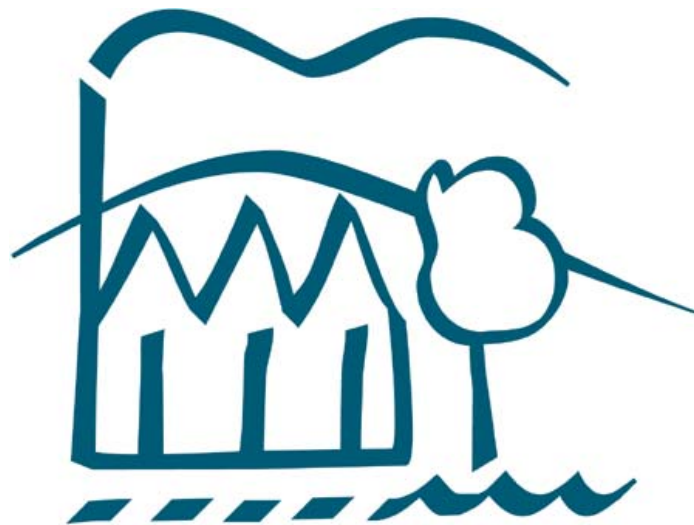

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update

2006



GENESEE/FINGER LAKES
Regional Planning Council

**City Place
50 West Main Street, Suite 8107
Rochester, New York 14614**

***Genesee-Finger Lakes
Economic Development District***

**Comprehensive Economic
Development Strategy**

2006

Prepared by the
Genesee/Finger Lakes Regional Planning Council
City Place
50 West Main Street, Suite 8107
Rochester, New York 14614

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Contract Grant Project Number: 01-83-08281

RESOLUTION NO. 2006-6

GENESEE/FINGER LAKES REGIONAL PLANNING COUNCIL

RESOLUTION

APPROVING THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

WHEREAS,

1. The area composed of the Counties of Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates and the City of Rochester is officially designated as an Economic Development District by the U. S. Department of Commerce, Economic Development Administration (EDA);
2. The Genesee Finger Lakes Regional Planning Council is the administrative and policy-making organization for the Economic Development District;
3. The Regional Planning Council is required to annually update its Comprehensive Economic Development Strategy's (CEDS) (projects and priorities).

NOW, THEREFORE, BE IT RESOLVED

1. That the Genesee Finger Lakes Regional Planning Council does hereby accept and approve the CEDS Update.
2. That the Council does formally authorize the submission of the CEDS document to the Economic Development Administration in compliance with the requirements of that agency.

June 8, 2006
Date


Chair



Mission Statement:

Genesee/Finger Lakes Regional Planning Council (G/FLRPC) will identify, define and inform its member counties of issues and opportunities critical to the physical, economic and social health of the region. G/FLRPC provides forums for discussion, debate and consensus building and develops and implements a focused action plan with clearly defined outcomes, which include programs, personnel and funding.

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Chapter 1 – Genesee-Finger Lakes Economic Development District

1.1 Introduction

The Genesee-Finger Lakes Region was designated an Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration (EDA) in 1979. This designation was based upon an initial 1978 planning document, the Overall Economic Development Program (OEDP). G/FLRPC has been awarded an annual planning grant to promote regional economic development all years subsequent to 1979.

Members in the Genesee-Finger Lakes EDD include Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates Counties and the City of Rochester.

The document presented is part of the Comprehensive Economic Development Strategy (CEDS) process. It is the successor to the OEDP and is intended to promote sustainable economic development throughout the region. All member counties and the City of Rochester participate in the District program and have elected to have the Comprehensive Economic Development Strategy document serve their planning needs and designation obligations.

The preparation of the CEDS is an ongoing process and the resulting planning document serves as a guide for G/FLRPC's annual economic development work program. In addition, the CEDS works in conjunction with other program areas provided to the region by G/FLRPC. These other program areas are discussed in greater detail in

2.3.g G/FLRPC Economic Development and Related Programs and Activities of this report.

This report provides an overview of the District's economic trends by incorporating current data from local, regional, state and federal sources. This document also details current and future efforts and projects that will be undertaken by members of the District. A discussion regarding the progress of G/FLRPC's work program to further strengthen the District's economy is also included.

Copies of the CEDS may be obtained by contacting G/FLRPC or via the internet at <http://www.gflrpc.org/ProgramAreas/EconomicDevelopment/CEDS.htm>.

1.2 Economic Development Administration

EDA, the funding source for the EDD, was created by Congress pursuant to the Public Works and Economic Development Act of 1965, as amended by the Economic Development Administration Reform Act of 1998. The EDA provides grants for infrastructure development, local capacity building, and business development to help communities alleviate conditions of substantial and persistent unemployment and underemployment in economically distressed areas and regions. The mission of the EDA

is *"to lead the federal economic development agenda by promoting innovation and competitiveness, preparing American regions for growth and success in the worldwide economy."*

In pursuing that mission, the CEDS was created as a tool and incorporates the following investment policy guidelines developed by the EDA:

- Be market-based and results-driven;
- Have strong organizational leadership;
- Advance productivity, innovation, and entrepreneurship;
- Look beyond the immediate economic horizon, anticipate economic changes, and diversify the local and regional economy; and
- Demonstrate a high degree of commitment by exhibiting.
 - High levels of local-government or nonprofit matching funds and private-sector leverage;
 - Clear and unified leadership and support by local elected officials; and
 - Strong cooperation between the business sector, relevant regional partners, and local, state, and federal governments

Planning for the District is driven by using the region's strengths to increase the number of high-skill high-wage jobs for workers in the region. The CEDS works to foster growth in the region's economy by bolstering its assets to attract private-sector investments which, in turn, increase the local and regional tax bases. The region is strong in a number of clusters and the CEDS takes into account the importance that these clusters play in the regional economy; investments are made that foster innovation and entrepreneurship within these clusters. While these clusters are embraced, efforts are made to emphasize long-term economic development planning by looking to the future and actively working to foster developing clusters and diversify the local and regional economies.

Chapter 2 – Genesee/Finger Lakes Regional Planning Council: Organizational Overview

2.1 Legal Structure

G/FLRPC is the administrative and policy-making organization for the District. The primary source of State enabling legislation for the District organization is contained in Article 12-B of the New York State General Municipal Law, which permits the establishment of regional planning boards and allows such agencies to prepare studies, reports, and plans and to provide for financial participation by various municipal entities in a regional agency. Additionally, Article 5-G of the General Municipal Law is applicable to G/FLRPC in that it provides for the performance of joint municipal cooperative activities including regional agencies.

2.2 Participating Governments

G/FLRPC consists of representatives from the nine member counties, the City of Rochester and the at-large community. With the exception of at-large representatives, the legislative bodies of the respective jurisdictions appoint Council members. At-large members are selected and appointed by the Council.

2.3 Organization of G/FLRPC

As previously mentioned, G/FLRPC has representatives from its nine member counties, the City of Rochester, local business interests and the at-large community. In addition, other appointed officials have ex-officio non-voting membership as determined by New York State law and the by-laws of G/FLRPC.

Several committees currently serve G/FLRPC. They are the general Council, the Executive Committee, the Economic Development Advisory Committee (EDAC)/Rochester/Finger Lakes Regional Development Corporation (RDC) and the Planning Coordination Committee (PCC).

G/FLRPC's members meet quarterly to discuss and review project and program progress. G/FLRPC's members are listed in Table 1 below.

2006 Comprehensive Economic Development Strategy Update

| Table 1 - Genesee/Finger Lakes Regional Planning Council | | | | |
|--|---------------------------------------|-------------------|-----------------|---------------|
| Member | Affiliation | Status | Race | Gender |
| Mary Pat Hancock | Genesee County | Ex-officio | White | Female |
| Steve Hyde | Genesee County | Voting | White | Male |
| Esther Leadley (A) | Genesee County | Voting | White | Female |
| Charles Zambito | Genesee County | Voting | White | Male |
| <i>James Duval</i> | <i>Genesee County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Marjorie Cansdale (A) | Livingston County | Voting | White | Female |
| Weston Kennison | Livingston County | Voting | White | Male |
| James Merrick | Livingston County | Ex-officio | White | Male |
| Robert Yull | Livingston County | Voting | White | Male |
| <i>Julie Marshall</i> | <i>Livingston County</i> | <i>Non-voting</i> | <i>White</i> | <i>Female</i> |
| <i>Patrick Rountree</i> | <i>Livingston County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>David Woods</i> | <i>Livingston County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Jeffrey Adair | Monroe County | Voting | White | Male |
| Maggie Brooks | Monroe County | Voting | White | Female |
| Linda Dobson | Monroe County | Voting | White | Female |
| Kal Wysokowski | Monroe County | Ex-officio | White | Female |
| Wayne Zyra | Monroe County | Ex-officio | White | Male |
| <i>Paul Johnson</i> | <i>Monroe County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>Terrence Slaybaugh</i> | <i>Monroe County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Robert Duffy | City of Rochester | Ex-officio | White | Male |
| Lois Geiss | City of Rochester | Ex-officio | White | Female |
| Brie Rathman (A) | City of Rochester | Voting | White | Female |
| <i>Carl Carballada</i> | <i>City of Rochester</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>Julio Vazquez</i> | <i>City of Rochester</i> | <i>Non-voting</i> | <i>Hispanic</i> | <i>Male</i> |
| Leslie Bamann | Ontario County | Voting | White | Female |
| Theodore Fafinski | Ontario County | Ex-officio | White | Male |
| Robert LaRocca (A) | Ontario County | Voting | White | Male |
| <i>Kristen Hughes</i> | <i>Ontario County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>Michael Manikowski</i> | <i>Ontario County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| George Bower | Orleans County | Ex-officio | White | Male |
| William Eick (A) | Orleans County | Voting | White | Male |
| Kenneth Rush | Orleans County | Voting | White | Male |
| <i>Wayne Hale</i> | <i>Orleans County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>Jim Whipple</i> | <i>Orleans County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Sharon Secor (A) | Seneca County | Voting | White | Female |
| Robert Shipley | Seneca County | Ex-officio | White | Male |
| Fred Swain | Seneca County | Voting | White | Male |
| <i>Glenn Cooke</i> | <i>Seneca County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| James Fabino | Wayne County | Voting | White | Male |
| James Hoffman | Wayne County | Ex-officio | White | Male |
| David Lyon | Wayne County | Voting | White | Male |
| <i>Margaret Churchill</i> | <i>Wayne County</i> | <i>Non-voting</i> | <i>White</i> | <i>Female</i> |
| <i>Sharon Lilla</i> | <i>Wayne County</i> | <i>Non-voting</i> | <i>White</i> | <i>Female</i> |
| Douglas Berwanger | Wyoming County | Ex-officio | White | Male |
| Jim Brick (A) | Wyoming County | Voting | White | Male |
| Jerry Davis (A) | Wyoming County | Voting | White | Male |
| Ron Smith | Wyoming County | Voting | White | Male |
| <i>Michael Hefika</i> | <i>Wyoming County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| <i>Richard Tindell</i> | <i>Wyoming County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Donald House (A) | Yates County | Voting | White | Female |
| Robert Multer | Yates County | Ex-officio | White | Male |
| Nancy Taylor | Yates County | Voting | White | Female |
| Chris Wilson (A) | Yates County | Voting | White | Male |
| <i>Steve Isaacs</i> | <i>Yates County</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |
| Wilfred Brooks | At-Large | Voting | Black | Male |
| Clyde Forbes | At-Large | Voting | Black | Male |
| Henry Herrera | At-Large | Voting | Hispanic | Male |
| <i>Richard Perrin</i> | <i>Genesee Transportation Council</i> | <i>Non-voting</i> | <i>White</i> | <i>Male</i> |

(A) Alternate

2.3.a Comprehensive Economic Development Strategy (CEDS) Committee

The Genesee/Finger Lakes Regional Planning Council members also serve as the CEDS Review Committee. Meetings to review the CEDS were held concurrently with the quarterly Council meetings. Each of the CEDS Review Committee members was invited to the Stakeholder Input sessions held on March 28, 29 and 30 through a mailing that went to their home and/or office and with a personal invitation at the March Regional Planning Council meeting. A copy of the invitation that was distributed to the CEDS Review Committee members can be found in Appendix 1. In early May, a draft copy of the CEDS was distributed to all those who attended a CEDS Stakeholder Input meeting, including many of those that serve on the CEDS Review Committee. In addition, 2 weeks prior to the discussion of the CEDS approval, a draft version of the CEDS was distributed to each of the members of the CEDS Review Committee so they would have ample time to review the document. The CEDS was discussed at the Council's Annual Meeting in June with the assistance of a summary document which can be found in Appendix 2. In addition, the minutes of that meeting are attached in Appendix 3.

The Economic Development Advisory Committee (EDAC) and Rochester/Finger Lakes Regional Development Corporation (RDC) serve as the CEDS Review Sub-committee. The CEDS was discussed at the March 9 EDAC/RDC meeting where each of the members were personally invited to the CEDS Stakeholder Input Meetings through both a mailing and oral invitations at the meeting. The minutes from the March RDC/EDAC meeting are included in Appendix 4 of this document.

The CEDS Review Committee and Subcommittee were well represented at the CEDS Stakeholder Input sessions. To learn more about those meetings and the process used, please refer to Section 6.1 of this document. In addition to the three CEDS Stakeholder meetings held, an additional meeting was held to discuss what projects would complement the US Department of Labor Workforce Innovation in Regional Economic Development (WIRED) grant that was awarded to the region. A CED/WIRED meeting was held for the WIRED Economic Development Implementation Team to discuss what regional projects would be of top priority.

2.3.b Executive Committee

The Executive Committee of the Council is responsible for the day-to-day management and policy decisions of the organization. The Executive Committee typically meets quarterly, but will meet more frequently when necessary. The Executive Committee's members are listed in Table 2.

| Table 2 - Executive Committee | | | | |
|---|---|---|-------------|---------------|
| Member | Address | Affiliation | Race | Gender |
| Esther Leadley, Chair | 11047 River Road Pavilion, NY 14525 | Legislator, Genesee County Legislature | White | Female |
| Marjorie Cansdale | 4324 Redmond Road Dansville, NY 14437 | Supervisor, Livingston County Board of Supervisors | White | Female |
| Jeffrey Adair, Treasurer | 777 Quaker Road Scottsville, NY 14546 | Legislator, Monroe County Legislature | White | Male |
| Wayne Zyra | 39 West Main Street Rochester, NY 14614 | President, Monroe County Legislature | White | Male |
| Leslie Bamann | 85 East Main Street Victor, NY 14564 | Supervisor, Town of Victor | White | Woman |
| Kenneth Rush | 1986 Main Street Waterport, NY 14571 | Legislator, Orleans County Legislature | White | Male |
| Fred Swain | 2907 Swick Road Ovid, NY 14521 | Seneca County Board of Supervisors | White | Male |
| James Hoffman | 26 Church Street Lyons, NY 14489 | Chairman, Wayne County Board of Supervisors | White | Male |
| Wyoming Representative (Currently Vacant) | | | | |
| Deborah Flood | Yates County Legislature Penn Yan, NY 14527 | Legislator, Yates County Legislature | White | Female |
| Wilfred Brooks | 98 South Pearl Street Oakfield, NY 14125 | At-Large | Black | Male |
| Steven E. Isaacs | 1 Keuka Business Park Penn Yan, NY 14527 | Chair, G/FLRPC Economic Development Advisory Committee | White | Male |
| David Woods | 6 Court Street - Room 305 Geneseo, NY 14454 | Chair, G/FLRPC Planning Coordination Committee | White | Male |

2.3.c Economic Development Advisory Committee (EDAC)

The Economic Development Advisory Committee (EDAC) was specifically designed to assist with the District's economic development program and act as the CEDS committee. Its members include one professional developer from each county, the City

of Rochester and the regional office of the Empire State Development Corporation. Each is jointly responsible for representing the interests of their respective jurisdictions, as well as the entire region. EDAC's members meet quarterly and the chair is a member of the Executive Committee. EDAC's members are listed in Table 3.

| Table 3 - Economic Development Advisory Committee (EDAC) | | | | |
|--|---|---|-------------|---------------|
| Member | Address | Affiliation | Race | Gender |
| Steve Hyde, CEO | 1 Mill Street Batavia, NY 14020 | Genesee County Economic Development Center | White | Male |
| Patrick Rountree, Director | 6 Court Street Room 306 Geneseo, NY 14454 | Livingston County Economic Development Group | White | Male |
| Terrence Slaybaugh, Director | 50 West Main Street Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development | White | Female |
| Carl Carballada, Commissioner of Economic Development | City Hall, Room 005A 30 Church Street Rochester, NY 14614 | City of Rochester Economic Development Department | White | Male |
| Michael Manikowski, Director | 20 Ontario Street Canandaigua, NY 14424 | Ontario County Office of Economic Development | White | Male |
| Jim Whipple Director of Operations | 111 West Ave. Albion, NY 14411 | Orleans Economic Development Agency | White | Male |
| Glen Cooke, Director | 1 DiPronio Drive Waterloo, NY 13165 | Seneca County Planning & Development | White | Male |
| Margaret Churchill, Executive Director | 16 William Street Lyons, NY 14489 | Wayne County Economic Development | White | Female |
| Michael Heftka, IDA Director | 6470 Route 20A Suite 4 Perry, NY 14530 | Wyoming County Industrial Development Agency | White | Male |
| Steven E. Isaacs, Executive Director, Chair | 1 Keuka Business Park Penn Yan, NY 14527 | Yates County Industrial Development Agency | White | Male |
| Jack Kinnicutt, Director - Finger Lakes Regional Office | 400 Andrews Street, Suite 710 Rochester, NY 14604 | Empire State Development | White | Male |

2.3.d Rochester/Finger Lakes Regional Development Corporation (RDC)

The Rochester/Finger Lakes Regional Development Corporation (RDC), a non-profit, also serves the District by promoting regional economic development. Quarterly

meetings of EDAC and RDC are held concurrently. Members of the RDC include those listed in Table 3 above and Table 4 below.

| Table 4 – Rochester/Finger Lakes Regional Development Corporation (RDC) | | | | |
|--|---|---|-------------|---------------|
| Member | Address | Affiliation | Race | Gender |
| Brian R. Anderson, Senior Economic Development Representative | 300 Erie Boulevard West Syracuse, NY 13202 | Niagara Mohawk | White | Male |
| Richard Boerman, Loan Management | 6712 Ann Lee Drive North Rose, NY 14516 | Regional Development Corporation | White | Male |
| Dana Brunett, President | 400 East Avenue Rochester, NY 14607 | The Enterprise Center, Rural Opportunities, Inc. | White | Male |
| Margaret DelPlato, Economic Development Specialist | City Place 50 West Main Street Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development | White | Female |
| Clyde Forbes, Director of Economic Development | 89 East Avenue Rochester, NY 14649 | Rochester Gas & Electric Corporation | Black | Male |
| Steve Griffin, Vice President | 1 Mill Street Batavia, NY 14020 | Genesee County Economic Development Center | White | Male |
| Roberta Hutchinson, Assistant Director | 20 Ontario Street Canandaigua, NY 14424 | Ontario County Office of Economic Development | White | Female |
| Julie Marshall, Deputy Director | 6 Court Street Room 306 Geneseo, NY 14454 | Livingston County Economic Development Group | White | Female |
| Peter Pecor Regional Administrator | 130 West Main Street Room 200 Rochester, NY 14614 | NYS Department of Labor | White | Male |
| Richard Perrin, Executive Director | 50 W. Main Street., Suite 8112 Rochester, NY 14614 | Genesee Transportation Council | White | Male |
| Victoria Pratt, Managing Director, Business Development | 100 Chestnut Street - One HSBC Plaza Suite 1910 Rochester, NY 14604 | Greater Rochester Enterprise | White | Female |
| Thad Schofield, Manager | City Hall, Room 005A 30 Church Street Rochester, NY 14614 | City of Rochester Economic Development Department | White | Male |
| Judy Seil, Economic Development Manager | City Place 50 West Main Street Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development | White | Female |

2.3.e Planning Coordination Committee (PCC)

