

# Ulster Tomorrow



## TECHNICAL REPORT

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## **Ulster County Economic Development Vision Statement**

***Our economy will have a diverse base of successful locally and globally competitive businesses that provide meaningful and challenging jobs consistent with our culture, heritage, values, and a high quality of life. This will be achieved through a cooperative, system-wide effort to strengthen existing key businesses in the region, capitalize on our natural and physical strengths, and identify and cultivate new opportunities.***

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*The following people played a critical role and were instrumental in developing Ulster County's Strategic Economic Development Plan:*

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## Executive Summary

Ulster County has a rich history. From our agrarian beginnings, to the dawn of the industrial revolution, and then to our emergence as a regional economic powerhouse in Hudson Valley, Ulster County has been an integral part of the economy of upstate New York. During the 1990s, we experienced a dramatic change in our economic climate with the closure of a major industrial plant and the dislocation of hundreds—if not thousands—of businesses. This had a long-lasting, adverse impact on our workers and families. In the period since, we have struggled to revitalize our manufacturing base, maintain our legacy in production agriculture, and encourage a vibrant tourism-visitor industry without compromising our unique natural resource endowment.

This strategic planning effort, aptly named *Ulster Tomorrow*, is designed to help our County's delivery of economic development services. The plan will provide a sound basis for the implementation of economic development strategies, better coordinate the collective activities of the system, and provide focus to the strategic economic development efforts across our County. A culmination of efforts led to the decision to create a new strategic economic development vision, economic decision making framework, and strategic economic plan for Ulster County, all derived from collaborative public-private efforts. To meet this challenge, Ulster County Development Corporation (UCDC), Ulster County Industrial Development Agency (UCIDA), and the Ulster County Planning Department (UCPD) collaborated to establish a framework to:

- Advance new economic opportunities
- Improve living standards and quality of life
- Provide greater dignity and autonomy for workers
- Build stronger communities
- Widen citizen participation in public life

The purpose of this Plan is to provide you with:

1. An understanding of the factors and forces that shape our County's economy
2. Identification of key opportunities for economic development and growth
3. Ideas that will promote consensus on sustainable economic development initiatives
4. An "Inventory of Strategies" that when implemented will achieve the vision statement

This document contains four major sections:

- **Environmental Scan** – describes our County's economic performance based on research, interviews, surveys, and best practices
- **Public Engagement** – describes the processes used to engage the public in defining economic outcomes that would produce a vibrant Ulster County economy
- **Inventory of Strategies** – details a list of economic strategies derived from the public engagement process and environment scan
- **Appendices** – raw data and documentation supporting the core of this plan

## Report Summary

### Key Observations

Markets have become global and the pace of globalization is increasing. Economic development policy must consider national and global economic factors for many Ulster County key employers. Increasingly rapid advances in technology, product development, production, and distribution are both making our economy more productive, and changing the way goods and services are made and delivered to the marketplace. The population of Ulster County is aging faster than the state and national averages, as our population growth has slowed. It is unclear where we will find the number of new workers our businesses will need to keep pace with the global marketplace. The aging Baby-Boom population is expanding and is more demanding of a higher quality-of-life.

### Recent Trends Affecting Economic Development

Ulster County's relatively slow population growth rates and the loss of our younger population base raise some concerns about the depth of our future labor force. Roughly one-third of Ulster County's current population will reach retirement age within the next 20 years. Ulster County businesses need adequate numbers of skilled workers to succeed in the global marketplace or businesses will invest and grow elsewhere where needed labor force depth exists.

Increasingly longer commutes are becoming the norm. Nearly 1/3 of Ulster County work force now works outside of the County on a daily basis. Our proximity to New York City and high quality of life has made Ulster County attractive to "week extenders" who maintain contacts in NYC while working mostly in the County.

Lack of affordable housing discourages business expansion in Ulster County; it also discourages workers with the necessary skill sets for those businesses to support business expansion.

Therefore, it has been and continues to be difficult to support the growth of existing businesses, recruit new businesses, and obtain the required matching work forces.

Jobs will continue to be an important focus of this, or any, strategic economic development plan for Ulster County in the future. Ulster County's work force has an adequate number of workers for blue-collar jobs; however, lags other regions in occupations and jobs with skill sets that require 4-year and higher degrees. Personal income growth rate per person for Ulster County trailed the national average from 2001-2004. Average wages paid to workers declined relative to the national average between 1991 and 2005.

### Economic Development Best Practices

Economic development best practices include an integrated approach of offering financial incentives, emphasizing work force development, creating sustainable practices, promoting livable communities, using measurable outcomes, focusing locally, advancing cluster-based economic development concepts, and developing technology incubators.

### Economic Development Resources Inventory

An assessment of Ulster County's economic development resources was conducted through a survey of County business people. Respondents rated Ulster County's economy as being in a favorable condition in terms of its economic and community development resources. Ulster County was rated to have some significant economic development resource strengths—including a strong work ethic and a very "high quality of life"—which are growing increasingly important

in the competitive equation for successful economic development. Despite those important strengths, respondents noted several exceptions—including an almost unanimous view that affordable work force housing is a major obstacle to economic development in Ulster County.

### **Roles & Responsibilities for Economic Development**

Analysis for the strategic economic plan examined service providers that partly or wholly exist to foster economic development in Ulster County. Three common themes found among all service providers included: environmental focus; attracting businesses and developers through financial incentives; and orientation toward attracting and building high-tech, post-industrial, and knowledge-driven industries. Analysis revealed a complex structure with no recognizable standardized process, and clearly demonstrated the need for streamlined collaboration to increase predictability and ease of use.

### **Public Engagement Process**

Ulster County’s Collaborative Community Engagement (CCE) process utilized both data research and the collective minds of subject matter experts and decision-makers. Over 65 recruited individuals, representing a microcosm of Ulster County’s population, analyzed diverse data and created a prioritized list of outcomes required to build a vibrant economy for Ulster County. Appointed Task Force members transformed the outcomes into economic development strategies. The planning project’s Steering Committee refined these strategies and presented them in a public forum.

### **Inventory of Strategies**

An Inventory of Strategies is the genesis of the Ulster County’s strategic economic development plan. The inventory is a culminated effort of the CCE, Task Force, and Steering Committee.

<b>Engaged Leadership</b>	<b>Doing Business for Prosperity</b>	<b>Ingredients for Success</b>	<b>Targeting Key Sectors</b>
<b>Strategy 1:</b> Cultivate a Community of Leaders	<b>Strategy 4:</b> Target Assistance to Emerging Businesses	<b>Strategy 8:</b> Preserve and Enhance Quality of Life	<b>Strategy 12a:</b> Enhance the Travel and Tourist Industry
<b>Strategy 2:</b> Create a Culture of Change and Collaboration	<b>Strategy 5:</b> Redesign Services Network	<b>Strategy 9:</b> Recruit a Diverse Business Base	<b>Strategy 12b:</b> Strengthen & Maintain Economic Viability of Agriculture
<b>Strategy 3:</b> Develop Measured Accountability	<b>Strategy 6:</b> Streamline Local Permit & Review Process	<b>Strategy 10:</b> Retain and Expand Existing Businesses	<b>Strategy 12c:</b> Develop Strategic Advantage in “Green” and Renewable Technologies and Products
	<b>Strategy 7:</b> Develop Appropriate Infrastructure	<b>Strategy 11:</b> Create Labor Force Capability In Line With Business Needs	<b>Strategy 12d:</b> Nurture a Creative Economy

### **Next Steps**

Lead responsible agencies for the strategies have been identified. The Steering Committee will be expanded to accommodate these agencies and renamed the “*Ulster Tomorrow Consortium*.” The Consortium’s responsibilities include ensuring that the collaborative environment continues and implementation occurs. UCDC will act as lead agency and coordinator for work going forward. A portion of its website will include contact information for the Responsible Agencies. To stay abreast of the Plan’s progress, visit UCDC’s website at <http://www.ulsterny.com/>.

## ENVIRONMENTAL SCAN: ANALYSIS OF ECONOMIC PERFORMANCE

### **Key Points in This Section**

- This report builds on past efforts
- The ultimate goal was to increase the economic well-being of people in the region
- The “Circle of Prosperity” emphasizes the fact that economic development is a systemic effort
- A number of analyses were undertaken including: businesses and industries; population; workforce housing; workforce development; commuting patterns; education; employment; personal income and wages; technology; economic development best practices; and regional resources.

### Overview of Past Initiatives and Activities

Ulster County has been active in procuring data relevant to the region’s economic sustainability and its analysis. We chose the following selections to highlight many of the efforts that have been executed in Ulster County.

The Ulster County Development Corporation released a Strategic Plan for 2002/2003 that outlined the Corporation’s vision, mission, goals, initiatives, and indicators of success. It addressed the current economic and organizational status of Ulster County and the directions in which the County should concentrate its efforts and resources. Additionally, it discussed major players in the region and their roles as they pertained to the success of Ulster County.<sup>1</sup>

The Pathfinders, a Dallas-based firm, performed an assessment that studied work force supply as it pertained to site-selection. In completing their assessment, The Pathfinders looked at the following areas of interest: unemployment, underemployment, the amount it would take for a worker to leave their current job, as well as the amount it would take for individuals to come out of retirement. They also looked at the skill sets that were in demand and their matched with the work force. Their initial investigation found that the types of employers that were in the area or likely to come to the area required employees with higher level skill sets than those which the average unemployed worker possessed. They quantified the extent of underemployment as well as the costs and other factors associated with that hidden work force.<sup>2</sup>

The Special Commission on the Future of Ulster County was tasked with discovering the essentials for and impediments to business attraction and economic growth in Ulster County. The Commission held a public hearing to solicit perspectives from leaders of various sectors, among other directed efforts on October 5, 2004. A consensus was reached at the hearing directing efforts towards reinvigorating Ulster’s economy by whatever economically viable and sustainable means. The Commission recommended new partnerships be formed among leaders of the community, entrepreneurial development be fostered, technology and knowledge be enhanced, existing resources be maximized, and decisions on investment and promotion be guided. It also recommended that a County-wide Economic Development Strategic Plan be created to complement the existing County master planning effort.<sup>3</sup>

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<sup>1</sup> Slide presentation, *2002/2003 Strategic Plan*, Ulster County Development Corporation.

<sup>2</sup> The Pathfinders, (June 2003). *Ulster County, New York Area Work Force Report*. Dallas, TX.

<sup>3</sup> Special Commission on the Economic Future of Ulster County, *Findings and Recommendations*. November 29, 2004.

The Ulster County Housing Consortium researched issues associated with housing, including but not limited to, housing shortages and homelessness. They identified the major housing issue to be associated with cost. Their philosophy states, "...growth in our housing stock and achieving a healthy housing mix is best accomplished by creating an environment where developers, non-profit agencies, and government policy-makers collaborate to meet this growing need."<sup>4</sup>

Additional studies were completed by several consulting firms at the Hudson Valley area and the State of New York. Examples are the *Hudson Valley Area Labor Availability Report* by The Pathfinders, the *Executive Exit and Entrance Interviews* by Kate McEnroe Consulting, and the *Hudson Valley Region Economic Profile*, presented by Moran, Stahl & Boyer, LLC to the Hudson Valley Economic Development Corporation Board of Directors, June 14, 2005. The studies produced aggregate data that informed Ulster County of regional and statewide trends.

Three County agencies recognized the need for further work in economic development - the Ulster County Development Corporation (UCDC), the Ulster County Industrial Development Agency (UCIDA), and the Ulster County Planning Department (UCPD). The goal of UCDC is to enhance the public-private efforts to support business growth and community revitalization in Ulster County. The purpose of the UCIDA is to promote, encourage, attract and develop job and business opportunities and economically sound commerce and industry in cities, towns, and villages of Ulster County.<sup>5</sup> UCPD oversees the review of local site plans, special permits, variances, County comprehensive plans, and zoning amendments.<sup>6</sup> A culmination of the efforts mentioned above, and the efforts of these three agencies, led to the decision to create a new strategic economic development vision, economic decision making framework, and strategic economic plan for Ulster County, all derived from collaborative public-private efforts. To meet this challenge, UCDC, UCIDA, and UCPD collaborated to establish a framework to:

- Advance new economic opportunities
- Increase living standards and quality of life
- Create more individual choice and freedom
- Provide greater dignity and autonomy for workers
- Build stronger communities
- Widen citizen participation in public life

A Steering Committee was formed to oversee the strategic economic development planning. Its members are listed below:

The Honorable David Donaldson  
Dennis Doyle  
March Gallagher, Esq.  
Julie Krieger (Treasurer)  
Irene MacPherson  
Ronald Marquette (Vice Chair) ‡

The Honorable Glenn Noonan  
The Honorable Hector Rodriguez  
Robert Ryan, Jr. (Chair)  
Thomas Struzzieri  
Ward Todd (Secretary) †  
The Honorable John Valk

† President, Chamber of Commerce of Ulster County

‡ Board Member, Chamber of Commerce of Ulster County

<sup>4</sup> Ulster County Housing Consortium, 2005 Annual Report.

<sup>5</sup> Retrieved from <http://www.ulsterny.com/pdfs/IDAWhoWeAre3.pdf> on 3/2/07

<sup>6</sup> Retrieved from <http://www.co.ulster.ny.us/planning/about.shtml> on 3/2/07

## Why We Are Doing This

The term “economic development” is often misunderstood. From a regional perspective and elsewhere across the northeastern U.S., the term “economic development” has been used to characterize efforts to create new job opportunities and/or to increase the taxable grand list of individual communities. In communities, counties, and regions where economic development plans have been successful, the term “economic development” has a more encompassing meaning. To those regions/communities, the term is more than just creating businesses, jobs, housing, roads, and/or airports. They employ a broader definition that describes economic development as the process of **“building a community’s or region’s capacity for shared and sustainable improvements in the economic well-being of residents.”**<sup>7</sup> Under this definition, all of the above actions contribute to the accomplishment of positive economic development—including those that improve an area’s quality of life even if they are not based on an area’s export industries. This is where community and downtown development move into the economic development picture. Both are important contributors to economic development, even if they are businesses that primarily serve the local (e.g. Ulster County’s) population.

## The “Circle of Prosperity”: An Illustration of Why States/Regions Undertake Economic Development

This more encompassing definition highlights the fact that without a strong regional economy providing the necessary public resources, it is difficult for a state, County, or community to provide a strong social safety net, to protect the environment, and have high-quality public services. If the economy is not strong, it is nearly impossible to have services such as recreational amenities, sound roads, and good schools. All of those features are an integral part of what is commonly referred to as a “high quality of life” and evident in strong communities.

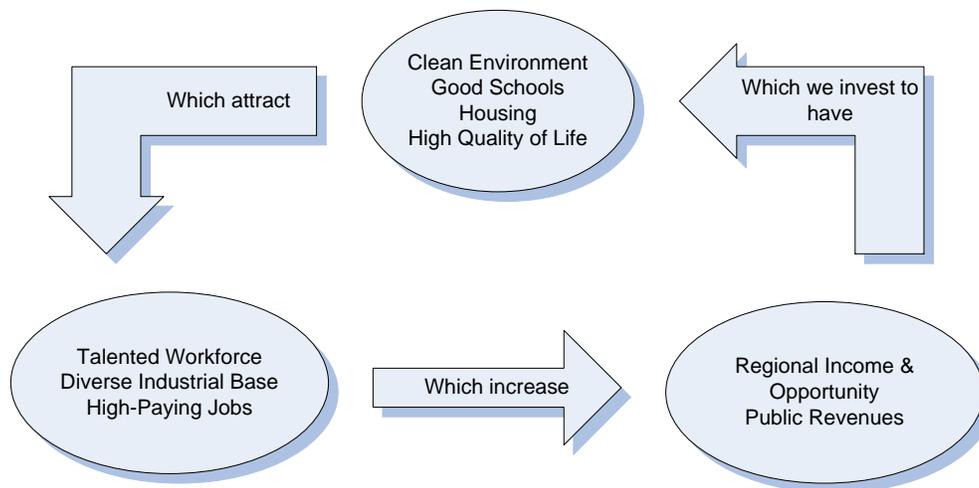
This “Circle of Prosperity” is portrayed in Figure 1. The concept of the “Circle of Prosperity” was first articulated in the state of Oregon Department of Economic Development back in the mid-1990s. The Department was at that time, and continues to be, an internationally recognized leader in developing and implementing leading-edge strategic economic development strategies and policy. This concept was later refined and expanded upon by the Vermont Business Roundtable in 1997 as part of a comprehensive review of that state’s economic development strategy as follows:

*“The ability to protect the environment, provide for the economically less fortunate, and provide opportunity for the current and future generations depends on the capacity of the state’s taxpayers to provide the public resources necessary to achieve those longstanding goals and collective desires. Without the tax- and revenue-generating business activities which produce adequate and improving wages for workers and competitive income for owners and risk-takers, our natural and cultural resources are at risk, and the social safety net cannot be maintained or improved.”*<sup>8</sup>

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<sup>7</sup> From Local Partnerships for Economic Development, Executive Office of Communities & Development, State of Massachusetts (1994).

<sup>8</sup> The Role of the Vermont Business Roundtable in the Evaluation, Coordination and Support of Economic Development Policy in Vermont, Report of the Economic Development Task Force, 1997. pp.1-2.



**Figure 1. Circle of Prosperity**

The “Circle of Prosperity” emphasizes the fact that economic development is a systemic effort, involving the collective and sometimes coordinated actions of many individuals, businesses, and stakeholders—sometimes in disciplines that do not directly tie to strategic economic development. While the concept of healthy economies producing needed resources for quality public services and the protection of the environment is hardly a new revelation, the process of harnessing and directing the collective efforts and resources of the multiple players in both traditional and non-traditional economic development roles toward a well-defined set of economic development goals is a much newer concept. **In fact over time, it has become increasingly apparent that this marshalling of the collective energies of a myriad of economic development services providers and strategic partners (in areas such as housing) toward a specific set of focused strategies is absolutely essential for a region’s or County’s long-term economic vitality and economic development success.**

This “Circle of Prosperity” implicitly assumes the presence of certain basic essentials in a regional or county economy to enable it to compete. These basic essentials include:

1. Basic essential life and professional skills **AND** a good work ethic within the work force,
2. A recognition that the work force is a regional asset—not a cost.

If the “Circle of Prosperity” is to reflect Ulster County, workers and businesses in the County have a shared responsibility to work cooperatively across all sectors and industries in the region. If they fail to do so, the region will be known to have a negative worker-business relationship to the detriment of the self-reinforcing nature of the “Circle.”

Obtaining agreement on what is to be done is a crucial first step in this strategic economic development process. Building consensus among Ulster County’s leaders, stakeholders, and County residents of what constitutes good economic development is an important starting point.

## Cluster and Target Industry Analysis

The objectives of the Ulster County economic assessment are four fold:

1. To increase the understanding of the Ulster County and regional economy,
2. To identify and understand the sources and factors underlying the economic performance of Ulster County and the region,
3. To highlight trends that will affect economic development in Ulster County over the next 5 to 10 years, and

4. To identify where to focus strategic economic development and efforts that build competitive advantage over the next 5 to 10 years and maximize the potential for renewed economic success in Ulster County.

This effort is intended to assist the many individuals, businesses, and groups who have dedicated their efforts and energy to Ulster County's development. It allows them to focus their collective energy on strategies and actions, which offer the best opportunities for improving the ability of the region to succeed economically in the future. This discussion of the economic development context for Ulster County is the first step in the strategy development process and pertains directly to objectives #1 and #2 above. These objectives provide facts and analysis that assist the Steering Committee, Collaborative Community Engagement (CCE)<sup>9</sup> participants, and other stakeholders to develop a common understanding of the data related to Ulster County's economic development climate and its long-term economic development challenges.

### Identifying and Understanding Ulster County's Needs to Achieve Economic Success

In order to achieve economic success, Ulster County must take the following steps:

- **Promote understanding at the regional and local level as to why the economy performs as it does**
  - Identify the major sources of jobs in the region and examine how they have performed and changed over time
  - Identify and quantify changes in Ulster County's economic and demographic base over time
- **Gain insight into what will eventually lead to appropriate strategies and assign appropriate priorities that could be or will be developed in the planning process**
  - Identify and categorize key industries (including leading, lagging, and emerging sectors) and examine their performance relative to the state and national economy
  - Identify significant employers in existing groups of important key industries in the region, and identify the attributes of successful industries and emerging industries in the region for further analysis
  - Identify the needs of leading and emerging industries in the region that offer the best chance for long-term economic prosperity in Ulster County
- **Develop specific strategies to support the competitive needs of key industries in the region (completed later in the process)**
  - Prioritize these strategies into a manageable group of specific actions for implementation

Laying the groundwork for economic development analysis, one must first understand the following, subsequently described in detail:

- Review of macro trends affecting today's economic development climate
- Economic development context: Recent trends in population growth, commuter patterns, housing growth, and educational attainment
- Recent trends in employment and unemployment
- Identifying and understanding Ulster County's key industries

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<sup>9</sup> "Collaborative Community Engagement" replaces the previous event title, "Collaborative Jury Process." The name was changed to avoid any confusion with and/or unintentional infringement upon the term "Citizens' Jury."

## Review of Macro Trends Affecting Today's Economic Development Climate

Today, there are several forces, largely external, at work on the regional economy that are likely to have a significant effect over the next 5 to 10 years. Such large and external forces are generally not within the sphere of influence of Ulster County and its economic development service providers because they are national or even global in scope. The following section discusses these key “extra-regional” trends that are likely to impact the economic development climate in the Ulster County and greater Hudson Valley Region during the time horizon of this updated strategic economic development plan.

### **Macro Trend #1: *Markets have become global and the pace of globalization is increasing.***

**Observation:** The world has and continues to become more integrated economically and Ulster County and the entire Hudson Valley Region have become less and less isolated (protected) from global economic events.<sup>10</sup>

**Implication:** Economic development policy must consider national and global economic factors for many Ulster County and region key employers. Economic development strategy and policy cannot be made in a vacuum or in isolation of these still-unfolding external developments.

### **Macro Trend #2: *Technological innovation continues to advance rapidly.***

**Observation:** Increasingly rapid advances in technology, product development, production, and distribution are both making our economy more productive, and changing the way goods and services are made and delivered to the marketplace. This technological advance has allowed the work force (labor) and investment dollars (capital) to make “more with less.”

**Implication:** Encouraging continued growth in productivity (including new investment and a focus on work force preparedness) is one of the keys to Ulster County's ability to compete.

### **Macro Trend #3: *The “New Economy” has fundamentally altered the competitive landscape.***

**Observation:** Despite the downturn in information technology during the early years of the 21<sup>st</sup> century, the widespread adoption of information technology (e.g. the Internet, sophisticated telecommunications,<sup>11</sup> the widespread use of personal computers and other electronic devices for communications, and information-knowledge sharing, etc.) means “new economy” competition is here to stay.

**Implication:** The “new economy” has changed the way companies and entrepreneurs compete, and this competitive formula keeps evolving. It has simultaneously opened Ulster County to new opportunities that are global in scope and exposed the County region to new globally-based risks. Ulster County (and the Hudson Valley region) needs a nimble and flexible economic development policy and toolbox so that it can assist existing County employers and potential new businesses with the application of knowledge and technology to the production process and distribution chain—in a way that is better than all of the peers and competitors of Ulster County.

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<sup>10</sup> This trend is bolstered by the fact that the entire continent of Europe moved to a single currency within the last 5 years.

<sup>11</sup> Which has diminished the importance of geographic proximity to markets.

**Macro Trend #4: *The population of Ulster County is aging faster than the state and national averages, as our population growth has slowed.***

**Observation:** The average age of Ulster County’s population in 2000 was higher than the average for both the State and nation as a whole. Additionally, since 1980, Ulster County aged at a faster rate than the state and nation (see Table 1).

	Ulster County	New York	United States
1980	32	32	30
2000	38	36	35
Change (1980-2000)	6	4	5

Source: U.S. Census Bureau

**Table 1. Estimated median age of the population (in years)**

**Implication:** Roughly 3 of every 10 people (30.7%) in Ulster County will reach the age of 65 years within the next 20 years, the traditional age of retirement. With such a significant portion of our population potentially retiring by 2026, it is unclear where we will find the number of new workers our businesses will need to keep pace with the global marketplace.

**Macro Trends #5: *The aging Baby-Boom population is expanding and more demanding of a higher quality-of-life.***

**Observation:** As the baby-boom population ages, more and more people will enter their peak earning years (before they eventually begin to retire). These same aging “Baby-Boomers” are mobile and demand more and better leisure time activities, facilities, and safe communities that contribute to a high quality-of-life.

**Implication:** High quality-of-life is increasingly becoming the key to work force attraction and retention issue in strategic economic development.

### Unique County Factors

Along with the macro factors that influence Ulster County’s economy as discussed above, there are several factors that also appear to influence how the regional economy fares. These factors can be viewed as individually unique characteristics that can either be targeted as economic development assets for the region that can be used to enhance positive change or as issues that have the potential for continued impairment and need to be addressed.

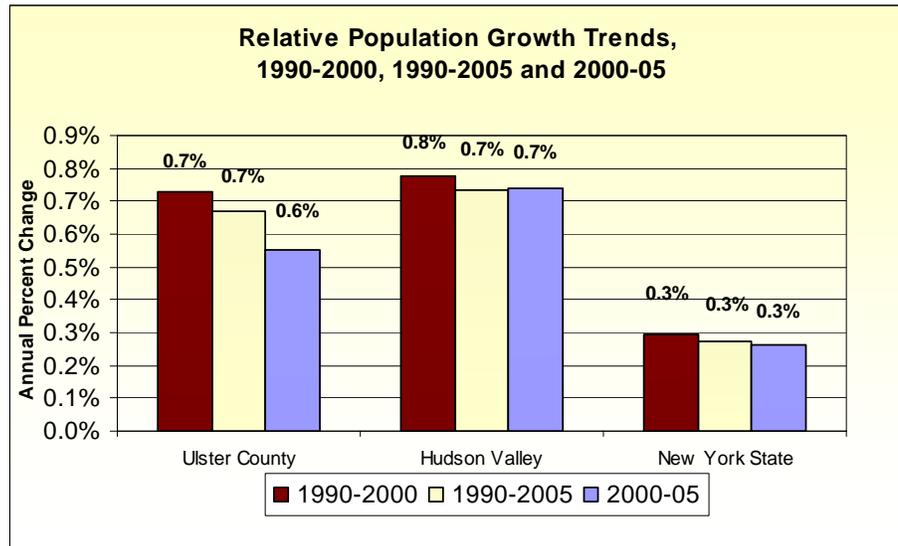
1. The strong “influence” of the New York metropolitan area which offers unique opportunities for tourism and visitor activity, cultural and destination retail, and economic development for high value added activities (both service and production) where proximity to final customers does not require companies to be located in that metro region.
2. The region has significant “facilities assets” that are available for development (some with and some without the need for significant renovations). These could be utilized without adversely affecting Ulster County’s open land assets.
3. As a region that is still undergoing some economic change following adjustments by major employers (including the reduction and re-establishment—albeit in a neighboring county—of IBM as one of Ulster County’s largest employers).
4. The region has also experienced an increasing number of in-migrants who work outside of Ulster County due to housing market developments in the greater Hudson Valley region. Economic development policies could be explored to take advantage of these

new in-migrants that may represent an opportunity to cultivate quality jobs for those new residents which could also encourage a new level of entrepreneurship in the region.

**Economic Development Context: Recent Trends in Population Growth, Commuter Patterns, Housing Growth, and Educational Attainment**

**Recent Trends in Population Growth**

Between 1990 and 2005, Ulster County’s population grew at the rate of 0.7% per year. This corresponded to a total 15 year increase of 10.5% or 17,839 total residents. Our County’s rate of population growth was slightly below the 0.8% annual average rate of population growth experienced in the Hudson Valley Region<sup>12</sup> as a whole. Our



County’s average annual population growth rate over the period was 0.4 percentage points greater than the upstate New York average (defined as New York State less the New York City metro area throughout this section<sup>13</sup>). **Between the 1990 and 2000 Censuses, Ulster County experienced a slightly higher rate of population growth versus the full 1990-2005 time period.**

Ulster County is part of the entire Hudson Valley region. Overall, Hudson Valley has experienced a slightly higher population growth rate than Ulster County. The Hudson Valley region also experienced the same temporal pattern to population growth as our County and the upstate New York average. The Hudson Valley region also, like Ulster County, experienced significantly stronger rates of population growth versus the upstate New York average.

During 2000-2005, Ulster County’s population growth rate slowed slightly, to just 0.6% per year, corresponding to a total population growth of just 4,944 residents over the 5-year period (or a total of just 2.8%). This 0.6% per annum rate of population growth follows an already restrained population growth rate trend for Ulster County, the region, and upstate New York during the 1990s. Although there is variability in the growth rates of the population, the magnitude of this variability is minimal, because the overall change in population has been very small.

<sup>12</sup> The Hudson Valley region is defined as the Hudson Valley Labor Market Area, and includes the counties of Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster and Westchester.

<sup>13</sup> The New York City area is defined as Bronx, Kings, New York, Queens and Richmond counties. All tables, charts and graphs referring to New York State in this study use data with the New York Metro area removed. In many cases this area is referred to as non-NY Metro New York.

Examining the comparative population structure and growth trends by age category shows that Ulster County’s population, like the population for the Hudson Valley Region and upstate New York, experienced the largest rate of population growth in the 45 - 64 age category. Our County, again like the population for the Hudson Valley Region and upstate New York, lost population in both the 15 - 24 and 25 - 34 age categories. The combined 7,030 loss in total persons aged 15 - 34 years corresponded to a (-13.6%) decline, slightly more than the (-13.1%) decline for the Hudson Valley Region overall, and 2.8 percentage points less than the (-16.4%) decline in those two age categories for the upstate New York average overall.

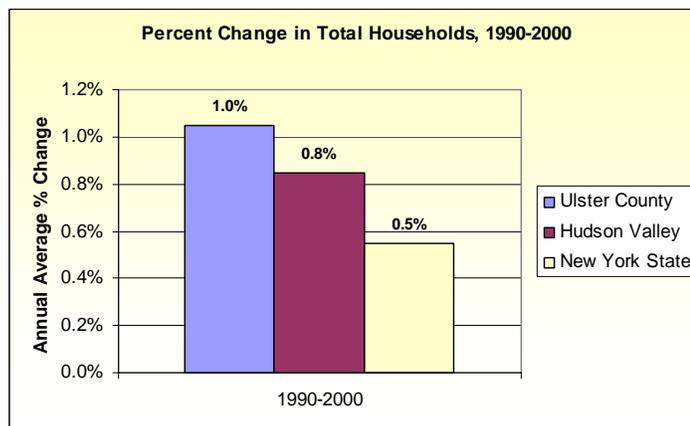
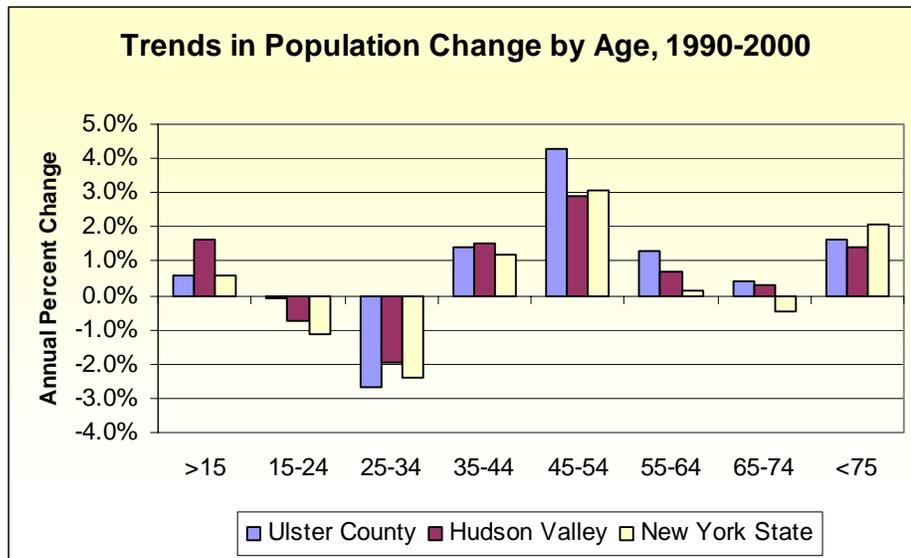
**Implications for Economic Development**

Ulster County’s relatively slow population growth rates and the loss of our younger population base raise some concerns about the depth of our future labor force. Roughly one-third of Ulster County’s current population will reach retirement

age (65 or 67 years) within the next 20 years, and will likely exit the labor force (e.g. potentially leave Ulster County altogether). At this point, the region’s trends are not alarming in comparison to the Hudson Valley regional or upstate New York averages. However, the age profile of Ulster County’s population growth cannot in any way be viewed as a positive development from an economic development perspective. Further investigation is needed to determine the factors underpinning this trend (e.g. lack of economic opportunity, problems with affordability in our County). **Ulster County’s businesses need adequate numbers of skilled workers to succeed in the global marketplace or businesses will invest and grow elsewhere where needed labor force depth exists.**

**Work Force Housing Affordability**

Closely related to the growth in population is the growth in the number of households. Looking at the change in the number of households during 1990-2000, Ulster County experienced the largest percentage increase in the number of households among all three geographic areas at 1.0% per year, or a total increase of 11.0% over the 10-year period. Hudson Valley



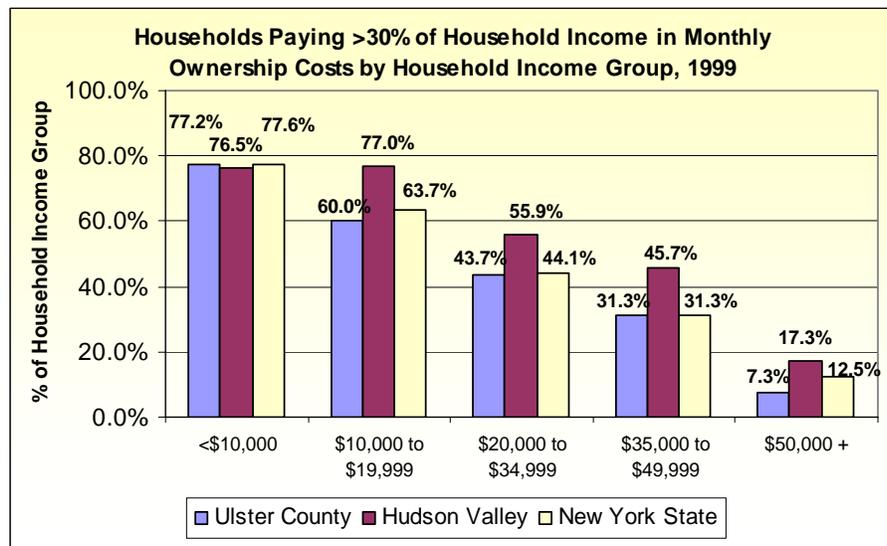
experienced the second largest increase in the number of households at 0.8% per year or a total increase of 8.8% in 1990-2000. Upstate New York experienced the smallest increase in number of households at 0.5% increase per year or a total increase of 5.6% in 1990-2000. The data show that the number of households has been growing at a slightly higher pace than population, indicating that the size of households is getting smaller. The population is growing older, and household size is declining as children move out of their parents' homes and into homes of their own.

**The aging population, declining household size, and evidence that an increasing number of households have been moving into Ulster County from higher price housing markets, are putting increased pressure on our housing stock.** This is important to the economic development future of our County, because affordable work force housing is becoming an increasingly important part of the economic development climate. Detailed data and trends in this regard were published in June 2005 in a comprehensive housing strategies study, which was spearheaded by The Ulster County Housing Consortium<sup>14</sup>. The UCDC, UCPD, and the Rural Ulster Preservation Company (RUPCO) were principal participants in that study.

The June 2005 study found that the housing affordability stress burden was high and increasing across Ulster County, especially between 1998 and 2004. Although the housing market appears to have slowed in recent months, prices remain high and affordability has not improved.

Housing prices have not yet actually declined significantly in our County (at least not as of this writing), only the rate of increase in housing price has moderated. The following charts show Ulster County data from the 1990 and 2000 Censuses with the peer geographies used in this background analysis. They show that housing affordability in the region during the 1990s deteriorated in Ulster County relative to the Hudson Valley Region for both owners and renters—using the

Department of Housing and Urban Development's 30% of household income threshold for housing costs stress. The data show that in all five household income categories, Ulster County households experienced less financial stress burden relative to upstate New York. The Hudson Valley as a whole, in contrast, had higher levels of housing cost stress burden in each household

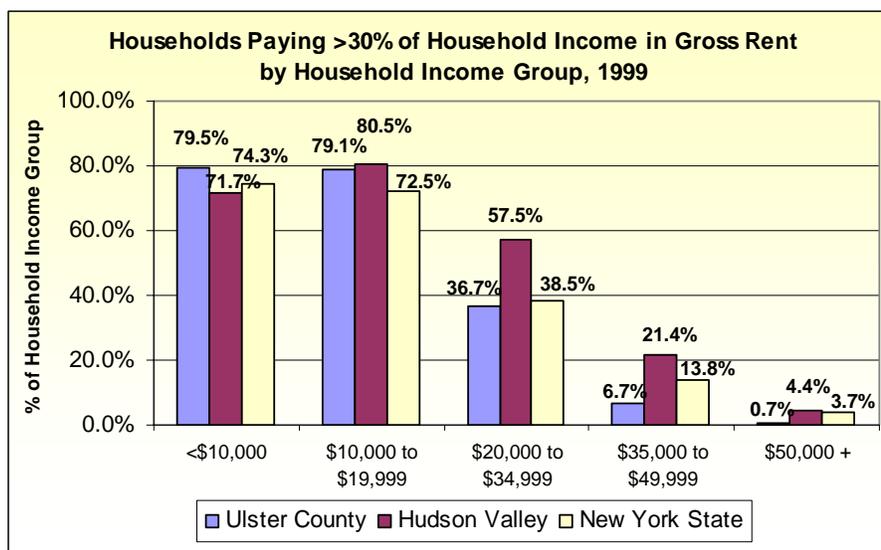


income category with the exception of household income category of less than \$10,000. Upstate New York, as a whole, appears to have more of an affordability problem than our County, due to the generally lower household income.

<sup>14</sup> Priority Strategies to Support Housing Development in Ulster County, Ulster County Housing Consortium, June 20, 2005.

The data also indicates that regardless of geographic area, the highest number of those considered financially stress burdened by owner housing costs is in the lower income categories. In Ulster County, 77.2% of homeowners whose household income was below \$10,000 in 1999, and 60% of households earning between \$10,000 and \$19,999, spent more than the 30% threshold on housing. This represents a significant housing affordability problem in Ulster County.

The housing affordability patterns that exist for owners persist in the rental market. Ulster County has the lowest number of households under stress (cost burdened), and the Hudson Valley as a whole has the highest number of households with stress in every income category accept those earning below \$10,000. Ulster County has the highest number of households spending more than 30% of their income on housing, or 79.5%. The affordability issue persists on the renter side of the housing market. In the case of households earning less than



\$10,000 the problem is slightly bigger for renters than for owners. For renter households earning between \$10,000 and \$19,999, the affordability issue is considerably more severe than their home owning counterparts, with 19.1% more renters experiencing financial stress burden. Affordability conditions were noticeably better for renters with household incomes of \$35,000 and above when compared to owners. There were 25% fewer stressed burdened renters with household incomes between \$35,000 and \$49,999 in Ulster County compared to owners in 1999. For renters with household income in excess of \$50,000 in 1999, there was a total of 6.5 % fewer cost stressed-burdened households.

This declining housing affordability trend is similar for upstate New York and the Hudson Valley Region. The lower level of housing stress-cost burden for renters in the upper categories is typical for most housing markets. This is because there are few renters in the upper household income categories who are not renters by choice. At some point, high rents will induce renter households to buy—thus begin paying a mortgage instead of rent. Landlords for this household income category can only charge rents up to a certain point before renters understand they would be better off buying—and often act accordingly.

**Implications for Economic Development**

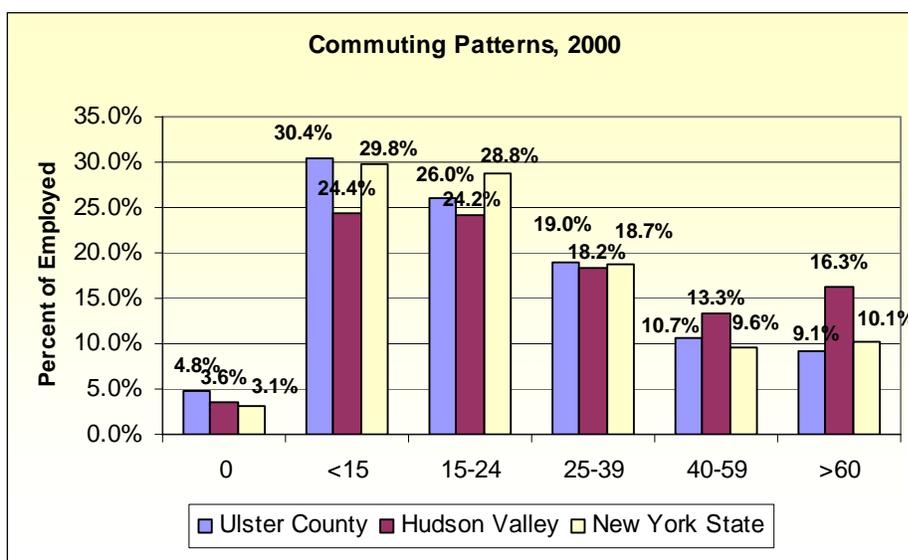
In a time when quality of life is an increasingly important part of attracting and retaining a quality work force, recent trends in housing costs and affordability is increasingly an economic development issue. This is particularly true for the younger end of the age spectrum—those young working families that comprise the next generation of Ulster County’s leaders and workers.

**Lack of affordable housing is a negatively compounded barrier for economic development.**

It discourages businesses from expanding and locating in our County, while at the same time it discourages workers with the necessary skill sets for those businesses from moving into our County. Therefore, it has been and continues to be difficult to support the growth of existing businesses, recruit new businesses, and obtain the required matching work forces. Strategic partnerships are needed to address our work force housing issues. The Ulster County Housing Consortium is a crucial regional organization that is working to help assure a brighter economic future for Ulster County.

**Commuting Patterns**

The following chart shows the commuting patterns of the population in all three peer regions as reported in the 2000 Census. The largest portion of workers traveling from their home to their place of work has a commute of less than 15 minutes in all three geographic group areas. Ulster County has the highest percentage of commuters (at 30.4% of the total) relative to both the region (24.4%) and upstate New York (29.8%) that were within 15 minutes of work in 2000. In the next category, those with between 15-24 minute commutes, Ulster County again had a higher percentage of workers traveling that amount of time from home to work (26.0%), versus the peer regions of Hudson Valley (at 24.2% of the total), and upstate New York (at 28.8% of the total). Over half of Ulster County’s commuters travel no more than 24 minutes to work and 75% travel less than 40 minutes to work. Our proximity to New York City and high quality of life has made our County attractive to “week extenders” who maintain contacts in NYC while working mostly in Ulster County.



What looked only 5 years ago to be a situation where most commuters stayed within Ulster County or within the Hudson Valley to work, may no longer be true. **Increasingly longer commutes are becoming the norm. Nearly 1/3 of Ulster County’s work force now works outside of the County on a daily basis.** This

reflects the tendency of many residents, especially along Interstate 87 and in the southern parts of the County, to commute to job centers toward or even into the New York City metropolitan area.

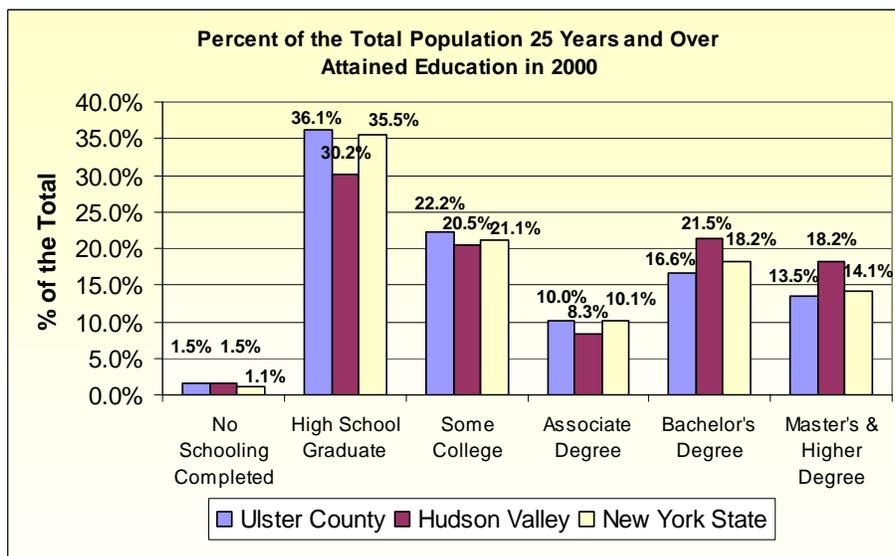
**Implications for Economic Development**

If the anecdotal evidence rings true, there may be an opportunity to “capture” some of the talented work force that potentially commutes to other job centers outside our County. Utilizing the natural inclination of workers to live nearer to their jobs (especially in today’s high and volatile energy price market), Ulster County could access a greater share of its resident labor

force if it can implement strategies that result in the creation of the type of high quality jobs needed to keep those workers closer to home. This is one potential way to address the upcoming labor force demographics tied to the current slow population growth and aging population trend evident in Ulster County and greater Hudson Valley Region.

