

STRATEGIC PLAN

2024-2029



**Northern Border
Regional Commission**

Prepared by:



About TPMA

TPMA empowers organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change. TPMA provides professional consulting services and delivers transparent insights to the complete workforce, education, and economic development ecosystem that allows them to move forward, together. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. Our economic development approach aims to achieve community resiliency through economic diversity, resource alignment, and community vibrancy. TPMA's Economic Development and Community Resiliency Team provides expertise in assessing markets, identifying business sector opportunities, building innovation and entrepreneurial ecosystems, and conducting housing assessments to assist communities in developing solutions for local housing challenges consistent with community and economic development objectives. A variety of data sources were used to collect data for this Comprehensive Economic Development Strategy. Attempts were made to verify data as much as possible. Visit www.tpma-inc.com and follow TPMA on social media, including LinkedIn, Facebook, and Twitter.

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EXECUTIVE SUMMARY

Created by Congress in the 2008 Farm Bill, the Northern Border Regional Commission (NBRC) is a federal-state partnership serving the economic and community development needs in northern counties across Maine, New Hampshire, New York, and Vermont. Led by a presidentially appointed Federal Co-Chair, Executive Director, and dedicated team, the NBRC is committed to strategic growth and advancement to meet the needs of its constituents across the region. The commission's aspirations are outlined in this strategic plan, developed to inform, and guide the organization over the next three to five years.

To begin the strategic planning process, the NBRC employed professional consultancy firm Thomas P. Miller and Associates (TPMA) to assist in the process. Relying on extensive qualitative and quantitative research, intensive stakeholder engagement, and a collaborative partnership with leadership and the greater team at NBRC, TPMA and NBRC were able to craft a mission and vision appropriate for the future of NBRC.

Further, presented in this plan is a Strengths, Weaknesses, Opportunities, and Threats (SWOT) framework designed to help the NBRC understand the organization's effectiveness and future potential.

The SWOT Analysis presented was used to develop a strategic framework. This framework was constructed to enable NBRC to continue to optimize its operation and facilitate strategic growth so it can continue to meet its mission and serve the communities across the region.

MISSION

We catalyze community vitality and economic prosperity in the northern border region with flexible funding and strategic support.

REGIONAL VISION

We envision a future where heritage industries are celebrated, preserved, and supported, vibrant local communities form a rich tapestry of culture, ideas, and experiences, and the seamless integration of emerging technologies fosters a new era of prosperity and economic resiliency.

The SWOT Analysis framework includes:

STRENGTHS

Organizational Leadership
Flexible and Nimble Funding Source
Network of Local Development Districts

WEAKNESSES

Lack of Relationships with Underserved Communities
Lack of Capacity at the Local Level
Limited Impact Measurement

OPPORTUNITIES

Regional Champion
Expanded Funding Priorities
Leadership Development and Capacity Building

THREATS

Funding and Policy Uncertainty
Climate Change

The strategic framework includes the following five focus areas and corresponding strategies:

1

COMMUNICATION AND COLLABORATION

Strategy 1.1: Build and strengthen strategic relationships across the NBRC region.

Strategy 1.2: Activate an integrated marketing, communications, and stakeholder outreach strategy.

2

FUNDING AND PROGRAMS

Strategy 2.1: Take an active leadership role in convening relevant regional funding partners to foster a more collaborative funding ecosystem across the region.

Strategy 2.2: Within statutory limitations, embrace the role as a creative, nimble, and agile funding source.

3

SYSTEMS AND PROCESSES

Strategy 3.1: Develop systems to measure and evaluate programs, program related processes, and funding impact.

Strategy 3.2: Utilize technology to enhance the user experience for grant applicants and recipients.

4

DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY

Strategy 4.1: Take intentional steps to build meaningful relationships with representatives from underserved communities.

Strategy 4.2: Attract and retain diverse talent to NBRC

5

CAPACITY BUILDING

Strategy 5.1: Expand development pathways

Strategy 5.2: Create learning networks across regional stakeholder groups.

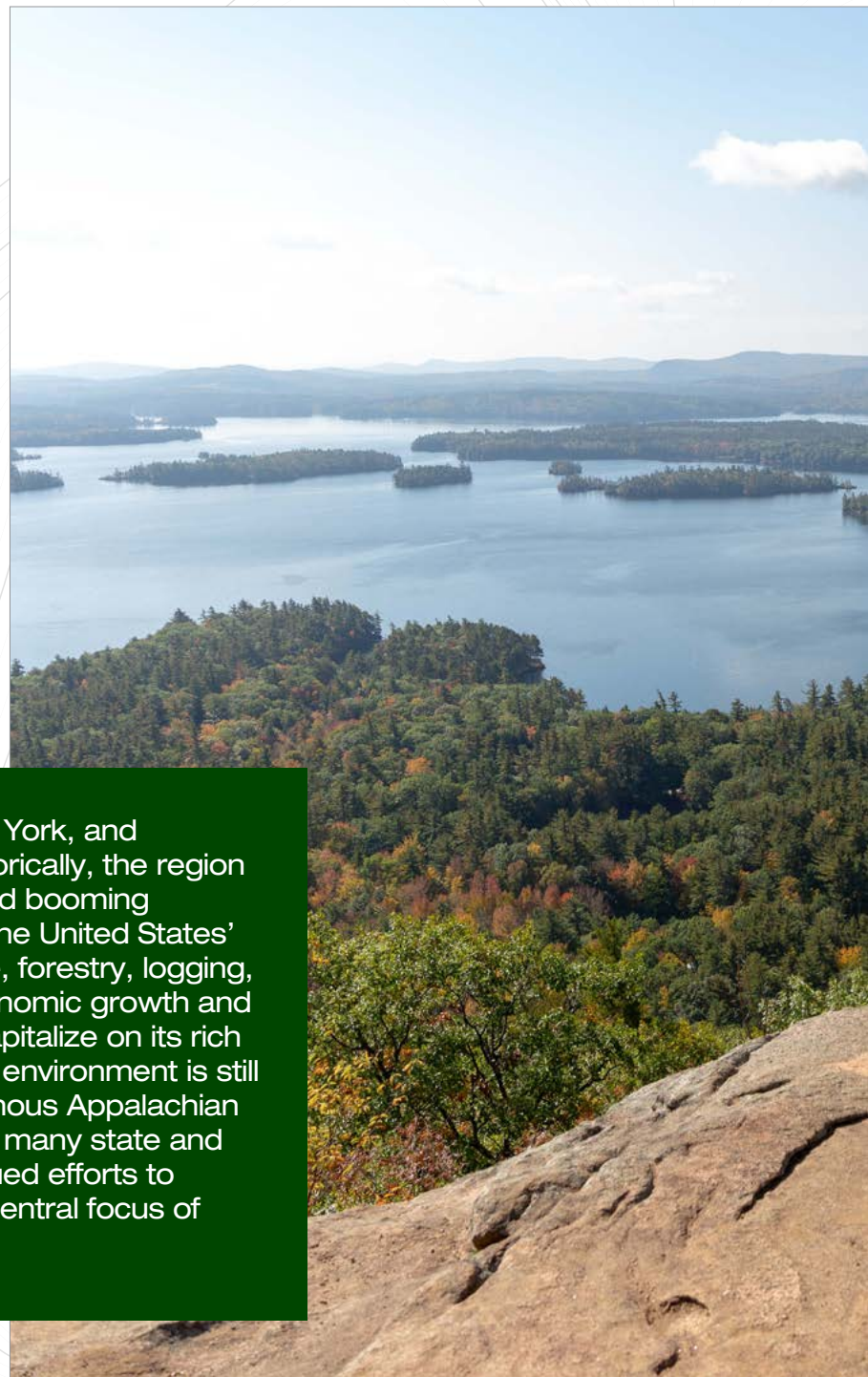
Strategy 5.3: Create venues and a clearinghouse to share best practices, case studies, and NBRC funded project examples.

INTRODUCTION



Northern Border Regional Commission

Sixty counties across Maine, New Hampshire, New York, and Vermont comprise the northern border region. Historically, the region has been defined by its hard-working population and booming industry, both of which were major contributors to the United States' early development across the continent. Agriculture, forestry, logging, manufacturing, and mining industries bolstered economic growth and provided a means for the people of the region to capitalize on its rich abundance of natural resources. Today, the natural environment is still one of the region's strongest assets. The world-famous Appalachian Trail passes through several member counties, and many state and national parks are nestled within the region. Continued efforts to leverage natural assets in a sustainable way are a central focus of current economic development strategies.





When analyzing the regional population, it's important to acknowledge and recognize the educational attainment across the represented counties. About 43% of the population currently holds an associate, bachelor's, or graduate degree and several nationally ranked educational institutions provide high-quality training within the region. While much of the population has received a formal education, there remains a skills gap to meet employer demand in growing industries. Some industries which were formerly pillars of economic growth in the region have declined in recent years; new training programs are being designed to support workers through career transitions into new, promising industries. Professional, scientific, and technical services industries, for example, have added thousands of jobs in recent years, and local economies are working to build their capacity to support growth in these sectors.

Other region-wide changes are affecting economic development in novel ways. Over the last two decades, the population has grown, though there has been variability in the year-to-year growth, and its composition is beginning to change. The most significant shift is likely to be found in the age trend. Every county has seen an increase in the population over the age of 60 years since 2016. This demographic shift impacts housing and healthcare, and it contributes to the workforce trends outlined above. The workplace itself is changing, too – an increasing supply of remote jobs makes rural communities an attractive option for those looking to escape urban life. To capitalize on new opportunities such as these, a multi-faceted economic development approach is required.

Through a concerted effort, many economic development organizations are working to catalyze regional growth in an ever-changing economy. Since economic conditions vary widely throughout the region, a variety of specialized projects aim to leverage existing assets to support new initiatives. Although many of the projects undertaken throughout the region are locally focused, a federal-state partnership is supporting this work by connecting local communities with new investment. This is the objective of the Northern Border Regional Commission, which serves the northern border region and its constituent counties.



Northern Border Regional Commission

The Northern Border Regional Commission (NBRC) is a partnership between the federal government and the states of Maine, New Hampshire, New York, and Vermont. The NBRC targets resources to promote economic growth strategies and projects in designated counties within its member states. The Commission was enacted by Congress through the 2008 Farm Bill which amended 40 US Code to include the creation of the NBRC as well as other similar Commissions nationwide. The statutory authority to create programs and fund projects is based on one vote of the Federal Co-Chair and the collective vote of the four Governors of the NBRC states. The NBRC was reauthorized in the 2014 Farm Bill and was reauthorized again in 2018.

The Federal government's representative to the Commission is the Federal Co-Chair who is appointed by the President following confirmation by the Senate. The roles and responsibilities of NBRC Members and NBRC staff are governed through bylaws which were last updated through a unanimous vote of the Members on January 12, 2021.

Like all the Federal-State Commissions, the NBRC was created to orient federal appropriations toward State prioritized economic and community development strategies and projects. Through the collective vote of their Governors, the States coordinate with the Federal Co-Chair to rank NBRC funding applications. This ensures that regional and State solutions to economic and demographic challenges are prioritized. All funded projects must be within the NBRC's four Program Areas and reflective of the NBRC's Five Year Strategic Plan.

In 2023, the NBRC deployed a historic \$43 million in grant funding through its newly rebranded Catalyst Program. 76% of grantees were new to NBRC funding.

MISSION

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REGIONAL VISION

We envision a future where heritage industries are celebrated, preserved, and supported, vibrant local communities form a rich tapestry of culture, ideas, and experiences, and the seamless integration of emerging technologies fosters a new era of prosperity and economic resiliency.