The Planning Coordination Committee (PCC) oversees general planning and program efforts in the District. PCC's members meet bi-monthly. Its members include the Planning Directors from the nine counties and the City of Rochester, as well as the

Director of the Metropolitan Planning Organization (MPO). The Chair of the PCC is a member of the Executive Committee. PCC's current members are listed in Table 5.

| Table 5 - Planning Coordination Committee (PCC) | | | | |
|--|--|---|-------------|---------------|
| Member | Address | Affiliation | Race | Gender |
| James Duval, Director | County Building II 3837 West Main Street Road Batavia, NY 14020 | Genesee County Department of Planning | White | Male |
| David Woods, Director, Chair | 6 Court Street - Room 305 Geneseo, NY 14454 | Livingston County Planning Department | White | Male |
| Paul Johnson, Planning Manager | 50 West Main Street, Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development | White | Male |
| Director of Planning (Currently Vacant) | City Hall, Room 010A 30 Church Street Rochester, NY 14614 | City of Rochester Department of Community Development | White | Male |
| Kris Hughes, Director | 20 Ontario Street Canandaigua, NY 14424 | Ontario County Division of Planning and Research | White | Male |
| Wayne Hale, Director | 14016 Route 31 West Albion, NY 14411 | County of Orleans Department of Planning and Development | White | Male |
| Glen Cooke, Director | 1 DiPronio Drive Waterloo, NY 13165 | Seneca County Planning & Development | White | Male |
| Sharon Lilla, Director | 9 Pearl Street Lyons, NY 14489 | Wayne County Planning Department | White | Female |
| Richard Tindell, Director | 6470 State Route 20A, Suite 4 Perry, NY 14530 | Wyoming County Department of Planning & Development | White | Male |
| Chris Wilson, Planner | 417 Liberty Street Penn Yan, NY 14527 | Yates County | White | Male |
| Richard Perrin, Executive Director | 50 W. Main Street., Suite 8112 Rochester, NY 14614 | Genesee Transportation Council | White | Male |

2.3.f Staff

All of G/FLRPC's employees are involved in the District's economic development program since all programs directly or indirectly influence the economic standing of the

region. The Council staff provides professional assistance to its member governments in support of all District programs. Council staff is listed in Table 6.

| Table 6 - District Staff | | | |
|---------------------------------|--|-------------|---------------|
| Name | Title | Race | Gender |
| Rudeen Armstrong | Business Manager | Black | Female |
| Sweta Basnet | Planner | Asian | Female |
| Joseph Bovenzi | Planner | White | Male |
| Mark Denecke | Finger Lakes Energy Smart Coordinator | White | Male |
| Greta Goldberg | Senior Planner - Economic Development & RLF Coordinator | White | Female |
| Jason Haremza | Senior Planner | White | Male |
| Chris Tortora | Planner - GIS & Remote Sensing, Data, Technology & Resource Center | White | Male |
| Brian Slack | Senior Planner | White | Male |
| David Zorn | Executive Director | White | Male |

2.3.g G/FLRPC Economic Development and Related Programs and Activities

2.3.g.i. Economic Development Planning

Economic Development services include regional economic development coordination, revolving loan fund administration, community advocacy, strategic planning, impact analyses, community revitalization, infrastructure planning and client outreach.

2.3.g.ii Energy Smart

The Finger Lakes Energy Smart program was developed by the New York State Energy Research and Development Authority and is managed by G/FLRPC in the region. The program was developed to complement the U.S. Department of Energy's Rebuild America Program. Regional energy needs are targeted through the development of a partnership that demonstrates how energy-efficiency and the diversification of energy resources create economic, environmental and social benefits in urban and rural projects.

2.3.g.iii Regional, Local & Water Resources Planning

Regional, Local & Water Resources Planning services include land use, water resources, municipal, hazard/flood mitigation, and Main Street/Community Centers planning in addition to local government support and training/workshop/conference development and coordination.

2.3gf.iii.a Aviation Planning

Aviation planning services include assessment, data and information development and strategic products designed to improve airports and the regional aviation system. These include digital products, reuse studies, land use analysis, financial plans and studies, airport business planning, capital needs assessment and management guidelines.

2.3.g.iii.b Flood and Hazard Mitigation Planning

Flood and Hazard Mitigation Planning services involve assessing risk, establishing goals, objectives, and mitigation actions, coordinating plan adoption and approval, and facilitating stakeholder and public outreach processes. G/FLRPC develops flood and hazard mitigation plans and evaluates appropriate mitigation activities to reduce or eliminate the long-term risks posed by these hazards to the communities of our region.

2.3.g.iii.c Main Street/Community Centers

G/FLRPC views the Main Streets in our region as tremendous assets and opportunities. Main Streets are seen as current, former, or potential community centers and greatly contribute to a unique sense of place. As the Regional Planning Council, G/FLRPC assists communities with Main Street and downtown issues. In addition, the redevelopment of the Erie Canal is an important element of this program. The vitality of community centers is integrally related to land use, environmental resources, economic development, zoning, and design.

2.3.g.iii.d Municipal Planning

Municipal Planning services include comprehensive planning, land use regulations and controls and a host of other planning initiatives, such as Open Space and Agricultural Plans, build-out and fiscal impact analyses and cultural resource surveys. G/FLRPC staff has knowledge and experience in a wide range of planning issues and assists and collaborates with municipal officials, staff, and citizens as needed.

2.3.g.iii.e Water Resources Planning

Water Resources Planning encompasses a variety of services, which advance the overall goal of protecting and improving water quality and quantity. As a regional agency, G/FLRPC is able to examine and coordinate water resource issues at a watershed wide level. Services include watershed management planning, wellhead protection and assistance with the implementation of state and federal regulations.

2.3.g.iv Data, Technology and Resource Center

GIS services include general mapping, needs assessments, data/database development, data conversion, digitalization, GIS/CAD and ArcMIS integration, demographic analysis, project planning & management and application development. Remote sensing services

include the classification and analysis of satellite imagery and the integration of digital ortho-imagery and aerial photography.

2.3.g.iv.a New York State Data Center Affiliate Program

The State Data Center operates through a network of Affiliate Data Centers throughout the State. These agencies maintain Census and related economic and demographic data and provide local information services to local government, business and the public.

Chapter 3 – Overview of the Genesee-Finger Lakes Region

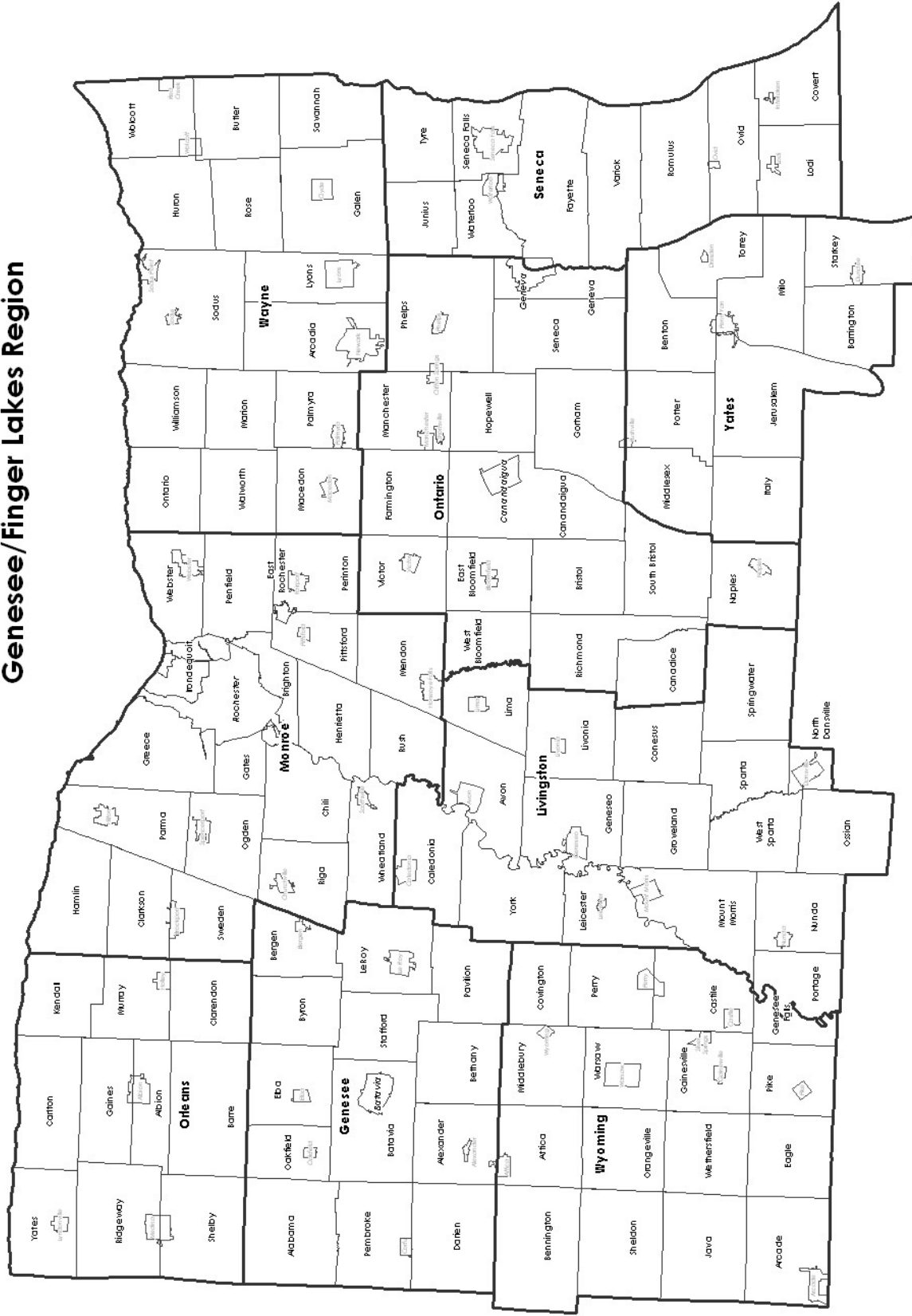
Chapter 3 provides an overview of historic, demographic, socioeconomic, and economic conditions of the District using data from federal, state and regional sources. An overview of socio-demographic information for each county and the District will be compared to Upstate New York¹, New York State and the United States.

3.1 Geography

The Genesee-Finger Lakes Region is located in west-central New York State. The Region is bordered by Lake Ontario to the north, the Southern Tier Region and foothills of the Appalachian Mountains to the south, Syracuse and the Central New York Region to the east, and the Buffalo-Niagara metropolitan area to the west. The area of the Genesee Finger Lakes Region is approximately 4,700 square miles. Map 1 shows the nine-county region.

¹ Upstate New York is defined as all counties in New York except the following: Bronx, Dutchess, Kings, Nassau, New York, Orange, Queens, Richmond, Rockland, Suffolk and Westchester.

Genesee/Finger Lakes Region



3.2 History of the Region

The Genesee-Finger Lakes region has a rich cultural, social and economic history. There are three assets that have driven the economy in the region since it was first inhabited by Europeans: land, people, and infrastructure. The land in the region is rich, which nurtured and continues to sustain a robust agricultural industry. In addition to the region's natural features, human ideas led to man-made products and projects, ranging from tapping the Genesee River for water power to the conception and construction of the Erie Canal, which gave the region a competitive advantage. Infrastructure, such as waterways and canals, railroads and a highway system were drivers of agricultural and manufacturing industries and overall growth in the region.

Settlement in the region was very attractive to farmers, due to its rich soil and moderate climate. At the turn of the nineteenth century, European investors bought land in the region and began to subdivide parcels for sale to settlers who were primarily from New England, Pennsylvania, and Eastern New York State. Agriculture was, and continues to be, important to the region through both crop production and livestock. In addition, the presence of natural resources encouraged the growth of industries that processed many of these materials. For example, saw mills were developed to process wood.

The construction of the Erie Canal has historically been one of the largest stimuli of growth in the region. Built by the State of New York at the urging of a visionary governor, Dewitt Clinton, this infrastructure project allowed the region to optimize its prime location. It transformed the regional economy from an agrarian base to one at the center of the industrial revolution. Agriculture continued as a major industry and was strengthened by the ability to effectively and efficiently ship products. The Erie Canal provided links to the Upper Midwest and Eastern seaboard, and later the railroads and highways extended those linkages, and they fostered the development of a robust amount of wholesalers and distributors in the region. This led to the growth of business support services, such as legal and accounting firms, in the region.

The natural attributes of the region, in conjunction with the physical and human infrastructure, set the framework for innovation and entrepreneurship as part of the fabric of the region. This is what drove the region to be a leader in technology, especially optics technology. For many years, the region was dominated by three large companies, Kodak, Xerox and Bausch & Lomb. The dependence of the regional economy on these three companies has diminished over the last 30 years but they laid the foundation for a place that values innovation.

The importance of education was established in the region early in its history. This was expressed through the early establishment of educational institutions ranging from local elementary schools to colleges and universities. For example, the origins of the Rochester Institute of Technology, today the region's largest university, date back to 1829, shortly after the settlement of the area.

3.3 Socio-economic Demographic Information

The socio-demographic data illustrates a picture of the region and individual counties over time. Although each of the counties does not have the same demographic composition, there are many similarities that exist that lend themselves to using a regional perspective. In the following section, socio-demographic data will be presented which will allow for a discussion of the state of the District.

3.3.a Population Trends

Monroe County, anchored by the City of Rochester, has historically had the largest population of the counties in the region. As shown by Table 7, *Population for the G-FL Region, Upstate NY, NYS and US (1950-2000)*, the most populous counties, after Monroe, have been Ontario and Wayne.

**Table 7 - Population for the G-FL Region, Upstate NY,
NYS and US (1950-2000)**

| | 1950 | 1960 | 1970 | 1980 | 1990 | 2000 |
|--------------------|----------------|----------------|------------------|------------------|------------------|------------------|
| Genesee | 47,600 | 54,000 | 58,700 | 59,400 | 60,100 | 60,400 |
| Livingston | 40,300 | 44,100 | 54,000 | 57,000 | 62,400 | 64,300 |
| Monroe | 487,600 | 586,400 | 711,900 | 702,200 | 714,000 | 735,300 |
| Ontario | 60,200 | 68,100 | 78,800 | 88,900 | 95,100 | 100,200 |
| Orleans | 29,800 | 34,200 | 37,300 | 38,500 | 41,800 | 44,200 |
| Seneca | 29,300 | 32,000 | 35,100 | 33,700 | 33,700 | 33,300 |
| Wayne | 57,300 | 68,000 | 79,400 | 84,600 | 89,100 | 93,800 |
| Wyoming | 32,800 | 34,800 | 37,700 | 39,900 | 42,500 | 43,400 |
| Yates | 17,600 | 18,600 | 19,800 | 21,500 | 22,800 | 24,600 |
| G-FL Region | 802,500 | 940,200 | 1,112,700 | 1,125,700 | 1,161,500 | 1,199,500 |

Source: US Census Bureau

Population growth in these counties has been driven by healthy industrial bases, in addition to suburban and exurban growth in the later part of the twentieth century. Yates County has historically been the smallest of the nine counties with a fairly stable population over the last 100 years.

Monroe County experienced explosive growth until 1970 when there was a decline; slight increases followed in the subsequent decades. Ontario and Wayne Counties had steady increases in population until 1950 and then robust growth from 1950 onward. In fact, growth in Ontario County has increased 27.2% from 1970-2000, compared to a regional growth rate of 7.8% for that same time period. After 1970, all counties experienced some growth with the exception of Seneca County which has experienced population decline since 1970.

3.3.b Population Growth (1980-2000)

In order to understand recent population shifts and dynamics, an analysis of population growth from 1980-2000 was compiled in Table 8, *Population Growth for the G-FL Region, Upstate NY, NYS and the US (1980-2000)*.

Table 8 - Population Growth for the G-FL Region, Upstate NY, NYS and US (1980-2000)

| | 1980 | 1990 | 2000 | Change (1980-2000) | |
|--------------------|------------------|------------------|------------------|--------------------|---------------|
| | | | | By People | By percentage |
| Genesee | 59,400 | 60,060 | 60,370 | 970 | 1.6 |
| Livingston | 57,000 | 62,372 | 64,328 | 7,328 | 12.9 |
| Monroe | 702,200 | 713,968 | 735,343 | 33,143 | 4.7 |
| City of Rochester | 241,741 | 231,636 | 219,773 | -21,968 | -9.1 |
| Ontario | 88,900 | 95,101 | 100,224 | 11,324 | 12.7 |
| Orleans | 38,500 | 41,846 | 44,171 | 5,671 | 14.7 |
| Seneca | 33,700 | 33,683 | 33,342 | -358 | -1.1 |
| Wayne | 84,600 | 89,123 | 93,765 | 9,165 | 10.8 |
| Wyoming | 39,900 | 42,507 | 43,424 | 3,524 | 8.8 |
| Yates | 21,500 | 22,810 | 24,621 | 3,121 | 14.5 |
| G-FL Region | 1,125,700 | 1,161,470 | 1,199,588 | 73,888 | 6.6 |
| Upstate NY | 7,469,000 | 7,604,000 | 7,727,800 | 258,800 | 3.5 |
| NYS | 17,558,165 | 17,990,778 | 18,976,457 | 1,418,292 | 8.1 |
| US | 226,545,805 | 248,718,297 | 281,421,906 | 54,876,101 | 24.2 |

Source: US Census Bureau

During that twenty year time period, the United States experienced explosive growth with a growth rate of 24.2%. The majority of national growth occurred in the South and Western states of the nation. The growth rate in New York State was moderate with an increase in population of 8.1%. The G-FL region grew at a rate of 6.6% during the 1980-2000 time period. This is slightly less than state growth rate and far less than national growth but more than Upstate NY. In fact, 28.5% of growth in Upstate NY can be attributed to the G-FL Region

Six counties in the G-FL region, Orleans, Yates, Livingston, Ontario, Wayne and Wyoming, had a growth rate greater than the state. The only county to experience a negative growth rate was Seneca County with a loss of 358 people, or a -1.1% decrease in population.

3.3.c Age

There are two demographic shifts about which many in Upstate New York and the Northeastern region are concerned. They are the aging population and the out migration of the 25-34 age cohort. The percentage of people over the age of 65 in the region is 13.0%, compared to 12.9% in the state and 12.4% in the nation, as illustrated by Table 9, *Age Distribution for the G-FL Region, Upstate NY, NYS and the US in 2000*. Although this is less than the 16.6% of population in Upstate NY that is over the age of 65, it does indicate that the population in the region is slightly older than the nation. Only Livingston County has a smaller percentage of the population over the age of 65 than the nation. This can be attributed to the large percentage of population derived from students at SUNY Genesee, as shown by the far higher percentage of population aged 18-24.

The decrease in the percentage of people aged 25-34 is a cause for concern in the region. This age cohort is an indicator of the number of people setting up

Table 9 - Age Distribution for the G-FL Region, Upstate NY, NYS and US in 2000 (by percentage)

| | Under 18 | 18 to 24 | 25 to 44 | 45 to 64 | 65 and over |
|--------------------|-----------------|-----------------|-----------------|-----------------|--------------------|
| Genesee | 26.1 | 7.5 | 29.5 | 22.6 | 14.3 |
| Livingston | 23.4 | 14.2 | 28.9 | 22.1 | 11.4 |
| Monroe | 25.6 | 9.5 | 29.3 | 22.6 | 13.0 |
| City of Rochester | 28.1 | 11.6 | 32.2 | 18.1 | 10.0 |
| Ontario | 25.4 | 8.3 | 28.4 | 24.8 | 13.2 |
| Orleans | 26.2 | 8.2 | 31.3 | 21.9 | 12.4 |
| Seneca | 24.8 | 7.5 | 28.8 | 23.8 | 15.1 |
| Wayne | 27.4 | 6.8 | 30.1 | 23.5 | 12.2 |
| Wyoming | 24.1 | 8.2 | 32.8 | 22.8 | 12.2 |
| Yates | 26.7 | 9.3 | 24.7 | 23.9 | 15.5 |
| G-FL Region | 25.6 | 9.2 | 29.4 | 22.8 | 13.0 |
| Upstate NY | 23.5 | 9.1 | 27.9 | 22.9 | 16.6 |
| NYS | 24.7 | 9.3 | 30.7 | 16.2 | 12.9 |
| USA | 25.7 | 9.6 | 30.2 | 22.0 | 12.4 |

Source: US Census Bureau

homes in the region. G/FLRPC performed an analysis of the change in age cohorts between 1990 and 2000 and paid close attention to the migration patterns of the 25-34 age cohort. The study rolled the cohorts between 1990 and 2000 and found that the 25-34 age cohort declined by 17,052 persons (9.9%). The decrease can be attributed mainly to out-migration.

