



Fulton County - A Posi+ive Place to Be.

PROFILE: FULTON COUNTY, NY

August 2017

Fulton County NY
POSITIVE

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Executive Summary

FULTON COUNTY'S VISION

Fulton County has a vision for where it wants to be in 2026.

Fulton County – A Posi+ive place to be.

By 2026, Fulton County, New York is POSI+IVE it will be a premier place to invest, work, start a business, own a home, raise a family, vacation and retire. Our quality of life, vibrant atmosphere, healthy lifestyles, friendly neighborhoods and scenic lakefronts will appeal to young people, families, empty-nesters, artists, entrepreneurs, local employees and downtown professionals. Fulton County will continue to be a place where one can take a 180 degree turn away from a high cost and high stress way of life toward a relaxing lifestyle with a reasonable cost of living, quality housing and well-paying jobs. Our 44 lakes, featuring the Great Sacandaga Lake, our memorable Adirondack vistas, Mohawk Valley history and diverse four-season recreational opportunities will appeal to residents and be destinations for visitors.

The Cities of Gloversville and Johnstown will be safe, welcoming and energetic places, alive with restaurants, shops, galleries, museums and entertainment venues, parks and farmer's markets. We will live, work and enjoy life together along bustling streets lined with preserved historic buildings with magnificent architecture that offer a variety of reasonably priced housing for residents of all ages, abilities and incomes. Outside of the cities, our towns, villages and hamlets will represent all that is good about "small town America," boasting convenient community centers and neighborhoods that are compact and walkable.

Fulton County will remain a close-knit and connected community with a deep personal stake in our excellent schools, accessible health care, community services and well-maintained public infrastructure. Our dedicated community leaders will work cooperatively to create sustainable revenue streams that keep our County affordable, promote an enviable quality of life, encourage investment, create jobs and fuel positive change.

Named after the famed inventor Robert Fulton, the County will continue its proud history of making and growing things people need. Our diverse economy, with a globally competitive workforce and creative-economy talent, will speed innovation, expand technology, leverage private capital, and engage higher education. Strategic Development Areas have spurred housing and retail growth, while local farms and agribusinesses drive a thriving agricultural economy. Our abundant water and wastewater capacities promote Fulton County as a smart place to invest.

Fulton County will be the place every other place wants to be.

FULTON COUNTY'S DEVELOPMENT STRATEGY

Fulton County has a strategy to achieve its Vision. The Strategy has three goals:

1. Promote Fulton County as an extraordinary place to live with an enviable quality of life.
2. Build a strong economy and tax base.
3. Create healthy communities connected to nature.

FULTON COUNTY'S STRATEGIC LOCATION

Fulton County:

- Is located within four hours of 20% of the United States' population including New York City, Boston, Hartford, Philadelphia, Buffalo and major Canadian markets including Montreal and Toronto.
- Is located within NY's Technology Triangle, a Nanoelectronics hotspot formed by Globalfoundries to the east, SUNY Poly College of Nanoscale Science and Engineering to the south and Marcy Nanocenter to the west.
- Has quick and easy access to four major Interstate Highways: I-90, I-87, I-88 and I-81.
- Has convenient access to tourist, recreational, historic, art and cultural resources in the Region.
- Is a short drive to major employers in the Region including Globalfoundries, SUNY Poly College of Nanoscale Science and Engineering, General Electric and others.

FULTON COUNTY'S ATTRACTIVE QUALITY OF LIFE

Fulton County is a place where one takes a 180° turn away from a high-stress way of life.

- Fulton County has world class year-round recreational opportunities: 44 lakes including the Great Sacandaga Lake, fishing, hiking, camping, boating, downhill skiing, cross country skiing, snowshoeing and snowmobiling.
- 55% of Fulton County, or 180,000+/- acres, lies within the Adirondack State Park which features world renowned hiking, fishing, hunting and other outdoor recreational opportunities.
- Fulton County has:
 - Lowest cost of living in Region.
 - Low crime rates.
 - Assortment of historic, heritage and cultural offerings.
- Fulton County has quality housing at reasonable prices.
- Fulton County is easily accessible to renowned recreational assets in the Region including the Baseball Hall of Fame, Saratoga Race Track, Rivers Casino, Palace Theater and many others.
- The Cities of Gloversville and Johnstown have a strong inventory of architecturally significant buildings available to transform into housing, retail and mixed use developments.

PRIMARY DEVELOPMENT AREAS

- Fulton County has three Primary Development Areas (PDA) totaling almost 1,000 acres of land primed for development. Each PDA consists of a tract of land planned and endorsed by local communities for Smart development.
- The three PDA's are:

Primary Development Area

1. Hales Mills Development Area
2. Vail Mills Development Area
3. Tryon Development Area

Municipality

Town of Johnstown
Town of Mayfield
Town of Perth

- Development Concept Plans for each Development Area identify a mixture of housing, commercial, retail, recreational and mixed use types of development.
- All three PDA's are ready to be developed, supported at the local level and are properly zoned.
- Fulton County's 2017 Housing and Retail Strategies document a demand for new housing and retail in each Development Area.

FULTON COUNTY'S TRAINED AND EDUCATED WORKFORCE

- The Region's workforce totals nearly approximately 500,000. This workforce, which spans nine (9) counties, includes workers within 45-minute drive.
- Average annual wage in Region is \$43,000.
- Average commuting time is 23.4 minutes.
- Fulton-Montgomery Community College (FMCC) offers tailored training to provide local companies with skilled workers.
- Two Pathways in Technology (PTECH) Programs serve Fulton County. These PTECH schools, which are new models for secondary educations, train students in business management, advanced manufacturing, information technology and health science. Upon graduating from these PTECH Programs with Associates Degrees, these graduates represent another source of trained, skilled labor for businesses in the Region.
- There are 15 colleges and universities in the Region that continually supply trained workers for local companies.

FULTON COUNTY'S STRONG ECONOMY

- Fulton County has a diversified economy featuring companies like FAGE USA, Benjamin Moore, Walmart Food Distribution Center, Crystal Geyser, Taylor Made Products, EPIMED and many others.
- Office/industrial/commercial land values and rents are highly competitive when compared to other regions in New York State.
- High quality, professionally managed municipal infrastructure systems exist in Fulton County. These systems have excess capacities that are available to support and promote new growth and development.
- Tryon Technology Park offers shovel-ready sites to attract new businesses into Fulton County.

- Targeted Industry Analysis for Tryon Technology Park identified seven Industry Clusters that would be ideal for Tryon:
 - Biomedical Research and Development
 - Food and Beverage
 - Health Care Products and Services
 - Headquarters and Business Services
 - Software and Media
 - Electronics
 - Renewable Energy
- Local governments utilize an expedited (1-2 month) process to secure local approvals.
- The purchasing power of County residents is growing evidenced by median household incomes rising 10% between 2010 and 2014.
- A 2017 Retail Strategy documented the demand for nearly 400,000 sq. ft. of new retail development opportunities in the County.



Photo courtesy of CRG.

FAGE, LLC is one of the many companies that contributes to the diverse economy in Fulton County.

I. INTRODUCTION

This County Profile provides a snapshot of Fulton County's people, homes, economy, and opportunities.

About Fulton County

Fulton County is a premier place to live, visit, and work in upstate New York. The County is renowned for its attractive quality of life, beautiful rural landscapes, charming communities, historic cities and popular recreation destinations, including Great Sacandaga Lake, a top attraction in the Region. Fulton County is located within New York's "Technology Triangle" formed by GlobalFoundries to the east, SUNY Poly College of Nanoscale Science and Engineering to the south and Marcy Nanocenter at SUNY Polytechnic Institute to the west. It offers diverse well-paying jobs and a high-quality, low-cost small-town lifestyle.

Growing Population with Rising Incomes: The County population is projected to grow 3% by 2020. Median household income rose ten percent to \$55,550 between 2010 and 2014.

Attractive Cost of Living and Rising Home Values: The current market demand for new homes and apartments is over 560. This demand could increase with successful County economic development efforts. High quality of life, access to world class recreation and expanding job opportunities support steadily increasing home values making them more accessible than surrounding counties.

Expansive and Well Educated Regional Workforce: The regional labor pool totals approximately 500,000 workers and includes nine counties (**Albany, Fulton, Hamilton, Herkimer, Montgomery, Otsego, Saratoga, Schenectady and Schoharie.**) This nine-county region has over 23,000 establishments with annual payroll of nearly \$15.5 billion providing an average annual wage of just over \$43,000.

Nearly 45% of workers are college graduates. Fifteen colleges and universities are within commuting distance of Fulton County. Fulton Montgomery Community College (FMCC) offers tailor-made training and is a source of skilled workers for local companies.

Recent economic research projects private sector employment growth of 65,500 jobs in the regional labor market between 2010 and 2020. U.S. Census projections show the labor pool growing by approximately 700 jobs by 2020 in Fulton County.

Fulton County Regional Labor Market	
45 Mile Radius Includes: Albany, Fulton, Hamilton, Herkimer, Montgomery, Otsego, Saratoga, Schenectady and Schoharie Counties (2015) (Rounded)	
Population	781,000
Employed Labor Force	463,000
Unemployed Labor Force	35,150
Unemployment Rate	4.50%
% College Graduates	45%
% Graduate Degrees	15%
Mean travel time to work (mins)	24
Median Annual Wage/Hour	\$21.00

Competitive and Growing Economy: Healthcare is the largest industry in Fulton County. There also exists a strong and growing manufacturing base of nearly 70 businesses.

Diverse Development Opportunities: Reasonable cost of living, low crime rates, affordable commercial rents and land prices are competitive advantages of living and doing business in Fulton County. There is current market support for over 400,000 SF of new retail. Primary Development Areas in the Towns of Johnstown, Mayfield and Perth and shovel-ready sites are served by strong infrastructure and transportation networks. Gloversville and Johnstown's walkable and historic downtowns offer unique spaces for new shops and housing. Recent downtown successes like downtown Wi-Fi, Mohawk Harvest, loft conversions in Gloversville and a hotel conversion in Johnstown illustrate the investment opportunities available in both downtowns.



