- Recreation/tourism based on Oneida Lake, 14 smaller lakes, Colgate University and Erie Canal Trail



Challenge

- Want to increase tax base and provide more high value jobs within the county

Strategy to Enhance Economic Development

- Developed five (5) industrial parks with Empire Zone Status and marketing to diverse manufacturing and service (office-based) companies



2. Resource Assessment and Stakeholder Feedback

LAMOILLE COUNTY, VT

Current Economic Situation

- Primary employers are resorts (Stowe, Smuggler's Notch and Trapp Family Lodge)
- Hospital, four-year and two-year colleges
- Strong construction industry from second-home development
- Vermont Studio Center in Johnson is attracting artists from around the country to work their craft
- Some diversified (but small) manufacturing
- Natural landscape important to economy
- Morrisville is the largest commercial center in the county
- Wood products industry under significant market pressure and farming occupies only ~1% of county population...only thriving farms are those that diversify
- Manufacturing jobs being lost to productivity rather than plant closures



Challenges

- Very limited industrial space...what is available is moderate to high cost
- Limited or no incubator space and no R&D or venture capital to stimulate new industries
- Retail is limited . . . must travel to Burlington (~50+ miles away)
- Need for childcare, more cultural opportunities and year-round employment
- Limited availability of skilled/professional workers and work ethic issues in lower level jobs (utilize international students at resorts)
- Guests are staying shorter periods... concerned over being at work
- Incentive package offered by state is very limited...not very competitive
- Cell phone and high speed internet coverage is very limited/spotty in the county
- Local culture not conducive to radical changes in processes needed to be competitive
- Need for more affordable housing for service industry employees



2. Resource Assessment and Stakeholder Feedback

Strategy to Enhance Economic Development

- Business retention and attraction efforts
- Business incubator to help diversify the economy
- Generate financial resources to support business start-ups and job retention
- Workforce development and training
- Increase the “readiness” of community infrastructure (transportation, utilities, trails, quality of life, solid waste management, etc.)
- Reduce permitting process cycles
- Enhance overall quality of life (shopping, healthcare, education, etc.)
- Housing for broad range of income levels

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

SWOT Analysis

STRENGTHS	<ul style="list-style-type: none"> ▪ Natural beauty and historical heritage... uniqueness of county ▪ Access to transportation (interstate, rail, river and air) ▪ Proximity to NYC and Capital Region ▪ Competitive cost of labor and land ▪ Success in Coxsackie/New Baltimore industrial parks ▪ Safe communities
WEAKNESSES	<ul style="list-style-type: none"> ▪ Limited labor supply (qualified high school grads with access to river town areas) ▪ Limited jobs for two-year and four-year college graduates... for children to “come home” ▪ Significant properties off tax roles, particularly on the Mountaintop ▪ Limited zoning and planning... results in mixed signals ▪ Run-down properties reflect negatively on community perceptions/self image ▪ Quality of life challenges (low educational attainment, minimal health care, housing, child care, shopping, minimal year-round indoor facilities for organized sports, etc.)
OPPORTUNITIES	<ul style="list-style-type: none"> ▪ Manage growth of relocations of residents from Capital Region and NYC due to building moratorium in adjacent Albany towns and high cost of housing in Hudson Valley... particularly second-home owners ▪ Continue to support small business and entrepreneurial growth ▪ Continue to leverage industry base but address labor supply issues ▪ Attracting industries requiring four-year graduates is a potential but will take time ▪ Become more aware of industries that can support tech businesses in Tech Valley ▪ Leverage art/culture heritage to build an artists presence ▪ Leverage tourism and resorts industry to address changing markets ▪ Build more multi-use trails for bikes, snowmobiling, horses, etc. and prepare trail maps and related information to promote tourism
THREATS	<ul style="list-style-type: none"> ▪ Lack of planning/zoning shifts control to outside developers ▪ Address the “fear of success” that is anti-growth... get everyone on the same page ▪ Competition for tourist options (regionally, nationally, globally) ▪ Inability to enhance education base (reduce less than high school education attainment)

2. Resource Assessment and Stakeholder Feedback

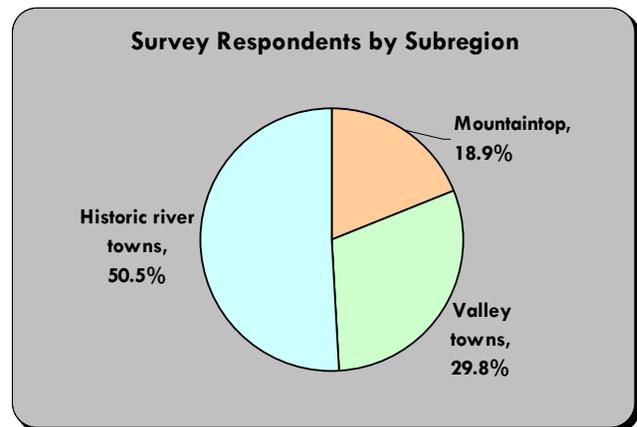
Consumer Preference Survey

What are the views and concerns of Greene County residents regarding economic development? To obtain broad public input on economic development issues in the County, a brief online resident survey, designated as the Consumer Preference Survey, was conducted early in the planning process. Participants were not required to provide their name and address, but were asked to indicate where they reside so that their comments could be sorted by subregion (Historic River Towns, Valley Towns, Mountaintop Towns).

The survey was made available for completion on the Internet, via the GreeneBusiness Partnership website, beginning in August 2005. To make residents aware of the project and encourage them to participate in the online survey, postcards were mailed to every household in the County. In addition, the Greene County Department of Planning & Economic Development (GCDPED) and the Greene County Chamber of Commerce printed, copied and distributed survey forms at senior centers, libraries, and other locations to allow people without access to the Internet to complete the survey as well.

RESPONDENT CHARACTERISTICS

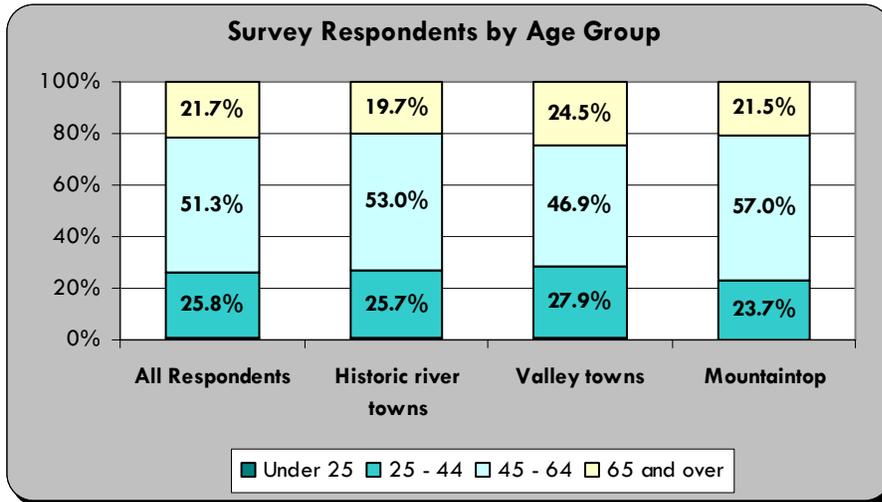
Nearly 500 responses to the consumer preference survey were submitted, 379 of them online. The respondents represent a broad cross-section of Greene County residents. As shown in the chart at right, more than half of the respondents live in the Historic River Towns, 29.8% in the Valley, and 18.9% on the Mountaintop. In comparison, 58.4% of the County's overall population lives in the Historic River Towns, 25.4% in the Valley, and 16.2% on the Mountaintop, according to the 2000 Census.