3.3.d Educational Attainment

One resource where the G-FL region has an advantage is its high educational attainment rates. In the G-FL region, 83.8% of the population over the age of 25 has a high school diploma or higher. This is compared to 83.0% in Upstate NY, 79.1% in the state and 80.4% nationally, as illustrated by *Table 10, Educational Attainment Rates for the Nine Counties, G-FL Region, NYS and the US in 2000*.

Table 10 - Educational Attainment Rates for the G-FL Region, Upstate NY, NYS and the US in 2000 (by percentage)

| | Less than HS | HS Graduate | Some college | Associates Degree | Bachelors degree | Graduate degree or higher |
|--------------------|---------------------|--------------------|---------------------|--------------------------|-------------------------|----------------------------------|
| Genesee | 15.6 | 38.1 | 18.1 | 12 | 10.1 | 6.2 |
| Livingston | 17.6 | 33.8 | 19 | 10.3 | 11.4 | 7.9 |
| Monroe | 15.2 | 26.1 | 17.8 | 9.7 | 18.5 | 12.7 |
| City of Rochester | 27.0 | 28.6 | 16.5 | 7.7 | 12.1 | 8.0 |
| Ontario | 12.7 | 31.6 | 19.3 | 11.8 | 14.6 | 10.1 |
| Orleans | 23.6 | 39.7 | 15.9 | 7.9 | 8.2 | 4.8 |
| Seneca | 20.9 | 35.7 | 15.9 | 10.1 | 10.5 | 7 |
| Wayne | 17.8 | 36.2 | 18.7 | 10.4 | 10.7 | 6.3 |
| Wyoming | 24.4 | 38.9 | 16 | 9.2 | 7.1 | 4.4 |
| Yates | 19.9 | 36.2 | 16.9 | 8.7 | 9.4 | 8.8 |
| G-FL Region | 16.2 | 29.9 | 17.9 | 10.0 | 15.5 | 10.5 |
| Upstate NY | 17.0 | 32.2 | 17.9 | 9.5 | 13.4 | 9.9 |
| NYS | 20.9 | 27.8 | 16.8 | 7.2 | 15.6 | 11.8 |
| US | 19.6 | 28.6 | 21.0 | 6.3 | 15.5 | 8.9 |

Source: US Census Bureau

Additionally, 26.0% of people in the G-FL region have a Bachelor's degree or higher. This is higher than Upstate NY and the nation and slightly lower than the state.

Technical workers are very important in a knowledge-based economy and a good indicator of a regional economy's preparedness for such an economy is the percentage of the population with an Associate's degree. Community colleges are often the front lines for training workers for high-technology manufacturing jobs and the G-FL region is positioned well to compete as 10.0% of its population has an Associates degree, which is greater than Upstate NY, the state and the nation.

3.3.e Per Capita Income

Per capita income is the mean income computed for every man, woman and child in a particular group. It is derived by dividing the aggregate income of a particular group by the total population in that group². The per capita income in the G-FL region increased by \$882 between 1989 and 1999, as shown in Table 11, *Per Capita Income for the G-FL Region, Upstate NY, NYS and the US*.

**Table 11 - Per Capita Income (PCI) for the
G-FL Region, Upstate NY, NYS and US**

| | PCI | | Change (1989-1999) | |
|--------------------|---------------|---------------|--------------------|------------|
| | 1989* | 1999 | By Dollars | By Percent |
| Genesee | 17,025 | 18,498 | 1,473 | 8.7 |
| Livingston | 16,864 | 18,062 | 1,198 | 7.1 |
| Monroe | 21,657 | 22,821 | 1,164 | 5.4 |
| City of Rochester | 15,996 | 15,588 | -408 | -2.6 |
| Ontario | 19,565 | 21,533 | 1,968 | 10.1 |
| Orleans | 15,780 | 16,457 | 677 | 4.3 |
| Seneca | 16,627 | 17,630 | 1,003 | 6.0 |
| Wayne | 17,839 | 19,258 | 1,419 | 8.0 |
| Wyoming | 14,140 | 17,248 | 3,108 | 22.0 |
| Yates | 14,827 | 16,781 | 1,954 | 13.2 |
| G-FL Region | 20,376 | 21,258 | 882 | 4.3 |
| Upstate NY | 15,533 | 16,534 | 1,001 | 6.4 |
| New York | 22,606 | 23,389 | 783 | 3.5 |
| US | 19,380 | 21,587 | 2,207 | 11.4 |

Source: US Census Bureau

* 1989 dollars are adjusted for inflation and are expressed in 1999 dollars

The per capita income in the G-FL region is substantially higher than Upstate NY but less than the state and the nation. In 1999, the G-FL Region's per capita income was \$4,724 more than Upstate NY but \$2,131 less than the state and \$329 less than the nation.

3.3.f Poverty

Information on the percentage of people living in poverty, in conjunction with the previous data regarding per capita income, provides insight into equity issues in the region. The poverty indicators show some positive attributes about the G-FL region,

² US Census Bureau. *American Community Survey 2004 Subject Definitions*.

although the percentage of people living in poverty has increased in the 1989-1999 time period, as illustrated in Table 12, *Poverty Status for the G-FL Region, NYS and the US*.

**Table 12 - Poverty Status for the G-FL Region,
Upstate NY, NYS and US (by percentage)**

The percent of people living in poverty in the G-FL region in 1999 is less than Upstate NY, the state and the nation. All counties, with the exception of Ontario, Wyoming and Yates, experienced an increase while there was a national decrease.

| | Population in poverty | | Children in poverty | | Elderly in poverty | |
|--------------------|-----------------------|-------------|---------------------|-------------|--------------------|------------|
| | 1989 | 1999 | 1989 | 1999 | 1989 | 1999 |
| Genesee | 7.3 | 7.6 | 9.8 | 9.0 | 6.2 | 6.8 |
| Livingston | 8.5 | 10.4 | 8.3 | 9.7 | 8.5 | 6.5 |
| Monroe | 10.4 | 11.2 | 15.7 | 15.5 | 7.2 | 7.4 |
| City of Rochester | 23.5 | 25.9 | 38.4 | 37.9 | 13.3 | 15.4 |
| Ontario | 7.4 | 7.3 | 9.1 | 9.1 | 7.6 | 6.4 |
| Orleans | 9.7 | 10.8 | 13.6 | 15 | 7.9 | 5.2 |
| Seneca | 10.4 | 11.5 | 15 | 14.8 | 8.5 | 7.3 |
| Wayne | 8.3 | 8.6 | 9.8 | 10.7 | 9.6 | 9.4 |
| Wyoming | 8.5 | 8.4 | 10.3 | 11.6 | 10.3 | 5.8 |
| Yates | 13.4 | 13.1 | 18.6 | 20.9 | 10.0 | 7.1 |
| G-FL Region | 9.7 | 10.3 | 14.2 | 14.4 | 7.6 | 7.3 |
| Upstate NY | 11.0 | 11.6 | 15.0 | 15.7 | 9.8 | 7.8 |
| New York | 13.0 | 14.6 | 19.1 | 20.0 | 11.9 | 11.3 |
| US | 13.1 | 12.4 | 18.3 | 16.6 | 12.8 | 9.9 |

Source: US Census Bureau

The poverty status for children (under the age of 18 years) and elderly (65 years of age and older) illustrate the status of two of the most vulnerable populations. During the 1989-1999 time period, the percentage of children living in poverty increased in both the region and the state while it decreased nationally. All counties in the G-FL region, with the exception of Yates, had a decrease in percentage of children living below the poverty line. Additionally, all counties in the G-FL region have a smaller percentage of elderly living in poverty than the state and the nation.

3.3.g Housing

One of the positive attributes of the G-FL region is that housing prices are moderate which is reflected in both housing values and homeownership rates. According to the 2000 Census, 68.8% of homes in the G-FL region were owner-occupied. This is compared to 67.8% in Upstate NY, 56.5% in NYS and 68.7% nationally. In addition, each county in the G-FL is well above state and national averages.

Furthermore, the median value home price in the region in 2000 was \$93,021. This is substantially less than the state median home value (\$148,700) and the national median home value (\$119,600), as illustrated by Table 13, *Median Home Values and Median Gross Rents in 2000*.

**Table 13 - Median Home Values and
Median Gross Rents in 2000
(in dollars)**

| | Median Home Value | Median Gross Rent |
|--------------------|----------------------------------|------------------------------|
| Genesee | 83,200 | 517 |
| Livingston | 88,800 | 541 |
| Monroe | 98,700 | 612 |
| City of Rochester | 61,300 | 553 |
| Ontario | 94,100 | 564 |
| Orleans | 72,600 | 519 |
| Seneca | 72,400 | 521 |
| Wayne | 85,700 | 527 |
| Wyoming | 74,000 | 482 |
| Yates | 75,600 | 467 |
| G-FL Region | 93,021 | 585 |
| New York | 148,700 | 672 |
| US | 119,600 | 602 |

Source: US Census Bureau

In addition, all of the counties' median home values were substantially less than the state or the nation. The median gross rent in the region is \$585 per month, which is less than both the state and the nation. In Monroe County, where the majority of renters reside, the median gross rent per month is \$612.

3.4 Economic Profile

The Genesee-Finger Lakes Region is transitioning from an industrial economy to a service-based economy. This is illustrated through an increase in the number of firms and employment in the Retail Trade major sector and, to a certain extent, in an increase in the Health Care and Social Assistance sector. In addition, there has been a substantial loss of firms and employment in the manufacturing sector.

3.4.a. Data Sources and Constraints

The following information for the region will be presented below: employment by major sector, number of establishments, average annual wage, unemployment and agricultural economic statistics. The establishment, employment and wage data was collected from the New York State Department of Labor Quarterly Census of Employment and Wages for the years 2000 and 2004.

There are some constraints associated with Quarterly Census of Employment and Wages data. Data at the county level is suppressed for confidentiality purposes so as not to reveal too much financial information about specific companies. The confidentiality screen is employed when there are less than three employers in an industry or one employer has 80% or more of the employment in an industry. This can cause an underestimation in the number of employees and firms in a region. At a large aggregate, such as major industry sector classification, the likelihood of this occurring is slim but should still be a consideration when viewing the data. A list of major sectors and the sub sectors that are included in them can be found in Appendix 5.

This data only includes the private and public sector and data does not appear for non-profit organizations. There are several cultural institutions associated with tourism, a major industry in the region, and these may not be represented properly due to their non-profit status. Furthermore, people who are self-employed are not counted in the Quarterly Census of Employment and Wage data.

The 2000-2004 time period was chosen due to data constraints. In 1997, the industry classification system changed from Standard Industrial Codes (SIC) to the North American Industrial Classification System (NAICS). Unfortunately, the New York State Department of Labor does not publish data using NAICS until 2000. The SIC and NAICS system are not compatible making comparison of data prior to 2000 impossible.

Although the 2000-2004 period is short, there are some major events that it captures. In 2000, when the first set of data was collected, the national economy was in a boom. The high-technology sectors were growing, unemployment was very low and wages and wealth creation were high. In 2001, the economy experienced a slight recession and the technology boom slowed. In order to gain a better understanding of whether this downturn is part of a cycle or a significant change to the regional economy a longer study period would be necessary. This time period does serve as an indicator of where the G-FL economy is, where it was and how it compares to the state and the nation. This economic profile should be used with future CEDS to further measure change.

The agricultural economic data was collected from the United States Department of Agriculture, National Agricultural Statistics Service. The data includes the number of farms, acres of farmland, and cash receipts for crops, livestock and all products in 2004. This data was gathered for the nine counties in the region and New York State.

The final piece of data that was collected in this section was unemployment rates. The information was collected from the New York State Department of Labor using Local Area Unemployment Statistics data. It should be noted that there are some weaknesses in the data collection and that unemployment rates, especially during economic downturns, are often understated. This is due to two reasons. The first is that people who work part-time jobs are counted as employed and part of the labor force even though they may be seeking full-time employment. The second problem can be attributed to “discouraged” workers. These are workers who wish to work but become so discouraged by the lack of opportunities that they stop looking for employment. Once a person stops looking for work they are not considered part of the labor force. Part-time workers and “discouraged” workers cause the unemployment rate to be understated but, even with its imperfections, it can be a useful tool to track changes in the labor market.

3.4.b Employment

Employment data in the nine counties shows that the top three sectors of employment were Government, Manufacturing and Health Care and Social Assistance, respectively, in 2004, as illustrated by Table 14 - *Employment in the Nine County G-FL Region by Major Sector (2004)*.

| Table 14 - Employment in the Nine County G-FL Region by Major Sector in 2004 | | | | | |
|---|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Agriculture, Forestry, Fishing & Hunting | 1,043 | 523 | 510 | 566 | 712 |
| Mining | 62 | | 155 | 82 | 35 |
| Construction | 755 | 773 | 12,516 | 2,418 | 262 |
| Manufacturing | 2,904 | 2,174 | 61,757 | 6,951 | 1,832 |
| Wholesale Trade | 1,043 | 455 | 13,468 | 1,707 | 113 |
| Retail Trade | 2,566 | 2,676 | 40,520 | 8,534 | 1,286 |
| Transportation and Warehousing | 518 | 278 | 6,135 | 768 | 194 |
| Information | 302 | 199 | 10,618 | 667 | 102 |
| Finance and Insurance | 366 | 344 | 11,830 | 968 | |
| Real Estate and Rental and Leasing | 235 | 137 | 6,415 | 327 | 32 |
| Professional and Technical Services | 482 | 328 | 20,109 | 1,275 | 90 |
| Management of Companies and Enterprises | 72 | 38 | 9,757 | | |
| Administrative and Waste Services | 750 | 304 | 19,022 | 1,439 | 195 |
| Educational Services | 178 | 73 | 20,385 | | |
| Health Care and Social Assistance | 2,415 | 1,829 | 52,920 | 6,146 | 1,424 |
| Arts, Entertainment, and Recreation | 1,020 | 167 | 5,061 | 1,047 | 91 |
| Accommodation and Food Services | 1,818 | 1,814 | 23,981 | 3,868 | 625 |
| Other Services | 1,105 | 531 | 12,940 | 1,457 | 275 |
| Total, All Government | 5,747 | 7,128 | 49,757 | 7,779 | 4,268 |
| Unclassified | 54 | 46 | 664 | 92 | 14 |
| Total, All Private | 17,797 | 12,961 | 330,446 | 39,634 | 8,173 |
| Total, All Industries | 23,544 | 20,089 | 380,203 | 47,413 | 12,441 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

| Table 14 - Employment in the Nine County G-FL Region by Major Sector in 2004 (continued) | | | | | |
|---|---------------|--------------|----------------|--------------|------------------------|
| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
| Agriculture, Forestry, Fishing & Hunting | 100 | 1,437 | 833 | 153 | 5,877 |
| Mining | | | | | 334 |
| Construction | 298 | 1,185 | 401 | 249 | 18,857 |
| Manufacturing | 1,920 | 6,354 | 2,310 | 1,181 | 87,383 |
| Wholesale Trade | 208 | 663 | 230 | 61 | 17,948 |
| Retail Trade | 1,861 | 3,455 | 1,512 | 690 | 63,100 |
| Transportation and Warehousing | 196 | 233 | 394 | 133 | 8,849 |
| Information | 49 | 284 | 81 | 86 | 12,388 |
| Finance and Insurance | 163 | 499 | 346 | 105 | 14,621 |
| Real Estate and Rental and Leasing | 53 | 209 | 72 | 101 | 7,581 |
| Professional and Technical Services | 208 | 724 | 229 | 110 | 23,555 |
| Management of Companies and Enterprises | | 180 | | | 10,047 |
| Administrative and Waste Services | 164 | 817 | | 56 | 22,747 |
| Educational Services | 263 | 104 | 49 | | 21,052 |
| Health Care and Social Assistance | 1,535 | 2,540 | 651 | 896 | 70,356 |
| Arts, Entertainment, and Recreation | 83 | 399 | 172 | 58 | 8,098 |
| Accommodation and Food Services | 875 | 1,425 | 665 | 431 | 35,502 |
| Other Services | 227 | 624 | 471 | 534 | 18,164 |
| Total, All Government | 2,581 | 6,648 | 4,404 | 1,279 | 89,591 |
| Unclassified | | 79 | 31 | 21 | 1,001 |
| Total, All Private | 8,277 | 21,260 | 9,626 | 5,394 | 453,568 |
| Total, All Industries | 10,858 | 27,908 | 14,030 | 6,673 | 543,159 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

In fact, 16.5% of all employment in the region can be attributed to public sector employment. There are 69,562 workers in the G-FL region employed by the Local Government and most are employed by public school districts. The two counties in the region where Government is not the largest sector of employment are Monroe and Ontario Counties.

Manufacturing was a large source of employment for the region with 87,383 workers which accounts for 16.1% of regional employment and 19.5% of regional private employment. Manufacturing employment is a major source of export employment in the region. Healthcare and Social Assistance was the third largest employment sector in the region with 70,356 employed in the sector. This can be attributed to the many healthcare facilities and an aging population.

Retail Trade had 63,100 people in the sector and was the fourth largest sector of employment in the region. The number of people employed in Retail Trade is large but it can also be seen as a weakness. Retail Trade generally is not a source of export employment, although tourism is a large part of the regional economy which means that some of the Retail Trade industry can be attributed to an export industry.

The decline in both number and percentage of employment in the Manufacturing sector was a significant change in the 2000-2004 period, as shown in Table 15, *Change in Employment by Major Sector in the G-FL Region (2000-2004)*.

**Table 15 - Change in Employment by Major Sector in the G-FL Region
(2000-2004)**

| | 2000 | 2004 | Change | Percent Change |
|--|-------------|-------------|---------------|-----------------------|
| Agriculture, Forestry, Fishing & Hunting | 5,504 | 5,877 | 373 | 6.8 |
| Mining | 366 | 334 | -32 | -8.7 |
| Construction | 19,990 | 18,857 | -1,133 | -5.7 |
| Manufacturing | 110,177 | 87,383 | -22,794 | -20.7 |
| Wholesale Trade | 19,124 | 17,948 | -1,176 | -6.1 |
| Retail Trade | 65,575 | 63,100 | -2,475 | -3.8 |
| Transportation and Warehousing | 9,333 | 8,849 | -484 | -5.2 |
| Information | 12,938 | 12,388 | -550 | -4.3 |
| Finance and Insurance | 15,191 | 14,621 | -570 | -3.8 |
| Real Estate and Rental and Leasing | 7,523 | 7,581 | 58 | 0.8 |
| Professional and Technical Services | 23,942 | 23,555 | -387 | -1.6 |
| Management of Companies and Enterprises | 10,831 | 10,047 | -784 | -7.2 |
| Administrative and Waste Services | 26,496 | 22,747 | -3,749 | -14.1 |
| Educational Services | 17,087 | 21,052 | 3,965 | 23.2 |
| Health Care and Social Assistance | 67,955 | 70,356 | 2,401 | 3.5 |
| Arts, Entertainment, and Recreation | 7,146 | 8,098 | 952 | 13.3 |
| Accommodation and Food Services | 37,141 | 35,502 | -1,639 | -4.4 |
| Other Services | 16,210 | 18,164 | 1,954 | 12.1 |
| Total, All Government | 85,862 | 89,591 | 3,729 | 4.3 |
| Unclassified | 293 | 1,001 | 708 | 241.6 |
| Total, All Private | 476,063 | 453,568 | -22,495 | -4.7 |
| Total, All Industries | 561,925 | 543,159 | -18,766 | -3.3 |

Source: Quarterly Census of Employment and Wages

There was a loss of 22,794 manufacturing jobs in the four year period for a decrease of 20.7%. This accounted for most of the loss in private sector employment. Public sector jobs grew by 3,729 jobs but that could not offset the job loss in the private sector. There was a loss of 18,766 jobs in all industries. Many of the major industry sectors experienced a decline in employment between 2000 and 2004.