### Data on Educational Attainment

One important measure of the depth and talent of Ulster County’s labor force is the comparative level of educational attainment by residents over the age of 25 years. The level of educational attainment aged 25 years and over in the three peer comparative areas is displayed in the following chart. In 2000, Ulster County had the highest percentage among the three peer regions of



population aged 25 and up with a high school diploma (at 36.1%). For the Hudson Valley Region (30.2% of the total) and upstate New York (35.5% of the total), these percentages were slightly to significantly lower in 2000. Ulster County also had the highest percentage of its population over 25 years with “some college” or with an associate’s degree. **The County loses its relative advantage when compared to the Hudson Valley Region and upstate New York averages in the percentage of its population over 25 years of age with either a bachelor’s degree or a graduate degree.**

### Implications for Economic Development

Ulster County’s work force appears to be well-positioned to provide workers for many blue-collar professions, but lags somewhat behind its peer regions in occupations and jobs with skill sets that require 4-year and higher degrees. This represents a potential vulnerability for our County’s economic future, since many of the emerging and growing professions today require more than just an associate’s degree. This may be an area ripe for action by Ulster County stakeholders involved in work force preparedness. **These stakeholders could help ensure our work force is equipped with the right skill sets to meet the needs of growing businesses and needed occupations in the global economy of the future.**

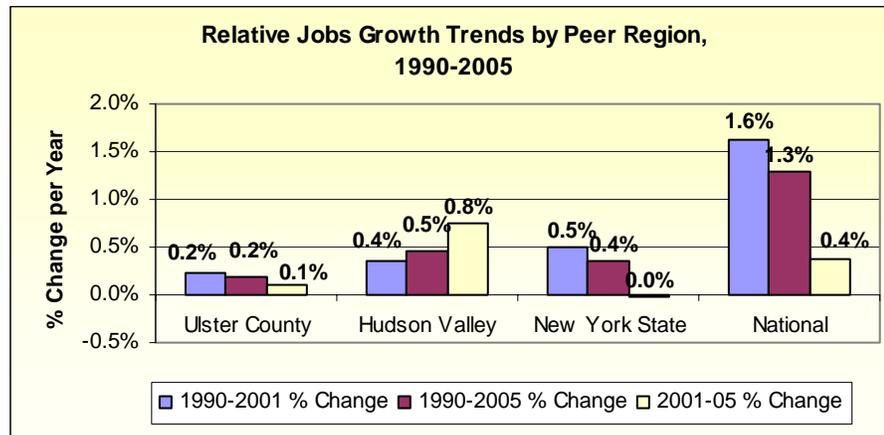
### Recent Trends in Employment and Unemployment

The next section of this background analysis includes an assessment of recent trends in job growth and other benchmarks. It also includes an assessment of the structure of Ulster County’s job base and how it has evolved over the entire 1991-2001 business cycle and the current business cycle to date.

### Job Growth Trends

Ulster County employment grew more slowly in comparison to the Hudson Valley Region and upstate New York averages in 1990-2001, as well as in 1990-2005. During the 1990’s and 2001, Ulster County experienced a gain of 1,481 jobs corresponding to a total of 2.5% growth or 0.2% increase per year. More recently, employment growth has slowed slightly. During 2001-2005, our County experienced an increase of only 239 jobs, or a rate of only 0.1% increase per year. For the most part, this is likely attributable to the national economic recession, which turned around in late-2002 or early 2003. The Hudson Valley Region and upstate New York have experienced twice our County’s growth per year during both periods. The Hudson Valley

Region, as a whole, experienced a gain of 32,674 jobs over the period (corresponding to a +0.4% rate of increase per year), and upstate New York, likewise, showed a gain of 259,923 jobs (corresponding to a 0.5% rate of increase per year) between 1990 and 2001 (or over the last complete business cycle).



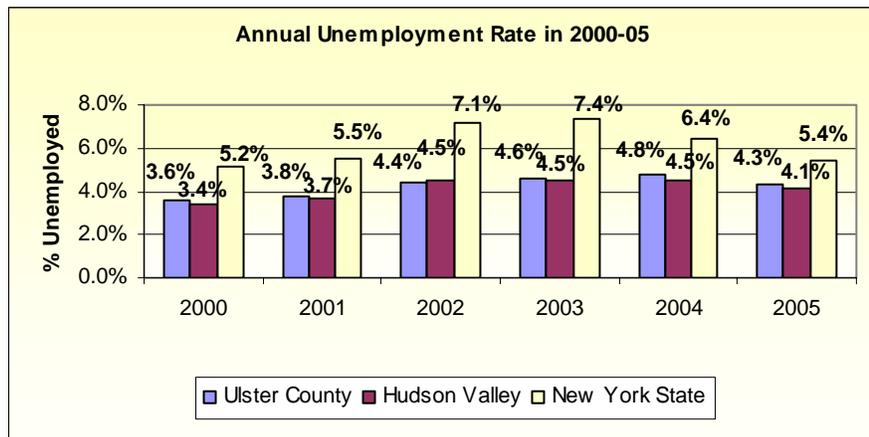
1990 and 2001 (or over the last complete business cycle).

During the most recent time frame where annual employment data is available (or for the 2001-2005 period), the data show that the Hudson Valley Region has experienced much stronger annual rates of employment growth per year than either Ulster County or upstate New York. In fact, the rate of job increase in the Hudson Valley Region is roughly 8 times Ulster County’s rate and even higher versus the upstate New York rate, where jobs have actually been lost (likely ties to the struggle of financial services and the aftermath of the September 11, 2001 terrorist attacks). Despite the varying job change rates between the peer regions in this assessment, it should be noted that each New York peer region is sub-average versus the national average over the period. This is not surprising because the population has also grown at a very slow rate. However, the slow growth in population does not appear to be the only factor at work.

**Ulster County’s population grew at 4 times its employment between 2001 and 2005.** At the same time, the Hudson Valley Region’s jobs grew at nearly the same rate as its population. A potential reason for this disparity is that a significant portion of the population that resides in Ulster County now travels outside of the County for work—a development that may in fact have occurred over the period since the 2000 Census. This is further supported by the fact that Ulster County’s unemployment rate (which counts employed and unemployed people by place of residence, versus jobs at businesses in the above data and discussion), has not departed from the trend that the Hudson Valley Region has experienced. As indicated in the above discussion, slightly more than 19.0% of Ulster County commuters travel more than 39 minutes to work. Although this is not a large portion of Ulster County’s work force, it is likely that this trend has intensified due to changing housing market-affordability conditions since the 2000 Census.

Ulster County and the Hudson Valley Region were not immune to the 2001 recession, but they have also shared in the recovery as evidenced by the decline in the unemployment rate since

2004. The Hudson Valley Region appears economically healthier than the rest of upstate New York as evidenced by the unemployment rate. The gap between the Hudson Valley Region's and upstate New York's unemployment rate has been about two percentage points for most of the previous five years and has only started



to close in the past year. The main reason for this is the economic decline that large portions of upstate New York have been experiencing for over a decade. The Hudson Valley Region not only benefits from its proximity to New York City, but also likely from the Tech Valley Initiative that stretches all the way into the Capital District of New York.

**Comparative Analysis of Job Structure**

Table 2 outlines employment change by industry sector in Ulster County, the Hudson Valley Region, and the upstate New York averages. The largest employment sector for the past 15 years in Ulster County has been the retail sector, followed by health care and social assistance, and accommodation and food service sectors. The manufacturing sector was one of the largest non-farm private industries in the beginning of the 1990's, but has since lost in job-share prominence as the service sector has grown.

**One of the more significant reasons for the employment change is that the national economy as a whole has become more service-oriented.** A popular explanation for this observed phenomenon is that manufacturing jobs have moved out of the country (e.g. were potentially out-sourced) where wages are lower. While that likely represents a part of the story, it should be noted that manufacturing jobs have also been lost to other states where the wages and taxes are lower than New York's.

<b>1990-2001</b>	<b>Ulster County</b>	<b>Hudson Valley</b>	<b>New York State</b>
Construction	-0.4%	0.6%	0.2%
Manufacturing	-1.1%	-3.2%	-3.0%
Retail Trade	1.1%	0.3%	0.0%
Finance & Insurance	-3.8%	-1.4%	-0.5%
Admin. & Waste Serv.	3.6%	1.6%	3.2%
Health Care & Social Asst.	2.9%	2.1%	2.3%
Accommodation & Food Serv.	1.0%	0.1%	0.8%
Other Serv.	2.0%	1.4%	1.6%
<b>1990-2005</b>	<b>Ulster County</b>	<b>Hudson Valley</b>	<b>New York State</b>
Construction	0.6%	1.5%	0.2%
Manufacturing	-3.1%	-2.7%	-3.2%
Retail Trade	0.8%	0.4%	0.0%
Finance & Insurance	-2.3%	-0.6%	-0.1%
Admin. & Waste Serv.	4.1%	1.9%	2.5%
Health Care & Social Asst.	2.2%	2.0%	2.1%
Accommodation & Food Serv.	1.1%	0.7%	0.8%
Other Serv.	2.4%	1.3%	1.2%
<b>2001-05</b>	<b>Ulster County</b>	<b>Hudson Valley</b>	<b>New York State</b>
Construction	3.4%	4.0%	0.1%
Manufacturing	-8.2%	-1.3%	-3.9%
Retail Trade	-0.1%	0.6%	0.0%
Finance & Insurance	1.9%	1.7%	0.8%
Admin. & Waste Serv.	5.4%	2.8%	0.3%
Health Care & Social Asst.	0.4%	1.5%	1.5%
Accommodation & Food Serv.	1.2%	2.4%	0.6%
Other Serv.	3.6%	1.2%	0.2%

Basic Data Source: Bureau of Labor and Statistics

**Table 2. Annual average percentage change in jobs by industry, 1990-2005**

Wage gradients are not the only culprits of decline in manufacturing in Ulster County, region, state, and country. A major factor has been significant—even stellar—gains in productivity. It may be at this point in the “New Economy” that measuring health of a goods-producing industry may no longer be grounded in just job trends. However, many goods-producing companies are healthy today, still making them an important economic development metric against which services providers and governments can be measured. Job trends will continue to be an important focus of this, or any, strategic economic development plan for Ulster County in the future, even if the interpretation of job trends needs to occasionally be modified in goods-producing sectors for increasing productivity. Goods-producing sectors will therefore continue to be an important part of this strategic plan, even though they may have reduced employment over time.

Table 3 shows the change in the composition of the private non-farm employment in the selected geographic areas. During the 1990s, the industry whose share of employment grew the fastest included retail trade, health care and social assistance, and accommodation and food services, which combined, composed between 20% and 30% of each area’s total employment. Retail trade employment has grown by 1.2% in the last 15 years in Ulster County. It has slowed in the

last 4 years to the point of slight decline, after growing by 1.4% in the last full business cycle. This has not been the case in the Hudson Valley Region and upstate New York, where retail trade employment has declined slightly over the past 15 years. The increase in retail trade employment may be a sign of increased tourism in Ulster County as employment has increased in the accommodation and food service sector as well. Health care and social assistance employment has been the strongest growing sector in Ulster County, the Hudson Valley Region, and upstate New York averages at roughly 3% per year. This trend appears to be driven by and is a logical outcome associated with the aging of the population as whole (mentioned above).

The data show that manufacturing industry employment has declined as productivity has increased and out-sourcing has had some impacts. The 15-year annual decline of 4.6% in share has been more pronounced than the Hudson Valley Region (which also experienced a decline and then re-emergence at the East Fishkill IBM facility) as a whole but not nearly at the overall rate of upstate New York. A large reason for the decline in manufacturing employment was the closing of IBM's facility in the Town of Ulster. Considering the magnitude of that loss, the comparative 1.6% decline in share for the last business cycle (covering the period 1990-2001), overall, in our County was not as bad as some might have expected. However, this should be put into the context of a poorer performance overall on the major job growth metrics, relative to the U.S. economy as a whole.

<b>Ulster County</b>			
	<b>1990-2001</b>	<b>2001-2005</b>	<b>1990-2005</b>
Construction	-0.3%	0.5%	0.2%
Manufacturing	-1.6%	-3.0%	-4.6%
Retail Trade	1.4%	-0.1%	1.2%
Finance & Insurance	-1.7%	0.2%	-1.5%
Admin. & Waste Serv.	1.0%	0.7%	1.7%
Health Care & Social Asst.	3.3%	0.2%	3.5%
Accommodation & Food Serv.	0.8%	0.4%	1.2%
Other Serv.	0.6%	0.5%	1.0%
<b>Hudson Valley</b>			
	<b>1990-2001</b>	<b>2001-2005</b>	<b>1990-2005</b>
Construction	0.1%	0.6%	0.7%
Manufacturing	-3.6%	-0.6%	-4.2%
Retail Trade	0.0%	-0.1%	-0.1%
Finance & Insurance	-0.8%	0.1%	-0.6%
Admin. & Waste Serv.	0.5%	0.4%	0.9%
Health Care & Social Asst.	2.5%	0.4%	2.9%
Accommodation & Food Serv.	-0.2%	0.4%	0.2%
Other Serv.	0.4%	0.1%	0.5%
<b>New York State</b>			
	<b>1990-2001</b>	<b>2001-2005</b>	<b>1990-2005</b>
Construction	-0.2%	0.0%	-0.1%
Manufacturing	-5.4%	-1.6%	-7.0%
Retail Trade	-0.7%	0.0%	-0.7%
Finance & Insurance	-0.5%	0.1%	-0.3%
Admin. & Waste Serv.	1.3%	0.1%	1.3%
Health Care & Social Asst.	2.2%	0.8%	3.0%
Accommodation & Food Serv.	0.2%	0.2%	0.4%
Other Serv.	0.4%	0.0%	0.4%
<b>U.S.</b>			
	<b>1990-2001</b>	<b>2001-2005</b>	<b>1990-2005</b>
Construction	0.5%	0.3%	0.8%
Manufacturing	-3.7%	-1.9%	-5.6%
Retail Trade	-0.6%	-0.1%	-0.7%
Finance & Insurance	-0.3%	0.1%	-0.2%
Admin. & Waste Serv.	1.8%	0.2%	1.9%
Health Care & Social Asst.	1.4%	0.9%	2.3%
Accommodation & Food Serv.	0.5%	0.5%	1.0%
Other Serv.	0.1%	0.0%	0.1%

Basic Data Source: BLS

Table 3. Change in share of total jobs by industry sector

Outside of the manufacturing sector, Ulster County also lost employees in the finance and insurance sectors over the past 15 years, but that loss occurred during the last business cycle. Since 2001, this industry has grown slightly, which is important for the availability of business services to all businesses (existing, relocating, or starting-up).

### Trends in Personal Income Growth per Person

Another important metric which is typically used to gauge the degree of relative economic success for a region versus its peers is total personal income per person. The per-person personal

income measure is used to standardize income growth performance between peer regions. The regions may vary significantly in size, such is the case when comparing Ulster County to the Hudson Valley Region, or to the country as a whole.

Table 4 presents the comparative total personal income growth data for all regions, including data for Ulster County, the Hudson Valley Region, upstate New York, and national averages for 1990-2004.<sup>15</sup> From the table, the data show Ulster County registered the slowest overall personal income growth performance over both 1990-2004 and 1990-2001 (corresponding to the last complete national business cycle). Although Ulster County posted a slightly faster rate of personal income growth than the Hudson Valley Region during 2001-2004, Ulster County's personal income growth rate was roughly equal to the upstate New York average. However, for the same period, the personal income growth rate for both Ulster County and upstate New York were at least one full percentage point per year slower than the national average.

		Ulster County	Hudson Valley Region	New York State	U.S.
<b>Total Personal Income</b>					
	1990	\$3,117,886	\$55,001,002	\$237,921,299	\$4,861,936,000
	2001	\$4,726,452	\$94,046,831	\$377,171,882	\$8,716,992,000
	2004	\$5,104,843	\$101,103,673	\$408,373,093	\$9,717,173,000
<b>Measures of Change:</b>					
	1990-2004 Annual Average	3.6%	4.4%	3.9%	5.1%
	1990-2001 Annual Average	3.9%	5.0%	4.3%	5.5%
	2001-2004 Annual Average	2.6%	2.4%	2.7%	3.7%
<b>Source: Bureau of Economic Analysis, U.S. Department of Commerce</b>					

**Table 4. Comparative growth in total personal income, 1990-2004**

The comparative total personal income growth data are consistent with the analysis of per-person personal income over the same period (1990-2004), (see Table 5). Here, the data show Ulster County registered the slowest overall personal income per person growth performance relative to its peer regions during both 1990-2004 and 1990-2001 (corresponding to the last complete national business cycle). However, the Hudson Valley Region was an exception during 1991-2000, where the rate of per-person personal income growth was the same. **Ulster County posted a slightly faster rate of personal income growth per person compared to the Hudson Valley Region during 2001-2004.** Additionally, the personal income growth rate during this same period trailed upstate New York's rate of growth. Similar to the total personal income growth benchmark for the same period, the personal income growth rate per person for both Ulster County and upstate New York trailed the national average.

<sup>15</sup> County-level personal income estimates were available only through calendar year 2004.

		Ulster County	Hudson Valley Region	New York State	March 2007 U.S.
Per Capita Personal Income	1990	\$18,777	\$27,089	\$22,267	\$19,477
	2001	\$26,479	\$42,625	\$34,240	\$30,574
	2004	\$28,076	\$44,828	\$36,737	\$33,090
<b>Measures of Change:</b>					
1990-2004 Annual Average		2.9%	3.7%	3.6%	3.9%
1990-2001 Annual Average		0.5%	0.5%	0.6%	0.7%
2001-2004 Annual Average		2.0%	1.7%	2.4%	2.7%
Percent of U.S. Per Capita Personal Income	1990	96.4%	139.1%	114.3%	100.0%
	2001	86.6%	139.4%	112.0%	100.0%
	2004	84.8%	135.5%	111.0%	100.0%
Change in Share (in Percentage Points)		-11.6%	-3.6%	-3.3%	---

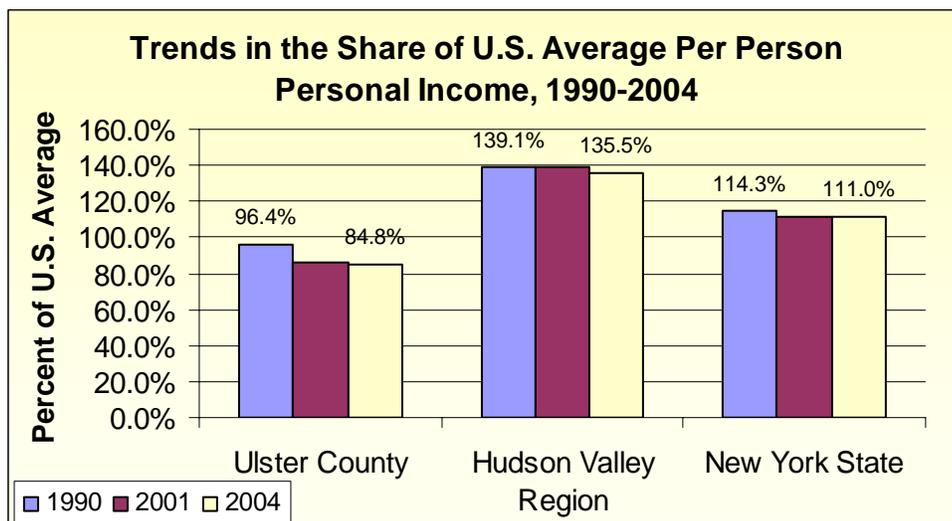
**Source: Bureau of Economic Analysis, U.S. Department of Commerce**

**Table 5. Comparative growth in personal income per person, 1990-2004**

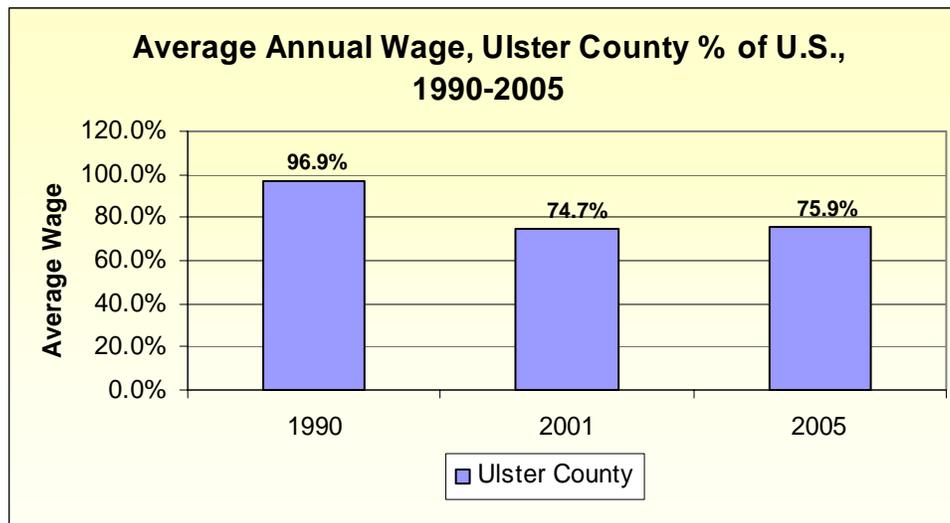
As a result, Ulster County’s per-person personal income percentage of the national average per-person personal income fell from 96.4% in 1990 to 84.8% in 2004. This decline of 11.6 percentage points is roughly three times the rate of decline experienced by Hudson Valley Region and upstate New York during the same period.

**Trends in Wage Growth and Average Wages**

The comparative total personal income growth and per-person personal income growth data are consistent with Ulster County’s comparative wage data when compared to the national average, according to the Quarterly Census of Employment and Wages (QCEW). During 1990-2005, average wages in Ulster County consistently tracked well below the national average for all jobs “covered” by the state’s unemployment insurance compensation program (\$22,530/Ulster County versus \$23,262/U.S. in 1990, and \$30,751/Ulster County versus \$40,499/ U.S. in 2005). In fact, the relative level of Ulster County’s average wage paid to its workers declined during 1990-2005 from 96.9% of the national average in 1990 to 75.9% of the national average in 2005. The 75.9% reading for Ulster County in 2005 was not as low as the 74.7% reading that occurred at the end of the last national recession in 2001. However, the 15-year decline of 21 percentage



points represents a near tripling of the relative loss in position experienced by both the Hudson Valley Region and upstate New York peer regions over that period.



### Implications for Economic Development

The comparatively sub-par job, personal income, per-person personal income, and average wage growth performances are well known in the region. These benchmarks point to the difficult economic adjustments Ulster County and Hudson Valley Region have experienced over the past 15 years. Adversity often over-shadows opportunity, especially in the near-term time horizon. Developments in technology have reduced the importance of proximity to markets for high value-added professional services. **The region's relatively high quality of life means Ulster County is well positioned to take advantage of the increasing importance of off-time activities and leisure pursuits that many talented, highly skilled workers and their families demand.**

Focused efforts on key sectors that fit the current and prospective formula for competitive success in Ulster County may offer opportunities to re-capture lost ground in economic performance over the past 15 years. The remainder of this plan intends to take the reader through the process of defining this success. Additionally, this plan describes the development process and details of the Inventory of Strategies, which take advantage of Ulster County's strengths and opportunities and address its weaknesses and threats.

### Identifying and Understanding Ulster County's Key Industries

This section of the economic assessment went through an extensive analytical process to identify and then characterize Ulster County's key industries. The "key industries" are defined as those industries in Ulster County that are dollar-importing (e.g. sell a product of service outside of the County and/or otherwise bring new dollars into Ulster County's economy such as travel and tourism), and which have a significant presence in Ulster County's existing employment base (e.g. have greater than 250 employees). By this definition, **key industries make the most significant contributions to expanding the size of Ulster County's economic pie**, and typically have some of the highest job and income growth multipliers (sometimes called the

“economic ripple effect”). Key industries provide the best prospects for future economic growth and stability. Economic development strategy efforts often focus on key industries to determine how to best support their development and expansion.

The analytical processes and structure used in this plan are complex and difficult to understand. They use a mixture of approaches, including location quotient analysis, shift-share analysis, and cluster analysis, to identify the key industries. Please refer to Appendix A for a full description of the various analytical processes used and the conclusions reached in this part of the plan.

A high-level listing of candidate key industry and industry clusters is shown in Appendix A, Table A- . This corresponds to what Ulster County Strategic Economic Development Planning Steering Committee called the “6,000-foot view.” The candidate key industries, industry clusters workings, and inter-connections require further investigation to clarify strategic economic development approaches.

## The Characteristics of Successful Economic Development Programs

### **Economic Development Best Practices**

This section outlines and briefly presents economic development best practices based on a review of literature. According to the Local Government Commission, economic development is most successful when used in an integrated approach. While this can mean that all aspects of the community should work together (e.g., government, business, education), it also means that economic strategies are best when used in conjunction with other strategies (2004). Many practices in this report consider integration. Practices that do not consider integration may be combined with other best practices to achieve results that are more effective.

### **Offer Financial Incentives**

According to Safrit & Thomas, financial incentives are often used to help close a tight deal (2002, p.6). Acknowledgement that economic assets already present in the community are often the most valuable has led to the belief that incentives are most effective if offered first to local, existing businesses before outside businesses hoping to enter the area (Local Government Commission, 2004). Interstate competition for assets with incentives may not benefit the economy overall as the gain of one state often comes at the loss of another. It is important for states to use different forms of analyses to determine the effectiveness of their offered incentive programs. Incentives do not always need to be directly financial. In fact, many states are using regulatory reform in the place of monetary incentives to promote economic development (Chi, 2000).

### **Emphasize Work Force Development**

Creating new or skilled jobs is only part of a successful economic equation. There must be a pool of workers who possess the proper attributes to fill and thrive in those jobs. For workers and employers to be as effective as possible, immediate work force development opportunities must exist to augment worker skills necessary to fit new needs of the economy. In the U.S., this practice is most commonly implemented via work force development departments (Safrit & Thomas, 2002) or local initiatives.

### **Create Sustainable Practices**

This is a new practice in the world of economic development. Sustainability in economic development practices refers to "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (Grunkemeyer & Moss, 1999). Sustainable development has spawned the idea of eco-tourism, among others, which is very popular in many developing countries, especially those in Latin America.

### **Promote Livable Communities**

Often considered part of the sustainable development rubric, livable communities promote the idea of "compact development," (Local Government Commission, 2004, ¶11), which is effective in minimizing economic, social, and environmental costs, and makes better use of resources from existing communities.

### **Use Measurable Outcomes**

Successful economic regions use benchmark outcomes to monitor plan implementation. Measuring outcomes give organizations quantitative data so they know if their actions are effective. Federal Reserve Board Chairman, Ben Bernanke has described outcomes as providing the kind of "reality check only hard data can provide" (2006, ¶2). Indicators should measure social, ecological, and economic successes instead of focusing exclusively on one area. The results from all three types of these indicators are vital for effective sustainable development.

### **Focus Locally**

It is becoming increasingly common in economic development to focus at a local level, usually referring to the county level, rather than a state or even national level. This strategy focuses on keeping already existing enterprises in the community. The local focus however, should not mean that there would be no collaboration. Regional or statewide collaboration can be an effective tool (Local Government Commission, 2004). Despite the fact that economic development is becoming increasingly globalized, local character continues to be important. The fact remains that certain regions have higher percentages of particular industry types than others do. For example, North and South Carolina have more textile related companies than most regions (Porter, 1998). The effects of "*glocalization*" (Ventriss, 2002, p.82), a term describing the replacement of the nation-state by the regional area in global economics, appear to be a reality. This has had many implications, such as the large amount of foreign owned companies in the Eastern United States, and the intense bidding wars for foreign investment that have occurred between states and/or regions in the U.S.

### **Advance Cluster-based Economic Development**

Clusters are geographically bound groups of similar or complementary businesses. Cluster firms can be effective because they have efficient business transactions, reduced expenditures, and rely on a larger base of knowledge and tailored services. Clusters can be used to promote industries that may not exist in the community, thus filling a gap, by placing them with other industries that can assist them (The NGA Center for Best Practices, 2006). Focusing economic development on clusters can ensure high quality in all aspects of the good or service from raw materials to manufacturing. Clusters also allow for innovation at a lower cost. There is usually some reason for clusters starting in a specific location, but once located they have a self-repeating cycle of

success. Clusters are vulnerable; however, to both internal rigidities and external threats (Porter, 1998).

### **Develop Technology Incubators**

Technology incubators improve the start-up success of businesses by providing different types of aid to selected new and emerging businesses. A local university can incubate businesses by providing human capital, research, and development aids. It is unrealistic to expect incubators to function quickly, or radically change the number of jobs in an area. Incubators' success may depend on converting a number of low skill/low paying jobs to higher skilled/higher paying ones. "Put succinctly, it is the clusters of skilled talent that may be the most beneficial factor in generating economic wealth in a region" (Gurdon & Ventriss, 2006, p.42).

### **Best Practices Conclusion**

This section presented an overview of current economic development best practices according to a review of literature. The research suggests that a variety of approaches implemented in an integrated and complimentary manner will produce the best results. Perhaps, ironically, the most innovative economic development tools and strategies tend to leverage the local attributes of a particular region even as the overall economy globalizes.

### **Results of Economic Development Resources Inventory Assessment**

This section addresses an objective assessment of Ulster County's economic development resources. As such, it is another foundational piece of the plan's integrated research effort.

### **Resource Survey Summary**

As part of Ulster County's strategic planning effort, an objective analysis of economic development resources—including both assets and challenges—was conducted. The assessment identified what Ulster County has to support economic development, business growth, and job creation. It also identified key barriers to progress and helped determine:

1. Strengths of the region
2. What the region is currently and potentially lacking in the area of economic development resources
3. Economic development resource areas with issues that need addressing through economic development policy and other efforts

The process utilized a web-based survey that was developed and disseminated between August 2006 and November 2006. The survey received 109 responses, with about 40% of those responses from export-based businesses (e.g. those selling their product and/or service outside of Ulster County), and roughly 60% from businesses who served local markets within Ulster County. A majority of the respondents represented a cross-section of motivated business owners, and representatives of other stakeholder groups, directly and indirectly involved with economic development in Ulster County, and were emailed a link to the survey directly (i.e., they were targeted for response). Twenty-five people found and responded to the survey located on the Ulster County Development Corporation's website, *Strategic Economic Planning 2006-*

2007 section.<sup>16</sup> The compiled survey results are included in Appendix B, Part 1 – Web-based; Appendix B, Part 2 – Targeted; Appendix B, Part 3 – Combined (complete data set).

Respondents to the questionnaire do not represent a probability sample of Ulster County's businesses; therefore, caution should be exercised in making inferences to Ulster County's entire population of businesses. The results of this assessment; however, do meet an "informed judgment" standard. The emphasis for economic development purposes was on the views of the export business respondents, although responses between the local businesses and export businesses were consistent in virtually all cases.<sup>17</sup>

The assessment provides useful information about key economic development resource areas. In addition to the assessment, other research revealed significant additional information about the assets and challenges in Ulster County related to development resources. This information is integrated with the survey results as part of a cohesive view of Ulster County. Although multi-dimensional, the assessment approach was a systematic, rigorous review of Ulster County's economic development resources strengths and weaknesses.

The results of this assessment were combined with the following:

- Data analysis
- Collaborative Community Engagement results
- Targeted follow-up work with key stakeholder groups
- Targeted interviews with a small group of Ulster County's businesses

Collectively, these data sources provided an important reference point for the strategy development work of the Collaborative Community Engagement Process' Strategy Development Task Force (hereafter the "Strategy Development Task Force"). From this information, the Strategy Development Task Force developed a prioritized list of strategies (Inventory of Strategies), which include suggested action steps. The Inventory of Strategies is designed to address issues of retaining/creating high quality job opportunities and make sustainable improvements in Ulster County's quality of life. Additionally, it enables Ulster County's economic development service organizations, community development stakeholders, and strategic community partners to take advantage of opportunities and address challenges.

This assessment covered a total of six resource categories related to economic and community development, which included the following resource areas:

- Human Capital
- Financial Resources
- Natural Resources
- Physical Infrastructure
- Industrial/Commercial Site Inventory
- Institutional Resources

An inventory of all resources important to economic development was created. Each resource area was then rated by a comprehensive set of attributes listed and described below. As with any

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<sup>16</sup> <http://www.ulsterplanning.info/>

<sup>17</sup> On notable exception was the view by local businesses that the municipal development review climate was more predictable than their export business counterparts.

typology of this kind, not all resource items directly corresponded to the attributes listed below. However, the typology fit the analytical needs of this planning effort.

- **Availability/Access:** How available were the key resources in Ulster County that were being rated? Was access to the identified resource acceptable or unacceptable in Ulster County?
- **Cost:** A second area rated included the relative “cost” of the resource. For example, was—in the opinion of the respondent—the cost of the resource affordable or unaffordable in Ulster County?
- **Quality:** Another important part of the assessment process involved judging the “quality” of the resource base in Ulster County. Each resource area was rated for quality according to three categories: (1) very poor, (2) poor, (3) good, or (4) very good.

In the case of the Human Capital resources category, several specific questions were asked about the respondent’s view of the readiness and capabilities of Ulster County’s work force, its work ethic, and non-technical social skills (e.g. which were indicative of workers’ ability to effectively work in a “team environment”). In addition, several categories—including Natural Resources, Institutional Resources, and Constructed Resources—included assessments as to whether or not those resources had a positive impact on economic development in Ulster County.

## Summary of Findings

Ulster County’s economy is in a favorable condition in terms of its economic and community development resources. Ulster County was rated to have some significant economic development resource strengths—including a strong work ethic and a very “high quality of life”—which are growing increasingly important in the competitive equation for successful economic development. Despite those important strengths, respondents noted several exceptions, including an almost unanimous view that affordable work force housing is a major obstacle to economic development in Ulster County. These strengths and areas that need improvement are summarized below.

### A. Ulster County’s Key Strengths

- An available work force with a solid work ethic
- Access to quality K-12 educational resources
- Excellent environmental quality and access to four-season recreational resources
- Access to quality health care—albeit expensive
- An excellent quality of life
- Access to major markets by road, rail, and air transportation
- Access to competitively priced debt capital sources

### B. Areas That Need Improvement

- Work force availability in Ulster County in higher skilled occupations
- Training in basic communication and interpersonal skills to improve performance in team-oriented work environments
- Access to higher education (above the Associate’s degree level) and training for the skill sets in demand by Ulster County’s labor market

- Equity and venture capital resources for technology related opportunities. Sweat equity and organic growth remain the main funding sources for innovation and entrepreneurs in Ulster County
- Local approvals and the time required to complete the local development review process
- Cooperation between municipalities and state agencies to address “predictability” concerns that are currently part of the development review process
- Creative ways of addressing critical timing issues for highly desirable development projects
- Ensuring Ulster County’s economic development assets are properly configured to meet the long-term commercial and industrial development needs of its current and potential key industry sectors
- Ulster County’s system of technical and “soft-support services” to support entrepreneurs in an increasingly competitive environment
- Assistance to technology-related companies dependent upon external primary research capacities (e.g. from higher educational institution resources)

The assessment of Ulster County’s economic development resource areas are described in further detail below.

## **1. Human Capital Resources**

The availability and skills of Ulster County’s work force were reviewed in this section.

Discussions about the depth and affordability of work force were followed by interviews of employers in Ulster County’s key industry sectors. The following findings emerged:

- Ulster County has limited availability of a ready and able work force with skill sets needed for businesses to compete
  - Nearly half export business respondents reported difficulty finding workers with the skill sets they need to be successful
  - This was true even though more than 80% of export businesses report they regularly look for workers with at least a 4-year post-secondary degree in their hiring efforts
- Workers are available for the jobs-occupations that require a high school diploma and some post-secondary education (up to an associate’s degree level) and training. However, the level of technical skills (including basic machining skills) needed for several of Ulster County’s key industry categories to succeed, are generally unavailable
- Workers have a good work ethic for a reasonable level of pay. There is some evidence of attitudinal problems among workers (such as frequent absenteeism) and underdeveloped inter-personal skills that are needed in a team environment
- There is limited availability of a professional and technical work force required by employers in the high value-added professional, scientific, and technical services sectors
- The cost of labor is generally inexpensive, relative to jobs in comparable sectors in surrounding regions and at the national level
- Ulster County has high quality higher education programs, but they are not generally in-line with the needs of employers in export businesses
  - Some of this local misalignment appears to be an artifact of policies of the SUNY system. The full range of education and training and new graduates required by key

employers in Ulster County is inadequate, because development of new business is occurring in regions outside of the County

- Seasonal employment demands in the resort and recreational sector create a unique set of issues—availability of adequate staffing for weekend, holiday, and traditional vacation times

## **2. Financial Resources**

The second area examined accessibility and cost of financial resources needed to support Ulster County's economic development and entrepreneurship. Difficulty in gaining access to affordable equity and early-stage debt financing for entrepreneurial activity and small- and micro-business is a common problem in emerging sectors throughout Ulster County (except for relatively few areas where a critical mass of successful activity of this type is found). Various capital types were reviewed, including debt capital sources, equity capital, grants, and other financial resources that were thought to be important for Ulster County's (and Hudson Valley Region's) entrepreneurs to start and grow a business. The examination included a broad assessment of Ulster County's access, affordability, and quality across the full range of financial resource needs. Financial resource findings are described below.

- The availability and affordability of financial resources to support economic development is improving in the region, with the beginnings of an angel network tied to the new technology incubator
- Availability and affordability of debt capital versus equity capital varies greatly
  - Debt capital for traditional secured types of lending is widely available from Ulster County's financial institutions and is generally affordable to businesses in the County's key industry sectors
  - The cost of debt capital is competitive with peer regions
- USDA and SBA loan guarantee programs are generally available for start-ups and small business development and growth in Ulster County
- Equity capital has much more limited availability throughout Ulster County, and so-called "early-stage equity capital" is extremely limited for most start-ups
  - Equity capital investors tend to be parochial and tend to favor specific geographic areas (e.g. Silicon Valley in CA, Route 128 Corridor in MA, Research Triangle in NC, and/or U.S. money centers)
  - Equity capital investors generally do not make significant investments in small markets like Ulster County
- Equity investment deal flow is low, and even an Ulster County-based funds-angel investor network will likely need to operate in a geographic area larger than just Ulster County to help reduce portfolio risk and assure the "viability" of those funds over the long term

## **3. Natural and Constructed Resources**

Examination of natural resources included rivers, ponds, lakes, and the naturally-occurring winter/summer inventory of regional recreation assets in natural resources. For constructed resources, the examination included assets and issues such as the quality and cost of utilizing the

region's recreational resources, access to retail, access to and the cost of cultural and historical amenities/attractions. Natural and constructed resources findings are explained below.

- Ulster County residents have good access to high quality natural recreation resources (e.g. lakes and rivers), and outdoor recreation opportunities/assets
  - Respondents listed these recreational assets and amenities as an important reason why they decided to invest and grow their businesses in Ulster County
- The quality and cost of Ulster County's recreational resources was rated acceptable by a nearly unanimous response
- Ulster County's residents have acceptable access to good quality cultural and historical resources that appear to be positively linked to the County's travel and tourism sector
- Good access to cultural choices and the arts exists, which at least in part may be due to Ulster County's close proximity to New York City's cultural and arts attractions
- Access, quality, and affordability of state and County services was rated acceptable, with generally higher ratings for Ulster County's social services
- Quality and access to grades K-12 school was rated acceptable by a 3-1 margin, but significantly fewer respondents rated the affordability of Ulster County's K-12 schools as acceptable
- Ulster County's natural resources are not as important as a resource input (as a factor of production) as they are for quality of life of the workers (and owners/decision-makers) who work at those businesses (e.g. trees for lumber rated lower than trees for recreation)
  - Ulster County has reasonably good access to retail. This appears to be a very important quality of life advantage for Ulster County residents, compared to other parts of the northeast and upstate New York where this access is not as robust

#### **4. Physical Infrastructure**

Physical infrastructure assessment included Ulster County's resources such as the roads, highways and bridges, air transportation assets, water system quality, wastewater treatment capabilities, cost-access to state-of-the-art telecommunications, housing and the affordability of housing, and the cost and reliability of basic utilities. Physical infrastructure findings are described below.

- The surface road-bridge transportation network was rated as well-developed, providing good access to local businesses, and national and global markets for Ulster County's export businesses
  - Ulster County's access to reliable air transportation was rated lower than the surface transportation network
- Ulster County has good access to affordable, potable water supplies
- Ulster County has adequate wastewater capacity-availability (including septic), despite some apparent spot deficiencies
- Cost and reliability of electric power in Ulster County was rated somewhat lower than the above infrastructure categories. However, acceptable ratings on access, cost, and quality of electric power outdistanced unacceptable ratings by more than 3 to 1

- Access to telecommunications services and the cost of those services are generally adequate for commerce in non-rural parts of Ulster County—but the availability of telecomm services is not consistent
  - More than 40% of export business respondents indicated that access to affordable telecommunications was at least moderately important to the success of their businesses
  - The cost of telecomm service is an issue for certain parts of Ulster County, especially in more rural areas
- Ulster County has high quality solid waste management and waste disposal services
- Ulster County has experienced housing affordability problems dating back to the late-1990s
  - A majority of responses pointed out that un-affordable housing prices are beginning to constrain economic development in Ulster County. This inference is supported by the recent work of the Ulster County Housing Consortium as stated in its 2005 Housing Strategies report

## 5. Industrial and Commercial Site Inventory

This resources assessment also examined the inventory of available industrial and commercial space in Ulster County. It is no secret that there is a significant amount of un-occupied space in Ulster County. There is some question as to whether or not this space is suitable and affordable for both new and potentially emerging businesses, or for goods-services exporting and/or dollar-importing industries of strategic importance. The results of this assessment included:

- Ulster County has available vacant buildings and suitable industrial space that could be employed to meet short-term economic development needs, even though it may not be optimally configured for current strategic industry sectors
- There is limited availability of adequate space and open land resources for commercial and industrial development in some areas of Ulster County
- There is some business incubator space available in Ulster County for technology businesses
  - Ulster County has a need for additional early development space for entrepreneurs, and micro- and small start-up businesses taking the first step beyond the garage- or experimenting-phase of development

Beyond the economic development resources survey assessment process, the Collaborative Community Engagement process held in mid-October also pointed out that there is significant and growing tension between the perceived need to preserve the region's natural, constructed, and open space resources, and the need for affordable undeveloped land that can be employed in economic development activities. There is significant sentiment for advance (or pre-emptive) land use planning for economic development, retail, housing, and other commercial-cultural uses in Ulster County.

## 6. Institutional Resources

The final area of the assessment included an evaluation of Ulster County's institutional resources: education, economic development services system, churches, service organizations, health care facilities, and others that could directly or indirectly impact Ulster County's economic development. These were examined and rated to identify potential partners for

implementing this plan's strategies. From this assessment, the following findings were discovered:

- Ulster County is generally well-positioned in its infrastructure of social, religious, and service organizations to support economic development
- Quality economic development services are available from a mix of federal, state, regional, and county agencies for most of the key sectors in the region. They generally meet most of the needed services for economic development, with some overlap
  - Ulster County's chief economic development service organization (UCDC) appears under-staffed and lacks sufficient financial resources relative to the need and level of demand for their services
- Quality health care is widely available and priced similarly to the rest of the nation
- Total state and municipal taxes are generally viewed as too high (at least in certain parts of Ulster County) for the County to be considered a "friendly environment" for entrepreneurs and growing or new small businesses
- Ulster County has a relatively "broad and deep" list of non-profit and social services organizations that can be important assets for strategic partnering in this strategic economic development plan
- Respondents were split between the acceptability and affordability of quality support services (e.g. soft services) to assist entrepreneurs and small businesses seeking to grow
- Ulster County lacks in-house planning capacity at the municipal level, which results in planning and zoning inconsistencies and, at times, makes the development review process unpredictable

## **7. Technology Resources**

This assessment concerns technology resources available in Ulster County that are typically needed to support development and growth of technology-based/ technology-intensive businesses. The assessment examined factors that make Ulster County a suitable location for both the operation and development of technology-oriented businesses. Areas such as the availability of higher education, laboratory research facilities, business-to-education partnerships, and research internships are examples of resources that were examined. The following technology resources findings were made:

- Technology and technology transfer resources are currently very limited for businesses in Ulster County
- Limited technology resources are provided mostly through relationships with higher education institutions some distance away, such as the Rensselaer Polytechnic Institute
- Ulster County is not well-positioned for most types of technology-oriented businesses. There is no "recognized" primary research capacity (e.g. a higher education primary research lab facility with developed expertise) in Ulster County or the immediate vicinity, outside of what the private sector does on its own
- Funding to support technology development is limited to the current, relatively new incubator facility effort. Businesses that are not part of the incubator do not take advantage of those services

## Business Interviews

As part of this assessment, a questionnaire was developed to obtain a greater understanding of key factors and forces affecting the competitiveness of key companies in Ulster County's current and prospective key industry sectors. The questionnaire was tested in December of 2006 in two business interviews, and was deemed functional based on those interviews. The questionnaire covered the following areas:

- business in general
- organizational structure
- suppliers, customers, and competitors
- views of markets, forces
- factors that represented opportunities and challenge
- factors that underpin businesses long-term success
- what businesses need that they are not getting from Ulster County's economic development services delivery network
- how businesses see their part of the economy and the overall economy fare over the next 6-12 months

The interviews tested the questionnaire as a tool to facilitate useful communication between the economic development services system and Ulster County's key businesses in key export industries. The questionnaire is intended to be a means for the economic development services providers to begin and continue a line of structured communications with economic developers. Continuous communication and feedback will allow the economic development service providers in Ulster County to constantly evaluate and re-evaluate the programs and forms of economic development assistance provided to the County's businesses (see Analysis of Services Delivery Infrastructure section for further information).