Fulton Montgomery Community College (FMCC) is a source of skilled workers for local companies.

Photo courtesy of livability.com

II. FULTON COUNTY'S DEVELOPMENT STRATEGY

Key Takeaways:

Fulton County has a strategy to achieve its Vision. The Strategy has three goals:

- 1. Promote Fulton County as an extraordinary place to live with an enviable quality of life.*
- 2. Build a strong economy and tax base.*
- 3. Create healthy communities connected to nature.*

Fulton County's 2017 Development Strategy marks an important point in a five-year process initiated in 2013 by the Fulton County Board of Supervisors to "jump start" private sector investment in Fulton County. Jump Start Fulton County's goal was to expand revenues and the tax base. Key components:

- Tryon Technology Park
- SMART Waters
- Fulton County Positive Branding
- Shovel-Ready Sites
- Marketing videos

The Development Strategy brings together these initiatives with independent professional assessment of the County's housing and retail markets.



Tryon Technology Park in the Town of Perth is a key component of the Fulton County Development Strategy.

The Development Strategy is guided by Fulton County's Vision:

Fulton County – A Posi+ive place to be.

By 2026, Fulton County, New York is POSI+IVE it will be a premier place to invest, work, start a business, own a home, raise a family, vacation and retire. Our quality of life, vibrant atmosphere, healthy lifestyles, friendly neighborhoods and scenic lakefronts will appeal to young people, families, empty-nesters, artists, entrepreneurs, local employees and downtown professionals. Fulton County will continue to be a place where one can take a 180 degree turn away from a high cost and high stress way of life toward a relaxing lifestyle with a reasonable cost of living, quality housing and well-paying jobs. Our 44 lakes, featuring the Great Sacandaga Lake, our memorable Adirondack vistas, Mohawk Valley history and diverse four-season recreational opportunities will appeal to residents and be destinations for visitors.

The Cities of Gloversville and Johnstown will be safe, welcoming and energetic places, alive with restaurants, shops, galleries, museums and entertainment venues, parks and farmer's markets. We will live, work and enjoy life together along bustling streets lined with preserved historic buildings with magnificent architecture that offer a variety of reasonably priced housing for residents of all ages, abilities and incomes. Outside of the cities, our towns, villages and hamlets will represent all that is good about "small town America," boasting convenient community centers and neighborhoods that are compact and walkable.

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Named after the famed inventor Robert Fulton, the County will continue its proud history of making and growing things people need. Our diverse economy, with a globally competitive workforce and creative-economy talent, will speed innovation, expand technology, leverage private capital, and engage higher education. Strategic Development Areas have spurred housing and retail growth, while local farms and agri-businesses drive a thriving agricultural economy. Our abundant water and wastewater capacities promote Fulton County as a smart place to invest.

Fulton County will be the place every other place wants to be.

III. FULTON COUNTY'S STRATEGIC LOCATION

Key Takeaways:

Fulton County:

- Is located within six hours of 20% of the United States' population including New York City, Boston, Hartford, Philadelphia, Buffalo and major Canadian markets including Montreal.
- Is located within NY's Technology Triangle, a Nanoelectronics hotbed formed by Globalfoundries to the east, SUNY Poly College of Nanoscale Science and Engineering to the south and Marcy Nanocenter to the west.
- Has quick and easy access to four major Interstate Highways: I-90, I-87, I-88 and I-81.
- Has convenient access to tourist, recreational, historic, art and cultural resources in the Region.
- Is a short drive to major employers in the Region including Globalfoundries, SUNY Poly College of Nanoscale Science and Engineering, General Electric and others.

Strategic Location

Fulton County is located between important upstate metropolitan areas in the Capital Region and Utica-Rome. Numerous highway connections including the New York State Thruway and Adirondack Northway put major urban markets within four hours of Fulton County. The Albany International Airport and Port of Albany are under an hour away. Approximately 65 million people can be served within a four-hour travel time, or the standard 300-mile "just-in-time-delivery" radius.

Approximately 20% of the U.S. population can be served within a four-hour travel radius, or the standard 300-mile "just-in-time-delivery" radius.

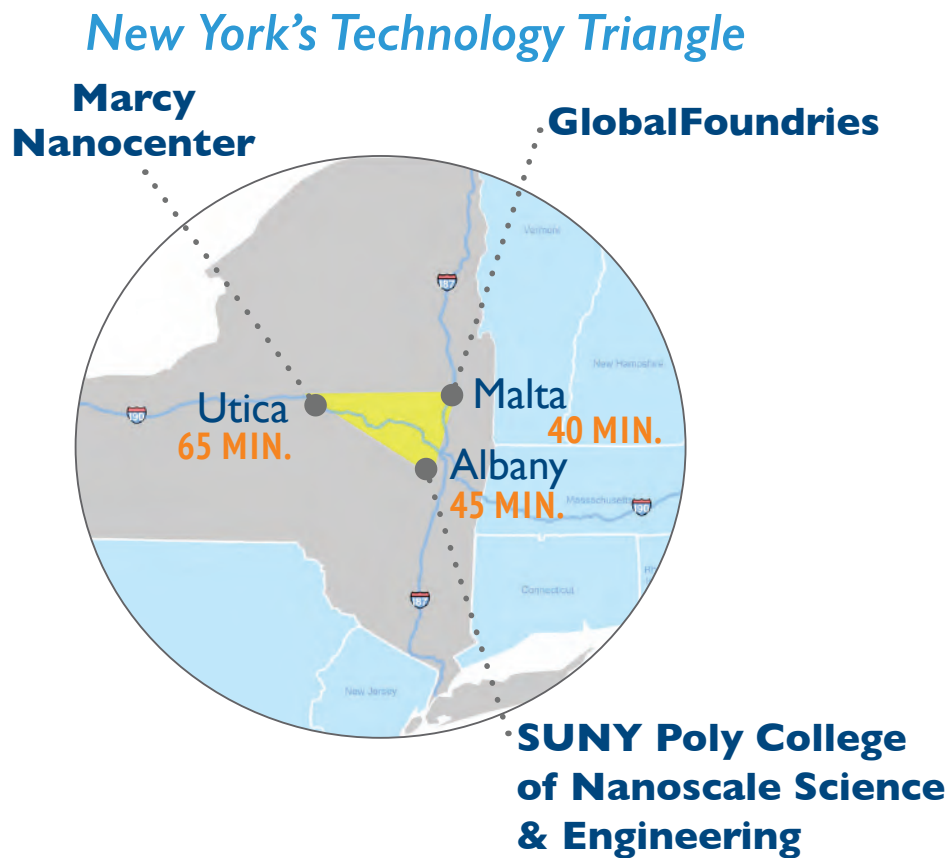
Fulton County Strategic Location			
City (metro area)	Distance (miles)	Drive Time (hours)	Population
Albany, NY	40	0.75	870,000
Utica-Rome, NY	50	1	300,000
Syracuse, NY	100	1.75	660,000
Rochester, NY	180	3	1,150,000
New York City, NY	200	3.75	20,200,000
Montreal, QC	210	3.75	4,060,000
Boston, MA	225	3.5	4,800,000
Buffalo, NY	245	3.75	1,100,000
Philadelphia, PA	250	5	6,000,000
Toronto, ON	340	5.25	6,600,000
Total			45,740,000

The County's world-class recreational assets are within a four-hour drive of millions of people, including the urban markets of New York City, Montreal, Boston, and Philadelphia.

New York State Technology Triangle

Fulton County is located within New York's "Technology Triangle" formed by GlobalFoundries to the east, SUNY Poly College of Nanoscale Science and Engineering to the south and Marcy Nanocenter at SUNY Polytechnic Institute to the west.

GlobalFoundries, an international semiconductor foundry that manufactures integrated circuits for semiconductor companies, has invested over \$14 billion into its Fab 8 facility in Malta, NY, and employs over 3,000 workers. The Nano Utica Initiative at SUNY POLY is a \$1.5 billion economic development initiative to create the world's largest shovel-ready semiconductor site.



IV. FULTON COUNTY'S ATTRACTIVE QUALITY OF LIFE

Key Takeaways:

Fulton County is a place where one takes a 180° turn away from a high-stress way of life.

- *Fulton County has world class year-round recreational opportunities: 44 lakes including the Great Sacandaga Lake, fishing, hiking, camping, boating, downhill skiing, cross country skiing, snowshoeing and snowmobiling.*
- *Nearly 60% of Fulton County, or 180,000+/- acres, lies within the Adirondack State Park which features world renowned hiking, fishing, hunting and other outdoor recreational opportunities.*
- *Fulton County has:*
 - *World class year-round recreational facilities.*
 - *Lowest cost of living in Region.*
 - *Low crime rates.*
 - *Assortment of historic, heritage and cultural offerings.*
 - *Quality housing at reasonable prices.*
- *Fulton County is easily accessible to numerous recreational assets in the Region including the Baseball Hall of Fame, Saratoga Race Track, Rivers Casino, Palace Theater and many others.*
- *The Cities of Gloversville and Johnstown have a strong inventory of architecturally significant buildings available to transform into housing, retail and mixed use developments.*

Quality of Life

The County's enviable quality of life, world class recreational assets and housing and retail choices make it an attractive location for new residents, workers and visitors. An area's quality of life is a key determinant in business location decisions. According to Sperling's Best Places, Fulton County has the lowest cost of living compared to surrounding counties, making it an attractive place to live and a great place to buy a home.

Nearly 60% of the Fulton County falls within the Adirondack Park - with an international reputation as a recreation destination appealing to residents and visitors attracted to unrivaled hiking, fishing, hunting, snowmobiling, boating and other activities.