The largest increase between 2000 and 2004 was in Educational Services with a gain of 3,965 jobs. Educational services include private primary and secondary schools, private colleges and universities, business schools, and technical and trade schools. Public K-12 schools, colleges and universities are included in Government employment. Educational Services only include private institutions. The second largest increase in employment by major sector was in Government. Within the Government sector, the majority of jobs added was in Local Government while State Government experienced a decrease and Federal Government employment increased marginally. Other major sectors that experienced an increase in employment were Health Care and Social Assistance, Arts, Entertainment and Recreation, Other Services, Unclassified, Agriculture, Forestry, Fishing and Hunting and Real Estate and Rental and Leasing.

3.4.c Establishments

As the regional economy shifts from an industrial based economy it also shifts in the composition of establishment and establishment size. Table 16, *Number of Firms in the Nine County G-FL Region by Major Sector (2004)*, shows that there has been a shift from large establishments to smaller and medium sized ones as sources of employment.

| Table 16 - Number of Firms in the Nine County G-FL Region by Major Sector in 2004 | | | | | |
|--|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Agriculture, Forestry, Fishing & Hunting | 61 | 47 | 51 | 52 | 44 |
| Mining | 7 | | 12 | 10 | 4 |
| Construction | 136 | 149 | 1,528 | 312 | 75 |
| Manufacturing | 91 | 68 | 976 | 168 | 43 |
| Wholesale Trade | 98 | 58 | 1,126 | 153 | 18 |
| Retail Trade | 211 | 213 | 2,256 | 511 | 119 |
| Transportation and Warehousing | 36 | 33 | 299 | 52 | 26 |
| Information | 14 | 18 | 294 | 47 | 8 |
| Finance and Insurance | 58 | 58 | 1,062 | 132 | |
| Real Estate and Rental and Leasing | 42 | 42 | 727 | 80 | 12 |
| Professional and Technical Services | 85 | 90 | 1,938 | 222 | 32 |
| Management of Companies and Enterprises | 7 | 3 | 125 | | |
| Administrative and Waste Services | 40 | 47 | 856 | 119 | 20 |
| Educational Services | 15 | 6 | 248 | | |
| Health Care and Social Assistance | 135 | 120 | 1,670 | 214 | 78 |
| Arts, Entertainment, and Recreation | 29 | 30 | 256 | 72 | 15 |
| Accommodation and Food Services | 129 | 141 | 1,305 | 254 | 57 |
| Other Services | 144 | 122 | 1,807 | 273 | 83 |
| Total, All Government | 77 | 89 | 315 | 112 | 62 |
| Unclassified | 44 | 48 | 661 | 87 | 24 |
| Total, All Private | 1,383 | 1,297 | 17,202 | 2,780 | 685 |
| Total, All Industries | 1,460 | 1,386 | 17,517 | 2,892 | 747 |

Source: Quarterly Census of Employment and Wages

**Table 16 - Number of Firms in the Nine County G-FL Region by Major Sector in 2004
(continued)**

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|---------------|--------------|----------------|--------------|------------------------|
| Agriculture, Forestry, Fishing & Hunting | 12 | 101 | 60 | 21 | 449 |
| Mining | | | | | 33 |
| Construction | 60 | 254 | 80 | 75 | 2,669 |
| Manufacturing | 35 | 141 | 46 | 44 | 1,612 |
| Wholesale Trade | 26 | 84 | 31 | 14 | 1,608 |
| Retail Trade | 175 | 290 | 153 | 88 | 4,016 |
| Transportation and Warehousing | 15 | 39 | 39 | 15 | 554 |
| Information | 9 | 23 | 15 | 8 | 436 |
| Finance and Insurance | 30 | 77 | 31 | 18 | 1,466 |
| Real Estate and Rental and Leasing | 16 | 57 | 20 | 19 | 1,015 |
| Professional and Technical Services | 40 | 119 | 50 | 23 | 2,599 |
| Management of Companies and Enterprises | | 8 | | | 143 |
| Administrative and Waste Services | 22 | 97 | | 14 | 1,215 |
| Educational Services | 7 | 9 | 5 | | 290 |
| Health Care and Social Assistance | 64 | 156 | 62 | 47 | 2,546 |
| Arts, Entertainment, and Recreation | 9 | 38 | 22 | 9 | 480 |
| Accommodation and Food Services | 72 | 152 | 77 | 49 | 2,236 |
| Other Services | 54 | 177 | 87 | 62 | 2,809 |
| Total, All Government | 56 | 118 | 63 | 40 | 932 |
| Unclassified | | 81 | 27 | 15 | 987 |
| Total, All Private | 662 | 1,905 | 833 | 524 | 27,271 |
| Total, All Industries | 718 | 2,023 | 896 | 564 | 28,203 |

Source: Quarterly Census of Employment and Wages

In 2004, there were 28,203 establishments in the G-FL region and 27,271 were private sector firms. In the 2000-2004 time period, there was an increase in the number of establishments in the region by 991 which accounts for a 3.6% increase. The majority of growth in establishment size is derived from the private sector with an increase of 920 private establishments.

The Top 3 major sectors with the largest number of establishments were Retail Trade, Others Services and Construction, respectively. Retail Trade is often a leader in the number of establishments and Other Services consists of many very small firms where there are less than 5 employees but offer a very specialized service.

3.4.d Average Annual Wage

The average annual wage for the G-FL region in 2004 was \$36,306. This constitutes an increase of \$304 from the 2000 annual average wage of \$36,001, when adjusted for inflation and expressed in 2004 dollars, as illustrated in Table 17, *Average Annual Wage for the Nine County G-FL Region in 2004*.

| Table 17 - Average Annual Wage for the Nine County G-FL Region in 2004 | | | | | |
|---|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Agriculture, Forestry, Fishing & Hunting | 23,851 | 26,580 | 17,102 | 22,325 | 17,912 |
| Mining | 37,757 | | 39,595 | 39,657 | 42,793 |
| Construction | 31,950 | 33,994 | 42,325 | 37,200 | 37,526 |
| Manufacturing | 37,738 | 35,781 | 59,205 | 44,332 | 34,188 |
| Wholesale Trade | 37,807 | 34,250 | 53,490 | 48,105 | 42,392 |
| Retail Trade | 20,547 | 21,465 | 20,863 | 19,896 | 17,253 |
| Transportation and Warehousing | 32,901 | 25,641 | 29,421 | 45,466 | 24,334 |
| Information | 29,154 | 22,537 | 53,878 | 31,287 | 12,443 |
| Finance and Insurance | 40,759 | 29,550 | 58,458 | 36,056 | |
| Real Estate and Rental and Leasing | 25,743 | 21,719 | 28,051 | 23,972 | 18,772 |
| Professional and Technical Services | 34,904 | 26,360 | 47,868 | 47,525 | 21,936 |
| Management of Companies and Enterprises | 49,160 | 37,243 | 74,302 | | |
| Administrative and Waste Services | 17,352 | 18,915 | 25,915 | 23,228 | 16,522 |
| Educational Services | 22,718 | 13,747 | 44,479 | | |
| Health Care and Social Assistance | 23,551 | 24,809 | 31,517 | 28,851 | 20,971 |
| Arts, Entertainment, and Recreation | 12,680 | 12,071 | 16,848 | 16,528 | 10,438 |
| Accommodation and Food Services | 11,229 | 9,237 | 12,637 | 12,161 | 8,060 |
| Other Services | 15,837 | 22,296 | 21,060 | 16,155 | 13,494 |
| Total, All Government | 31,370 | 36,089 | 39,942 | 35,664 | 42,422 |
| Unclassified | 15,322 | 17,145 | 21,767 | 23,464 | 14,430 |
| Total, All Private | 25,515 | 25,002 | 39,207 | 29,996 | 23,201 |
| Total, All Industries | 26,945 | 28,936 | 39,303 | 30,926 | 29,795 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

| Table 17 - Average Annual Wage for the Nine County G-FL Region in 2004 (continued) | | | | | |
|---|---------------|--------------|----------------|--------------|--------------------|
| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
| Agriculture, Forestry, Fishing & Hunting | 18,633 | 22,878 | 24,635 | 15,011 | 22,196 |
| Mining | | | | | 39,605 |
| Construction | 33,276 | 33,928 | 31,864 | 23,192 | 39,699 |
| Manufacturing | 43,084 | 39,043 | 32,545 | 29,784 | 53,279 |
| Wholesale Trade | 24,450 | 41,144 | 37,400 | 30,169 | 50,431 |
| Retail Trade | 19,728 | 20,044 | 18,418 | 20,095 | 20,526 |
| Transportation and Warehousing | 30,250 | 27,895 | 25,441 | 38,699 | 30,727 |
| Information | 22,044 | 25,743 | 29,988 | 21,700 | 50,063 |
| Finance and Insurance | 33,992 | 33,367 | 44,991 | 28,728 | 54,191 |
| Real Estate and Rental and Leasing | 20,999 | 16,710 | 17,903 | 18,796 | 27,068 |
| Professional and Technical Services | 30,775 | 42,836 | 29,462 | 30,916 | 46,622 |
| Management of Companies and Enterprises | | 52,332 | | | 73,588 |
| Administrative and Waste Services | 38,036 | 22,205 | | 23,998 | 25,238 |
| Educational Services | 33,337 | 21,893 | 12,660 | | 43,863 |
| Health Care and Social Assistance | 24,615 | 22,672 | 27,297 | 23,541 | 30,013 |
| Arts, Entertainment, and Recreation | 19,718 | 11,594 | 11,966 | 12,593 | 15,747 |
| Accommodation and Food Services | 10,843 | 9,450 | 9,175 | 10,415 | 11,994 |
| Other Services | 12,497 | 17,278 | 17,162 | 18,512 | 19,857 |
| Total, All Government | 34,052 | 32,056 | 38,472 | 31,028 | 37,878 |
| Unclassified | | 17,783 | 19,066 | 13,073 | 20,680 |
| Total, All Private | 27,218 | 28,393 | 27,145 | 22,893 | 35,995 |
| Total, All Industries | 28,843 | 29,266 | 30,700 | 24,452 | 36,306 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

The increase can primarily be attributed to public sector employment. During that same time period, the average annual wage for private sector employment fell by \$166.

The third highest average annual wage by major sector was in Manufacturing. Although the sector experienced a huge loss in employment, wages have remained high and increased by \$1,561 between 2000 and 2004. This is significant, especially compared to a loss of \$166 for all private industry employment in the region. In the largest growing sector, Government, the average annual wage increased by \$2,763 and the Health Care and Social Assistance major sector increased by \$1,539.

The major sectors with the lowest wages in 2004 were Accommodation and Food Services, Arts, Entertainment and Recreation and Other Services. This may be partially attributed to the fact that these sectors are more likely to have part-time workers, thus making their wages lower since they work less. Although the part-time status of many of these positions may factor into the lower wages, it should also be noted that the average annual wage in each of these sectors fell between 2000 and 2004 in real dollars.

3.4.e Unemployment

In 2004, the unemployment rate for the region was 5.4% which constitutes an increase of 1.7 percentage points from 2000. This is illustrated in Table 18, *Unemployment Rate for the Nine County G-FL Region, NYS and the Nation (2000-2004)*.

Although there was a substantial increase, the unemployment rate for the G-FL region was lower than both New York State and the nation in 2004. Livingston, Wyoming and Orleans Counties all had unemployment rates higher than the region, state and nation.

Although the region's unemployment rate was lower than both the state and nation in 2000 and 2004, during that time period the region's unemployment rate rose faster at a 1.7% increase. This is compared to the state's rise of 1.3 percentage points and the nation's rise of 1.5 percentage points.

Table 18 - Unemployment Rate for the Nine County G-FL Region, NYS and the US (2000-2004)

| | 2004 | 2000 | Change (by percent) |
|-------------------|------|------|------------------------|
| Genesee | 5.6 | 3.9 | 1.7 |
| Livingston | 5.9 | 4.1 | 1.8 |
| Monroe | 5.2 | 3.5 | 1.7 |
| City of Rochester | 6.9 | 4.5 | 2.4 |
| Ontario | 5.0 | 3.5 | 1.5 |
| Orleans | 6.5 | 4.7 | 1.8 |
| Seneca | 5.3 | 4.3 | 1.0 |
| Wayne | 5.6 | 3.8 | 1.8 |
| Wyoming | 6.3 | 4.7 | 1.6 |
| Yates | 4.6 | 3.7 | 0.9 |
| G-FL Region | 5.4 | 3.7 | 1.7 |
| NYS | 5.8 | 4.5 | 1.3 |
| US | 5.5 | 4.0 | 1.5 |

Source: Bureau of Labor Statistics

3.4.f Agricultural Economics

The agricultural sector is very important to the G-FL region and its impact is illustrated in Table 19, *Agricultural Economic Statistics for the Nine County G-FL Region (2004)*.

**Table 19 - Agricultural Economic Statistics for
the Nine County G-FL Region (2004)**

| | Number of Farms | Farmland (Acres) | Cash Receipts (in dollars) | | |
|-------------|--------------------|---------------------|----------------------------|-------------|--------------|
| | | | Crops | Livestock | All Products |
| Genesee | 452 | 126,200 | 21,463,000 | 31,081,000 | 52,544,000 |
| Orleans | 696 | 114,200 | 24,394,000 | 34,062,000 | 58,546,000 |
| Ontario | 774 | 207,800 | 34,074,000 | 64,106,000 | 98,153,000 |
| Wayne | 739 | 213,600 | 39,289,000 | 171,549,000 | 210,838,000 |
| Livingston | 866 | 193,100 | 43,540,000 | 57,383,000 | 100,923,000 |
| Seneca | 608 | 105,800 | 50,684,000 | 9,669,000 | 60,353,000 |
| Wyoming | 559 | 176,100 | 55,716,000 | 89,706,000 | 145,422,000 |
| Monroe | 487 | 132,000 | 67,775,000 | 9,066,000 | 76,841,000 |
| Yates | 876 | 163,900 | 81,179,000 | 36,528,000 | 117,707,000 |
| G-FL Region | 6,057 | 1,432,700 | 418,114,000 | 503,150,000 | 921,327,000 |

Source: United States Department of Agriculture, National Agricultural Statistics Service

The number of farms in the G-FL region in 2004 was 6,057 and those farms constituted a total of 1,432,700 acres of farmland. In 2004, the agricultural industry in the G-FL region yielded \$921,237,000 in cash receipts for all products. In total, 25.3% of the state's cash receipts from all agricultural products came from the G-FL region. In 2004, 31.4% of the states cash receipts in crops and 21.9% in livestock came from the G-FL region.

There are some indicators that agriculture is being strengthened while others point to it being threatened. Between 2000 and 2004, there was a net loss of 56,500, or 3.8%, acres of farmland in the region. The region made up 56.5% of the state's loss in farmland. Although there was a net loss of farms and farmland, the cash receipts from farm marketings was not adversely affected. In 2000, the cash receipts from farm marketings in the G-FL region totaled \$801,186,000. In the following four year period, it increased by \$113,051,000 to \$921,237,000. The substantial increase can be attributed to a 30.3% increase in livestock cash receipts.

3.4.g Economic Analysis Tools

The following section will analyze the regional economy with economic analysis tools. The first tool used will be the economic base multiplier which measures the basic and non-basic sectors of the economy. The economic base multiplier was derived using location quotients. The location quotient approach to calculating base multipliers is somewhat flawed, as there are problems with the assumptions used to derive the equations. Please see Appendix 9 for an explanation of the assumptions used when calculating location quotients.

The economic base model divides the economy into two sectors, the basic and nonbasic. The basic sector consists of export goods and services while the nonbasic sector is goods or services sold to local markets. These two sectors of the economy are linked as demand for an economy's exports impacts the quantity of goods and services utilized internally.

The economic base multiplier allows for the estimation of the effects of external changes for demand for a region's exports. In 2004, the base multiplier for the G-FL region was 2.68 and the private base multiplier was 3.42. This means that for every job added to the export sector there was an additional 1.68 jobs added to the nonbasic sector.

Another tool used to measure the regional economy is the location quotient. Location quotients measure how specialized an industry is in a defined geographic area. The general rule concerning a location quotient is that a location quotient less than one means that the area does not specialize in the industry and must import the services or good from outside the region. This is a general rule but because it is a crude measure, the location quotient threshold should be set higher. When importation takes place, money from the local economy leaks outside of the region and weakens the local economy. Additionally, when a region has a high location quotient they specialize in a good and export it.

In 2004, the industry in which the G-FL region was the most specialized was Chemical Manufacturing, which had a location quotient of 4.76, as shown in *Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2004)*.

The strength in that industry is great but it also experienced a decrease between 2000 and 2004; the location quotient in 2000 was 5.76. Machinery Manufacturing had the second highest location quotient and Internet Publishing and Broadcasting was third. The Animal Production and the Beverage & Tobacco Product Manufacturing industry also were in the top 5 industries by location quotient in 2004.

Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2004)

| NAICS | Industry | 2004 LQ |
|-------|--|---------|
| 325 | Chemical Manufacturing | 4.76 |
| 333 | Machinery Manufacturing | 3.61 |
| 516 | Internet Publishing and Broadcasting | 3.00 |
| 112 | Animal Production | 2.45 |
| 312 | Beverage & Tobacco Product Manufacturing | 2.17 |
| 611 | Educational Services | 1.95 |
| 326 | Plastics & Rubber Products Manufacturing | 1.77 |
| 339 | Miscellaneous Manufacturing | 1.68 |
| 551 | Management of Companies and Enterprises | 1.50 |
| 445 | Food and Beverage Stores | 1.49 |
| 623 | Nursing and Residential Care Facilities | 1.48 |
| 332 | Fabricated Metal Product Manufacturing | 1.47 |
| 111 | Crop Production | 1.44 |
| 334 | Computer and Electronic Product Mfg | 1.44 |
| 712 | Museums, Parks and Historical Sites | 1.38 |

Source: Quarterly Census of Employment and Wages

Chapter 4 - Current Economic Development and Related Assets, Programs and Activities

G/FLRPC views economic development planning as a comprehensive activity with sustainable development as its core principle. This endeavor requires G/FLRPC's activities to be integrated since economic development, land use, water quality and other planning activities all work in concert to create better and stronger communities. Below is a brief description of the programs and activities in which G/FLRPC is engaged.

4.1 Regional Revolving Loan Fund

G/FLRPC believes that business owners provide the backbone for the region's economy. In an effort to support this belief, the Council and an affiliated organization provide gap financing for businesses located in the nine-county region, including the City of Rochester. G/FLRPC uses the funds to lend money to area businesses, especially small to medium sized businesses, which are becoming increasingly important for job and wealth creation in the region.

In 2004, the policies and procedures of the loan fund were revised to better reflect the needs of existing and potential customers and make the fund more financially stable after a series of issues of repayment with several loans. The *Genesee/Finger Lakes Economic Development District Management and Procedures Plan - Regional Revolving Loan Fund* was updated and an effort has been made to work more directly with clients prior to and during the application and loan closing process. In the past year, the new policies and procedures have yielded success with a greater number of loan applications that has led to a high quality, diverse loan portfolio that emphasizes job creation and business expansion.

4.2 New York State Energy Smartsm Program

The Finger Lakes Energy Smart Communities program is a network of partnerships that provide support for community based energy efficiency and renewable energy initiatives at the local and regional level. The New York State Energy Research and Development Authority (NYSERDA) provides technical and financial assistance for energy-efficiency, low income residents, and research and development of new technology through its portfolio of **New York Energy Smartsm** programs.

As the organization charged with the implementation of this program for the region, G/FLRPC facilitates energy improvement projects, hosts energy workshops, training opportunities and public forums, and develops new partnerships to promote energy efficiency and renewable energy resources. Municipalities that sign-on as partners designate neighborhoods and commercial districts that could most benefit from energy efficiency as "Energy Target Zones" to demonstrate the economic and environmental

benefits of saving energy and using renewable energy. Energy Smart Communities encourage decision-makers and community leaders to adopt energy efficiency as a means of economic growth and community development.