Investment Principles

- Invest for long-term community vitality and economic prosperity.
- Support local initiatives that contribute to regional solutions.
- Encourage integrative approaches to building economic, community, and environmental well-being and climate resiliency.
- Capitalize on local and regional assets to grow and retain wealth in the region.
- Use NBRC resources to fill gaps in the region's funding environment for community economic development.
- Stimulate and integrate the capacity and resources of other partners and funders.
- Invest in projects that promote diversity, equity, inclusion, and increased accessibility.
- Support rural communities and other communities characterized by persistent divestment with capacity building strategies and investments.

NBRC Roles

- **Investor.** The NBRC uses its grant resources to catalyze transformative community and business development projects, and brokers public-private investment to leverage its impact.
- **Partner.** The NBRC works with—and in support of—local, state, and regional partners to identify and advance regional development priorities.
- **Advocate.** The NBRC is an advocate for the needs and opportunities of the northern border region within federal and state agencies to bring enhanced attention and resources to the region.
- **Connector.** The NBRC connects community and business development leaders across the region to extend the reach of innovative and promising ideas and accelerate economic opportunities.
- **Equity Driver.** The NBRC aspires to allocate funding and deliver services that enhance equity across the northern border region.

NBRC Funding Priorities

NBRC may make grants to states, local governments, Indian tribes, and public and nonprofit organizations for:

- Transportation infrastructure;
- Basic public infrastructure;
- Telecommunications;
- Job skills training, skills development, and employment related education, entrepreneurship, technology, and business development;
- Distressed communities to address basic health care and other public services;
- Resource conservation, tourism, recreation, and preservation of open space;
- Climate resiliency;
- Renewable and alternative energy sources;
- Attainable, affordable, and accessible housing;
- Childcare and early education initiatives.

STRATEGIC PLANNING METHODOLOGY

RFP AND PROPOSAL PROCESS

In December 2022, the Northern Border Regional Commission released a Request for Proposal, soliciting applications from qualified consulting firms to assist with the development of a Strategic Plan, intended to guide the commission for the next 3-5 years.

Thomas P. Miller and Associates (TPMA) submitted a proposal and was ultimately selected to complete the plan in March 2023.

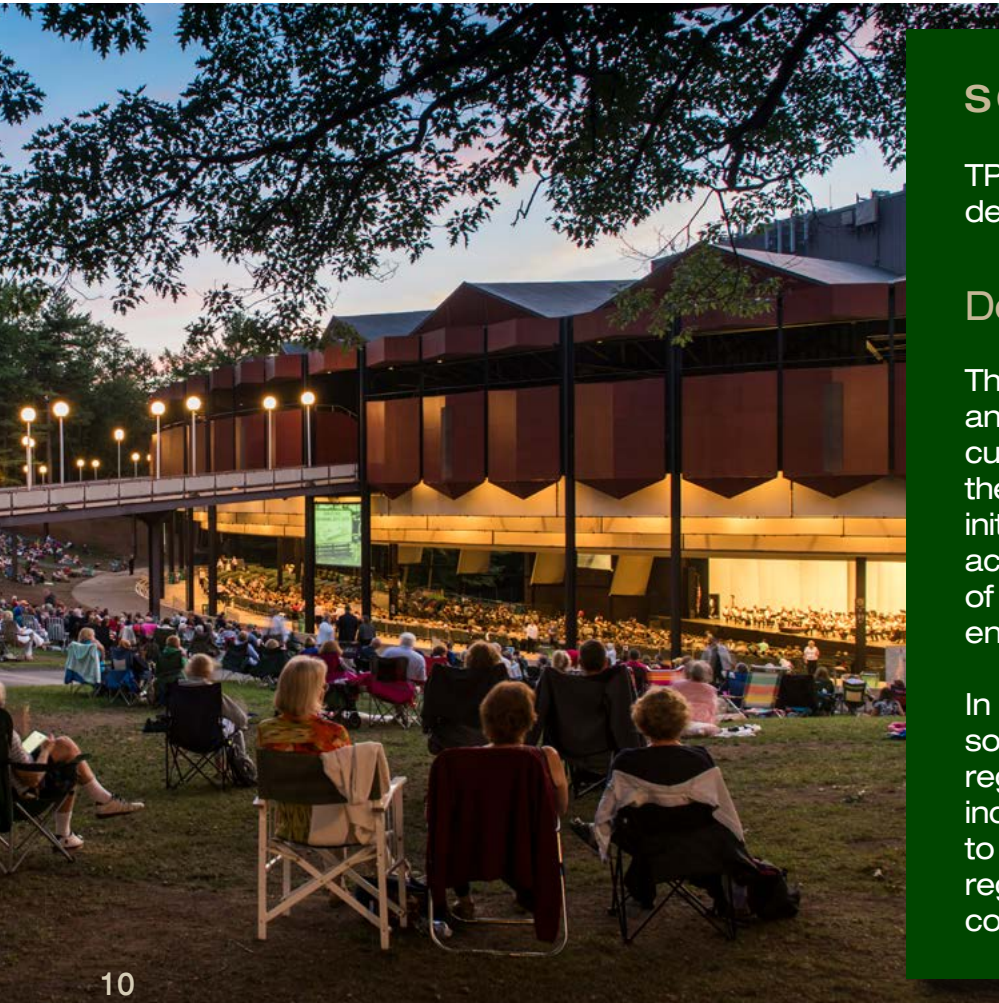
SCOPE OF WORK AND METHODOLOGY

TPMA (the project team) submitted a scope of work and followed a detailed methodology to complete the strategic plan:

Desktop Research

The project team collected and reviewed a variety of regional plans and reports to gain a deeper contextual understanding of past and current planning efforts in the region. This document review enabled the project team to establish an understanding of ongoing and planned initiatives and helped inform subsequent stakeholder engagement activities. This effort also allowed the project team to avoid duplication of past and present efforts, but rather, build upon those efforts to enable NBRC to move forward with its goals and objectives.

In addition to a document review, the project team examined socioeconomic and demographic details across the northern border region. The analysis included examining regional demographics, industry characteristics, and workforce trends. This analysis was used to gain a deeper understanding of the economic conditions in the region and was summarized in a summary of economic conditions contained in Appendix A of this report.





SWOT Analysis and Strategic Framework

Based on the desktop research and the stakeholder engagement, the project team developed a SWOT (strengths, weaknesses, opportunities, threats) Analysis to evaluate internal assets and obstacles, paired with an assessment of the external environment to inform a strategic framework to guide the commission. The strategic framework was organized around five key strategic focus areas, which are presented later in the document.

Stakeholder Engagement

The project team utilized a variety of methods to gain insight and feedback from both internal and external NBRC stakeholders.

To begin the strategic planning process, the project team conducted two virtual design sprints, with key stakeholders and NBRC leadership and team members. These design sprints played a critical role in determining the best approach to external stakeholder engagement, including identifying stakeholders and partners, and the appropriate topics and questions to formulate to inform the strategic plan.

Second, the project team hosted eight virtual focus groups with key constituents across the northern border region. Key stakeholder groups included:

- Regional Partners
- State Agencies
- Subject Matter Experts
- Project Administrators
- Representatives from Underserved Communities
- Eligible Grantees
- Other State and Federal Funders
- Past and Current Grant Awardees

The project team developed a facilitation guidebook to structure productive conversations across the various virtual focus groups. Using this guidebook, the project team was able to collect feedback and insight on a range of topics, including but not limited to:

- Familiarity with the NBRC
- Vision for the future of the NBRC
- Unmet economic development needs in the region
- Process improvements for the NBRC
- Building or enhancing collaboration between the NBRC and stakeholder organizations

Lastly, a survey was circulated to stakeholders across the region to supplement feedback garnered in the virtual focus groups. It's important to note that 48% percent of the survey respondents were unable to attend the virtual focus groups, thus providing additive feedback to that gathered during earlier phases of the stakeholder component of this process.

STAKEHOLDER ENGAGEMENT

DESIGN SPRINT

To begin the planning process TPMA conducted two design sprints. These design sprints were used to develop a comprehensive stakeholder engagement plan for the NBRC's strategic planning process.



Design Sprint #1

Attendees at the first session identified and prioritized the challenges and barriers to economic development work within the northern border region. From this session, the top challenges were:

- Project management capacity/skills and funding for project management
- Workforce housing
- Climate resiliency
- Long-term planning for critical projects

Using this information, the participants identified key topics for stakeholder engagement to delve deeply into the identified economic development challenges. The identified topics were:

- Capacity for project management & long-term planning
- Funding for planning
- Planning funding for Local Development Districts (LDDs)
- Training for LDDs on project development

Attendees then provided contact information for individuals and organizations who could speak on those topics. Finally, attendees created a shared vision for what they hoped the outcome of the stakeholder engagement process would be. These participants envisioned, *“A clear and unique role for NBRC as funder, convener, capacity-builder, leader in economic development to help shape this region’s future.”*

Design Sprint #2

The first activity of the second sprint was to create a vision for the outcome of the stakeholder engagement process. Participants envisioned that the stakeholder engagement process will, *“connect NBRC with un/underserved communities and provide insight into the needs of our communities and how we are or are not addressing those needs currently.”*

Attendees ranked the top barriers from the previous sprint and brainstormed additional topics for stakeholder engagement. The NBRC staff identified the following topics:

- Green infrastructure
- Inclusivity
- Transparency and Roles & Responsibilities
- NBRC’s Role as a Convener
- Capacity Building and Funding Accessibility
- Data Needs
- Storytelling

To address these priorities, participants identified potential groups of stakeholders, and added contact information to the stakeholder database. These stakeholder groups were:

- Students
- Experts in New Areas
- Connectors to Underserved/New Communities
- Housing
- Other Funders
- Education Institutions
- Outdoor Recreation
- Local Specialists/Agencies
- Current Grantees
- Past Grantees
- Tribes
- Other/Miscellaneous

Following the conclusion of the two design sprints, the stakeholder databases and the identified topics aided in the creation of the stakeholder engagement plan, including the virtual roundtables and stakeholder survey.



GOVERNOR'S ALTERNATES INTERVIEWS

In July and August 2023, the project team interviewed the four Governor's Alternates and State Program Managers who represent the interests of their respective states within the NBRC's service area.

Through these interviews, the project team collected information about:

- The role of the Governor's Alternate and State Program Manager within the NBRC and the evolution of those roles
- Vision for the future of the NBRC
- Strengths and weaknesses of the NBRC
- New opportunities for collaboration and partnership
- Updates to grant scoring and investment priorities

Across the interviews with the four states, several common themes emerged. These were:

- Lack of local and regional capacity
- Confusion around county designation
- The need for more storytelling, specifically about project successes, obstacles, and best practices
- How to best encourage cross-state and regional collaboration
- Support for pilot programs for new funding opportunities
- Research and communication related to emerging trends
- Interest in the NBRC acting in an advocacy role for the unique challenges and opportunities facing the region
- Technology adoption by the NBRC for improved project efficiency
- Challenges and opportunities for braiding funding across agencies

Feedback received from these interviews guided the virtual roundtables and survey design and provided critical insights for the SWOT analysis and Strategic Framework.

VIRTUAL ROUNDTABLES

In October 2023, TPMA, in partnership with the Northern Border Regional Commission (NBRC), held eight virtual roundtable sessions to engage stakeholders in the NBRC's strategic planning process, with a total of 57 stakeholders participating.¹ These virtual roundtables were designed to collect information on a range of topics, including but not limited to:

- Familiarity with the NBRC
- Vision for the future of the NBRC
- Unmet economic development needs in the region
- Process improvements for the NBRC
- Building or enhancing collaboration between the NBRC and stakeholder organizations

Key stakeholder groups included:

- Regional Partners
- State Agencies
- Subject Matter Experts
- Project Administrators
- Representatives from Underserved Communities
- Eligible Grantees
- Other State and Federal Funders
- Past and Current Grant Awardees

A summary of key findings and themes from across the roundtables follows.