Structured communication is a crucial part of a flexible and entrepreneurial economic development services delivery system. It is necessary if the system is to continuously evolve and improve itself as the needs of its constituent businesses evolve. Structured communication is the best way for the economic development services delivery system to:

1. adjust and fine-tune existing economic development programs to meet the needs of Ulster County's most promising opportunities, and
2. identify the need for and effectively design new and more effective programs.

## Analysis of Services Delivery Infrastructure

An analysis of Ulster County's current economic development services delivery infrastructure consisted of compiling a list of 16 service providers and identifying their roles and responsibilities. Though not included as one of the 16 service providers, the Ulster County Planning Department and Ulster County as a whole are considered an integral part of the County's economic development system. These entities provide funding and/or economic development support to several of the 16 service providers listed below. The information collected on the service providers, along with research of ongoing initiatives and best practices, resulted in the design of current and notional economic development service delivery systems.

## Roles and Responsibilities

This section presents an inventory of service providers that partly or wholly exist to foster economic development in Ulster County. The profiles of the 16 economic development service providers included:

- An assessment of their programs and initiatives
- Collaboration among the service providers (what service providers do together)
- Limitations to collaboration in bylaws (what keeps service providers from working together, such as legal structures)
- Basic funding, staff, board, and location information

Appendix C illustrates these profiles in a Roles and Responsibility Matrix. Appendix D contains a listing of the 16 service providers, along with other economic development agencies throughout the State. Additionally, Appendix E contains a listing of political office holders, effective September 29, 2006.

## Three Pronounced Themes Among Profiled Service Providers

Three of the most pronounced themes observed in the work of the service providers are:

- **Environmental focus**
- **Attracting businesses and developers through financial incentives**
- **Orientation towards attracting and building high-tech, post-industrial, and knowledge-driven industries**

The Catskill Watershed Corporation, Environmental Facilities Corporation, and the New York State Energy Research and Development Authority are all mission-driven, and in some cases, state mandate driven to actualize economic development that reduces environmental degradation and/or increases energy efficiency.

The Empire State Development Corporation, New York's lead economic development entity, designates Empire Zones that offer myriad tax breaks, tax rebates, capital credits, and other financial inducements designed to lure start-ups and established businesses to those specific areas. UCDC leverages and coordinates with the Empire Zone program by serving as a point of entry for the Kingston Ulster Empire Zone.

The recently formed Hudson Valley Center for Innovation, through the collaborative efforts of UCDC and the Hudson Valley Technology Development Center, serves as an incubator for technology development firms and other high-value businesses. The Hudson Valley Economic Development Corporation, primarily a commercial marketer, specifically targets the following industries: semiconductor and microelectronics, biotech and pharmaceutical, information technology, and finance and insurance.

## Opportunities for Improvement

The Environmental Facilities Corporation runs the statewide Beginning Farmer Loan program, which provides starter capital for new farmers. **There is little evidence; however, of a concerted effort among the economic development agencies reviewed to bolster the existing agricultural base in Ulster County, or address the needs of the sector into the future.**

UCDC maintains a Creative Economy page on their website and hosted meetings on the subject in 2005. Creative Economy efforts generally need alignment at a variety of levels (government, non-profits, private agencies, private business, etc.) to gain any traction. The acknowledgement of growth potential in knowledge-based industry is evident in the innovative focus of many of the economic development agencies profiled. A broad perspective and an interrelated approach

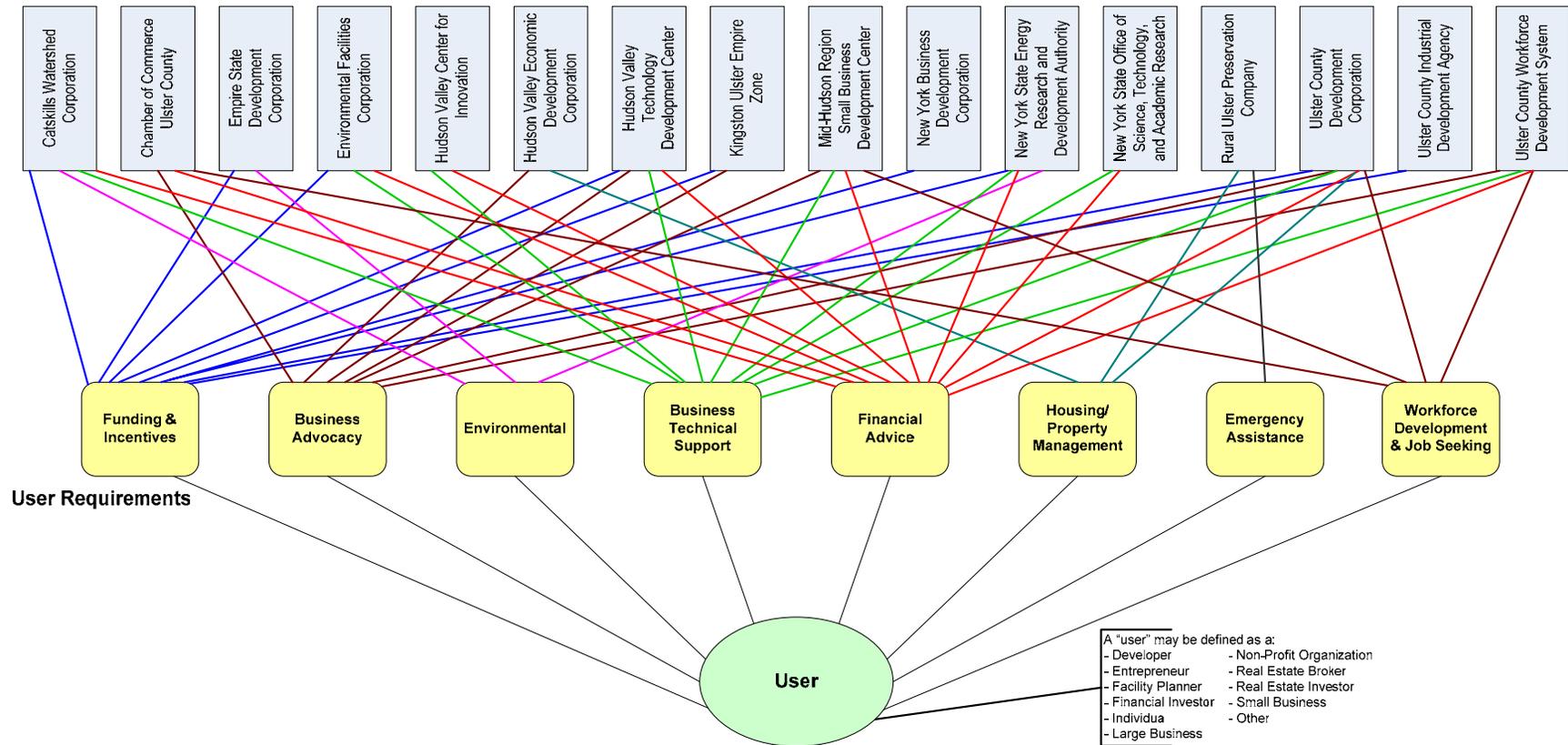
is required to build upon the strength of Ulster County's existing assets in the areas of the arts, creative based industry, and local attributes that drive tourism. This approach is also required to attract the work force necessary for Ulster County to support such industries, and may serve as a unifying force for current economic development work.

### **Formulation of an Improved Economic Development Service Delivery System**

The current economic development services delivery infrastructure consists of myriad of service providers and functions. **Analysis revealed a complex structure with no recognizable standardized process** (see Figure 2). A user may enter the system at any number of points, seeking advice from any number of agencies. Information may or may not be shared by agencies, resulting in duplication of efforts, repeated processes, and confusion.

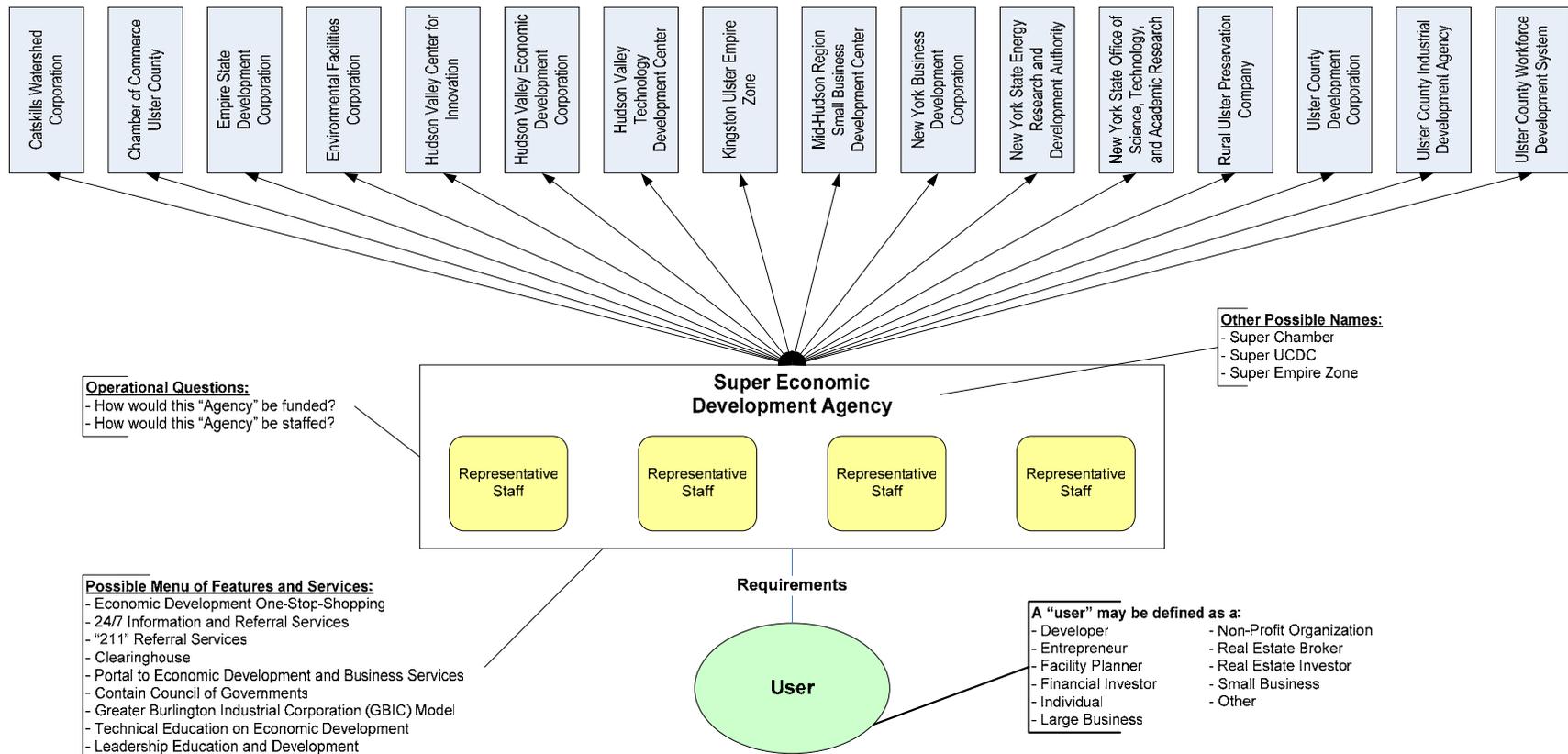
A streamlined system would introduce process into the structure through the creation of a "Super Economic Development Agency" (see Figure 3). A streamlined system brings together representatives from each service provider to create an efficient and effective "body of knowledge," capable of addressing any user's needs in a collaborative manner. There would be one, and only one, user point of entry. Here, the agencies would collaborate and implement their processes simultaneously to meet users' needs, reducing duplication and confusion, while increasing ease of use. A communication plan would structure communication across agencies and between the "Super Agency" and users, thereby producing more efficient and effective results.

**Service Providers**



**Figure 2. Current Ulster County Economic Development Services Delivery Structure**

**Service Providers**



**Figure 3. Notional Ulster County Economic Development Services Delivery Structure**

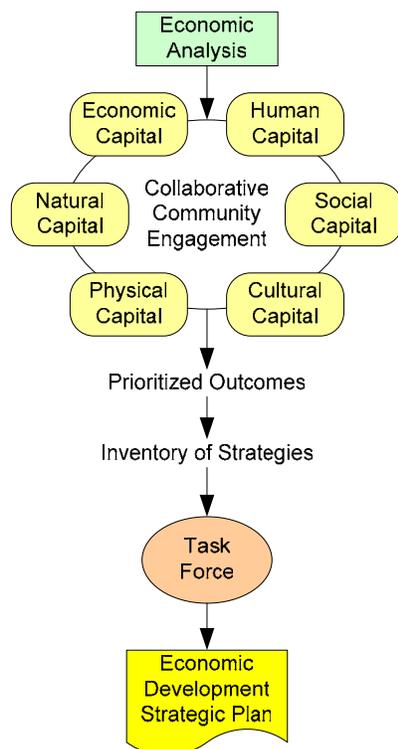
## PUBLIC ENGAGEMENT: COLLABORATIVE COMMUNITY ENGAGEMENT PROCESS

### Key Points in This Section

- This community engagement process included nearly 70 people and was unique to Ulster County
- Community participants heard a variety of presentations and developed outcomes consistent with the vision
- Community members prioritized those outcomes and developed strategies
- The Steering Committee refined those strategies and developed preliminary action steps
- Implementation teams will further develop the action steps

### Collaborative Community Engagement Overview

The Ulster County Strategic Economic Development Planning Steering Committee, Cope & Associates, Inc., and Economic & Policy Resources, Inc. implemented a Collaborative Community Engagement (CCE) process at the Kingston Holiday Inn in Kingston, New York on October 12 – 14, 2006. Approximately 63 citizens from around Ulster County attended the event (see Appendix F for a listing of attendees).



The CCE combines best ideas from three large-scale change methodologies, Future Search (Weisbord & Jannoff, 2000), Citizens’ Jury (Coote & Lenaghan, 1997), and Appreciative Inquiry (Anderson, et al, 2001), (Cooperrider & Whitney, 1999), (Cooperrider, Sorensen, Whitney, & Yaeger, 2000). These schools of thought produce actionable solutions to complex problems in diverse environments. A Future Search brings together selected groups of people who identify, prioritize, and address common ground actions required to realize a desired vision (Weisbord & Jannoff, 2000). A Citizens’ Jury™ consists of randomly selected individuals who are presented with data from varied opinions, deliberate on the data, and issue a report that addresses key questions presented to them at the beginning of the process (Coote & Lenaghan, 1997, p. 8-12), and (Jefferson Center, n.d., Citizens Jury Process, ¶3). The Appreciative Inquiry (AI) methodology seeks to create a constructive, positive union between all participants in capacities such as achievements, strengths, opportunities, traditions, and visions of valued and possible futures. Taking all of these ideas together as a gestalt, AI deliberately seeks to work from accounts of this “positive change core,” assuming that every living system has many

untapped and rich and inspiring accounts of the positive (Cooperrider & Whitney, n.d.).

Strategic economic development plans requires support from an array of data from a multiplicity of sources. Ulster County’s CCE process utilized both data research and the collective minds of subject matter experts and decision-makers. It brought together stakeholder groups capable of

making decisions to analyze diverse data and create a prioritized list of outcomes required to build a vibrant economy for Ulster County.

The idea for the CCE is based on two facets of developing sound economic development strategies. First, the process must be inclusive, diverse, effective, and efficient. Second, economic data, current and emerging trend information, and opposing opinions must be elements of the community engagement foundation. An expanded explanation of the CCE is contained in Appendix J.

The CCE was a formal, facilitated process requiring inputs (information), processing (CCE deliberation), and outputs (outcomes). Input to the process included regional research data, Ulster County business survey data, and subject matter expert presentations to lay the groundwork and to provide data for discussions. Processing took place through a series of dialogues in stakeholder and mixed groups.

Selected individuals with different perspectives on economic issues provided the inputs. **The project Steering Committee recruited over 65 individuals from across Ulster County, representing a microcosm of its population.** Individuals were assigned to various community capital groups (Roseland, 2005, p. 4-14) to craft strategies relevant to their groups. Trained facilitators guided and managed the process using a formalized structure. Over the course of 3 days, CCE participants generated outcomes applicable to each capital group that they believed were important in the strategic planning process for Ulster County's future economic development.

The facilitators used their copyrighted, flexible card system, allowing participants to assign priorities to the overall set of economic development outcomes. These prioritized outcomes became the inputs for the subsequent Task Force meetings. Each capital group appointed one of its members to a Task Force. The Task Force convened on November 16, 2006 to examine the collective outcomes of the CCE and draft strategies that would become the **Inventory of Strategies** for economic development in Ulster County. These strategies were then vetted through the Steering Committee and presented back to the public in a public forum on March 7, 2007.

## Collaborative Community Engagement Description

Leading up to the CCE event, the following preparatory work was completed.

### *Recruitment*

- Determined broad categories for organizing stakeholders, ideas, and outcomes during the CCE process
- Recruited as broad a cross-section of the Ulster County population possible to represent varying views and opinions about future development

### *Demographic Survey*

- CCE members were asked to complete a demographic survey (results are shown in Appendix H)
- Demographic information was used to create stakeholder groups with as much diversity as possible, from the pool of citizens invited by the Steering Committee

### *Economic Resources Survey*

- This survey was open to all CCE participants and the general public of Ulster County

- The survey sought to determine what citizens thought of current economic resources and what they desired for development
- The survey remained open until November 22, 2006

#### ***Detailed CCE Event Planning***

- A plan was developed to guide participants through their discussions and the development of their economic development outcomes
- Figure 4 on the following page illustrates the process for these discussions

#### ***CCE Participants' Read-Ahead Materials***

- The following materials were sent as background data to all CCE members before the event:
  - Collaborative Community Engagement Agenda
  - Collaborative Community Engagement Glossary of Terms
  - Collaborative Community Engagement Process
  - Ulster County Economic Development Context (working draft document, for comment)
- These documents gave participants a brief background of the Collaborative Community Engagement process and high-level information about the economic development context for Ulster County

## **Collaborative Community Engagement Activities**

Please refer to Figure 4 for the following explanation of the CCE event.

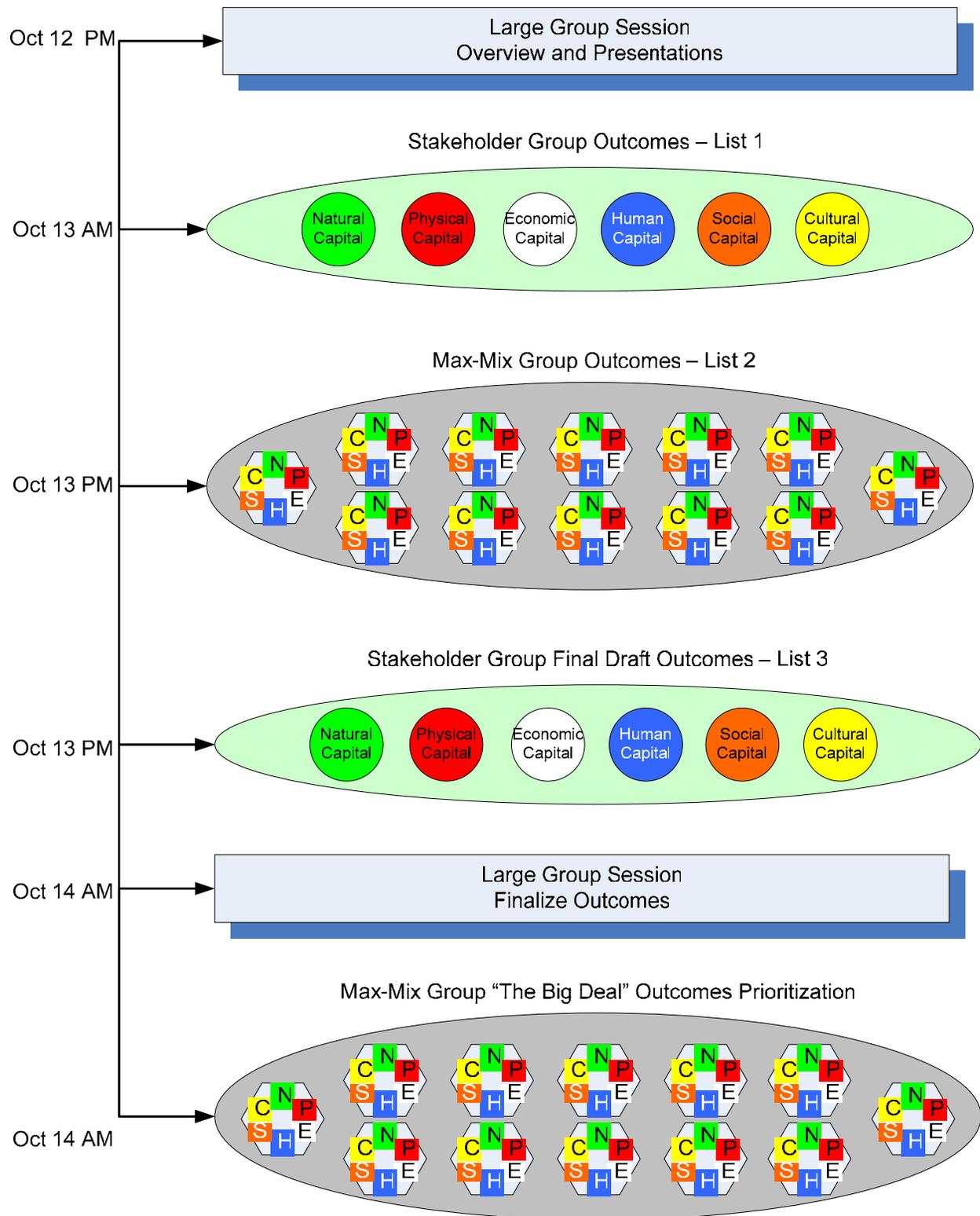


Figure 4. Collaborative Community Engagement Process

## **Presentations**

Eight subject matter experts presented to CCE members on the first day of the CCE. The purpose of the presentations was to present current economic development information, to provide a benchmark for what similar communities are doing, and to present differing views for consideration during ensuing discussions. A listing of the presenters and their bios are contained in Appendix I.

## **Stakeholder Group Outcomes**

CCE members began their discussions in stakeholder groups, focused on developing outcomes they believed important to Ulster County's economic development in the next 5-10 years.

## **Max-Mix Group Outcomes**

CCE members continued discussions in smaller max-mix groups with one person from each stakeholder group represented at every table. During this activity, CCE members changed or added to the list of outcomes developed by stakeholder groups. The results were "common ground" lists of what was seen to be important to future development in Ulster County.

## **Stakeholder Group Final Draft Outcomes**

Stakeholders met at the end of the day to review changes from the max-mix discussions. Here, they grouped like-items and made final draft edits to their outcomes. Afterwards, they were dismissed for the day. During the evening, the consultants compiled all of the lists into a single spreadsheet and generated *Big Deal* cards for the next day's prioritization activity.

## **Stakeholder Group Presentations**

Each stakeholder group presented its outcomes to the large group at the beginning of the third day. Based on their final observations and discussions, and input from the large group, the outcomes were finalized. At the end of these presentations, primary and alternate Task Force members were selected from each stakeholder group. A list of Task Force members and the qualities desired in their selection are contained in Appendix J.

## **Outcomes Prioritization (*The Big Deal*)**

For the final activity, CCE members were once again split into max-mix groups. Using COPE's *The Big Deal*© methodology, CCE members prioritized all of the outcomes (see Appendix K for further information about *The Big Deal*©). This process followed three steps:

1. Prioritize outcomes within each stakeholder group
2. Prioritize the #1 outcomes from each of the six stakeholder groups
3. Prioritize the stakeholder groups

The prioritization process posed difficult choices. CCE members had trouble deciding one item's importance over another and many "grouped" priorities resulted. Choosing priorities is imperative to Ulster County's ability to make further difficult choices about where to allocate finite funds and resources as strategies develop and implementation planning begins. Prioritized outcomes and CCE members' comments are included in the Prioritized Outcomes section.

## Task Force Results

The Task Force convened on November 16, 2006. Facilitators led the members through a series of discussions revolving around five major strategy areas. The group discussed each of the strategies, their needs, goals, sub-goals, and responsibility leads.

The Steering Committee reviewed and revised Task Force results on January 20, 2007. The results, including strategy timelines, are described in the subsequent section, Inventory of Strategies.

## Prioritized Outcomes

### Ulster County Strategic Economic Development Planning Overall Outcomes Ranking

Ranking	TOPIC	CARD #	OUTCOME	SCORE	SD
1	Economic Capital	E9	Collaborative Plan for Balanced Growth	10	0.46
2	Natural Capital	N4	Asset-based Planning Framework	10	0.71
3	Social Capital	S1	Solidify Structure to Integrate Communications	17	0.99
4	Social Capital	S5	Asset-based Framework	18	1.49
5	Human Capital	H6	Access to Capital for Entrepreneurs	21	1.60
6	Physical Capital	P2	Examine Existing Infrastructure	21	2.77
7	Physical Capital	P1	Four Shovel-Ready Sites	24	2.62
8	Social Capital	S2	Diversity Training	26	1.58
9	Physical Capital	P5	Diverse Housing Mix	27	1.51
10	Cultural Capital	C1	Adaptive Reuse for Historic Preservation	27	2.13
11	Economic Capital	E3	Infrastructure Development	28	0.76
12	Social Capital	S4	Periodic Jury Process	29	0.92
13	Economic Capital	E7	Retain & Nurture Business	29	3.07
14	Economic Capital	E2	Diverse Housing Mix	30	1.04
15	Social Capital	S3	Community Listening Sessions	30	1.49
16	Cultural Capital	C11	Culturally-Oriented Center	30	2.76
17	Human Capital	H1	Research Institution	31	2.03
18	Human Capital	H5	Increase Wage Levels	31	2.30
19	Human Capital	H3	Adult Training & Development	32	1.93
20	Human Capital	H4	Younger Educated Workforce	36	1.93
21	Cultural Capital	C14	Dollar Value to Intangible Cultural Impact	36	2.62
22	Economic Capital	E6	Reduce Home Rule Barriers	39	2.53
23	Natural Capital	N9	Countywide Inventory of Shovel-Ready Sites	39	3.60
24	Human Capital	H10	Strengthen Activities to Attract People	40	2.51
25	Human Capital	H9	Market Diversity in Communities	40	2.67
26	Physical Capital	P6	Use Under-Utilized Empty Structures	42	2.55
27	Cultural Capital	C9	Attract Cultural Entities	44	2.51
28	Physical Capital	P11	Green Adaptive Resources	46	1.28
29	Economic Capital	E1	Upgrade, Consolidate Community Resources	50	1.75
30	Natural Capital	N5	Increased Support to Local Plans & Zoning	50	3.28
31	Physical Capital	P4	Develop Health Care Specialties	51	2.45
32	Cultural Capital	C12	Eclectic Cultural Communities	51	3.07
33	Natural Capital	N12	Farmland Protection Plan	51	3.70
34	Cultural Capital	C8	Success of Existing Cultural Entities	53	4.07
35	Economic Capital	E5	Health Care Attraction	55	1.25
36	Natural Capital	N3	Encourage Non-Consuming Businesses	56	4.11
37	Human Capital	H2	Corporate Mentoring Program	57	1.25
38	Cultural Capital	C7	Cultural & Traditional Development Zones	57	4.79
39	Physical Capital	P7	Consolidate Municipal Services	59	2.56
40	Natural Capital	N2	Balance Conservation & Growth	59	4.93
41	Natural Capital	N8	Tangible & Intangible Values	59	5.66
42	Economic Capital	E8	Independent Presenter	61	1.51
43	Economic Capital	E4	Slow Aging Population	61	1.85
44	Cultural Capital	C10	Create Community Foundation	63	3.56
45	Natural Capital	N13	Growth Area Water Quality	64	2.88
46	Physical Capital	P3	Corridor Between Kingston & Benedictine Hospitals	66	2.60
47	Cultural Capital	C5	Develop Cultural Zones	68	4.66
48	Physical Capital	P8	Include Cultural Resources	69	2.56
49	Cultural Capital	C4	Cultural Resources Annual Event	69	3.02
50	Natural Capital	N6	Recreation Operations	69	3.20
51	Physical Capital	P9	New York State Mandate Comprehensive Plans	71	3.80
52	Physical Capital	P12	Healthy & Diverse Housing Mix	72	4.11
53	Natural Capital	N11	Target Low Impact Industries	73	3.56
54	Natural Capital	N1	Support for Agro/Eco Tourism	73	3.76
55	Cultural Capital	C2	Zoning for Adaptive Reuse	73	3.80
56	Natural Capital	N10	Green Building Standards	77	1.85
57	Natural Capital	N14	Economically Feasible Pollution Reduction	80	2.93
58	Physical Capital	P10	Light Rail	81	2.59
59	Natural Capital	N7	Increased Natural Resources Education	81	3.09
60	Cultural Capital	C6	Develop Priority Growth Zones	83	4.41
61	Cultural Capital	C13	Include Cultural Assets	92	2.33

**# 1 Ranked Outcome in Each Capital Group**

Ranking	TOPIC	CARD #	OUTCOME	SCORE	SD
1	Economic Capital	E9	Collaborative Plan for Balanced Growth	10	0.46
2	Natural Capital	N4	Asset-based Planning Framework	10	0.71
3	Social Capital	S1	Solidify Structure to Integrate Communications	17	0.99
4	Human Capital	H6	Access to Capital for Entrepreneurs	21	1.60
5	Physical Capital	P2	Examine Existing Infrastructure	21	2.77
6	Cultural Capital	C1	Adaptive Reuse for Historic Preservation	27	2.13

**Ranked Capital Groups**

Ranking	TOPIC	SCORE	SD
1	Natural Capital	11	0.52
2	Economic Capital	21	1.69
3	Human Capital	28	1.31
4	Physical Capital	29	0.74
5	Cultural Capital	38	1.39
6	Social Capital	41	1.36

Overall Comments:

Table 8: Priorities Across Capital Areas:

1. Do a plan
2. Shovel-ready sites
3. Healthy HR mix

CAPITAL GROUP	CARD #	OUTCOME	Table #	Similar To /Same As/ Combine With	Comment
Natural Capital	N1	Support for Agro/Eco Tourism	3	N2, N3, N5	
Natural Capital	N2	Balance Conservation & Growth	1		Change "tweak" to "create"
			2		No one voice speaks for all. Jury might be a model. Need non-partisan unified voice.
			3	N1, N3, N5	
			6		Should say "bodies"; define "tweak"
			8		Discard; we don't know what this is
Natural Capital	N3	Encourage Non-Consuming Businesses	1	N11	
			3	N1, N2, N5	
			8	N11	
			11	N10, N11	
Natural Capital	N4	Asset-based Planning Framework	3	N6, N9, N12, N13	
			5	N8, N9	
			8		Global
			8	N8	
			11	N5, N9	
Natural Capital	N5	Increased Support to Local Plans & Zoning	3	N1, N2, N3	
			11	N4	
Natural Capital	N6	Recreation Operations	2		Change "recreation operations" to "recreation opportunities"
			3	N4, N9, N12, N13	
Natural Capital	N7	Increased Natural Resources Education	3	N10	
			8		Need Ulster County in ? Ulster County resources
Natural Capital	N8	Tangible & Intangible Values	5	N4	
			6	N9	
			8	N4	
Natural Capital	N9	Countywide Inventory of Shovel-Ready Sites	3	N4, N6, N12, N13	
			5	N4	
			6	N8	
			8	N13	
			11	N4	
Natural Capital	N10	Green Building Standards	3	N7	
			10		Must provide incentives to pay for it
			11	N3	
Natural Capital	N11	Target Low Impact Industries	1	N3	Discard; combine with N3
			8	N3	
			10	N3	
Natural Capital	N12	Farmland Protection Plan	3	N4, N6, N9, N13	
Natural Capital	N13	Growth Area Water Quality	1		Add "quantity" after "quality"
			3	N4, N6, N9, N12	
			8	N9	
Natural Capital	N14	Economically Feasible Pollution Reduction			

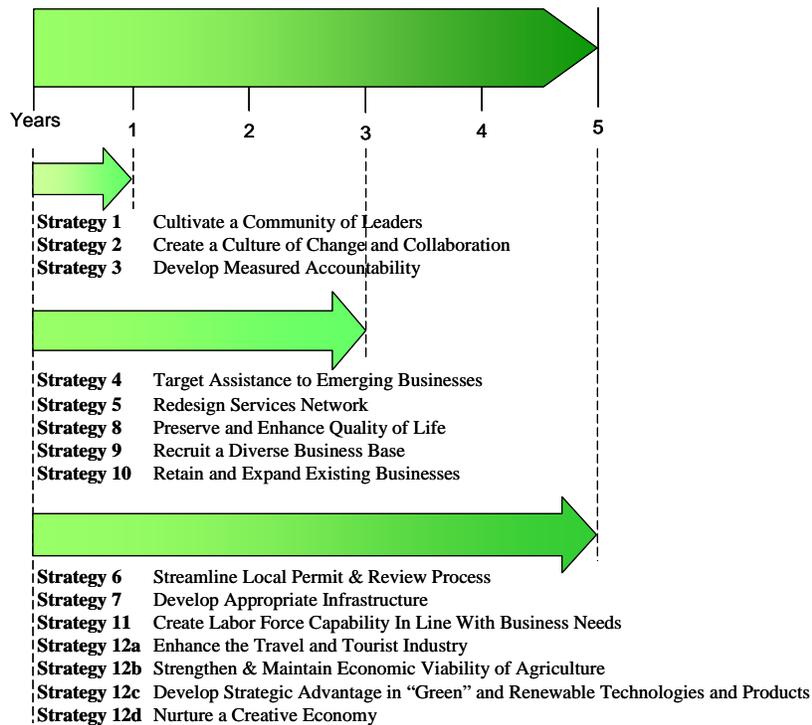
CAPITAL GROUP	CARD #	OUTCOME	Table #	Similar To /Same As/ Combine With	Comment
Physical Capital	P1	Four Shovel-Ready Sites	6	N6, N11	As part of the comprehensive plan
			10		
Physical Capital	P2	Examine Existing Infrastructure	1		Eliminate bulleted examples Strike out examples Drop examples
			3		
			6		
			11		
Physical Capital	P3	Corridor Between Kingston & Benedictine Hospitals	1	P4	Discard; sub of P4
			6		
			11		
Physical Capital	P4	Develop Health Care Specialties	1	P3	
			11		
Physical Capital	P5	Diverse Housing Mix	1	P12	Discard; combine with P12; add P8 & P9
			2		
			3		
			5		
			6		
			11		
Physical Capital	P6	Use Under-Utilized Empty Structures	1	P11	Discard; sub of P11
			5		
			6		
			11		
Physical Capital	P7	Consolidate Municipal Services			
Physical Capital	P8	Include Cultural Resources	1	P9, P12	Subs of P12 Discard; include cultural resources
			5		
Physical Capital	P9	New York State Mandate Comprehensive Plans	1	P8, P12	Subs of P12 Discard; NY State mandates comp plan Might not be doable by NY state. Don't take all of home rule away regarding land use decisions
			5		
			6		
Physical Capital	P10	Light Rail	11		Expand with public transportation
Physical Capital	P11	Green Adaptive Resources	1	P6	P11 has subcategory P6
			6		
			11		
Physical Capital	P12	Healthy & Diverse Housing Mix	1	P5,P8, P9	Discard; dupe of P5 Discard; Housing mix, repeats P5
			2		
			3		
			5		
			6		
			10		
Economic Capital	E1	Upgrade, Consolidate Community Resources	8		Efficiency agreement...?
			11		
Economic Capital	E2	Diverse Housing Mix	11	E5	
Economic Capital	E3	Infrastructure Development	8		Add "planning"
Economic Capital	E4	Slow Aging Population	1		Discard; Action step under a future strategy
Economic Capital	E5	Health Care Attraction	11	E2, E7	
Economic Capital	E6	Reduce Home Rule Barriers	1		Discard; Action step under a future strategy Change to use some other language; local municipalities should work together
			2		
			11		
Economic Capital	E7	Retain & Nurture Business	1		Discard; Action step under a future strategy Complementary to each
			10		
			11		
Economic Capital	E8	Independent Presenter	8		Can't be successful without all involved Reword: The body that presents the collaborative plan must be credible and knowledgeable.
			11		
Economic Capital	E9	Collaborative Plan for Balanced Growth	11	E6, E8	

CAPITAL GROUP	CARD #	OUTCOME	Table #	Similar To /Same As/ Combine With	Comment
Human Capital	H1	Research Institution	10		Could be private, business focus
Human Capital	H2	Corporate Mentoring Program	1		Explained by stakeholder; H2 - expose kids to workplace opportunities to keep them here
Human Capital	H3	Adult Training & Development			
Human Capital	H4	Younger Educated Workforce			
Human Capital	H5	Increase Wage Levels			
Human Capital	H6	Access to Capital for Entrepreneurs			
Human Capital	H9	Market Diversity in Communities			
Human Capital	H10	Strengthen Activities to Attract People			
Social Capital	S1	Solidify Structure to Integrate Communications			
Social Capital	S2	Diversity Training			
Social Capital	S3	Community Listening Sessions			
Social Capital	S4	Periodic Jury Process			
Social Capital	S5	Asset-based Framework			
Cultural Capital	C1	Adaptive Reuse for Historic Preservation	1	C2	
			3	C2	
			5	C2	
			11	C2	
Cultural Capital	C2	Zoning for Adaptive Reuse	1	C1	Combine C1 & C2, keep C1 as primary card
			3	C1	Discard; repeat of C1
			5	C1	Discard
			11	C1	
Cultural Capital	C4	Cultural Resources Annual Event	1		Discard
Cultural Capital	C5	Develop Cultural Zones	1	C6, C7	
			2	C7	
			5		Discard
Cultural Capital	C6	Develop Priority Growth Zones	1	C5, C7	
			2		Discard; not cultural--don't want it to drag down other priorities
			5		Discard
Cultural Capital	C7	Cultural & Traditional Development Zones	1	C5, C6	
			2	C5	Discard
			5	C13	
Cultural Capital	C8	Success of Existing Cultural Entities	1		Discard
			5	C12	
Cultural Capital	C9	Attract Cultural Entities			
Cultural Capital	C10	Create Community Foundation	1		Discard; already happening
Cultural Capital	C11	Culturally-Oriented Center	11	C13	
Cultural Capital	C12	Eclectic Cultural Communities	5	C8	
Cultural Capital	C13	Include Cultural Assets	1		Discard
			5	C7	
			8		Discard
			11	C11	
Cultural Capital	C14	Dollar Value to Intangible Cultural Impact			

## INVENTORY OF STRATEGIES

An Inventory of Strategies (Inventory) is the genesis of the Ulster County’s strategic economic development plan. The Inventory is a culmination of efforts from the Collaborative Community Engagement, Task Force, and Steering Committee inputs. The following table provides a listing of the strategies by group with estimated timelines shown below.

Engaged Leadership	Doing Business for Prosperity	Ingredients for Success	Targeting Key Sectors
<b>Strategy 1:</b> Cultivate a Community of Leaders	<b>Strategy 4:</b> Target Assistance to Emerging Businesses	<b>Strategy 8:</b> Preserve and Enhance Quality of Life	<b>Strategy 12a:</b> Enhance the Travel and Tourist Industry
<b>Strategy 2:</b> Create a Culture of Change and Collaboration	<b>Strategy 5:</b> Redesign Services Network	<b>Strategy 9:</b> Recruit a Diverse Business Base	<b>Strategy 12b:</b> Strengthen & Maintain Economic Viability of Agriculture
<b>Strategy 3:</b> Develop Measured Accountability	<b>Strategy 6:</b> Streamline Local Permit & Review Process	<b>Strategy 10:</b> Retain and Expand Existing Businesses	<b>Strategy 12c:</b> Develop Strategic Advantage in “Green” and Renewable Technologies and Products
	<b>Strategy 7:</b> Develop Appropriate Infrastructure	<b>Strategy 11:</b> Create Labor Force Capability In Line With Business Needs	<b>Strategy 12d:</b> Nurture a Creative Economy



The following pages detail each strategy by describing its need, an overall goal, a strategy owner, and an estimated timeline. Each strategy is broken down further into sub goals with potential action steps. Strategy owners will be responsible for validating the timelines and developing comprehensive action steps.

## Engaged Leadership

### Strategy 1: Cultivate a Community of Leaders

**Need:** In order for the County to implement its plans and hold itself accountable, a community of leaders will need to be cultivated and trained.

**Overarching Goal:** Establish a community of skilled and articulate leaders who understand economic development, can sustain the County’s vision for economic development, and can lead all efforts for implementation now and in the future.

**Lead Responsibility:**

- Steering Committee
- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Ulster County Government
- Chamber of Commerce of Ulster County
- Representatives from each Collaborative Community Engagement (CCE) Stakeholder Group

**Timeline:** 0 to 12 months

GOALS	POTENTIAL ACTION STEPS
<p>a. Sustain the momentum through the implementation of this strategic economic development plan by expanding and not sun-setting the Steering Committee.</p>	<ol style="list-style-type: none"> <li>1. Evaluate the membership of the current Steering Committee to determine additional skill sets needed</li> <li>2. Expand the membership to include additional skill sets in communications and marketing, fund raising, and representation from each of the CCE Stakeholder Groups</li> <li>3. Develop and adopt a charter, a common vocabulary, and set of ground rules for a newly constituted “Implementation Committee”</li> <li>4. Develop and publish a meeting schedule</li> <li>5. Consider adding two youth members from the 18-24 year old population</li> </ol>
<p>b. Gain consensus on a shared vision for economic development in the County.</p>	<ol style="list-style-type: none"> <li>1. Market the economic development vision so that it is a shared vision throughout the County</li> <li>2. Share the vision with all planning and community organizations</li> <li>3. Publish the vision Countywide</li> <li>4. Let the vision drive all activities. Measure new ideas and recommendations against the vision to ensure its sustainability</li> </ol>
<p>c. Develop an understanding of what true leadership is in the context of economic development.</p>	<p>Hold a <i>Symposium on Leadership in Economic Development</i>.</p> <ol style="list-style-type: none"> <li>1. Establish a separate working committee to oversee the Symposium</li> <li>2. Bring in a notable keynote speaker</li> <li>3. Use the Symposium as a training ground for current and future leaders as well as a springboard for support for the plan</li> <li>4. In the working session, ensure that ample attention is paid to skill building in public participation, community visioning, managing strategic change, trust building, communications, and the qualities of effective community leaders</li> <li>5. Consider making the Symposium an annual event by adding plan updates, working sessions, and a training component</li> </ol>

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| d. Develop an understanding of the nature of change and hone skills in managing strategic change. | <ol style="list-style-type: none"> <li>1. Conduct two half-day training sessions for the Implementation Planning Committee on managing strategic change. Open the invitation to board members and other key stakeholders from other planning and community organizations</li> <li>2. Teach principles behind systemic change and dialogue, which will be essential to the overall success of the implementation plan</li> </ol>  |
| e. Develop an understanding of the success factors required to implement any large-scale change.  | <ol style="list-style-type: none"> <li>1. Identify success factors required to implement any large-scale change</li> <li>2. Assess and then identify any success factors that are lacking</li> <li>3. Work actively and aggressively to attain those success factors</li> </ol>  |
| f. Utilize existing leadership programs to develop future community leaders.                      | <ol style="list-style-type: none"> <li>1. Complete a feasibility study including a benchmarking study and partnership analysis for an <i>Institute for Community Leadership</i></li> <li>2. Depending on the results of the feasibility study, either develop a freestanding Countywide program or a partnership model for the cultivation and perpetuation of leaders in the region</li> <li>3. Build a network of “alumni” from the current rosters of planning organization past board members, Symposium attendees, and institute graduates to help perpetuate future boards with skilled and knowledgeable members</li> </ol> |
| g. Develop skills in conflict resolution.   | <ol style="list-style-type: none"> <li>1. Conduct two half-day training sessions for the Implementation Committee on conflict resolution. Open the invitation to board members and other key stakeholders from other planning and community organizations</li> <li>2. Learn to use resistance to change as a County resource</li> </ol>  |
| h. Develop a common language among community members for economic development.                    | <ol style="list-style-type: none"> <li>1. Expand and circulate the current glossary of economic development terms</li> <li>2. Ask all planning organizations to vote the acceptance and use of these terms</li> <li>3. Have all organizations add the glossary to their web sites and board materials</li> <li>4. Submit glossary to local papers for publishing or as a resource</li> </ol>   |
| i. Identify champions of change in the County.  | <ol style="list-style-type: none"> <li>1. Develop an awards program in conjunction with the Chamber to showcase local and regional champions of change</li> <li>2. Establish incentives for individuals and organizations who demonstrate successful change management</li> <li>3. Recognize individuals and organizations that implement and sustain the vision for economic vitality in the County</li> <li>4. Model what you want</li> </ol>  |

## Strategy 2: Create a Culture of Change and Collaboration

**Need:** Effective implementation of the strategic economic development plan will require changes in behavior, attitude, processes, systems, communications, and skills. It will also require collaboration among many organizations, as well as input from many individuals.