4.3 Workforce Innovation in Regional Economic Development (WIRED) Initiative

The G-FL region was one of 13 regions in the United States chosen for a three year \$15 million grant from the United States Department of Labor. The funding is provided through the WIRED Initiative. The goal of the WIRED Initiative is to “expand employment and advancement opportunities for American workers and catalyze the creation of high-skill and high-wage opportunities in the context of regional economies.” Along with funding, the award also brings technical assistance and access to a cadre of experts to the region.

The purpose of the WIRED Initiative is to prepare regions to compete in the knowledge-based economy where talent is a key factor to success. The initiative connects three key elements of successful regions in this competitive national and global economic environment - workforce development, innovation and entrepreneurship, and economic development. In addition, it marks the realization that success in the competitive global economy does not occur in set jurisdictional boundaries but outside of them at a multi-jurisdictional regional level.

The project was crafted by the Finger Lakes Partnership, a broad group of stakeholders, including civic, business, investor, academic, entrepreneurial and philanthropic members, which included G/FLRPC. The Partnership drafted the following mission statement to guide the proposal and project, “to transform the Finger Lakes region into a premier place in which to innovate, one that invests in entrepreneurial operations, and trains workers, empowering them to be agile, adaptable, and aligned with global opportunities.” From the mission statement, goals were set in the following four areas: Entrepreneurship, Innovation, Workforce Development and Economic Development. There are several anticipated outcomes of the project which include increased number of start-up companies, improved employer satisfaction, increased participation in training and an improved entrepreneurial environment.

4.4 Brownfield Redevelopment

According to the Environmental Protection Agency (EPA), brownfields are abandoned, idle, or under-used industrial and commercial sites where real or perceived contamination has complicated redevelopment. Brownfield work is beneficial on many levels including economic development, land use and environmental justice. Additional potential benefits of brownfield redevelopment include:

- The protection of human health and the environment;
- Increased tax base;
- Restored or replaced dilapidated buildings and sites;

- Job creation;
- Strengthened economic centers;
- Utilization of existing infrastructure; and
- Prevention of the spread of contaminants.

G/FLRPC submitted an application for a Community-wide Hazardous Substance Brownfield Assessment grant from the EPA. The proposed brownfield program has three phases which will provide an educational tool, a database of brownfield sites and an implementation plan for their remediation. In addition to the EPA grant application, G/FLRPC also submitted a grant application for a Brownfields Opportunity Areas grant from the New York State Department of State and Environmental Conservation.

The City of Rochester also has a model program for brownfield development. The city's brownfield assistance program provides support for businesses and developers that want to investigate and redevelop industrial and commercial properties. The objective of this program is to provide a way for businesses and developers to obtain environmental information needed to make redevelopment decisions without taking on the burden of paying for all of the investigation costs. In addition, the city offers financial assistance through a brownfield revolving loan fund.

4.5 Fingers Lakes Open Land Project

The Finger Lakes Land Use Project has been under development by G/FLRPC staff and the G/FLRPC Planning Coordination Committee (PCC). Although still in the preliminary stages, research/analysis/work done as part of the project will address the issue of growth, development, changing land use patterns, open space, and the possibly irrevocable effects this has on the natural (i.e. lakes, streams, woods, etc.) and cultural (i.e. farms, villages, cities, etc.) landscapes of the Finger Lakes.

The first part of the project will focus on data development and analysis. After thorough review by G/FLRPC's PCC and a municipal focus group meeting, three primary areas of data were selected for research, development and analysis. The first was existing and potential public sewer and water provision which will entail development of GIS data showing where public water and sewer systems currently exist, on the regional level. It is well documented that water and sewer infrastructure very often has a close relationship to growth and development patterns.

The second is regional open space comparisons. Municipal representatives indicated it would be helpful to develop comparisons across the region showing how much land is protected from development and what form that protection takes. This is tentatively termed the "spectrum of protection" and runs from relatively loose protections such as land in agricultural districts all the way through to State Park land.

The third area of data concerns village/small city centers – re-purposing. The vitality of the villages and small cities of the Finger Lakes are important from a tourism, and

therefore, economic development standpoint. Also, if the open space of the Finger Lakes is to be preserved, development needs to be re-focused inward towards these already developed areas, most of which have existing infrastructure. This data would seek to measure the vitality of downtowns and their contribution to the existing and potential tourist market. Downtown areas were historically centers of retailing, but this is no longer the case. This portion of the analysis will examine what uses and built forms can and should replace retailing in order to maximize the potential of downtown areas and ensure that they remain active and vibrant. A suggested measure would be to assess downtown land uses at the 25 largest villages and small cities (for example).

The second part of the project will focus on municipal outreach work. The findings of the initial research will be presented to the municipalities and technical assistance will be available to municipalities that wish to pursue planning activities. In this part of the project, G/FLRPC will not be able to directly work with all 192 municipalities in the region; therefore some procedure for selecting municipalities that are willing and committed to the process will be developed. Work will be primarily focused on helping communities help themselves. G/FLRPC will assist communities that are interested in developing and/or revising related land use plans and controls and are committed to have a good local planning process in place. The time frame of this project is approximately five years.

4.6 Empire Zones

An Empire Zone (EZ) is an area designated by Empire State Development Corporation that encourages economic development, business investment and job creation through a variety of incentives. It also promotes a coordinated effort between state and local economic developers to stimulate job creation in distressed areas. The Genesee-Finger Lakes Region currently has Empire Zones in Genesee, Livingston, Monroe, Orleans, Seneca and Wayne Counties and the Cities of Geneva and Rochester. New zone designations should be made in Wyoming and Yates Counties.

4.7 Build Now New York Sites

“Build Now-NY”, an initiative of the New York State Office of Regulatory Reform, is a program that awards matching grants for environmental review, zoning changes and other site preparation and approvals necessary for development. This program also creates an inventory of locations for a wide range of business profiles and promotes the locations as ready for development. The program is modeled after the successful SEMI-NY program and the desired outcome is to make New York State more desirable during the site selection process.

There are three phases in the “Build Now-NY” program. Phase I and Phase II sites exist in the G-FL region. Phase III sites have not been awarded anywhere in the state. Phase I includes sites available for the following uses: Research & Development, Manufacturing,

Light Industrial, Office Park, Warehouse Distribution, Business/Commercial Park and Retail. Phase I sites within this District are listed in Table 21.

| Table 21 - Genesee-Finger Lakes Region Qualified Phase I Build-Now NY Sites | | |
|--|------------------------------|---------------------------------------|
| Site Name | Location | Site Type |
| Silver Hill Technology Park | Newark, Wayne County | Business/Commercial Park |
| Blackwood Business Center | Farmington, Ontario County | Warehouse Distribution |
| Dansville Industrial Park | Dansville, Livingston County | Light Industrial |
| Crossroads Commerce Park | Avon, Livingston County | Warehouse Distribution (Shovel Ready) |

Source: Governor's Office of Regulatory Reform, 2005

Phase II includes sites available for the following uses: High Technology Manufacturing, Distribution/Logistics/E-Commerce Fulfillment and Multi-Tenant Business & Technology Park. Phase II sites within this District are listed in Table 22.

| Table 22 - Genesee-Finger Lakes Region Qualified Phase II Build-Now NY Sites | | |
|---|----------------------------|---|
| Site Name | Location | Site Type |
| Apple Tree Acres Park Corporation | Bergen, Genesee County | Multi-Tenant Business & Technology Park |
| Crossroads Commerce Park | Avon, Livingston County | Distribution/Logistics/E-Commerce Fulfillment |
| Perry Commerce Center | Perry, Wyoming County | Multi-Tenant Business & Technology Park |
| Rochester Technology Park | Rochester, Monroe County | Multi-Tenant Business & Technology Park |
| Valley at Geneseo | Geneseo, Livingston County | Multi-Tenant Business & Technology Park |

Source: Governor's Office of Regulatory Reform, 2005

4.8 Infrastructure

For the purpose of this document, infrastructure is defined as the facilities and services needed to sustain a community including residential, industrial, commercial and other land uses. The following sections highlight transportation, telecommunication, water and wastewater.

4.8.a Transportation Activities

The transportation network in the region supports the movement of goods and people and, ultimately, influences the condition of the regional economy. The physical infrastructure consists of approximately 12,000 centerline miles of interstate, arterial and collector roadways, 650 miles of active railroad lines, over 200 miles of multi-use trails, and several intercity transportation facilities. Public transportation services are available

in all but Yates County; a study is being undertaken to determine the feasibility of providing service there.

The regional organization charged with the responsibility of studying and enhancing the movement of goods and people into, out of, and throughout the region is the Genesee Transportation Council (GTC), the designated Metropolitan Planning Organization (MPO) for the nine-county region. GTC has been designated by the Governor of New York State as the MPO responsible for transportation planning in the Genesee-Finger Lakes Region.

The mission of GTC is to maximize the contribution of the transportation network to the social and economic vitality of the Genesee-Finger Lakes Region. Specific goals related to economic development are to support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity and efficiency. The transportation system should support balanced community and economic development and be a distinguishing competitive feature which serves the needs of existing businesses and enhances the region's attractiveness to new business. The transportation network should also increase the accessibility and mobility options available to people and freight.

GTC must, at a minimum, produce and maintain three major documents to be in compliance with the transportation planning process required by the federal government. These documents address both the long and short term transportation challenges facing the region and proposed actions to address these items.

4.8.a.i The Long Range Transportation Plan

The Long Range Transportation Plan (LRTP) provides a 20-year analysis of existing and projected transportation system capabilities, issues, and opportunities, as well as alternatives to address these issues and maximize opportunities. This assessment is performed in the context of the eight major transportation planning focus areas established by the federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), enacted in 2005. It provides the framework for guiding the planning and implementation of transportation improvements in the region. The Long Range Transportation Plan must be updated every three years and was updated last in December 2004.

4.8.a.ii The Unified Planning Work Program

The Unified Planning Work Program (UPWP) establishes the program of federally-funded transportation planning activities using the objectives and strategies identified in the LRTP. These planning projects must be consistent with and advance the overall objectives and strategies identified in the LRTP. The UPWP is updated annually.

Planning projects completed or currently underway which reflect the intersection of transportation and economic development in the region are Center City Way-Finding

Sign Update, Regional Tourism Signage Study, Route 14 Truck Study, Goods Movement Planning, Optimizing Transportation Through Efficient Use of Infrastructure, Area Wide Job Access and Reverse Commute Plan and several corridor studies.

4.8.a.iii Regional Goods Movements Strategy

The Regional Goods Movements Strategy is a component of the UPWP. The objective of the project is to develop a strategy to further strengthen the regional transportation network as a competitive advantage of the region in recruiting and retaining firms, with special attention paid to traditional and emerging-technology manufacturing firms and the vibrant agricultural industry.

There are four elements to the project. The first is an analysis of the goods movements needs of the current and projected regional economy. Another element is the identification of regional trade corridors for different modes of transport in relation to current and projected levels of capacity. The goods movements needs assessment will be combined with the identification of regional trade corridors to develop strategies to improve goods movement in the region. Finally, all subsequent activities to the analyses will be prioritized to ensure that implementation occurs.

4.8.a.iv The Transportation Improvement Program (TIP)

The Transportation Improvement Program (TIP) identifies the timing and funding of all transportation improvements involving federal funds over the next five years for the region. These projects typically emerge from the UPWP planning process and must be consistent with the overall objectives and strategies identified in the LRTP. The TIP is updated every two years. The TIP is a dynamic document – amendments and modifications occur when new projects are identified through federal discretionary programs. The current TIP was adopted in 2005 with an update scheduled for 2007.

4.8.b Telecommunications

Telecommunication systems electronically transmit messages and data from one point to another. The benefit of this form of communication is that it is effective and efficient. Telecommunications infrastructure identification, connection and development is critical to support current and future economic development in the region.

Various degrees of information were gathered throughout the region with regards to existing and future telecommunications needs. Several counties have created, or are currently creating, databases of their respective telecommunications network. Some have also advanced that inventory by including continued identification and improvement of their networks into the priorities listed in Chapter 5. Genesee, Ontario, Seneca and Wyoming Counties have completed telecommunications studies. The region has identified telecommunications as crucial to economic development and strategies to bolster it in the region are further described in Section 5.1 of this document.

4.8.c Water

Residents in the Genesee-Finger Lakes Region are fortunate to have access to clean and plentiful water supplies, as well as excellent treatment and conveyance systems to deliver those supplies efficiently to homes and businesses. The largest single water treatment supplier in the region is the Monroe County Water Authority (MCWA) based in Rochester. The MCWA serves approximately 500,000 customers in Monroe, Genesee, Ontario, Livingston, Orleans and Wayne Counties and has a storage capacity in excess of 130 million gallons. With an average daily consumption of approximately 60 million gallons, there is enough water stored within the MCWA conveyance system to meet demand for up to three days in the event of a system failure.

Outside of Monroe County, water is provided by the MCWA on a retail basis to ten towns and villages in Genesee and Livingston Counties and on a wholesale basis to fifteen towns and village in Genesee, Ontario, Orleans and Wayne Counties. The majority of water used by the MCWA comes from Lake Ontario; water used by the City of Rochester originates in Hemlock Lake, south of the city. The MCWA is currently considering expanding its water system with a new treatment facility in Webster, NY. If this project is initiated, capacity will be increased significantly and will allow for further expansion of new water districts in parts of Orleans and Wayne Counties.

Water districts that are located outside of the MCWA service area seek drinking water from a variety of ground and surface water sources, such as aquifers, lakes and rivers. While the quality and quantity of these water supplies varies and can fluctuate periodically, regional water sources are generally considered to be above national standards in quality and are reliable throughout the year. Throughout much of the region, municipalities have routinely been extending waterlines into rural areas. Projects such as these have been successfully funded through a combination of state and federal rural development grants with partial funds contributed by participating municipalities.

4.8.d Wastewater

4.8.d.i Monroe County Pure Waters Program: A Model Worthy of National Merit

Up until the mid 1970's, wastewater from the City of Rochester and surrounding communities was routinely discharged into area waterways after receiving little or no treatment. In 1964, in an effort to address area water pollution problems, the Monroe County Board of Supervisors authorized the \$550,000 *Comprehensive Sewerage Study of Monroe County*. Nearly 40 years later, many of the recommendations and solutions originally put forth through this and other related studies have been implemented, resulting in a vastly improved, integrated system for sewage and stormwater treatment and control.

The sewer system in Monroe County was separated into four sewer districts; solutions to the sewage problems included significant upgrades to the Frank E. Vanlare Treatment

Facility at Durand-Eastman Park in conjunction with gradual consolidation of other regional facilities. The most notable of these solutions, however, was the Rochester Pure Waters Combined Sewer Overflow Abatement Program (CSOAP) and tunnel system. The CSOAP project was designed as both a storage facility and conveyance vessel intended to relieve Rochester's antiquated combined sewer system, which has components dating back over 90 years. Construction of the first of three components of the system began in 1975 and the entire deep tunnel system was fully operational in 1993. While the entire project cost was over \$550 million, the project has effectively saved the city and county enormous resources by averting the street and sewer construction that would have been necessary if a traditional approach had been used. Furthermore, CSOAP has allowed for the systematic phasing out of 35 overflow sites and nearly 30 small and ineffective treatment plants throughout the county.

In 1991, the Monroe County/Rochester Pure Waters District received the "CSO Control Program Excellence Award" from the United States Environmental Protection Agency. Since 1993 the system has captured approximately 45 billion gallons of combined sewer overflow that otherwise would have spilled directly into local waterways. The majority of this wastewater receives full secondary treatment when federal laws currently only mandate primary treatment (removal of solids only).³ Municipal treatment facilities are routinely evaluated as to their effectiveness and consolidated into the Pure Waters system as resources allow, drastically reducing the costs of sewage system operation.

4.8.d.ii Outside of Monroe County

The majority of communities with high population densities in the G-FL Region are serviced by local sewage treatment facilities. This is of vital importance considering that most communities in the region obtain their drinking water from the same bodies of water that receive treated effluent from such facilities. Furthermore, the viability of recreational activities and the health of human and wildlife populations are dependent upon clean sources of water.

According to the New York State Department of Environmental Conservation, there are 37 secondary and 27 tertiary treatment facilities operating in the G-FL region. Both industrial and residential wastewater can be treated effectively through such systems, although tertiary systems are preferred when handling high amounts of industrial and/or urban wastewater. The capacity of these facilities and the treatment processes employed within them are routinely assessed by state and local officials in order to ensure that the systems in place are adequate to meet the demands of the households and businesses being serviced by them. In some instances, older treatment facilities are being brought off-line in an attempt to increase service and cost efficiency through facility consolidation. In other instances, new facilities are being constructed in order to meet the

³ Northeast Midwest Institute. Rochester New York Pure Waters District Combined Sewer Overflow Abatement Program. Last viewed online 3/10/06 at <http://www.nemw.org/glci/RPWDCSCSOAP~1.pdf>.

demands of growing populations, to supplement or replace aging facilities or to provide service to communities plagued by failing on-site septic systems.

4.8.e Energy

A significant number of counties and municipalities in the Genesee-Finger Lakes Region have, or are considering wind tower siting for large and small wind energy projects. G/FLRPC will continue to work with the New York State Energy Research & Development Authority (NYSERDA) to provide assistance to G/FLRPC member counties and municipalities in the areas of Community Education and Outreach and Community Technical Assistance.

Community Education and Outreach focuses on education and outreach related to the process of siting wind energy systems within local jurisdictions including workshops, presentations and meetings. Community Technical Assistance focuses direct assistance to communities identified as having interest in siting wind energy systems and can include site plan and land use regulation and control, decommissioning and financial incentive program assistance.

4.9 Water Protection and Restoration

The maintenance of clean, safe, and accessible water resources is an important aspect of regional economic development. In order to ensure that various water uses do not come into conflict with each other, active resource planning and management is necessary. G/FLRPC, in conjunction with other local, state and federal agencies, has been focusing considerable attention on the protection and enhancement of regional water resources.

4.9.a Rochester Embayment Remedial Action Plan

Perhaps the most notable regional water quality initiative is the Rochester Embayment Remedial Action Plan (RAP). The RAP was initiated in 1993 to advance the Great Lakes Water Quality Agreement between the United States and Canada. The stated purpose of the agreement is to “restore and maintain the chemical, physical, and biological integrity of the waters of the Great Lakes Basin Ecosystem.” As part of the effort to fulfill this mission, the International Joint Commission identified 43 Areas of Concern within the Great Lakes Basin, including the Rochester Embayment of Lake Ontario.

Stage I of the RAP process established general water quality goals and objectives, described water quality conditions and identified pollutant sources. Stage II described completed and ongoing remedial actions to address problems, identified actions and measures necessary to restore water quality and described studies and monitoring programs needed to identify problems and track progress. As of 2006, the RAP process continues to generate invaluable scientific data regarding water quality problems in the Embayment and in upstream areas of the Genesee River Basin.

4.9.b Stormwater Phase II Regulation Implementation

G/FLRPC worked with the NYSDEC to develop the current Stormwater Phase II Regulation guidance and is now assisting with implementation. This has included continuous regional, county and local education and outreach for program overview and compliance; support to MS4 (Municipal Separate Storm Sewer Systems [urbanized areas]) and non-MS4 communities; Notice of Intent (NOI) database – geocoding and web site enabling; and analysis of NOIs and Annual Reports.

4.9.c Regional Watershed Planning

In addition to major water quality initiatives, citizens, municipalities, not for profit organizations and government agencies have been participating in grass-roots initiatives to improve and protect local water resources. At the heart of these efforts are regional watershed planning regimes—concerted, integrated planning efforts that are based on using local watershed boundaries as the appropriate and preferred scale for water planning and management. Natural boundaries like the watershed allow for the coordinated mitigation of conflicts between upstream and downstream communities and/or activities. In doing so, issues such as disagreements over waste discharge practices, water quantity problems, and various land-based activities can be addressed in a thorough and equitable manner. To date, G/FLRPC has participated in the creation of several watershed characterization reports and management plans, including those in the Conesus Lake, Cayuga Lake, Seneca Lake, Black Creek, Oatka Creek, and Oak Orchard River watersheds.