NBRC'S CURRENT ROLE AND VISION FOR THE FUTURE

Across all roundtables, the NBRC was consistently seen as a unique and flexible funding source that is often able to fund projects that are not eligible for other funding sources. The NBRC staff received frequent accolades from participants for their responsiveness and problem-solving abilities. Additionally, stakeholders were pleased with the variety of projects that the NBRC was willing and able to fund.

When asked about a vision for the future of the NBRC, there were a variety of opinions expressed by participants, with a portion not interested in further evolution of the organization, and another segment who expressed interest in the NBRC taking on additional roles. These potential roles included "convener" and "advocate."

ECONOMIC DEVELOPMENT NEEDS

Identified top needs across stakeholder groups include housing, childcare, public water infrastructure (including drinking water and wastewater systems), energy and climate resiliency, infrastructure (in general), and capacity building. Concerns were raised about the match requirement and 80% federal contribution limit, particularly as barriers for the smallest towns and most underserved communities.

PROCESS IMPROVEMENTS

Through the virtual roundtables, TPMA collected information and recommendations for how the NBRC can improve technical assistance, programs, funding, and enhance collaboration. Some suggested improvements may be beyond the scope of the NBRC but are included for completeness. Recommendations for process improvements included:

Communication and Collaboration

- Assist with better communication and follow-through with state representatives.
- Better explain the roles and responsibilities of the NBRC and the state.
- Convene other funders/federal agencies to align on a more focused and layered place-based approach.
- Provide feedback to unsuccessful applicants.
- Provide more clarity to applicants around the scoring process.
- Host a conference or recorded webinars to share information, ideas, strategies, and provide training.
- Increase early communication and awareness of upcoming grant opportunities.



Funding and Programs

- There is an incorrect perception that in-kind sources and volunteer time do not count towards match.
- Reduce or eliminate match requirements.
- Pay LDDs for pre-award work.
- Refer applicants to other funding streams, either for match requirements or if they are not eligible or invited to apply.

Systems and processes

- Use an integrated CRM system/web portal so projects are tracked, and applicants can see status.
- Reduce the complexity of the NEPA process.
- Review the “distressed areas” criteria and the geographic level at which the designation is made.

Capacity Building

- Assist grantees with the Request for Proposal (RFP) process (creating a template, etc.).
- Evaluate LDD involvement in the project development process.
- The need for learning networks to better structure projects, capital stacks, and utilize best practices.

STAKEHOLDER SURVEY

In addition to the virtual roundtable sessions, a survey was circulated among stakeholders in the region to increase input. 56 survey responses were collected. Of the 56 respondents, about 48% were unable to participate in the roundtable sessions and therefore provided unique input through the survey. Nearly all respondents indicated that they were familiar with the work and mission of the NBRC.

A variety of organizations were represented by survey respondents. In some cases, respondents represented more than one organization. About 46% of respondents were eligible NBRC grantees; about one third of respondents were a part of a regional partner organization. Funding agencies, state agencies, and representatives of underserved communities throughout the region participated, as well as some members of local governments and industry representatives, which were grouped into the “Other” category.

When asked to indicate which services their organization received from the NBRC, a little over half of respondents reported receiving funding from the commission. Others received information about programs relevant to their organization, assistance in connecting with other funders or related organizations, or technical assistance. Ten respondents indicated that they were currently receiving no services from the NBRC.

Respondents were then asked to indicate which types of services would be most helpful to receive from the NBRC. Funding, again, was the most popular option, followed by knowledge sharing and assistance with connecting with other funders or related organizations. The ranking of preferred services matches the ranking of services currently provided, which implies that the NBRC is properly organizing the distribution of its resources.

Twenty-one survey respondents indicated that they would like the NBRC to provide them with research. When asked what kind of information would most benefit their organization, the majority expressed interest in information about other funding

sources that could be used with NBRC funds. An equal number indicated that they’d like to learn more about rural economic development best practices. Other respondents suggested that information about past NBRC funding, current issues in the northern border region, and impact reports would be useful.

Of the 56 respondents, 20 indicated that they would like the NBRC to serve as a connector or convenor in some capacity. Many suggested that the most helpful connections would be those made with multiple federal agencies, which could ideally provide education about existing programs and available opportunities. Some respondents desired greater connection with regional partners to create regional initiatives; others felt that they would like the NBRC to connect them with similar projects or opportunities.

When asked whether they’d like the NBRC to serve as an advocate, only 11 respondents answered ‘yes’. Of those, nearly all expressed that an advocate for the needs of small, rural towns at the federal level was important. Others expressed that higher NBRC appropriations should be sought, as should the creation of additional federal programs which are designed to serve rural areas.

To close, survey respondents were asked to select the top three most pressing economic issues facing their region from the list below. Housing was, by far, the most common selection, with nearly two thirds of respondents identifying it as a pressing issue. Childcare was the second most common selection, followed by issues related to the capacity of their local municipal organizations. Various types of infrastructure-related challenges were identified, as were challenges related to labor force availability and workforce development.

These survey responses are reflective of many of the key takeaways from the design sprints, virtual roundtable sessions, and Governor’s alternates interviews. Along with the quantitative data, this stakeholder feedback can inform an assessment of the strengths and weaknesses of the NBRC, as well as a forward-looking evaluation of opportunities and threats.

SWOT ANALYSIS

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis is a common framework used to evaluate a public organization's effectiveness and future potential. The analysis is used as part of the strategic planning process, and the findings can be used to help an organization develop effective strategies to create significant and long-lasting public value. Strengths and weaknesses are internal in nature and refer to the present capacity of the organization. Opportunities and challenges are external and refer to future potential for success or failure.

The SWOT Analysis presented below is based on findings from desktop research, including review of previous and current planning documents, funding program literature, website reviews, and an analysis of planning documents made available from state partners. Additionally, a quantitative review and analysis of economic conditions across the region was conducted. The desktop research was supplemented by intensive stakeholder engagement, including virtual focus groups, interviews, and surveys conducted with key strategic partners and stakeholders across the region.





Those stakeholders include:

- State partners
- Local Economic Development Districts
- Project administrators
- Current and past grant award winners
- Eligible grantees
- Subject matter experts in the fields of economic development, workforce development, community development, infrastructure, climate change and resiliency, etc.
- Philanthropy and social service organizations
- Representatives from underserved communities

STRENGTHS

Organizational Leadership

Across all stakeholder engagement sessions, participants had high praise for the current leadership team at NBRC. State economic development partners, including those interviewed on behalf of the state Governors, consider the NBRC a trusted and reliable funding partner. NBRC is viewed as responsive to the needs of the communities it serves, and willing and able to act collaboratively to help states reach their economic development goals.

Flexible and Nimble Funding Source

Stakeholders, specifically eligible organizations at the local and regional levels, agreed that NBRC funding programs are flexible and agile relative to other federal and state funding opportunities. Stakeholders appreciate NBRC's willingness to fund innovative and creative projects beyond traditional brick and mortar economic development projects. Various stakeholders noted that without NBRC funding, certain projects in rural communities across the region wouldn't be possible.

Network of Local Development Districts

In recent years, The NBRC has continued to fortify and foster effective relationships with Local Development Districts (LDDs) across the region, increasing its outreach and improving relationships with local leaders. The NBRC has made a commitment to regional stakeholders by working with LDDs to enhance service for applicants, explicitly stating a particular interest in serving historically underserved communities. Additionally, LDDs represented in stakeholder focus groups confirmed the mutually beneficial and collaborative relationship with the NBRC.

WEAKNESSES

Lack of Relationships with Underserved Communities

Limited participation in the various stakeholder engagement sessions made it apparent that NBRC needs to develop more meaningful and trusting relationships with members of underserved communities across the region. This lack of meaningful relationships hinders NBRC's ability to direct funding into communities who perhaps need support most. These underserved communities include indigenous tribes, minority, and LGTBQ+ stakeholders.

Lack of Capacity at the Local Level

Many of the communities that rely on NBRC funding are unable to put forth competitive applications due to lack of capacity and resources. Further, due to the relative complexity of reporting requirements, small communities do not have the appropriate capacity to manage the administrative responsibilities associated with funding and grant management. These challenges were consistently mentioned across stakeholder engagement sessions and recognized and confirmed during interviews with NBRC staff members.

Limited Impact Measurement

Several stakeholders observed that reporting and measurement of past projects is limited to outputs and less on outcomes. Research into annual reporting and other relevant documents on the NBRC website confirmed these observations. To date, NBRC has struggled to fully understand the economic and community impact its investments are making. A better understanding of this impact will help the NBRC evaluate and as needed, adjust program criteria, eligibility, and priorities to optimize impact.

OPPORTUNITIES

Regional Champion

NBRC is in a unique position to play a more significant role as a regional champion, collaborator, and convening agent. Opportunities include hosting an annual regional conference and facilitating opportunities for state and regional organizations to communicate and collaborate with more consistency and intention. Additionally, given its vast network, NBRC has access to information, studies, reports, and expertise relevant to its interested stakeholders across the region. NBRC can play a more active role in disseminating that information to its partners to ensure they're aware of pertinent updates to legislation, policy, technology, and emerging trends.

Expanded Funding Priorities

Consistently across stakeholder focus groups, participants cited opportunities for NBRC to expand funding programs to include emerging relevant economic and community development needs. Three prominent needs cited by stakeholders include affordable and accessible housing development, investment in childcare and early childhood education, and further investment in climate resiliency and climate change preparedness.

Leadership Development and Capacity Building

NBRC is in a position to facilitate leadership development and capacity building across the region. To do this, NBRC can build learning networks across partners, including LDDs and other local-based economic organizations. In addition, NBRC is in a position to build coalitions across regional strategic partners, including 'secondary stakeholders' in ancillary service areas such as academia, philanthropy, social services, and state agencies operating adjacent to economic development.

THREATS

Funding and Policy Uncertainty

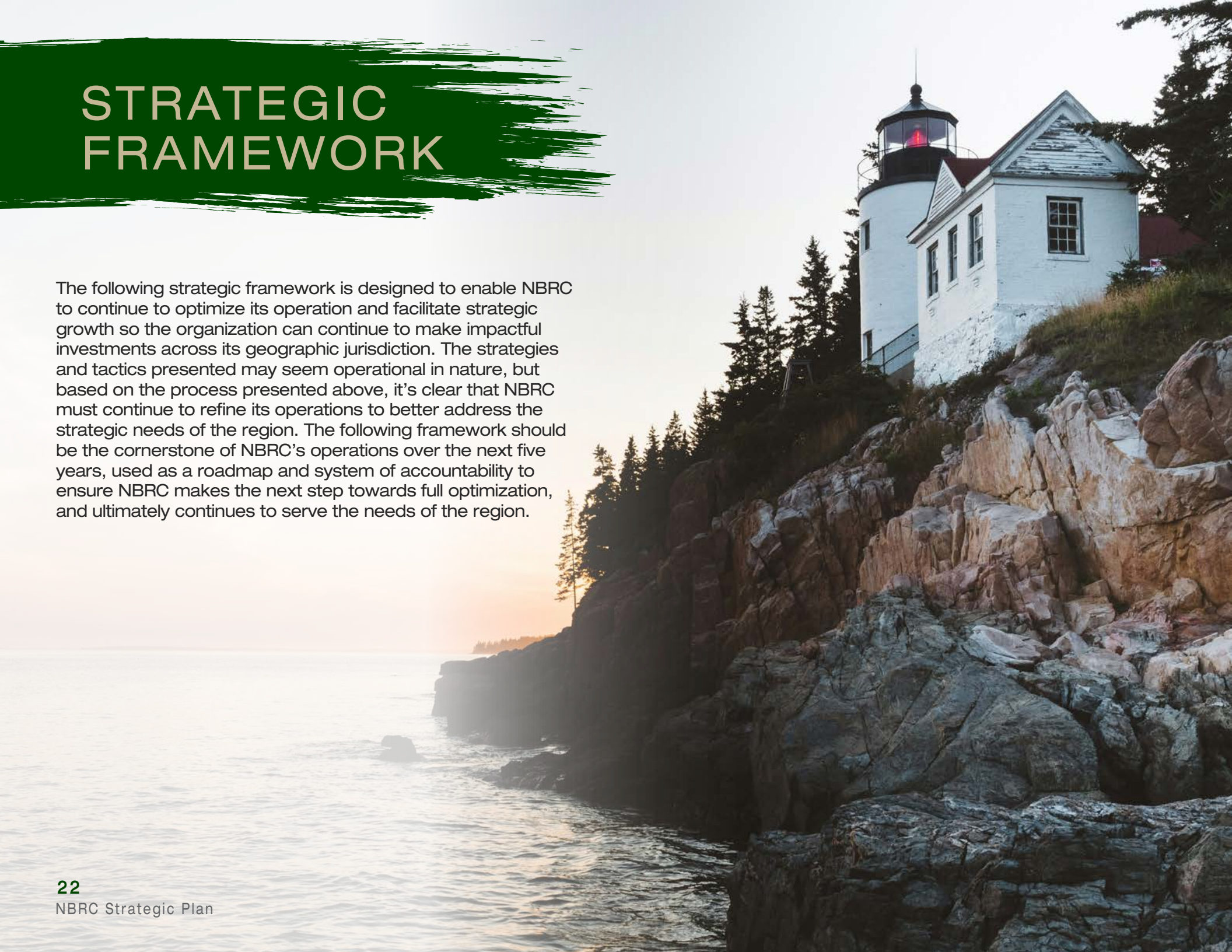
As a federal-state partnership, NBRC must remain aware of the potential challenges navigating political transitions. Shifting policy and funding priorities at the federal and state level are natural occurrences and must be navigated with care. The political realities associated with these transitions can lead to funding allocation disputes, budgetary uncertainties, policy stagnation, inconsistent goals and objectives, strained collaboration, and delayed decision making. All of which could impact NBRC's ability to allocate impact focused funding in efficient and consistent ways.