Fulton County is home to 44 lakes including The Great Sacandaga Lake measuring over 29 miles long and six miles wide. A rich history and assortment of heritage and cultural offerings including historic sites, art galleries, community theatre groups, and civic bands offer concerts, lectures, workshops and artist receptions. The FJ&G Rail Trail provides almost 10 miles of off-road multi-use recreation linking the cities.

VISION



Fulton County used to be known as the Leather/Glove Making Capital of the World. It was home to a thriving leather tanning and glove industry, centered in the City of Gloversville, for over 200 years. Like many other industrial cities, Fulton County's leather manufacturing businesses shifted jobs overseas and employment gradually declined from 13,000 jobs in 1950 to approximately 330 today.¹

Through major public investments into infrastructure, shovel ready sites, wide reaching economic development programs and professional marketing, Fulton County reinvented itself with a broad, sustainable economy. The County is now home to a diversified group of employers including:

- Benjamin Moore Paints
- EPIMED
- FAGE USA Yogurt
- Euphrates Cheese
- Crystal Geyser Water
- Walmart Food Distribution Center
- DHL Logistics

Cost of Living Index by County	
County	Cost of Living
Fulton	93
Montgomery	94
Oneida	94
Schoharie	99
Schenectady	100
Washington	103
Hamilton	107
Rensselaer	107
Albany	108
Warren	109
Saratoga	116
United States Overall = 100	
Source: http://www.bestplaces.net	

Recreational Assets

The following recreational facilities are within a one-hour drive of Fulton County:

- **Beaches:** Numerous riverside and lakeside beaches along the County's 44 lakes including the 29-mile long Great Sacandaga Lake.
- **Boating:** The County's 44 lakes, Lake George, the Hudson and Mohawk Rivers and Champlain Canal.
- **Cross Country Skiing:** Numerous trails, Lapland Lake.
- **Downhill Skiing:** Royal Mountain in Fulton County.
- **Fishing:** Nationally recognized trout streams.
- **Hunting:** Access to large tracts of Adirondack Park and other property.
- **Horse Racing:** Saratoga's world famous thoroughbred racing, world-class polo matches, and Casino & Raceway features harness racing, gaming and a nightclub.
- **Motocross Racing:** Exciting opportunities at Royal Mountain.
- **Polo:** World-class polo matches at Saratoga Polo.
- **Hiking and Biking:** Wooded and mountain trails across the Region including the paved FJ&G Rail Trail.
- **NY State Parks:** The Region's 11 unique state parks include Saratoga Spa State Park, which features a performing arts center, an historic hotel, a luxurious spa, and nature trails to bubbling mineral springs. Other parks offer ice-skating, ice-fishing, snowshoeing, cross-country skiing and snowmobiling.
- **Scenic Byways:** The historic Erie Canal on the Mohawk Towpath Scenic Byway connects to the 365-mile Canalway Trail. The Adirondack Trail Scenic Byway travels north and south through Fulton County.

¹ U.S. Census Bureau County Business Patterns (2014).

Art, Cultural and Historic Assets

- Arkell Museum (Canajoharie)
- The Arts Center of the Capital Region (Troy)
- The Colonial Little Theater (Johnstown)
- Empire State Plaza & The Egg (Albany)
- Glove Performing Arts Center (Gloversville)
- New York State Capital and Museum (Albany)
- The Palace Theater (Schenectady)
- Proctors Theater (Schenectady)
- Saratoga Performing Arts Center (Saratoga)

History

- Empire State Plaza Vietnam War Memorial, WWII Memorial and Women Veterans Memorials (Albany)
- Elizabeth Cady Stanton Homestead (Johnstown)
- Fulton County Courthouse (Johnstown)
- National Museum of Racing & Hall of Fame (Saratoga)
- New York State Military Museum (Saratoga)
- Saratoga National Historical Park (Stillwater)
- Schenectady's Stockade District (Schenectady)
- Johnson Hall State Historic Site (Johnstown)



The Glove Performing Arts Center in Gloversville, NY.

V. PRIMARY DEVELOPMENT AREAS

Key Takeaways

- *Fulton County's Development Strategy recommends the creation of three Primary Development Areas (PDA). Each PDA is a tract of land planned and endorsed by local communities for Smart development.*
- *The three PDA's are:*
 - *Hales Mills Development Area: Town of Johnstown*
 - *Vail Mills Development Area: Town of Mayfield*
 - *Tryon Development Area: Town of Perth*
- *Development Concept Plans for each Development Area identify a mixture of housing, commercial, retail, recreational and mixed use types of development.*
- *All three PDA's are ready to be developed, supported at the local level and are properly zoned.*

Hales Mills Development Area

The 490 +/- acre Hales Mills Development Area is envisioned as a vibrant, walkable and accessible neighborhood featuring housing, retail, commerce and recreational opportunities in a picturesque environment.

Highlights

Site Summary	
Location	Hales Mills Road Extension & NYS Route 29
Municipality	Town of Johnstown
Size	490 +/- Acres total
# Parcels	4 Parcels/2 Property Owners
Site Condition	Vacant
Zoning	Hales Mills Development District
Utilities	Water, Sewer, Electricity, Natural Gas, & Broadband
Traffic Counts	AADT of 2,500 on Hales Mill Rd. Ext. & 6300 on NYS Route 29

- Pro-development community.
- Development concept has been endorsed by Planning and Town Boards. [Boards will consider alternate concepts].
- New water and sewer infrastructure installed along Hales Mills Road Extension to support Development Area.
- Documented market demand for new housing and retail.

Development Concept

The Development Concept includes shops, offices and restaurants mixed in with single-family homes, market-rate apartments and townhouses as well as senior housing to attract a growing number of retirees, all adjacent to a planned 72-acre public park with walking trails.

Site Features

- Close proximity to year-round, world-class outdoor recreation opportunities, including boating, fishing, golfing, hunting, swimming, camping, downhill and cross-country skiing, snowshoeing, snowmobiling, snowboarding, motocross racing, horseback riding and more.
- Highly visible site with prime and easily developable land featuring beautiful vistas.
- All uses identified in the Development Concept are permitted in Town's Zoning Ordinance.
- Adjacent to Hales Mills Country Club; a premier 18-hole golf course and a short drive to six other golf courses in Fulton County.
- Short drive to a modern YMCA with recreational services and programs for all ages.

Hales Mills Development Area	
Development Concept	Opportunities
Retail Space	160,000 SF
Commercial, Office & Service Space	210,000 SF
Single-Family Homes	145 Homes
Townhomes	40 Homes
Family Apartments	275 Apartments
Senior Apartments	80 Apartments
Greenspace and Parks	72 Acres
On-Site Trail System with Community Links	2 miles

Vail Mills Development Area

The Vail Mills Development Area offers premier opportunities for infill development in the hamlet of Vail Mills located at the intersection of NYS Routes 29 and 30; a key gateway to the Great Sacandaga Lake and the Adirondack State Park. Vail Mills is adjacent to the historic Village of Broadalbin in scenic Fulton County, NY. As a "Gateway to the Adirondacks" the Vail Mills Development Area is witness to over 10,000 average daily traffic volumes. The development area includes several successful businesses and a rail trail, a proposed park and a canoe launch at Kenneyetto Creek. The community-supported plan for the numerous development sites includes new single-family housing, a commercial/retail district and lodging in a pastoral setting.

Site Summary	
Location	Intersection of State Highways 29 and 30
Municipality	Town of Mayfield
Size	Multiple Sites Available
# Parcels	Approximately 16
Site Condition	Vacant Land Requiring Minimal Site Preparation.
Zoning	Existing Zoning Supports Concept Vision
Utilities	Water, Sewer (planned), Electricity, Natural Gas, & Broadband
Traffic Counts	AADT of 10,700 on NYS Route 30 & 8,000-9,000 on NYS Route 29

Highlights

- Multiple prime development sites at strategic crossroads of two state highways.
- Strong public support for a concept plan agreed to by both Town and County.
- Opportunity to build in successful commercial corridor that includes a regional Harley Davidson Dealership.
- Planned infrastructure investments to support development.
- Established market demand for new housing and retail.
- Excellent location along major tourism route to the Great Sacandaga Lake and the Adirondack Park.

Development Concept

The Development Concept features a vibrant community center with a mix of single-family homes, senior apartments and lodging for those frequenting the Adirondack State Park and other tourists, all within walking distance of shops, restaurants, recreational amenities including a proposed park with canoe launch on the Kenneyto Creek and Rail Trail access, and a tourism node with visitor center and other services.

Vail Mills Development Area	
Development Concept	Opportunities
Retail Space	130,000 SF
Commercial/Service/Office Space	132,000 SF
Single-Family Homes	47 Homes
Senior Apartments	100 Senior Apartments
Greenspace and Parks	4-acre Park with Access to Canoeable Water
Other Amenities	72-Unit Hotel, Farmer's Market Building, Trail System with Community Links

Site Features

- High visibility commercial development sites available on NYS Route 29 and 30.
- Development-ready zoning.
- Restaurants within walking distance of development sites.
- Planned public park with trail system, open space, and canoe launch.
- Less than two miles to historic downtown Broadalbin's shops and restaurants and under 6 miles to the City of Amsterdam's commercial center.
- Close proximity to year-round, world-class outdoor recreation opportunities, including boating, fishing, hunting, swimming, camping, downhill and cross-country skiing, snowshoeing, snowmobiling, snowboarding, motocross racing, horseback riding and more.
- Fonda, Johnstown & Gloversville (FJ&G) Rail Trail's ten miles of multi-use trail.

Tryon Development Area

The Tryon Development Area is a 100+/- acre tract of land owned by the Fulton County Industrial Development Agency. This prime tract of land is immediately available for sale and development. This picturesque site with beautiful vistas is an attractive location for various types of housing.