4.9.d Other Water Resource Initiatives

4.9.d.i Genesee River Action Strategy

The Genesee River Action Strategy is a concise and action-oriented document that compiles currently available information about the state of the watershed and ongoing assessment, outreach and implementation activities in a State of the Basin report and proposes environmental and natural resource priorities and measurable objectives as a strategy for achieving those goals. The process brings together all appropriate agencies and stakeholders to focus support in the form of grant dollars, technical assistance and other resources to address priority water quality and natural resource needs.

4.9.d.ii Joint Flood Mitigation Plan

The communities along the Tonawanda and Oatka Creek in Genesee and Wyoming Counties have experienced several floods in the past, resulting in severe damage to property, as well as risks to the health and safety of residents and others. G/FLRPC was asked to prepare 26 Flood Mitigation Plans for the 24 participating municipalities and two counties in the project area.

The goals of the project were to develop a watershed-wide and municipal approach for mitigating and reducing flood hazards along the Oatka and Tonawanda Creek in Genesee and Wyoming Counties and to adopt plans for participating communities that identify the most effective means of implementing measures to eliminate or reduce the impacts of flood hazards. A flood hazard and risk assessment was completed for each community in 2003. General hazards, in the communities along the Tonawanda and Oatka Creeks in Genesee and Wyoming Counties, include structural damage, floodplain development and impervious surfaces, in-stream debris, stream-bank erosion and associated siltation, culvert maintenance and sizing, and issues associated with existing dams.

4.9.d.iii Local Laws to Protect Finger Lakes Water Quality

Within the greater Finger Lakes Region, watershed protection plans have been completed for Canandaigua, Cayuga, and Conesus Lakes. The watershed protection plans identify priority actions needed to protect and improve water quality, including capital projects and local development controls. Building on these watershed protection plans, G/FLRPC is developing specific water quality control laws and/or ordinances for local governments within the Canandaigua, Cayuga, and Conesus Lake watersheds.

The project involves the following components. The first is the assessment of existing local laws, ordinances, and practices that relate to water resources in all 56 municipalities in the three watersheds. Another is the development of specific water quality control laws and/or revisions to existing regulations for the 13 selected local municipalities within the three watersheds. Preparation of a manual of model local laws and case studies to reduce water pollution from non-point sources as a resource for local governments is the third component. The last component is a series of workshops throughout the State's Great Lakes watersheds to stress the importance of local development controls as a means for addressing non-point sources of pollution, as well as to provide information and examples of local laws and controls appropriate to a variety of local circumstances.

4.9.d.iv Oatka Creek Watershed Steward

G/FLRPC staff have been assisting the Oatka Creek Watershed Committee (OCWC) to foster the process of moving from a State of the Basin Report to a watershed management plan over the past two years. Work has included development of and presenting two series of public meetings, assisting in the development of the Oatka Guide, developing an Intermunicipal Agreement and developing and presenting to all municipal boards in the Oatka Creek Watershed.

4.9.d.v Controlling Sediment in the Black and Oatka Creek Watersheds

Sponsored by the Great Lakes Commission Program for Soil Erosion and Sediment Control, this project has accomplished the following goals across the 28 municipalities within the Black and Oatka Creek watersheds:

- Municipal education and outreach regarding erosion and sediment control;

- Identification and analysis of significant erosion areas within the riparian corridor with the development of analysis of the riparian corridor in the Black Oatka Creek watersheds;
- Assessment and analysis of federal and state laws and regulations and municipal local laws with regard to erosion and sediment control with the development of municipal law review and analysis;
- All water quality/resource issues identification and prioritization; and
- Assistance to municipalities in revising local laws with regard to stormwater, erosion and sediment control.

4.10 Regional Marketing

4.10.a Greater Rochester Enterprise

Greater Rochester Enterprise (GRE) is a regional economic development organization supported by a team of private and public sector leaders dedicated to improving economic performance in the Rochester-Finger Lakes Region. GRE's primary goals are to retain and expand existing business and to professionally market this region as a competitive, vibrant and high-profile place for business location and growth. To support business attraction, expansion, entrepreneurship and innovation, GRE collaborates with local businesses, universities, not-for-profit organizations and government leaders to deliver a unified response to regional economic development opportunities.

GRE's client-driven project management services include:

- Providing detailed demographic, statistical, comparative and industry specific information about the region
- Researching and identifying potential commercial sites and buildings
- Identifying available grants, incentives and financing
- Facilitating meetings with appropriate city, county and state agencies
- Coordinating meetings with appropriate service providers such as legal, accounting, banking, etc.
- Assisting with workforce and recruitment training needs
- Providing detailed information about living in Greater Rochester, including housing, schools and cultural amenities

In 2004, GRE, the City of Rochester and Monroe County created a partnership where GRE was designated as the single point of contact for economic development clients. The partnership has assigned GRE with the responsibility for marketing, sales and client management. The City and Counties have retained administrative and approval functions for economic incentives and programs, but work in conjunction with GRE in the offering of incentives and programs in a coordinated team approach. Wayne County has recently established a similar relationship with GRE.

For more information on the Greater Rochester Enterprise (GRE) visit their website at www.RochesterBiz.com

4.11 Industry Clusters

Industry Clusters are geographic concentrations of interconnected companies and institutions in a particular field which, when grouped together, form a critical mass. By doing this, the region in which the industry cluster is located attracts new companies, job candidates, and purchasers for their products and services. The compound effect of clusters makes the local industry more competitive and benefits the regional economy. There is much debate in the G-FL Region about what clusters exist. There has been some consensus that the region should focus its efforts on the Optics & Imaging, Biotech & Life Sciences, Food & Agriculture and Alternative Energy clusters.

4.11. a Center for Integrated Manufacturing Studies (CIMS)

The Center for Integrated Manufacturing Studies (CIMS) at Rochester Institute of Technology (RIT) was established to increase the competitiveness of manufacturers through applied technology and training. CIMS is a dynamic collaboration of in-house technical experts and academic, industry and government resources.

4.11.a.i Relevant Work through 2005

Launched by CIMS in 2003 the *Roadmap for the Revitalization of Upstate New York Manufacturing* is a multi-year effort to analyze and understand the competitive issues facing manufacturers in Upstate New York, and work with those companies, their cluster leadership and regional stakeholders to develop actions to address those issues.

With initial funding from the New York State Office of Science, Technology and Academic Research (NYSTAR) the *Roadmap for the Revitalization of Upstate New York Manufacturing* studied 583 companies in the Industrial Machinery & Systems (IMS) and Materials Processing (MP) clusters of the Genesee-Finger Lakes Region. Data was gathered using surveys, onsite assessments and focus groups. An ongoing relationship was built with the principle collaborative organization for these clusters, the Rochester Tooling & Machining Association (RTMA).

Subsequent funding in 2004 from the U.S. Department of Commerce, Economic Development Administration (EDA) supported similar analysis of the Food Processing (Food) and Optics, Imaging & Electronics (Optics) clusters which contain approximately 175 companies in the Genesee-Finger Lakes Region. This grant allowed the *Roadmap for the Revitalization of Upstate New York Manufacturing* to study the Food, IMS, MP and Optics clusters in 19 other Upstate New York counties, covering over 1,100 companies. Meaningful work was done in collaboration with the Rochester Regional Photonics Cluster (RRPC) the main collaborative organization representing regional Optics companies.

From this extensive fieldwork, study of primary public data sources, and review of relevant published reports, the following six principle competitive issues were identified as most fundamental to the revitalization of manufacturing in the Genesee-Finger Lakes region and all of Upstate New York:

- Innovation
- Market expansion
- Management practices
- Skilled labor supply
- New York State business costs
- Collaboration

4.11.a.ii Major Insights

Roadmap for the Revitalization of Upstate New York Manufacturing analysis of these principal competitive issues and the root causes of the challenges they pose to Upstate New York manufacturers yielded the following important insights into the structure and condition of the regional manufacturing economy.

- Manufacturing heavily depends on smaller companies (below 500 employees)
- The decline of large Original Equipment Manufacturers (OEMs) is creating significant gaps in the regional manufacturing economy
- Vital competitive knowledge, including competitive intelligence, technical know-how and best practices, is lacking among smaller companies, despite the presence of significant knowledge generating resources regionally
- Resources, both private and public, are scarce and fragmented
- Collaboration is limited

4.11.a.iii Planned Work for 2006

These principle issues and important insights are being further examined in Spring 2006 through two roundtable discussions composed of regional academic, business and government leaders and national policy experts. The goal is to quickly move to feasible and meaningful recommendations for action. A conference to present the *Roadmap for the Revitalization of Upstate New York Manufacturing* major findings and recommend actions is planned for Summer 2006.

The *Roadmap for the Revitalization of Upstate New York Manufacturing* will conclude its data gathering work by studying the following seven clusters: Biomedical; Communications and Media; Fashion, Apparel and Textiles; Information Technology; Remanufacturing; Transportation Equipment; and Wood Products. This phase will examine an additional 2,400 companies across Upstate New York, of which an estimated 375 are in the Genesee-Finger Lakes Region.

4.11.a.iv Future Implementation Activities

Critical among the company-level root causes of the competitive challenges facing regional manufacturers are **limited competitive knowledge** and **insufficient innovation**.

CIMS is pursuing several *Roadmap for the Revitalization of Upstate New York Manufacturing* implementation pilot projects designed to address these two root causes. The *Knowledge Clearinghouse* will provide companies and clusters with competitive knowledge critical to their competitiveness and long-term viability in the region. The *Innovation Test Bed* will be an important resource to identify and facilitate development of needed manufacturing-related innovations, and help companies implement them. *Cluster Collaboration Support*, working with organizations such as industry or trade associations on effective cluster strategic planning will focus their member's limited resources on actions that will make them collectively more successful. CIMS is specifically planning cluster collaborative support projects for the Optics & Imaging and Alternative Energy clusters. *Technical Assistance* to individual qualifying businesses, if necessary, would enhance their competitiveness through the application of applied technology and training. A variety of resources and services are available to help identify needs, barriers, and develop solutions to address them. **The *Knowledge Clearinghouse*, *Innovation Testbed* and *Cluster Coordination* efforts are CIMS projects of the U.S. Department of Labor Workforce Innovation in Regional Economic Development (WIRED) grant awarded to the Finger Lakes Partnership in February 2006.**

4.8.a.iv.a The Knowledge Clearinghouse

As noted above competitive knowledge is a key driver of manufacturing competitiveness. However, the smaller companies that dominate the regional manufacturing economy often lack sufficient resources to acquire and apply all the knowledge necessary for them to compete effectively over time.

The Knowledge Clearinghouse will work to improve the competitiveness of regional manufacturers and their clusters through activities such as:

- Emerging market research based on comparison of current markets served, products offered and technologies used with global trends in these factors
- Technology forecasting by assessing competitive technologies in the region and analyzing global technology trends
- Educating companies on specific competitive technologies, know-how and implementation strategies
- Best practices identification, global benchmarking and promotion
- Regional resource inventory, analysis and strategy development

**CIMS Project: Upstate Tooling and Machining Association
(UTMA) Regional Marketing Strategy**

The Upstate Tooling and Machining Association (UTMA) is a collaborative organization representing over 100 precision metalworking companies from Buffalo to Syracuse. In 2004 the UTMA engaged CIMS to provide research and expert opinions on the development of a regional marketing strategy to help its members penetrate markets beyond a 1,000 mile radius of Rochester.

UTMA member capabilities and capacities were benchmarked using surveys, onsite assessments and analysis of U.S. Census Bureau data. Target markets with favorable growth and competitive dynamics were evaluated, prospective large customers within those markets were recommended, and their purchasing practices and personnel were identified. CIMS is working with UTMA executive and member leadership as they develop an implementation strategy to approach these target markets and prospective customers. This engagement has been extended through August 2006.

4.8.a.iv.b The Innovation Test Bed

All manufacturers can benefit from manufacturing-related innovations that will cut costs and yield better products. However, smaller companies often lack the resources, expertise and infrastructure to identify and successfully implement such innovations. This jeopardizes their individual long-term viability and the collective future of manufacturing in the region.

The Innovation Test Bed will help improve the manufacturing-related innovation activities of these vital smaller manufacturers through activities such as:

- Strategy development to focus resources on high priority innovation opportunities
- Value-engineering research projects focused on production life cycle analysis.
- Implementation support to optimize benefits, moderate costs and mitigate the risks of introducing manufacturing-related innovations
- Provide assistance and support to companies pursuing innovation through advanced technologies
- Provide facilities, equipment and laboratory support for validation, testing and feasibility studies in support of innovative concepts

**CIMS Project: Davenport Machine, Inc.
Model B Servo Drive Design**

Davenport Machine, Inc. (Davenport) is a Rochester-based company founded in 1894. The Davenport Model B Automatic Screw Machine efficiently produces high precision small components, and is broadly used worldwide. Originally patented in 1902, the Model B received numerous technical upgrades to remain competitive, but by the early 1990s was being overtaken by new technologies and products.

Davenport chose to fundamentally improve the Model B by integrating a programmable servo motor to control its tooling. Collaborating with CIMS and RIT staff at the CIMS facility, Davenport created an innovative design that was available as an option on new machines, could be installed by customers on existing machines, or could be integrated into machines remanufactured by Davenport. This new design was built and proven at CIMS. Today the updated Servo Model B is the primary product sold by Davenport.

4.8.a.iv.c Cluster Collaboration Support

Cluster collaborative organizations such as industry or trade associations are an effective mechanism to aggregate the resources of smaller companies to address such challenges. Through sound **cluster strategic planning** such organizations can focus their member's limited resources on actions that will make them collectively more successful. These actions include **commercial activity** and **change management**. Such associations tend to be funded almost entirely with member company dues, limiting their ability to employ specialized resources and adequately sustain work on the challenges confronting them. They need ongoing expert support to be more effective.

Applying the skills and relationships it has developed conducting the *Roadmap for the Revitalization of Upstate New York Manufacturing*, CIMS plans to work with cluster collaborative organizations to **facilitate** cluster strategic planning, **support** commercial activity and **enable** change management. Since these activities would be through cluster-level organizations all their member companies would benefit, yielding a high return rate on the investment supporting this proposal.

4.8.a.iv.d Technical Assistance

The provision of direct technical assistance to individual qualifying businesses, if necessary, to enhance their competitiveness through the application of applied technology and training is a crucial element of the overall *Roadmap for the Revitalization of Upstate New York Manufacturing Strategy*. A variety of resources and services are available to help identify needs, barriers, and developing solutions to address them. CIMS would market and coordinate the delivery of services to qualifying businesses. CIMS would make available its full range of resources, which include in-house expertise, as well as academic, industry and government resources. A sampling of services includes the following:

- Benchmarking
- Design for Assembly/Manufacturing

- Ergonomic and Safety Analysis
- Facilities Assessment/Plant Layout
- Finite Element Analysis
- Lean Manufacturing/Process Improvement
- Materials Analysis
- Pollution Prevention and Clean Technology Implementation
- Product Design, Redesign and Prototyping
- Quality Systems Development
- Reliability Studies
- Workforce Training

These services are typically delivered to smaller manufacturers using a three phase approach: on-site needs identification and facility tour; proposal development, analysis and assessment report; implementation of recommendations.

For more information on the Center for Integrated Manufacturing Studies (CIMS) visit www.cims.rit.edu

4.11.b Greater Rochester Smart Energy Initiative (SEI)

The Greater Rochester Region is working to become a known leader in alternative energy industries. Already, our region is rich in research and development assets in fuel cells, solar technologies, wind turbines, and biofuels. The region is now ready to accelerate efforts to leverage our existing assets and rapidly grow these industry sectors. To do this, many collaborative projects are in the works, in the areas of research and development, manufacturing development, and demonstration.

Examples of proposed activities include:

- Creation of a Hydrogen Village
 - Large-scale demonstration project located in downtown Rochester, NY at the site of the High Falls waterfall. Hydropower from the falls would be utilized to generate hydrogen from electrolysis and used to power a myriad of applications including local buildings, city vehicles, busses, etc.
- Materials Research Center
 - Creation of a collaborative materials research center focused on alternative energy applications. By leveraging existing materials expertise at companies such as General Motors, Delphi, Kodak, Bausch & Lomb, ExxonMobil, and universities such as Rochester Institute of Technology, University of Rochester, Cornell, and Alfred University, new breakthroughs in fuel cell membranes, thin film solar

technologies and others will be achieved. This will spawn significant commercial activity and economic growth in the region.

- Hydrogen Fueling Stations
 - Creation of hydrogen fueling stations located strategically throughout the region to power fuel cell and hydrogen internal combustion engine vehicles.
- E85 Ethanol Fueling Stations
 - Establishment of ethanol fueling stations throughout the region to utilize locally produced ethanol from any of the new plants that are currently being constructed.
- Alternative Energy Commercialization Center:
 - Create a physical location for RENEW NY, which is currently a virtual business incubator for renewable energy companies located in the Western NY region. In its first two years of existence, RENEW NY has proven the need for support of renewable energy startup companies, and that significant demand exists.

4.12 New York State Canal Commission

In 2005, an interagency task force was formed by Governor Pataki to study the functions of the existing canal ways and the NYS Canal Corporation. This study yielded 12 recommendations, many of which will impact the G-FL region. Tourism is an important part of the regional economy and enhancements to the recreational attributes of the Canal system are paid great attention in the recommendations. The first recommendation is to move the Canal Corporation from under the NYS Thruway Authority to a stand-alone public benefit corporation. This signals that the canal ways are moving from the transportation realm to community revitalization and tourism.

In addition, several recommendations were made which directly impact the Erie Canal, the largest of which is the creation of the Erie Canal Greenway. The greenway will be modeled after the Hudson River Valley Greenway and the Niagara River Greenway. There have been revitalization efforts along the Erie Canal but this Greenway initiative calls for a more coordinated effort. The Erie Canal Greenway will be a waterway trail for non-motorized boating and a multi-use trail.

The plan is that the Erie Canal Greenway will eventually connect to the Hudson River Valley Greenway and the Niagara River Greenway to form a statewide greenway, the Empire State Greenway. The combination of the three greenways will yield the longest multi-use trail in the United States and will be an eco-tourism destination. This will be realized through partnerships at the federal, state, and local level and with enhanced marketing of the canal.

4.13 Finger Lakes Beverage Consortium

The Finger Lakes region of Upstate New York is the geographic center of diverse beverage production within the state. Known primarily for its wine, the region hosts value-added production in other fermented beverages (beer, fruit wines, mead), distilled beverages (fruit port), as well as a wide range of fruit juices. Some sectors of the region's fruit enterprise have suffered due to expanding production (and overproduction) in other parts of the world. Growers and processors are looking for new and unique uses for their products. This process can be greatly enhanced with targeted research and outreach from Cornell University. In addition, the newly created Cornell Agriculture and Food Technology Park (The Technology Farm) provides new opportunities for potential new beverage businesses to incubate in close proximity and with considerable access to Cornell facilities and expertise.

Finger Lakes Beverage Consortium will bring great cohesion to the disparate fruit beverage businesses in the region. This will be accomplished through a variety of tasks. The first is research-based evaluation of the potential for successful new or improved beverage products. A second is the identification of unmet needs in start-up, scale-up, and pilot plant facilities to serve the beverage industry with special emphasis on a small production facility at The Technology Farm. Third is the creation of local industry alliances to help support entrepreneurial activities related to beverages. Forth is an awareness by regional agricultural- and technology-based economic development specialists about the potential and resources available to emerging beverage enterprises. Fifth are university-based research and development collaborations among regional higher educational institutions that foster support the beverage industry (market studies, health and nutrition studies, new product development, etc.). The last task will be the identification of the resource base within the region to support the expansion of the beverage industry, including: strategic, business, and market planning; product development assistance; and marketing and transportation. The EDA University Center at Cornell will be used to seed the overall tasks of this project.

Chapter 5 - Development Actions, Efforts & Priorities

The following section itemizes the actions, efforts and priorities of the Economic Development/Industrial Development Agencies and Planning Departments in the District. The work program, which is in the latter part of this document, provides an active plan to support, assist and supplement these efforts to further economic development in the District. A listing of priority projects for the remainder of 2006 and the upcoming year are presented in chart format along with associated sources and amounts of funding and expected start and finish dates.