**Overarching Goal:** Create a positive culture and climate that supports the implementation of the strategic economic development plan and the sustainability of the County’s vision for economic vitality.

**Lead Responsibility:**

- Steering Committee
- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Ulster County Government
- Chamber of Commerce of Ulster County
- Representatives from each CCE Stakeholder Group

**Timeline:** 0 to 12 months

GOALS	POTENTIAL ACTION STEPS
<p>a. Increase understanding among County citizens that strategic economic development is the key to a healthy economy that leads to sustainable improvements in their quality of life.</p>	<ol style="list-style-type: none"> <li>1. Develop an innovative, deliberate, and planned comprehensive communication program that coordinates internal and external communications for all parts of the Implementation Plan</li> <li>2. As part of the internal communication strategy, identify types of message, their purpose, owners, recipients, frequency, and mode/channel</li> <li>3. As part of the external communication strategy, seek input from appropriate business leaders, economic development community, education partners, and citizens to develop an outreach plan                         <ol style="list-style-type: none"> <li>a. Use data to develop and refine communication messages</li> <li>b. Develop innovative methods for external communications                                 <ol style="list-style-type: none"> <li>1. Work with local radio stations and SUNY to develop pod casts as a way of reaching younger and future leaders of the County</li> <li>2. Maintain and improve the current project website as the clearinghouse for economic development news and innovations and add links from other stakeholder groups to the site</li> </ol> </li> <li>c. Develop public relations campaign to inform businesses and the community of the new system</li> <li>d. Establish benchmarks to evaluate progress for public information program. Design, evaluate, and review benchmarks as needed</li> <li>e. Assign elements of the plan to the appropriate committee for tracking</li> </ol> </li> <li>4. Create interesting business education programs for middle and high schools                         <ol style="list-style-type: none"> <li>a. Identify/acquire target materials (e.g. “Learn-to-Earn CD, etc.)</li> <li>b. Define criteria for Pilot Program success</li> <li>c. Identify school districts/individual schools for pilot program</li> <li>d. Raise necessary funds for distribution (a critical mass of no fewer than 5 schools is preferred for the first stage)</li> <li>e. Evaluate the success of Pilot Program</li> <li>f. Expand or end program as appropriate</li> </ol> </li> <li>5. Establish annual event to celebrate economic accomplishments in the County                         <ol style="list-style-type: none"> <li>a. Feature high profile speaker</li> <li>b. Present progress report to acknowledge successes and clear challenges for the future</li> </ol> </li> </ol>

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| b. Develop an articulated vision on what “a culture of collaboration” would look like.   | <ol style="list-style-type: none"> <li>1. Invite Task Force Members to a facilitated meeting of the Implementation Committee and get consensus on an articulated vision of what “a culture of collaboration” would look like</li> <li>2. Submit an article to the local paper as part of the follow up to this project telling the community what that vision is and affirming its importance to echo the work of the Collaborative Community Engagement</li> </ol>  |
| c. Develop an understanding of the importance of trust to true collaboration and develop an intolerance to behaviors that undermine trust and collaboration. | <ol style="list-style-type: none"> <li>1. As part of the <i>Symposium on Economic Development Leadership</i>, dedicate one session to defining, understanding, and building trust among all participants in a manner that supports their building trust in turn within their own organizations</li> <li>2. Demonstrate intolerance to behaviors or commentaries that undermine trust and collaboration</li> <li>3. Lead by example</li> </ol>  |
| d. Get consensus on a set of ground rules for all groups and individuals to follow that support a culture of collaboration.                                  | <ol style="list-style-type: none"> <li>1. Develop a common set of ground rules for all planning organizations to use</li> <li>2. Ask each planning organization to vote their approval of the ground rules</li> <li>3. Have planning organizations discuss and determine as part of a regular agenda what they are willing to collaborate on in terms of projects and processes</li> <li>4. Share those decisions among all groups</li> </ol>  |
| e. Remove barriers to effective collaboration.   | <ol style="list-style-type: none"> <li>1. Communicate all by-law changes to all groups</li> <li>2. Conduct comprehensive review of all economic development services and planning organizations’ bylaws to remove obstacles to efficient, market-oriented operations for the economic development services delivery network</li> <li>3. Procure all by-laws, program descriptions, and operating procedures from relevant economic development services providers as outlined in the Roles and Responsibilities Analysis</li> <li>4. Analyze all by-laws, program procedures, and operating procedures to identify potentially inhibiting behaviors in economic development services delivery</li> <li>5. Complete an inventory of recommended changes</li> <li>6. Develop an implementation plan for the recommended changes</li> </ol> |
| f. Develop a method for evaluating the effectiveness of collaboration among organizations.   | <ol style="list-style-type: none"> <li>1. Using the Collaborative Community Engagement Effectiveness Survey as a model, create a “Collaboration Effectiveness Survey” to measure collaboration effectiveness among planning organizations</li> <li>2. Use web-based survey tool to field the Collaboration Effectiveness Survey every 12 months and compare results</li> <li>3. Make changes to processes, ground rules, by-laws, etc. based on the data from the Collaboration Effectiveness Survey</li> </ol>  |

g. Define economic development to include community development.

1. Undertake an intra-County marketing effort to build consensus for a broader definition of economic development to include community development and downtown development initiatives—and the need for inter-municipal cooperation
2. Examine alternative organizational structures (Council of Governments, municipal membership development corporation, etc.) for this Countywide municipal organization to coordinate and gain access to new resources to support economic and community development in the County
3. Analyze alternative structures, and recommend preferred structure that would lead to a more cohesive course of action for integrated economic and community development
4. Use the initial launching of this organization to conduct a “listening tour” to discern municipal attitudes (and define what is possible municipality-by-municipality) towards economic and community development for each municipality. Use the listening tour to bring residents together in an organized way to develop common goals for development across the County
5. Identify specific funding opportunities that could be accessed and what is required to access those funds
6. Develop a staffing plan, specific “benchmark” goals, and functions (see the list of initiatives outlined below) and sources of funds to support the goals and needed staff for the chosen organizational design
7. Develop financial projections for the first 5 years of the organization
8. Launch initiative

h. Develop mechanisms for proactively addressing community concerns.

1. Develop a list of anticipated community concerns for each aspect of the plan
2. Develop proactive steps in addressing each concern
3. Work with local editorial boards to plant seeds of change in order to increase the public’s understanding of economic development and alleviate or eliminate concerns
4. Develop plans to manage change for unpopular, but essential, activities

### Strategy 3: Develop Measured Accountability

**Need:** Effective implementation of the strategic economic development plan requires that all individuals and stakeholder groups hold themselves accountable.

**Overarching Goal:** Instill the knowledge, values, and skills necessary for community leaders, municipal leaders, staff members from planning organizations, and other stakeholders to overcome resource limitations and other barriers in order to achieve desired results.

**Lead Responsibility:**

- Steering Committee
- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Ulster County Government
- Chamber of Commerce of Ulster County
- Representatives from each CCE Stakeholder Group

**Timeline:** 0 to 12 months

GOALS	POTENTIAL ACTION STEPS
a. Develop accountability to sustain the process.	<ol style="list-style-type: none"> <li>1. As part of the <i>Symposium on Economic Development Leadership</i>, dedicate one session to defining, understanding, and establishing accountability measures among all participants in a manner that supports progress toward the vision and improves accountability within their own organizations</li> <li>2. Get consensus on a definition of “evidence-based outcomes” as it applies to economic development</li> <li>3. Develop agreement that key stakeholders and opinion leaders across Ulster County will support a shift away from “authority-based” control to accountability, which arises from personal responsibility and the use of evidence on which to base decisions</li> <li>4. Demonstrate intolerance to behaviors or commentaries that undermine personal responsibility and accountability</li> <li>5. Lead by example</li> </ol>
b. Set ground rules that support accountability for all groups and individuals to follow.	<ol style="list-style-type: none"> <li>1. Develop a common set of ground rules for all planning organizations to use</li> <li>2. Ask each planning organization to vote their approval of the ground rules</li> </ol>
c. Develop ways of measuring culture change.	<ol style="list-style-type: none"> <li>1. Develop metrics that allow organizations and stakeholders to determine objectively if culture change is taking hold, for example: revenue, business development, retention, board vacancy, and time to fill rates</li> <li>2. Publish tangible results in a timely way to sustain public engagement</li> </ol>

## Doing Business for Prosperity

### Strategy 4: Target Assistance to Emerging Businesses

**Need:** New and emerging businesses require access to well developed, integrated support services.

**Overarching Goal:** Design a collaborative approach to promote access to affordable equity and early stage debt capital.

**Lead Responsibility:**

- Ulster County Development Corporation
- Hudson Valley Center for Innovation
- Representatives from Social and Economic CCE Stakeholder Groups

**Timeline:** 0 to 3 years

GOALS	POTENTIAL ACTION STEPS
a. Complete a comprehensive assessment of early-stage financing needs.	<ol style="list-style-type: none"> <li>1. Design a “Financial Needs Assessment Survey” that may include collecting data on the following:                             <ol style="list-style-type: none"> <li>a. An estimate of early-stage financial needs for entrepreneurs (potential deal flow)</li> <li>b. An assessment of current early-stage financing activities</li> <li>c. An assessment of other special needs for the County’s entrepreneurs</li> <li>d. An assessment of ways to bring ideas and entrepreneurs together with potential investors on a regular basis</li> </ol> </li> <li>2. Launch survey</li> <li>3. Use survey data and results to develop plans for better access to affordable equity and early-stage debt capital</li> </ol>
b. Create Angel Networks.	<ol style="list-style-type: none"> <li>1. Conduct a feasibility study to identify such a network’s capital raising potential</li> <li>2. Identify the network’s institutional requirements (e.g. a non-profit separate entity, etc.)</li> <li>3. Based on feasibility study results, decide future steps to establish a link to an Angel Network</li> </ol>
c. Work with existing providers to identify any gaps in offered services.	<ol style="list-style-type: none"> <li>1. Assemble existing service providers to solicit input and identify gaps in service. Providers could include: Mid-Hudson Small Business Development Center Hudson Valley Technology Development Center Other members of the Red Carpet Team</li> <li>2. Solicit input from businesses and entrepreneurs to ask directly what services they need from the County to succeed long-term. Build on data received from the Resource Assessment Survey conducted for the Collaborative Community Engagement event</li> <li>3. Consider implementing the Resource Assessment Survey on an annual basis</li> <li>4. Identify needed services to fill gaps and to respond to businesses needs for support. Services could include:                             <ul style="list-style-type: none"> <li>▪ Guidance for funding access (both equity and debt funding, and access to applicable incentives)</li> <li>▪ Business planning</li> <li>▪ Accounting</li> </ul> </li> </ol>

d. Create a manufacturers, distributors, and assemblers support group to share both information and capacity.

- Management
- Legal
- Marketing
- Other specialized forms of technical assistance

1. Create a forum to bring interested parties together
2. Define all systemic aspects and requirements for exporters in the County
3. Map export process(es) and identify areas or steps in the process where businesses can leverage efforts to assist one another

e. Maximize the use of Tech City/Hudson Valley Business Center to provide space for businesses to locate.

1. Perform an assessment of possible uses of Tech City property aligned with the County’s vision and key industries
2. If possible, create a non-profit to act as a leasing and marketing agent for Tech City space. Consider using UCDC as this agent, as its seven-member board is made up of members from commercial real estate, manufacturing, and technology companies, and can provide intelligent oversight
3. Solicit funding from multiple entities, including, but not limited to: IDA, Central Hudson, Ulster County, State Government, (Federal ?)

f. Grow incubators focused on micro and small businesses.

Develop a center(s) for innovation in Ulster County focused on micro and small businesses. Design the center to forge strategic relationships between emerging entrepreneurial businesses and the commercialization of their goods and services

1. Establish a cooperative, multi-disciplinary Task Force under the UCDC to develop the appropriate industry concept for a facility
2. Use the Task Force to conduct a feasibility study for a center. This study should include:
  - Profiles of possible clients
  - A conceptual description of the type of on-site and virtual services that could be offered
  - The potential size of the proposed facility
  - An inventory of potential sites within the County
  - An initial capitalization plan (source of funds to start-up, finance initial operations)
  - A set of 5-year financial pro-forma income statements and balance sheets
  - An inventory of potential funding sources and a funding plan to self-sufficiency

## Strategy 5: Redesign Services Network

**Need:** County economic development and services delivery must evolve to become as flexible, entrepreneurial, and aggressive as its current and potential constituent clients operating in the economy today. The current system is primarily reactionary and is not “strategic or focused” in its approach. The system should re-organize around a market-driven approach that begins with critically important groundwork and moves into higher order efforts after this initial groundwork is completed.

### Overarching Goals:

Build partnerships with relevant local, state, and federal government entities to create an integrated, flexible, and innovative delivery system that fosters and sustains vibrant economic development. Additionally, create incentives that accommodate development, create predictability for businesses, and are inline with the community comprehensive plans.

### Lead Responsibility:

- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Ulster County Municipalities
- Ulster County Legislature
- Ulster County Planning Department
- Representatives from the Economic CCE Stakeholder Group

**Timeline:** 0 to 3 years

GOALS	POTENTIAL ACTION STEPS
a. Align service providers and user requirements with a new service delivery system.	<ol style="list-style-type: none"> <li>1. Examine current processes to determine alignment with a new system</li> <li>2. Identify requirements of a new delivery system with respect to UCDC operations and goals and other service providers</li> <li>3. Determine gaps between current and future processes</li> <li>4. Develop new process that align with UCDC’s and the County’s visions</li> </ol>
b. Develop a systemic process to pursue grant and other funding opportunities to support economic development services delivery	<ol style="list-style-type: none"> <li>1. Assess the current funding system for coverage, timeliness, responsibility, and current (or incoming) state and/or federal contacts</li> <li>2. Identify gaps (if any)</li> <li>3. Research available alternatives to fill funding gaps and systematize the current monitoring effort to improve efficiency and effectiveness</li> <li>4. Assign responsibility for ongoing monitoring and funding system coverage</li> </ol>
c. Identify links and capitalize on the unfolding High-Tech Cluster development in the Tech Valley (e.g. Albany NanoTech complex).	<p>Assign responsibility to manage the process and partner relationships to:</p> <ol style="list-style-type: none"> <li>1. Identify any County current or prospective links to the current upstate “High-Tech” initiative</li> <li>2. Identify what specific steps are needed to participate through identified links</li> <li>3. Identify resource requirements and partners needed to participate proportionally</li> </ol>

d. Align Ulster County Comprehensive Economic Development Strategy (CEDS) planning process to take advantage of Economic Development Administration (EDA) shifting funding priorities.

1. Reinvigorate the County Comprehensive Economic Development Strategy (CEDS) effort when EDA funding priorities shift back to promoting regional economic development in all parts of the country
2. Maintain the current CEDS with a minimum level of effort needed to remain “certified,” and in a format that enables the plan to be pulled off the shelf at the correct time
3. Complete an assessment of current and near-term prospects for any “new” EDA funding for the County, within the context of the current federal emphasis on re-building the Gulf Coast region

e. Build relationships with New York State Government (e.g. the Empire State Development Corporation) to identify and take advantage of new development initiatives.

1. Convene a meeting with new administration representatives and representatives from the Implementation Committee
2. Review and identify new opportunities and linkages in the developing vision for economic development under the new gubernatorial administration
3. Note similarities and differences to the County’s vision and plan

## Strategy 6: Streamline Local Permit & Review Process

**Need:** The County requires a coordinated and streamlined approach to local permitting. Fairness and predictability for key industries is required to facilitate job retention and new job creation.

**Overarching Goal:** Develop a coordinated Countywide approach to local permitting and development review.

**Lead Responsibility:**

- Ulster County Planning Department
- Ulster County Development Corporation
- Ulster County Municipalities
- Ulster County Legislature
- Representatives from the Physical and Natural CCE Stakeholder Groups

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
a. Insure that comprehensive plans include economic development.	<ol style="list-style-type: none"> <li>1. Create a “Permit Process Task Force”</li> <li>2. Assign the Task Force oversight to appropriate County organizations</li> <li>3. Develop Task Force membership criteria and identify and recruit members accordingly</li> <li>4. Draft a charter and operating agreement for the task force that would complete a review of local zoning regulations that are inconsistent with collaborative economic development efforts</li> <li>5. Communicate Task Force existence, purpose, and process to key industry targets as part of the overall communication plan</li> <li>6. Implement the charter to complete the report</li> <li>7. Distribute the findings according to the overall communications plan</li> </ol>
b. Raise the understanding of local planners and reviewers of the importance of economic development..	<ol style="list-style-type: none"> <li>1. Inventory of model initiatives to create common understanding</li> <li>2. Design a training program for local development review appointees, local planning officials, and municipal legislative bodies</li> <li>3. Hold workshops periodically (quarterly at first and then semi-annually over the longer term)</li> <li>4. Identify potential grant and other funding that could be leveraged to support new local-municipal planning capacity</li> </ol>
c. Facilitate development of up to 5 “shovel-ready” sites.	<ol style="list-style-type: none"> <li>1. Complete an inventory of candidate shovel-ready sites</li> <li>2. Complete an economic development needs assessment and suitability analysis for each site</li> <li>3. Procure necessary resources for site development</li> </ol>

## Strategy 7: Develop Appropriate Infrastructure

**Need:** Develop appropriate infrastructure (people: public transportation; things: shipping capability; information: communications; land use: development ready sites) to support quality job creation and retention in the County’s key industries.

**Overarching Goal:** Develop an infrastructure that creates and retains jobs in the County’s key industries and furthers economic development.

**Lead Responsibility:**

- Ulster County Planning Department
- Ulster County Development Corporation
- Ulster County Municipalities
- Ulster County Legislature
- Representatives from the Physical CCE Stakeholder Group

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
a. Designate priority growth areas.	Identify growth centers-zones, e.g. <ul style="list-style-type: none"> <li>▪ Warehouse distribution</li> <li>▪ Technology/ Manufacturing</li> <li>▪ Main Street</li> </ul>
b. Create infrastructure to support competitive advantage for key industry targets.	<ol style="list-style-type: none"> <li>1. Identify infrastructure gaps which inhibit competitive advantage for key industry targets:                             <ul style="list-style-type: none"> <li>▪ Transportation infrastructure (Surface including land and water)</li> <li>▪ Air transportation</li> <li>▪ Water and waste water</li> <li>▪ Electric-Fossil fuels, Other Utilities</li> <li>▪ Work force housing</li> <li>▪ Solid waste</li> <li>▪ Health care</li> <li>▪ Child care</li> <li>▪ Early education</li> <li>▪ Telecommunications</li> </ul> </li> <li>2. Assign development priorities in relation to competing projects</li> </ol>
c. Draft Countywide comprehensive plan.	<ol style="list-style-type: none"> <li>1. Identify stakeholders with regional land use interests</li> <li>2. Hold a meeting of all stakeholders to agree on designated growth centers-zones</li> <li>3. Assign responsibility for writing an overall land development plan</li> </ol>
d. Communicate infrastructure assets and needs between key industry targets and the County.	<ol style="list-style-type: none"> <li>1. Develop a communication system that identifies infrastructure assets to key industry targets and allows key industries to communicate their infrastructure needs to the County</li> <li>2. Design the communication system to ensure infrastructure messages reach all applicable parties in a timely manner                             <ol style="list-style-type: none"> <li>a. Define infrastructure messages</li> <li>b. Identify message originators and recipients</li> <li>c. Determine mode and frequency of communications</li> <li>d. Execute communications according to scheduled needs</li> </ol> </li> </ol>

e. Provide Countywide access to cable, wireless, and broadband services.

1. Design an approach with existing and potential telecommunication technology providers to distribute of telecommunication technology (both land-based and wireless) throughout the County
2. Conduct a comprehensive needs assessment across the County to identify all underserved areas
3. Identify telecom infrastructure requirements to support expanded service
4. Identify responsibility for developing and managing funding plan
5. Identify potential funding partners (Federal (SBA and or matching funds), State (money set aside via legislative mandate) local) to create an integrated, long-term funding plan. Leverage past efforts of the UCDC grant program
6. Create a phased plan to build physical infrastructure
7. Create a model contract/services provision agreement for use by all municipalities with telecom service providers

## Ingredients for Success

### Strategy 8: Preserve and Enhance Quality of Life

**Need:** Quality of life is increasingly becoming a concern for attracting and retaining businesses and a talented work force. Additionally, high performing regional economies require access to affordable housing to attract and retain a skilled work force, which is a key factor in quality of life.

**Overarching Goal:** Use social, natural, physical, and cultural resource bases to attract and retain business owners and talented, experienced workers, and improve access to housing for all income levels, and across all price levels and types.

**Lead Responsibility:**

- Ulster County Legislature
- County of Ulster Chamber of Commerce
- Ulster County Planning Department
- Catskill Watershed Corporation
- Representatives from CCE Natural, Social, Human, Economic, Cultural Stakeholder Groups
- Scenic Hudson
- Ulster County Housing Consortium
- Ulster County Municipalities
- Cornell Cooperative
- Ulster County Tourism
- Key employers in the County’s current identified key industries

**Timeline:** 0 to 3 years

GOALS	POTENTIAL ACTION STEPS
<p>a. Develop a “quality of life” enhancement agenda as a business recruitment and retention tool.</p>	<ol style="list-style-type: none"> <li>1. Identify responsibility for creating a quality of life enhancement agenda</li> <li>2. Identify partners for quality of life issues</li> <li>3. Design and implement a “Quality of Life Definition Survey” to understand what quality of life means to residents and businesses in the County:                             <ol style="list-style-type: none"> <li>a. What does “quality of life” mean to County residents?</li> <li>b. What attracted them to Ulster County and what keeps them in the County?</li> </ol> </li> <li>4. From the results of the “Quality of Life Definition Survey, clearly define “quality of life” for County businesses and residents and articulate specific examples and goals to either maintain or improve areas important to businesses and residents</li> </ol>
<p>b. Develop an environment for public policy-making driven by “quality of life.”</p>	<ol style="list-style-type: none"> <li>1. Use the quality of life issues defined in the Quality of Life Definition Survey as an element of policy-making decisions</li> <li>2. Develop specific responsibilities for individuals to communicate and monitor quality of life issues in policy-making for the County as part of an overall quality of life agenda. For example, ensure that a quality of life partner is present at all policy-making events that have an impact on quality of life issues for County residents and businesses</li> <li>3. As part of the overall communication plan (Strategy 2, Goal a.), ensure that current and relevant quality of life issues are clearly articulated and targeted to policy-makers so they remain key to the County’s agenda</li> </ol>

c. Protect the environmental, natural, cultural, educational and other resource bases of the County.

Support preservation of scenic vistas, farmland, shoreline and other open space assets using a public and private collaborative to set aside lands of special value

1. Complete a County land use plan
2. Implementation Committee agrees to a methodology for setting land use priorities for Countywide land use
3. Implementation Committee recommends a Countywide set of priorities to each municipal legislative body to use in setting local land use priorities

d. Improve the County’s recreational assets.

Support County/municipal planning efforts that encourage public and private maintenance and enhancement of recreational assets for fishing, hunting, hiking, bicycling, water sports, bird and wildlife watching, skiing, golf and other active and passive outdoor activities

1. Using the County land use plan and local priorities, advocate for policies that sustain the County’s long-term economic development vision, while maintaining and enhancing recreational assets
2. Encourage municipalities to adopt zoning and sub-division regulations that include land set-asides and open space set-asides for recreation purposes
3. Identify and disseminate model zoning and sub-division regulations that accomplish this objective

e. Work with regional and state partners and other stakeholders to create a healthy housing mix.

1. Develop a broad consensus in the County in support of affordable work force housing across the price spectrum to define a competitive advantage for the County’s economy. Collaborate with the Ulster County Housing Consortium to:
  - a. Define and articulate a regional housing market that is not influenced by political boundaries
  - b. Update existing housing needs assessments, ensuring the best possible information and data are brought into the forecast of current and future housing needs
  - c. Develop and commit to regularly scheduled housing need estimates, and assist in the assembly of updated data and information from the business community
  - d. Assist these partners with developing credible impact analysis for targeted audiences, such as municipal officials, homebuilders, realtors, and mortgage lenders. Articulate the importance of having an adequate supply of work force housing across the price spectrum
  - e. Assist the Consortium and coordinate with regional partners to prepare and deliver credible estimates of housing need and other important work force housing information via various methods (such as workshops for municipal officials and meetings or focus groups to engage regional employers)
2. Engage the public to increase the County’s awareness regarding the need for and the benefits of affordable work force housing. Do this through a public relations campaign that supports an overall, coordinated communication plan

Note: Stakeholders may include Ulster County Housing Consortium, including the Rural Ulster Preservation Company, and similar organizations

## Strategy 9: Recruit a Diverse Business Base

**Need:** The County needs to recruit strategically a more diverse business base to expand the breadth and depth of the County’s key industries.

**Overarching Goal:** Create a diversified portfolio of businesses in line with our key industries.

**Lead Responsibility:**

- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Chamber of Commerce of Ulster County
- Small Business Development Center
- Hudson Valley Center for Innovation
- Representatives from Economic CCE Stakeholder Group

**Timeline:** 0 to 3 years

GOALS	POTENTIAL ACTION STEPS
<p>a. Develop and implement an asset-based strategic recruitment program.</p>	<ol style="list-style-type: none"> <li>1. Establish a series of specific business recruitment teams—with CEO involvement—organized around the County’s key industries. (Recruitment teams provide oversight for recruitment program, reviewing strategies, actions, and message development as part of an overall communication plan</li> <li>2. Identify functional competitive needs not currently present in the County’s employment base</li> <li>3. Identify the County’s key assets that are of interest to under-represented sectors (draw on information from Business Visitation Program (Strategy 10, Goal c.) and Functional Competitive Attributes Questionnaire (Strategy 10, Goal b.))</li> <li>4. Identify target recruitment companies—including short-term, medium-term, and long-term prospects (this likely involves retaining additional professional assistance to develop this target list of candidate companies)</li> <li>5. Establish outcome-based benchmarks for measuring recruitment team effectiveness</li> <li>6. Devise a marketing and communication approach as part of the County’s overall communication plan</li> <li>7. Dedicate sufficient resources to support recruitment program effort</li> </ol>
<p>b. Create a virtual, affordable “just-in-time” support services delivery system.</p>	<ol style="list-style-type: none"> <li>1. Identify and group services appropriate to key industries (each key industry may require a different set of services and they should compliment existing “Red Carpet” offerings.)</li> <li>2. Identify preferred providers for each service and their costs</li> <li>3. Develop platform for services delivery (e.g. follow Technology Incubator services delivery format)</li> <li>4. Develop a marketing plan for marketing these services</li> </ol>

## Strategy 10: Retain and Expand Existing Businesses

**Need:** Maintain current and attract new businesses and investments by understanding global markets, competitions, and business decision structures that encourage and keep local ownership.

**Overarching Goal:**

Help current Ulster County businesses succeed.

**Lead Responsibility:**

- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Chamber of Commerce of Ulster County
- Small Business Development Center
- Hudson Valley Center for Innovation
- Representatives from Economic CCE Stakeholder Group

**Timeline:** 0 to 3 years

GOALS	POTENTIAL ACTION STEPS
a. Understand what local businesses need to succeed.	<ol style="list-style-type: none"> <li>1. Conduct initial business visits in key industry sectors</li> <li>2. Synthesize results of those initial visits to develop a functional profile of a successful County business for market-prospect segmentation</li> <li>3. Validate results with several focus groups of local businesses and entrepreneurs</li> </ol>
b. Review and understand the County’s key competitive attributes to facilitate expansion.	<ol style="list-style-type: none"> <li>1. Identify responsibility for expansion plan</li> <li>2. Create a Functional Competitive Attributes Questionnaire to use for in-depth interviews with key companies in each of the County’s key sectors to discover the common factors underpinning competitive success across the County</li> <li>3. Using data from interviews, categorize functional competitive needs of the County’s key industries not presently represented in the County employment base</li> <li>4. Identify expansion services opportunities to respond to identified needs</li> <li>5. Develop an in-house capability and/or identify strategic services provider partners to deliver expansion services</li> <li>6. Conduct a periodic review/assessment of expansion services:                     <ul style="list-style-type: none"> <li>▪ Develop new services as required</li> <li>▪ Procure additional supplemental resources, as needed</li> </ul> </li> <li>7. Communicate as part of an overall communication plan services availability and attributes</li> </ol>
c. Provide strategic trouble-shooting services and aggressive advocacy for existing County businesses.	<ol style="list-style-type: none"> <li>1. Create a structured Business Visitation Program headed by a member of the economic development services system in the County</li> <li>2. Establish strong and meaningful communications between economic development services system and key business by:                     <ol style="list-style-type: none"> <li>a. Assembling an appropriately credentialed team (e.g. the correct mix of staff and senior management), to undertake the program on an on-going basis</li> <li>b. Establishment of a living list of company contacts categorized into an “at risk,” “stable,” and “growing/in-expansion” typology</li> <li>c. Development of an information gathering (from the company) and dissemination (to the company) program for year #1</li> </ol> </li> </ol>

d. Provide seamless delivery of key technical support services to the County’s businesses.

- d. Development and implementation of a contact manager system to record all significant information gathered or discussed during business visitations
- e. Allocation of a sufficient level of resources so that all key businesses in the above-referenced inventory are “visited” at least one time per year (twice per year for companies)
- f. Designing a strategy to develop and implement needed policies that advocate for and support County businesses. Constantly evaluate and improve the delivery of support services that the County’s businesses need as they evolve, especially those in key industries

Design a business retention program

- 1. Design and implement retention steps for companies that are experiencing “short-term threats or challenges.” (To be determined (TBD) after first round of the Business Visitation Program (see Strategy 10, Goal c.))
- 2. Design and implement retention steps for companies that are making longer-term structural adaptations (e.g. re-inventing or re-invigorating themselves), as they adapt to their evolving competitive challenges. (TBD after first round of the Business Visitation Program (see Strategy 10, Goal c.))

Develop a program for raising capital to keep business ownership local.

- 1. Refer to Angel Network goal and action steps in Strategy 4, Goal b.
- 2. Identify debt financing alternatives that could be used to augment equity financing options
- 3. Investigate “best practices” approaches for “employee buy-out” strategies
- 4. Develop “packages” or a tool kit of each identified approach

### Strategy 11: Create Labor Force Capability In Line With Business Needs

**Need:** To attract and maintain key industry businesses aligned with current and future development goals.

**Overarching Goal:** Match and improve the education level and depth of skills of the County work force with current and future job prospects.

**Lead Responsibility:**

- Ulster County Work Force Development System
- SUNY New Paltz
- SUNY Ulster
- Ulster County BOCES
- NYS Department of Labor
- Representatives from Human CCE Stakeholder Group

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
<p>a. Work with the County and Hudson Valley public/private educational institutions to improve skills and align with economic drivers.</p>	<ol style="list-style-type: none"> <li>1. Identify educational institutions, public and private</li> <li>2. Identify work force development partners:                             <ul style="list-style-type: none"> <li>▪ Economic development service providers</li> <li>▪ K-12, technical, high education, and adult education stakeholders</li> <li>▪ Key industry representatives</li> <li>▪ New York State Department of Representatives of Labor</li> <li>▪ American Society for Training &amp; Development (ASTD)</li> <li>▪ Others as identified</li> </ul> </li> <li>3. Work with identified work force development partners to create and administer a comprehensive needs assessment of critical skill sets including:                             <ul style="list-style-type: none"> <li>▪ An assessment of basic reading, writing, and technical capabilities needed</li> <li>▪ Advanced, high value-added skills/capabilities needed</li> <li>▪ Non-technical-social skills needed to function as a team</li> </ul> </li> <li>4. Assign responsibility to the regional partner (members of the Ulster County Work Force Development System) to create a Work Force Improvement Plan using the needs assessment data</li> <li>5. A coordinated plan might include the following:                             <ul style="list-style-type: none"> <li>▪ Identify key work force educational gaps from needs assessment data</li> <li>▪ Identify how to communicate with and coordinate with educational institutions to create interesting and creative programs</li> <li>▪ Coordinate with local ASTD members to ensure that corporate trainers are coordinating their programs to support future economic development</li> <li>▪ Coordinate with work force partners to create internships that improve student career awareness, career exploration and indoctrinate students about skills and work ethics needed to succeed in the modern workplace                                     <ul style="list-style-type: none"> <li>○ Learn to earn program for the schools</li> <li>○ Workplace mentoring programs to give students positive workplace experiences</li> </ul> </li> </ul> </li> <li>6. Execute the Work Force Improvement Plan</li> <li>7. Work with New York State Department of Labor and representatives of the County’s key industries to investigate the labor market job matching</li> </ol>

- potential of web based job clearing house for key occupations for key industries in need-demand
- 8. Supply all school classrooms in the County with an adequate number of computers to increase student computer literacy
  - a. Coordinate with County school boards to conduct a needs assessment for each school
  - b. Identify potential funding sources, such as:
    - o Private foundation grants
    - o Community donors
    - o State and Federal education program grants
  - c. Assign responsibility for program and include monitoring and updates as a regular activity to maintain currency of technology

## Targeting Key Sectors

### Strategy 12a: Enhance the Travel and Tourist Industry

**Need:** Strengthen the County’s travel and tourism industries.

**Overarching Goal:** Improve promotion of the County’s tourism sector. Increase the level of collaboration among the County’s tourism businesses and other regional attractions/businesses in the Hudson Valley.

**Lead Responsibility:**

- Ulster County Tourism
- Chamber of Commerce of Ulster County
- Tourism businesses
- Arts and Cultural Organizations
- Cornell Cooperative
- Representatives from Economic and Cultural CCE Stakeholder Groups

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
<p>a. Create an integrated marketing plan to efficiently promote tourism in the County.</p>	<ol style="list-style-type: none"> <li>1. Assign responsibility for overall guidance, monitoring and execution of an integrated tourism marketing plan</li> <li>2. Create a branding strategy for County tourism as part of an overall marketing plan. This strategy could include the following:                             <ul style="list-style-type: none"> <li>▪ County slogan (update if necessary)</li> <li>▪ Differentiating County attributes</li> <li>▪ Positioning related to attributes</li> </ul> </li> <li>3. Design and implement a “Tourism Marketing Survey” to develop a profile of County visitors and their activities. A survey could take several forms: interrupt-type surveys of customers (e.g. overnight night visitors to fill out a survey on their departure), patrons of recreational activities, and an online survey for visitors to the County’s tourism website or County attractions</li> <li>4. Collect the following data:                             <ul style="list-style-type: none"> <li>▪ Demographic characteristics</li> <li>▪ What activities visitors enjoy</li> <li>▪ The length of stay of visitors</li> <li>▪ The level of expenditures of the various parts of visitors’ trips</li> <li>▪ Where visitors to the County live</li> <li>▪ Where visitors stay by type of accommodation (hotels, motels, Bed &amp; Breakfasts, friends, families, second homes, etc.)</li> <li>▪ Other places visitors vacation in addition to the County’s attractions</li> <li>▪ What visitors purchase during their stay in the County</li> </ul> </li> <li>5. Use “Tourism Marketing Survey” data to more efficiently target tourism marketing efforts (tied to marketing plan above)                             <ol style="list-style-type: none"> <li>a. Identify promising age groups and income classes that could be targeted for marketing campaigns</li> <li>b. Complete an assessment of the popularity of the different activities and venues throughout the County</li> <li>c. More clearly define the primary market area of the County’s visitors</li> </ol> </li> <li>6. Create an annual travel and tourism industry conference to facilitate collaboration among County businesses                             <ul style="list-style-type: none"> <li>▪ Plan and hold an annual travel and tourism industry conference for County businesses. Such a conference provides an opportunity to</li> </ul> </li> </ol>

network and share information about industry trends and strategies for improving the performance of the County's industry. Additionally, it could facilitate communication between business owners and operators in this key industry cluster

7. Assess needed funding to support an expanded tourism marketing program
  - Determine gap between current and projected needed funding to accomplish expanded tourism marketing activities
  - Determine tourism priority among other economic development programs
  - Identify potential expanded funding sources, including state matching funds, to meet expanded program requirements
  - Modify overall tourism marketing program based on funds availability

## Strategy 12b: Strengthen & Maintain Economic Viability of Agriculture

**Need:** Keep the environment a healthy, scenic, and productive asset of the County to support a rural working landscape with a critical mass of locally grown food products

**Overarching Goal:** Strengthen and maintain the economic viability of agriculture.

**Lead Responsibility:**

- Cornell Cooperative
- Rondout Valley Growers Association
- Private sector commercial farms
- Ulster County Tourism Office
- Ulster County Preservation Board
- Soil Conservation District
- USA Department of Agriculture
- Representatives from Economic and Natural CCE Stakeholder Groups

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
<p>a. Support efforts by the County’s agricultural entrepreneurs and groups to encourage the development of new forms and revitalization of existing types of production agriculture.</p>	<ol style="list-style-type: none"> <li>1. Encourage the growth and development of local and export retail and wholesale markets</li> <li>2. Encourage the “branding” of Hudson Valley products for export</li> <li>3. Facilitate the creation of farmers markets throughout the County for residents and visitors</li> <li>4. Encourage the development of value-added food manufacturing by nurturing entrepreneurs through the development of a second incubator facility</li> <li>5. Assess the capital access, technical support services, and other business development needs (e.g. marketing) of agriculturally-based entrepreneurs in the County</li> <li>6. Design a strategic “toolkit” of services and programs to assist start-up and small production agricultural businesses by major commodity category</li> </ol> <p>Note: Key stakeholders may include: Rondout Valley Growers Assoc., Cornell Cooperative, 4-H</p>
<p>b. Develop a comprehensive approach agricultural economic development.</p>	<ol style="list-style-type: none"> <li>1. Update and implement the Ulster County Farm Land Protection Plan.</li> <li>2. Participate in regional agricultural development corporation activities.</li> </ol>

## Strategy 12c: Develop Strategic Advantage in “Green” and Renewable Technologies and Products

**Need:** Demand for “green” construction, operating technologies, and practices are burgeoning throughout the U.S. Located in New York’s High-Tech Corridor, Ulster County has an unprecedented opportunity to attract and nurture businesses in this sector.

**Overarching Goal:** Increase local-regional capacity to participate in U.S. commercialization and development of renewable and “green” technologies.

**Lead Responsibility:**

- Ulster County Development Corporation
- Ulster County Industrial Development Agency
- Ulster County Legislature
- Sustainable Hudson Valley
- Small Business Development Center
- NYS Energy Research and Development Authority
- Existing Businesses
- Representatives from all CCE Stakeholder Groups

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
a. Partner to create incentive programs to stimulate and nurture new clean energy businesses in the County.	<ol style="list-style-type: none"> <li>1. Create an incentive program to encourage businesses and entrepreneurs to locate in the first or second incubator</li> <li>2. Develop low interest loan programs to stimulate development of renewable energy businesses</li> <li>3. Develop a public education program to encourage businesses and individuals to take part in clean energy initiatives</li> </ol>
b. Build public capacity to understand the value of careers in renewable energy and clean technology.	<ol style="list-style-type: none"> <li>1. Work with local high schools and colleges on work force development to encourage building job competencies, redesigning majors, and providing internship opportunities in renewable energy</li> <li>2. Work with local employers and entrepreneurs to provide training and work force development opportunities to attract and retain individuals in these fields</li> </ol>
c. Identify and provide assistance to existing green building services (such as: architects, engineers, heating contractors, builders, and retail) in the County to expand and diversify by promoting green construction.	<ol style="list-style-type: none"> <li>1. Provide assistance with financing services to growing businesses in this sector that have potential to increase markets beyond the County</li> <li>2. Work with the regional Small Business Development Center (SBDC) and other Red Carpet services providers to provide advisory services to growing businesses in this sector that have potential to increase markets beyond the County</li> <li>3. Provide a list of marketing and public relations resources to owners of green building services to help them develop business specific marketing and advertising plans</li> </ol>
d. Identify and provide assistance to existing manufacturers of green products within Ulster County.	<ol style="list-style-type: none"> <li>1. Provide assistance with financing services to existing businesses in this sector that have the potential to increase markets beyond the County</li> <li>2. Work with the regional SBDC and other Red Carpet services providers to provide advisory services to existing businesses in this sector that have the potential to increase markets beyond the County</li> </ol>

### Strategy 12d: Nurture a Creative Economy

**Need:** Cultural and community development inspires and attracts creative business enterprises – highly desirable enterprises which can locate anywhere.

**Overarching Goal:** Cultivate and promote a thriving arts and creative export sector.

**Lead Responsibility:**

- Chamber of Commerce of Ulster County
- Arts and Cultural Organizations
- Representatives from Cultural CCE Stakeholder Group

**Timeline:** 0 to 5 years

GOALS	POTENTIAL ACTION STEPS
a. Quantify the financial impact of the County’s current creative economy.	<ol style="list-style-type: none"> <li>1. Define and enumerate the principal components of the County’s existing creative economy</li> <li>2. Calculate the historic financial impact of the County’s current creative economy from existing research</li> <li>3. Develop a tracking and reporting mechanism to direct future decision making regarding a creative economy</li> </ol>
b. Develop a partnership between travel/tourism and creative businesses to expand the market for the County’s creative goods and services.	<ol style="list-style-type: none"> <li>1. Develop a public relations campaign directed at the travel/tourism industry to market cultural activities, creative products, and services produced locally</li> <li>2. Encourage local artists and designers to market their goods and services to the region’s travel/tourism industry</li> </ol>
c. Provide technical support to emerging as well as established culturally based businesses.	<ol style="list-style-type: none"> <li>1. Explore the efficacy (with existing participants) of establishing a Creative Enterprise Zone within the City of Kingston (e.g. include incubator space from existing under-occupied buildings) with a range of incentives that would assist fledgling entrepreneurs</li> <li>2. Examine the opportunity to establish a “community foundation” to obtain and manage funds and provide technical assistance to industry participants (similar to the one in neighboring Dutchess County)</li> </ol>

## Appendix A: Identifying Ulster County's Key Industries

This appendix provides a full description of the various analytical processes used and the conclusions reached in identifying Ulster County's key industries. A high-level listing of candidate key industry and industry clusters is also provided.

The first section of the study outlines the importance of base industries, and identifies representative base industries for Ulster County. The method for determining base industries—and therefore could qualify as a key industry for strategic economic development—is known as *Location Quotient Analysis*.

The second section defines industries that have shown the most future promise using filters of positive wage growth, employment growth, and productivity growth. Examining trends in these variables provides insight into which sectors drive either positive or negative influence on Ulster County's relative economic performance.

The third section outlines the methodology for grouping leading and potentially emerging sectors into clusters and examines how sectors are linked to each other. Grouping sectors and leading firms in each industry sector or cluster by common characteristics allows one to examine key competitive and capacity building factors for each group. It also narrows consideration for economic development policy options to support actual and potential economic drivers. Examination of group relationships creates a more meaningful understanding of economic linkages that exist between the key industries and other sectors of the economy, and between each other. A deeper understanding of linkages leads to economic development strategies and action plans that reinforce the strength of competitive underpinnings for Ulster County's economy.

### The Importance of Base Industries

Base industries are those that contribute more to Ulster County's economy through higher employment relative to the nation or the region. They are the industries in which the local economy specializes. Location Quotient Analysis is the methodology used to identify a regional economy's base industries. The formula for calculating Location Quotients is shown below:

$$LQ = (E_i/E_c) \text{ divided by } (E_{ni}/E_{nt})$$

Where:

$E_i$  = Employment in the County's industry

$E_c$  = Total employment in the County

$E_{ni}$  = National employment in the industry

$E_{nt}$  = Total national employment

A location quotient equal to 1.0 means the share of employment in the regional industry is exactly the same as the share of employment in that industry nationally. If the location quotient is greater than 1.0, the share of employment in the regional economy (e.g. Ulster County) exceeds the national share of employment in that industry. Conversely, a location quotient of less than 1.0, means the region's share of employment in the industry is less than that in its national counterpart.