Climate Change

Climate resiliency must be a strategic priority for all communities across the northern border region. With increased temperatures and extreme weather events, industries like agriculture, forestry, and tourism will continue to need to adapt to changing conditions. These realities will force NBRC to continue to adapt and adjust strategies and funding priorities to best meet the needs of the region. However, NBRC must be careful not to let this subsume all its resources and focus at the expense of other critical funding areas. A delicate balance must be developed to ensure NBRC is playing an appropriately supportive role in the face of a changing climate, partnering with established state and federal agencies and programs, while maintaining its role as a supportive partner for other economic development initiatives.

STRATEGIC FRAMEWORK

The following strategic framework is designed to enable NBRC to continue to optimize its operation and facilitate strategic growth so the organization can continue to make impactful investments across its geographic jurisdiction. The strategies and tactics presented may seem operational in nature, but based on the process presented above, it's clear that NBRC must continue to refine its operations to better address the strategic needs of the region. The following framework should be the cornerstone of NBRC's operations over the next five years, used as a roadmap and system of accountability to ensure NBRC makes the next step towards full optimization, and ultimately continues to serve the needs of the region.



FOCUS AREA 1: COMMUNICATION AND COLLABORATION

NBRC is committed to creating robust communications networks that facilitate more opportunities for the communities it serves. These networks will build awareness and increase access to NBRC funding programs and support services. The NBRC will play a central role in catalyzing collaboration across the region, enhancing information sharing, fostering stronger and more meaningful relationships across disparate stakeholder groups, and positively contribute by facilitating more economic opportunities across the region.

Strategy 1.1: Build and strengthen strategic relationships across the NBRC region.

Tactic 1.1.1 Take intentional steps to foster more connections and organic conversations between NBRC state representatives, creating opportunities to explore and identify cross-state and regional investment opportunities.

Tactic 1.1.2: Build networks and facilitate connections between NBRC state agencies beyond traditional Commerce and Economic Development agencies, including Healthcare, Transportation, Public Works, and Workforce Development agencies, and other relevant quasi-governmental authorities.

Tactic 1.1.3: Develop formal and informal collaborative networks with 'secondary stakeholders,' including education, academia, job training, philanthropy, social services, and subject matter experts.

Strategy 1.2: Activate an integrated marketing, communications, and stakeholder outreach strategy.

Tactic 1.2.1: Develop a system to measure the success, visibility, and impact of NBRC's communications and marketing strategy. Consider establishing key performance indicators to measure the success of NBRC's integrated marketing campaign.

Tactic 1.2.2: Integrate a strategy to 'Tell the Story of NBRC.' This could include multi-media content that showcases the work of NBRC and the communities it serves.

Tactic 1.2.3: Incorporate a strategy to distribute information to regional stakeholders, including information about emerging trends impacting the NBRC region, research conducted by regional stakeholders, and policy and legislative updates relevant to NBRC stakeholders.

Tactic 1.2.4: Implement a defined outreach strategy to ensure that NBRC is 'meeting people where they are.' This can include site visits to view selected projects before, during, or after completion, facilitating opportunities to foster meaningful engagement with grantees and partners. Additionally, NBRC should look for opportunities to facilitate connections with state partners and additional relevant local and regional economic development stakeholders.

FOCUS AREA 2: FUNDING AND PROGRAMS

NBRC is committed to offering funding programs that make a positive impact on the communities it serves. To continue to evolve as a funding source, NBRC is committed to helping stakeholders leverage and diversify funding sources to ensure success. The commission will continue to look for new ways to invest in more communities, increase the impact of its investments, and continue to set the standard as the most responsive, flexible, and nimble source of government funding in the region.

Strategy 2.1: Take an active leadership role in convening relevant regional funding partners to foster a more collaborative funding ecosystem across the region.

Tactic 2.1.1: Formalize, leverage, and take an active role in existing coalitions of relevant federal, state, quasi-governmental, philanthropic, and private funders. Consider facilitating regular and consistent meetings to ensure agencies are aligned, leveraging available funding sources, and increasing collaboration to support impactful projects across the northern border region.

Tactic 2.1.2: Collaborate with states to develop financial assistance programs, funding guarantee programs, and matching grants to help distressed communities overcome their inability to raise required matching funding.

Tactic 2.1.3: Increase the visibility and access to complimentary federal and state funding sources on the website and in marketing collateral and stakeholder correspondence.

Strategy 2.2: Within statutory limitations, embrace the role as a creative, nimble, and agile funding source.

Tactic 2.2.1: Develop a system that allows NBRC to launch pilot funding programs in a highly responsive manner to meet the emerging economic challenges facing the region.

Tactic 2.2.2: Implement continuous learning and evaluation mechanisms to review funding program eligibility, application processes, and award management requirements, to ensure funding programs are nimble enough to meet the evolving needs of the region.

FOCUS AREA 3: SYSTEMS AND PROCESSES

To facilitate transformative change, NBRC will embrace and integrate cutting edge technology, innovative systems, and refined processes to deliver high impact results across the region. A commitment to continuous improvement will unlock the full potential of the commission, improving access, fostering stronger partnerships, and improve the user experience for applicants and funding recipients alike.

Strategy 3.1: Develop systems to measure and evaluate programs, program related processes, and funding impact.

Tactic 3.1.1: Implement systems that allow grant applicants to provide feedback on the application process. Consider incorporating questions about the applicant's experience applying for funds directly into grant applications. Structure this component of the application to be anonymous, to receive more truthful and candid feedback.

Tactic 3.1.2: Continue to build out the data collection and analysis capabilities at NBRC, with a particular focus on developing methodologies to better understand the economic impact of funding and grant awards.

Strategy 3.2: Utilize technology to enhance the user experience for grant applicants and recipients.

Tactic 3.2.1: Develop a process to annually evaluate and improve the utilization of the organization's grant management system. Integrate new solutions to continue to optimize the system to meet the internal and external needs of the organization.

Tactic 3.2.2: Evaluate and improve application requirements on an annual basis to enhance access and usability for applicants. Consider technological solutions, including embedding video tutorials into online applications.

FOCUS AREA 4: DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY

NBRC recognizes that diversity is the cornerstone of vibrant communities and prosperous economies. NBRC is committed to fostering equity, inclusion, and accessibility across the region by cultivating a more diverse workforce within the commission and forging stronger and more meaningful relationships with representatives of underserved communities across the region.

Strategy 4.1: Take intentional steps to build meaningful relationships with representatives from underserved communities.

Tactic 4.1.1: Conduct a barriers analysis to identify potential challenges for underserved communities in engaging with NBRC and accessing funding opportunities.

Tactic 4.1.2: Review funding programs on an annual basis, ensuring they are attainable for underserved communities.

Tactic 4.1.3: Develop and activate a plan to prioritize in-person site visits to underserved communities across the region. Reserve time to meet with representatives from these communities to improve understanding and build trust.

Tactic 4.1.4: Increase accessibility and visibility of NBRC funding and services by developing targeted marketing and communications strategies to reach new audiences. Consider updating program collateral with different language translations and ensure website and other collateral are ADA compliant.

Tactic 4.1.5: Create a Diversity, Equity, Inclusion and Accessibility committee, comprised of external stakeholders from across the region to maximize outreach and increase the utilization of NBRC funding. The committee should comprise representatives from underserved populations, including those from minority groups, rural representatives, LGBTQ+, veterans, and individuals with physical and mental disabilities.

Strategy 4.2: Attract and retain diverse talent to NBRC

Tactic 4.2.1: Incorporate DEIA principles into hiring practices and career pathways at the NBRC.

Tactic 4.2.2: Create an internal Diversity, Equity, Inclusion and Accessibility (DEIA) committee to develop and implement the NBRC's DEIA priorities. Particular attention should be paid to the feedback and insight garnered from the external Diversity, Equity, Inclusion, and Accessibility Committee.

Tactic 4.2.3: Develop an NBRC internship program, specifically targeting students from diverse backgrounds.

FOCUS AREA 5: CAPACITY BUILDING

To activate transformative change, local and regional partners need the appropriate capacity to accomplish their goals and aspirations. NBRC is committed to providing supportive resources and funding to ensure LDD and other capacity building partners across the region have the tools, knowledge, and abilities to not only receive NBRC funding, but are able to use NBRC funding to activate economic and community development projects and programs that will enhance the quality of life of its residents.

Strategy 5.1: Expand development pathways.

Tactic 5.1.1: Pilot and otherwise develop mechanisms to expand the breadth and depth of entities who participate in project development.

Tactic 5.1.2: Facilitate project development pathways to ensure key partners, including NBRC States, are engaged early in the project development process.

Tactic 5.1.3: Ensure performance-based and sustainable financial support to entities engaged in project development.

Strategy 5.3: Create venues and a clearinghouse to share best practices, case studies, and NBRC funded project examples.

Tactic 5.3.1: Consider hosting an annual NBRC conference to bring together regional stakeholders, award recipients, elected officials, and key strategic partners to share information, create stronger partnerships, and demonstrate models of project success.

Tactic 5.3.2: Develop systems to capture project summaries, success stories, and project highlights on a regular and consistent basis. Integrate these project summaries into marketing, communications, and stakeholder outreach.

Strategy 5.2: Create learning networks across regional stakeholder groups.

Tactic 5.2.1: Collaborate with regional universities to develop a college research initiative, designed to give university faculty, staff, and students' opportunities to address economic challenges facing the NBRC region.

Tactic 5.2.2: Create peer networks with grant recipients to learn from each other throughout project lifecycles.

Tactic 5.2.3: Consider creating a leadership institute for regional economic and community development leaders, offering them opportunities to improve organizational performance and add capacity and improve service provision to their local stakeholder organizations.

Tactic 5.2.4: Leverage technology, including emergent learning technologies and Artificial Intelligence, to enhance the human capacity of partners, stakeholders, and economic development organizations in the NBRC region to successfully access and administer grant funds.