Site Summary	
Location	CR 158 - ½ mile off NYS Route 29
Municipality	Town of Perth
Size	100 +/- Acres
# Parcels	1
Site Condition	Vacant
Zoning	Business and Technology
Utilities	Water, Sewer, Gas, and Electric
Traffic Counts	AADT of 1674 on County Route 158 (2015); AADT of 7507 on NYS Route 29

Highlights

- The land is owned by the IDA and is currently available.
- Infrastructure onsite.
- Strong public support for the Concept Plan by both Town and County.
- Established market demand for new housing and retail.
- Quiet, picturesque setting with beautiful vistas.

Development Concept

The Development Concept features both single-family housing, townhomes and apartments with a mixture of commercial and retail uses in a scenic setting. Being ½ mile off NYS Route 29, the Development Area is 5 minutes from downtown Gloversville and Johnstown and 30 minutes to downtown Saratoga.

Tryon Park Development Concept	Opportunities
Retail	20,000 SF
Professional Office	20,000 - 40,000 SF
Single-Family Homes	32
Townhomes	12
Family Apartments	34

Site Features

- Picturesque setting with larger lots available for upscale housing.
- Land is currently available for sale.
- Water, sewer, gas and electricity onsite.
- Scenic vistas.

VI. FULTON COUNTY'S TRAINED AND EDUCATED WORKFORCE

Key Takeaways

- Region's workforce totals approximately 500,000. This workforce, which spans nine counties, includes workers within 45-minute drive.
- Average annual wage in Region is \$43,000.
- Average commuting time is 23.4 minutes.
- Fulton-Montgomery Community College (FMCC) offers tailored training to provide local companies with skilled workers.
- Two new Pathways in Technology (PTECH) Programs serve Fulton County. These PTECH schools, which are new models for secondary educations, are training students in business management, advanced manufacturing, information technology and health science. Upon graduating from these PTECH Programs with Associates Degrees, these students will represent another source of trained, skilled labor for businesses in the Region.
- There are 15 colleges and universities in Region that continually supply trained workers for local companies.

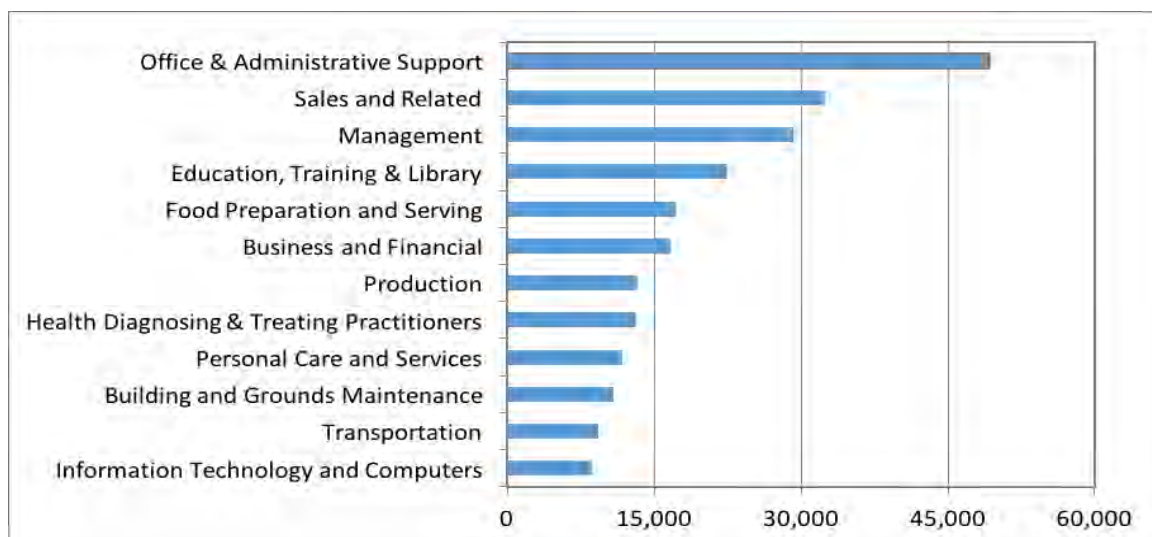
Workforce

Fulton County employers draw workers within a 45-minute commuting distance that includes Albany, Schenectady, Saratoga Springs and other population centers. This workforce offers an above average number of:

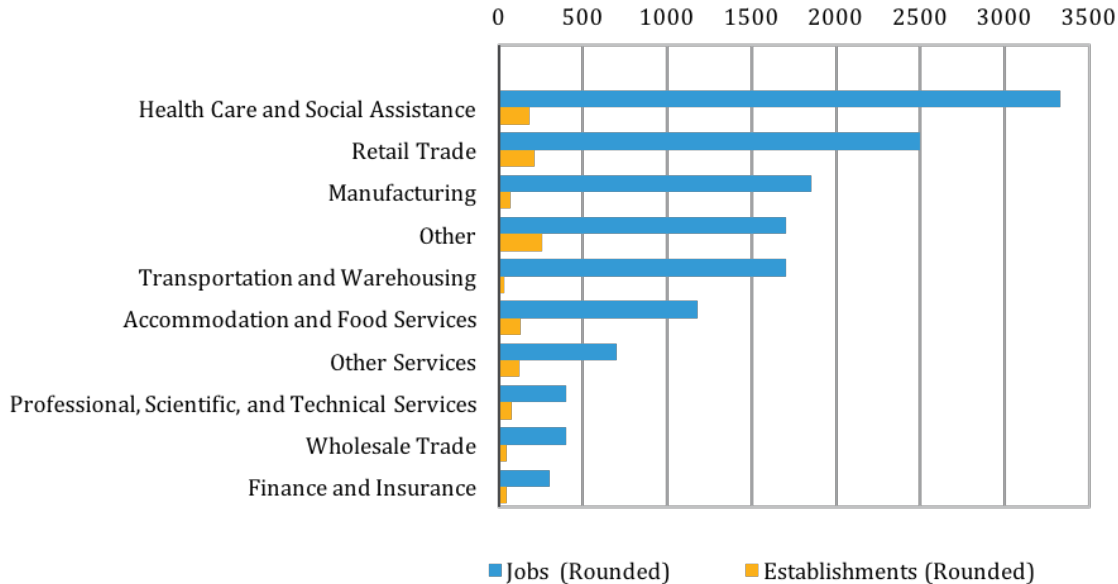
- younger job seekers
- executive age workers
- pre-retiree workers

Over 90% of the County's population drive their vehicles to work. The average commuting time is 23.4 minutes (one way). One-fifth of all workers living in Fulton County travel over 35 minutes with 16% traveling over 45 minutes.

Top 10 Occupations in the Region by Employment



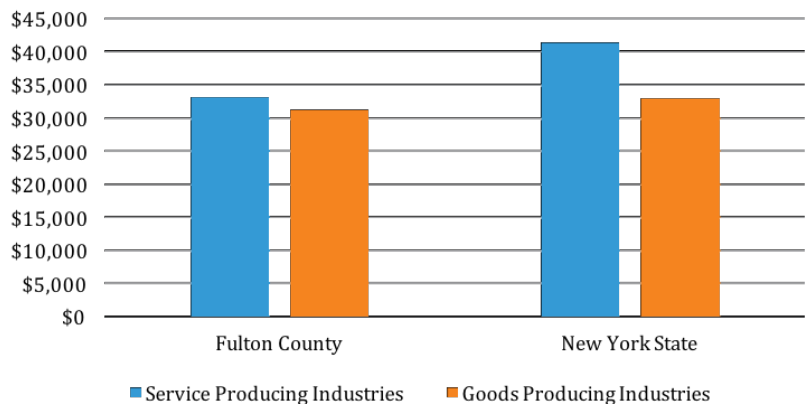
Employment by Industry 2014



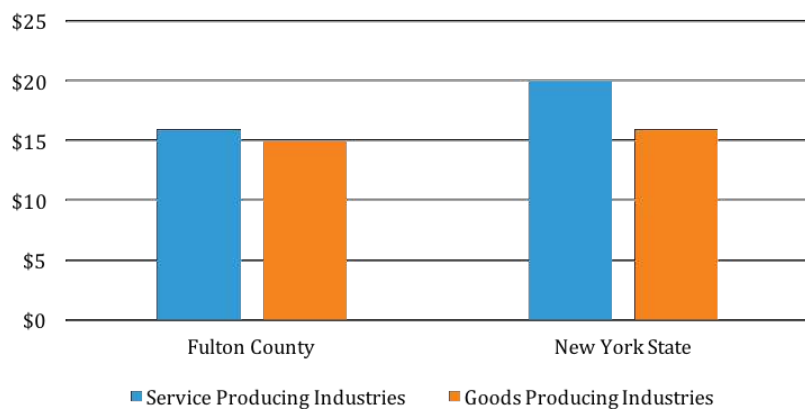
Median Wages

Employers in Fulton County offer competitive wages for both goods and service producing jobs. The median annual salary is \$31,200 in service producing industries and \$33,200 in goods producing industries. This equates to retail buying power of approximately \$11,000 per person. In this range, two wage earner families can purchase a home valued at between \$120,000 and \$190,000, significantly beyond the median home value countywide of \$108,000. New industries targeted by the County offer an average annual wage estimated at \$43,000. At that level, a two-wage earner household could afford a home between \$172,000 and \$258,000.

Median Annual Salary by Industry*



Median Hourly Wage by Industry*



Education

Fulton Montgomery Community College is a force behind improving educational attainment in the Region and a draw for the Fulton County students seeking their Associates Degree. With 3,000 students and 40 degree and certificate programs including IT related programs, numerous health care degrees, a new clean-room, automated manufacturing lab, and high-tech patient simulators, FMCC develops tailor made programs to train students in high tech fields.

Within a one-hour drive of Fulton County are fifteen colleges and universities and five community colleges, including the College of Nanoscale Science & Engineering, Rensselaer Polytechnic Institute (RPI), SUNY Albany, and the Albany College of Pharmacy & Health Sciences. These renowned colleges and universities provide trained and skilled labor to businesses in the Region.