Most of the survey respondents have lived in Greene County for a long time, and are therefore likely to have a thorough understanding of County issues. The term of residency averaged 26.5 years, with a range of six months to 95 years; the median residency was 22.0 years.



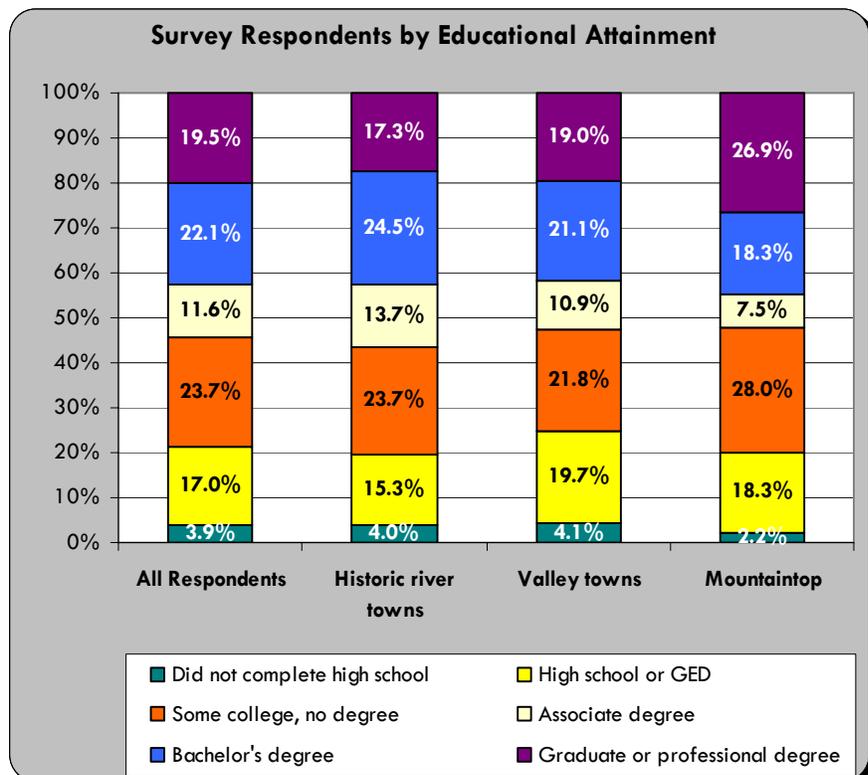
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The characteristics of survey respondents by age are shown in the chart at left. Although participation by individuals under age 25 was marginal, less than one percent in all areas, the respondent pool includes residents from a variety of age groups. A comparison between the age of the respondents and the age of adult residents in Greene County suggests that the 18-24 and 25-44 age

groups are underrepresented (comprising 12.4% and 35.1%, respectively, of the adult population), while the 45-64 age group (comprising 32.2% of the adult population) is overrepresented among respondents to the survey. Individuals aged 65 and over make up 20.3% of the County's adult population and 21.7% of respondents.

Well-educated residents are overrepresented among the survey respondents in relation to the general population. To some extent, this may reflect participation in the survey by seasonal homeowners. Asked to indicate their highest level of educational attainment level, 22.1% of the respondents said that they have a bachelor's degree, while nearly 20% have a



Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

graduate or professional degree. In comparison, Census data indicate that just 16.4% of Greene County residents aged 25 and over have a bachelor's degree or higher. This finding is not unexpected, however, as rates of participation in these types of surveys are often correlated with educational attainment.

REASONS FOR LIVING IN GREENE COUNTY

The first subjective question on the consumer preference survey asked the respondent to identify the factors most important in their decision to live in Greene County. A list of possible choices was provided, although a minority wrote in other answers.

The responses suggest which characteristics are viewed as positives in Greene County. According to the respondents, scenic views and natural beauty, rural/small town character, and the quality of life are the most important reasons for living in Greene County. Other popular responses include closeness to family members and friends, growing up in the County, housing costs, and low crime rates. Interestingly, few respondents cited proximity to employment opportunities as a reason for living in Greene County. This suggests that quality of life factors take precedence over work-related factors in attracting people to live in the County.

Most Important Reasons for Living in Greene County				
	All Respondents	Historic river towns	Valley towns	Mountaintop
Scenic views and natural beauty	58.0%	56.2%	58.5%	63.4%
Rural/ small-town character	50.1%	51.0%	51.0%	47.3%
Quality of life	46.9%	43.4%	49.7%	53.8%
Close to family and friends	34.7%	38.6%	32.0%	28.0%
I grew up here / have always lived here	26.8%	29.7%	27.2%	19.4%
Housing costs	23.7%	30.5%	21.8%	9.7%
Low crime rate	22.7%	24.1%	20.4%	23.7%
I work in Greene County	18.1%	17.7%	15.6%	23.7%
Recreational opportunities	18.1%	16.9%	14.3%	26.9%
Quality of schools (K-12)	11.4%	9.6%	14.3%	11.8%
Close to New York City metro area	9.1%	8.8%	8.8%	10.8%
My business is located in Greene County	8.9%	7.6%	10.9%	9.7%
Close to employment opportunities	6.3%	8.4%	3.4%	5.4%

Note: Respondents were asked to check all that apply. "Other" responses excluded from table.

A review of responses by subregion reveals little variation among residents from Historic River or Valley Towns. However, Mountaintop residents tend to place greater emphasis on scenic views and

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

natural beauty and the quality of life, as well as recreational opportunities. They are also less likely to select housing costs as a factor.

ECONOMIC DEVELOPMENT STRATEGIES

This question asked the respondent to indicate their level of support for a range of possible approaches to, or strategies for, economic development in Greene County. Of the 11 items listed, the three that received the most support are “Promote the renovation and reuse of vacant commercial and industrial buildings” (60.9% said they strongly supported this approach), “strengthen workforce education and training programs” (55.8% strongly support), and “revitalize historic Main Street commercial districts” (54.8%). Residents also strongly favor encouraging new start-up businesses, recruiting new businesses, and enhancing the tourism sector in Greene County.

Level of Support for Various Approaches to Economic Development (All Respondents)					
	Strongly Support	Support	Oppose	Strongly Oppose	Not Sure/ No Opinion
Promote the renovation and reuse of vacant commercial and industrial buildings.	60.9%	26.0%	2.6%	1.2%	6.3%
Strengthen workforce education and training programs.	55.8%	31.6%	1.2%	1.0%	6.7%
Revitalize historic “Main Street” commercial districts.	54.8%	28.4%	3.2%	1.8%	8.1%
Encourage new start-up businesses by County residents.	53.8%	34.3%	1.2%	1.0%	6.5%
Recruit new businesses/ industries to Greene County.	51.9%	27.4%	6.9%	3.0%	7.9%
Expand the tourism sector through marketing of County tourist attractions and amenities.	45.2%	30.6%	4.7%	2.0%	13.4%
Help existing businesses grow and expand.	43.8%	40.4%	2.6%	0.8%	9.3%
Provide incentives for businesses that create additional job opportunities.	41.8%	39.6%	4.3%	1.2%	9.7%
Develop new business and industrial parks.	36.9%	27.4%	6.1%	8.7%	27.4%
Expand public water and sewer infrastructure to areas not currently served.	30.4%	25.4%	9.1%	4.1%	27.4%
Encourage large-scale retail development.	26.8%	23.7%	14.6%	15.2%	15.4%