5.1 Genesee-Finger Lakes Region

The proper telecommunications infrastructure is crucial for the Region to aggressively compete in the rapidly changing global economy. In the “new” economy where technology and communication are keys to success, effective and efficient communication systems are what can poise a region for success. A connected region is necessary to facilitate long-term economic development.

The G-FL region has the opportunity to develop an advanced telecommunications infrastructure. One of the major impediments to the region is that the telecommunications system is splintered and the level of information about and sophistication of the system varies between counties. A fractured county-specific approach to telecommunications infrastructure adds limited value but there are great benefits gained through a region-wide effort.

One issue affecting the region with regard to telecommunications is the lack of knowledge that exists about telecommunications infrastructure and the absence of a regional development plan. Currently, Genesee, Monroe, Ontario, Seneca and Wyoming Counties have completed telecommunications studies. In order to work towards a regional development plan, a region-wide inventory and assessment of current telecommunications infrastructure must be completed in all nine counties. A telecommunication studies must be performed for Livingston, Orleans, Wayne and Yates Counties. The addition of information on these four counties would provide the region with the necessary knowledge to identify and prioritize improvements to the network.

In order to ensure that the region’s telecommunication network is operating at its optimum capacity, EDA and other funding for a regional telecommunication inventory, assessment and strategy would be beneficial. This approach will allow for an evaluation of current and future actions needed on a county and region wide scale. By completing a regional study, the District will have an advantage as it competes locally, within the state, nationally and internationally for job creation, attraction, retention and expansion. It is also important that regional academic and research institutions are connected with one another and to those outside of the region to foster the development and enhancement of innovation and products.

One of the most significant things that occurred in the region recently is the awarding of \$15 million to the region through the USDOL WIRED Initiative. At the end of the three year grant, processes and programs should be in place to transform the regional economy. The WIRED Economic Development Implementation Team believes that a telecommunications infrastructure inventory and assessment and regional development plan would allow the region to leverage WIRED funding, make it more successful and contribute to the program's sustainability.

A telecommunications infrastructure study aligns with many of the elements of the WIRED Initiative, including cluster development, innovation test beds and the knowledge clearinghouse. The four clusters identified in WIRED, Optics & Imaging, Biotech & Life Sciences, Food & Agriculture, and Alternative Energy, are essential to the growth of the region. Each of the clusters has identified the lack of necessary telecommunications infrastructure as an impediment to their growth. An investment by the EDA and the region will help to leverage the WIRED funding and strengthen the regional economy. The WIRED Team heavily endorses the development of a regional telecommunications infrastructure plan.

Another project that the WIRED Operations Team strongly endorses is the development of a regional economic development analysis and benchmarking study. This study would include in-depth data development, collection and analysis on all facets of economic development ranging from regional organizational capacity to advanced econometrics measures. This would produce the most thorough analysis of the region to date as it would incorporate primary data collection through survey, focus groups, personal interviews and advanced statistical techniques to study socio-economic and demographic information. In addition, benchmarking of the region against its peers will be done and those measures will be available for use in the future.

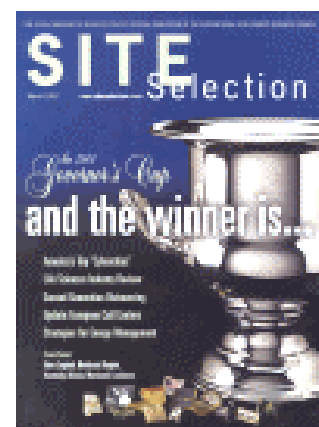
An empirically based strategy that incorporates such a high level of sophistication about the regional economy has not been conducted in the region and, therefore, a vision and strategy for the entire region has not been produced from such high level data. Other regions throughout the nation have found similar studies to be enormously helpful. Central New York recently completed a similar process with their Essential New York Initiative and the Greater Philadelphia Global Partners produced the Global Plan for Greater Philadelphia Phase I: Globalizing Greater Philadelphia: Assessment and Recommendations. The G-FL regional economy needs an advanced analysis to in proceed forward in the current global and knowledge-based economy.

| Table 23 - Genesee-Finger Lakes Region Priorities | | | | |
|--|---|-----------------------------|-----------|---------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
| GFL-1 | Telecommunications Infrastructure Regional Development Plan | Federal, State, Local | \$250,000 | 2006-2007 |
| GFL-2 | Regional Economic Development Analysis and Benchmarking Study | Federal, State, Local, etc. | \$250,000 | 2006-2008 |

5.2 Genesee County

Genesee County and by a new federal definition via the US Census Bureau designating the county as the Batavia Micropolitan area is a community which serves as the direct interconnect community between a broader regional construct which embodies both the Buffalo/Niagara and Rochester/Finger Lakes regions of Upstate New York. With a combined population exceeding 2.2M people – this broader Upstate NY region rivals the size, capabilities and capacity of the Pittsburgh MSA. Given Genesee’s centrality in this broader regional construct, promise and opportunity avail themselves as a community to own and operate businesses, as well as providing an outstanding quality of life in which to live, work and play. Well situated, within a 2 hour drive of 9 million residents as a part of the “Golden Horseshoe” region, which encompasses the Buffalo

Niagara, Rochester Finger Lakes, Syracuse and Southern Ontario Canada (Toronto) regions – Genesee County and the Batavia Micropolitan area offers several key competitive strengths as a business location including being awarded the designation as the **3rd fastest growing “Micropolitan” community in America** in terms of economic development projects as a part of Site Selection Magazine’s 2006 Annual Governor’s Cup Awards. This is the 2nd year in a row that the Batavia Micropolitan area (Genesee County) has ranked in the top 10 in the nation according to Site Selection Magazine.



Genesee County’s competitive strengths include its strategically located geography with outstanding highway and air access which includes 3 interchange exits within the county location on the NY Thruway (I-90); an ample, well educated, low cost (10% below regional cost averages) workforce; abundant and cost effective real estate including 3 shovel-ready corporate/industrial parks with supporting infrastructure along with 3 new parks currently under and at various stages of development; the world’s first business incubator with nearly 1 million square feet of low cost business space under one roof; ample Green-space for business development initiatives; a progressive and business-friendly network of community economic development partners led by the Genesee County Economic Development Center (GCEDC); an outstanding educational system

including our own Genesee Community College; a diverse array of entertainment (Six Flags Darien Lake) and attractions (Niagara Falls, professional sports teams) available regionally and locally and very affordable housing. The competitive strengths contribute to enabling a high quality of life for our residents and their families.

As a result of challenging economic times during late 2000 – 2002, which certainly impacted Genesee County's economic base including the manufacturing core, there has been a renewed sense of urgency among business, community and economic development leaders to leverage the region's and community's assets in order to stimulate economic development here in the Upstate NY region. This sense of urgency fostered the development of a 5 year economic development strategy for Genesee County. It is currently in year 4 of the implementation plan. Demonstrable progress has been made vis a' vis the 5 year strategic economic development plan. Over the last 3 years, 2003, 2004 and 2005, Genesee County has experienced record breaking economic development growth in terms of projects, capital investment and job creation commitments.

Genesee County's community economic development vision and mission focuses on enhanced capital investment which provides investment to secure jobs throughout the community. Specifically, the vision and mission can be stated as follows:

Vision: Genesee County's vision for economic development is to foster increased economic activity for our community enabling a high quality of life for our residents and their families. Economic development initiatives to market and attract capital investment both on a community-wide basis (regional geography) and by industry sector (established and emerging industries) will be embraced positioning our community as a "business-friendly growth-oriented" community offering a vibrant quality of life in which to live, work and play.

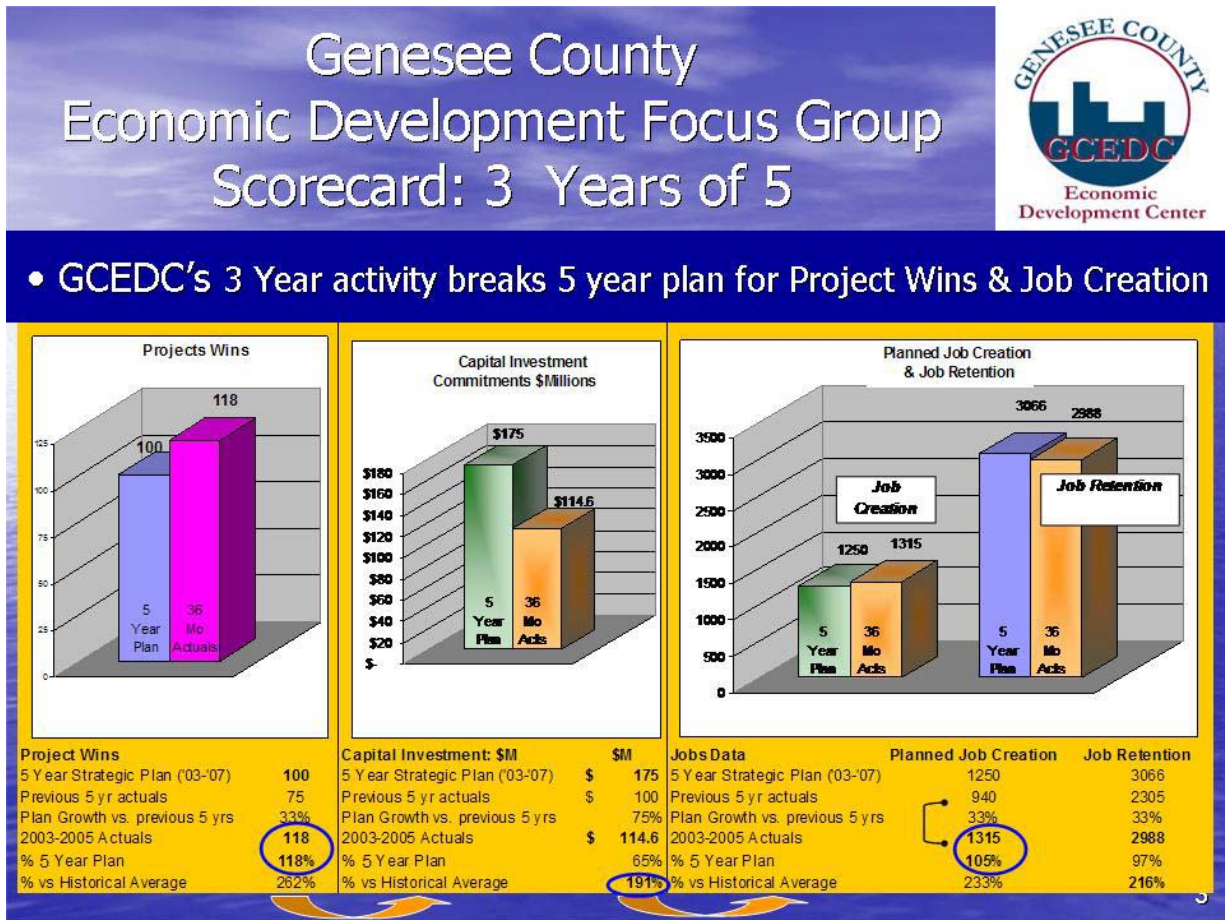
Mission: Our Community based economic development mission focuses on catalyzing community economic success through growth, expansion and retention of our existing base of businesses as well as marketing our community as a "business-friendly" climate fostering new business attraction both in terms of start-ups and established firms.

The economic development Vision and Mission is being delivered successfully by focusing on the implementation of the plan's Strategic Imperatives. During the 5 year period from 2003 through 2007, Genesee County's economic development strategy, defined through its Strategic Imperatives, will:

1. Secure \$175 million in Capital Investment throughout our community (75% growth)
2. Participate in 100 economic development projects supporting the retention and expansion of our existing business base and new business attractions (33% growth)

3. Job Creation of 1,250 jobs (33% increase)
4. Continue Active Economic Development & Marketing Programs
 - Empire Zone Consulting & Implementation
 - Business Retention & Expansion programs
 - Business Attraction programs
5. Support Agricultural Industry – Enhance Capacity/Infrastructure for Agri-business
6. Support Emerging Industry Clusters – A new economic base for the community
 - Medical Technology companies including Medical Manufacturing, Pharmaceutical Manufacturing and Bio-Technology enterprises.
 - High Technology Enterprises
7. Develop 3 new corporate/industrial parks to potentially include:
 - Medical Technology Park
 - Agri-Business Park
 - Batavia Area Corporate Park (I-90): next generation Gateway Corporate Park
 - Pembroke Area Corporate Park (I-90)
8. Develop Regional Inter-Municipal Partnerships: “Opportunity Zones”
 - Leverage success of regional water deployment initiative
9. Expand Economic Development Support to small business/retail/start-ups/Incubators
10. Enhance Workforce Development Offerings to business community

The economic development scorecard focuses on successes relative to the community economic development strategy and strategic imperatives. The cumulative scorecard, which summarizes success when compared to the first three years of the plan, is illustrated below:



As one can see by the cumulative three year scorecard, significant progress has been made against the goals and strategic imperatives during the first three years of the strategic planning horizon. GCEDC's activity levels, as a proxy for overall economic development activity across the community, has exceeded the community wide 5 year strategic plan goals in terms of project wins and planned job creation in just 3 years. Overall, economic development activity is up over 200% vs. previous 5 year annual averages.

Below is a listing of several of the key economic development project initiatives enabling our Economic Development Strategic Plan and associated Strategic Imperatives:

Table 24 - Genesee County/ Batavia Micropolitan Priorities

| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
|-----------------|--|--------------------------------|---|---------------------|
| G-1 | Develop Agri-Business Park | Federal, State, Local | \$3.5 Million | 2006-2011 |
| G-2 | The Upstate Med-Tech Project: Develop a Regional Center of Excellence Certified Med & Tech Park and Commercialization Center | Federal, State, Local | Park: \$1.5-2.0M Commercialization Center: \$4-\$5 Million | 2006-2011 |
| G-3 | Develop Next Generation Batavia Area Corporate / Industrial Park @ I90 exit 48 | Federal, State, Local, Private | \$1.5-\$2.5 Million | 2004-2007 |
| G-4 | Develop Pembroke Corporate / Industrial Park @I90 exit 48A | Federal, State, Local | \$1.5 Million | 2005-2010 |
| G-5 | Re-development of the Batavia Downtown Corridor (aging industrial area) | Federal, State, Local | \$5.0-\$7.5 Million | 2005-2012 |
| G-6 | Develop Mega-Site Industrial Park supporting large scale Ec. Dev. Projects | Federal, State, Local | \$10-\$15 Million | 2006-2011 |
| G-7 | Village of Bergen Wastewater System Upgrade – enabling Apple Tree Acres Corporate Park | Federal, State, Local | \$1 Million | 2007-2011 |
| G-8 | Develop Lower Cost Electric Solution(s): Cogen, Alt Energy Address high cost of power issues for business | Federal, State, Local | \$1.5-\$3 Million | 2005-2011 |

5.3 Livingston County

Livingston County's economic development efforts continue to focus on the retention and expansion of existing firms. The County's economy is strongly influenced by the presence of Interstate 390, which bisects the County and serves as the primary transportation route for north-south travel to and from Monroe County and the City of Rochester. Subsequently, planning and development issues are more aligned with Monroe County than in the past.

New York State has designated two of the three County-owned industrial sites in Avon and Dansville as Build Now - NY “shovel ready” sites (see section 3.8b). Additionally, two privately owned sites in Geneseo and Avon have also been designated as Build Now - NY “shovel ready” sites. Business attraction efforts to these and other privately held sites throughout Livingston County are underway to reach regional and national site selectors. Through these efforts, Barilla America has recently announced their plans to construct a new 300,000 square foot manufacturing and warehousing operation in Avon.

Descriptions and photos of each site are presented on the Livingston County Development Group web site for potential tenants/buyers. www.build-here.com/sites.htm

Agriculture and related agri-business comprise a large portion of the County economy and continuing efforts are underway to strengthen these industries as changing technology continues to impact them. The dairy industry has changed dramatically over the past few years as individual, locally owned operations have been forced to expand and increase the use of technology in order to keep up with larger agri-corporations. The County is completing its Agriculture and Farmland Protection Plan which identifies the need to strengthen agricultural-based Economic Development.

The Caledonia Commodity Resource Corporation is a multi-modal feed and fertilizer transload facility that exemplifies the changing face of agribusiness throughout the County. The food processing and distribution industry is clustered in the northern portion of the county where infrastructure exists to meet its unique requirements.

Digital innovations including the expanded use of computer databases and tracking along with changing transportation requirements, environmental concerns (namely non-point source pollution) and land use considerations are producing a fundamental shift in the way agriculture and related firms do business. Capital investment from the County is and will continue to be required to keep local firms productive and competitive in the regional, state, national and international marketplaces.

The Livingston County Development Group, the marketing arm of the Economic Development Office and Industrial Development Agency, works with the County Chamber of Commerce, SUNY Geneseo Foundation and Small Business Development Center to assist small business. The County has received a HUD funded small cities grant to capitalize a local revolving loan fund. The county has been awarded a Governor’s Office for Small Cities (GOSC) grant to assist small businesses throughout the County and further downtown revitalization in the Villages of Livonia, Nunda, Mt. Morris and Dansville.

Livingston County has experienced the effects of major plant closing and downsizing during recent years. After more than 100 years of operation, Foster Wheeler Energy Corporation, which at one time was Livingston County’s largest private sector employer, discontinued the manufacture of boilers in its Dansville facility in 2003. This plant downsizing and ultimate closure has crippled the community of Dansville.

Redevelopment of the 56 acre site has been a priority. Livingston Properties has recently purchased the facility which is anticipated to house several small manufacturing operations.

The closing of Kodak's Elmgrove facility in Rochester, coupled with major cutbacks at Xerox, created a loss of approximately 4,000 jobs, many of which were held by Livingston County residents. Many Livingston County residents depend on Monroe County businesses for employment.

As a result of the greater coordination with Monroe County, a bifurcation between the northern and southern halves of Livingston County is present. While the northern half of the County has benefited from access to the Rochester market, development has been slower in the southern portion of Livingston County. Additionally, financing is being sought for a multi-tenant building within Livingston County. The Livingston County Development Group together with SUNY Geneseo and its Small Business Development Center has completed a study to determine the feasibility of an incubator facility. This establishment of this facility continues to be a top priority for Livingston County.

In January 2006, New York State awarded an Empire Zone to Livingston County. With the benefits available through the Empire Zones program, the County will be better positioned to compete for business expansion and relocation projects.

Genesee Valley BOCES offers a wide range of adult educational services from its Mt. Morris campus. Genesee Community College has opened a satellite office in the Dansville Business Park. This center, in addition to the GCC Lakeville Campus Center, are locations for continuing education and training within the County.

The Livingston Area Transportation System (LATS), the County's public transit system, is a subsidiary of the Rochester Genesee Regional Transportation Authority (RGRTA). LATS, formerly a demand response system, transitioned to a fixed-route transit system for the purpose of moving people to and from employment centers in Livingston and Monroe Counties. RGRTA also operates commuter buses transporting Livingston County residents to Monroe County for employment, medical and other services.

Another example of stronger alignment between the two counties is the purchase of water from Hemlock Lake by Livingston County from the City of Rochester's Water Bureau.

The health care industry constitutes a significant portion of the Livingston County economy and continues to grow. The rapid pace of change can be seen in the development of senior-living complexes in Geneseo and the Livingston Health Services Ambulatory Care Center. Livingston County has recently completed the construction of a new 266 bed skilled nursing facility in Mt. Morris.

As noted by the economic development and planning directors, modern health care is much more than physical facilities. Telecommunication capabilities and the ability to access data from any location are major components of the modern health care industry.

Livingston County currently has sophisticated telecommunication data distribution/access capabilities as a result of multiple projects with other County agencies and municipalities. The E-911 public safety radio system and cooperative local addressing agreement with the County Sheriff's Office has resulted in the development and expansion of telecommunications in Livingston County.

However, as with other counties, the question of connectivity is still prominent and the County is in the process of determining where telecommunications infrastructure is present, where it needs to be expanded and where it is lacking. It is expected that the scope of a study will be defined in 2006.