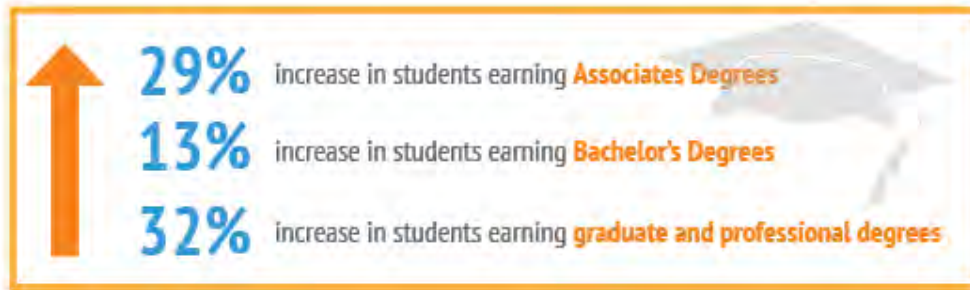
The Hamilton-Fulton-Montgomery Board of Cooperative Educational Services (HFM-BOCES) currently operates two new Pathways in Technology Early College High School (PTECH) programs servicing Fulton County. PTECH is an innovative model for secondary education. Students enter PTECH in 9th grade and earn a Regents high school diploma as well as an Associate Degree from FMCC in 4-6 years. The following Associate Degrees can be earned:

- Business Accounting
- Business Administration
- Business Technology and Applications
- Electrical Technology
- Computer Information Systems
- Computer Networking
- Computer Technology
- Medical Administrative Studies
- Health Studies
- Radiologic Technology
- Agricultural Business
- Agricultural Science
- Agricultural Engineering Technology:
Power Machinery
- Animal Industry
- Biological Technology
- Culinary Arts
- Environmental Studies
- Fisheries and Wildlife Technologies
- Sustainable Crop Production

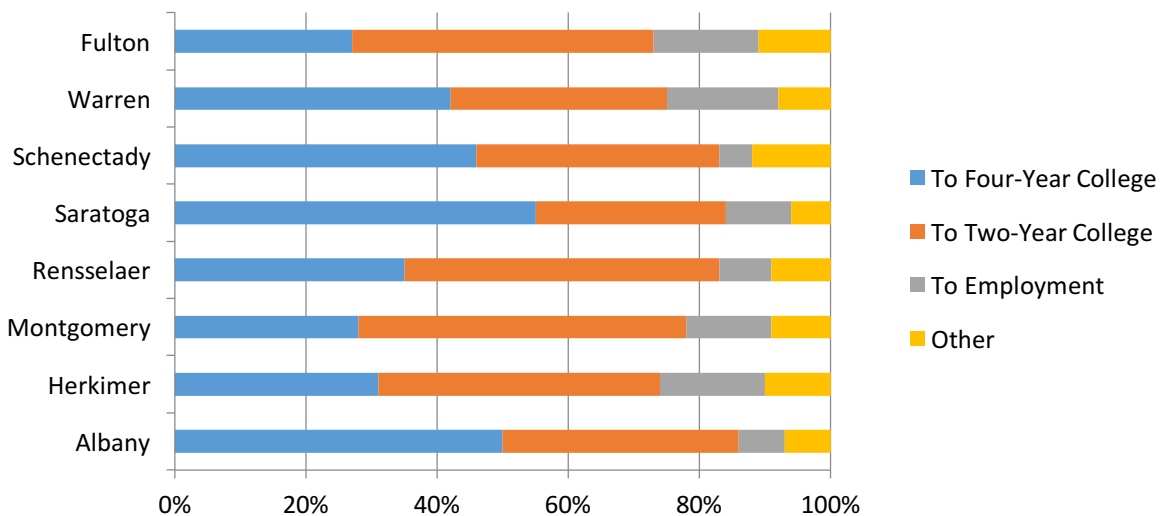
Students graduating from these PTECH programs represent another source of skilled and trained labor for local employers not available in many other areas of New York State that don't operate PTECH programs.

There is a strong consensus among County educators that while new companies are bringing more jobs with good salaries, students need more than the traditional high school diploma to enter a middleclass lifestyle. The need for post-secondary training is essential to earn a living wage.

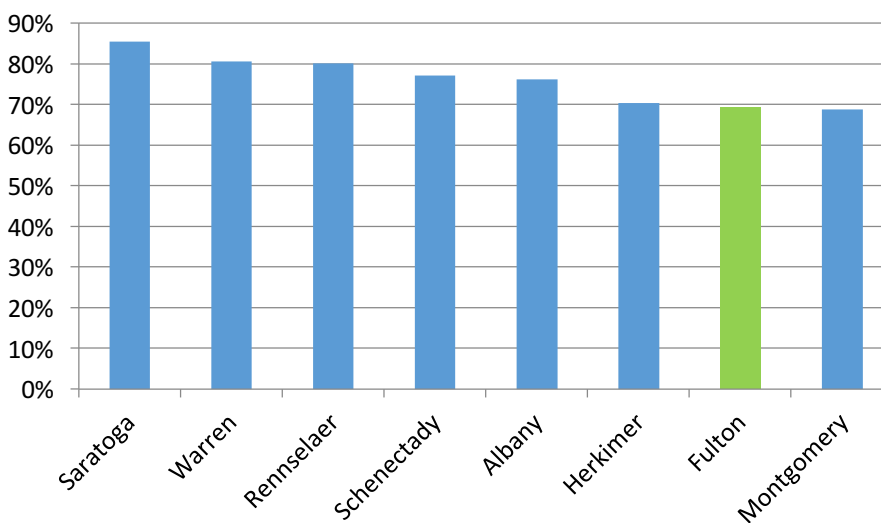
Among Fulton County residents over age 25, approximately 86% have graduated from high school (similar to the state average.) While only 16% have earned a Bachelor's degree or higher, although the rate of students pursuing higher education is steadily increasing (between 2000 and 2014):



High School Graduate Rates by County (2015-2016)



Average NYS Regents Exam Proficiency by County (10 Subjects) (2014-2015)



VII. FULTON COUNTY'S STRONG ECONOMY

Key Takeaways

- Fulton County has a diversified economy featuring companies like FAGE USA, Benjamin Moore, Walmart Food Distribution Center, Crystal Geyser, Taylor Made Products, EPIMED and many others.
- Office/industrial/commercial land values and rents are highly competitive when compared to other regions in New York State.
- High quality, professionally managed municipal infrastructure systems exist in Fulton County. These systems have excess capacities that are available to support and promote new growth and development.
- Tryon Technology Park offers shovel-ready sites to attract new businesses into Fulton County.
- Targeted Industry Analysis for Tryon Technology Park identified seven Industry Clusters that would be ideal for Tryon:
 - Biomedical Research and Development
 - Food and Beverage
 - Health Care Products and Services
 - Headquarters and Business Services
 - Software and Media
 - Electronics
 - Renewable Energy
- Local governments utilize an expedited (1-2 month) process to secure local approvals.
- The purchasing power of County residents is growing evidenced by the median household income rising 10% between 2010 -2014.
- A 2017 Retail Strategy documented the demand for nearly 400,000 SF of new retail development opportunities in the County by 2020.

Key Employers in Fulton County

Employer	Type
1. Lexington Center	1. Service provider to developmentally disabled.
2. Walmart Food Distribution Center	2. Food Distribution
3. Nathan Littauer Hospital	3. Health Care
4. FAGE USA	4. Yogurt Manufacturer
5. Benjamin Moore	5. Paint Manufacturer
6. DHL Logistics	6. Logistics
7. EPIMED	7. Medical Devices Manufacturer
8. Taylor Made Products	8. Boat Accessories Manufacturer
9. Townsend Leather	9. Upholstery Leather Manufacturer
10. Pioneer Windows	10. Aluminum Windows Manufacturer

Fulton County's Competitive Strengths

1. Great Place to Live and Raise a Family

- 180 degree turn from high cost – high stress way of life.
- Close-knit community.
- Small town environment.
- Lower cost of living compared to surrounding regions.
- Low crime rate.

2. Natural Beauty and Resources

- Easily accessible, year-round recreation opportunities and venues in Fulton County: swimming, boating, kayaking, canoeing, camping, hunting, downhill and cross country skiing, snowshoeing, snowmobiling, snowboarding, motocross racing, horseback riding and others.
- 5-10 minute drive to any of these recreational opportunities.
- 44 lakes including the Great Sacandaga Lake: 5th largest lake in New York State.
- 15-minute drive into Adirondack State Park from two cities.

3. Available and Affordable Buildings

- Available and affordable buildings for residential, office, manufacturing, high-tech, commercial and retail development.
- Buildings in downtown, just off downtown and elsewhere.

4. Expedited Local Permit/Approval Process

- County Planning Department serves as planning staff for City/Town Planning Boards.
- Expedited and predictable local approval processes.
- 30-60 day approvals for site plans including SEQR.

5. Strong Municipal Infrastructure Systems

- Nationally recognized Gloversville-Johnstown Joint Wastewater Treatment Plant (GJJWWTP).
- State of the Art Fulton County Landfill.
- Excellent water systems.
- Outstanding General Aviation Airport: Fulton County Airport.
- Countywide recycling program.

6. Pro-Development County

- Board of Supervisors' support and encourage growth and development.
- Strong political support for growth and development.