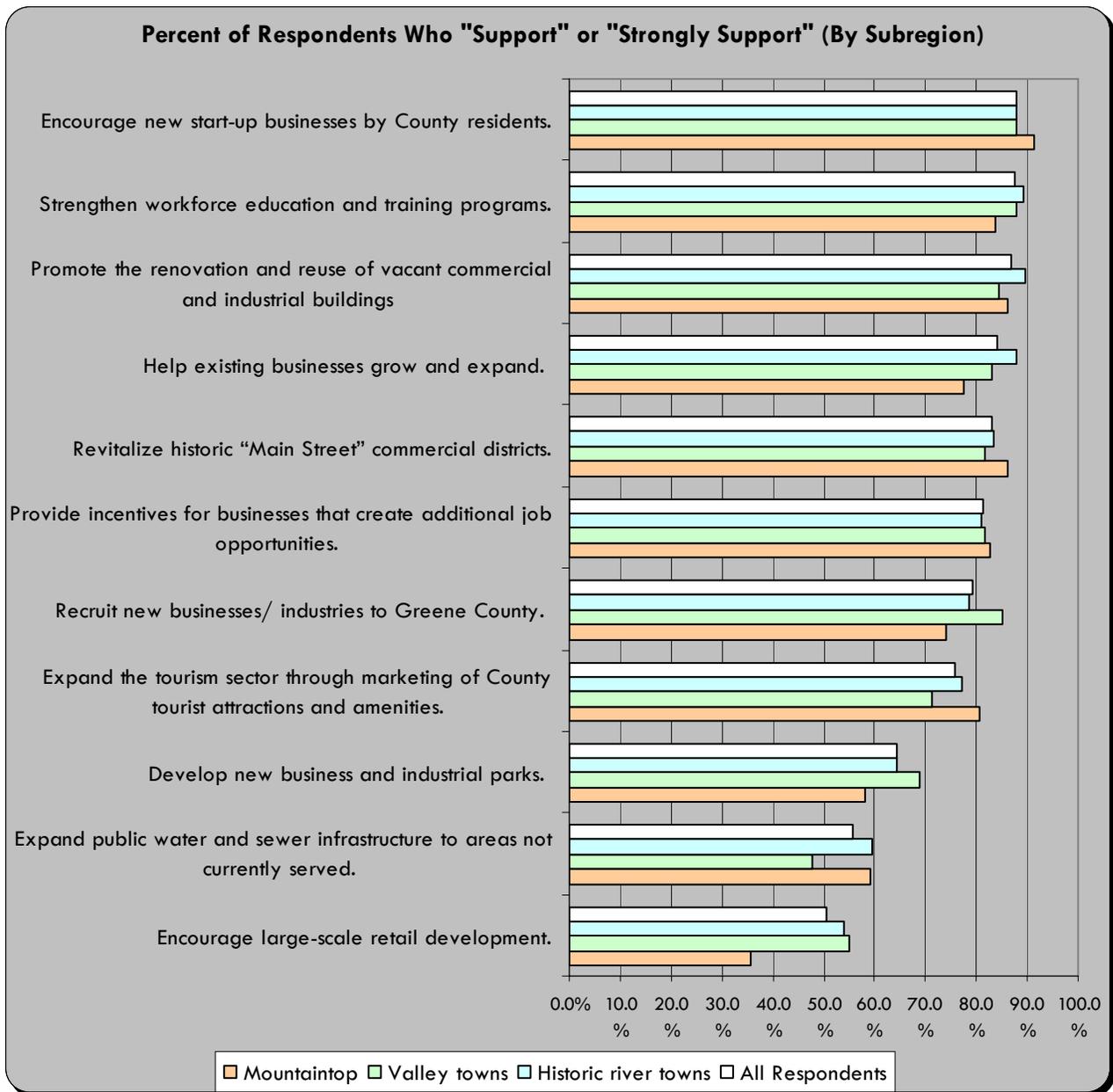
Percentages may not add up to 100% due to non-responses.

There was far less support and consensus, however, with regard to encouraging large-scale retail development, or expanding public water and sewer infrastructure to areas not currently served. In fact, 28.2% of respondents either oppose or *strongly* oppose large-scale retail development, the most of all the choices listed. And more than one-quarter of residents were uncertain about whether the County should develop new business and industrial parks or expand public infrastructure. These responses suggest that the County should proceed with caution, or avoid pursuing such strategies altogether, in the context of the Comprehensive Economic Development Plan.

Greene County Comprehensive Economic Development Plan



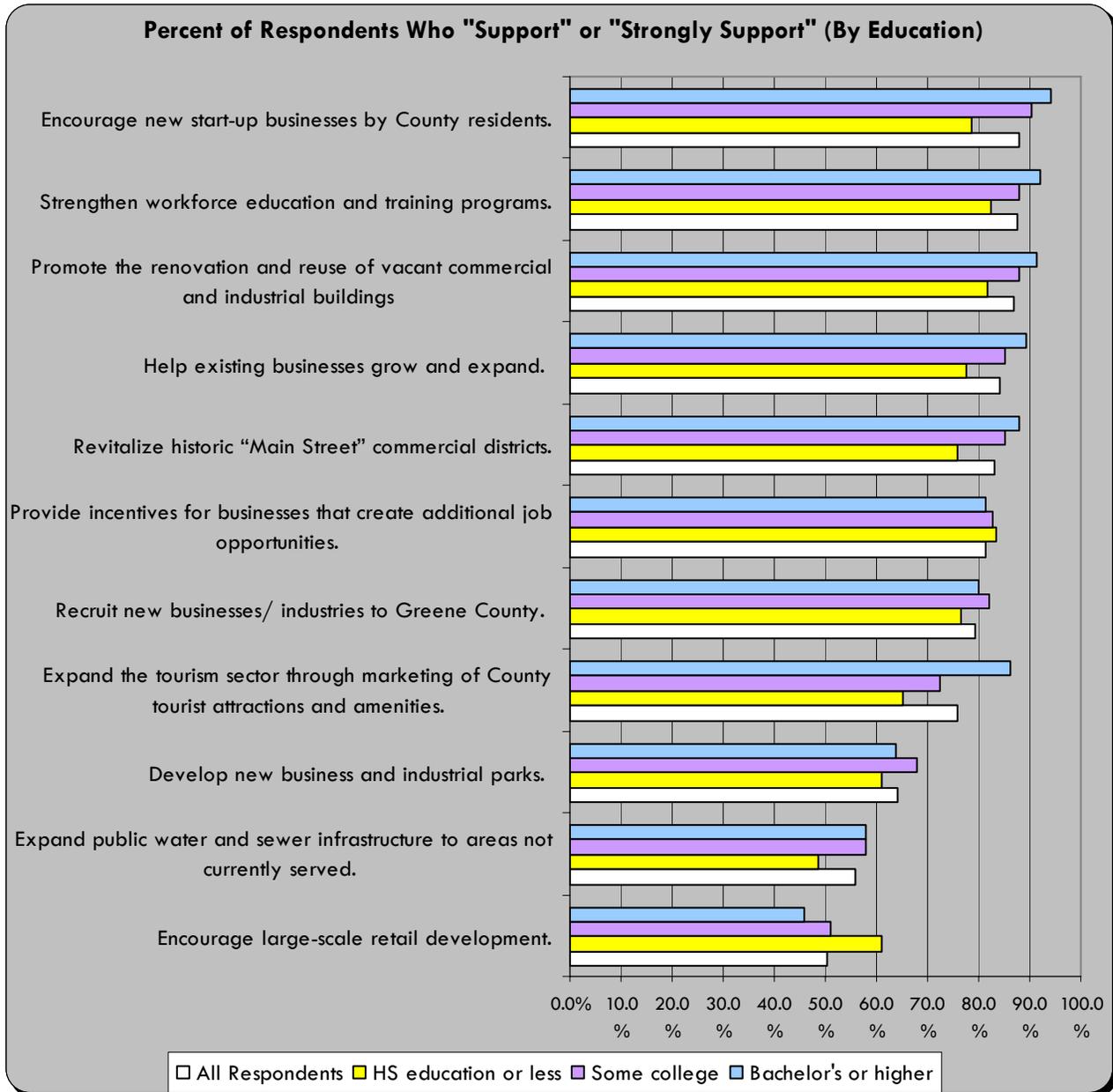
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Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback





2. Resource Assessment and Stakeholder Feedback

The charts on the previous pages break out the responses based on the subregion or educational attainment levels of the survey respondent. For the most part, residents from the Historic River Towns, Valley Towns, and Mountaintop agree on their support for new business start-ups, building renovation and reuse, workforce education and training programs, and Main Street revitalization. There was one notable difference by education, however: Residents with a high school education or less were much more likely to support large-scale retail development, perhaps because of the potential for job creation or opportunities for more affordable consumer goods in Greene County.

PERSPECTIVE ON ECONOMIC GROWTH

The next question on the consumer preference survey asked residents to select the statement that best reflected their perspective on economic growth in Greene County:

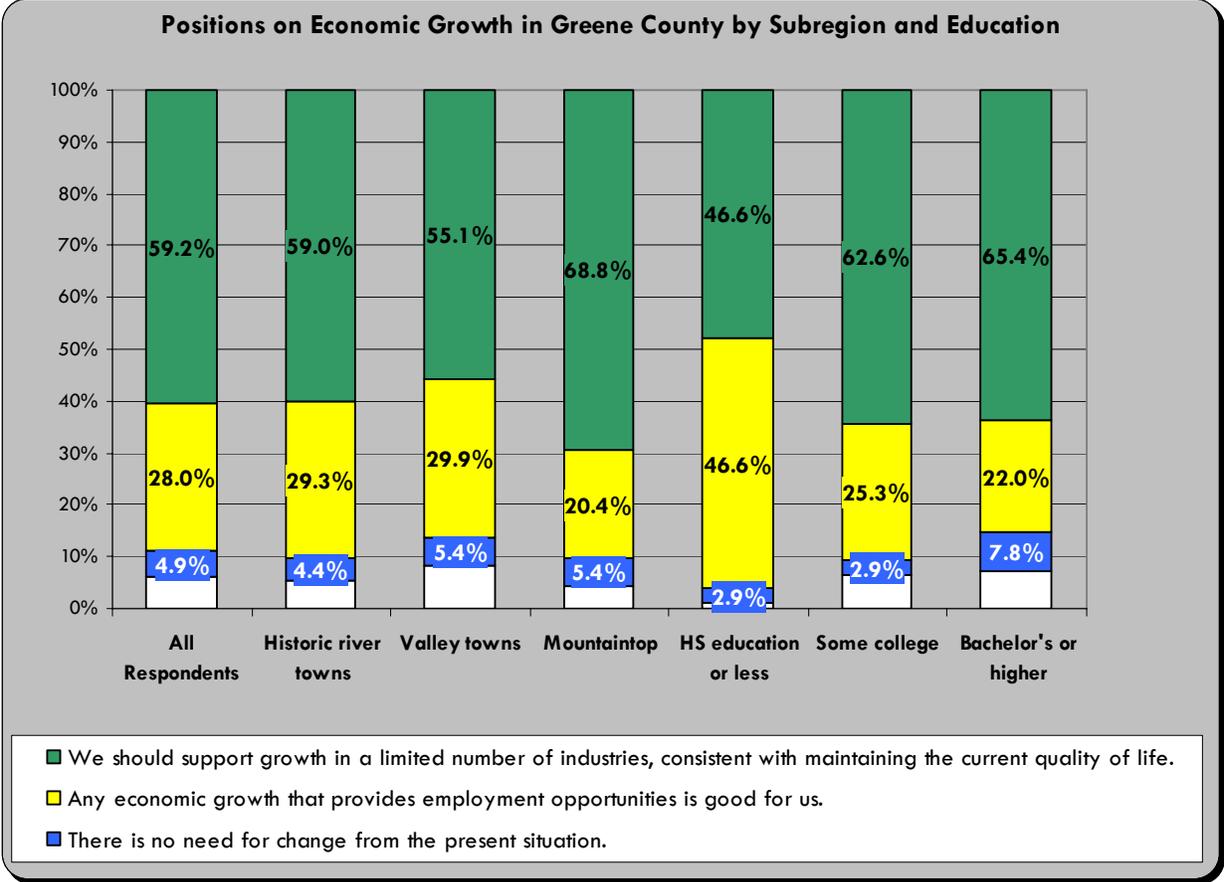
- There is no need for change from the present situation.
- We should support growth in a limited number of industries, consistent with maintaining the current quality of life in the County.
- Any economic growth that provides employment opportunities is good for the County.

Overall, 59.2% of the respondents indicated that the County should support limited economic growth to protect the existing quality of life, while 28.0% advocated for any economic growth that would result in job creation (see chart on following page). Few residents favored a status quo approach. Mountaintop residents and individuals with bachelor's degrees or higher were more likely to favor limited economic growth.

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback



2. Resource Assessment and Stakeholder Feedback

ADDITIONAL COMMENTS

The consumer preference survey gave respondents an opportunity to provide additional comments regarding economic development in Greene County. Comments were received from more than 225 people, or about half of the residents participating in the survey. Although some of the remarks were lengthy, they were nevertheless impassioned and articulate, covering a wide range of topics. Several common themes emerged:

- Concerns about balanced growth and responsible development;
- The desire to maintain Greene County's rural character and prevent the County from becoming "suburbanized";
- The need for more job opportunities, in general and/or for those with college degrees;
- Requests for more retail and essential services, with a decided emphasis on *small-scale* (as opposed to *big box*) shopping opportunities; and
- Pleas for the County to "do something" about junkyards and abandoned cars.

Examples of these comments are provided below.

"Balance industrial development with tourism and small businesses - to maintain the landscape's beauty and integrity... Too many industrial parks, factories & pollution-causing industries can ruin our area's drawing cards - historical and cultural significance, ecological beauty, clean & safe places to live... And once those assets are destroyed, we can't get them back..."

"Greene County is a great place to raise a family but there are not a lot of opportunities for college graduates. There is a limited number of jobs and in this area the pay scale is at poverty level. There are no 'quality' jobs available. That is what keeps people away from our area."

"I do not support industrial development solely for the sake of development. However, I am in strong support for smart development that is environmentally and aesthetically responsible. Our area is truly beautiful and we must do whatever we can to keep it that way. Clean, 'low-rise' industries are our best bet..."

"I would like the County to promote and encourage business development that will maintain the rural nature of the county and at the same time raise the wage base. This hopefully, will encourage young adults to settle and raise families in Greene County..."