Appendix A: Summary of Economic Conditions

INTRODUCTION

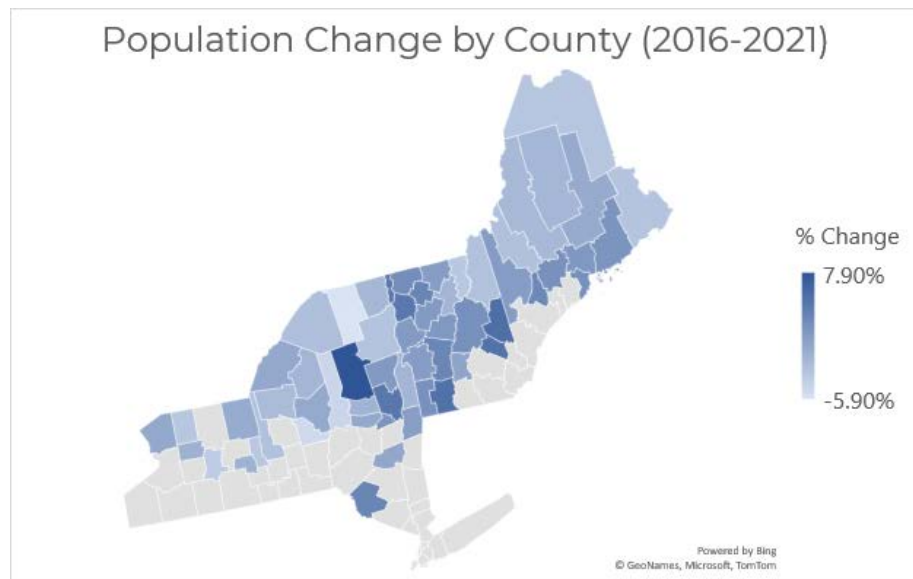
Demographic and workforce data can be helpful for illuminating shifting conditions within the region. By some measures, there is much variability from county to county; by others, unifying themes appear as defining characteristics of the region. Ultimately, the data can be used to consider how a changing population interacts with its surrounding economy, and strategies can be formulated to capitalize on those changing conditions and maximize economic growth.



POPULATION TREND

Overall, the region's population has remained relatively stable between 2016 and 2021, increasing by only about 12,000 (0.29%). Some counties have seen rapid growth, between 5% and 7% over the last 5 years, while others have seen considerable population decline over the same period.

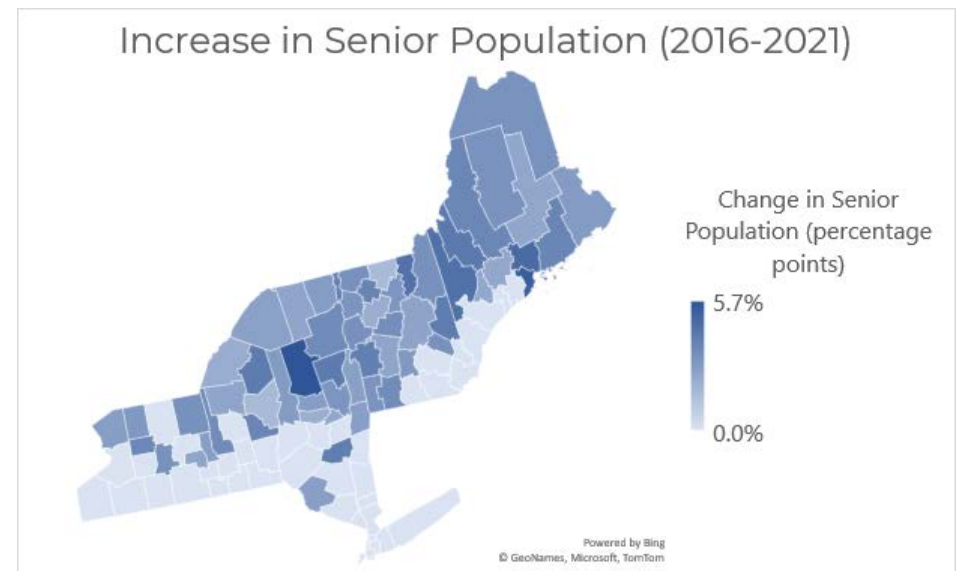
Figure 1: Population Change by County. Source: 2016 & 2021 American Community Survey 5-Year Estimates



AGING CHARACTERISTICS

Every county in the region has seen an increase in the portion of the population above 60 years old. Some counties have seen the senior population increase by more than five (5) percentage points; others have seen a more gradual shift in the age demographic. An aging population can contribute to lower labor force participation rates, increased demand for healthcare and social assistance, and increased demand for special housing.

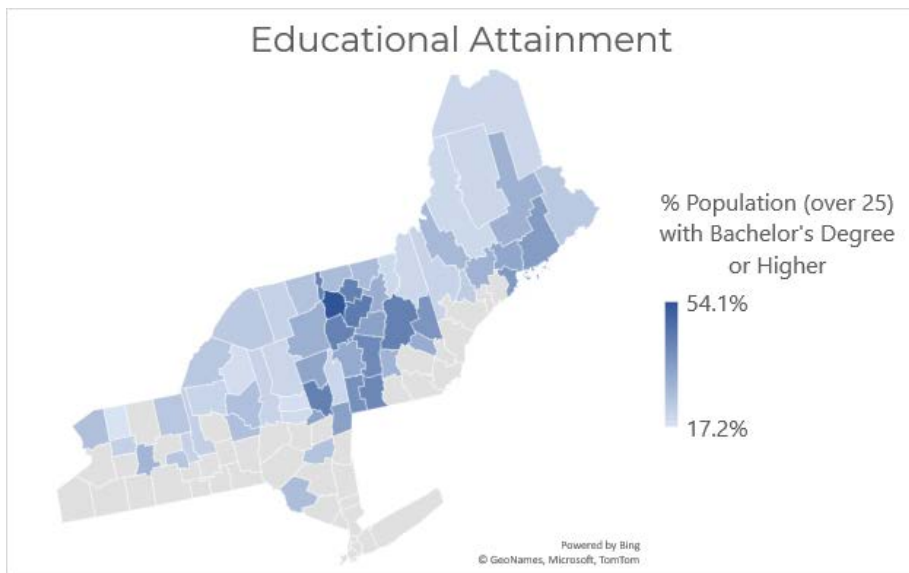
Figure 2: Increase in Senior Population. Source: 2016 & 2021 American Community Survey 5-Year Estimates



EDUCATIONAL ATTAINMENT

In an average county in the NBRC, about 28.79% of the population over the age of 25 holds a bachelor's degree or higher. However, there is wide variation throughout the region. In some highly educated counties, more than half of the population holds a bachelor's degree; in others, less than one fifth of the population does. Nationally, 35.7% of the population meets this level of education, which indicates that the general level of education in the region is relatively low. This could be a barrier to business attraction, as many industries search for a skilled workforce when exploring locations for expansion. As such, increased access to high-quality educational resources throughout the region could serve to boost economic growth.

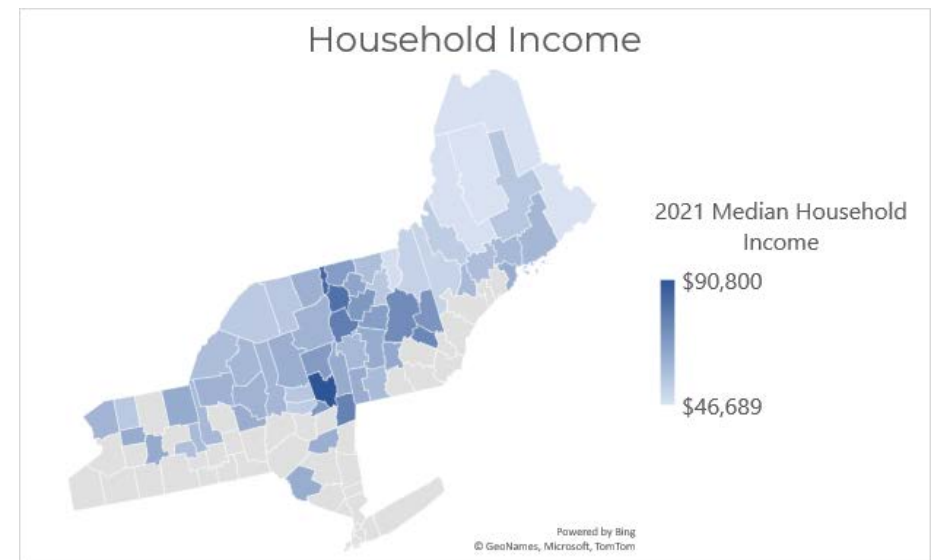
Figure 3: Educational Attainment. Source: 2021 American Community Survey 5-Year Estimates



HOUSEHOLD INCOME

The median household income at the regional level was \$62,082 in 2021. This is about \$12,800 less than the national median. As was the case with educational attainment, there is much variation in household earnings across the region. Some counties' median earnings are substantially higher than national levels, and others lag significantly. Interestingly, it can be noted that those parts of the region with higher educational attainment are closely aligned with the counties demonstrated to have higher household incomes. There are likely more opportunities for high-paying employment in areas with a highly educated population.

Figure 4: Household Income. Source: 2021 American Community Survey 5-Year Estimates

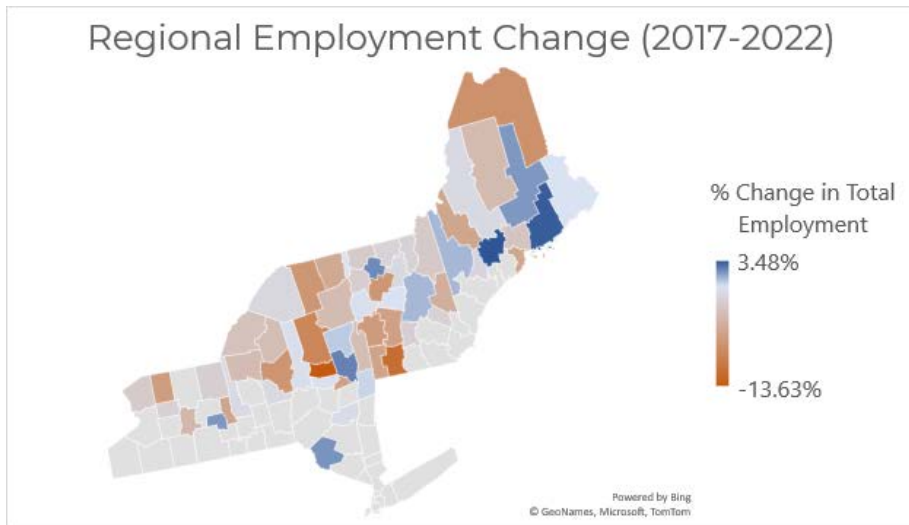


KEY INDUSTRY BREAKDOWN

All Employment

In the third quarter of 2022, there were more than 40,000 fewer jobs in the region than in 2017. Over a five-year period, total employment has fallen by about 2.5%. This is not to say that the whole region has seen falling employment levels; some have seen steady growth. The general decline in employment could be a result of COVID-19, the increasing size of the retired population, and shifting industry demand. Strategic adjustments will be required to stimulate regional job growth in a dynamic national economy.