7. Competitive Office and Industrial Lease and Sale Rates

- As shown in the table below, Fulton County offers highly competitive lease and sale rates, compared to State averages:

Commercial & Industrial Lease and Sale Rates (2014)		
	Fulton-Montgomery Co. Region	New York State
Avg. Office Rent/SF	\$7.15	\$18.70
Avg. Industrial Rent/SF	\$3.17	\$7.25
Avg. Commercial/Industrial Land Price/Acre	\$26,800	\$62,000

Source: Targeted Industry Analysis: Tryon Technology Park

Key Industries: Tourism and Agriculture & Food Processing

Tourism

The County's scenic beauty and diverse recreational assets annually attract thousands of visitors. Tourism has long served as a staple industry, generating sales tax revenue and boosting small business. Fulton County Tourism reports that 63,000 visitors travel Route 29 each year. In 2015, the tourism industry in Fulton County directly and indirectly employed approximately 750 persons and generated approximately \$3.7 million in local taxes.

Agriculture and Food Processing

Approximately 220 farms on nearly 40,000 acres in Fulton County produce dairy products, fruit, vegetables, grain crops and livestock. Milk and other dairy products accounted for more than 60% of the region's agricultural sales in the Mohawk Valley counties (Fulton, Herkimer, Montgomery and Oneida) in 2010. Prime agricultural soils total approximately one-third of County acreage.

Fulton County's manufacturers, along with many farmer's markets and new food businesses like Mohawk Harvest in Gloversville, are developing the Region as a major food-processing hub. New employers such as feta cheesemaker Euphrates Inc. take advantage of the wealth of dairy farms and proximity to New York City, Boston, Montreal, Buffalo and other major metropolitan markets. FAGE USA, one of the largest yogurt brands in the United States, sited its U.S. production facility in Fulton County. In 2013, CG Roxane began bottling and shipping Crystal Geyser® Alpine Spring water from a nearly 180,000 square foot bottling plant in Johnstown. Local specialty sausage manufacturer Espuna located their Imperial Chorizo brand headquarters in a state-of-the-art, USDA-approved 23,000-sq. ft. facility in Gloversville.

Key Tourism Figures

"The 2015 Economic Impact of Tourism in New York State"

- \$54 million annual traveler spending in Fulton County including over \$30 million in spending by seasonal homeowners
- Visitor spending in Fulton County grew by more than 7% in one year
- Tourism supports 756 jobs with \$19.6 million in annual earnings
- Tourism generates \$3.7 million in local taxes annually

Shovel Ready Sites and Development Areas

Shovel-ready sites in Fulton County include the following:

- **Tryon Technology Park:** Accessible from Exits 27 and 28 off I-90. 220 acres of pristine land in a wooded, quiet environment. Expedited project approvals are provided.
- **Johnstown Industrial Park:** Located four miles from I-90 and off NYS Route 30A. Currently home to FAGE Yogurt, Walmart Food Distribution, Benjamin Moore Paints, Euphrates Cheese and others. The Park is an ideal location for food processing and manufacturing businesses. Expedited project approvals are provided.
- **Crossroads Business Park:** The Park's 70+/- acres of fully-serviced land provides a convenient and comfortable location for a variety of white-collar businesses including the medical device manufacturer EPIMED. Expedited project approvals are provided.
- **Crossroads Industrial Park:** Located on NYS Route 29 approximately seven miles from Exit 28 off I-90, the Park has six acres of shovel-ready land available. It is home to a number of companies including Midwest Fasteners, SWANY and Falk Industries. Expedited project approvals are provided.

Other development areas in Fulton County include the following;

- **Regional Business Park:** A 260+/- acre parcel of land south of the Johnstown Industrial Park is being prepared into a shovel ready site to attract a game changing company.
- **NYS Route 29 Corridor:** The NYS Route 29 commercial corridor, which runs from the City of Johnstown to Downtown Saratoga Springs, currently has recreational and commercial uses, including the YMCA, Hales Mills Golf Course, Fulton County Visitor Center, Animal Medical Center, Jackie's Diner, Adirondack Harley Davidson and Holland Meadows Golf Course.
- **NYS Route 30 Corridor:** The corridor is a gateway to the Adirondack Park and the largest commercial corridor in Fulton County with many name-brand retailers, restaurants service oriented and specialty retail as well as locally owned establishments.
- **NYS Route 30A Corridor:** NYS Route 30A is a high traffic commercial corridor featuring name brand retailers, restaurants, specialty retail and numerous locally-owned businesses.

Expanding Clusters

New York's health sector is also expanding and the County has multiple community-based health care centers, including Nathan Littauer Hospital which includes a 74-bed acute care hospital and an 84-bed skilled nursing home.

The Logistics, Agriculture and Food Processing, and Medical and Healthcare Manufacturing industries gained hundreds of new jobs in the past ten years in Fulton County, and these sectors continue to be strong opportunities for job growth. In December 2016, the Bureau of Labor Statistics reported an unemployment rate of 5.7%, with 21,624 employed. There were significant year-over-year job gains between June 2015 and June 2016 in certain sectors, including manufacturing; trade, transportation and utilities and leisure and hospitality.

DEVELOPMENT OPPORTUNITIES IN FULTON COUNTY

Whether its a shovel-ready site in a technology/industrial park for a new company or vacant land for a housing, retail or mixed use development, there are numerous development opportunities readily available in Fulton County.

SHOVEL READY SITES

1 Tryon Technology Park

Accessible from Exits 27 and 28 off I-90. 220 acres of pristine land in a wooded, quiet environment with all infrastructure in place. Expedited project approvals.

2 Johnstown Industrial Park

Located four miles from I-90 off NYS Route 30A, this 400 acre Park has 20 acres remaining. Currently home to FAGE Yogurt, Walmart Food Distribution, Euphrates Cheese and Benjamin Moore, the Park is an ideal location for food processing and manufacturing businesses. Expedited project approvals.

3 Crossroads Business Park

The Park's 70+/- acres of fully-serviced land provides a convenient and comfortable location for a variety of businesses including the medical device manufacturer EPIMED. Expedited project approvals.

4 Crossroads Industrial Park

Located on NYS Route 29 approximately seven miles from Exit 28 off I-90, the 55+/- acre Park has 6 acres of shovel-ready land remaining. It is home to a number of tenants including Sysco Foods, Midwest Fasteners and SWANY. Expedited project approvals.

PRIMARY MIXED-USE DEVELOPMENT AREAS

5 Hales Mills Development Area

A 490+/- acre vacant tract of land ready for development. Concept Plan features housing, retail, recreation and open space. See page 16.

6 Vail Mills Development Area

A 450+/- acre area at the junction of NYS Routes 29 and 30 in the Town of Mayfield. This high traffic corridor is an ideal place for new investment. See page 17.

PRIMARY DEVELOPMENT AREAS CON.

7 Tryon Development Area

A 100+/- acre vacant tract of land with water and sewer available. Located on Co Rte 158 just off NYS Rte 29. Concept Plan features mixture of various housing types and commercial/retail. See page 19.

OTHER DEVELOPMENT AREAS

8 Fulton-Montgomery Regional Business Park

A 260+ acre parcel of land south of the Johnstown Industrial Park is being prepared as a shovel-ready site.

9 NYS Route 29 Corridor

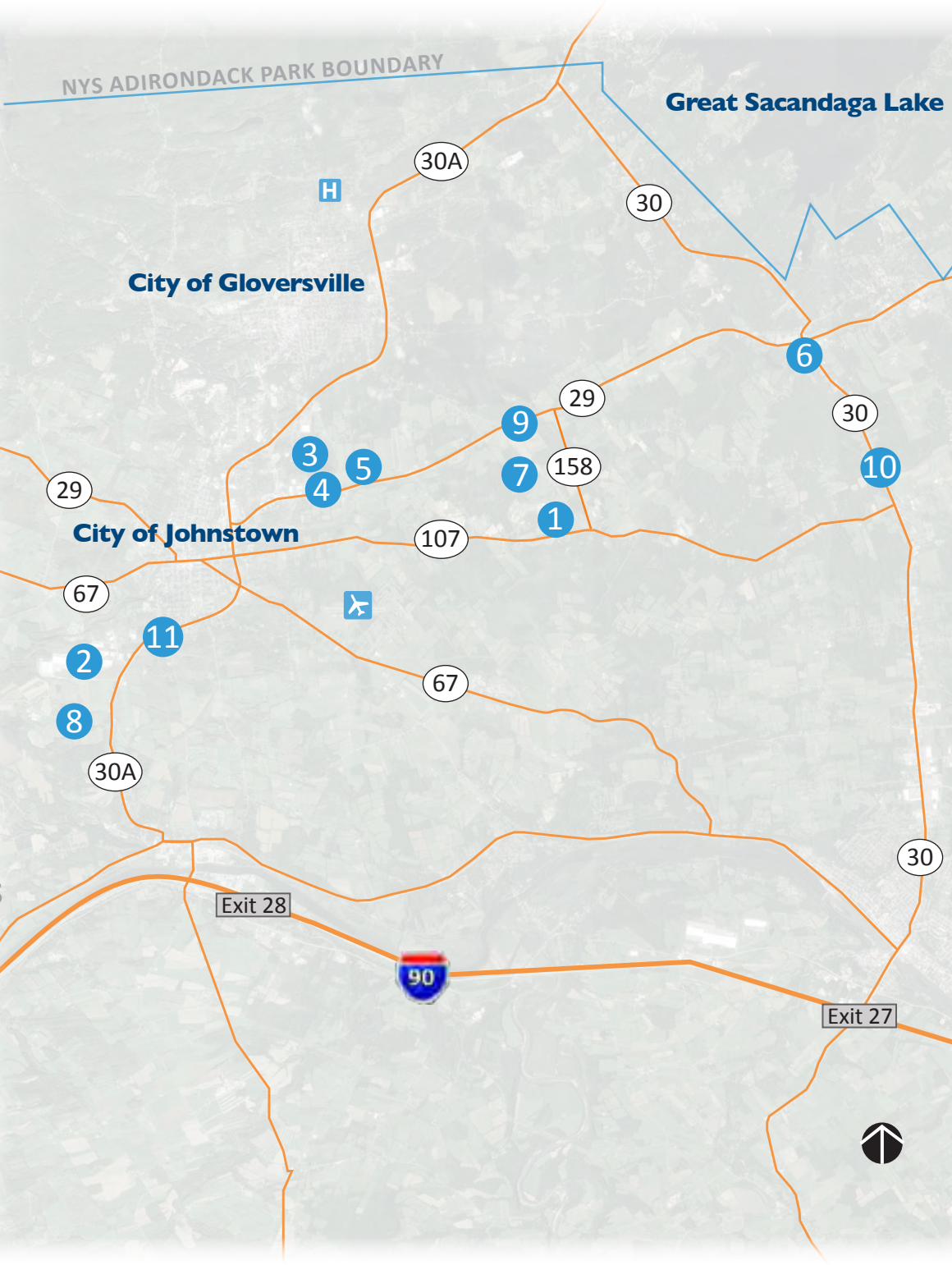
The NYS Route 29 commercial corridor, which runs from the City of Johnstown to downtown Saratoga Springs, is currently home to recreational and commercial uses, including the YMCA, Hales Mills Country Club, Animal Medical Center, Jackie's Diner, Adirondack Harley Davidson, Fulton County Visitors Center and more. Hundreds of acres of affordable space.