"It is extremely important [that] all aspects of life be considered before new industries are brought in, or housing developed. Greene is rural. We don't live in Delmar or Kingston for good reason!!"

"There is nothing shameful in being a rural county. It is what attracts people to visit the natural beauty, to get away from the maddening crowd and some to buy real estate if they can afford it... All of us will lose if we pursue quick ways to convert our county into cash, for we will have sacrificed the very thing that

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

attracted others to us and it will be lost forever, and that is too high a price to pay for growth... Greene County: Handle with care."

"We need shopping, restaurants, movie theaters and something for kids/teens to do, as well as grown-ups."

"While I value tourism and the types of specialized businesses it brings to our quality of life, as well as the convenience of big businesses, I greatly value maintaining a township that is not over-touristed or too focused on monster-stores. It is important to strike a balance between drawing income from residents and visitors and maintaining the environment that has attracted many of our current residents to this area to stay..."

"...I would like Greene County to remain rural, quiet and scenic. Not interested in living in the suburbs, I yet understand growth is imminent and would only hope it to be done tastefully, with respect to its rural beauty and all that encompasses."

"Commercial/industrial development should be promoted near Thruway and 9W. Tourism should be promoted in the mountains/Valley. No large malls anywhere. Revitalize Main Streets. Promote small businesses, restaurants, small shops in the hamlets. Always take measures to prevent residential sprawl."

"Greene County should have a plan for growth and maintain the beauty of the environment... If the county wants to encourage positive growth they must do something about all of the junk cars, trash, falling down buildings..."

"I'm all for growth and development of the County but not at the expense of the rural and historic character of the area. I believe that we should be more tuned into weaving our rich historical background into our growth pattern. We don't want to lose the atmosphere that has brought people here for hundreds of years. But we must have the future in mind also..."

"One major problem that we have lived with for so long is the unavailability of stores in our area. We travel 35 minutes plus for simple thing like shoes, socks, craft supplies, clothes, etc. We have an ample supply of banks and gas stations. A huge deterrent from anyone buying in this area is the distance to shopping. With the closing of the Ames Department store in Greenville, life has been rough. I am even considering leaving the area."

"...We do need diversity in employment here. Big boxes, I believe are not the answer because they are at odds with our natural beauty / historic based tourism. People from New Jersey won't want to come here if Greene County starts to look like New Jersey. When development does happen, it should be in the most thoughtful way. Encouraging best practices, learning from development efforts in other areas that communities feel are successful. My preference is to support locally owned businesses that are responsive to local communities..."

"...The children in the family unit are (believe or not) the main decision makers in where [to go on] family vacations. If you market the area as with this in mind, you not only capture the family market but are rewarded with a full lifetime of revalidation opportunities. I strongly encourage Hunter Mtn to reconsider bringing back nightskiing and adding (updating) the amenities to cater to the age group from 8 to 18 years of age..."



2. Resource Assessment and Stakeholder Feedback

Regional Public Workshops

Three public workshops were held during the first week in October 2005 to introduce the economic development planning process and present preliminary information on trends and issues that impact economic development in Greene County and the region. In addition, meeting participants were given an opportunity to identify what they perceive as the strengths, weaknesses, opportunities, and threats to economic development (SWOT) and to describe their vision for the local economy over the next 10-20 years. The following is a summary of the SWOT analysis and visioning exercises at each of the public workshops. The numbers in parentheses reflect the results of a voting process at the conclusion of each meeting; participants were given 8 colored stickers/dots to vote for any of the strengths, weaknesses, opportunities, and/or threats that they felt were most important. In some cases, individual responses were grouped into categories.

Overall, the results of the public workshops reveal a number of common threads: concerns about community appearance and poorly maintained properties; the lack of affordable housing identified as a weakness; the need for careful planning to protect the County's natural beauty. Residents from all three subregions acknowledged the County's strengths as its natural and cultural resources, low cost of living, and location, with excellent transportation access by road, river, and rail. There was more variation with respect to opportunities for economic development. While Catskill meeting participants focused on cultural assets and shovel-ready business parks, those attending the Hunter meeting identified opportunities associated with small business development, telecommuting, and stronger promotion of existing assets. In considering their vision of the future, participants at all three public meetings expressed their hope that Greene County will have a diverse economy with well-planned development and an appropriate balance between economic development and conservation.

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

Historic River Towns Meeting¹

STRENGTHS	<ul style="list-style-type: none"> ▪ Physical beauty (29 votes): river, mountains, tourism, awareness, pristine & preserved, creek ▪ Cultural heritage (27): quality of life, art galleries – resorts, Hudson River School of Painting, first art organization, uniqueness ▪ Access and transportation (15): Thruway, bridges, river, railroad ▪ Low cost (7): taxes, cheap land, low cost of living ▪ Agriculture (7): ginseng, tourism
WEAKNESSES	<ul style="list-style-type: none"> ▪ Poorly maintained properties & absentee landlords / lack of code enforcement (e.g., along Route 9W corridor) / streetscapes, building aesthetics (17 votes) ▪ Quality of education – academic and trades (12) ▪ Lack of affordable housing relative to wages (12) ▪ Exporting of better educated residents due to lack of job opportunities (11) ▪ Lack of incentive to improve property; taxes just go up (9) ▪ Lack of access to health care services (9) ▪ Lack of suitable commercial land with infrastructure (6) ▪ Lack of public transportation for seniors and workforce (4)
OPPORTUNITIES	<ul style="list-style-type: none"> ▪ The County’s cultural heritage and interest (12 votes) ▪ Historic building stock (9) ▪ High-tech – we’re the only county to have shovel-ready business parks (7) ▪ Areas for waterfront revitalization and businesses (6) ▪ Proximity to New York City and Boston (5) ▪ The 9/11 effect – relocation and business development (3) ▪ Greater interest in the cultural heritage of the Hudson Valley & Hudson River (3) ▪ Film & arts festivals in adjacent counties (3) ▪ Casinos in the Catskills – NYS interest and support (3) ▪ Recreational opportunities (3) ▪ Demand for medical care - don’t have to go to Albany (3) ▪ A technical school or college (2) ▪ Good modes of transportation: highway, river, rural bus, rail (2) ▪ Cost of housing – still affordable compared with Ulster & Columbia Counties (2)

¹ Held at Catskill High School, October 3, 2005. To save space, responses that received fewer than 2 votes are not shown.



2. Resource Assessment and Stakeholder Feedback

THREATS	<ul style="list-style-type: none"> ▪ Development from outside without planning (20 votes) ▪ Loss of students - “brain drain” (12) ▪ Loss of farmers and farmland (8) ▪ Loss of open space, scenic views (8) ▪ Energy costs (5) ▪ Loss of / lack of health care (5) ▪ Land use conflicts/environmental groups (4) ▪ Lack of affordable housing (3) ▪ State/local government (2) ▪ “Fear of success” – resistance to change (2)
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VISION ELEMENTS FOR HISTORIC RIVER TOWNS
<ul style="list-style-type: none"> ▪ Business without ruining landscape ▪ Green business – alternative fuels ▪ Increased openness and trust ▪ “Planned it out and did it right” ▪ Diversity of business - not eggs in one basket ▪ Capitalize on cultural heritage – marketing asset & natural environment ▪ Art & nature ▪ “80% of students go on to college and return to Greene County” ▪ Preservation of diversity (not like Hudson) ▪ Encourage and support local agriculture, food supply ▪ Preserve beauty of the County as an asset - don’t destroy it to industrialize – use physical aspects as basis for growth ▪ Use the resources we have to bring in what we need – rail? ▪ Go beyond tourism for better wages – high tech ▪ Well-planned development ▪ Get <i>what we want</i> – not runaway growth ▪ Sole proprietorships thriving, sharing services, encouraged by county ▪ “Delicate balance” with smart growth ▪ Improved public transportation ▪ Tourism industry as training opportunity for young people ▪ Renaissance of painting – new artistic renaissance
SUMMARY: VISION THEMES
<ul style="list-style-type: none"> ▪ Diversity ▪ Smart growth ▪ Balance ▪ Beauty ▪ Well-planned development ▪ Getting young people to come back