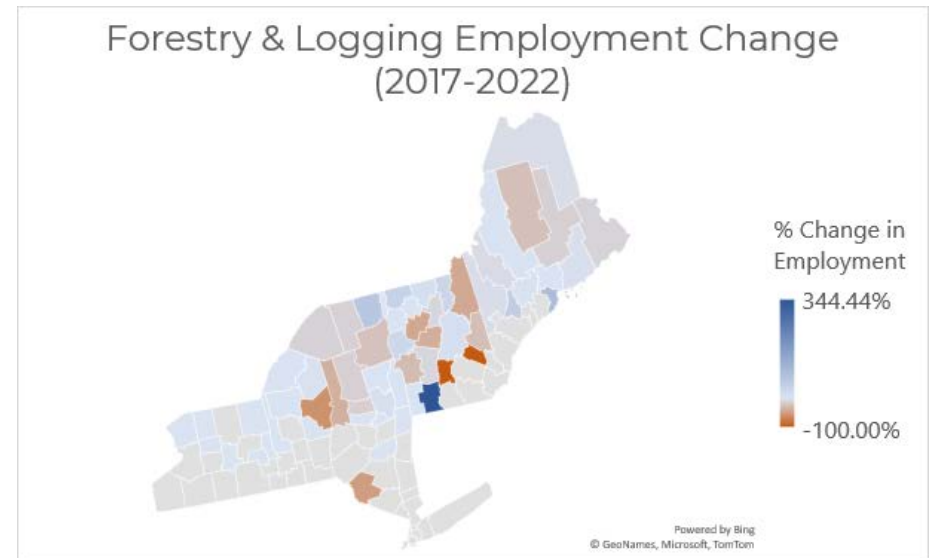
Figure 5: Regional Employment Change. Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Forestry & Logging

The Forestry & Logging industry has been a pillar of the regional economy for decades. In recent years, however, the industry has started to shrink at the national level as demand falls. A handful of counties in the region have seen significant growth in the last five years, but many more have seen a steady decrease in the number of jobs in the industry. Over the five-year period, over 200 Forestry & Logging jobs were lost in the region.

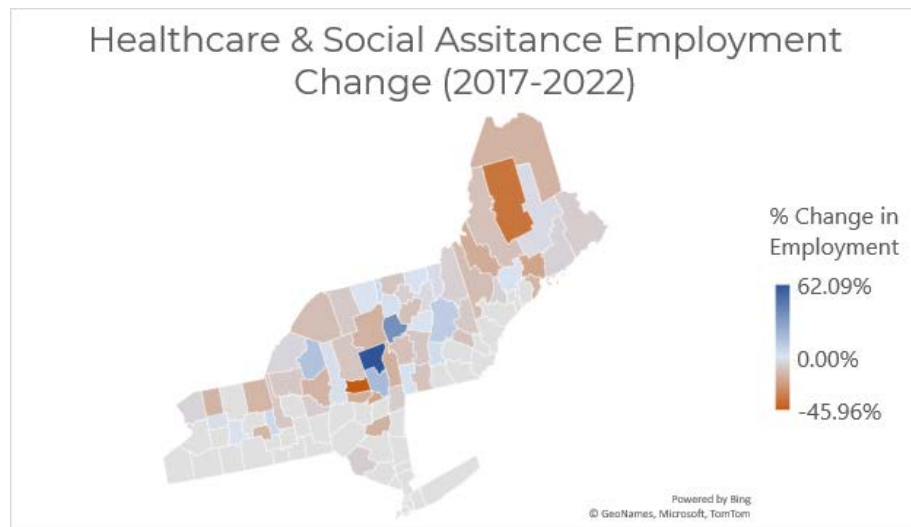
Figure 6: Forestry & Logging Employment Change. Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Healthcare & Social Assistance

The Healthcare & Social Assistance industry is an important one for the region, especially as the population ages. However, jobs in this industry fell by 17,000 (6.1%) between 2017 and 2022. While some counties have seen an increase in Healthcare and Social Assistance jobs, more have experienced a decrease. As a greater percentage of the population is over 60 years of age now than in 2017, the demand for Healthcare and Social Assistance will likely continue to increase.

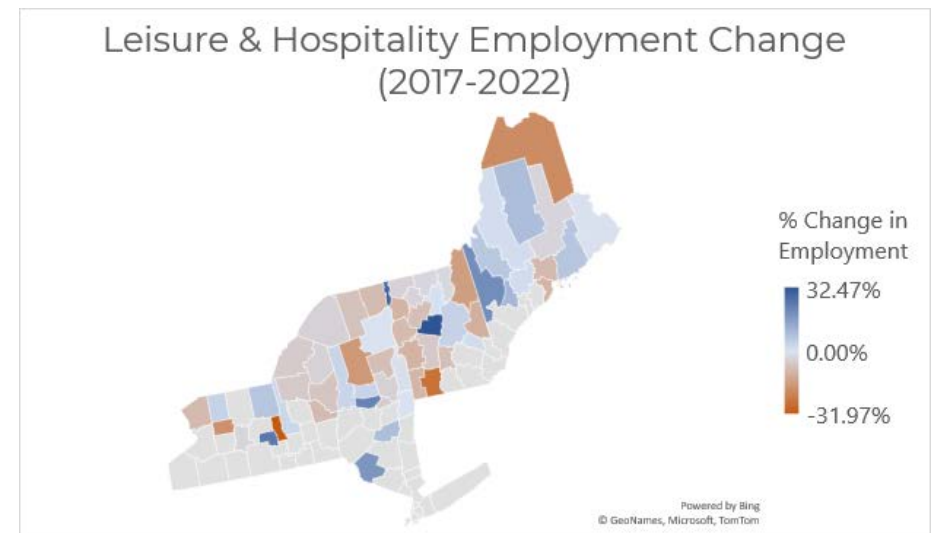
Figure 7: Healthcare & Social Assistance Employment Change. Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Leisure & Hospitality

Between 2017 and 2022, the Leisure & Hospitality industry lost about 10,000 jobs in the region, a decrease of 4.7%. This industry was sharply affected by the COVID-19 pandemic, the lingering effects of which could still be reflected in the employment data. Jobs in this industry are often accessible to a large part of the population but might not provide substantial wages or opportunity for growth.

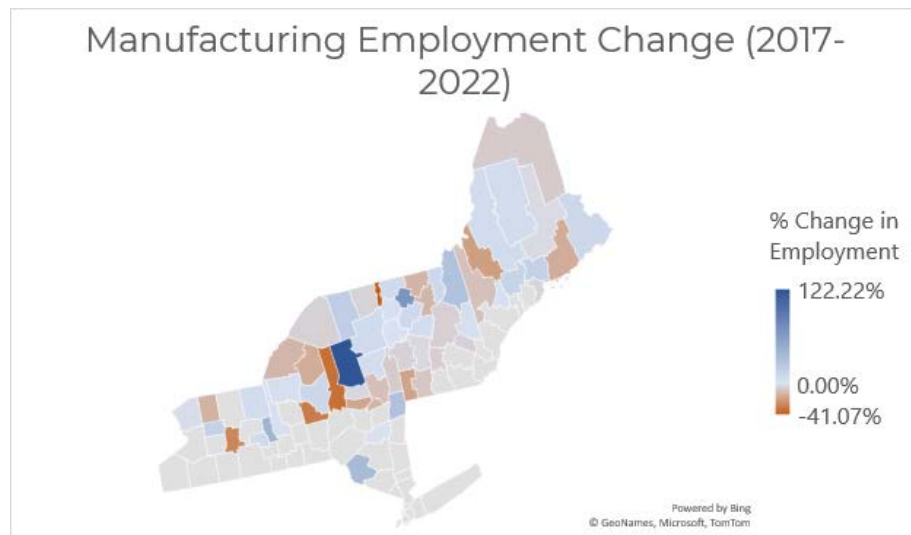
Figure 8: Leisure & Hospitality Employment Change. Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Manufacturing

The Manufacturing industry shrunk between 2017 and 2022, but by a smaller margin than some of the other industries in the region. Over the five-year period, the industry lost about 2,500 jobs (1.6%). With new developments in technology and computer science, the face of the manufacturing industry is changing. As a result, employers are demanding new skillsets rather than those that have been prioritized in the past. Over time, workforce training programs must adjust to meet the shifting needs of the industry, which will encourage further development within the region.

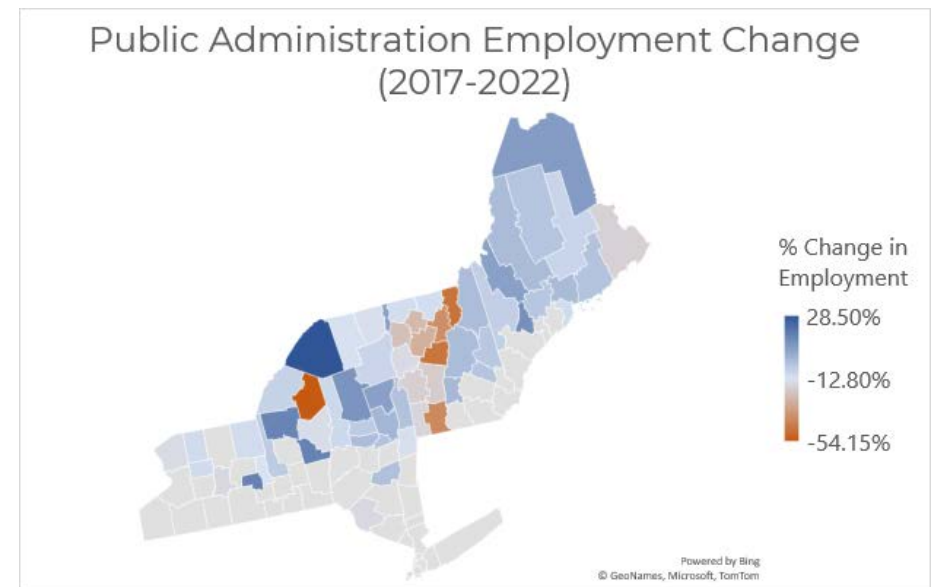
Figure 9: Manufacturing Employment Change: Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Public Administration

The Public Administration industry comprises public, government-related jobs. This industry saw a decline similar to other industries in the region between 2017 and 2022. Jobs decreased by about 10,000 (9%). A shift in broader economic conditions can be seen to affect industries across the board; no single sector is an island but operates within a larger ecosystem of both public and private actors.

Figure 10: Public Administration Employment Change. Source: 2022 Quarterly Workforce Indicator (US Census) Data.



Appendix B: Data Tables

County	2017 All Employment	2022 All Employment	% Change in Total Employment
Androscoggin County, Maine	51703	51007	-1.35%
Aroostook County, Maine	25841	23739	-8.13%
Franklin County, Maine	10599	9958	-6.05%
Hancock County, Maine	24364	25164	3.28%
Kennebec County, Maine	61201	63328	3.48%
Knox County, Maine	18493	17371	-6.07%
Oxford County, Maine	17103	17285	1.06%
Penobscot County, Maine	70204	71496	1.84%
Piscataquis County, Maine	5650	5425	-3.98%
Somerset County, Maine	17355	17181	-1.00%
Waldo County, Maine	12435	12068	-2.95%
Washington County, Maine	9654	9653	-0.01%
Belknap County, New Hampshire	28143	27668	-1.69%
Carroll County, New Hampshire	21484	20377	-5.15%
Coös County, New Hampshire	12082	11772	-2.57%
Grafton County, New Hampshire	53338	53896	1.05%
Sullivan County, New Hampshire	14261	13970	-2.04%
Addison County, Vermont	14624	14575	-0.34%
Bennington County, Vermont	17462	16366	-6.28%
Caledonia County, Vermont	10583	10466	-1.11%
Chittenden County, Vermont	102942	100740	-2.14%
Essex County, Vermont	1018	1000	-1.77%
Franklin County, Vermont	16751	16347	-2.41%
Grand Isle County, Vermont	1339	1339	0.00%
Lamoille County, Vermont	11978	12239	2.18%
Orange County, Vermont	7736	7736	0.00%
Orleans County, Vermont	10820	10645	-1.62%
Rutland County, Vermont	27968	25974	-7.13%

Washington County, Vermont	34679	32066	-7.53%
Windham County, Vermont	22056	19490	-11.63%
Windsor County, Vermont	27810	25980	-6.58%
Cayuga County, New York	25657	25433	-0.87%
Clinton County, New York	31437	29641	-5.71%
Essex County, New York	15376	14781	-3.87%
Franklin County, New York	17385	16064	-7.60%
Fulton County, New York	18624	16085	-13.63%
Genesee County, New York	24085	23651	-1.80%
Greene County, New York	14386	14287	-0.69%
Hamilton County, New York	2360	2143	-9.19%
Herkimer County, New York	16817	16757	-0.36%
Jefferson County, New York	37664	36443	-3.24%
Lewis County, New York	6925	6670	-3.68%
Livingston County, New York	20641	19741	-4.36%
Madison County, New York	21948	21741	-0.94%
Montgomery County, New York	17995	17967	-0.16%
Niagara County, New York	72464	70755	-2.36%
Oneida County, New York	108335	100051	-7.65%
Orleans County, New York	12501	11631	-6.96%
Oswego County, New York	33668	32368	-3.86%
Rensselaer County, New York	52951	53127	0.33%
St. Lawrence County, New York	32241	31854	-1.20%
Saratoga County, New York	90670	92813	2.36%
Schenectady County, New York	63228	59083	-6.56%
Seneca County, New York	12466	11692	-6.21%
Sullivan County, New York	27231	27762	1.95%
Warren County, New York	36583	36801	0.60%
Washington County, New York	15171	14609	-3.70%
Wayne County, New York	28228	27641	-2.08%
Yates County, New York	7041	7173	1.87%

Table 1: All Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.