10 NYS Route 30 Corridor

The corridor is a gateway to the Adirondack Park and the largest commercial corridor in the Fulton-Montgomery County region with many name-brand retailers, restaurants and service-oriented and specialty retail as well as locally owned establishments.

11 NYS Route 30A Corridor

NYS Rte 30A is a high traffic corridor featuring name-brand retailers, restaurants, specialty retail and numerous locally-owned businesses.



Municipal Infrastructure

Fulton County and its municipalities own and operate high-quality municipal infrastructure to support all existing and new development opportunities. This includes:



- **Cities of Gloversville and Johnstown's Municipal Water Systems:** The Cities both operate and manage excellent municipal water systems.



- **SMART Waters:** Fulton County's innovative regional water and wastewater system provides these services anywhere in the County to support a development project.



- **Gloversville-Johnstown Joint Wastewater Treatment Plant:** With millions of gallons of excess capacity to support development, this award-winning Plant was the first in the nation to produce 100% of its own power from anaerobic digestion. The Plant earned the 2015 Project of the Year Award from the Capital Region Branch of the American Public Works Association.



- **Fulton County Landfill:** The Fulton County Landfill was one of the first facilities in New York State to be permitted under NYSDEC's Part 360 Regulations. The landfill accepts various types of waste. Its tipping fees are amongst the lowest in New York State.



- **Fulton County Airport:** The County-owned General Aviation Airport features a 4,000' paved runway and parallel taxiway, precision approach path indicators and an Automated Weather Observing System. Located just east of the City of Johnstown, the airport is within an hour's distance of Boston, New York City, and Montreal.

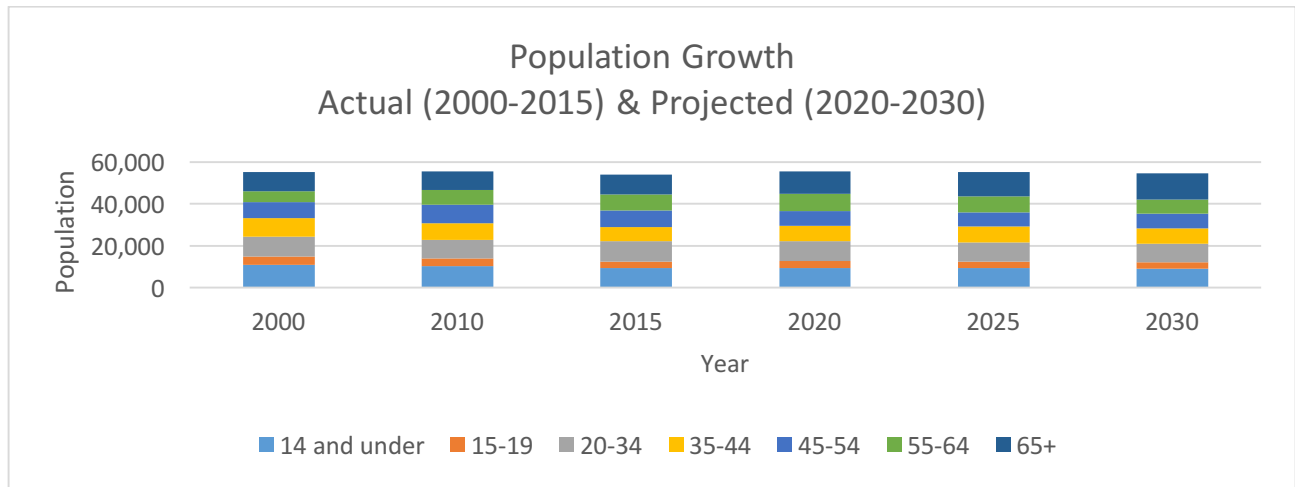
VIII. FULTON COUNTY BY THE NUMBERS

Summary (2014 - 2015 Data)	
	Fulton County
Population and Households	
Population (2010)	55,153
Population (2020 Projected)	55,629
Households	22,300
Avg. Household Size	2.4
% Population over 65: 2010	16.0%
% Population over 65: 2020	19.4%
Households by Income (2015 est.)	
Median Household Income	\$47,000
<\$25,000	5,860
\$25,000 - \$50,000	5,940
\$50,000 - \$75,000	4,590
\$75,000 - \$100,000	2,370
\$100,000 - \$150,000	2,670
\$150,000+	856
Housing	
Housing Units (2010)	28,600
Pct. Owner-Occupied (2011-2015)	70%
Pct. Renter-Occupied	30%
Median Home Value	\$108,200
Median Gross Rent	\$711
% of Housing Stock built before 1939	37.7%
Total # of Seasonal Homes	3,450
Education	
High School Graduate or Higher	86%
Pct. Bachelor's Degree or Higher	16.2%
Economy	
Mean Travel Time to Work (minutes)	24.1
Retail Sales per Capita (2012)	\$12,300
Unemployment Rate ²	5.7%
Average Wage for a Fulton County Employee (2014)	\$17.00/hour
Average Wage in Manufacturing	\$19.30/hour
Average Wage in Wholesale	\$22.20/hour
Average Wage in Transportation and Warehousing	\$18.00/hour

² As of December 2016

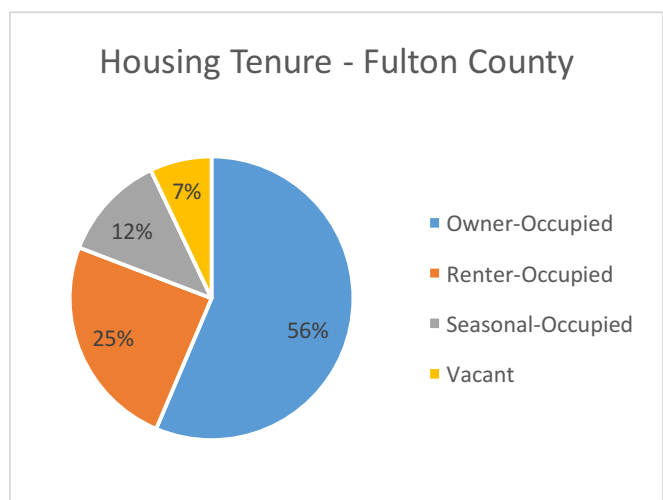
Population

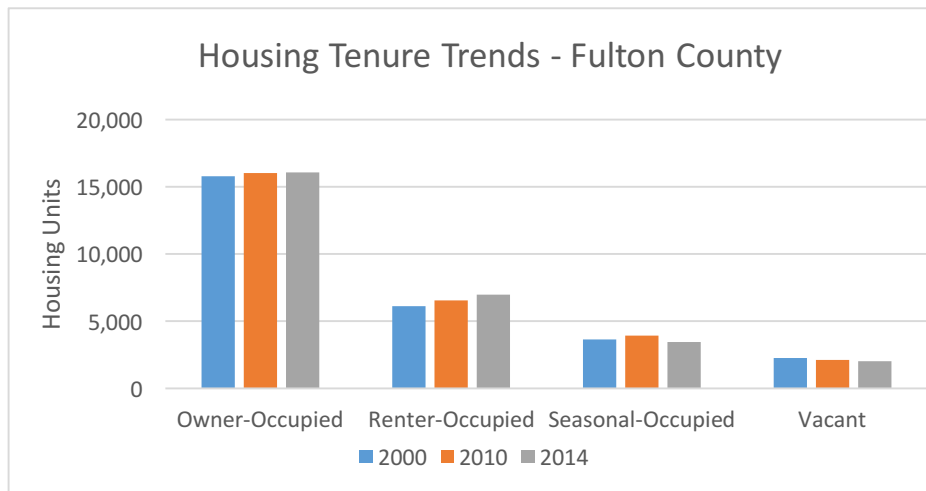
Following a slight decline between 2000 and 2014, the County's population is projected to increase to 55,630 by 2020. A notable population trend between 2000 and 2014 is a near 20% increase in residents in their peak earning years (age 45-64.) Although longer-term projections show modest decline, the County's committed efforts to attract new businesses and residents are designed to turn that trend around.



Housing

Fulton County's existing housing stock features a strong supply of beautiful historic homes, as well as affordable properties that may need reinvestment (85% of units were constructed before 1990). Between 2005 and 2015, over \$136 million was invested in the County's housing stock to build 158 multi-family units including market rate conversions in the cities and 826 single-family homes. According to building permit data, the average cost of constructing a multi-family unit was nearly \$60,000 and \$154,000 for a single-family home. The housing mix is changing, with a growing percentage of rental units. Existing senior housing units in the County have sustained vacancy rates below 3% and maintain waiting lists.