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

Valley Towns Meeting²

STRENGTHS	<ul style="list-style-type: none"> ▪ Natural beauty (19 votes): Quality of life, quiet and peaceful, open/green space, scenery, vistas, topography, water, mountains and rivers, attractive, diversity, hunters/fishers/birders, positive impressions ▪ History (13): Architectural/housing stock, story of the county, old houses – stone walls, traditional main streets, stability, attraction of people ▪ Proximity and transportation (11): Roads and interstate, river, trains, strategically located – two cities, hub, labor force, manufacturing, access to jobs, tourism ▪ Clean air and water (6) ▪ Education (6): elementary, small class sizes – especially in Greenville ▪ Cost of living (4): Cheaper housing, electric, taxes, labor
WEAKNESSES	<ul style="list-style-type: none"> ▪ Poor image (28 votes): appearance, welfare retirement communities ▪ Lack of community direction / lack of leadership (23): What are we? Lack of consensus, no road map, fear of change ▪ Job preparedness (21): education, what are our goals, what are we educating them for ▪ Lack of public transportation (4) ▪ Lack of tourism support & recognition – not listening to what we are saying (3)
OPPORTUNITIES	<ul style="list-style-type: none"> ▪ Elections – new leadership (13 votes) ▪ Outlet stores – people will travel here if they were built; closest outlet malls are in Vermont, Orange County, NY, and Massachusetts (11) ▪ Small schools with more direct interaction with students (10) ▪ Dayliner may return to Catskill Point (9) ▪ Opportunity to clean up areas of county – provide incentive to clean up (8) ▪ Opportunity for growth in IT – capacity – technology – development (6) ▪ Natural areas – opportunity for trail maps to be distributed (5) ▪ Vacant industrial and commercial buildings that could be renovated (4) ▪ Opportunity for schools to provide technical training, workforce training (3) ▪ Need passenger train on this side of the river to connect to NYC (3) ▪ Ulster County getting built-out and Columbia County getting expensive (2) ▪ Revitalization of older resorts for accommodations and dining (2)
THREATS	<ul style="list-style-type: none"> ▪ Taxes (15 votes) ▪ “Overbuilding” – loss of natural assets (12) ▪ “Is the enemy us?” (12) ▪ Not-for-profit groups (9) ▪ Property value changes (2)

² Held at Emergency Services Building, October 6, 2005. To save space, responses that received fewer than 2 votes are not shown.



2. Resource Assessment and Stakeholder Feedback

VISION ELEMENTS FOR VALLEY TOWNS
<ul style="list-style-type: none"> ▪ More business ▪ Leadership wake-up ▪ Cell phone service ▪ Neater appearance ▪ More tourism attractions ▪ Determine how much water is available for growth – don't outgrow resources ▪ Well-planned county and individual towns ▪ Don't want to be overrun with development and people ▪ High speed internet for all ▪ Natural beauty ▪ Revitalized buildings and downtowns ▪ Informed citizenry ▪ Leadership for implementation ▪ Reliable phone service ▪ Reliable electrical service, well-maintained ▪ Upgraded communications capabilities in general ▪ Architectural standards and landscaping for industrial buildings ▪ Better intermunicipal communications ▪ More family & kids' activities ▪ Coordination of tourism promotion ▪ Revitalize resort industry – new investment ▪ More attractions ▪ Better tourism marketing to NYC ▪ "Main Street America" ▪ Many small businesses with better salaries, diverse ▪ More educated workforce with work ethic ▪ Job opportunities in high tech, medical, etc. ▪ Pursue new tourism opportunities – e.g., conferences ▪ High-end assisted living for seniors ▪ Better schools & educational quality ▪ High-tech businesses
SUMMARY: VISION THEMES
<ul style="list-style-type: none"> ▪ Well-planned ▪ Revitalization ▪ More businesses and attractions ▪ Leadership ▪ Coordination ▪ Telecommunication services ▪ Diversity

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

Mountaintop Towns Meeting³

STRENGTHS	<ul style="list-style-type: none"> ▪ Natural resources (17 votes): hunting, fishing, hiking, scenic drives, four season, river frontage and boating ▪ Ski resort (11): for residents and tourists, retain and attract people, Mountaintop employment source, taxes ▪ Proximity to New York City and Albany (8): two hours from NYC – day travelers, second home ownership ▪ Cultural resources (4): Arts, music, museums, tourism, history, resident enjoyment, craft shop spin-offs, craft festival, quality of life ▪ Community involvement (4): Participation in activities, community reliance, volunteer fire department, security – quality of life, intermunicipal cooperation, community-based not-for-profit groups on Mountaintop ▪ School system (3): Good perception, advanced college credits, attract new residents – especially people with children, elementary and secondary ▪ Grant possibilities (3): NYC watershed, NYS parks ▪ Resorts & tourism infrastructure (2): employment base, tourism, summer
WEAKNESSES	<ul style="list-style-type: none"> ▪ Lack of regional master plan - need identity, vision (18 votes) ▪ Lack of aesthetic appeal (11) ▪ Lack of affordable housing (10) ▪ Property off tax roles – owned by non-profits (7) ▪ Distance to medical facilities – lack of medical services (5) ▪ Signage – identity of communities (2) ▪ Childcare – need for after school (2) ▪ Lack of business diversity (2) ▪ Lack of labor force (2)
OPPORTUNITIES	<ul style="list-style-type: none"> ▪ Changing perceptions of what there is to do here through marketing – opportunity to promote the area (10 votes) ▪ Reviving “sleeping assets” – e.g., old railroad bed is privately owned but could be recreational path to connect areas (9) ▪ Need to get DEP/DEC to allow more sewer hook-ups for small businesses (9) ▪ Creation of a multi-use path along existing road rights-of-way (highways/roads) (8) ▪ Telecommuting – if they can spend more time here, they will (need telecom infrastructure), professional services, cottage industry (6) ▪ Use of environment for recreation – access to state land (4)

³ Held at Hunter Elementary School, October 5, 2005. To save space, responses that received fewer than 2 votes are not shown.