Analytically, industries-clusters with a location quotient greater than 1.0 indicate a relatively high production of goods and services. It is, therefore, likely that some portion of employment

in that sector is tied to production that is exported outside of Ulster County's economy. That portion of the production activity is then properly characterized as supporting the expansion of Ulster County's economic pie. Alternatively, industries with a location quotient of less than 1.0, are most often viewed as being primarily local-serving or non-basic industries. For economic development policy purposes, policy focus is typically on the extremes—sectors-clusters with a location quotient greater than 1.25 (likely export industries) and less than 0.90 (which tend to offer opportunities for import substitution). Table A- 1, below, shows sectors-clusters with a location quotient greater than 1.25.

Location Quotient Analysis is especially valuable because it isolates industries that may not have the highest employment levels but are specialized enough that they stand out on a relative scale, even when compared to larger industries. Ulster County's base industries are shown based on Location Quotients relative to the U.S. economy as the reference region.

<b>Ulster County vs. U.S. Economy</b>				
<b>NAICSLABEL</b>	<b>Title by the Private Ownership</b>	<b>1990</b>	<b>2001</b>	<b>2005</b>
111	Crop production	2.42	2.76	2.97
212	Mining, except oil and gas			1.59
314	Textile product mills	1.36	1.28	1.57
323	Printing and related support activities	1.56	2.04	1.58
332	Fabricated metal product manufacturing		1.26	
333	Machinery manufacturing		1.34	1.36
339	Miscellaneous manufacturing	1.34	1.99	1.39
441	Motor vehicle and parts dealers		1.26	1.25
443	Electronics and appliance stores		1.42	
444	Building material and garden supply stores		1.42	1.39
445	Food and beverage stores	1.56	1.75	1.84
446	Health and personal care stores	1.28	1.59	1.42
447	Gasoline stations		1.27	1.64
452	General merchandise stores		1.42	
454	Nonstore retailers	2.23	2.47	2.96
485	Transit and ground passenger transportation	4.39	5.46	4.81
518	ISPs, search portals, and data processing			5.38
519	Other information services	4.15	6.05	5.89
523	Securities, commodity contracts, investments	6.44		
621	Ambulatory health care services		1.38	1.35
623	Nursing and residential care facilities	1.28	1.86	1.65
721	Accommodation	2.38	2.71	2.51
813	Membership associations and organizations		1.31	1.66
999	Unclassified			2.21

Prepared By: Economic & Policy Resources, Inc.

**Table A- 1. Historical location quotients**

The highest location quotients for Ulster County are found in NAICS<sup>18</sup> codes 518 and 519, indicating that the County has a high concentration of information storage, data processing,

<sup>18</sup> NAICS refers to the North American Industry Classification System. The NAICS system is a typology of industry sectors against which all federal and cooperative state government production, jobs, and wage-personal income estimates are categorized.

internet service providers (ISP), and internet search services. This is not surprising given the region's history. Companies in these industries may form an industry cluster because ISPs and internet search industries are linked from a technology standpoint and search engines are linked to electronic information archives. Machinery Manufacturing and Fabricated Metal Manufacturing may also be linked to one another because machinery manufacturers often use intermediate products of fabricated metal manufactures as parts in their final products. The Machinery Manufacturing sector may even use some of the Fabricated Metal Manufacturing industry's final products. The concept and designation of related industries or clusters, even though they may cross between NAICS categories, are explained further in subsequent sections.

The next table (A- 2) examines industries at the four-digit NAICS level for two reasons. First, 4-digit codes provide a greater level of precision in product or service production activity due to higher degree of specificity in the industry production-activity descriptions. Second, 4-digit codes expose base industries that may be part of a 3-digit NAICS code industry that is not considered a base industry due to lower concentrations of employment in other sectors making up the higher order code. The table also focuses on high value added industries that export finished products out of Ulster County and New York State.

As an example of greater definition, Table A- 2 shows that the Forging and Stamping Industry is a very important component of the broader Fabricated Metal Product Manufacturing Industry in Ulster County. It also gives definition to the Miscellaneous Manufacturing Sector by showing that its production activity and resulting employment levels in the Medical Equipment and Supplies Manufacturing (NAICS code 3391, the industry category within NAICS sector 339) are responsible for its base industry categorization. Table A- 2 also shows that Cement and Concrete Product Manufacturing (NAICS code 3273) qualifies as a base industry base on its location quotient although the broader NAICS 327 does not have a high enough location quotient to be considered a base industry.

### **Understanding the Components of Change in Employment by Major Sector**

While examining employment trends is an excellent way to assess a region's economic health, it is often not sufficient to identify and understand a region's industries or clusters of strategic economic development importance. To get this deeper look and understand why an area's employment is changing and which sectors may be strategically key to Ulster County's economic development needs, this assessment turns to a method known as *Shift-Share Analysis*. The purpose of shift-share analysis is to dissect changes in employment to local, regional, and national industry-wide effects. Once shift-share analysis is completed, the degree to which a county industry's employment has changed can be determined based on external factors: developments in the national economy, developments in the county industry's national counterpart industry and industry mix. One can also examine to what degree local factors affected changes.

Shift-share analysis contains three components: national share, industry mix, and local factors. National share shows what industry employment would have been had employment in the industry grown at the same rate as the economy as a whole. Industry mix shows how employment trends in the industry compare nationally to overall employment in the economy. The local factor portion shows the difference between industry employment nationally and industry employment locally. The local factor is generally the portion of shift share analysis upon which regional-local economic development policy and strategies are focused (see Table A- 2).

The most basic interpretation of shift share analysis is the idea that it uncovers an area's competitive advantage in specific industries. When the local factor outweighs the industry mix factor by a significant amount, this may indicate companies that comprise the industry in Ulster County have an advantage over their competition. This advantage may lay in higher productivity or a specialized product for a number of reasons. These reasons are ripe for analysis and policymaking. In short, it is best to use shift-share analysis to isolate those industries that are either growing or declining due to local factors, and investigate those factors further using other methods and analysis.

***Ulster County vs. Non-New York City New York***

<b>NAICSLABEL</b>	<b>Title by the Private Ownership</b>	<b>1990</b>	<b>2001</b>	<b>2005</b>
3113	Sugar and Confectionery Product Manufacturing		0.94	2.56
3118	Bakeries and Tortilla Manufacturing	1.22	1.06	1.67
314	Textile product mills	1.36	1.28	1.57
323	Printing and related support activities	1.56	2.04	1.58
3231	Printing and Related Support Activities	1.50	1.87	1.45
3273	Cement and Concrete Product Manufacturing	1.41	1.32	1.30
332	Fabricated metal product manufacturing		1.26	
3321	Forging and Stamping		1.24	1.32
333	Machinery manufacturing		1.34	1.36
3339	Other General Purpose Machinery Manufacturing		1.35	1.45
3391	Medical Equipment and Supplies Manufacturing	1.70	1.50	1.29
339	Miscellaneous manufacturing	1.34	1.99	1.39
3399	Other Miscellaneous Manufacturing	0.97	2.07	1.26
485	Transit and ground passenger transportation	4.39	5.46	4.81
4853	Taxi and Limousine Service	1.14	2.19	1.62
4854	School and Employee Bus Transportation	7.04	8.49	8.19
4859	Other Transit and Ground Passenger Transportation			2.21
4931	Warehousing and Storage			7.87
518	ISPs, search portals, and data processing			5.38
519	Other information services	4.15	6.05	5.89
523	Securities, commodity contracts, investments	6.44		
623	Nursing and residential care facilities	1.28	1.86	1.65
721	Accommodation	2.38	2.71	2.51
813	Membership associations and organizations		1.31	1.66

**Prepared By: Economic & Policy Resources, Inc.**

**Table A- 2. 3- and 4-digit NAICS Codes – Candidate Key Industries**

For the purposes of this analysis, we will focus on industries with high location quotients identified in the previous section, and sectors that have shown significant employment gains. The wood product manufacturing sector is a good example, since employment in this sector has increased by almost 40% over the last 15 years. Shift share analysis indicates that job growth in this sector has been buoyed by local factors—evidenced by the negative industry mix portion of the shift share analysis being more than offset by local factors. This sector does not have a high location quotient relative to the nation, but still comprises a more significant portion of Ulster County's share of the wood product manufacturing sector's share of upstate New York. In fact, this may be evidence that this is a newer, still emerging industry in Ulster County.

The Machinery Manufacturing industry has relatively high importance to Ulster County, but has declining employment overall. The driving factor in this sector under shift share analysis is national industry mix—which is significantly negative throughout the period. The local factor was actually slightly positive between 1990 and 2001, and much less negative during the other segments of the 1991-2005 overall time period. This shows that Ulster County probably has a comparative advantage or productivity advantage, but it is not enough to outweigh the influence of the overall industry's national employment decline.

The Fabricated Metal Manufacturing Product Manufacturing industry also had a relatively high level of importance to Ulster County in 2001, but experienced a decline in employment overall over the last 15 years. However, this does not appear to be the entire story. At the 4-digit NAICS level, the data shows that certain components of the sector are experiencing employment declines, while others are actually showing employment gains. NAICS 3327, Machine Shops, Turned Product; and Screw, Nut and Bolt Manufacturing have experienced a decline in employment throughout each period of the last 15 years. The bright spot in the Fabricated Metal Manufacturing sector is the Architectural Metals Manufacturing sub sector. According to the data, the industry has seen a large, positive gain in employment over the last 5 years due to local factors. This is indicative of a possible growth industry with comparative advantage in Ulster County.

Location quotient and shift share analyses show that the Electrical Equipment and Appliance Manufacturing sector is not a base industry in Ulster County. Over the 15-year period, it has shown substantial gains in employment even while the industry mix has shown a large decline. The past 4 years have seen employment in the industry begin to lose ground relative to its U.S. industry counterpart, but the local factor has continued to be strong. This is a high value-added industry that potentially employs skilled workers. This makes it valuable to Ulster County now, and potentially in the future. These data indicate that there should be a strong retention effort to aid companies involved in this industry to maintain and potentially enhance any current competitive advantage.

The Transportation and Equipment Manufacturing Sector has seen large gains in employment since 1990 while the industry mix component has been negative. This industry is not considered a base industry, but shift-share analysis indicates that local factors are hampering the industry. This industry may have connections to the Fabricated Metal Manufacturing industry, giving it added importance as a driver of growth in Ulster County.

The Publishing industry is one sector that has shown significant gains in employment, even for an industry that shift-share analysis indicates is experiencing difficulties (evidenced by its negative industry mix factor). This sector has experienced a 73.0% increase in employment since 1990. This has slowed over the past 4 years as local factors continue to outweigh double-digit declines in this sector's industry mix factor.

The ISP, Search Portal, and Data Processing sector has experienced a 127.8% increase in the past 4 years, while the industry mix has shown a 28.6% decrease. This shows a very strong competitive advantage in an industry that employs highly skilled individuals. The decline in industry mix is most likely a result of the so-called "dot.com bust," a phenomenon that Ulster County businesses appear to have been able to avoid.

Ulster County has seen strong growth in certain portions of its high value-added services sectors. While most service sectors are not export-oriented industries, there are some service sectors that are made up of companies supplying highly specialized services that are exported out of the

county, region, state, or nation. One of these is the sector known as Management of Companies and Enterprises. This sector provides services to companies such as holding companies securities, research and development services, trucking, warehousing, and data processing. This industry has seen strong growth in both its local and industry mix factors. The industry also is closely related to ISP, Search Portal, Data Processing, and Scientific Research and Development sectors; a relationship which may form an industry cluster.

### **Preliminary Industry Cluster Analysis—The 6000-Foot View**

A region's economy, like Ulster County's economy, is typically comprised of numerous participants interacting with each other as buyers and sellers of goods and services—the outputs of some are the inputs to others. Industry A supplies goods to Industry B, which, in turn, supplies its goods to Industry C, where they are made into products that are sold to ultimate users of those products—termed final demand. At each leg of the production cycle, value is added until the product (or service) is ready for use in final demand. Productivity of capital and labor and economic linkages within the region determine the economic “reach” of each industry participant in the region's economy. Goods and services produced within the region and sold to final demand outside the region result in dollars flowing into the region's economy. Once in the region's economy, these dollars are circulated through subsequent business transactions as wage earnings, rents, and purchases of good and services so that the total dollar impact is greater than the sum of the parts. This circulation of dollars through the economy is referred to as the *multiplier effect or the economic ripple effect*.

Why are some industries more significant than others, and why is it important to know the difference? Industries engaged primarily in serving final demand outside the region are termed by participants in economic development and economists as “base industries.” Base industries were identified in the previous section by calculating location quotients. Base (or basic) industries that play a significant role in the region's economy as measured by relative employment levels and wages are referred to as “key industries or clusters.” A region's economic strength and prospects are determined by its key industries because these industries are responsible for attracting the economic resources that improve the quality of life and well-being of the region's citizens through increased personal income and the provision of replacement and new public resources. As mentioned previously, a region's key industries are those base industries with significant employment levels and concentration. They typically exhibit high multiplier effects. Key industry sectors or clusters may be located in the region by historic factors, proximity to production requirements (such as natural resources) or to markets by transportation corridors, or other competitive advantage that favors the industry's development in the region relative to elsewhere.

Understanding the competitive circumstances of Ulster County's key industries or clusters facilitates greater understanding of what makes the region's economy function. With this knowledge, resources and efforts of the region can be directed to achieve the highest valued return to Ulster County's citizens, making the greatest relative contribution to overall quality of life.

### **Method for Identifying Key Regional Industries-Clusters**

The first steps in identifying key regional industries-clusters were completion of the location quotient and shift-share analysis, revealing several sectors that appeared to be key regional

industries. While an industry can be important to the county due to its size (e.g. the number of employees), those industries considered “base” industries are the ones that *import* dollars into the region and *drive* the county’s economy. Base industries-clusters attract economic resources into Ulster County, improving the quality of life and well-being of the region’s citizens through increased personal income and the provision of replacement and new public resources. Therefore; the next step in analysis of Ulster County’s key sectors-clusters focuses on those that are “base” or dollar-importing industries.

The method for refining and further identifying the industry clusters is analysis of *IMPLAN* data. *IMPLAN* was originally developed by the United States Department of Agriculture and Federal Emergency Management Agency to assist the U.S. Department of the Interior Bureau of Land Management in management and planning of land resources. Since then, the Minnesota *IMPLAN* Group has transformed the program from a mainframe, non-interactive application to a menu-driven microcomputer program that assists economists in impact studies using social accounts and input/output multipliers. For this study, *IMPLAN* serves as an excellent data source to isolate linkages outlined above. It is *IMPLAN*’s multipliers that will help further identify and study the relationships between Ulster County’s industry clusters.

The first step in identifying important clusters is to determine which industries create the most output, and of that output, how much value is added in Ulster County. This is an important step because it shows the raw size of the industry and its value added output. The amount of value an industry adds to a product is a good proxy for what an industry may mean for the local economy. An industry may have large output, but if it is just reselling goods without much value added, the local economy will not benefit much. Table A- 3 on the following page shows the output of the largest export industries in Ulster County and how much value is being added by those industries.

Ulster County’s largest value added industry is Monetary Authorities and Depository Credit Intermediary Services. This sector is not the largest in terms of output, but adds the most value to services it produces. The value this sector adds is not tangible in the form of goods. Instead, most of the value added in this sector is intellectually based. As part of the Management of Companies and Enterprises sector mentioned above, it is closely related to the Information Services sector and the ISP, Search Portal, and Data Processing Sector. Other more specialized industries related to this industry also have high value added output, such as the Securities, Commodity Contract and Investment Services sector, Management and Consulting Services sector; and Database, Directory, Non-Depository Credit Intermediation and Related Services, Custom Computer Programming Services, and Other Publishers Sector.

The data indicates that the largest goods-producing industry in Ulster County is the Aluminum and Extruded Product Manufacturing sector with estimated output of \$177 million. This industry is heavily dependant on economies of scale and outside suppliers of materials. The reason a lower percentage of this sector’s output is considered value-added, is because it must depend on outside suppliers for much of its inputs. Having this industry within its borders may provide a competitive advantage to other producers who use this sector’s products. Sectors with high value-added output that may benefit from this include the Cutlery and Flatware, Except Precious, Manufacturers; Industrial and Fan Blower Manufacturers; Lighting Fixture Manufacturers; All Other Industrial Machinery Manufacturing; and All Other Forging and Stamping sectors (see Table A- 3).

<b>Industry</b>	<b>Industry Output</b>	<b>Total Value Added</b>
<b>Totals</b>	<b>6461.553</b>	<b>3915.908</b>
Monetary authorities and depository credit institutions	174.385	122.731
Offices of physicians, dentists, and other healthcare services	153.560	118.829
Real estate	130.678	89.872
Nursing and residential care facilities	107.616	78.331
Power generation and supply	108.579	78.047
Hospitals	156.976	73.624
Telecommunications	119.783	67.909
Insurance agencies, brokerages, and related services	59.909	56.355
Other ambulatory health care services	135.440	54.456
Aluminum extruded product manufacturing	177.283	53.297
Cutlery and flatware, except precious, manufacturing	59.509	34.650
Business support services	53.743	33.522
Office administrative services	74.363	31.078
Data processing services	165.537	30.453
Explosives manufacturing	61.928	26.946
Commercial printing	36.424	26.451
Nondepository credit intermediation and related services	31.451	25.534
Industrial and commercial fan and blower manufacturing	58.975	24.592
Custom computer programming services	28.622	23.115
Accounting and bookkeeping services	36.001	19.570
Insurance carriers	50.134	18.281
Power-driven handtool manufacturing	47.513	14.684
Architectural and engineering services	22.852	13.670
Truck transportation	30.954	13.660
Plastics bottle manufacturing	33.499	13.394
Securities, commodity contracts, investments	20.470	13.143
Scientific research and development services	26.987	12.810
Lighting fixture manufacturing	28.278	11.521
Newspaper publishers	21.563	10.873
Laboratory apparatus and furniture manufacturing	26.875	10.719
Warehousing and storage	13.582	10.172
Management of companies and enterprises	18.594	9.590
Other support services	18.109	9.079
Cut and sew apparel manufacturing	17.608	8.569
Bread and bakery product, except frozen, manufacturing	22.625	7.976
Management consulting services	12.532	7.622
Performing arts companies	11.305	7.488
Nonupholstered wood household furniture manufacturing	19.873	7.344
Buttons, pins, and all other miscellaneous manufacturing	16.004	7.228
Advertising and related services	12.676	7.206
Travel arrangement and reservation services	18.998	7.000
Prefabricated wood building manufacturing	19.195	6.809
All other industrial machinery manufacturing	16.689	6.555
Other computer related services, including facilities	9.843	5.750
Information services	29.796	5.699
All other miscellaneous professional and technical	10.772	5.644
Ready-mix concrete manufacturing	16.237	5.268
Radio and television broadcasting	14.822	5.099
Fluid power pump and motor manufacturing	14.206	5.057
Machine shops	10.655	5.029
Grantmaking and giving and social advocacy organizations	12.721	4.797
Other concrete product manufacturing	11.206	4.573
Database, directory, and other publishers	11.836	4.531
Motion picture and video industries	15.843	4.459
Semiconductors and related device manufacturing	28.348	4.413
Scenic and sightseeing transportation and support	5.148	4.361
Sound recording industries	6.047	4.073
Pharmaceutical and medicine manufacturing	15.597	4.013
Electric power and specialty transformer manufacturing	9.482	3.683
Book publishers	10.190	3.479
Lessors of nonfinancial intangible assets	5.479	3.467
Other millwork, including flooring	10.309	3.395
All other forging and stamping	8.924	3.378
Audio and video equipment manufacturing	14.226	3.247
Curtain and linen mills	10.524	3.001
All other electronic component manufacturing	18.565	2.921

Table A- 3. Total value-added by industry - Ulster County

The next step in identifying clusters is to identify the largest export industry sectors in Ulster County's economic base. As mentioned before, export industries increase the wealth of the County by adding value to commodities that can be exported in return for wealth. It is not surprising that the largest export industries are also the largest overall producers. The aluminum industry is the largest industry in terms of output and exports for goods (see Table A- 4). Aluminum production is only efficient, and therefore competitive, if done on a very large scale. A single County could never consume all of the aluminum produced at an aluminum production facility. As a consequence, most of the aluminum produced in Ulster County intuitively should (and the data says in actuality) be exported. Economies of scale and proximity to inputs create the County's competitive advantage in this industry.

*Competitive advantage* is what drives export industry. It is the reason that trade between regions occurs. Without competitive advantage, there would be no reason to pay transportation costs to move goods between localities. In most cases, it is not as easy as it was in the case of the aluminum industry to determine what gives an industry its competitive advantage. The most common competitive advantage arises from proximity to natural resources. This, or quality rail infrastructure, appears to be why the Aluminum Manufacturing industry located in Ulster County.

Competitive advantage may also arise from entrepreneurial expertise. This is very hard to quantify, but has become the main source of most competitive advantage. Isolating industries that have created their own competitive advantage through invention of a process or product has already been done in this study to great extent. Information, data processing services, and monetary and credit services sectors are a product of this type of entrepreneurial competitive advantage, because they trade in intellectual capital. These types of industry could locate anywhere there is a quality workforce, but the reason they have located in Ulster County should be examined further.

Locating in clusters is an advantage for intellectual good producers (information, data processing services, and monetary and credit services sectors) and tangible goods producers alike, but for different reasons. Advances in communication have made transferring intellectual capital easier and have allowed businesses more freedom to choose locations outside of traditional market centers. That said, these businesses must still have access to infrastructure, such as fiber optic communication lines and professional services needed to support them.

Industries that produce tangible goods benefit from clusters in different ways. They benefit just as the industries that provide services from infrastructure but they also benefit from being located in close proximity to their suppliers. The next step in this analysis is to isolate those industries that support others within Ulster County by purchasing locally produced commodities. This is done by analyzing regional purchase coefficients (RPCs) by industry sector. RPC's are estimated fractions of regional or local demand that is locally-supplied, versus that portion of demand that is served by suppliers located outside Ulster County (see Table A- 5).

Table A- 5 displays the industries that buy the largest percentage of their inputs from inside Ulster County. These industries can be separated into three broad categories, (1) manufacturers who buy tangible inputs from local sources and combine them with workers with a broad range of skill levels; (2) services whose inputs outside of basic fixed-costs consist of labor; and (3) industries that combine high levels of human capital with machinery and equipment. Each one of these industry types appears to be important to Ulster County as a whole, because they provide workers with a broad spectrum of opportunities.

<b>Commodity</b>	<b>Foreign Exports</b>	<b>Domestic Exports</b>	<b>Total Exports</b>
Aluminum sheet- plate manufacturing	0.000	163.249	163.249
Data processing services	0.753	152.727	153.480
Other ambulatory healthcare services	0.000	79.675	79.675
Nonstore retailers	0.000	78.033	78.033
Other accommodations	0.000	62.248	62.248
Explosives manufacturing	19.007	40.701	59.708
Industrial and commercial fan blower manufacturing	10.207	44.317	54.524
Cutlery and flatware manufacturing	9.391	44.600	53.991
Office administrative services	0.000	51.666	51.666
Monetary authorities	8.479	40.190	48.669
Transit and ground passenger transportation	0.000	46.462	46.462
Hotels and motels- including casino hotels	0.000	45.335	45.335
Nursing and resident care facilities	0.000	45.131	45.131
Insurance agencies, brokerages and related	0.000	44.562	44.562
Food and beverage stores	0.000	37.748	37.749
Business support services	0.098	37.530	37.628
Religious organizations	0.000	30.835	30.835
Plastics bottle manufacturing	1.350	28.280	29.630
Lighting fixture manufacturing	2.060	26.341	28.401
Information services	0.018	28.237	28.255
Automotive repair and maintenance, except car washes	0.004	23.520	23.524
Soft drink and ice manufacturing	0.150	22.925	23.074
Used and secondhand goods	3.899	16.970	20.868
Fluid milk manufacturing	0.086	19.775	19.860
Telecommunications	1.492	18.252	19.744
Commercial printing	0.964	18.176	19.140
Fruit and vegetable canning and drying	1.240	17.591	18.832
Prefabricated wood building manufacturing	0.219	18.408	18.627
Social assistance- except child day care services	0.000	17.447	17.447
Motor vehicle and parts dealers	0.000	17.210	17.210
Buttons- pins- and all other miscellaneous manufacturing	3.797	11.607	15.404
Ready-mix concrete manufacturing	0.001	15.328	15.329
Wholesale trade	14.883	0.000	14.883
Power-driven handtool manufacturing	6.798	8.002	14.800
Drycleaning and laundry services	0.000	14.190	14.190
Elementary and secondary schools	0.000	13.322	13.322
Food services and drinking places	0.193	12.936	13.129
Maintenance and repair of non residential buildings	0.049	12.744	12.794
Nonupholstered wood household furniture manufacturing	2.061	10.426	12.486
Travel arrangement and reservation services	0.618	11.751	12.370
Stone mining and quarrying	0.174	12.171	12.345
Fluid power pump and motor manufacturing	2.182	9.829	12.011
Scientific research	0.263	11.182	11.445
Gasoline stations	0.000	11.420	11.420
Other concrete product manufacturing	0.127	10.694	10.821
Curtain and linen mills	0.467	9.199	9.666
All other electronic component manufacturing	7.768	1.600	9.368
Sporting goods- hobby, book and music stores	0.000	9.364	9.364
Logging	0.898	8.422	9.320
Fruit farming	2.268	7.028	9.295
Fats and oils refining	0.683	8.275	8.958
Confectionery manufacturing	0.000	8.695	8.695
Book publishers	0.838	7.653	8.491
All other forging and stamping	0.642	7.674	8.316
Semiconductors and related device manufacturing	7.073	0.298	7.371
Building material and garden supply stores	0.000	7.334	7.334
Doll- toy- and game manufacturers	1.051	6.100	7.151
Paperboard container manufacturers	0.319	6.806	7.125
Scrap	4.322	2.633	6.955
Bread and bakery products, except frozen manufacturers	0.206	6.435	6.640
Database- directory- and other publishers	0.131	6.465	6.597
Performing arts companies	0.055	6.530	6.585
Home health care services	0.000	6.507	6.507
Other millwork- including flooring	0.307	6.003	6.311
Audio and video equipment manufacturers	2.749	3.370	6.119
Dry- condensed- and evaporated dairy products	1.190	4.877	6.067
Ship building and repairing	0.124	5.659	5.783
Couriers and messengers	0.000	5.710	5.710
Sheet metal work manufacturing	0.021	5.639	5.660
Newspaper publishers	0.008	5.416	5.424
Miscellaneous store retailers	0.000	5.275	5.275
Health and personal stores	0.000	5.185	5.185
Postal service	0.096	5.013	5.109
Machine shops	0.000	5.109	5.109
All other industrial machinery manufacturing	4.540	0.554	5.094
Other support services	0.016	5.075	5.090

Table A- 4. Industry exports

<b>Industry</b>	<b>Average RPC</b>
Laboratory apparatus and furniture manufacturing	0.98
Plastics bottle manufacturing	0.96
Bread and bakery product- except frozen- manufacturing	0.92
Warehousing and storage	0.90
Accounting and bookkeeping services	0.90
Performing arts companies	0.85
Power generation and supply	0.85
Petroleum lubricating oil and grease manufacturing	0.84
Sound recording industries	0.84
Explosives manufacturing	0.83
Hospitals	0.82
Rolling mill and other metalworking machinery	0.82
Dental laboratories	0.80
Scientific research and development services	0.80
Office administrative services	0.80
Business support services	0.80
Other support services	0.80
Other millwork- including flooring	0.80
Semiconductors and related device manufacturing	0.80
Museums- historical sites- zoos- and parks	0.80
Custom computer programming services	0.77
Advertising and related services	0.76
Semiconductor machinery manufacturing	0.75
Machine shops	0.75
Offices of physicians- dentists- and other health services	0.71
Other computer related services- including facilities	0.71
All other industrial machinery manufacturing	0.70
Monetary authorities and depository credit intermediation	0.70
Scenic and sightseeing transportation and support	0.70
Insurance agencies- brokerages- and related services	0.67
Metal cutting machine tool manufacturing	0.66
All other electronic component manufacturing	0.65
Industrial process variable instruments	0.65
Engineered wood member and truss manufacturing	0.65
Electric power and specialty transformer manufacturing	0.63
General and consumer goods rental except video tape	0.63
Sawmills	0.62
Custom architectural woodwork and millwork	0.62
Power-driven handtool manufacturing	0.62
Telecommunications	0.57
Institutional furniture manufacturing	0.54
Watch- clock- and other measuring and controlling devices	0.53
Nonupholstered wood household furniture manufacturing	0.51
Architectural and engineering services	0.51
Specialized design services	0.51
Optical instrument and lens manufacturing	0.48
Metal forming machine tool manufacturing	0.48
Sawmill and woodworking machinery	0.48
Nondepository credit intermediation and related activities	0.47
Surgical appliance and supplies manufacturing	0.42
Audio and video equipment manufacturing	0.42
Electromedical apparatus manufacturing	0.41
Electronic equipment repair and maintenance	0.40
Wood office furniture manufacturing	0.40
Cutlery and flatware- except precious- manufacturing	0.38
Cut stock- resawing lumber- and planing	0.38
Commercial printing	0.38
Data processing services	0.37
Analytical laboratory instrument manufacturing	0.37
All other miscellaneous professional and technical	0.37
Management consulting services	0.36
Miscellaneous wood product manufacturing	0.30
Securities- commodity contracts- investments	0.29
Lessors of nonfinancial intangible assets	0.27
Electroplating- anodizing- and coloring metal	0.27
Other household and institutional furniture	0.27
Cut and sew apparel manufacturing	0.27
Other basic inorganic chemical manufacturing	0.25

Table A- 5. Regional Purchase Coefficients of export industries

The export industry that purchases the highest portion of its inputs from local sources is the Laboratory Apparatus and Furniture Manufacturing industry. This industry is not very prominent in Ulster County in terms of total output and employment, and consequently is not a large exporter. Its importance lies in the demand it creates for other industries in Ulster County and the opportunities it creates for workers both in the industry itself, and in the industries that supply its inputs. The industry with the second highest regional purchase coefficient is the plastic bottle manufacturing industry. This industry may comprise part of an industry cluster. There are other plastic producers in the area from which it purchases inputs, and with which it can share knowledge and training initiatives.

High-skill service industries account for a significant portion of the high RPC industries. The main input into these industries is human capital, which is purchased from skilled employees in industries such as Accounting and Bookkeeping Services; Office Administration Services; Monetary Authorities and Depository Credit Intermediaries; and Architectural, Data Processing Services, Custom Computer Programming Services, and Engineering Services industries. Other inputs for these industries consist of office equipment vendors, such as computers (which are not produced locally in Ulster County), and commercial space (which are purchased within the County).

The third category of Ulster County's industry consists of those that combine a significant amount of local content in their inputs with high levels of human capital. Prime examples of this are Scientific Research and Development Services and Dental Laboratories. These industries use very specialized equipment to conduct research and perform laboratory services. They combine high tech instruments with highly skilled workers to create this sector's output. This category of industry is very important to Ulster County, because it pays highly skilled people high wages and purchases some of Ulster County's high value added goods.

The final step in this analysis (at the 6,000-foot level) is to identify which industries form clusters in Ulster County and identify which may have the potential to do so. A listing of candidate clusters-industries (Table A- 6) is presented on the following pages. These sectors will be investigated more fully over the next 1-3 years, while Ulster County stakeholders and partners continue this economic development planning effort to get a greater degree of resolution regarding what these sectors require for their further development. This effort will enable strategic economic development implementers to understand more of the details and inter-connections of these candidate key industries and industry clusters in order to help them develop further and succeed economically.

### 1) Scientific Apparatus and Research Cluster

-Companies in this cluster manufacture equipment, furniture and appliances for laboratories and research facilities. Companies in this cluster also utilize these products.

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
33911	Laboratory apparatus and furniture manufacturing	1.29
33911	Surgical appliance and supplies manufacturing	1.29
5417	Scientific research and development services	0.79
33911	Dental laboratories	1.29
<b>Cluster Employment (estimated)</b>		<b>396</b>

### 2) Wood Products Manufacturing Sector

-Companies in this cluster build a wide variety of wood products from structural members to custom millwork.

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
32121	Engineered wood member and truss manufacturing	1.08
33712	Nonupholstered wood household furniture manufacturing	0.57
32191	Other millwork- including flooring	1.08
32199	Prefabricated wood building manufacturing	1.08
32111	Sawmills	1.08
33721	Custom architectural woodwork and millwork	0.57
<b>Cluster Employment (estimated)</b>		<b>397</b>

### 3) Machinery Manufacturing Cluster

-Companies in this cluster build a wide variety of motorized tools and motors.

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
33271	Machine shops	0.64
33329	All other industrial machinery manufacturing	1.36
33351	Metal cutting machine tool manufacturing	1.36
33399	Power-driven handtool manufacturing	1.45
33351	Metal forming machine tool manufacturing	1.36
33399	Fluid power pump and motor manufacturing	
<b>Cluster Employment (estimated)</b>		<b>699</b>

**Table A- 6. Detail of potential key industries**

#### 4) Electronic Equipment and Component Manufacturing Cluster

- Companies in this cluster manufacture a wide variety of technologically advanced electronic devices.

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
33441	Semiconductors and related device manufacturing	1.05
33451	Industrial process variable instruments	0.55
33451	Watch- clock- and other measuring and controlling devices	0.55
3343	Audio and video equipment manufacturing	0.55
33441	All other electronic component manufacturing	1.05
<b>Cluster Employment (estimated)</b>		<b>308</b>

#### 5) High Value Added Services Super Cluster

Companies in this super cluster are considered high value added services. They include financial services, business services, consulting services, management services, publishing services and information services.

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
<b>Financial Services Cluster</b>		
5221	Monetary authorities and depository credit intermediation	37.40
5412	Accounting and bookkeeping services	0.85
5222	Nondepository credit intermediation and related activities	0.93
523	Securities- commodity contracts- investments	
<b>Cluster Employment (estimated)</b>		<b>1,666</b>

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
<b>Business Services Cluster</b>		
5611	Office administrative services	0.69
5614	Business support services	0.69
54161	Management consulting services	0.28
5242	Insurance agencies- brokerages- and related services	0.82
5619	Other support services	0.70
5418	Advertising and related services	1.57
54151	Other computer related services, including facilities	0.68
<b>Cluster Employment (estimated)</b>		<b>3,222</b>

<b>NAICS</b>	<b>Description</b>	<b>LQ's</b>
<b>Information Services Cluster</b>		
5142	Data processing services	
5141	Information services	
51119	Database, directory, and other publishers	
51113	Book publishers	
518	ISPs, search portals, and data processing	5.38
32311	Commercial printing	2.39
<b>Cluster Employment (estimated)</b>		<b>1076</b>

**Note: Values are estimated due to disclosure issues in County Business Patterns Data**

**Table A- 6. Detail of potential key industries (continued)**

## Appendix B: Resource Assessment Survey Data – Web Respondents

Ulster County Resource Assessment Survey Data Web Respondents									
Which category best describes your business:									
	Local	Export		%Local	%Export				
We sell our products or services mostly within the county and the Hudson Valley (Exportly)	21	0		84%	16%				
We sell our products or services outside of the county and in neighboring states	0	1							
We sell our products or services outside of the county and throughout the country	0	1							
We sell products or services outside the county	0	1							
We are in the travel and tourism sector and sell our products and services mostly to visitors	0	1							
<b>Total Respondents</b>	<b>21</b>	<b>4</b>	<b>25</b>						
(skipped this question)	0	0	0						
How many employees are currently in your company? (Please check the most applicable box.)									
	Local	% of Total	Export	% of Total					
Less than 5	7	33%	0	0%					
5 to 10	3	14%	0	0%					
10 to 25	3	14%	0	0%					
25 to 100	3	14%	2	10%					
More than 100	2	10%	1	5%					
<b>Total Respondents</b>	<b>18</b>		<b>3</b>	<b>21</b>					
(skipped this question)	3		1	4					

What is your current percentage of full-time employees working more than 35 hours per week? (Please check the most applicable box.)									
	Local	% of Total	Export	% of Total					
Less than 10%	3	14%	0	0%					
10% to 2%	2	10%	0	0%					
25% to 50%	0	0%	0	0%					
More than 50%	13	62%	3	14%					
Total Respondents	18		3	21					
(skipped this question)	3		1	4					
How many new jobs have been created in your company in the past year? (Please check the most applicable box.)									
	Local	% of Total	Export	% of Total					
Reduced employment	3	14%	0	0%					
Steady employment	8	38%	1	5%					
Less than 5	4	19%	0	0%					
5 to 10	1	5%	2	10%					
10 to 25	2	10%	0	0%					
25 to 100	0	0%	0	0%					
More than 100	0	0%	0	0%					
Total Respondents	18		3	21					
(skipped this question)	3		1	4					
Is your reduction of jobs expected to continue?									
	Local	% of Total	Export	% of Total					
Yes	0	0%	0	0%					
No	2	100%	0	0%					
Total Respondents	2		0	2					
(skipped this question)	19		4	23					

Is your growth expected to continue?				
	Local	% of Total	Export	% of Total
Yes, but at a decreased rate	3	33%	1	11%
Yes, at about the same rate	3	33%	1	11%
Yes, at an increased rate	0	0%	0	0%
No	1	11%	0	0%
Total Respondents	7		2	9
(skipped this question)	14		2	16
What type of training does your organization provide your employees? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Employee Reward	1	6%	0	0%
On-the-Job Training	11	65%	2	12%
Apprenticeships	2	12%	1	6%
On-site Classroom Training	7	41%	1	6%
Time for Off-site Training	8	47%	2	12%
Workshops/Seminars	7	41%	1	6%
None	3	18%	0	0%
Total Respondents	15		2	17
(skipped this question)	6		2	8
Has your company experienced difficulty in finding skilled employees within the last year?				
	Local	% of Total	Export	% of Total
Yes	7	39%	1	6%
No	9	50%	1	6%
Total Respondents	16		2	18
(skipped this question)	5		2	7

Have you been offered contracts that you have turned away because you did not have the employee capacity to meet the need within the past 12 months?				
	Local	% of Total	Export	% of Total
Yes	3	16%	1	5%
No	14	74%	1	5%
Total Respondents	17		2	19
(skipped this question)	4		2	6
What is the biggest obstacle your business or organization faces over the next year (Check one)?				
	Local	% of Total	Export	% of Total
Weak sales or revenues	4	21%	0	0%
Availability/Cost of labor	0	0%	1	5%
Availability/Cost of obtaining financing	0	0%	0	0%
Regulatory/Legal obstacles	5	26%	0	0%
Cost of materials/utilities (e.g. energy)	1	5%	1	5%
Not applicable	7	37%	0	0%
Total Respondents	17		2	19
(skipped this question)	4		2	6
There are enough skilled workers in the county to meet our needs.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	2	11%
Disagree	3	16%	0	0%
Agree	12	63%	1	5%
Strongly agree	1	5%	0	0%
Total Respondents	16		3	19
(skipped this question)	5		1	6

There are enough administrative workers in the county to meet our needs.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	1	5%
Disagree	2	10%	1	5%
Agree	13	65%	1	5%
Strongly agree	2	10%	0	0%
Total Respondents	17		3	20
(skipped this question)	4		1	5
Workers generally have adequate technical skills to work in my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	1	5%	2	11%
Agree	15	79%	1	5%
Strongly agree	0	0%	0	0%
Total Respondents	16		3	19
(skipped this question)	5		1	6
Workers generally have adequate social skills to work in my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	1	5%
Disagree	3	16%	1	5%
Agree	13	68%	0	0%
Strongly agree	0	0%	1	5%
Total Respondents	16		3	19
(skipped this question)	5		1	6

New workers generally have the basic language math and communications skills.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	1	6%
Disagree	2	11%	1	6%
Agree	11	61%	1	6%
Strongly agree	2	11%	0	0%
Total Respondents	15		3	18
(skipped this question)	6		1	7
Workers generally give my company "a good day's work."				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	2	11%	0	0%
Agree	11	61%	1	6%
Strongly agree	3	17%	1	6%
Total Respondents	16		2	18
(skipped this question)	5		2	7
Frequent absenteeism is an issue of concern for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	3	16%	0	0%
Disagree	10	53%	2	11%
Agree	2	11%	1	5%
Strongly agree	1	5%	0	0%
Total Respondents	16		3	19
(skipped this question)	5		1	6

The county's workforce is generally affordable (for wages and benefits).				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	1	6%	0	0%
Agree	11	69%	2	13%
Strongly agree	2	13%	0	0%
Total Respondents	14		2	16
(skipped this question)	7		2	9
Wage and benefits costs in the county are:				
	Local	% of Total	Export	% of Total
Decreasing	0	0%	0	0%
Steady	6	38%	0	0%
Rising	8	50%	2	13%
Total Respondents	14		2	16
(skipped this question)	7		2	9
Though wage and benefits costs are rising I can still compete.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	1	8%	0	0%
Agree	9	75%	2	17%
Strongly agree	0	0%	0	0%
Total Respondents	10		2	12
(skipped this question)	11		2	13

Wage and benefits costs are rising everywhere not just in the county.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	0	0%	0	0%
Agree	9	75%	1	8%
Strongly agree	1	8%	1	8%
Total Respondents	10		2	12
(skipped this question)	11		2	13
Wage and benefits costs are rising faster in the county than elsewhere.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	8	67%	2	17%
Agree	2	17%	0	0%
Strongly agree	0	0%	0	0%
Total Respondents	10		2	12
(skipped this question)	11		2	13
Wage and benefits costs are too high and are a competitive disadvantage for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	6	50%	1	8%
Agree	4	33%	1	8%
Strongly agree	0	0%	0	0%
Total Respondents	10		2	12
(skipped this question)	11		2	13

How would your company rate the ability to obtain debt financing (e.g. a bank loan) at reasonable terms in the county (Check one)?									
	Local	% of Total	Export	% of Total					
Very difficult	0	0%	0	0%					
Difficult	0	0%	0	0%					
Average	6	35%	0	0%					
Easy	2	12%	0	0%					
Very easy	2	12%	1	6%					
Not applicable	5	29%	1	6%					
<b>Total Respondents</b>	<b>15</b>		<b>2</b>	<b>17</b>					
(skipped this question)	6		2	8					
How would your company or organization rate the ability to obtain equity financing (e.g. venture capital or other loans in exchange for an ownership stake) at reasonable terms in the county (Check one)?									
	Local	% of Total	Export	% of Total					
Very difficult	2	13%	0	0%					
Difficult	3	19%	1	6%					
Average	3	19%	0	0%					
Easy	0	0%	0	0%					
Very easy	1	6%	0	0%					
Not applicable	6	38%	0	0%					
<b>Total Respondents</b>	<b>15</b>		<b>1</b>	<b>16</b>					
(skipped this question)	6		3	9					
Please indicate your experience with the following types of financing over the past 3 years:									
<b>Local</b>	Obtained	Denied	Will need	N/A	<b>Export</b>	Obtained	Denied	Will need v	N/A
Working Capital	4	0	1	11	Working C	1	0	0	0
Equipment Loan	3	0	0	12	Equipment	1	0	0	0
Commercial Mortgage	3	0	0	11	Commercial	1	0	0	0
Second Mortgage	2	0	0	12	Second M	1	0	0	0
<b>Total Respondents</b>	<b>17</b>								
(skipped this question)	8								

Does any of your current debt (mortgage second mortgage) come due within the next 3 years?									
	Local	% of Total	Export	% of Total					
Yes	2	12%	1	6%					
No	4	24%	0	0%					
N/A	10	59%	0	0%					
Total Respondents	16		1	17					
(skipped this question)	5		3	8					
Please indicate the method(s) used for obtaining capital for your business within the past 3 years:									
	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 years	Export	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 years
Public sector grants-financial (e.g. tax) incentives	3	2	0	0		1	0	0	0
Outside investors	1	1	0	0		0	0	0	1
Self-funded/organic growth	4	5	0	0		1	0	0	0
Sweat equity	3	4	0	0		0	1	0	0
Bank loan	1	1	0	1		0	1	0	0
Total Respondents	13								
(skipped this question)	12								
To what extent are the natural resources of the county important to your business?									
	Local	% of Total	Export	% of Total					
To no extent	3	17%	0	0%					
To a small extent	0	0%	0	0%					
To a moderate extent	5	28%	0	0%					
To a great extent	4	22%	0	0%					
To a very great extent	5	28%	1	6%					