County	Forestry & Logging Jobs (Q3 2017)	Forestry & Logging Jobs (Q3 2022)	% Change in Employment	% of Total Employment (Q3 2022)	Total Employment (Q3 2022)
Androscoggin County, Maine	36	54	50.00%	0.11%	51007
Aroostook County, Maine	532	507	-4.70%	2.14%	23739
Franklin County, Maine	159	149	-6.29%	1.50%	9958
Hancock County, Maine	38	37	-2.63%	0.15%	25164
Kennebec County, Maine	68	69	1.47%	0.11%	63328
Knox County, Maine	14	27	92.86%	0.16%	17371
Oxford County, Maine	197	189	-4.06%	1.09%	17285
Penobscot County, Maine	473	409	-13.53%	0.57%	71496
Piscataquis County, Maine	63	47	-25.40%	0.87%	5425
Somerset County, Maine	237	236	-0.42%	1.37%	17181
Waldo County, Maine	15	15	0.00%	0.12%	12068
Washington County, Maine	84	74	-11.90%	0.77%	9653
Belknap County, New Hampshire	12	0	-100.00%	0.00%	27668
Carroll County, New Hampshire	38	28	-26.32%	0.14%	20377
Coös County, New Hampshire	138	80	-42.03%	0.68%	11772
Grafton County, New Hampshire	69	75	8.70%	0.14%	53896
Sullivan County, New Hampshire	15	0	-100.00%	0.00%	13970
Addison County, Vermont	19	24	26.32%	0.16%	14575
Bennington County, Vermont	0	0	-	0.00%	16366
Caledonia County, Vermont	21	19	-9.52%	0.18%	10466
Chittenden County, Vermont	-	0	-	0.00%	100740
Essex County, Vermont	13	17	30.77%	1.70%	1000
Franklin County, Vermont	5	7	40.00%	0.04%	16347
Grand Isle County, Vermont	-	-	-	0.00%	1339
Lamoille County, Vermont	0	0	-	0.00%	12239
Orange County, Vermont	21	13	-38.10%	0.17%	7736
Orleans County, Vermont	11	12	9.09%	0.11%	10645
Rutland County, Vermont	14	10	-28.57%	0.04%	25974
Washington County, Vermont	7	4	-42.86%	0.01%	32066

Windham County, Vermont	9	40	344.44%	0.21%	19490
Windsor County, Vermont	32	29	-9.38%	0.11%	25980
Cayuga County, New York	0	0	-	0.00%	25433
Clinton County, New York	16	27	68.75%	0.09%	29641
Essex County, New York	21	16	-23.81%	0.11%	14781
Franklin County, New York	70	61	-12.86%	0.38%	16064
Fulton County, New York	21	18	-14.29%	0.11%	16085
Genesee County, New York	0	0	-	0.00%	23651
Greene County, New York	0	0	-	0.00%	14287
Hamilton County, New York	21	18	-14.29%	0.84%	2143
Herkimer County, New York	19	12	-36.84%	0.07%	16757
Jefferson County, New York	-	0	-	0.00%	36443
Lewis County, New York	104	107	2.88%	1.60%	6670
Livingston County, New York	0	0	-	0.00%	19741
Madison County, New York	0	3	-	0.01%	21741
Montgomery County, New York	-	-	-	0.00%	17967
Niagara County, New York	-	0	-	0.00%	70755
Oneida County, New York	17	7	-58.82%	0.01%	100051
Orleans County, New York	-	-	-	0.00%	11631
Oswego County, New York	0	0	-	0.00%	32368
Rensselaer County, New York	0	0	-	0.00%	53127
St. Lawrence County, New York	96	84	-12.50%	0.26%	31854
Saratoga County, New York	33	35	6.06%	0.04%	92813
Schenectady County, New York	-	-	-	0.00%	59083
Seneca County, New York	-	-	-	0.00%	11692
Sullivan County, New York	18	9	-50.00%	0.03%	27762
Warren County, New York	26	26	0.00%	0.07%	36801
Washington County, New York	0	0	-	0.00%	14609
Wayne County, New York	0	0	-	0.00%	27641
Yates County, New York	-	-	-	0.00%	7173

Table 2: Forestry & Logging Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.

County	Healthcare & Social Assistance Jobs (Q3 2017)	Healthcare & Social Assistance Jobs (Q3 2022)	% Change in Employment	% of Total Employment (Q3 2022)	Total Employment (Q3 2022)
Androscoggin County, Maine	10194	9587	-5.95%	18.80%	51007
Aroostook County, Maine	5863	4922	-16.05%	20.73%	23739
Franklin County, Maine	1754	1429	-18.53%	14.35%	9958
Hancock County, Maine	3136	2949	-5.96%	11.72%	25164
Kennebec County, Maine	11226	11271	0.40%	17.80%	63328
Knox County, Maine	2856	2429	-14.95%	13.98%	17371
Oxford County, Maine	2794	2434	-12.88%	14.08%	17285
Penobscot County, Maine	16569	16063	-3.05%	22.47%	71496
Piscataquis County, Maine	1353	853	-36.95%	15.72%	5425
Somerset County, Maine	2905	2575	-11.36%	14.99%	17181
Waldo County, Maine	1688	1335	-20.91%	11.06%	12068
Washington County, Maine	2027	1875	-7.50%	19.42%	9653
Belknap County, New Hampshire	4075	3605	-11.53%	13.03%	27668
Carroll County, New Hampshire	2773	2528	-8.84%	12.41%	20377
Coös County, New Hampshire	2395	2234	-6.72%	18.98%	11772
Grafton County, New Hampshire	12889	14167	9.92%	26.29%	53896
Sullivan County, New Hampshire	1489	1537	3.22%	11.00%	13970
Addison County, Vermont	1551	2112	36.17%	14.49%	14575
Bennington County, Vermont	3265	3300	1.07%	20.16%	16366
Caledonia County, Vermont	1679	1625	-3.22%	15.53%	10466
Chittenden County, Vermont	16470	16737	1.62%	16.61%	100740
Essex County, Vermont	76	74	-2.63%	7.40%	1000
Franklin County, Vermont	2534	2283	-9.91%	13.97%	16347
Grand Isle County, Vermont	38	40	5.26%	2.99%	1339
Lamoille County, Vermont	1797	1683	-6.34%	13.75%	12239
Orange County, Vermont	1395	1390	-0.36%	17.97%	7736
Orleans County, Vermont	1858	1864	0.32%	17.51%	10645
Rutland County, Vermont	5112	4522	-11.54%	17.41%	25974
Washington County, Vermont	5856	5171	-11.70%	16.13%	32066

Windham County, Vermont	3411	3040	-10.88%	15.60%	19490
Windsor County, Vermont	8649	7822	-9.56%	30.11%	25980
Cayuga County, New York	3876	3514	-9.34%	13.82%	25433
Clinton County, New York	5356	5356	0.00%	18.07%	29641
Essex County, New York	2189	1828	-16.49%	12.37%	14781
Franklin County, New York	4512	4124	-8.60%	25.67%	16064
Fulton County, New York	4343	2347	-45.96%	14.59%	16085
Genesee County, New York	2868	2819	-1.71%	11.92%	23651
Greene County, New York	1088	907	-16.64%	6.35%	14287
Hamilton County, New York	172	155	-9.88%	7.23%	2143
Herkimer County, New York	2344	2305	-1.66%	13.76%	16757
Jefferson County, New York	6335	6036	-4.72%	16.56%	36443
Lewis County, New York	1115	1277	14.53%	19.15%	6670
Livingston County, New York	2367	2354	-0.55%	11.92%	19741
Madison County, New York	2980	2759	-7.42%	12.69%	21741
Montgomery County, New York	4333	3589	-17.17%	19.98%	17967
Niagara County, New York	10887	10311	-5.29%	14.57%	70755
Oneida County, New York	25554	21558	-15.64%	21.55%	100051
Orleans County, New York	1463	1233	-15.72%	10.60%	11631
Oswego County, New York	4508	4093	-9.21%	12.65%	32368
Rensselaer County, New York	9956	9193	-7.66%	17.30%	53127
St. Lawrence County, New York	6489	5666	-12.68%	17.79%	31854
Saratoga County, New York	10176	11972	17.65%	12.90%	92813
Schenectady County, New York	12699	10043	-20.92%	17.00%	59083
Seneca County, New York	824	865	4.98%	7.40%	11692
Sullivan County, New York	7067	6538	-7.49%	23.55%	27762
Warren County, New York	3696	5991	62.09%	16.28%	36801
Washington County, New York	1588	1322	-16.75%	9.05%	14609
Wayne County, New York	3157	2677	-15.20%	9.68%	27641
Yates County, New York	1056	900	-14.77%	12.55%	7173

Table 3: Healthcare & Social Assistance Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.