2. Resource Assessment and Stakeholder Feedback

THREATS	<ul style="list-style-type: none"> ▪ New York City watershed regulations/ DEP (18) ▪ Lack of synergy (8) ▪ Outside not-for-profits (5) ▪ Competition for tourist dollars (2) ▪ Loss of recreational land / NYC (2)
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VISION ELEMENTS FOR MOUNTAINTOP TOWNS
<ul style="list-style-type: none"> ▪ Access to Mountaintop ▪ “The trains came back” ▪ 2,000 hotel rooms ▪ Year-round destination/year-round employment ▪ Same population with more second homeowners – extend their time here ▪ State/federal tax incentives to attract more small businesses ▪ Clean and healthy Main Street ▪ High school grads making a living here ▪ Emergency medical services/hospital ▪ Rebuilding community with infill, restaurants, retail – people spending money here ▪ Synergy between communities ▪ Community amenities – e.g. pool, park ▪ Improved public transportation - especially to shopping centers ▪ College satellite – CGCC – remote learning? ▪ Balance conservation & development ▪ Better synergy with DEP – access to city owned land ▪ Master plan for infrastructure in community ▪ Branding for marketing what’s here
SUMMARY: VISION THEMES
<ul style="list-style-type: none"> ▪ Year-round destination ▪ Small business ▪ Community amenities and services ▪ Balance ▪ Synergy

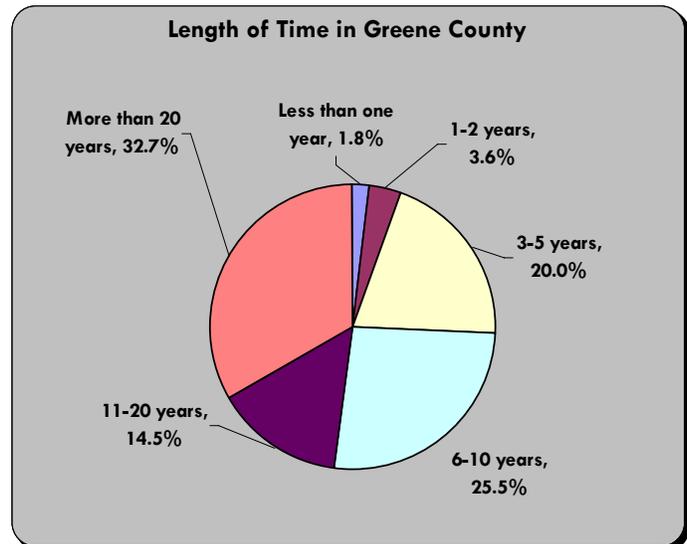


2. Resource Assessment and Stakeholder Feedback

Business Survey

To solicit input on the issues, needs and concerns of the local business community, a survey of Greene County businesses was conducted. As with the Consumer Preference Survey, the business survey was developed and made available for completion on the Internet via the GreeneBusiness Partnership website. The Greene County Chamber of Commerce helped to publicize the survey, informing the individual community chambers and posting a direct link to the survey on its website. Of the 55 businesses that completed the survey, 28 are located in the Historic River Towns, 18 in the Valley, and 8 on the Mountaintop.

- Asked how long their business has been operating in Greene County, fully one-third have been in the County for more than twenty years, 14.5% for 11-20 years and 20.0% for 6-10 years. As shown in the figure at right, few businesses that have been operating in Greene County for less than three years participated in the survey.



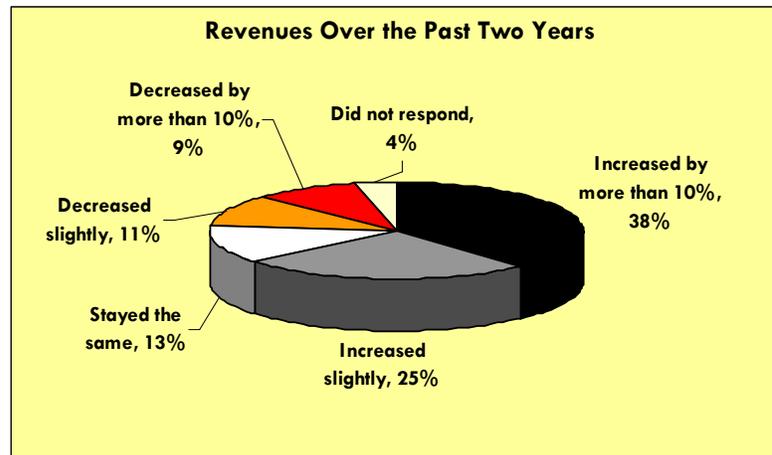
- Most of the survey participants are locally-based. The vast majority, 74.5%, described their business as a single facility or office based in Greene County; 14.5% have multiple locations in Greene County. Participants represent a range of industry sectors; however, because of the relatively small number of respondents, survey results are not necessarily representative of all businesses in Greene County.

Business Survey Respondents by Industry Classification	
	Percent
Professional, scientific, & technical services	16.4%
Retail trade	14.5%
Finance, insurance, or real estate	12.7%
Accommodation and food services	10.9%
Construction	10.9%
Arts, entertainment or recreation	10.9%
Manufacturing	3.6%
Agriculture, forestry, fishing, or hunting	1.8%
Wholesale trade	1.8%
Transportation and warehousing	1.8%
Other	12.7%

- Two out of three respondents employ fewer than five workers; only two surveys were received from businesses with 100 or more employees. This is consistent with the finding that Greene County has few large employers.

2. Resource Assessment and Stakeholder Feedback

- Sixty percent of the businesses indicated that their annual gross revenues are less than \$500,000, while 72.7% had gross revenues of \$1,000,000 or less. Nearly half of the respondents acknowledged that they typically experience a seasonal increase in revenues during certain times of the year, especially the summer months. Mountaintop businesses were more likely than businesses in the Historic River or Valley Towns to report a seasonal change in revenues.



- Nearly two-thirds of the businesses responding indicated that their overall revenues have increased over the past two years, while 20% said their revenues decreased.
- Asked why their business is located in Greene County, the majority of the responding businesses indicated it was close to their personal residence (52.7%), or the company started in Greene County (49.1%). Respondents also cited the quality of life (27.3%) and proximity to customers or clients (16.4%). (Percentages do not add up to 100% because respondents were able to select more than one answer.)



2. Resource Assessment and Stakeholder Feedback

- The quality of labor is a major concern of Greene County employers. Nearly half of the respondents said that they have problems recruiting new employees, while 18.2% have problems *retaining* workers. On a scale of 1 to 5, with 1 defined as “excellent” and 5 defined as “poor,” respondents gave labor availability an average rating of 4.06; work attitude was rated 4.00, while labor quality was rated 3.94. Labor productivity and costs are perceived as good to fair, with average scores of 3.79 and 3.65, respectively.

Employee Recruitment Problems

- “Educated managers. Motivated laborers.”
- “Finding sincere people who are reliable and loyal to the position [who are] eager to learn and stay with you while you re-train them...”
- “Hospitality sector jobs. Kitchen, dining, housekeeping, maintenance. None have experience and all need training.”
- “It seems the \$6-\$9 an hour workforce is slim. See help wanted signs along 9W.”
- “Skilled trades – available from outside of county.”
- “We are seasonal resort and our main problem is finding a workforce that is willing to do the jobs we offer...”
- “We do not require much more than drug free and high school or GED. Not much success. We interview ten to get four.”
- “Customer service reps for insurance agency.”
- “We have had the most difficulty finding office/customer service personnel. Basic soft skills are missing from our workforce...”

- The methods used most often by Greene County businesses to locate and recruit employees are word of mouth (72.7%) and referrals from other employees (54.5%), followed by classified advertising in the *Daily Mail* (29.1%) and the Internet (25.5%). The predominant use of informal methods may be due to the relatively small size of businesses in Greene County.

- The level of satisfaction with the *quality of life* in Greene County by local businesses is very strong. On a scale of 1 to 3, with 1 defined as “very satisfied,” 2 as “satisfied” and 3 as “not satisfied,” businesses gave quality of life an average rating of 1.75. *Recreational opportunities* averaged 1.96, while the *cost of living* rated 2.02. In contrast, businesses are far less satisfied with *retail/shopping facilities*, *health care services*, and *conference facilities*.