Total Respondents	17		1	18					
(skipped this question)	4		3	7					
How are the county's natural resources and/or natural beauty (e.g. for outdoor recreation) of the county used in your business?									
	Local	% of Total	Export	% of Total					
Directly in the production of my comp	2	12%	0	0%					
Directly for attracting customers (e.g	3	18%	0	0%					
Indirectly to attract and maintain a hi	2	12%	1	6%					
Indirectly because it is important for	4	24%	0	0%					
This is not applicable to my business	5	29%	0	0%					
Total Respondents	16		1	17					
(skipped this question)	5		3	8					
My company's access to the following services in the county is:									
<b>Local</b>	Acceptable	Unacceptable			<b>Export</b>	Acceptable	Unacceptable		
Surface transportation (e.g. rail roads	12	3			Surface t	0	1		
Reliable air transportation	12	3			Reliable a	0	1		
Water (Drinking and processing)	15	1			Water (D	1	0		
Wastewater treatment (Sewer)	12	4			Wastewa	0	1		
Wastewater treatment (Septic)	10	3			Wastewa	1	0		
Employee housing	7	7			Employee	0	1		
Reliable electric (other) power	14	1			Reliable e	1	0		
Solid waste management services	14	1			Solid was	1	0		
Industrial Space/Sites	7	7			Industrial	0	1		
Incubator space	7	5			Incubator	1	0		
Total Respondents	17								
(skipped this question)	8								

My company's costs for the following services in the county are:										
<b>Local</b>	Affordable	Not Affordable			<b>Export</b>	Affordable	Not Affordable			
Surface transportation (e.g. rail roads)	14	0			Surface t	1	0			
Reliable air transportation	12	2			Reliable a	0	1			
Water (Drinking and processing)	14	0			Water (D	1	0			
Wastewater treatment (Sewer)	13	1			Wastewa	1	0			
Wastewater treatment (Septic)	10	1			Wastewa	1	0			
Employee housing	4	9			Employee	0	1			
Reliable electric (other) power	13	0			Reliable e	0	1			
Solid waste management services	12	0			Solid was	0	1			
Industrial Space/Sites	9	2			Industrial	0	1			
Incubator space	7	2			Incubator	1	0			
<b>Total Respondents</b>	<b>16</b>									
(skipped this question)	9									
The quality my company receives from the following county services is:										
<b>Local</b>	Very poor	Poor	Good	Very good	<b>Export</b>	Very poor	Poor	Good	Very good	
Surface transportation (e.g. rail roads)	0	1	12	1	Surface tra	0	0	1	0	
Reliable air transportation	1	3	8	0	Reliable air	1	0	0	0	
Water (Drinking and processing)	2	0	6	6	Water (Dri	0	1	0	0	
Wastewater treatment (Sewer)	3	0	7	4	Wastewate	0	1	0	0	
Wastewater treatment (Septic)	0	2	7	2	Wastewate	0	0	1	0	
Employee housing	0	6	5	0	Employee h	1	0	0	0	
Reliable electric (other) power	0	1	9	3	Reliable el	0	0	1	0	
Solid waste management services	0	0	9	4	Solid waste	0	0	1	0	
Industrial Space/Sites	1	2	7	0	Industrial S	1	0	0	0	
Incubator space	0	3	5	0	Incubator s	0	0	1	0	
<b>Total Respondents</b>	<b>16</b>									
(skipped this question)	9									

Does your company use the Internet to:										
<b>Local</b>	Yes	No	N/A			<b>Export</b>	Yes	No	N/A	
Advertise find customers or find workers?	11	4	0			Advertise	1	0	0	
Take orders and/or display your products and services?	11	3	1			Take ord	1	0	0	
Total Respondents	16									
(skipped this question)	9									
To what extent are the following important to your business?										
<b>Local</b>	To no extent	To a small extent	To a moderate extent	To a great extent	To a very great extent	<b>Export</b> To no extent	<b>Export</b> To a small extent	<b>Export</b> To a moderate extent	<b>Export</b> To a great extent	<b>Export</b> To a very great extent
Affordable telecommunications services	0	0	4	6	5	0	0	0	0	1
Higher education institutions for research or business education/worker training	1	5	4	3	2	0	0	0	0	1
Affordable technical education	3	3	4	2	3	0	0	0	0	1
Affordable non-degree technical training (e.g. seminars/workshops)	3	3	4	2	3	0	0	0	1	0
Affordable research and development or laboratory services	5	3	3	3	0	0	0	0	0	1
Affordable technology transfer services	4	2	4	3	1	0	0	0	0	1
Total Respondents	16									
(skipped this question)	9									

Which of the following graduates does/would your company consider hiring? (Select all that apply.)							
	Local	% of Total	Export	% of Total			
High School	9	60%	1	7%			
2-Year College	10	67%	1	7%			
4-Year College	13	87%	1	7%			
Other (please specify)	2	13%	1	7%			
Total Respondents	14		1	15			
(skipped this question)	7		3	10			
	<i>Other Responses - Local</i>			<i>Other Responses - Export</i>			
	1	Masters Degree		1	advanced Phd degrees		
	2	Technical Schools					
How would you rate your company's access to the following County's institutional resources?							
<b>Local</b>	Acceptable	Not acceptable			<b>Export</b>	Acceptable	Not Acceptable
K-12 schools	13	0			K-12 sch	1	0
Health care	11	4			Health ca	1	0
Cultural resources (e.g. the arts)	14	1			Cultural r	1	0
Recreational services	15	0			Recreatic	1	0
Religious or spiritual resources	14	0			Religious	1	0
Social services	14	0			Social se	1	0
State government services	10	3			State gov	1	0
County government services	11	2			County g	1	0
Local government services	11	2			Export gc	1	0
Services to help grow my business	10	3			Services	1	0
Total Respondents	16						
(skipped this question)	9						

How would you rate the quality of services your company receives from the following County institutional resources?									
<b>Local</b>	Acceptable	Not Acceptable				<b>Export</b>	Acceptable	Not Acceptable	
K-12 schools	10	1				K-12 sch	0	1	
Health care	10	3				Health ca	1	0	
Cultural resources (e.g. the arts)	15	0				Cultural r	1	0	
Recreational services	12	2				Recreatic	1	0	
Religious or spiritual resources	12	0				Religious	1	0	
Social services	12	2				Social se	1	0	
State government services	8	4				State gov	1	0	
County government services	9	4				County g	1	0	
Local government services	8	4				Export gc	1	0	
Services to help grow my business	8	5				Services	1	0	
Total Respondents	16								
(skipped this question)	9								
How would you rate the affordability or competitiveness for the following County institutional resources?									
<b>Local</b>	Acceptable	Not Acceptable				<b>Export</b>	Acceptable	Not Acceptable	
K-12 schools	5	6				K-12 sch	0	1	
Health care	7	7				Health ca	0	1	
Cultural resources (e.g. the arts)	14	0				Cultural r	1	0	
Recreational services	13	1				Recreatic	1	0	
Religious or spiritual resources	12	0				Religious	1	0	
Social services	10	3				Social se	1	0	
State government services	4	6				State gov	1	0	
County government services	5	6				County g	1	0	
Local government services	4	6				Export gc	1	0	
Services to help grow my business	7	2				Services	1	0	
Total Respondents	15								
(skipped this question)	10								

The local review development climate in the county is:												
	Local	% of Total	Export	% of Total								
Very predictable	0	0%	0	0%								
Somewhat predictable	9	56%	0	0%								
Unpredictable	5	31%	1	6%								
Don't know	1	6%	0	0%								
Total Respondents	15		1	16								
(skipped this question)	6		3	9								
To what extent are maintenance and improvement in the County's "quality of life" important to your business?												
	Local	% of Total	Export	% of Total								
To no extent	1	6%	0	0%								
To a small extent	2	12%	0	0%								
To a moderate extent	1	6%	0	0%								
To a great extent	6	35%	1	6%								
To a very great extent	6	35%	0	0%								
Total Respondents	16		1	17								
(skipped this question)	5		3	8								
If you have faced obstacles to investing and/or growing your business in the county over the last year what steps might UCDC or governmental agencies do to help your company succeed in Ulster County?												
<b>Open ended responses</b>	Local		Export	Total								
Total Respondents	8		1	9								
(skipped this question)	13		3	16								
<b>See Appendix F, Part 4</b>												

How do you expect overall business conditions to change over the 12 months?				
	Local	% of Total	Export	% of Total
Significant worsening	1	7%	0	0%
Modest worsening	6	40%	0	0%
No change	4	27%	0	0%
Modest improvement	3	20%	0	0%
Significant improvement	0	0%	1	7%
Total Respondents	14		1	15
(skipped this question)	7		3	10
Is your company or organization investing in new equipment or software over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	1	6%	0	0%
Modest reductions are being made or	0	0%	0	0%
No change	8	50%	0	0%
Modest investments are being made	4	25%	0	0%
Significant investments are being made	2	13%	1	6%
Total Respondents	15		1	16
(skipped this question)	6		3	9
Is your company or organization investing in new office or other space over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	0	0%	0	0%
Modest reductions are being made or	0	0%	0	0%
No change	12	80%	0	0%
Modest investments are being made	2	13%	0	0%
Significant investments are being made	0	0%	1	7%
Total Respondents	14		1	15
(skipped this question)	7		3	10

What attracted your company to locate in Ulster County? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Affordable location	3	20%	1	7%
Available talent	1	7%	1	7%
Tax incentives	0	0%	0	0%
Available customer base	3	20%	1	7%
Available suppliers	0	0%	0	0%
Infrastructure	0	0%	0	0%
Business network	2	13%	0	0%
Potential growth	3	20%	1	7%
Lack of competition	2	13%	0	0%
Quality of life	4	27%	1	7%
Original founder lives(d) here	7	47%	1	7%
Other (please specify)	2	13%	0	0%
Total Respondents	15			
(skipped this question)	10			
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>	
	1 family			
	2 the location is the reason			
What keeps your company in Ulster County? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Affordable location	3	20%	1	7%
Available talent	1	7%	1	7%
Tax incentives	0	0%	0	0%
Available customer base	4	27%	1	7%
Available suppliers	0	0%	0	0%
Infrastructure	0	0%	0	0%
Business network	3	20%	1	7%
Potential growth	7	47%	1	7%
Lack of competition	2	13%	0	0%
Quality of life	6	40%	1	7%
Original founder lives(d) here	6	40%	0	0%
Other (please specify)	2	13%	0	0%

Total Respondents	15													
(skipped this question)	10													
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>											
1	Mandated jurisdiction/	Question N/A												
2	location													
Which of the following resources in Ulster County does your business use? (Select all that apply.)														
	Local	% of Total	Export	% of Total										
Hudson Valley Center For Innovation	1	9%	1	9%										
Kingston-Ulster Empire Zone	6	55%	1	9%										
Mid Hudson Small Business Develop	1	9%	0	0%										
Ulster County Development Corpora	5	45%	1	9%										
Ulster County Industrial Developmen	4	36%	0	0%										
Ulster County Office of Employment	4	36%	0	0%										
Ulster County Tourism Department	1	9%	0	0%										
Other (please specify)	1	9%	0	0%										
Total Respondents	11													
(skipped this question)	14													
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>											
1	none													
Which of the following resources outside of Ulster County does your business use? (Select all that apply.)														
	Local	% of Total	Export	% of Total										
Catskill Watershed Corporation	2	33%	0	0%										
Empire State Development Corporat	3	50%	1	17%										
Hudson Valley Economic Developme	3	50%	1	17%										
Hudson Valley Technology Developm	2	33%	1	17%										
Other (please specify)	2	33%	0	0%										
Total Respondents	6													
(skipped this question)	18													
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>											
1	NYBDC													
2	none													

## Appendix B: Resource Assessment Survey Data – Targeted Respondents

Ulster County Resource Assessment Survey Data Targeted Respondents										
Which category best describes your business:										
	Local	Export		%Local	%Export					
We sell our products or services mostly within the county and the Hudson Valley (Exportly)	47	0		56%	44%					
We sell our products or services outside of the county and in neighboring states	0	7								
We sell our products or services outside of the county and throughout the country	0	9								
We sell products or services outside the county	0	14								
We are in the travel and tourism sector and sell our products and services mostly to visitors	0	7								
<b>Total Respondents</b>	<b>47</b>	<b>37</b>	<b>84</b>							
(skipped this question)			0							
How many employees are currently in your company? (Please check the most applicable box.)										
	Local	% of Total	Export	% of Total						
Less than 5	21	26%	21	26%						
5 to 10	8	10%	6	7%						
10 to 25	7	9%	3	4%						
25 to 100	8	10%	5	6%						
More than 100	2	2%	1	1%						
<b>Total Respondents</b>	<b>46</b>		<b>36</b>	<b>82</b>						
(skipped this question)	1		1	2						

What is your current percentage of full-time employees working more than 35 hours per week? (Please check the most applicable box.)					
	Local	% of Total	Export	% of Total	
Less than 10%	8	10%	9	11%	
10% to 2%	6	8%	1	1%	
25% to 50%	1	1%	1	1%	
More than 50%	31	39%	23	29%	
Total Respondents	46		34	80	
(skipped this question)	1		3	4	
How many new jobs have been created in your company in the past year? (Please check the most applicable box.)					
	Local	% of Total	Export	% of Total	
Reduced employment	5	6%	6	8%	
Steady employment	22	28%	19	24%	
Less than 5	15	19%	4	5%	
5 to 10	1	1%	2	3%	
10 to 25	2	3%	1	1%	
25 to 100	1	1%	2	3%	
More than 100	0	0%	0	0%	
Total Respondents	46		34	80	
(skipped this question)	1		3	4	
Is your reduction of jobs expected to continue?					
	Local	% of Total	Export	% of Total	
Yes	0	0%	2	20%	
No	4	40%	4	40%	
Total Respondents	4		6	10	
(skipped this question)	43		31	74	

Is your growth expected to continue?										
	Local	% of Total	Export	% of Total						
Yes, but at a decreased rate	3	11%	2	7%						
Yes, at about the same rate	11	41%	4	15%						
Yes, at an increased rate	2	7%	2	7%						
No	3	11%	0	0%						
Total Respondents	19		8	27						
(skipped this question)	28		29	57						
What type of training does your organization provide your employees? (Select all that apply.)										
	Local	% of Total	Export	% of Total						
Employee Reward	3	4%	2	3%						
On-the-Job Training	33	41%	21	26%						
Apprenticeships	6	8%	1	1%						
On-site Classroom Training	11	14%	4	5%						
Time for Off-site Training	19	24%	7	9%						
Workshops/Seminars	26	33%	12	15%						
None	8	10%	9	11%						
Total Respondents	46		34	80						
(skipped this question)	1		3	4						
Has your company experienced difficulty in finding skilled employees within the last year?										
	Local	% of Total	Export	% of Total						
Yes	16	20%	15	19%						
No	29	37%	19	24%						
Total Respondents	45		34	79						
(skipped this question)	2		3	5						

Have you been offered contracts that you have turned away because you did not have the employee capacity to meet the need within the past 12 months?										
	Local	% of Total	Export	% of Total						
Yes	7	9%	3	4%						
No	38	48%	32	40%						
Total Respondents	45		35	80						
(skipped this question)	2		2	4						
What is the biggest obstacle your business or organization faces over the next year (Check one)?										
	Local	% of Total	Export	% of Total						
Weak sales or revenues	13	16%	8	10%						
Availability/Cost of labor	6	8%	6	8%						
Availability/Cost of obtaining financing	4	5%	1	1%						
Regulatory/Legal obstacles	8	10%	0	0%						
Cost of materials/utilities (e.g. energy)	2	3%	3	4%						
Not applicable	12	15%	16	20%						
Total Respondents	45		34	79						
(skipped this question)	2		3	5						
There are enough skilled workers in the county to meet our needs.										
	Local	% of Total	Export	% of Total						
Strongly disagree	1	1%	4	5%						
Disagree	13	18%	13	18%						
Agree	25	34%	13	18%						
Strongly agree	2	3%	2	3%						
Total Respondents	41		32	73						
(skipped this question)	6		5	11						

There are enough administrative workers in the county to meet our needs.										
	Local	% of Total	Export	% of Total						
Strongly disagree	1	1%	1	1%						
Disagree	9	13%	9	13%						
Agree	27	38%	19	26%						
Strongly agree	4	6%	2	3%						
Total Respondents	41		31	72						
(skipped this question)	6		6	12						
Workers generally have adequate technical skills to work in my company.										
	Local	% of Total	Export	% of Total						
Strongly disagree	1	1%	3	4%						
Disagree	18	25%	12	17%						
Agree	23	32%	12	17%						
Strongly agree	1	1%	2	3%						
Total Respondents	43		29	72						
(skipped this question)	4		8	12						
Workers generally have adequate social skills to work in my company.										
	Local	% of Total	Export	% of Total						
Strongly disagree	3	4%	3	4%						
Disagree	9	13%	4	6%						
Agree	29	40%	21	29%						
Strongly agree	1	1%	2	3%						
Total Respondents	42		30	72						
(skipped this question)	5		7	12						

New workers generally have the basic language math and communications skills.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	2	3%
Disagree	8	12%	5	7%
Agree	29	42%	19	28%
Strongly agree	2	3%	3	4%
Total Respondents	40		29	69
(skipped this question)	7		8	15
Workers generally give my company "a good day's work."				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	4	6%	5	7%
Agree	30	43%	19	27%
Strongly agree	6	9%	6	9%
Total Respondents	40		30	70
(skipped this question)	7		7	14
Frequent absenteeism is an issue of concern for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	7	10%	7	10%
Disagree	27	39%	14	20%
Agree	3	4%	9	13%
Strongly agree	2	3%	0	0%
Total Respondents	39		30	69
(skipped this question)	8		7	15

The county's workforce is generally affordable (for wages and benefits).				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	0	0%
Disagree	8	12%	7	10%
Agree	28	41%	23	34%
Strongly agree	1	1%	0	0%
Total Respondents	38		30	68
(skipped this question)	9		7	16
Wage and benefits costs in the county are:				
	Local	% of Total	Export	% of Total
Decreasing	3	4%	0	0%
Steady	8	12%	7	10%
Rising	29	43%	20	30%
Total Respondents	40		27	67
(skipped this question)	7		10	17
Though wage and benefits costs are rising I can still compete.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	1	2%
Disagree	7	14%	6	12%
Agree	20	39%	12	24%
Strongly agree	1	2%	4	8%
Total Respondents	28		23	51
(skipped this question)	19		14	33

Wage and benefits costs are rising everywhere not just in the county.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	1	2%
Disagree	1	2%	1	2%
Agree	24	48%	15	30%
Strongly agree	3	6%	5	10%
Total Respondents	28		22	50
(skipped this question)	19		15	34
Wage and benefits costs are rising faster in the county than elsewhere.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	18	39%	13	28%
Agree	6	13%	6	13%
Strongly agree	2	4%	1	2%
Total Respondents	26		20	46
(skipped this question)	21		17	38
Wage and benefits costs are too high and are a competitive disadvantage for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	2%	0	0%
Disagree	18	39%	11	24%
Agree	7	15%	7	15%
Strongly agree	1	2%	1	2%
Total Respondents	27		19	46
(skipped this question)	20		18	38

How would your company rate the ability to obtain debt financing (e.g. a bank loan) at reasonable terms in the county (Check one)?										
	Local	% of Total	Export	% of Total						
Very difficult	1	1%	0	0%						
Difficult	4	6%	8	12%						
Average	16	23%	9	13%						
Easy	6	9%	4	6%						
Very easy	4	6%	4	6%						
Not applicable	9	13%	4	6%						
Total Respondents	40		29	69						
(skipped this question)	7		8	15						
How would your company or organization rate the ability to obtain equity financing (e.g. venture capital or other loans in exchange for an ownership stake) at reasonable terms in the county (Check one)?										
	Local	% of Total	Export	% of Total						
Very difficult	2	3%	2	3%						
Difficult	7	10%	7	10%						
Average	5	7%	6	9%						
Easy	4	6%	1	1%						
Very easy	3	4%	0	0%						
Not applicable	18	26%	13	19%						
Total Respondents	39		29	68						
(skipped this question)	8		8	16						
Please indicate your experience with the following types of financing over the past 3 years:										
Local	Obtained	Denied	Will need	N/A	Export	Obtained	Denied	Will need	N/A	
Working Capital	13	2	1	20	Working Capital	10	2	3	14	
Equipment Loan	12	0	1	22	Equipment Loan	7	1	4	14	
Commercial Mortgage	11	0	1	24	Commercial Mortgage	6	1	3	16	
Second Mortgage	6	0	0	29	Second Mortgage	6	1	0	20	

Total Respondents	68									
(skipped this question)	16									
Does any of your current debt (mortgage second mortgage) come due within the next 3 years?										
	Local	% of Total	Export	% of Total						
Yes	7	10%	5	7%						
No	12	17%	13	19%						
N/A	20	29%	12	17%						
Total Respondents	39		30	69						
(skipped this question)	8		7	15						
Please indicate the method(s) used for obtaining capital for your business within the past 3 years:										
	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 years	Export	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 years	
<b>Local</b>					<b>Export</b>					
Public sector grants-financial (e.g. tax relief)	1	2	2	4	Public sector grants-financial	0	3	1	1	
Outside investors	4	3	0	2	Outside investors	1	1	1	1	
Self-funded/organic growth	11	13	0	1	Self-funded/organic growth	5	8	0	1	
Sweat equity	5	8	0	1	Sweat equity	6	7	0	1	
Bank loan	2	15	0	1	Bank loan	2	10	0	3	
Total Respondents	51									
(skipped this question)	33									
To what extent are the natural resources of the county important to your business?										
	Local	% of Total	Export	% of Total						
To no extent	8	12%	14	21%						
To a small extent	9	13%	6	9%						
To a moderate extent	11	16%	1	1%						
To a great extent	8	12%	5	7%						
To a very great extent	1	1%	4	6%						

Total Respondents	37		30	67						
(skipped this question)	10		7	17						
How are the county's natural resources and/or natural beauty (e.g. for outdoor recreation) of the county used in your business?										
	Local	% of Total	Export	% of Total						
Directly in the production of my company's good(s) and/or service(s) (e.g. farms natural resource manufacturing)	2	3%	1	1%						
Directly for attracting customers (e.g. tourists) to my business or are used in our marketing efforts	10	15%	5	7%						
Indirectly to attract and maintain a high quality work force workers	5	7%	4	6%						
Indirectly because it is important for recruitment and retention of managers	0	0%	1	1%						
This is not applicable to my business	20	30%	19	28%						
Total Respondents	37		30	67						
(skipped this question)	10		7	17						
My company's access to the following services in the county is:										
<b>Local</b>	Acceptable	Unacceptabl			<b>Export</b>	Acceptable	Unacceptable			
Surface transportation (e.g. rail road)	27	6			Surface tra	21	4			
Reliable air transportation	20	10			Reliable air	18	7			
Water (Drinking and processing)	30	4			Water (Drin	22	3			
Wastewater treatment (Sewer)	26	7			Wastewate	19	3			
Wastewater treatment (Septic)	24	6			Wastewate	20	3			

Employee housing	11	20			Employee h	14	8		
Reliable electric (other) power	32	4			Reliable ele	20	3		
Solid waste management services	29	2			Solid waste	19	4		
Industrial Space/Sites	19	9			Industrial S	16	5		
Incubator space	22	5			Incubator s	12	4		
Total Respondents	61								
(skipped this question)	23								
My company's costs for the following services in the county are:									
<b>Local</b>	Affordable	Not Affordab			<b>Export</b>	Affordable	Not Affordable		
Surface transportation (e.g. rail road)	27	4			Surface tra	21	1		
Reliable air transportation	21	8			Reliable air	17	3		
Water (Drinking and processing)	24	5			Water (Dri	19	2		
Wastewater treatment (Sewer)	22	6			Wastewate	14	4		
Wastewater treatment (Septic)	23	2			Wastewate	16	2		
Employee housing	9	19			Employee h	5	10		
Reliable electric (other) power	25	9			Reliable ele	15	5		
Solid waste management services	23	3			Solid waste	16	2		
Industrial Space/Sites	16	6			Industrial S	11	4		
Incubator space	17	5			Incubator s	7	3		
Total Respondents	59								
(skipped this question)	25								
The quality my company receives from the following county services is:									
<b>Local</b>	Very poor	Poor	Good	Very good	<b>Export</b>	Very poor	Poor	Good	Very good
Surface transportation (e.g. rail road)	0	4	20	4	Surface tra	0	3	17	2
Reliable air transportation	2	6	14	0	Reliable air	1	7	12	0
Water (Drinking and processing)	0	5	18	8	Water (Dri	0	1	18	2
Wastewater treatment (Sewer)	1	6	17	2	Wastewate	0	1	14	3
Wastewater treatment (Septic)	2	4	14	3	Wastewate	1	0	13	2
Employee housing	2	10	11	0	Employee h	1	7	5	0
Reliable electric (other) power	0	5	17	6	Reliable ele	0	2	14	4

Solid waste management services	1	4	19	1	Solid waste	0	4	13	2	
Industrial Space/Sites	1	6	13	0	Industrial S	0	2	11	1	
Incubator space	1	4	15	2	Incubator s	0	4	9	0	
Total Respondents	58									
(skipped this question)	26									
Does your company use the Internet to:										
<b>Local</b>	Yes	No	N/A		<b>Export</b>	Yes	No	N/A		
Advertise find customers or find work	31	1	4		Advertise fi	23	4	3		
Take orders and/or display your products	24	7	5		Take order	26	2	1		
Total Respondents	67									
(skipped this question)	17									
To what extent are the following important to your business?										
<b>Local</b>	To no extent	To a small extent	To a moderate extent	To a great extent	To a very great extent	<b>Export</b> To no extent	<b>Export</b> To a small extent	<b>Export</b> To a moderate extent	<b>Export</b> To a great extent	<b>Export</b> To a very great extent
Affordable telecommunications services	0	3	13	7	14	1	0	5	7	16
Higher education institutions for research or business education/worker training	2	4	12	9	6	5	3	13	4	4
Affordable technical education	5	1	14	7	7	4	6	13	3	2
Affordable non-degree technical training (e.g. seminars/workshops)	2	3	17	7	5	4	7	9	4	2
Affordable research and development or laboratory services	14	8	6	2	2	14	7	2	3	1
Affordable technology transfer services	11	6	8	3	4	7	8	5	3	3

Total Respondents	67								
(skipped this question)	17								
Which of the following graduates does/would your company consider hiring? (Select all that apply.)									
	Local	% of Total	Export	% of Total					
High School	19	30%	12	19%					
2-Year College	21	33%	21	33%					
4-Year College	31	49%	22	35%					
Other (please specify)	6	10%	7	11%					
Total Respondents	36		27	63					
(skipped this question)	11		10	21					
	<i>Other Responses - Local</i>				<i>Other Responses - Export</i>				
	1 MDs			1 years of professional service equivalents					
	2 trade school			2 post grad					
	3 MBA			3 not applicable					
	4 Must be interested in my business			4 skilled craftspeople					
	5 manual dexterity			5 All of the above					
	6 Masters Degree			6 Graduate students					
				7 LICENSED CAPT.					
How would you rate your company's access to the following County's institutional resources?									
<b>Local</b>	Acceptable	Not acceptal			<b>Export</b>	Acceptable	Not Acceptable		
K-12 schools	24	4			K-12 schoo	13	4		
Health care	20	12			Health care	16	8		
Cultural resources (e.g. the arts)	28	4			Cultural res	21	0		
Recreational services	29	3			Recreation	19	2		
Religious or spiritual resources	27	2			Religious o	16	0		
Social services	26	3			Social serv	13	2		
State government services	23	6			State gove	12	5		
County government services	26	4			County gov	13	6		
Local government services	25	7			Export gov	12	6		
Services to help grow my business	24	6			Services to	10	8		

Total Respondents	55								
(skipped this question)	29								
How would you rate the quality of services your company receives from the following County institutional resources?									
<b>Local</b>	Acceptable	Not Acceptable				<b>Export</b>	Acceptable	Not Acceptable	
K-12 schools	21	5				K-12 schools	13	4	
Health care	17	10				Health care	16	8	
Cultural resources (e.g. the arts)	24	2				Cultural resources	21	0	
Recreational services	24	2				Recreation	19	2	
Religious or spiritual resources	24	2				Religious or spiritual resources	16	0	
Social services	23	1				Social services	13	2	
State government services	19	4				State government services	12	5	
County government services	21	5				County government services	13	6	
Local government services	19	7				Export government services	12	6	
Services to help grow my business	22	7				Services to help grow my business	10	8	
Total Respondents	55								
(skipped this question)	29								
How would you rate the affordability or competitiveness for the following County institutional resources?									
<b>Local</b>	Acceptable	Not Acceptable				<b>Export</b>	Acceptable	Not Acceptable	
K-12 schools	17	13				K-12 schools	12	5	
Health care	11	19				Health care	9	14	
Cultural resources (e.g. the arts)	22	7				Cultural resources	20	0	
Recreational services	26	4				Recreation	17	1	
Religious or spiritual resources	26	2				Religious or spiritual resources	17	0	
Social services	19	7				Social services	14	1	
State government services	17	12				State government services	11	5	
County government services	17	12				County government services	11	5	
Export government services	18	11				Export government services	13	4	
Services to help grow my business	21	10				Services to help grow my business	9	8	
Total Respondents	59								
(skipped this question)	25								

The Export review development climate in the county is:										
	Local	% of Total	Export	% of Total						
Very predictable	5	8%	1	2%						
Somewhat predictable	9	15%	8	13%						
Unpredictable	13	21%	8	13%						
Don't know	8	13%	9	15%						
Total Respondents	35		26	61						
(skipped this question)	12		11	23						
To what extent are maintenance and improvement in the County's "quality of life" important to your business?										
	Local	% of Total	Export	% of Total						
To no extent	2	3%	1	2%						
To a small extent	4	6%	2	3%						
To a moderate extent	7	11%	13	21%						
To a great extent	15	24%	5	8%						
To a very great extent	7	11%	7	11%						
Total Respondents	35		28	63						
(skipped this question)	12		9	21						
If you have faced obstacles to investing and/or growing your business in the county over the last year what steps might UCDC or governmental agencies do to help your company succeed in Ulster County?										
<b>Open ended responses</b>										
Total Respondents	17		13	30						
(skipped this question)	30		24	54						
<b>See Appendix F, Part 4</b>										

How do you expect overall business conditions to change over the 12 months?				
	Local	% of Total	Export	% of Total
Significant worsening	0	0%	1	2%
Modest worsening	12	19%	9	15%
No change	10	16%	9	15%
Modest improvement	10	16%	8	13%
Significant improvement	1	2%	2	3%
Total Respondents	33		29	62
(skipped this question)	14		8	22
Is your company or organization investing in new equipment or software over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	0	0%	0	0%
Modest reductions are being made	1	2%	0	0%
No change	8	13%	9	14%
Modest investments are being made	24	38%	15	24%
Significant investments are being made	1	2%	5	8%
Total Respondents	34		29	63
(skipped this question)	13		8	21
Is your company or organization investing in new office or other space over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	0	0%	1	2%
Modest reductions are being made	0	0%	0	0%
No change	20	32%	19	30%
Modest investments are being made	8	13%	4	6%
Significant investments are being made	6	10%	5	8%
Total Respondents	34		29	63
(skipped this question)	13		8	21

What attracted your company to locate in Ulster County? (Select all that apply.)										
	Local	% of Total	Export	% of Total						
Affordable location	10	16%	12	19%						
Available talent	3	5%	3	5%						
Tax incentives	3	5%	1	2%						
Available customer base	12	19%	3	5%						
Available suppliers	0	0%	0	0%						
Infrastructure	2	3%	1	2%						
Business network	6	10%	2	3%						
Potential growth	12	19%	3	5%						
Lack of competition	5	8%	1	2%						
Quality of life	15	24%	15	24%						
Original founder lives(d) here	20	32%	14	22%						
Other (please specify)	7	11%	8	13%						
Total Respondents	63									
(skipped this question)	21									
	<i>Other Responses - Local</i>					<i>Other Responses - Export</i>				
	1	In Dutchess County				1	live here			
	2	proximity to family members				2	this is the only place to do what I do			
	3	formed in conjunction with IBM				3	Acquisition was available			
	4	Home business, ex IBM				4	Environment, Catskill Mtns			
	5	We are not located in Ulster-we work with Ulster B				5	I live here and love the County			
	6	Grew up here				6	family and beauty of location			
	7	We were very young at the time we purchased and restored our building, at the time we had nothing to loose and everything to gain.				7	I live here			
						8	HUDSON RIVER			

What keeps your company in Ulster County? (Select all that apply.)										
	Local	% of Total	Export	% of Total						
Affordable location	10	17%	10	17%						
Available talent	3	5%	2	3%						
Tax incentives	3	5%	1	2%						
Available customer base	14	23%	4	7%						
Available suppliers	2	3%	0	0%						
Infrastructure	3	5%	5	8%						
Business network	12	20%	2	3%						
Potential growth	16	27%	5	8%						
Lack of competition	5	8%	3	5%						
Quality of life	14	23%	17	28%						
Original founder lives(d) here	18	30%	13	22%						
Other (please specify)	2	3%	6	10%						
Total Respondents	60									
(skipped this question)	24									
	<i>Other Responses - Local</i>					<i>Other Responses - Export</i>				
	1	Chartered to serve area			1	live here				
	2	Building, cannot be re-produced			2	Acquired business here				
					3	I live here and love the County				
					4	family and beauty of location				
					5	I live here				
					6	26 YRS OF WORKING HERE				
Which of the following resources in Ulster County does your business use? (Select all that apply.)										
	Local	% of Total	Export	% of Total						
Hudson Valley Center For Innovation	3	8%	3	8%						
Kingston-Ulster Empire Zone	10	25%	4	10%						
Mid Hudson Small Business Develop	11	28%	3	8%						
Ulster County Development Corpora	11	28%	3	8%						
Ulster County Industrial Developmer	5	13%	1	3%						
Ulster County Office of Employment	6	15%	1	3%						
Ulster County Tourism Department	5	13%	3	8%						
Other (please specify)	6	15%	7	18%						

Total Respondents	40								
(skipped this question)	44								
	<i>Other Responses - Local</i>				<i>Other Responses - Export</i>				
1	I didn't know about some of these resources				1	None currently			
2	One Stop				2	none of the above			
3	planning dept				3	no contact with above			
4	Ulster County Chamber of Commerce				4	CofC			
5	New Paltz Cmanber of commerce				5	Chamber			
6	Ulster Chamber of Commerce				6	Ulster Chamber of Commerce			
					7	TRADE GROUPS			
Which of the following resources outside of Ulster County does your business use? (Select all that apply.)									
	Local	% of Total	Export	% of Total					
Catskill Watershed Corporation	2	11%	0	0%					
Empire State Development Corporat	9	47%	2	11%					
Hudson Valley Economic Developme	4	21%	0	0%					
Hudson Valley Technology Developr	1	5%	0	0%					
Other (please specify)	2	11%	5	26%					
Total Respondents	19								
(skipped this question)	65								
	<i>Other Responses - Local</i>				<i>Other Responses - Export</i>				
1	Dutchess County IDA, EDZ				1	NY Office of Court			
2	other county Chambers of Commerce				2	no contact with above			
					3	SBA			
					4	NYBDC			
					5	TOURISM DEPT			

## Appendix B: Resource Assessment Survey Data – Combined Respondents

Ulster County Resource Assessment Survey Data Combined Respondents										
Which category best describes your business:										
	Local	Export		%Local	%Export					
We sell our products or services mostly within the county and the Hudson Valley (Exportly)	68	0		62%	38%					
We sell our products or services outside of the county and in neighboring states	0	8								
We sell our products or services outside of the county and throughout the country	0	10								
We sell products or services outside the county	0	15								
We are in the travel and tourism sector and sell our products and services mostly to visitors	0	8								
Total Respondents	68	41	109							
(skipped this question)			0							
How many employees are currently in your company? (Please check the most applicable box.)										
	Local	% of Total	Export	% of Total						
Less than 5	28	28%	21	21%						
5 to 10	11	11%	6	6%						
10 to 25	10	10%	3	3%						
25 to 100	11	11%	5	5%						
More than 100	4	4%	2	2%						
Total Respondents	64		37	101						
(skipped this question)	4		4	8						

What is your current percentage of full-time employees working more than 35 hours per week? (Please check the most applicable box.)									
	Local	% of Total	Export	% of Total					
Less than 10%	11	11%	9	9%					
10% to 2%	8	8%	1	1%					
25% to 50%	1	1%	1	1%					
More than 50%	44	44%	26	26%					
Total Respondents	64		37	101					
(skipped this question)	4		4	8					
How many new jobs have been created in your company in the past year? (Please check the most applicable box.)									
	Local	% of Total	Export	% of Total					
Reduced employment	8	8%	6	6%					
Steady employment	30	30%	20	20%					
Less than 5	19	19%	4	4%					
5 to 10	2	2%	4	4%					
10 to 25	4	4%	1	1%					
25 to 100	1	1%	2	2%					
More than 100	0	0%	0	0%					
Total Respondents	64		37	101					
(skipped this question)	4		4	8					
Is your reduction of jobs expected to continue?									
	Local	% of Total	Export	% of Total					
Yes	0	0%	2	17%					
No	6	50%	4	33%					
Total Respondents	6		6	12					
(skipped this question)	62		35	97					

Is your growth expected to continue?				
	Local	% of Total	Export	% of Total
Yes, but at a decreased rate	6	17%	3	8%
Yes, at about the same rate	14	39%	5	14%
Yes, at an increased rate	2	6%	2	6%
No	4	11%	0	0%
Total Respondents	26		10	36
(skipped this question)	42		31	73
What type of training does your organization provide your employees? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Employee Reward	4	4%	2	2%
On-the-Job Training	44	45%	23	24%
Apprenticeships	8	8%	2	2%
On-site Classroom Training	48	49%	5	5%
Time for Off-site Training	27	28%	9	9%
Workshops/Seminars	33	34%	13	13%
None	11	11%	9	9%
Total Respondents	61		36	97
(skipped this question)	7		5	12
Has your company experienced difficulty in finding skilled employees within the last year?				
	Local	% of Total	Export	% of Total
Yes	23	24%	16	16%
No	38	39%	20	21%
Total Respondents	61		36	97
(skipped this question)	7		5	12

Have you been offered contracts that you have turned away because you did not have the employee capacity to meet the need within the past 12 months?										
	Local	% of Total	Export	% of Total						
Yes	10	10%	4	4%						
No	52	53%	33	33%						
Total Respondents	62		37	99						
(skipped this question)	6		4	10						
What is the biggest obstacle your business or organization faces over the next year (Check one)?										
	Local	% of Total	Export	% of Total						
Weak sales or revenues	17	17%	8	8%						
Availability/Cost of labor	6	6%	7	7%						
Availability/Cost of obtaining financing	4	4%	1	1%						
Regulatory/Legal obstacles	13	13%	0	0%						
Cost of materials/utilities (e.g. energy)	3	3%	4	4%						
Not applicable	19	19%	16	16%						
Total Respondents	62		36	98						
(skipped this question)	6		5	11						
There are enough skilled workers in the county to meet our needs.										
	Local	% of Total	Export	% of Total						
Strongly disagree	1	1%	6	7%						
Disagree	16	17%	13	14%						
Agree	37	40%	14	15%						
Strongly agree	3	3%	2	2%						
Total Respondents	57		35	92						
(skipped this question)	11		6	17						

There are enough administrative workers in the county to meet our needs.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	2	2%
Disagree	11	12%	10	11%
Agree	40	43%	20	22%
Strongly agree	6	7%	2	2%
Total Respondents	58		34	92
(skipped this question)	10		7	17
Workers generally have adequate technical skills to work in my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	3	3%
Disagree	19	21%	14	15%
Agree	38	42%	13	14%
Strongly agree	1	1%	2	2%
Total Respondents	59		32	91
(skipped this question)	9		9	18
Workers generally have adequate social skills to work in my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	3	3%	4	4%
Disagree	12	13%	5	5%
Agree	42	46%	21	23%
Strongly agree	1	1%	3	3%
Total Respondents	58		33	91
(skipped this question)	10		8	18

New workers generally have the basic language math and communications skills.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	3	3%
Disagree	10	11%	6	7%
Agree	40	46%	20	23%
Strongly agree	4	5%	3	3%
Total Respondents	55		32	87
(skipped this question)	13		9	22
Workers generally give my company "a good day's work."				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	6	7%	5	6%
Agree	41	47%	20	23%
Strongly agree	9	10%	7	8%
Total Respondents	56		32	88
(skipped this question)	12		9	21
Frequent absenteeism is an issue of concern for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	10	11%	7	8%
Disagree	37	42%	16	18%
Agree	5	6%	10	11%
Strongly agree	3	3%	0	0%
Total Respondents	55		33	88
(skipped this question)	13		8	21

The county's workforce is generally affordable (for wages and benefits).				
	Local	% of Total	Export	% of Total
Strongly disagree	1	1%	0	0%
Disagree	9	11%	7	8%
Agree	39	46%	25	30%
Strongly agree	3	4%	0	0%
Total Respondents	52		32	84
(skipped this question)	16		9	25
Wage and benefits costs in the county are:				
	Local	% of Total	Export	% of Total
Decreasing	3	4%	0	0%
Steady	14	17%	7	8%
Rising	37	45%	22	27%
Total Respondents	54		29	83
(skipped this question)	14		12	26
Though wage and benefits costs are rising I can still compete.				
	Local	% of Total	Export	% of Total
Strongly disagree	0	0%	1	2%
Disagree	8	13%	6	10%
Agree	29	46%	14	22%
Strongly agree	1	2%	4	6%
Total Respondents	38		25	63
(skipped this question)	30		16	46

Wage and benefits costs are rising everywhere not just in the county.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	1	2%
Disagree	1	2%	1	2%
Agree	33	53%	16	26%
Strongly agree	4	6%	6	10%
Total Respondents	38		24	62
(skipped this question)	30		17	47
Wage and benefits costs are rising faster in the county than elsewhere.				
	Expert	% of Total	Export	% of Total
Strongly disagree	0	0%	0	0%
Disagree	26	45%	15	26%
Agree	8	14%	6	10%
Strongly agree	2	3%	1	2%
Total Respondents	36		22	58
(skipped this question)	32		19	51
Wage and benefits costs are too high and are a competitive disadvantage for my company.				
	Local	% of Total	Export	% of Total
Strongly disagree	1	2%	0	0%
Disagree	24	41%	12	21%
Agree	11	19%	8	14%
Strongly agree	1	2%	1	2%
Total Respondents	37		21	58
(skipped this question)	31		20	51

How would your company rate the ability to obtain debt financing (e.g. a bank loan) at reasonable terms in the county (Check one)?										
	Local	% of Total	Export	% of Total						
Very difficult	1	1%	0	0%						
Difficult	4	5%	8	9%						
Average	22	26%	9	10%						
Easy	8	9%	4	5%						
Very easy	6	7%	5	6%						
Not applicable	14	16%	5	6%						
Total Respondents	55		31	86						
(skipped this question)	13		10	23						
How would your company or organization rate the ability to obtain equity financing (e.g. venture capital or other loans in exchange for an ownership stake) at reasonable terms in the county (Check one)?										
	Local	% of Total	Export	% of Total						
Very difficult	4	5%	2	2%						
Difficult	10	12%	8	10%						
Average	8	10%	6	7%						
Easy	4	5%	1	1%						
Very easy	4	5%	0	0%						
Not applicable	24	29%	13	15%						
Total Respondents	54		30	84						
(skipped this question)	14		11	25						
Please indicate your experience with the following types of financing over the past 3 years:										
Local	Obtained	Denied	Will need	N/A	Export	Obtained	Denied	Will need	N/A	
Working Capital	17	2	2	31	Working	11	2	3	14	
Equipment Loan	15	0	1	34	Equipme	8	1	4	14	
Commercial Mortgage	14	0	1	35	Commer	7	1	3	16	
Second Mortgage	8	0	0	41	Second M	7	1	0	20	
Total Respondents	85									
(skipped this question)	24									

Does any of your current debt (mortgage second mortgage) come due within the next 3 years?										
	Local	% of Total	Export	% of Total						
Yes	9	10%	6	7%						
No	16	19%	13	15%						
N/A	30	35%	12	14%						
Total Respondents	55		31	86						
(skipped this question)	13		10	23						
Please indicate the method(s) used for obtaining capital for your business within the past 3 years:										
	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 yrs		Export	Obtained for start-up	Obtained for expansion	Denied	Will need within the next 3 yrs
Local						Export				
Public sector grants-financial (e.g. tax	4	4	2	4		Public se	1	3	1	1
Outside investors	5	4	0	2		Outside i	1	1	1	2
Self-funded/organic growth	15	18	0	1		Self-fund	6	8	0	1
Sweat equity	8	12	0	1		Sweat ec	6	8	0	1
Bank loan	3	16	0	2		Bank loa	2	11	0	3
Total Respondents	64									
(skipped this question)	45									
To what extent are the natural resources of the county important to your business?										
	Local	% of Total	Export	% of Total						
To no extent	11	13%	14	16%						
To a small extent	9	11%	6	7%						
To a moderate extent	16	19%	1	1%						
To a great extent	12	14%	5	6%						
To a very great extent	6	7%	5	6%						
Total Respondents	54		31	85						
(skipped this question)	14		10	24						

How are the county's natural resources and/or natural beauty (e.g. for outdoor recreation) of the county used in your business?									
	Local	% of Total	Export	% of Total					
Directly in the production of my comp	4	5%	1	1%					
Directly for attracting customers (e.g.	13	15%	5	6%					
Indirectly to attract and maintain a hig	7	8%	5	6%					
Indirectly because it is important for re	4	5%	1	1%					
This is not applicable to my business	25	30%	19	23%					
Total Respondents	53		31	84					
(skipped this question)	15		10	25					
My company's access to the following services in the county is:									
<b>Local</b>	Acceptable	Unaccepta			<b>Export</b>	Acceptat	Unacceptable		
Surface transportation (e.g. rail roads)	39	9			Surface t	21	5		
Reliable air transportation	32	13			Reliable	18	8		
Water (Drinking and processing)	45	5			Water (D	23	3		
Wastewater treatment (Sewer)	38	11			Wastewa	19	4		
Wastewater treatment (Septic)	34	9			Wastewa	21	3		
Employee housing	18	27			Employe	14	9		
Reliable electric (other) power	46	5			Reliable	21	3		
Solid waste management services	13	3			Solid was	20	4		
Industrial Space/Sites	26	16			Industria	16	6		
Incubator space	29	10			Incubato	13	4		
Total Respondents	78								
(skipped this question)	31								

My company's costs for the following services in the county are:										
<b>Local</b>					<b>Export</b>					
	Affordable	Not Affordable			Affordable	Not Affordable				
Surface transportation (e.g. rail roads)	41	4			Surface t	22	1			
Reliable air transportation	33	10			Reliable	17	4			
Water (Drinking and processing)	38	5			Water (D	20	2			
Wastewater treatment (Sewer)	35	7			Wastewa	15	4			
Wastewater treatment (Septic)	33	3			Wastewa	17	2			
Employee housing	13	28			Employee	5	11			
Reliable electric (other) power	38	9			Reliable	15	6			
Solid waste management services	35	3			Solid wa	16	3			
Industrial Space/Sites	27	8			Industria	11	5			
Incubator space	24	7			Incubato	8	3			
Total Respondents	75									
(skipped this question)	34									
The quality my company receives from the following county services is:										
<b>Local</b>					<b>Export</b>					
	Very poor	Poor	Good	Very good	Very poor	Poor	Good	Very good		
Surface transportation (e.g. rail roads)	0	5	32	5	Surface t	0	3	18	2	
Reliable air transportation	3	9	22	0	Reliable	1	7	12	0	
Water (Drinking and processing)	2	5	24	14	Water (D	0	2	18	2	
Wastewater treatment (Sewer)	4	6	24	6	Wastewa	0	2	14	3	
Wastewater treatment (Septic)	2	6	31	5	Wastewa	1	0	14	2	
Employee housing	2	16	16	0	Employee	2	7	5	0	
Reliable electric (other) power	0	6	26	9	Reliable	0	2	15	4	
Solid waste management services	4	4	28	5	Solid wa	0	4	14	2	
Industrial Space/Sites	2	8	20	0	Industria	1	2	11	1	
Incubator space	1	7	20	2	Incubato	0	4	10	0	
Total Respondents	74									
(skipped this question)	35									
Does your company use the Internet to:										
<b>Local</b>					<b>Export</b>					
	Yes	No	N/A		Yes	No	N/A			
Advertise find customers or find workers?	42	5	4		Advertise	24	4	3		
Take orders and/or display your products and services?	35	10	6		Take ord	27	2	1		
Total Respondents	83									
(skipped this question)	26									

To what extent are the following important to your business?										
	no extent	small extent	moderate extent	great extent	very great extent	Export no extent	Export small extent	Export moderate extent	Export great extent	Export very great extent
<b>Local</b>										
Affordable telecommunications services	0	3	17	13	19	1	0	5	7	17
Higher education institutions for research or business education/worker training	3	9	16	12	8	5	3	13	4	5
Affordable technical education	8	4	18	9	10	4	6	13	3	3
Affordable non-degree technical training (e.g. seminars/workshops)	5	6	21	9	8	4	7	9	5	2
Affordable research and development or laboratory services	19	11	9	5	2	14	7	2	3	2
Affordable technology transfer services	15	8	13	6	5	7	8	5	3	4
Total Respondents	83									
(skipped this question)	26									
Which of the following graduates does/would your company consider hiring? (Select all that apply.)										
	Local	% of Total	Export	% of Total						
High School	28	36%	13	17%						
2-Year College	31	40%	22	29%						
4-Year College	44	57%	23	30%						
Other (please specify)	8	10%	8	10%						
Total Respondents	77									
(skipped this question)	32									
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>							
1	Masters D	1	advanced Phd degrees							
2	Technical	2	years of professional service equivalents							
3	MDs	3	post grad							
4	trade scho	4	not applicable							
5	MBA	5	skilled craftspeople							
6	Must be in	6	All of the above							
7	manuel de	7	Graduate students							
8	Masters D	8	LICENSED CAPT.							