County	Leisure & Hospitality Jobs (Q3 2017)	Leisure & Hospitality Jobs (Q3 2022)	% Change in Employment	% of Total Employment (Q3 2022)	Total Employment (Q3 2022)
Androscoggin County, Maine	4156	4566	9.87%	8.95%	51007
Aroostook County, Maine	2307	1840	-20.24%	7.75%	23739
Franklin County, Maine	1665	1768	6.19%	17.75%	9958
Hancock County, Maine	5262	5606	6.54%	22.28%	25164
Kennebec County, Maine	5846	5941	1.63%	9.38%	63328
Knox County, Maine	2940	2618	-10.95%	15.07%	17371
Oxford County, Maine	2666	3185	19.47%	18.43%	17285
Penobscot County, Maine	7781	7512	-3.46%	10.51%	71496
Piscataquis County, Maine	518	562	8.49%	10.36%	5425
Somerset County, Maine	1631	1652	1.29%	9.62%	17181
Waldo County, Maine	1466	1324	-9.69%	10.97%	12068
Washington County, Maine	814	810	-0.49%	8.39%	9653
Belknap County, New Hampshire	5473	5553	1.46%	20.07%	27668
Carroll County, New Hampshire	6253	5510	-11.88%	27.04%	20377
Coös County, New Hampshire	2922	2458	-15.88%	20.88%	11772
Grafton County, New Hampshire	7070	7339	3.80%	13.62%	53896
Sullivan County, New Hampshire	1194	1094	-8.38%	7.83%	13970
Addison County, Vermont	1657	1501	-9.41%	10.30%	14575
Bennington County, Vermont	2664	2384	-10.51%	14.57%	16366
Caledonia County, Vermont	939	945	0.64%	9.03%	10466
Chittenden County, Vermont	12648	11250	-11.05%	11.17%	100740
Essex County, Vermont	115	112	-2.61%	11.20%	1000
Franklin County, Vermont	1322	1269	-4.01%	7.76%	16347
Grand Isle County, Vermont	252	326	29.37%	24.35%	1339
Lamoille County, Vermont	3464	3336	-3.70%	27.26%	12239
Orange County, Vermont	616	816	32.47%	10.55%	7736
Orleans County, Vermont	1558	1512	-2.95%	14.20%	10645
Rutland County, Vermont	3942	3503	-11.14%	13.49%	25974
Washington County, Vermont	3396	3114	-8.30%	9.71%	32066

Windham County, Vermont	3438	2531	-26.38%	12.99%	19490
Windsor County, Vermont	3889	3650	-6.15%	14.05%	25980
Cayuga County, New York	2807	2884	2.74%	11.34%	25433
Clinton County, New York	3259	2956	-9.30%	9.97%	29641
Essex County, New York	4079	4070	-0.22%	27.54%	14781
Franklin County, New York	2073	1912	-7.77%	11.90%	16064
Fulton County, New York	1282	1326	3.43%	8.24%	16085
Genesee County, New York	4487	3627	-19.17%	15.34%	23651
Greene County, New York	2700	2924	8.30%	20.47%	14287
Hamilton County, New York	927	766	-17.37%	35.74%	2143
Herkimer County, New York	2225	2298	3.28%	13.71%	16757
Jefferson County, New York	5640	5329	-5.51%	14.62%	36443
Lewis County, New York	688	659	-4.22%	9.88%	6670
Livingston County, New York	2571	2491	-3.11%	12.62%	19741
Madison County, New York	2590	2345	-9.46%	10.79%	21741
Montgomery County, New York	865	1054	21.85%	5.87%	17967
Niagara County, New York	12244	11078	-9.52%	15.66%	70755
Oneida County, New York	14474	13452	-7.06%	13.45%	100051
Orleans County, New York	876	909	3.77%	7.82%	11631
Oswego County, New York	4576	4305	-5.92%	13.30%	32368
Rensselaer County, New York	5388	5388	0.00%	10.14%	53127
St. Lawrence County, New York	3075	2948	-4.13%	9.25%	31854
Saratoga County, New York	14837	14231	-4.08%	15.33%	92813
Schenectady County, New York	6296	5947	-5.54%	10.07%	59083
Seneca County, New York	2640	1796	-31.97%	15.36%	11692
Sullivan County, New York	3263	3835	17.53%	13.81%	27762
Warren County, New York	8359	7658	-8.39%	20.81%	36801
Washington County, New York	930	923	-0.75%	6.32%	14609
Wayne County, New York	1979	2112	6.72%	7.64%	27641
Yates County, New York	624	776	24.36%	10.82%	7173

Table 4: Leisure & Hospitality Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.

County	Manufacturing Jobs (Q3 2017)	Manufacturing Jobs (Q3 2022)	% Change in Employment	% of Total Employment (Q3 2022)	Total Employment (Q3 2022)
Androscoggin County, Maine	5251	5355	1.98%	10.50%	51007
Aroostook County, Maine	2841	2633	-7.32%	11.09%	23739
Franklin County, Maine	1256	999	-20.46%	10.03%	9958
Hancock County, Maine	1167	979	-16.11%	3.89%	25164
Kennebec County, Maine	2796	3176	13.59%	5.02%	63328
Knox County, Maine	1644	1569	-4.56%	9.03%	17371
Oxford County, Maine	2416	2172	-10.10%	12.57%	17285
Penobscot County, Maine	2892	2814	-2.70%	3.94%	71496
Piscataquis County, Maine	1148	1217	6.01%	22.43%	5425
Somerset County, Maine	2761	2935	6.30%	17.08%	17181
Waldo County, Maine	1157	1332	15.13%	11.04%	12068
Washington County, Maine	935	1022	9.30%	10.59%	9653
Belknap County, New Hampshire	2560	2423	-5.35%	8.76%	27668
Carroll County, New Hampshire	858	891	3.85%	4.37%	20377
Coös County, New Hampshire	615	789	28.29%	6.70%	11772
Grafton County, New Hampshire	4816	4534	-5.86%	8.41%	53896
Sullivan County, New Hampshire	3189	2986	-6.37%	21.37%	13970
Addison County, Vermont	1758	1766	0.46%	12.12%	14575
Bennington County, Vermont	2403	1949	-18.89%	11.91%	16366
Caledonia County, Vermont	1300	1125	-13.46%	10.75%	10466
Chittenden County, Vermont	9294	9505	2.27%	9.44%	100740
Essex County, Vermont	140	153	9.29%	15.30%	1000
Franklin County, Vermont	2454	2647	7.86%	16.19%	16347
Grand Isle County, Vermont	56	33	-41.07%	2.46%	1339
Lamoille County, Vermont	507	843	66.27%	6.89%	12239
Orange County, Vermont	638	676	5.96%	8.74%	7736
Orleans County, Vermont	1364	1173	-14.00%	11.02%	10645
Rutland County, Vermont	3180	3017	-5.13%	11.62%	25974
Washington County, Vermont	2156	2322	7.70%	7.24%	32066

Windham County, Vermont	2428	2220	-8.57%	11.39%	19490
Windsor County, Vermont	1823	1770	-2.91%	6.81%	25980
Cayuga County, New York	3498	3462	-1.03%	13.61%	25433
Clinton County, New York	3361	3199	-4.82%	10.79%	29641
Essex County, New York	872	932	6.88%	6.31%	14781
Franklin County, New York	378	448	18.52%	2.79%	16064
Fulton County, New York	1786	1723	-3.53%	10.71%	16085
Genesee County, New York	3173	3658	15.29%	15.47%	23651
Greene County, New York	713	718	0.70%	5.03%	14287
Hamilton County, New York	9	20	122.22%	0.93%	2143
Herkimer County, New York	2591	1703	-34.27%	10.16%	16757
Jefferson County, New York	2120	1837	-13.35%	5.04%	36443
Lewis County, New York	1345	1128	-16.13%	16.91%	6670
Livingston County, New York	2314	1673	-27.70%	8.47%	19741
Madison County, New York	3120	2165	-30.61%	9.96%	21741
Montgomery County, New York	3273	2672	-18.36%	14.87%	17967
Niagara County, New York	9406	9247	-1.69%	13.07%	70755
Oneida County, New York	8989	9901	10.15%	9.90%	100051
Orleans County, New York	2222	1904	-14.31%	16.37%	11631
Oswego County, New York	3172	3270	3.09%	10.10%	32368
Rensselaer County, New York	4291	5559	29.55%	10.46%	53127
St. Lawrence County, New York	2229	2110	-5.34%	6.62%	31854
Saratoga County, New York	8737	7810	-10.61%	8.41%	92813
Schenectady County, New York	5650	4856	-14.05%	8.22%	59083
Seneca County, New York	1615	2260	39.94%	19.33%	11692
Sullivan County, New York	1335	1794	34.38%	6.46%	27762
Warren County, New York	3157	3312	4.91%	9.00%	36801
Washington County, New York	2788	2588	-7.17%	17.72%	14609
Wayne County, New York	5621	5940	5.68%	21.49%	27641
Yates County, New York	1406	1500	6.69%	20.91%	7173

Table 5: Manufacturing Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.

County	Public Administration Jobs (Q3 2017)	Public Administration Jobs (Q3 2022)	% Change in Employment	% of Total Employment (Q3 2022)	Total Employment (Q3 2022)
Androscoggin County, Maine	1235	1371	11.01%	2.69%	51007
Aroostook County, Maine	835	900	7.78%	3.79%	23739
Franklin County, Maine	324	345	6.48%	3.46%	9958
Hancock County, Maine	699	673	-3.72%	2.67%	25164
Kennebec County, Maine	8506	8119	-4.55%	12.82%	63328
Knox County, Maine	954	852	-10.69%	4.90%	17371
Oxford County, Maine	638	593	-7.05%	3.43%	17285
Penobscot County, Maine	2091	1908	-8.75%	2.67%	71496
Piscataquis County, Maine	171	164	-4.09%	3.02%	5425
Somerset County, Maine	446	440	-1.35%	2.56%	17181
Waldo County, Maine	380	375	-1.32%	3.11%	12068
Washington County, Maine	790	645	-18.35%	6.68%	9653
Belknap County, New Hampshire	1403	1346	-4.06%	4.86%	27668
Carroll County, New Hampshire	1009	960	-4.86%	4.71%	20377
Coös County, New Hampshire	1056	1039	-1.61%	8.83%	11772
Grafton County, New Hampshire	2109	2071	-1.80%	3.84%	53896
Sullivan County, New Hampshire	883	879	-0.45%	6.29%	13970
Addison County, Vermont	341	288	-15.54%	1.98%	14575
Bennington County, Vermont	433	359	-17.09%	2.19%	16366
Caledonia County, Vermont	731	452	-38.17%	4.32%	10466
Chittenden County, Vermont	3838	2946	-23.24%	2.92%	100740
Essex County, Vermont	164	88	-46.34%	8.80%	1000
Franklin County, Vermont	702	622	-11.40%	3.80%	16347
Grand Isle County, Vermont	81	86	6.17%	6.42%	1339
Lamoille County, Vermont	473	354	-25.16%	2.89%	12239
Orange County, Vermont	545	296	-45.69%	3.83%	7736
Orleans County, Vermont	474	420	-11.39%	3.95%	10645
Rutland County, Vermont	1125	913	-18.84%	3.52%	25974
Washington County, Vermont	4786	3441	-28.10%	10.73%	32066

Windham County, Vermont	926	558	-39.74%	2.86%	19490
Windsor County, Vermont	1312	1054	-19.66%	4.06%	25980
Cayuga County, New York	3234	3038	-6.06%	11.95%	25433
Clinton County, New York	2674	2300	-13.99%	7.76%	29641
Essex County, New York	1793	1634	-8.87%	11.05%	14781
Franklin County, New York	3740	3284	-12.19%	20.44%	16064
Fulton County, New York	1455	1364	-6.25%	8.48%	16085
Genesee County, New York	1642	1469	-10.54%	6.21%	23651
Greene County, New York	2553	2476	-3.02%	17.33%	14287
Hamilton County, New York	371	408	9.97%	19.04%	2143
Herkimer County, New York	1556	1404	-9.77%	8.38%	16757
Jefferson County, New York	3131	2879	-8.05%	7.90%	36443
Lewis County, New York	687	315	-54.15%	4.72%	6670
Livingston County, New York	2453	2057	-16.14%	10.42%	19741
Madison County, New York	1437	1656	15.24%	7.62%	21741
Montgomery County, New York	938	921	-1.81%	5.13%	17967
Niagara County, New York	4670	3954	-15.33%	5.59%	70755
Oneida County, New York	8144	6958	-14.56%	6.95%	100051
Orleans County, New York	1848	1654	-10.50%	14.22%	11631
Oswego County, New York	2320	2659	14.61%	8.21%	32368
Rensselaer County, New York	3824	3291	-13.94%	6.19%	53127
St. Lawrence County, New York	2249	2890	28.50%	9.07%	31854
Saratoga County, New York	4079	4093	0.34%	4.41%	92813
Schenectady County, New York	4418	4268	-3.40%	7.22%	59083
Seneca County, New York	1908	1667	-12.63%	14.26%	11692
Sullivan County, New York	3119	2623	-15.90%	9.45%	27762
Warren County, New York	2044	2179	6.60%	5.92%	36801
Washington County, New York	2328	2254	-3.18%	15.43%	14609
Wayne County, New York	2093	1868	-10.75%	6.76%	27641
Yates County, New York	439	506	15.26%	7.05%	7173

Table 6: Public Administration Employment Data. Source: Quarterly Workforce Indicators (US Census), 2023.



**Northern Border
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