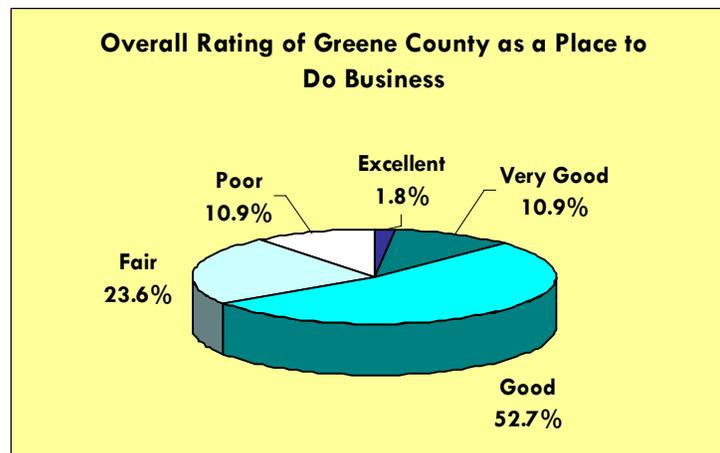
Level of Satisfaction with Characteristics of Greene County	
	Average Rating
Quality of life	1.75
Recreational opps	1.98
Cost of living	2.02
Housing affordability	2.18
Housing availability	2.25
Local gov't regs	2.30
Cultural amenities	2.31
Entrepreneurial climate	2.32
Cost of doing business	2.33
Quality of K-12 education	2.34
Financial incentives available	2.47
Conference facilities	2.60
Health care services	2.66
Retail/shopping facilities	2.75

Note: The lower the score, the higher the level of satisfaction



2. Resource Assessment and Stakeholder Feedback

- Asked about the importance of various factors for the location of their business, respondents identified the *availability of high-speed telecommunications services* (average rating of 1.49), the *availability of wireless services* (1.65), and *highway accessibility* (1.76) as most important, followed by the *availability of higher education* (2.00).
- The majority of survey respondents, 52.7%, rate Greene County as a “good” place to do business, while 23.6% describe the business climate as merely “fair.” From the perspective of local businesses, the County’s strengths include its location and proximity to other areas (e.g., Albany, New York City, Hudson River), New York State Thruway access, and the quality of life. Weaknesses are principally those related to the area’s sparse population and rural character: the lack of retail facilities, traffic, labor, infrastructure, services, and so on.



- Over the next 12-24 months, 40.0% of the businesses said they are considering hiring additional employees and 23.6% plan to renovate or expand their current facilities. Fifteen percent said that they are thinking about leaving Greene County due to high local and state taxes, the lack of business, and the shortage of skilled workers, among other reasons.

Greene County Comprehensive Economic Development Plan



2. Resource Assessment and Stakeholder Feedback

- More than 70% of the businesses responding to the survey said that workforce quality should be addressed as part of the plan. Other issues identified as key priorities included actively promoting Greene County for business attraction (67.3%), telecom infrastructure (65.5%), and revitalization of the County’s “Main Street” commercial areas (65.5%).

Issues to Be Addressed As Part of the Economic Development Plan				
	All Respondents	Historic river towns	Valley towns	Mountaintop towns
Workforce quality	70.9%	67.9%	77.8%	75.0%
Need to actively promote the County for business attraction	67.3%	60.7%	72.2%	87.5%
Revitalization of the County’s “Main Street” commercial centers	65.5%	67.9%	61.1%	75.0%
Telecom infrastructure	65.5%	64.3%	66.7%	75.0%
Workforce availability	58.2%	50.0%	72.2%	62.5%
Policies to balance economic development & environmental quality	56.4%	64.3%	61.1%	25.0%
Regulations and taxes impacting business	52.7%	46.4%	66.7%	50.0%
Improvement of K-12 education	45.5%	53.6%	33.3%	50.0%
Expanded access to public water and sewer	41.8%	35.7%	44.4%	62.5%
Need for better access to higher education in Greene County	34.5%	32.1%	38.9%	37.5%

2. Resource Assessment and Stakeholder Feedback

Feedback from Employers

Interviews were held with the representatives of approximately 20 major employers in Greene County in August 2005. The discussions addressed such topics as workforce issues, the local business environment, factors affecting the participants' business and/or industry over the next three to five years, and the effectiveness of existing business development and incentive programs. The input received from business leaders was very valuable and has been incorporated in many aspects of the economic development. Below is a brief summary of the interview findings.

- Concurring with the results of the business survey, the interviews revealed that major employers believe that the quality of labor in Greene County is limited. It takes:
 - 1 in 10 applications for a \$10 - \$15/hr. hourly job
 - 1 in 20 applications for a \$15 - \$20/hr. hourly job
 - 1 in 50 applications for a \$20+/hr. hourly job
- The screening criteria used by most employers in the hiring process include (1) education/experience, (2) work culture/ethic, and (3) passing a drug test.
- The local labor supply for jobs paying less than \$15 an hour is particularly limited. Commute issues often come into play, as qualified labor for these positions is available in the Capital Region, but applicants are not willing to commute to Greene County for jobs at this pay scale when there are plenty of similar jobs available locally.
- Employers report some issues with “no-shows” and the physical ability to work in warehouses.
- In general, companies locate in Greene County for several reasons:
 - The owner has a personal interest in the County - may be a former resident
 - It is a family business in transition: 2nd, 3rd, and even 4th generations
 - Greene County is a strategic location to serve New England, the Capital Region and the New York City area
 - The lower cost of labor and land
- Companies provide significant in-house training and very little utilization of Columbia-Greene Community College for technical training. They are not always aware of resources available for training through CGCC and the Workforce Investment Office.
- The local quality of life is limited for engineers, scientists and other professionals due to deficiencies in the quality and availability of housing, the lack of neighborhoods, the lack of major grocery chains, limited access to health care, and so on.



2. Resource Assessment and Stakeholder Feedback

- Outsiders – i.e., prospective companies visiting from other locations – perceive that work quality is reflected in how well residential properties are maintained. As a result, Greene County may be rejected as a potential business location based on the condition of property.
- A diversity of housing types is critical to attracting a more significant labor pool. There is a need for affordable housing, rental units, and family neighborhoods.
- Greene County has a lack of conference facilities and large hotels to support the business community as well as tourism.
- To address the limited local labor supply, ski facilities and some resorts utilize young internationals from South America, Australia and New Zealand with good results and low turnover.
- The competition for resorts is global; therefore, marketing and promotion is critical.
- Ski areas and other attractions are continuing to seek alternatives to extend the tourist season through other activities such as golf, paintball, mountain biking, arts & culture, spa experiences, special events, etc.
- Within the marketplace, the Catskill Mountains and individual communities (e.g., Hunter, Windham) have stronger name recognition than “Greene County.”
- Cooperative marketing is increasing.
- Greene County has had difficulty determining a market focus given the variety of activities (e.g., hiking, family fun, arts, antiques). There is no single draw outside winter season.
- There is a need for a critical mass of shops, cafes, and things for people to do, especially in the Mountaintop communities. Ellicottville, NY and Stowe, VT were cited as possible models for ski resort communities. They are very active communities, have a variety of lodging types and a mix of retail amenities and activities.
- The ski area clientele in Greene County is very upscale, with high expectations of facilities and service. The community itself is part of the experience.
- There is no hospitality program nearby to supply the industry; the nearest is in Delhi, in Delaware County.