Renter- Vs. Owner-Occupied Housing Units - Fulton County					
Housing Unit Status	2000	2010	2014	% Change 2000 to 2014	% Change 2010 to 2014
Owner-Occupied	15,776	16,001	16,050	1.7%	0.3%
Renter-Occupied	6,108	6,553	6,956	13.9%	6.1%
Seasonal-Occupied	3,631	3,907	3,451	-5.0%	-11.7%
Vacant	2,272	2,101	2,007	-11.7%	-4.5%
Total	27,787	28,562	28,464	2.4%	-0.3%

Source: Fulton County Development Strategy: Housing Strategy (2016)

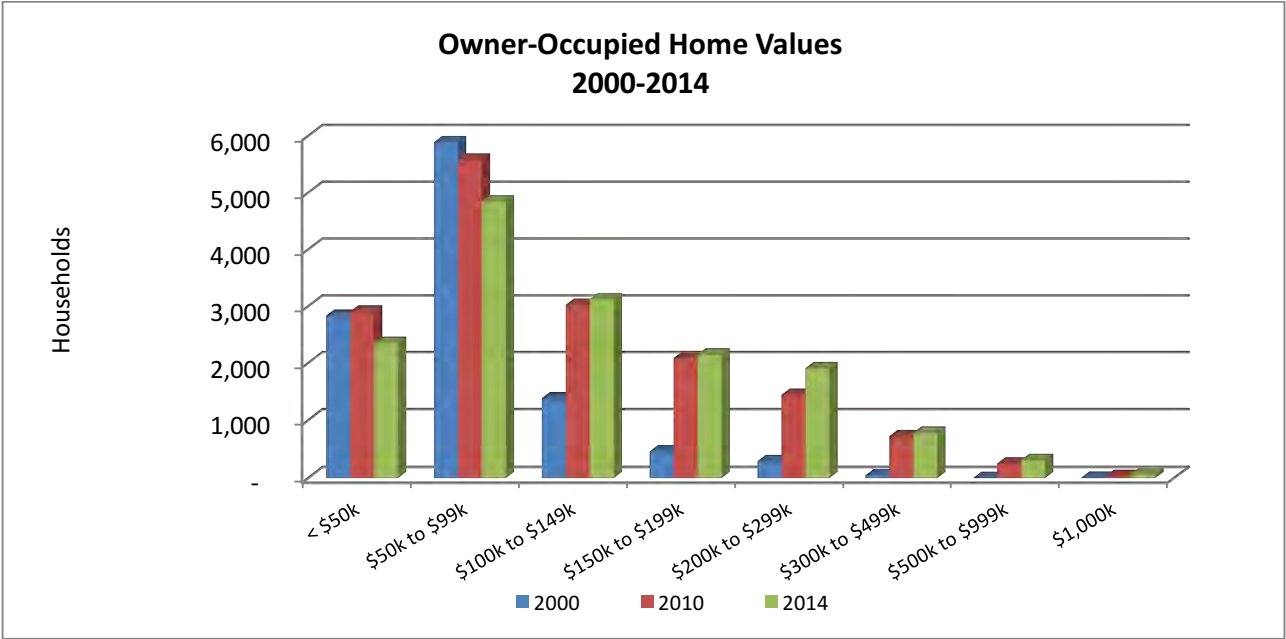
Housing Values

The average median value of an owner-occupied home in 2014 was \$107,500, slightly below the New York State median home value of \$112,000.³ 2014 Home values rose 59.5% since 2000 and 12.9% since 2010. The Town of Mayfield has the highest home value (\$264,000) with the most affordable value in the City of Gloversville (\$76,000.) Apartment rents in the County are also reasonable with a 2014 average median rate of \$700 per month.⁴

Homes in Fulton County are reasonably priced and offer generally more affordable options than other surrounding counties, especially neighboring Saratoga County.

³ New York State median value from New York State Association of Realtors (NYSAR)

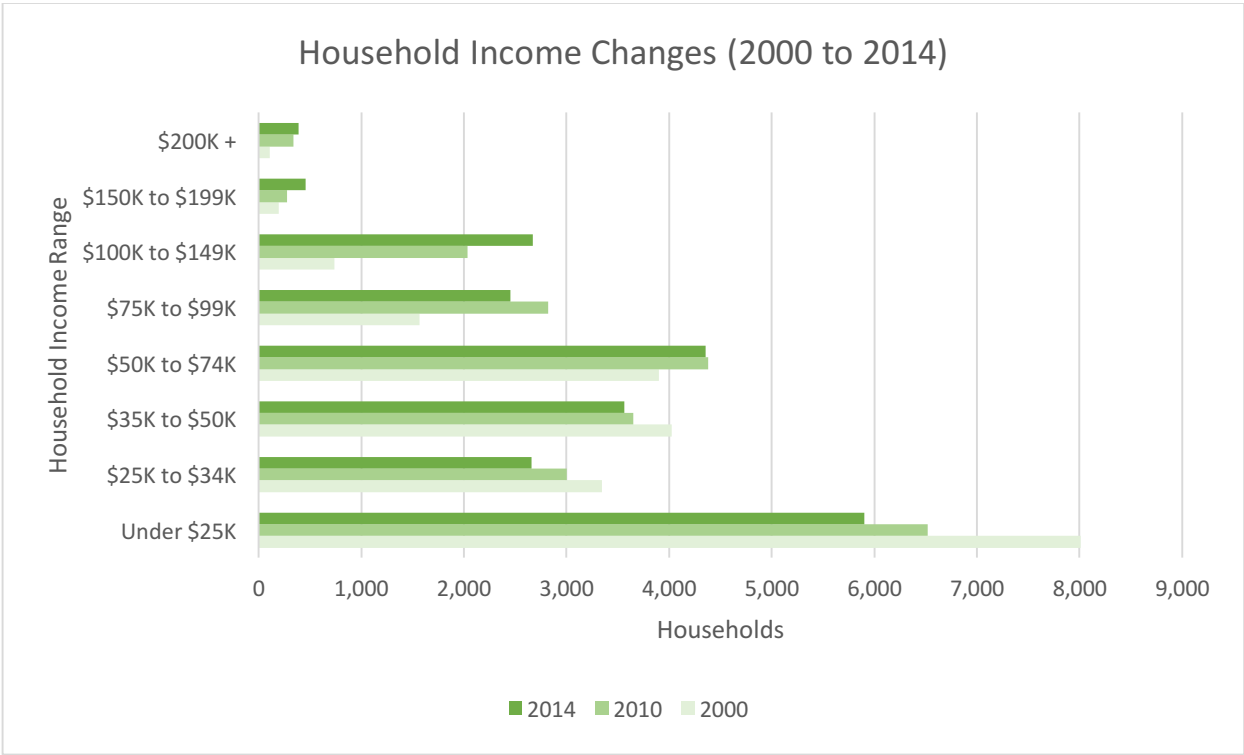
⁴ Fulton County Development Strategy: Housing Strategy (2016)

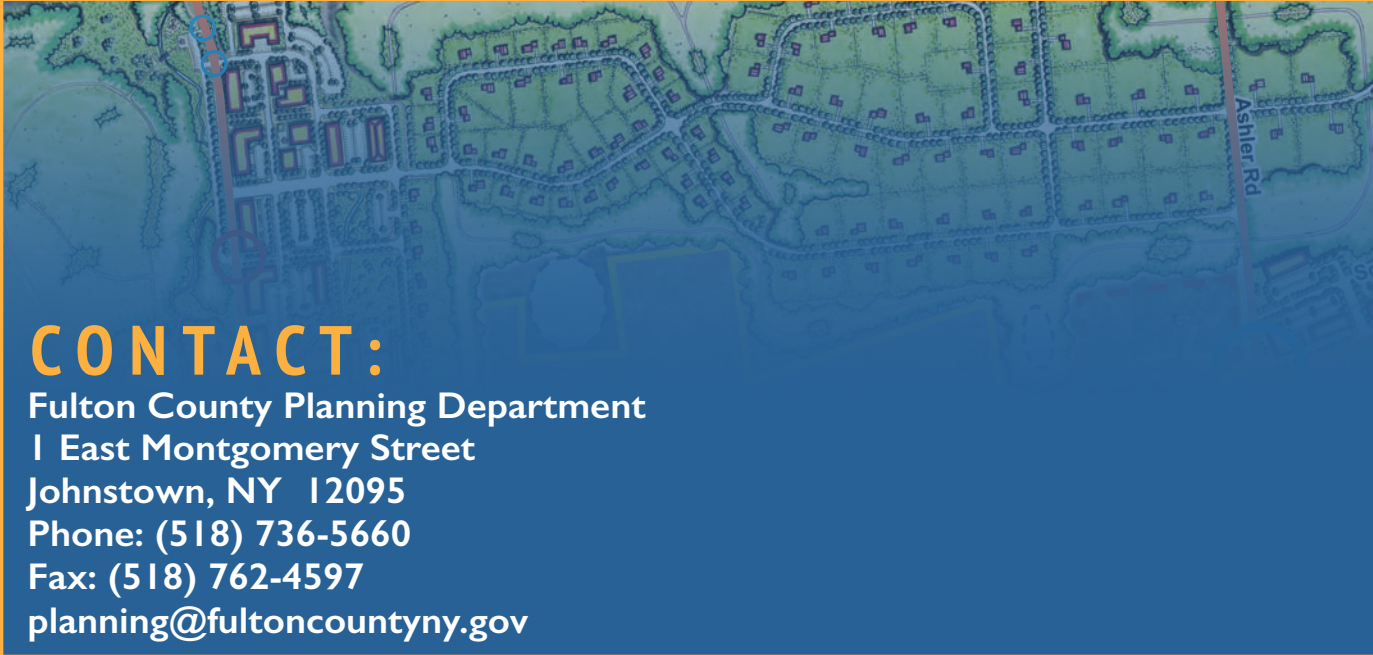


Source: Fulton County Development Strategy: Housing Strategy (2016)

Income

Household incomes have been rising resulting in additional spending power. Between 2010 and 2014, the average median household income grew by nearly ten percent to \$55,550.





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