How would you rate your company's access to the following County's institutional resources?						
Local	Acceptable	Not acceptable			Export	Acceptable Not Acceptable
K-12 schools	37	4			K-12 schools	14 4
Health care	31	16			Health care	17 8
Cultural resources (e.g. the arts)	42	5			Cultural resources	22 0
Recreational services	44	3			Recreational services	20 2
Religious or spiritual resources	41	2			Religious or spiritual resources	17 0
Social services	40	3			Social services	14 2
State government services	33	9			State government services	13 5
County government services	37	6			County government services	14 6
Local government services	36	9			Export government services	13 6
Services to help grow my business	34	9			Services to help grow my business	11 8
Total Respondents	77					
(skipped this question)	32					
How would you rate the quality of services your company receives from the following County institutional resources?						
Local	Acceptable	Not Acceptable			Export	Acceptable Not Acceptable
K-12 schools	31	6			K-12 schools	13 5
Health care	27	13			Health care	17 8
Cultural resources (e.g. the arts)	39	2			Cultural resources	22 0
Recreational services	36	4			Recreational services	20 2
Religious or spiritual resources	36	2			Religious or spiritual resources	17 0
Social services	35	3			Social services	14 2
State government services	27	8			State government services	13 5
County government services	30	9			County government services	14 6
Local government services	27	11			Export government services	13 6
Services to help grow my business	30	12			Services to help grow my business	11 8
Total Respondents	71					
(skipped this question)	38					
How would you rate the affordability or competitiveness for the following County institutional resources?						
Local	Acceptable	Not Acceptable			Export	Acceptable Not Acceptable
K-12 schools	22	19			K-12 schools	12 6
Health care	18	26			Health care	9 15
Cultural resources (e.g. the arts)	36	7			Cultural resources	21 0
Recreational services	39	5			Recreational services	18 1
Religious or spiritual resources	38	2			Religious or spiritual resources	18 0
Social services	29	10			Social services	15 1
State government services	21	18			State government services	12 5
County government services	22	18			County government services	12 5

Local government services	22	17			Export goods	14	4		
Services to help grow my business	28	12			Services	10	8		
Total Respondents	74								
(skipped this question)	35								
The local review development climate in the county is:									
	Local	% of Total	Export	% of Total					
Very predictable	5	6%	1	1%					
Somewhat predictable	18	23%	8	10%					
Unpredictable	18	23%	9	12%					
Don't know	9	12%	9	12%					
Total Respondents	50		27	77					
(skipped this question)	18		14	32					
To what extent are maintenance and improvement in the County's "quality of life" important to your business?									
	Local	% of Total	Export	% of Total					
To no extent	3	4%	1	1%					
To a small extent	6	8%	2	3%					
To a moderate extent	8	10%	13	16%					
To a great extent	21	26%	6	8%					
To a very great extent	13	16%	7	9%					
Total Respondents	51		29	80					
(skipped this question)	17		12	29					
If you have faced obstacles to investing and/or growing your business in the county over the last year what steps might UCDC or governmental agencies do to help your company succeed in Ulster County?									
<b>Open ended responses</b>	Local		Export	Total					
Total Respondents	25		14	39					
(skipped this question)	43		27	70					
<b>See Appendix F, Part 4</b>									

How do you expect overall business conditions to change over the 12 months?				
	Local	% of Total	Export	% of Total
Significant worsening	1	1%	1	1%
Modest worsening	18	23%	9	12%
No change	14	18%	9	12%
Modest improvement	13	17%	8	10%
Significant improvement	1	1%	3	4%
Total Respondents	47		30	77
(skipped this question)	21		11	32
Is your company or organization investing in new equipment or software over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	1	1%	0	0%
Modest reductions are being made or	1	1%	0	0%
No change	16	20%	9	11%
Modest investments are being made	28	35%	15	19%
Significant investments are being made	3	4%	6	8%
Total Respondents	49		30	79
(skipped this question)	19		11	30
Is your company or organization investing in new office or other space over the 12 months?				
	Local	% of Total	Export	% of Total
Significant reductions are being made	0	0%	1	1%
Modest reductions are being made or	0	0%	0	0%
No change	32	41%	19	24%
Modest investments are being made	10	13%	4	5%
Significant investments are being made	6	8%	6	8%
Total Respondents	48		30	78
(skipped this question)	20		11	31

What attracted your company to locate in Ulster County? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Affordable location	13	17%	13	17%
Available talent	4	5%	4	5%
Tax incentives	3	4%	1	1%
Available customer base	15	19%	4	5%
Available suppliers	0	0%	0	0%
Infrastructure	2	3%	1	1%
Business network	8	10%	2	3%
Potential growth	15	19%	4	5%
Lack of competition	7	9%	1	1%
Quality of life	19	24%	16	21%
Original founder lives(d) here	27	35%	15	19%
Other (please specify)	9	12%	8	10%
Total Respondents	78			
(skipped this question)	31			
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>	
1	family		1	live here
2	the location is the reason		2	this is the only place to do what I do
3	In Dutchess County		3	Acquisition was available
4	proximity to family members		4	Environment, Catskill Mtns
5	formed in conjunction with IBM		5	I live here and love the County
6	Home business, ex IBM		6	family and beauty of location
7	We are not located in Ulster-we work with U		7	I live here
8	Grew up here		8	HUDSON RIVER
9	We were very young at the time we purchased and restored our building, at the time we had nothing to loose and everything to gain.			

What keeps your company in Ulster County? (Select all that apply.)									
	Local	% of Total	Export	% of Total					
Affordable location	13	17%	11	15%					
Available talent	4	5%	3	4%					
Tax incentives	3	4%	1	1%					
Available customer base	18	24%	5	7%					
Available suppliers	2	3%	0	0%					
Infrastructure	3	4%	5	7%					
Business network	15	20%	3	4%					
Potential growth	23	31%	6	8%					
Lack of competition	7	9%	3	4%					
Quality of life	20	27%	18	24%					
Original founder lives(d) here	24	32%	13	17%					
Other (please specify)	4	5%	6	8%					
Total Respondents	75		1						
(skipped this question)	34		10						
	<i>Other Responses - Local</i>				<i>Other Responses - Export</i>				
	1	Mandated jurisdiction/ Question N/A			1	live here			
	2	location			2	Acquired business here			
	3	Chartered to serve area			3	I live here and love the County			
	4	Building, cannot be re-produced			4	family and beauty of location			
					5	I live here			
					6	26 YRS OF WORKING HERE			

Which of the following resources in Ulster County does your business use? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Hudson Valley Center For Innovation	4	8%	4	8%
Kingston-Ulster Empire Zone	16	31%	5	10%
Mid Hudson Small Business Developr	12	24%	3	6%
Ulster County Development Corporati	16	31%	4	8%
Ulster County Industrial Development	9	18%	1	2%
Ulster County Office of Employment a	10	20%	1	2%
Ulster County Tourism Department	6	12%	3	6%
Other (please specify)	7	14%	7	14%
Total Respondents	51			
(skipped this question)	58			
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>	
1	none			1 None currently
2	I didn't know about some of these resources			2 none of the above
3	One Stop			3 no contact with above
4	planning dept			4 CofC
5	Ulster County Chamber of Commerce			5 Chamber
6	New Paltz Cmanber of commerce			6 Ulster Chamber of Commerce
7	Ulster Chamber of Commerce			7 TRADE GROUPS
Which of the following resources outside of Ulster County does your business use? (Select all that apply.)				
	Local	% of Total	Export	% of Total
Catskill Watershed Corporation	4	15%	0	0%
Empire State Development Corporatic	12	46%	3	12%
Hudson Valley Economic Developmer	7	27%	1	4%
Hudson Valley Technology Developm	3	12%	1	4%
Other (please specify)	4	15%	5	19%
Total Respondents	26			
(skipped this question)	83			
	<i>Other Responses - Local</i>		<i>Other Responses - Export</i>	
1	NYBDC			DASNY, NY Office of Court Administration, word of mouth
2	none			2 no contact with above
3	Dutchess County IDA, EDZ			3 SBA
4	other county Chambers of Com			4 NYBDC
				5 TOURISM DEPT

## Appendix B: Resource Assessment Survey Data – Open-Ended Responses

### Open-Ended Responses to Resource Survey Question #47

*Please note that the responses to question 47 appear exactly as they were recorded by the respondent to maintain accuracy and integrity of the data, and therefore may contain irregularities in spelling and grammar*

47. If you have faced obstacles to investing and/or growing your business in the County over the last year what steps might UCDC or governmental agencies do to help your company succeed in Ulster County?

#### Targeted Local Responses

1	Market MD and Hospital Resources.
2	I have never sought venture capital assistance or applied for a business grant and do not know how to. I would like assistance with this or a seminar about this.
3	To streamline the approval processes for development projects. To help the County be less adversarial to customers & entrepreneurs. To educate local gov't's re the planning & approval processes. To help local gov't's & the County invest in infrastructure in the area: roads, signage, water & sewer capacity, landscaping, parks, anything.
4	The major obstacle is that many are not aware of the services of the UCDC. The UCDC should establish a better working liaison with the SBDC and SCORE as well as with the local professional groups, ie AMA- medical professional to make them aware of the financial services that could be utilized to build and develop medical complexes. Suffolk County used their Bi County Development Prgms to attract and finance professionals- and to build and develop busines condo financing for professional. Our major problem is that too many of the local County Legislators have no idea what the UCDC and IDA are attempting to do and have continued to interfere and dilute the programs that have been successful. As a financial advisor, I would recommend that financing small business should be a major component and primary goal of the UCDC. The problem is that the Legislators dont appear to realize this and have stepped into the business of the UCDC
5	provincial mentality; reactive rather than progressive
6	I place mentally and physically disabled individuals in jobs. One of the largest problems is transportation -- people in rural areas being able to get to work when they have no reliable transportation. Developing a more comprehensive transportation system would help.
7	help by placing all age children that we are liscensed for before filling new daycares.
8	Needs an active dynamic tourism expansion plan. The current economic climate is not conducive to encouraging tourism to the point where it can make a difference.
9	locating suitable tenants for our rental spaces
10	Streamline approval processes and raise tax ratables
11	Get the City of New York and the Catskill Watershed Corporation to invest money and spend it on sustainable economic development initiatives in the Watershed
12	expand the scope of the EDZ criteria, incentives, and guidelines reduce taxes create real public transit that is a 'deep intermodal network' invest in and promote work force and senior housing

13	operational support for non profit agencies who are not now government supported but add greatly to the quality of life in the area.
14	Ulster County must be promoted as a 'Tourist Destination' The lack of industry mandates that we place the greatest importance on seeking a continual tourism population. Additionally, our schools must be improved in order to draw young couples with school age children to the area. There must also be substantial tax credits for companies to be drawn to Ulster County. Development cannot take a back seat to the 'status quo'.
15	My business is dedicated to building the capacity of nonprofits. Such organizations in Ulster County are frequently in need of the services I provide, but are financially unable to pay for them. UCDC could help by focusing more attention on the nonprofits of all sizes, and drawing attention and support to them from both the private and government sectors. Nonprofits provide significant programs and services that improve the quality of life in Ulster County for all residents and visitors.
16	Give Pilot to Adult Care Homes to afford the local taxes. Loan grant money with a lot less restrictions.
17	The Ulster County Health Department (with the exception of Corey) is a disaster. They were not helpful in getting our business started. More help from the UCDC is how the Pilot program works with the paperwork that needs to be turned in. Local Planning Boards need to encourage businesses not make life more difficult for future business owners.

**Targeted Export Responses**

1	The local businesses do not work to help each other and the local Chamber of Commerce does so on the surface only. There is no real commerce-to-commerce cross marketing in our community.
2	So far my experience with the Mayor of Kingston's office has been outstanding. I have had little or no dealings with Ulster County. I am not really sure how all of the organizations interact. I was a little put off my an Ulster County Small Business Loan Meeting, where Bankers did the presentation and clearly used the meeting as a way of bringing in business. This was not reassuring.
3	Affordable health care insurance; affordable electricity and energy; seminar programs in how small business can compete with multi-national corporations; Job retention programs that reward companies for not outsourcing jobs to foreign countries.
4	Not enough technology trade shows, i.e. networking
5	I have provided facilities planning for other town and County entities with a 100% success and satisfaction rate for over 40 years. However, I find that approaching Ulster County or towns within this County is next to impossible without a 'political' backing. Fortunately my reputation as an architectural facility planner throughout NY and nearby states provides unsolicited project awards for nearby town and County municipal facilities. Specifically, Suffolk, Clinton, Bronx Counties and towns of Hyde Park, Amityville, Hempstead, Clinton, Stanford, and several more. I know that my services are very much needed here but obtaining work here is next to impossible.
6	Get the Federal Government to float the US\$ against the Yen, Chinese Currency, Euro and our export business will pick up again. USA Exports are too expensive - no one wants to purchase.
7	Give small businesses some resources, care about us. We too want to hire employees, but cannot afford them, forcing us to go under or overwork. I have NO access to any type of funding in this County. My bank, chosen BECAUSE it was a local bank, does not care

	one bit about me. It is so difficult trying to be an entrepreneur in this County.
8	Ease in obtaining 'growth' grants/low-interest loans..our business is growing fast..our current capital funds have a hard time keeping up... also need help financing a new location.
9	Reduce Property Taxes For Business.
10	assist in the identification and acquisition of investment capital
11	We brought our business to Ulster in 1995. Since then for the core business and another that was started and closed, the only source of investment [and, I hope I am understanding the question here] has been banks. Thus for a micro business it was the process of driving business through 'sweat equity' and leveraging credit cards. Once the run rate became more robust and a series of P&L's and balance sheets could be produced, bank financing was possible: term loans and line-of-credit. Now after 10 years here, I do not know how to raise capital for growth. The Hudson Valley Center for Innovation (HVCFI) is a positive step. It is tuned to digital technology companies, not service firms like ours. I think that UCDC could (and don't think government agencies could or should) consider the encouragement and development of micro business investment capital. This would require an investment bank mentality coupled to a tutorial capability. The UCDC might develop an approach where it could bring together private risk capital (identified through CPA's and financial advisors) to support new enterprise. Perhaps a vetting process would be needed. On the consumer front, population growth alone will drive consumption.
12	Provide improved telecommunications in the area
13	marketing and ads to promote tourism for all 4 seasons. we have a jewel here and its the best kept secret in the state. Tourism should be given more credit due to the ripple effect it creates to the economy.

**Web Local Responses**

1	N/A
2	We need to target how to lower the Real estate tax burden placed on properties in the County with specific attention to the City of Kingston.
3	PROMOTE/ENCOURAGE MORE SHARING OF SERVICES/CONSOLIDATION AMONG/BETWEEN GOVERNMENTAL ENTITIES/MUNICIPALITIES IN AN IMPROVED EFFORT TO SLOW THE PACE OF GROWTH OF 'GOVERNMENT' AND TAXES
4	Stop the rate of tax increases, get some government agencies/muni's to merge. Get a game plan in place for what we want where. Tch City is not going away, we must engage the owner and help him make the site productive again.
5	Make it easier to obtain the necessary permits
6	Crete better awareness of Pro business programs available
7	We generally run our business as government contractors. Historically, most of our business was supported by federal work, but the political climate cut funding for energy-efficiency work, so we are now relying heavily on winning contracts for NY State work. We offer consulting services for energy-efficiency technologies in buildings and transportation. Pretty much any support or investment in the growth of the energy efficiency, alternative energy, and smart growth sector would improve our chances of staying in Ulster County.
8	I could use lists of specific resources to choose from. Reports that tell me how my business is doing would be helpful. For example if my business is down 10%, are other business in my sector down.level or growing. Economic studies specific to my town (Woodstock), the

	<p>County and the region would be helpful. Assuming they exist, emails letting me know what's available as soon as they come out. Everything online would be great. 9 to 5 services are often difficult because my business needs my attention 9 to 5. Thanks for asking.</p>
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**Web Export Responses**

<p>1</p>	<p>Have faced a difficult shortage of high skilled technical workers. Also have experienced unwarranted local opposition to expanding a friend's local manufacturing business. Finally have failed to hire key skilled employees from outside the region due to lack of quality housing and high school taxes.</p>
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## Appendix C: Roles and Responsibility Matrix

	<b>Catskill Watershed Corporation</b>	<b>Chamber of Commerce Ulster County</b>	<b>Empire State Development Corporation</b>	<b>Environmental Facilities Corporation</b>	<b>Hudson Valley Center for Innovation</b>	<b>Hudson Valley Economic Development Corporation</b>
<b>Mission/ Function</b>	offset the costs and restrictions of increased regulations and land purchases by the city	business-advocacy	New York State's lead economic development agency	provide low-cost capital and expert technical assistance to municipalities, businesses and State agencies for environmental projects and envs reg compliance	grow and develop emerging high value business and tech development firms/creation of high-value jobs through business incubation model	marketing buildings and sites identified for development or redevelopment
<b>Major Programs/ Initiatives</b>	Catskill Fund for the Future Loans, micro-loans and grants to support environmentally responsible business, and create/retain jobs Small Business Development Outreach Center Catskill Business Roundtable	SCORE OJT Training Program Business development promotion to elected officials Ulster County Tourism Promotion	Empire Zones Tax Incentives Discounted Loans, Bonds	Financing and technical assistance for municipalities, large and small business, and job creation efforts NY Beginner Farmer Loan Program	Mentoring services	\$7.5 million marketing initiative for a nine-county region Target industries: o Semiconductor and microelectronics o Biotech and pharmaceutical o Information technology o Finance & insurance
<b>Collaborations</b>	Small Business Development Center CWC REDI Loan Fund can be accessed through UCDC	UCDC local SCORE Chapter #533 OJT partly funded by UCWIB	UCDC provides access to K/U Empire Zone benefits and incentives	NY Dept. of Agriculture and Markets	UCDC HVTDC	Point of entry for Empire Zone Incentives
<b>Limits to Collaboration in Bylaws?</b>	None	No Data Available	No Data Available	None	None	None
<b># of Staff</b>	16	5?	No Data Available	140	2 regular staff 5 mentors	4 Staff 1 Temp
<b># of Board Members</b>	15	21	No Data Available	10	9	16
<b>Funding Sources</b>	NYC - water usage / rate payers	dues	No Data Available	Fed. Grants State funding match investment returns	33% State 33% Federal 33% Fees	Central Hudson Counties Other Utilities State of NY Private Contrib.
<b>Offices</b>	Margaretville	Kingston	Co-HQ -Albany & NYC 18 offices world wide	Albany	Lake Katrine	New Windsor
<b>Region of Influence (at least)</b>	New York State, west of the Hudson River	Ulster County	State of New York	State of New York	Counties of Ulster, Sullivan, Orane, Putnam, Dutchess, Rockland, Westchester	Counties of Ulster, Sullivan, Orane, Putnam, Dutchess, Rockland, Westchester, Columbia, Greene

	<b>Hudson Valley Technology Development Center</b>	<b>Kingston Ulster Empire Zone</b>	<b>Mid-Hudson Region Small Business Development Center</b>	<b>New York Business Development Corporation</b>	<b>New York State Energy Research and Development Authority</b>	<b>New York State Office of Science, Technology and Academic Research</b>
<b>Mission/ Function</b>	helps small to medium-sized manufacturers, businesses, inventors, and entrepreneurs become more competitive; primarily a consulting entity	create and retain jobs and induce investment in properties within the Zone	business counseling and training	promote economic activity within New York state by providing innovative loans and credit opportunities	administers the New York Energy SmartSM program designed to support certain public benefit programs during the transition to a more competitive electricity market	growing leadership position in high technology research and economic development; recognition that NYS's public/private research universities and academic centers can be economic development engines
<b>Major Programs/ Initiatives</b>	Business consulting Technology & Entrepreneurial Assistance Program Funding assistance with NYS Environmental Investment Program & NYS Industrial Effectiveness Program; NYSERDA programs WIB programs Free business expert speaker	Tax Credits Real Property Tax Abatement Sales Tax Refund (building materials) Sales Tax Exemption Zone Capital Credits SZCC	Consulting free of charge to New York businesses	Lending for businesses that may not qualify for traditional financing	Projects that fit into the scope of funding and program offerings Technical and financial assistance to companies concerned about energy and environmental efficiency	8 Strategically Targeted Academic Research (STAR) Centers 5 Advanced Research Centers (ARC), 15 Centers for Advanced Technology (CAT) 2 College Applied Research and Technology (CART) centers 10 Regional Technology Development Centers (RTDCs)
<b>Collaborations</b>	NYSTAR®'s designated RTDC for the Hudson Valley UCDC (to develop Hudson Valley Center for Innovation)	UCDC	Ulster County Red Carpet Business Services Team administered by SUNY	UCDC	ESDC Red Carpet Business Services Team	HVTDC is local RTDC Business Res. Center is local incubator
<b>Limits to Collaboration in Bylaws?</b>	TBD	None	No Data Available	None	No Data	None
<b># of Staff</b>	12	1	8	54	No Data Available	25
<b># of Board Members</b>	12	15	None	29	12	13
<b>Funding Sources</b>	NYSTAR NIST MEP US Dept. of Commerce	State of NY Kingston Town of Ulster	US SBA	Retirement funding program workers pension fund SPA 504 Program	electricity transmitted and distributed by the State's investor-owned utilities	NYS Appropriations, Federal funds Assets in Small Business Technology Investment Fund
<b>Offices</b>	Fishkill	Kingston	HQ - Kingston Outreach - Fishkill, New Windsor, Monticello, Poughkeepsie, Margaretville	Albany	HQ - Albany Regional offices- Buffalo NYC	Albany
<b>Region of Influence (at least)</b>	Hudson Valley	Kingston Ulster Saugerties Wawarsing	Counties of Dutchess, Orange, Schoharie, Ulster, Greene, Delaware, Sullivan	State of New York	State of New York	State of New York

	<b>Rural Ulster Preservation Company</b>	<b>Ulster County Development Corporation</b>	<b>Ulster County Industrial Development Agency</b>	<b>Ulster County Workforce Development System</b>
<b>Mission/ Function</b>	creates housing opportunities for low and moderate income households	Ulster county's lead economic development agency	advance the job opportunities and long-term economic vitality by targeting assistance to create, attract, retain, or expand existing business	meeting the employment needs of job seekers, current workers and businesses
<b>Major Programs/ Initiatives</b>	Real Estate Development Property Management Owner Occupied and Rental Rehab NeighborWorks® HomeOwnership Center Counseling, Technical, & Emergency Assistance	Development 21 Initiative o Shovel Ready Fund o Telecommunications Fund K/U Empire Zone UCIDA Access Revolving Loan Funds Business Development Programs One-stop ED Services	Taxable and tax-exempt industrial development revenue bonds	One-Stop Job Center Ulster County Red Carpet Business Services Team Job Seeker services
<b>Collaborations</b>	Housing Consortium	UCIDA K/U Empire Zone WDS Chamber of Commerce Ulster Housing Consortium WDS Red Carpet NYBDC	Chamber of Commerce of Ulster County UCDC Ulster County Planning Department	UCDC Chamber of Commerce Ulster K/U Zone SBDC NYSERDA
<b>Limits to Collaboration in Bylaws?</b>	conflicts of interest must be disclosed	12 specific public sector offices-holders to be on board "To the extent possible"	None	None
<b># of Staff</b>	27	5	contracted through UCDC	10
<b># of Board Members</b>	9	31		35
<b>Funding Sources</b>	NeighborWorks America HUD NYS Dept. of Housing	Annual county grant administrative fees private sector contributions	Administrative fees for projects	WIA Title 1 TANF (summer youth program)
<b>Offices</b>	Kingston	Kingston	Kingston	Kingston
<b>Region of Influence (at least)</b>	Ulster County	Ulster County	Ulster County	Ulster County

## Catskill Watershed Corporation



### **Mission/Function**

The CWC was born Jan. 17, 1997 with the signing of the landmark New York City Watershed Memorandum of Agreement between city, state, federal and environmental entities, and local municipalities. To help offset the costs and restrictions of increased regulations and land purchases by the city, the CWC was charged with developing and implementing several city-funded programs, including residential septic rehabilitation, economic development, education, storm water controls and salt storage improvements.<sup>19</sup>

### **Economic Development Programs & Initiatives**

- Catskill Fund for the Future (revolving loan)
- Loans, micro-loans and grants to support environmentally responsible business, and create/retain jobs
- Small Business Development Outreach Center (consulting center/library)
- Catskill Business Roundtable (One-stop shop directory for assistance, marketing plan, technology)

### **Ulster County Collaborations**

Catskill Fund for the Future revolving funds are for the purposes of economic development with an environmental and/or watershed focus. The Catskill Business Roundtable One-stop shop directory provides a similar service to UCDC's comprehensive one-stop services. The Catskill Fund for the Future was created specifically by a NYC appropriation for the purposes of delivering on the CWC mission. The Catskill Business Roundtable has a broader geographic focus than Ulster County.

**Region of Influence:** New York State, west of the Hudson River

**Website:** <http://www.cwconline.org/>

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<sup>19</sup> Retrieved from [http://www.cwconline.org/about/ab\\_index.html](http://www.cwconline.org/about/ab_index.html) on 2/7/07

## Chamber of Commerce Ulster County



### Mission/Function

The Chamber of Commerce of Ulster County is a not-for-profit membership corporation that provides services and advocacy on behalf of its membership and the community at large to advance the economic health and vitality of Ulster County. The Chamber is a leader on issues of economic development, business retention, tourism promotion and the community. The Chamber provides their members with services to help them grow through the expertise of staff, board members, and affiliations with professional organizations including: Chamber Alliance of New York State, The Business Council of New York State, Inc., The United States Chamber of Commerce, and the American Chamber of Commerce Executives. They are the largest business-advocacy organization in Ulster County, supported by an active and involved business community, with a membership of 1,300.<sup>20</sup>

### Economic Development Programs & Initiatives

- SCORE (Service Corp of Retired Executives), Counselors to America's Small Business
- Chamber's On-the-Job Training Program (OJT)
- Business development promotion to elected officials
- Business referrals, Networking Events
- Ulster County Tourism Promotion, including annual Membership Directory, Quality of Life Guide, and video presentation
- Promotion and links to other economic development organizations related to Ulster County

### Ulster County Collaborations

Chamber of Commerce Ulster County is a UCDC partner, and the Chamber explicitly credits them for the growth and stability of industry within Ulster County in the *Economic Development* page of their website. The local SCORE Chapter #533 is partly sponsored by the Chamber and provides free business counseling. The Chamber's OJT was established in 1968, and assists local employers with obtaining and training qualified employees while providing job opportunities and practical on-the-job training for individuals. The program is funded by the Chamber and the Ulster County Work Force Investment Board.

**Region of Influence:** Ulster County

**Website:** <http://www.ulsterchamber.org/>

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<sup>20</sup> Retrieved from <http://www.ulsterchamber.org/index.shtml> on 2/7/07

## Empire State Development Corporation



### **Mission/Function**

Empire State Development (ESD) is New York State's lead economic development agency. The organization, with co-headquarters in Albany and New York City, is supported by a network of 18 additional ESD Offices throughout the state and around the world.

Their mission is to provide the highest level of assistance and service to businesses in order to encourage economic investment and prosperity in New York State. They work closely with businesses to: identify creative solutions to challenging problems, generate enhanced opportunities for growth, and help them achieve their uniquely important, short- and long-term goals.<sup>21</sup>

### **Economic Development Programs & Initiatives**

- Empire Zones
- Tax Incentives
- Discounted Loans, Bonds
- as the State of New York's major economic development organization, ESD offers a full menu of economic development programs

### **Ulster County Collaborations**

UCDC works in partnership with ESD to provide a point of entry for the Kingston/Ulster Empire Zone.

**Region of Influence:** State of New York

**Website:** <http://www.empire.state.ny.us/>

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<sup>21</sup> Retrieved from [http://www.empire.state.ny.us/Contacts\\_and\\_About\\_Us/default.asp](http://www.empire.state.ny.us/Contacts_and_About_Us/default.asp) on 2/7/07

## Environmental Facilities Corporation



### **Mission/Function**

The Environmental Facilities Corporation's mission is to promote environmental quality by providing low-cost capital and expert technical assistance to municipalities, businesses and State agencies for environmental projects in New York State. Its purpose is to help public and private entities comply with federal and State environmental requirements.<sup>22</sup>

### **Economic Development Programs & Initiatives**

- The EFC offers financing and technical assistance for municipalities, large and small business, and job creation efforts which are primarily for environmental standards compliance or related to water facilities
- NY Beginner Farmer Loan Program offers low interest loans for beginner farmer start-up costs

### **Ulster County Collaborations**

NY Beginner Farmer Loan Program could benefit Ulster County residents. The New York Beginner Farmer Loan Program is administered by EFC in partnership with the NY Dept. of Agriculture and Markets. There is little evidence of a concerted collaborative effort between Ulster County agencies and the EFC to leverage the NY Beginner Farmer Loan Program in Ulster County.

**Region of Influence:** State of New York

**Website:** <http://www.nysefc.org/home/index.asp>

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<sup>22</sup> Retrieved from <http://www.nysefc.org/home/index.asp?page=2> on 2/7/07

## Hudson Valley Center for Innovation



### **Mission/Function**

The Hudson Valley Center for Innovation, Inc. (HVCFI) is a not-for-profit corporation formed to foster the growth and development of emerging high value business and technology development firms, and the creation of high-value jobs throughout the Hudson Valley region of New York State through the implementation, and enhancement, of the cost-effective business incubation model. Headquartered in the Hudson Valley Business Center in Kingston, New York, HVCFI's ambition is to establish both physical and virtual satellite facilities throughout the Hudson Valley concentrating on: Ulster, Sullivan, Orange, Putnam, Dutchess, Rockland and Westchester Counties.<sup>23</sup>

### **Economic Development Programs & Initiatives**

- HVCFI is a not-for-profit business development facility and business incubator that offers both physical on-site mentoring services, as well as virtual mentoring services

### **Ulster County Collaborations**

The HVCI was born from the collaborative efforts of UCDC and the Hudson Valley Technology Development Center to form a business incubator for the area.

**Region of Influence:** Counties of Ulster, Sullivan, Orange, Putnam, Dutchess, Rockland, and Westchester

**Website:** <http://www.hvcfi.com/index2.aspx>

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<sup>23</sup> Retrieved from <http://www.hvcfi.com/index2.aspx> on 2/7/07

## Hudson Valley Economic Development Corporation



### Mission/Function

Serving as a one-stop shop for businesses considering a relocation or expansion in the region, HVEDC works closely with the Empire State Development Corporation, environmental groups such as Scenic Hudson and Hudson River Valley Greenway, utilities and economic development groups in the nine counties: Westchester, Rockland, Putnam, Orange, Dutchess, Ulster, Sullivan, Columbia County and Greene County. HVEDC focuses on marketing buildings and sites that have already gone through the local land-use planning process and have been identified for development or redevelopment.<sup>24</sup>

### Economic Development Programs & Initiatives

- \$7.5 million marketing initiative for a nine-County region (Westchester, Rockland, Putnam, Orange, Dutchess, Ulster, Sullivan, Columbia County and Greene County) in the Hudson Valley
- HVEDC focuses on marketing buildings and sites that have already gone through the local land-use planning process and have been identified for development or redevelopment.

Target industries include:

- Semiconductor and microelectronics
- Biotech and pharmaceutical
- Information technology
- Finance and insurance

### Ulster County Collaborations

HVEDC primarily serves as a marketing entity, and Ulster County is included in their efforts. They also serve as a point of entry for Empire Zone Incentives. HVEDC's marketing initiative is funded by Central Hudson Gas & Electric Corporation. Their purview of Empire Zones includes those in the eight other counties within their service area. There may be opportunity for further alignment with UCDC's *Shovel Ready Fund* which provides financing for municipalities to assess their ability to support commercial development and/or develop the necessary infrastructure.

**Region of Influence:** Counties of Westchester, Rockland, Putnam, Orange, Dutchess, Ulster, Sullivan, Columbia, and Greene.

**Website:** <http://www.hvedc.com/index.cfm>

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<sup>24</sup> Retrieved from <http://www.hvedc.com/index.cfm> on 2/7/07.

## Hudson Valley Technology Development Center



### **Mission/Function**

The Hudson Valley Technology Development Center (HVTDC) helps small to medium-sized manufacturers, businesses, inventors, and entrepreneurs in the seven-County Hudson Valley area to become more competitive in the marketplace. HVTDC provides direct assistance or locates outside resources to help with business development, operations, sales and marketing, work force development, technology advancement and integration, and entrepreneurial initiatives. The Hudson Valley Technology Development Center (HVTDC) is a non-profit organization funded in part by the New York State Office of Science, Technology and Academic Research (NYSTAR). Founded in 1988, HVTDC also receives funding from the National Institute of Standards and Technology (NIST)<sup>25</sup>.

### **Economic Development Programs & Initiatives**

- Business consulting
- Technology & Entrepreneurial Assistance Program for businesses or individuals developing new products
- Funding assistance with NYS Environmental Investment Program & NYS Industrial Effectiveness Program; NYS Energy Research & Development Authority programs
- Work Force Investment Board programs
- Free business expert speaker

### **Ulster County Collaborations**

HVTDC serves as NYSTAR®'s designated Regional Technology Development Center for the Hudson Valley, UCDC partnered with HVDTC to develop the Hudson Valley Center for innovation.

**Region of Influence:** Hudson Valley

**Website:** <http://www.hvtdc.org/>

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<sup>25</sup> Retrieved from <http://www.hvtdc.org/> on 2/7/07.

## Kingston Ulster Empire Zone



### Mission/Function

The Kingston/Ulster EZ was initially designated July 27, 1994 and through several boundary revisions now has subzones in portions of the City of Kingston and the Towns of Ulster, Saugerties and Wawarsing. The purpose of the Empire Zone is to create and retain jobs and induce investment in properties within the Zone. Consequently, the EZ has targeted firms looking to expand their operations, at businesses looking to provide services and assistance to residents within the zone, and at business start-ups.<sup>26</sup>

### Economic Development Programs & Initiatives

- Wage Tax Credit
- Investment Tax Credit
- Real Property Tax Abatement
- Sales Tax Refund (building materials)
- Tax Reduction Tax Credit
- Real Property Tax Credit
- Sales Tax Exemption
- Zone Capital Credits for Community Development Projects
- Zone Capital Credits for Direct Equity Investments
- Statewide Zone Capital Corporation (SZCC)

### Ulster County Collaborations

UCDC provides access to Kingston/Ulster Empire Zone benefits and incentives.

**Region of Influence:** Ulster County

**Website:** <http://www.kingstonedz.com/home.html>

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<sup>26</sup> Retrieved from <http://www.kingstonez.com/overview.html> on 2/7/07.

## Mid-Hudson Region Small Business Development Center



### **Mission/Function**

Through a network of 23 regional centers, the Small Business Development Center (SBDC) delivers high quality business counseling and training to New Yorkers who want to start a business or improve the performance of an existing business. Thanks to partners in the public and private sectors, the services are free of charge and have significant impact. The SBDC is partially funded by the US Small Business Association, and is administered by the State University of New York.<sup>27</sup>

### **Economic Development Programs & Initiatives**

- The SBDC offers consulting free of charge to New York businesses to:
  - understand the importance of a business plan
  - discover sources of funding
  - prepare for e-commerce
  - identify avenues for exporting goods & services
  - develop marketing plans
  - assess an invention's viability
  - comply with licensing & regulations

### **Ulster County Collaborations**

The SBDC is part of the Ulster County Red Carpet Business Services Team based in the Business Resource Center with the Ulster County Work Force Development System and the Ulster County Office of Employment and Training. The SBDC works with UCDC and the other Red Carpet Team members in fulfilling its mission of providing business consulting.

**Region of Influence:** Counties of Dutchess, Orange, Schoharie, Ulster, Greene, Delaware, and Sullivan.

**Website:** <http://www.nyssbdc.org/centers/centers.cfm?centid=15>

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<sup>27</sup> Retrieved from <http://www.nyssbdc.org> on 2/7/07.

## New York Business Development Corporation



### **Mission/Function**

“The New York Business Development Corporation (NYBDC) mission is to promote economic activity within New York state by providing innovative loans to small and medium-size businesses; to assist their partner banks in making such loans; and, particularly, to assist minority and women-owned businesses by offering credit opportunities not otherwise available to them.”<sup>28</sup>

### **Economic Development Programs & Initiatives**

- Lending for businesses which may not qualify for traditional financing

### **Ulster County Collaborations**

Ulster County Development Corporation is a NYBDC community partner to which it provides referrals.

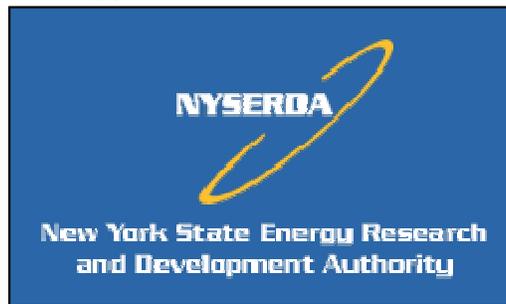
**Region of Influence:** State of New York

**Website:** <http://www.nybdc.com/index.html>

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<sup>28</sup> Retrieved from <http://www.nybdc.com/about.htm> on 2/7/2007.

## New York State Energy Research and Development Authority



### Mission/Function

“The New York State Energy Research and Development Authority (NYSERDA) is a public benefit corporation created in 1975 by the New York State Legislature. NYSEDA administers the **New York Energy \$mart<sup>SM</sup>** program, which is designed to support certain public benefit programs during the transition to a more competitive electricity market. Some 2,700 projects in 40 programs are funded by a charge on the electricity transmitted and distributed by the State's investor-owned utilities. The New York Energy \$mart<sup>SM</sup> program provides energy efficiency services, including those directed at the low-income sector, research and development, and environmental protection activities.”<sup>29</sup>

### Economic Development Programs & Initiatives

- Using a regional marketing approach through its Albany headquarters and two regional offices in Buffalo and New York City, the economic development program seeks to identify quality projects that fit into the scope of NYSEDA's funding and program offerings and provide technical and financial assistance to companies concerned about energy and environmental efficiency.
- Through partnerships with organizations such as the NYS Empire State Development Corporation, chambers of commerce, local development corporations and business trade groups, NYSEDA brings its public benefit programs to regional markets targeted as having high potential for increased energy efficiency and positive economic impact on the local economy

### Ulster County Collaborations

The NYSEDA works with a variety of other entities such as local/regional economic development agencies. The NYSEDA is represented within the Ulster County Red Carpet Business Services Team based in the Business Resource Center with the Ulster County Work Force Development System and the Ulster County Office of Employment and Training. UCDC is a member of the Red Carpet Team, and therefore can coordinate and leverage NYSEDA programs and efforts.

**Region of Influence:** State of New York

**Website:** <http://www.nyserda.org/default.asp>

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<sup>29</sup> Retrieved from <http://www.nyserda.org/About/default.asp> on 2/7/2007.

## New York State Office of Science, Technology, and Academic Research



### Mission/Function

The New York State Office of Science, Technology and Academic Research (NYSTAR) is a state agency charged with growing New York State's leadership position in high technology research and economic development. A central element of NYSTAR's mission is the recognition that New York's public and private research universities and academic centers can be powerful economic development engines.<sup>30</sup>

### Economic Development Programs & Initiatives

- 8 Strategically Targeted Academic Research (STAR) Centers
- 5 Advanced Research Centers (ARC),
- 15 Centers for Advanced Technology (CAT)
- 2 College Applied Research and Technology (CART) centers
- 10 Regional Technology Development Centers (RTDCs)

### Ulster County Collaborations

Hudson Valley Technology Development Center is the Ulster area designated Regional Technology Development Centers. The Business Resource Center in Kingston is one of NYSTAR's statewide incubators.

**Region of Influence:** State of New York

**Website:** <http://www.nystar.state.ny.us/>

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<sup>30</sup> Retrieved from <http://www.nystar.state.ny.us/about.htm> on 2/7/07.

## Rural Ulster Preservation Company



### Mission/Function

“Rural Ulster Preservation Company (RUPCO) is a private, not-for-profit housing organization that creates housing opportunities for low and moderate income households in Ulster County, New York.”<sup>31</sup>

### Economic Development Programs & Initiatives

- Real Estate Development
- Property Management
- Owner Occupied and Rental Rehabilitation
- NeighborWorks®
- HomeOwnership Center
- Counseling
- Emergency Assistance
- Technical Assistance

### Ulster County Collaborations

The Ulster County Housing Consortium was formed in 2000, and established in 2002 as the advisory body of the Ulster County Legislature on housing issues and housing development in Ulster County. The Housing Consortium coordinates Ulster County’s efforts to access federal funding, as well as providing a common platform for the variety of housing related organizations and stakeholder groups in the area. The Consortium members include private businesses, government entities, and non-profit organizations. RUPCO, UCDC, and UCIDA work collaboratively on housing issues through the Consortium.

**Region of Influence:** Ulster County

**Website:** <http://www.rupco.org/>

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<sup>31</sup> Retrieved from <http://www.rupco.org/> on 2/7/2007.

## Ulster County Development Corporation



### **Mission/Function**

As Ulster County's lead economic development agency, the mission of the Ulster County Development Corporation (UCDC) is to act as a catalyst for creating wealth, improving the quality of life and fostering economic opportunity for Ulster County located in New York's Hudson River Valley.<sup>32</sup>

### **Economic Development Programs & Initiatives**

- Development 21 Initiative
  - Shovel Ready Fund
  - Telecommunications Fund
- Kingston/Ulster Empire Zone
- UCIDA Access
- Revolving Loan Funds
- Ulster County Municipal Revolving Loan Funds
- Business Development Programs
- One-stop access to economic development services

### **Ulster County Collaborations**

UCDC works directly with UCIDA, Kingston/Ulster Empire Zone, partners with Work Force Development System, Chamber of Commerce Ulster; member of the Housing Consortium, WDS Red Carpet Services Team; refers clients to the New York Business Development Corporation; and partnered with the Hudson Valley Technology Development Center (a NYSTAR Regional Technology Development Center) to develop the Hudson Valley Center for Innovation.

**Region of Influence:** Ulster County

**Website:** <http://www.ulsterny.com>

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<sup>32</sup> Retrieved from <http://www.ulsterny.com/pages/about.html> on 2/7/07.

## Ulster County Industrial Development Agency



### **Mission/Function**

The Ulster County Industrial Development Agency (UCIDA) is a public benefit corporation of the State of New York and has been in existence since 1976. The mission of the UCIDA is to advance the job opportunities, general prosperity and long-term economic vitality of Ulster County residents by targeting assistance to foster creation and attraction of new business and the retention and expansion of existing business.<sup>33</sup>

### **Economic Development Programs & Initiatives**

- Issue taxable and tax-exempt industrial development revenue bonds for qualified projects

### **Ulster County Collaborations**

The UCIDA works in partnership with the Chamber of Commerce of Ulster County, the Ulster County Development Corporation and the Ulster County Planning Department.

**Region of Influence:** Ulster County

**Website:** <http://www.ulsterny.com>

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<sup>33</sup> Retrieved from <http://www.ulsterny.com/pdfs/IDAWhoWeAre3.pdf> on 2/7/07.

## Ulster County Work Force Development System



### Mission/Function

The Ulster County Work Force Development System is comprised of a variety of community partners; their primary mission is to support the growth of the local economy by meeting the employment needs of job seekers, current workers and businesses.<sup>34</sup>

### Economic Development Programs & Initiatives

- The Ulster County Work Force Development System and One-Stop Job Center are convenient and cost effective resources for hiring new employees and remaining competitive. They provide:
  - easy posting of job openings
  - recruitment assistance,
  - information on hiring incentives, the labor market, On-the-Job Training, customized training and apprenticeships programs.
- Ulster County Red Carpet Business Services Team
- For job seekers:
  - information on job openings and the labor market
  - career counseling, training opportunities (for those who qualify)
  - free workshops, and use of computers with Internet access, faxes, phones and copiers.

### Ulster County Collaborations

The Ulster County WDS works in partnership with UCDC as well as other Ulster County Red Carpet Team with members including: Chamber of Commerce Ulster Co., Kingston/Ulster Empire Zone, Small Business Development Center, and NYSERDA (Mid-Hudson Energy Smart Communities).

**Region of Influence:** Ulster County

**Website:** <http://www.workforcenewyork.org/ulster/index.htm>

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<sup>34</sup> Retrieved from <http://www.workforcenewyork.org/ulster/> on 2/7/07.

## Appendix D: Economic Development Agencies

ORGANIZATION	DESCRIPTION OF SERVICES	CONTACT INFORMATION
Business Gateway	All government info online	1800 F Street, NW Washington, DC 20405 1-800-333-4636
Catskill Watershed Corporation	Promote development through protecting and educating about new york's water systems	PO Box 569 Margaretville, NY 12455 (845) 586-1401 alrosa@cwconline.orgwww.cwconline.org
Council of Industry of Southeastern New York	Provide training and education opportunities and sub council networking	NY (845) 565-1355 hking@councilofindustry.org www.councilofindustry.org
Ellenville-Wawarsing Chamber of Commerce	Promotes economic development, tourism, community betterment and legislative action in the town of Ellenville and Wawarsing	PO Box 227 5 Berne Rd Ellenville, NY 12428 (845) 647-6570 Webmaster@EllenvilleWawarsingChamberOfCommerce.com www.ewcoc.com
Empire State Development Corporation	Promotes travel, tourism, businesses and small businesses	633 Third Avenue New York, NY 10017 (800) 782-8369 www.empire.state.ny.us
Environmental Facilities Corporation	Helps businesses comply with federal environmental regulations	625 Broadway Albany, NY 12207-2997 (518) 402-7433 www.nysefc.org/home/index.asp
Esopus Business Association	Business association in Port Owen	Port Ewen, NY 12466 (845) 339-3951
Federal Home Loan Bank of New York	Maximizing the capacity of community based member lenders to serve the market and thus advance housing opportunities and community development	101 Park Avenue New York, NY 10178-0599 (212) 681-6000 www.fhlbny.com
Hudson Valley Business Center	High powered, low cost office space--low rent--good work force--conveniently located	NY (845) 339-9100 tom@commercialassoc.com www.hvbusinesscenter.com
Hudson Valley Greenway	Organization designed to facilitate the historical, cultural, natural, scenic and recreational preservation of the area	Capitol Building, Capitol Station, Room 254 Albany, NY 12224 (518) 473-3835 www.hudsongreenway.state.ny.us
Hudson Valley International Trade Association	Mentors and advises with regards to int'l trade	11 Paddock Pl Newburgh, NY 12550 (845) 566-3100 hvita@att.net www.hvita.org
Hudson Valley Technology and Commerce	Promotes making the Hudson Valley a high tech place to live	31 Mill Rd Suite 20 Woodstock, NY 12498 rdragon@hvtc.org www.hvtc.org
Hudson Valley Technology Development Center	Provides support to small manufacturers and early stage technology companies	300 Westage Business Center Suite 280 Fishkill, NY 12524 (845) 896-6934 tphillips@hvtdc.org www.hvtdc.org
Hudson Valley Economic Development Corporation	Markets the Hudson Valley as a prime location for businesses	555 Hudson Valley Avenue Suite 106 New Windsor, NY 12553 (845) 220-2247 acampagiorni@hvedc.com www.hvedc.org
Kerhonkson Chamber of Commerce	Local Chamber of Commerce	90 Saint Josen Rd Accord, NY 12404 (845) 626-2616
Kingston Business Park	Quality building sites for business	NY www.ci.kingston.ny.us/kbp/home.html
Kingston-Ulster Economic Development Zone	Offers a variety of resources and opportunities for businesses exploring start-up or expansion projects.	420 Broadway Kingston, NY 12401-4626 (845) 334-3962 www.kingstonedz.com/
Marbletown Business Association	The Marbletown Business Association is organized to provide a venue for local businesses to network, exchange ideas and develop strategies aimed towards smart community and economic development and to advance the civic, business and agricultural interests in Marbletown and the surrounding communities.	3853 Main St Stone Ridge, NY 12484 (845) 687-4567 info@marbletown.org marbletown.org
Mid-Hudson Pattern for Progress	Research agency that provides planning assistance to state/local government and private industry	Desmond Campus 6 Albany Post Rd Newburgh, NY 12550 (845) 565-4900 mditullo@pfprogress.org www.pattern-for-progress.org

ORGANIZATION	DESCRIPTION OF SERVICES	CONTACT INFORMATION
New Paltz Chamber of Commerce	Advancing the business, civic, agricultural and industrial interests of the town of New Paltz	124 Main St New Paltz, NY 12561 (845) 255-0243 info@newpaltzchamber.org www.newpaltzchamber.org
New York Business Development Corporation	Lends money to businesses in New York	50 Beaver St Albany, NY 12207 1-800-923-2504 www.nybdc.com
New York State Energy Research and Development Authority	Provides government supported low cost electricity	17 Columbia Circle Albany, NY 12203-6399 1-866-NYSERDA www.nyserda.org
New York's Tech Valley	This is an area from quebec to nyc and this is just its webpage	107 Washington Avenue Albany, NY 12210 (518) 431-1300 www.techvalley.org
NYS Department of Labor	Provides unemployment and employment services for the people of new york	W. Averell Harriman State Office Campus Building 12 Albany, NY 12240 (518) 457-9000 nysdol@labor.state.ny.us www.labor.state.ny.us
NYS Economic Development Council	The NYSEDC main programs: lobbying the government about issues that affect economic development, conducting education and professional development programs, and organizing marketing programs that promote new york as a world class place to do business	19 Dove St Suite 101 Albany, NY 12210 (518) 426-4058 mcmahon@nysedc.org www.nysedc.org
Rosendale Chamber of Commerce	To promote business in and around Rosendale, New York	PO Box 533 Rosendale, NY 12472-0533 www.rosendalechamber.com
Saugerties Business Association	The Saugerties Area Chamber of Commerce is a not-for-profit organization dedicated to the promotion of Saugerties as a wonderful place to live, work, and shop. First begun in 1979, it has a strong and growing membership which is committed to preserving the quality of life in Saugerties, while providing a positive environment for business and personal growth.	4 High St Saugerties, NY 12477 (845) 246-2800 jwilsey@saugerties.ny.us www.saugerties.ny.us
Small Business Development Center	Help sustain and start local businesses	1 Development Court Kingston, NY 12401 (845) 339-0025 sbdc@sunylulster.edu www.nyssbdc.org/centers/centers.cfm?centid=15
Southern Ulster Chamber	Local Chamber of Commerce	33 Main St. Highland, NY 12528 (845) 691-6070 southulsterchamber@hotmail.com www.southernulsterchamber.org
Sullivan-Wararsing REAP Zone	Program designed to economically revitalize poor rural areas	1 Cablevision Center Suite 155 Ferndale, NY 12734 (845) 295-2632 Rick.Bishop@co.sullivan.ny.us www.ezec.gov/Communit/nyreap.html
TechCity Properties, Inc.	Business center with--low rates, lots of space, good infrastructure and environment and skilled labor force	300 Enterprise Dr. Kingston, NY 12401-7004 (845) 383-0400 www.techcity.net
Ulster County Chamber	"To advance the economic health and vitality of Ulster County."	55 Albany Ave Kingston, NY 12401 (845) 338-5100 info@ulsterchamber.org www.ulsterchamber.org
Ulster County Community and Family Guides	Community resource guide	PO Box 42 Woodstock, NY 12498 (845) 679-0569 info@firstcx.com www.firstcx.com
Ulster County Development Corporation (UCDC)	The Ulster County Development Corporation, a private not-for-profit organization, is the lead economic development agency for the County with a mission of creating and maintaining jobs through the attraction of new business or the retention and expansion of existing business. In order to accomplish this objective, UCDC offers and administers financial programs and loan funds, assists with site selection, and provides overall guidance and assistance with general and specific business problems, issues and opportunities.	5 Development Court Kingston, NY 12401 (845) 338-8840 develop@ulsterny.com www.ulsterny.com

ORGANIZATION	DESCRIPTION OF SERVICES	CONTACT INFORMATION
Ulster County Office of Employment and Training	The Office of Employment and Training (OET) is a federally funded, locally operated program offering cost assisted training and placement services to employers, dislocated workers and individuals who meet our adult low income priority guidelines. Our mission is to enhance the economic vitality of Ulster County by developing or upgrading the skills of job seekers to meet the needs of local employers.	651 Development Court Kingston, NY 12401 (845) 340-3170 www.co.ulster.ny.us/oet
Ulster County Purchasing Department	The Purchasing Department purchases goods and services for all Ulster County departments. Its mission is to secure the best quality product or service for the best price in accordance with New York State laws and regulations established for government purchasing.	310 Flatbush Avenue Kingston, NY 12401 (845) 340-3400 rper@co.ulster.ny.us www.co.ulster.ny.us/purchasing
Ulster County Real Property Tax Service Agency	The Ulster County Real Property Tax Service Agency is a statutory agency that exists to provide services that assist local government officials to achieve and maintain equitable assessment administration.	PO Box 1800 Kingston, NY 12402 (845) 340-3490
Ulster County Tourism Office	Provides information for people traveling to Ulster County	10 Westbrook Lane Kingston, NY 12401 1-800-DIAL-UCO tourism@co.ulster.ny.us www.ulstertourism.info
Ulster County Treasurer's Office	The Treasurer's Office is responsible for recording and reporting the financial condition of the County within the guidelines set forth by Generally Accepted Accounting Principles.	PO Box 1800 Kingston, NY 12402 (845) 340-3460

## Appendix E: Political Office Holders

NAME	TITLE	ADDRESS	ADDRESS 2	CITY	BUSINESS #	EMAIL
The Honorable Susan Cummings	Legislator, District 1	12 Clair Court		Ellenville, NY 12428	(845) 255-9656	suedist1@aol.com
The Honorable Leonard Distel	Legislator, District 1	1748 Ulster Heights Road		Ellenville, NY 12428		contact@leonardmdistel.org
The Honorable Mary Sheeley	Legislator, District 1	15 Clifford Street		Ellenville, NY 12428	(845) 647-6980	msheelley@gmail.com
The Honorable Joseph Stoeckeler, Jr.	Legislator, District 1	P.O. Box 187		Ellenville, NY 12428	(845) 626-3555	
The Honorable Donald Gregorius	Legislator, District 2	P.O. Box 384		Woodstock, NY 12498		lindon7@hvc.rr.com
The Honorable Brian Shapiro	Legislator, District 2	110 Mill Hill Road		Woodstock, NY 12498		shapiro@localnet.com
The Honorable Peter Kraft	Legislator, District 3	348 Old Route 28		Glenford, NY 12433	(914) 466-3033	pkraft8136@aol.com
The Honorable Richard Parete	Legislator, District 3	289 Cherry Hill Road		Accord, NY 12404		rparete@verizon.net
The Honorable Robert Parete	Legislator, District 3	3948 Route 28, P.O. Box 1		Boiceville, NY 12412		rpar@co.ulster.ny.us
The Honorable Robert Aiello	Legislator, District 4	14 Birchwood Drive West		Saugerties, NY 12477	(845) 246-3775	racaka@ulster.net
The Honorable Gary Bischoff	Legislator, District 4	213 Charles Hommel Road		Saugerties, NY 12477		
The Honorable Dean Fabiano	Legislator, District 4	P.O. Box 289		Glasco, NY 12432	(845) 246-2400	fabgirls3@verizon.net
The Honorable Joseph Roberti	Legislator, District 4	P.O. Box 127		Glasco, NY 12432		
The Honorable Michael Berardi	Legislator, District 5	430 Country Club Lane	P.O. Box 1163	Kingston, NY 12402	(845) 853-7405	mikeb4302000@yahoo.com
The Honorable Brian Cahill	Legislator, District 5	1106 Dalewood Street		Kingston, NY 12401		ulsterkingston@yahoo.com
The Honorable Frank Dart	Legislator, District 6	135 Second Avenue		Kingston, NY 12401		
The Honorable Jeanette Provenzano	Legislator, District 6	34 Hanratty Street		Kingston, NY 12401		
The Honorable Joan Every	Legislator, District 7	4 Mountain View Avenue		Rosendale, NY 12472		
The Honorable Alan Lomita	Legislator, District 7	27 Mountain Road		Rosendale, NY 12472		
The Honorable Philip Terpening	Legislator, District 7	290 White Port Road		Kingston, NY 12401		pcterpening@aol.com
The Honorable Tracey Bartels	Legislator, District 8	45 Sand Hill Road,	P.O. Box 136	Gardiner, NY 12525		traceybartels@earthlink.net
The Honorable Peter Liepmann	Legislator, District 8	106 Plains Road		New Paltz, NY 12561	(845) 691-6060	peterl@hvc.rr.com
The Honorable Glenn Noonan	Legislator, District 8	109 Sandhill Road		Gardiner, NY 12525		noonan57@aol.com
The Honorable Frank Felicello	Legislator, District 9	118 Mulberry Lane,	P.O. Box 371	Marlboro, NY 12542	(845) 236-5840	
The Honorable Richard Gerentine	Legislator, District 9	43 South Road		Marlboro, NY 12542	(845) 236-3385	
The Honorable Wayne Harris	Legislator, District 9	53 Hull Avenue,	P.O. Box 251	Clintondale, NY 12515		
The Honorable William McAfee	Legislator, District 9	797 Route 44/55		Highland, NY 12528		
The Honorable Hector Rodriguez	Legislator, District 10	P.O. Box 1124		New Paltz, NY 12561		hectorsrodriguez@yahoo.com
The Honorable Susan Zimet	Legislator, District 10	100 Butterville Road,	P.O. Box 205	New Paltz, NY 12561		zauerbach1@aol.com
The Honorable Elizabeth Alfonso	Legislator, District 11	10 New Paltz Road		Highland, NY 12528		uciliza11@optonline.net
The Honorable Charles Busick	Legislator, District 11	153 South Riverside Road		Highland, NY 12528		memapapalc@aol.com
The Honorable David Donaldson	Legislator, District 12	148 Henry Street		Kingston, NY 12401	(845) 340-3699	ddon@co.ulster.ny.us
The Honorable Peter Loughran	Legislator, District 12	36 Liberty Street		Kingston, NY 12401		loughran1@email.msn.com
The Honorable William Bruning	Supervisor, Town of Denning	Town Hall,	P.O. Box 277	Claryville, NY 12725		
The Honorable John Coutant	Supervisor, Town of Esopus	Town Hall, 172 Broadway,	P.O. Box 700	Port Ewen, NY 12466	(845) 331-0676	supervisor@esopus.com
The Honorable Carl Zatz	Supervisor, Town of Gardiner	Town Hall, 133 Main Street	P.O. Box 1	Gardiner, NY 12525	(845) 255-9675	
The Honorable Jerry Fairbairn	Supervisor, Town of Hardenburgh	Town Hall	39 Rider Hollow Road	Arkville, NY 12406	(845) 586-3135	
The Honorable Michael Shultis	Supervisor, Town of Hurley	Town Hall, 10 Wamsley Place	P.O. Box 569	Hurley, NY 12443	(845) 331-7474	
The Honorable Frank Brogden	Supervisor, Town of Kingston	Town Hall	906 Sawkill Road	Kingston, NY 12401	(845) 336-8853	truck154@msn.com
The Honorable Robert Shepherd	Supervisor, Town of Lloyd	Town Hall	12 Church Street	Highland, NY 12528	(845) 691-2144	
The Honorable Vincent Martello	Supervisor, Town of Marbletown	Town Hall	P.O. Box 217	Stone Ridge, NY 12484	(845) 687-7601	supervisor@marbletown.net
The Honorable Alphonso Lanzetta	Supervisor, Town of Marlborough	Town Hall	P.O. Box 305	Milton, NY 12547	(845) 795-5100	
The Honorable Toni Hokanson	Supervisor, Town of New Paltz	Town Hall	P.O. Box 550	New Paltz, NY 12561	(845) 255-0604	supervisor@townofnewpaltz.org
The Honorable Berndt Leifeld	Supervisor, Town of Olive	Town Hall	P.O. Box 180	West Shokan, NY 12494	(845) 657-8118	olivesupervisor@hvc.rr.com
The Honorable Bruce Loertscher	Supervisor, Town of Plattekill	Town Hall	P.O. Box 45	Modena, NY 12548	(845) 883-7331	
The Honorable Pamela Duke	Supervisor, Town of Rochester	Town Hall, 50 Scenic Road	P.O. Box 65	Accord, NY 12404	(845) 626-7384	
The Honorable Robert Gallagher	Supervisor, Town of Rosendale	Town Hall, Main Street	P.O. Box 423	Rosendale, NY 12472	(845) 658-3159	
The Honorable Gregory Helmsmoortel	Supervisor, Town of Saugerties	Town Hall	4 High Street	Saugerties, NY 12477	(845) 246-2800	
The Honorable Robert Cross, Jr.	Supervisor, Town of Shandaken	Town Hall	P.O. Box 134	Shandaken, NY 12480	(845) 688-7165	supervisor@shandaken.us
The Honorable John Valk	Supervisor, Town of Shawangunk	Town Hall	P.O. Box 247	Walkkill, NY 12589	(845) 895-2900	jvalkjr@hvc.rr.com
The Honorable Nick Woerner	Supervisor, Town of Ulster	1 Town Drive		Lake Katrine, NY 12449	(845) 382-2455	
The Honorable James Dolaway	Supervisor, Town of Wawarsing	Town Hall, 108 Canal Street	P.O. 671	Ellenville, NY 12428	(845) 647-6570	wawsupervisor@hvc.rr.com
The Honorable Jeremy Wilbur	Supervisor, Town of Woodstock	Town Hall	45 Comeau Drive	Woodstock, NY 12498	(845) 679-2113	
The Honorable Jeffrey Kaplan	Mayor, Village of Ellenville	Village Hall	81 North Main Street	Ellenville, NY 12428	(845) 647-7080	
The Honorable Jason West	Mayor, Village of New Paltz	Village Hall	P.O. Box 877	New Paltz, NY 12561	(845) 255-1413	
The Honorable Robert Yerick	Mayor, Village of Saugerties	Village Hall	43 Partition Street	Saugerties, NY 12477	(845) 246-2321	
The Honorable James Sottile	Mayor, City of Kingston	City Hall	420 Broadway	Kingston, NY 12401	(845) 310-080	

## APPENDIX F: COLLABORATIVE COMMUNITY ENGAGEMENT MEMBERS

First	Last	Capital Group	Company
Thomas	Alworth	Natural	Catskill Center for Conservation & Development
Krista	Barringer	Social	Ulster County Youth Bureau
Jessica	Barry	Natural	Mid Hudson Energy Smart Communities
Kenneth	Beesmer	Social	Smith Barney, Inc.
Michael	Berg	Social	Family of Woodstock
Jim	Bogner	Natural	NYC Department of Environmental Protection
Sherri	Brittain	Cultural	Ulster County Arts Council
Patricia	Brooks	Economic	Brooks & Brooks Land Surveyors
Barbara	Budik	Natural	Town of Saugerties
Mark	Castiglione	Social	Hudson River Valley Greenway
Chris	Coccio	Human	Sono-Tek
Robert	Collier	Social	
Nat	Collins	Cultural	JNC Consulting
John	Crews	Physical	Hudson Valley Regional Council
Andrea	Cunliffe	Natural	
Ken	Davenport	Economic	Heritagenergy
Thomas	Dee	Human	Benedictine Hospital
John	DeJoy	Social	Marist College
Robert	Dennison	Physical	Department of Transportation
Dennis	Doyle	Social	Ulster County Planning
Ric	Dragon	Natural	Hudson Valley Technology & Commerce
Kim	Emerson	Cultural	Saugerties resident
Melissa	Everett	Social	Sustainable Hudson Valley
Frank	Falatyn	Economic	Fala Technologies Inc.
Jennifer	Fuentes	Natural	Hudson Valley Area Labor Federation
Jo	Galante	Physical	Ulster Greene ARC
March	Gallagher	Physical	Chair, Ulster County Industrial Development Agency
Chuck	Genck	Economic	Thylan Development
Paul	Hakim	Economic	Wilber National Bank
Carolyn	Hansen	Social	
Toni	Hokanson	Physical	Town Hall
Donald	Katt	Social	SUNY Ulster
Paul	Kellar	Cultural	Kellar Kellar & Jaiven
Katy	Kondrat	Cultural	
Meryl	Kramer-Harrison	Human	
Debbie	Kwiatoski	Physical	Hudson Valley Business Journal
Irene	Macpherson	Human	Ulster County Development Corporation
Catherine	Maloney	Physical	
Ron	Marquette	Human	AVR Realty
Anne	Marrott	Cultural	SUNY Ulster
Julie	McQuain	Economic	JMPR Associates, Inc.
Vic	Melville	Economic	Melville Enterprises, LLC
Les	Neuman	Physical	Hudson Valley Center for Innovation

<b>First</b>	<b>Last</b>	<b>Capital Group</b>	<b>Company</b>
Kevin	O'Connor	Physical	Rural Ulster Preservation Company
Ellen	O'Leary	Economic	M & T Bank
Terry	Parisian	Economic	Hudson Valley Mall
Paul	Rakov	Cultural	Emerson Resort & Spa
Lydia	Reidy	Natural	Cornell Cooperative Extension
Hector	Rodriquez	Social	Ulster County Legislature
Susan	Rounds	Cultural	American Red Cross
Martin	Ruglis	Human	Ulster County BOCES
Robert	Ryan	Human	Ryan Insurance
Finely	Schaef	Human	
Nancy	Schaef	Human	Office of Employment & Training
Jennifer	Schwartz	Economic	Ulster County Planning
Linda	Shoub	Natural	SaudmderSkill Farms
Adam	Snyder	Physical	
Constance	Snyder	Cultural	CRSR Design
Rosalind	Stark	Cultural	Kingston Schools
Geddy	Sveikauskas	Cultural	Ulster Publishing
Meli	Thomas	Cultural	
Ward	Todd	Human	Ulster County Chamber of Commerce
Arthur	Upright	Economic	

## Appendix G: Collaborative Community Engagement Stakeholder Groups

### Capital Group Descriptions

Through experience, economic development strategists have determined that the more focused stakeholder groups can be, the more specific their strategies; and therefore, the greater the likelihood is for success in implementing sustainable changes. Capital groups allow for a large number of diverse individuals to input a wide variety of personal and professional perspectives that comprise a community. Facilitation of these Capital Groups focuses discussions and dialogue through an economic development lens, resulting in the creation of strategic economic development outcomes. Each Capital Group is described below.

#### Natural Capital Stakeholder Group

**Definition:** **Natural Capital** refers to any natural or environmental asset and their components. Examples of these are: forests, scenic vistas, and ecosystems. In order for natural capital to be relevant to economic development, there must be a relationship between goods and services produced from natural capital and their potential for building a vibrant economy.

The discussion of natural capital gives stakeholders an opportunity to connect priorities in land conservation, environmental protection, developing renewable resources for energy, and the like within its economic development plan.

Examples of natural capital outcomes could be:

- Adopt industry practices that leave the Hudson River 20% cleaner by 2020
- Adopt residential practices that maintain 2006 levels of energy consumption through 2012 and begin to reduce consumption thereafter
- Adopt industry practices that produce cleaner waste and reduce raw waste 5% by 2012 (solid, liquid, air pollution, etc)

#### Physical Capital Stakeholder Group

**Definition:** **Physical Capital** refers to the inventory of material or produced resources. It is anything made by people for use in production, such as tools, clothing, shelter, plants, buildings, infrastructure, or products used to create other products. Whereas natural capital is produced by nature, physical capital is produced by people.

Examples of physical capital outcomes could be:

- Develop public facilities (e.g., hospitals, schools, assisted care facilities) that equal the demographic make-up of Ulster County by 2025
- Provide access to cutting-edge telecommunications for rural resident areas that is equal to urban and suburban residents by 2012
- Develop a policy by 2008 that ensures County roads support traffic flow prior to or in connection with all development projects

#### Economic Capital Stakeholder Group

**Definition:** **Economic Capital** is the result of processes and decisions governing distribution of economic resources that affect material wealth.

Examples of economic capital outcomes could be:

- Develop programs that do more with less through the maximization of existing resources (e.g., using a waste as resource) by 2012
- Establish a financial institution/agency that offers low interest loans for local entrepreneurial ventures by 2008
- Establish technology incubators (such as Experimental Program to Stimulate Competitive Research (EPSCoR), National Business Incubation Association, Small Business Innovation Research and related supporting services) by 2007

### **Human Capital Stakeholder Group**

Definition: **Human Capital** includes the work people do as well as the skills, knowledge and abilities necessary to do that work. Typically, discussions of human capital involve education, work force development, competency identification and development, leadership, training and development activities, and meeting basic needs (food, shelter, safety, employment, education).

Examples of human capital outcomes could be:

- Increase the rate of bachelor degrees for Ulster County residents 25 years and older by 20% by 2017
- Provide training programs to fill jobs with local growth potential and sustainability, such as positions in the healthcare field, by 2012
- Develop programs and incentives for local businesses that partner with schools and colleges to develop work-study programs that benefit the student, schools and colleges, and business community by 2017

### **Social Capital Stakeholder Group**

Definition: **Social Capital** refers to the elements and relationships that bind people and organizations together in a community. When social capital is high, communities experience greater chance for sustainable community development and successful implementation of economic development strategies. Strong community collaboration builds social capital.

Examples of social capital outcomes could include:

- Develop programs and incentives that increase the number of volunteers in Ulster County by 10% by 2017
- Recruit 5% of commuters who live in Ulster County, but work outside of it, to take jobs within the County by 2012
- Increase participatory planning by 10% by 2017

### **Cultural Capital Stakeholder Group**

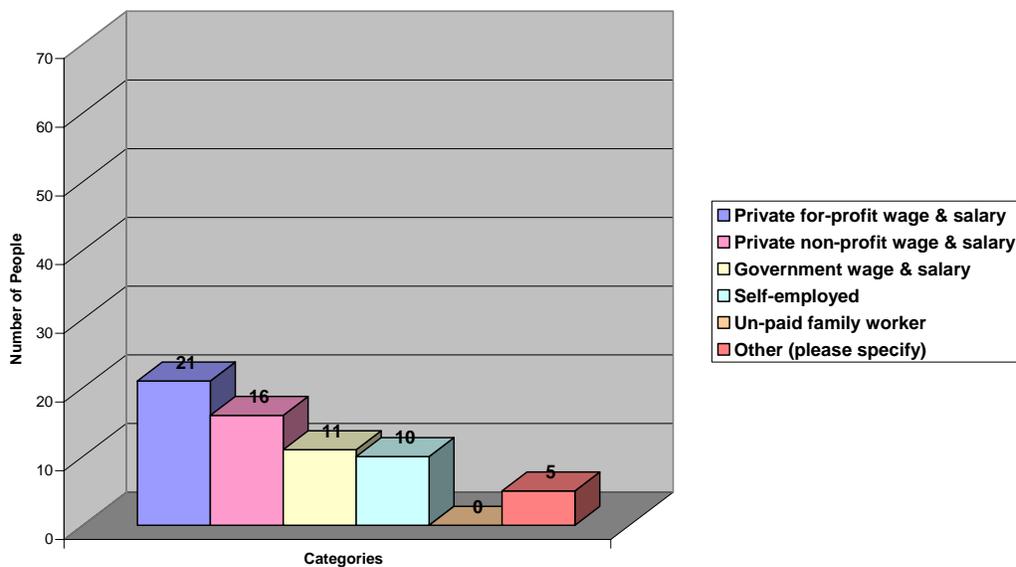
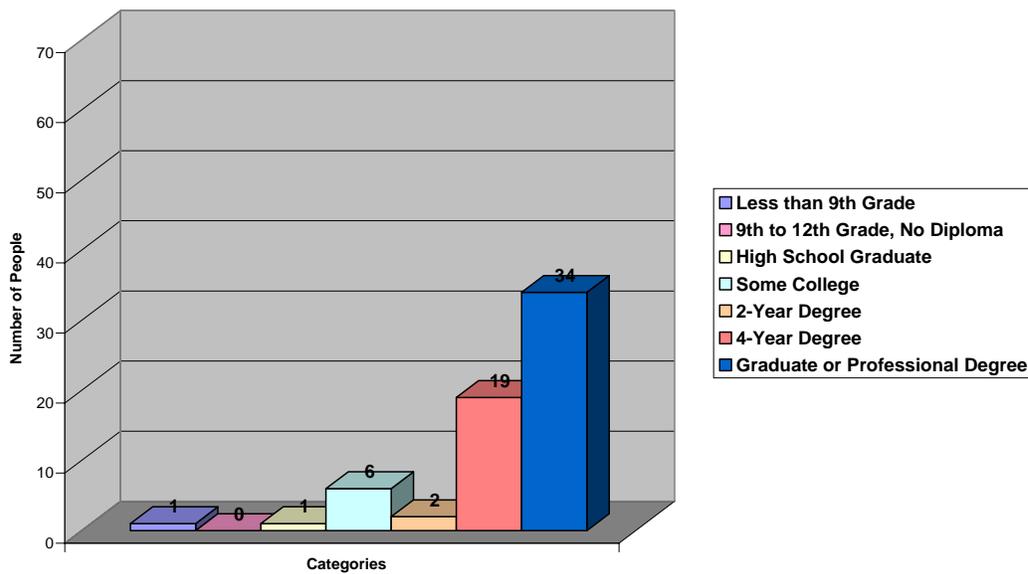
Definition: **Cultural Capital** builds on social capital, and takes into account traditions, history, heritage, values, and identity of a region. It is important to distinguish cultural capital from social capital to acknowledge the distinct cultural differences among counties. While social capital often appears similar across a region, a discussion of cultural capital allows stakeholders to acknowledge sometimes subtle, but distinct differences that inform social capital.

Examples of cultural capital outcomes could include:

- Increase tourism by 10% by 2017
- Increase the number of exhibits throughout Ulster County by 5% by 2012 that highlight local craftsperson's items to sell
- Increase attendance of low-income earners at art exhibits and theater productions by 20% by 2017

## APPENDIX H: COLLABORATIVE COMMUNITY ENGAGEMENT DEMOGRAPHICS

This appendix summarizes the Collaborative Community Engagement demographics survey, effective 10/6/2006. There were 63 respondents, 30 male and 33 female. Forty-seven participants were married; 1 married, but separated; 7 single, never married; and 8 single. Almost all were employed (53), with 5 unemployed and 5 not in the labor force. Four were veterans. Nearly half lived in Kingston (31), 12 in New Paltz, 8 in Saugerties, 3 in Woodstock, 8 in Catskill Mountains, and 1 in Ellenville. Most participants (43) were between the ages of 45-64 years old. There were 6 over 64 years old, 10 between the ages of 35-44, and 4 between the ages of 20-34. The graphs below show educational levels and categories of work, respectively.



## APPENDIX I: PRESENTER LIST AND BIOGRAPHIES

### Economic Development Partnerships

Maureen Halahan, President and CEO, Orange County Partnership;  
Chair, Hudson Valley Economic Development Corporation

### Key Issues to Focus on For Economic Growth in Ulster County

Peter Fairweather, President, Fairweather Consulting

### Infrastructure Presentation

Chris Jones, Vice President for Research, Regional Plan Association

### Work Force Presentation

Frank Surdey, Director, Hudson Valley Region, New York State Department of Labor

### Commercial Real Estate Perspectives

Steven Perfit, Broker/Owner, Upstate Commercial Group, Inc.

### Planning Presentations

Ned Sullivan, President, Scenic Hudson, Inc.

David Church, Director, Orange County Planning Department

### Economic Growth Presentation

Jeffery Carr, President, Economic & Policy Resources

**Maureen Halahan** is President and CEO of the Orange County Partnership, the Economic Development Corporation for Orange County, New York. Ms. Halahan joined the Partnership in 2001 as Director of Business Attraction. She was born and raised in Orange County and is an enthusiastic proponent of economic development. Ms. Halahan serves as the Chair of the Hudson Valley Economic Development Corporation, sits on the Board of Orange County Capital Development Corporation and serves as the Chair of the Marketing Committee for the Leadership Orange Board of Directors.

**Peter Fairweather** has a practice specializing in strategic change processes for communities and organizations. His work draws upon more than twenty years of experience in strategic planning, community planning, education and economic analysis. In addition, he has designed and delivered training programs for clients in New York State, Germany, Greece, and Sweden. He is co-author of an instructional software package on strategic planning published by McGraw-Hill, and has written various articles on community and rural economic development. He is a member of the American Institute of Certified Planners, the Society for College and University Planning and the New York State Economic Development Council.<sup>35</sup>

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<sup>35</sup> Taken from <http://www.fairweatherconsulting.com/about.html>, Fairweather Consultings About Us Page, retrieved on 10/26/06

**Christopher Jones:** As Vice President for Research, Christopher Jones directs RPA's economic, housing, transportation and urban development research. He is currently overseeing RPA's research for a regional housing initiative, property tax reform, redevelopment of Manhattan's Far West Side and Brooklyn's Atlantic Yards, and the Metropolitan Transportation Authority's capital program. He is also leading efforts to develop a regional visioning initiative on Long Island and in other parts of the Tri-State region. Since joining RPA in 1994, he has authored several reports on regional development, economic and work force issues and led multi-disciplinary planning and project teams. Prior to joining RPA, Mr. Jones was the Special Assistant to the Deputy Mayor for Planning and Development in New York City. Previously, he was Supervisor of Forecasting and Analysis for the Port Authority of New York & New Jersey. He has a Masters Degree in Urban Planning from Hunter College of the City University of New York.

**Frank Surdey** was appointed Regional Administrator for the State Labor Department's Division of Employment Services in the Hudson Valley in September 2002. The Division, with 10 office locations throughout the region, provides labor exchange services, maintains a Talent Bank/Job Bank, and provides a variety of business services including recruitment, job fairs and HR consulting. From 1991-2002, Mr. Surdey managed operations for the Department's Research Division in the seven-County Hudson Valley region and had statewide economic development responsibilities. The Research Division is recognized as the primary source of labor market information in New York State. Mr. Surdey also managed Research Division operations in the Mohawk Valley and North County regions and served as a labor market analyst in the Southern tier. Frank Surdey began his career with the State Labor Department soon after receiving a B.S. in Business Economics from the State University of NY, College at Oneonta in 1976.<sup>36</sup>

**Steven Perfit** is the Broker- Owner of Upstate Commercial Group, specializing in brokerage, investing, and consulting for all facets of Commercial Real Estate licensed in New York and Connecticut; 10 years at Upstate 17 years overall experience in real estate. Mr. Perfit achieved CCIM (Certified Commercial Investment Member) designation of the Institute, 1996, SIOR designation (Society of Industrial and Office REALTORS). He was President of NYSCAR (NYS Commercial Association of REALTORS) 2004-2005, Commercial REALTOR of the year 1999 and 2005 (statewide), and is the 2006-2007 Treasurer, CCIM Institute. Prior to Upstate Commercial Group, Mr. Perfit was Managing Director, Bear Stearns and Co., NYC in the Fixed Income Securities Department. He also has experience in Corporate Accounting and Finance and was owner of a contracting company in New Jersey. Mr. Perfit is involved at the local level as Chair American Red Cross, Planning Board Town of Olive, Olive First Aid Unit, EMT, Captain and Chair of the Board, Member, Board of Directors, Ulster County Board of REALTORS. He holds a BS, Business Administration, NYU, and an MBA Finance, Pace University.

**Ned Sullivan** is president of Scenic Hudson, which works to protect and restore the Hudson River and its majestic landscape as an irreplaceable national treasure and a vital resource for residents and visitors. A crusader for the valley since 1963, today it is the largest environmental group focused on the Hudson River Valley. Based in Poughkeepsie, N.Y., Scenic Hudson has a staff of 50 experts who combine land acquisition, support for agriculture, citizen-based advocacy and sophisticated planning tools to create environmentally healthy communities, champion smart

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<sup>36</sup> Retrieved from [http://www.katenconsulting.com/tv\\_show.html](http://www.katenconsulting.com/tv_show.html), on 10/26/06

economic growth, open up riverfronts to the public and preserve the valley's inspiring beauty and natural resources.

**David Church:** AICP Planning Commissioner, The Orange County Department of Planning is engaged in issues of land use planning, transportation, agriculture, training, resource management, open space and economic issues that affect the County.<sup>37</sup>

**Jeffrey B. Carr** has 22 years of experience as an economist with particular expertise in macro-economics, economic forecasting, forensic economics, economic impact analysis, and fiscal policy analysis for federal, state, and local governments. Jeff has served as the State Economist and Principal Revenues Analyst for over 13 years—including the last four gubernatorial administrations in Vermont. He serves as consulting economist to the Vermont Department of Economic Development and a number of businesses and business associations in New England.

Jeff served as Legislative Director and Economist for a member of the U.S. House of Representatives. He also served in the Executive Branch of Vermont government, as Research Director for a United States Senate campaign, and as Director of Research for a national education organization specializing in federal fiscal policy analysis. He has been the Econometric Model Manager for the New England Economic Project for the past 13 years.

Jeff holds an M.S. degree in Agricultural Economics and a B.S. Degree in Animal Sciences from the University of Vermont. He is a member of the National Association of Business Economists, and currently serves as Vice Chair of the Essex Town, Vermont Selectboard. Jeff was born and raised in Hurley, NY.

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<sup>37</sup> Retrieved from <http://www.co.orange.ny.us/orgMain.asp?orgid=53&storyTypeID=&sid=&>, on 10/26/06

## APPENDIX J: TASK FORCE MEMBERS LISTING

Capital Group	Primary	Alternate
Natural	Jessica Barry	Andrea Kunlof
Physical	Adam Snyder	Toni Hokanson
Economic	Paul Hakim	Ken Davenport
Human	Chris Coccio	Martin Ruglis
Social	Carolyn Hansen	Jennifer Fuentes
Cultural	Paul Rakov	Sherri Brittain Connie Snyder

### Task Force Leadership Qualities

Actionable  
 Advocate  
 Character  
 Committed  
 Creative  
 Dynamic  
 Empathetic  
 Influential  
 Inspire action  
 Integrity  
 Listener  
 Loyal  
 Objective  
 Persuasive  
 Persuasive  
 Pragmatic  
 Risk-taker  
 Well-organized  
 Execute strategy  
 (personally and  
 through others)  
 Involved in cultural  
 community  
 Available and willing  
 Time to do the job

## Appendix K: “The Big Deal”

*The Big Deal*© is a community priority-setting tool developed by COPE to help diverse groups organize discussion and identify their most important issues for focus. It is generally part of a larger process and can be accomplished in as little as 1 hour. The activity brings together a diverse group of people, provides structured discussion and participation, and produces information that clearly identifies what participants believe is important for their community’s continued progress. *Big Deal* cards are designed with both pictures and text so that a variety of people with varying habits and abilities can easily understand information presented.

Customized, color-coded cards with issue-specific information were developed and categorized by Capital Groups (Natural, Physical, Economic, Human, Social, and Cultural Community groups) then used in a facilitated process to discuss outcomes and identify priorities both for outcomes within Capital Groups, and for Capital Groups overall. The result was a list of overall outcomes in priority order, a list of the #1 ranked outcome in each Capital Group, and a list of ranked Capital Groups.

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## Appendix M: Public Forum Addendum

The Steering Committee held a Public Forum on March 7, 2007. The Forum consisted of a Gallery Walk of the Inventory of Strategies, a presentation of the Ulster County Strategic Economic Development Plan, a question and answer period, and open discussions. Over 200 people attended the Forum.

This addendum focuses on comments made during the open discussions and materials provided subsequent to the Forum. The addendum lists volunteers, additional key observations, and links to newspaper articles covering the Forum.

### Volunteers

Robert Baum (rbaum@hvi.net)  
Frank Flynn (frank@frankflynnCPA.com)  
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Cheryl Schneider, 331-1111, Cheryl@themacworks.com  
Ron Stonitsch, 331-8920 x 3004 (Workforce Development-may be in database)  
Shelly Zimble (shelzanne@aol.com)

### Additional Key Observations

The following key observations were added based on focus group conversations and comments expressed during Public Forum.

The NYC Metropolitan Area connection offers Ulster County access to global markets, intellectual capital, and is relied on by tourism and arts and culture businesses.

The creative class has migrated to Ulster County, forming its own “cluster”. This has implications for long term competitive advantages - *those who continue to create continue to succeed* - as well as the importance of quality of life as an economic development factor.

Access to centers of excellence in higher education within the Mid-Hudson Valley and Ulster County has significant potential to create synergies with businesses. This access also helps to attract and create a workforce with lifelong learning goals able to develop flexible skills and capabilities, and a self-confidence that is open to innovation and change.

Our aging population and retirees is an important asset: they have expertise, financial resources, and are willing to contribute and volunteer.

Ulster County has a higher percentage of small businesses than any county in the region. Understanding the challenges and potential of these businesses is essential to our economic growth.

Ulster County has adequate critical infrastructure (water/sewer/transportation) to support growth in many of its central places. Working with local communities to understand how to best utilize this public investment offers the opportunity to meet many of our economic goals.

## Links to Articles

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