The Town and Village of Lima continues to be one of the fastest growing communities in Livingston County attracting several small businesses resulting in the need for sewer expansion within the town.

Livingston County priority projects are listed in Table 19.

| Table 25 - Livingston County Priorities | | | | |
|--|--|--------------------------------------|-------------|---------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
| L-1 | Small Business Incubator | EDA, State, Federal | TBD | 2006-2007 |
| L-2 | Completion of Infrastructure at Crossroads Commerce Park, Avon | EDA, DOT, County | \$1 Million | 2006 |
| L-3 | Multi-Tenant building at Crossroads Commerce Park, Avon | EDA, New York State, County, Private | \$2 million | 2006-2007 |
| L-4 | Multi-Tenant building at Dansville Industrial Park | EDA, New York State, County, Private | \$2 Million | 2006-2007 |
| L-5 | Multi-Tenant building at Mt. Morris Industrial Park | EDA, New York State, County, Private | \$2 million | 2006-2007 |
| L-6 | Lima Sewer Extension | EDA, HUD, County | TBD | 2007 |
| L-7 | Broadband Technology | TBD | TBD | 2006-2007 |

5.4 Monroe County

Monroe County's economic development team uses job creation, retention and expansion programs for existing employers as well as programs which provide attraction incentives and support services for start-ups and firms seeking relocation. A particular focus has been placed on the growth and attraction of the high technology manufacturing sector

(including optics and imaging, printing, biotechnology and plastics manufacturing) as well as business services, including Information Technology, Management Information Systems, call centers, etc.

Small business growth and expansion is recognized as the major source of new job creation and programs are available to assist these firms. Monroe County's Economic Development Department has incentive programs (GreatRate, GreatRebate, and EquiPlus) to reward small and medium sized businesses for investing in equipment and creating jobs.

The Monroe County Economic Development team's 2005 performance included 138 projects projected to add 4,000 new jobs, retaining 13,600 jobs with a total investment of \$515 million. The 138 projects approved in 2005 represent a 20% increase over 2004. Additionally, projected job creation is up 319%, job retention is up 181% and investment is up 173%.

Future industrial development is expected in the western and southern portions of Monroe County. In addition to Rochester Technology Park, the Jetview Business Park, Rochester International Commerce Center, Thruway Industrial Park and other sites offer prime industrial space throughout the area.

The addition of an Empire Zone to Monroe County in 2002 has been another tool to help with attracting greater interest from out of State companies. Empire Zones across New York State have recently undergone re-legislation. The re-legislation has encouraged the geographic clustering of future zone designations in an effort to encourage maximum benefit to specific locations and to avoid piecemeal designation. With this change, Monroe County has several companies whose benefits have been grandfathered. In addition, Monroe County has 5 pending contiguous zones that have been submitted for state approval. These locations are Rochester Tech Park in Gates, Medley Centre in Irondequoit, KPS/Kodak Park in Greece, the former Kleen Brite location in Brockport and the Lennox Tech Center in Henrietta.

In 2004, Monroe County entered into a marketing agreement with the Greater Rochester Enterprise (GRE), a public/private partnership established to professionally market the Rochester Metropolitan Area as a competitive, high-profile region for business location and growth. The concept envisions GRE being driven and supported by business, university and government leaders in Greater Rochester.

The primary focus of the GRE will be on business attraction, including professional prospect handling, marketing and related activities. GRE and its programs are being designed to create the greatest level of opportunity for the region and its jurisdictions without replicating the on-going efforts of state, regional and local partners.

Supporting Infrastructure

Monroe County's institutes of higher education have committed resources during the past several years to create institutional structures that support expanded research, technology transfer and industry support in research and development and workforce development. The University of Rochester has completed a five year, \$500 million expansion of the University's medical research arm, including the recruitment of faculty, staff and researchers. Both U of R and Rochester Institute of Technology have embarked on significant programs which address biotechnology. These investments and numerous others in the planning or development stages are key components for our region's future economic successes. In this important environment of higher education, the "Annual Leaders Summit" initiative will be launched this coming year and will be a collaborative effort that will seek to more actively engage the university community in business development opportunities throughout Monroe County.

Monroe County Executive Maggie Brooks recently announced The Entrepreneurs Network, an organization that will offer a practical, business-oriented, and hands-on educational program in which entrepreneurs will be exposed to world-renowned speakers with expertise in start-up companies. These experts will share information, including how to secure venture capital, form strategic alliances, identify market strategies and other practical information necessary to compete in today's competitive business environment. The Entrepreneurs Network will provide a structured ongoing program on a regional level serving Buffalo, Rochester, Syracuse and Ithaca. The County of Monroe Industrial Development Agency (COMIDA) will provide the seed funds for the first three years of the Entrepreneurs Network.

Road, sewer and water infrastructure are developed and updated based on established priorities and needs. A major focus of Monroe County has been the maintenance and improvement of existing infrastructure with prudent resource allocation for planning and construction of new infrastructure. Implemented through the County's Capital Improvement Program and in coordination with the City of Rochester and local towns and villages, aging public facilities such as the community hospital, library, civic center and hall of justice are rehabilitated and improved to encourage development in existing buildings.

The implementation of the Monroe County Agricultural and Farmland Protection Plan is viewed as a means to insure the continued vitality of agriculture in a predominantly metropolitan county. Factors associated with output, productivity and development of agricultural land were analyzed and recommendations developed based on these factors. The plan focuses on strengthening agriculture as an industry and tracking the conversion of farmland to other uses and related development pressures. Of note, there were modest increases in the size of Monroe County's five agricultural districts in their last delineation under NYS Agriculture and Markets laws.

In an attempt to increase the amount of out-of-area visitors and spending, tourism resources are being targeted with a number of projects currently underway. Waterfront

revitalization has become a priority with long-range plans being developed for the Erie Canal as a recreation and cultural attraction.

State funds have been secured and construction is well underway on a new soccer stadium in downtown Rochester for the Rochester Raging Rhinos. The PAETEC Park field, named for the telecommunications company based in Rochester, will be 77 x 120 yards with 15-20 feet clearance on the sides. It will feature permanent lines for soccer and temporary paint for other events.

In addition, the Renaissance Square project, which combines a central bus transfer station, performing arts hall, and new downtown campus facility for Monroe Community College is currently under design. Close to \$160 million in public funding has been secured for the project with additional funding for the project being sought from Federal, State and local sources. Active community engagement has been sought for this project, through the creation of five community advisory panels.

Monroe County's priority project is listed in Table 26

| Table 26 - Monroe County Priorities | | | | |
|--|---------------------------|--|---------------|--------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start-Finish Dates |
| M-1 | Renaissance Square | Federal, State, Monroe County, City of Rochester, etc. | \$230 million | 2006-2008 |
| M-2 | The Entrepreneurs Network | Monroe County | \$750,000 | 2006-2008 |

5.5 City of Rochester

Due to the NYS tax structure, local municipalities rely heavily on property taxes to provide services, maintain facilities and enhance amenities. Residential population loss and relocation of businesses outside of the City place a strain on City of Rochester's fiscal resources. To alleviate the pressure, the City of Rochester's economic development efforts continue to focus on revitalizing the city center as the economic hub of the Region, creating destination points and improving tourism facilities to increase spending by non-City residents and redeveloping older industrial and commercial areas. Costs of site preparation including removal of structures and renovation of obsolete buildings and associated infrastructure are a challenge to redevelopment in some areas and are exasperated by contamination issues at Brownfield sites. Despite these challenges, rehabilitation of older commercial and industrial locations is occurring throughout the City.

The Rochester Science Park is a 55 acre park which is designated for businesses that are scientific or technology related to grow and develop. Nearly 37.76 acres of the park are developable. Currently, five high-tech businesses are located within the Science Park. The City of Rochester's Economic Development Department is currently working with other organizations on potential development projects within the Science Park.

The City of Rochester Economic Development Department is developing a conceptual study for a mixed use commercial/medical facilities in the area in and around the corner intersection of Goodman Street and Interstate 490 known as Uhlen and Karges Place in the City of Rochester. This development will allow the eventual economic development of a vacant parcel currently owned by the State of New York. Located in the Southeast area of the city, the site includes vacant land at the intersection of Goodman Street and Interstate 490. Two streets identified as Uhlen and Karges place divides the project area into two parcels. The property is located in the South Avenue/Capron Street Revitalization neighborhood of the City of Rochester where South Avenue dead-ends into the I490 inner loop connector.

South Ave/Capron Street - The subject site is irregular in shape containing 110.67" fronting along the east side of South Avenue and contains approximately 28,663 sq. ft. The city is actively developing this are for mixed use development including residential, commercial, and retail components. The parcel is bounded on the south and the west by the expressway, on the north by a vacant building, and on the east by a surface parking lot. The property is generally level, located 3 ft. to 4 ft. above South Avenue and unimproved except for a concrete retaining wall topped with a chain link fence. There is access from South Avenue. The site is served with all utilities and located outside of a flood zone.

The 14621 Industrial Park is an 11 acre park which is designated for businesses that are for industrial or light industrial applications related to grow and develop. All the acres of the park are development ready and currently zoned for manufacturing and light industrial. Currently, several businesses are located within the park.

The Brooks Landing Revitalization Project is an \$18 million multi-faceted planned development project in the 19th Ward neighborhood in the city of Rochester, New York. It is located along the west bank of the Genesee River/Erie Canal at the intersection of Brooks Avenue and Genesee Street. The development components include a new 80 room extended-stay riverside hotel, a new two-story 28,000 square foot office retail building, a new 5,000 square foot riverside restaurant, a new public promenade/boat landing, a new 4,000 square foot office/retail building and the renovation of a 6,000 square foot two-story commercial building into a new cafe. Construction for the project started in 2004 and is expected to be completed in 2006.

The City of Rochester is purchasing properties along North Clinton Avenue which is a culturally diverse neighborhood. The City of Rochester will be developing La Marketa, a multi-cultural market for local residents and visitors to experience the food and culture of

the City's population base. This project will provide much needed jobs and necessary social and nutritional value to the area. The funds Rochester is seeking will be used for associated public improvements.

The re-development of a two-block area on West Main Street downtown will support a new multi-million dollar housing initiative that has recently been completed. This area will house new commercial entities that will give residents of the area, included the new housing complex, an alternative to driving elsewhere to shop. The City seeks funding for infrastructure improvements supporting the new development.

There are several high-priority projects for the City's Economic Development Department. The priority projects are the Rochester Science Park , Uhlen and Karges Place, South Ave/Capron Street, 14621 Industrial Park, Brooks Landing Project, La Marketa and West Main Street Re-Development/Public Improvements. The City of Rochester's priority projects are listed in Table 27.

| Table 27 - City of Rochester Priorities | | | | |
|--|---|------------------|------------------|---------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
| R-1 | Rochester Science Park | To Be Determined | To Be Determined | 2007 |
| R-2 | Uhlen and Karges Place | To Be Determined | To Be Determined | 2007 |
| R-3 | South Ave/Capron Street | To Be Determined | \$1.2 Million | 2008 |
| R-4 | 14621 Industrial Park | To Be Determined | To Be Determined | 2007 |
| R-5 | Brooks Landing | To Be Determined | \$18 Million | 2004-2006 |
| R-6 | La Marketa Public Improvements | To Be Determined | \$2.0 Million | 2005-2006 |
| R-7 | West Main St. Redevelopment public Improvements | To Be Determined | \$1.5 Million | 2005-2007 |

5.6 Ontario County

In 2002, the Ontario County Office of Economic Development/Industrial Development Agency (OED/IDA) began the process of updating its strategic plan, which was initially completed in 1998. In 2004, the plan was submitted to and accepted by the Board of Supervisors. The update was named a Strategic Approach and identified the following:

Well-Developed Networks for Capital, Prospects and Public Relations

- Cultivate networks of Angel Financiers, Venture Capital Funds and site location consultants making Ontario County present and prominent on their lists
- Bring high-tech businesses/entrepreneurs and venture capitalists into the local leadership
- Use public relations to create “buzz” about your area so that it is attractive to talent, prospects and Venture Capital

Talent

- Continually recruit talent as much as you recruit jobs
- Continually Improve Quality of Life (A talented workforce will be diverse--there is no such thing as an “average” high-tech worker or an “average” high-tech worker’s family.)

Sites That Are Flexible & Fully “Wired”

- Flexible sites and spaces with pre-approvals
- Aggressive infrastructure development includes
 - sewer & water
 - roads
 - telecommunications
 - airport access

Included in the Strategic Approach were Industry Targets. Those include:

- Ag-Tech/Food Technology
- Photonics/Infotonics
- Existing Mature Industries
- High-Tech Producer Services
- Select Quality of Life Niches in Retail /Hospitality / Tourism
- Aviation-Related

Strategy recommendations for Ontario County are:

- Strengthen the Technology Commercialization Path
- Workforce Development/Talent Retention & Attraction
- Retain/Expand Mature Industries
- Promote Selected Types of Retail Development
- Create Infrastructure to Support Technology-led Economic Development
- Initiate a Community Prosperity Preparedness Program

The Ontario County OED/IDA’s most recent project was the Cornell Technology Farm in the City of Geneva. The 70+ acre tech park is located adjacent to the Cornell/NYS Agricultural Experiment Station. Incubator services for startups and sites for large and small companies are available. The tech park houses biotechnology research and service

firms, as well as small food processing manufacturers. The first 20,000 square foot building is open and four tenants have been identified for occupancy. There is room for others beyond those four firms in the first building. The Cornell Technology Farm has the potential to diversify the County's manufacturing base into the food products sector and increase employment in high value added producer services which are two of the three areas of opportunity/need detailed in the 2002 strategic review update. Finger Lakes Community College (located in Ontario County) has recently added an associate's degree program in biotechnology that will train and educate local employees for careers in occupations generated by the tech park.

The Cornell Technology Farm helped advance the Strategic Approach of Ontario County and now the Ontario County OED/ IDA has a new project, "Ontario County Technology Network," which would further enhance the Strategic Approach. "Ontario County Technology Network" is a project that will connect several entities, organizations, and geographies. The project will connect people and institutions in Ontario County to each other, Ontario County to the Region and provide regional infrastructure that will better connect the region to those within it and the rest of the world.

The first component of "Ontario County Technology Network" is a Public Works project which includes a seven mile sanitary sewer line extension, landfill methane gas conveyance pipeline, multi-acre hydroponic greenhouse, centralized manure and food waste digester and a fiber optical communication cable. The sewer line extension part of this project would connect the Finger Lakes BOCES, the Ontario County Landfill Development Zone to the Cornell Technology Farm, the Hamlet of Flint, and the Towns of Seneca and Geneva. Positive outcomes of the project, in addition to increased connectivity, include job growth through the greenhouse project, lower costs of energy through the recovery of landfill bio-gases and waste heat, more efficient waste management for local companies, and bio-engineering and food process development through the hydroponic facility. The estimated cost of the Public Works component is \$9.2 million and over half of the funding has been committed by a private sector firm.

One element of the Public Works Project is the creation of a fiber optic ring. Telecommunications is such an important part of Ontario County's Strategic Approach that it is considered the second component of "Ontario County Technology Network." Ontario County recently completed a study entitled "Ontario County Open Access Network Initiative" to assess the existing telecommunications infrastructure as well as identify opportunities for further development and expansion. The study found that telecommunications in the region is segmented and that there is a need for numerous high speed networks.

The Finger Lakes Regional Fiber Infrastructure Project was developed from the findings of the study. This project would create a regional open access fiber optic ring that would consist of 173 miles and 144 strands of fiber. It would connect the following type of institutions: education, healthcare, public safety, government and research and development. This would enhance connections and the economic development

infrastructure in Ontario County and the region. There would be an opportunity for and interest has been shown in connecting to the Monroe County Municipal Network, the New York State Education Network, BOCES Regional Information Center (Wayne County), Independent Optical Network (Phelps node connects to NYC and Toronto), National LambdaRail/Internet2 (an education and high end research network), Yates County and the Seneca County Public/Private network (which would serve as a connection to Cornell University). The ring would also connect two of the more important research institutions in Ontario County, the Cornell Technology Farm and the Infotonics Technology Center.

The Ontario County Board of Supervisors recently authorized the formation of a Local Development Corporation (LDC) and had the first meeting for its board of directors. The optic ring LDC will be a stand alone corporation that is operated independent of the government. The LDC will contract with the private sector to build, operate and maintain the infrastructure. In addition, the fiber will be open to all for lease and will be a backbone fiber only with no service provision so as not to compete with the private sector. The cost of the fiber optic ring is \$7.2 million and \$2 million has already been authorized.

The last component of “Ontario County Technology Network” is the Infotonics Commercialization Center (ICC) which would be an affiliate of the Infotonics Technology Center, a New York State Center of Excellence. The Infotonics Technology Center, a 501(c)(3) corporation, is a collaborative effort with numerous universities and colleges in New York State, Corning, Eastman Kodak Company and Xerox Corporation, and the state and federal government. The purpose of the center is to attract, retain and develop talent, promote regional collaboration between industries, universities and government, boost the regional economy, and create a world-class photonics and microsystems prototype product facility.

The purpose of ICC is to aid technologists and entrepreneurs in bringing innovations to the market through helping them navigate issues related to commercialization. ICC would provide the following resources:

- Business creation capabilities;
- Business growth support mechanisms;
- Access to physical and technological assets relevant to early state companies;
- Technical support for product design;
- Access to Infotonics databases;
- Workforce training programs; and
- Resource pairing (e.g. venture capital, industry partners, etc...)

These resources would be available to both those involved with the Infotonics Center, as well as serve as a traditional incubator for other high-technology businesses.

ICC will be housed in a new building that will be located across from the Infotonics Center. The building will have office space for high-technology start-up and spin-off companies and related parties, such as venture capitalists and support staff, a state of the art communications system, shared use lab space, 250 seat auditorium and knowledge-worker attraction amenities. In addition, some of the space will be available for public use by the surrounding communities. The total project cost is \$13 million and New York State has committed \$9-\$10 million in capital funds.

“Ontario County Technology Network” will better equip both Ontario County and the Region to compete in a knowledge-based economy. Those who wish to be competitive in a knowledge-based economy must have the tools necessary to succeed. The proper infrastructure, ranging from traditional roads to venture capital, is a tool that Ontario County is looking to sharpen.

Ontario County’s priority project is listed in Table 28

| Table 28 - Ontario County Priorities | | | | |
|---|-----------------------------------|--|--------------|---------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
| ON-1 | Ontario County Technology Network | EDA, ESD, Ontario County, Private investment, etc. | \$26,400,000 | 2006-2008 |

5.7 Orleans County

The Orleans Economic Development Agency/Industrial Development Agency (OEDA/IDA) use many government agencies (including those on a federal, state, regional and local level) to assemble a wide range of incentives and benefits to assist businesses in retention and creation of jobs. Since Orleans County falls between two major population areas (Rochester & Buffalo), OEDA/IDA draw expertise and assistance from the Genesee/Finger Lakes Regional Planning Council, Greater Rochester Enterprise and the Buffalo Niagara Enterprise. This geographic location also allows the agency to recruit businesses that have a desire to locate in the Finger Lakes Area or Western New York.

OEDA/IDA has two developed business parks (Holley and Medina) and has land in Albion to develop a third. The three development properties are in the Orleans Empire Zone. Businesses that build in any of the three if qualified are eligible for Empire Zone certification and benefits

The OEDA/IDA completed the 100-acre Holley Business Park in 2004. One mile of road and underground utilities including sewer, gas and electric and were installed. The Village of Holley operates a municipal power service and inexpensive electric power at \$0.031 per kilowatt-hour delivered has been a major factor in attracting new tenants to the site. Three businesses have constructed buildings and are in operation. Funding for

the development of the business park came from a number of sources including NYS Senate and Assembly member items, Orleans County, the Village of Holley, the Town of Murray, New York State Small Cities Program and Rural Development. The completion and attraction of tenants to the 100-acre Holley Business Park is part of a larger County strategy to increase economic activity and jobs in the County.

The Medina Business Park has 120 acres of available land with 50 acres that are shovel ready. The Medina Park is eligible for Hydro Power allocation from New York Power Authority (NYPA) based on job creation. The cost of electricity ranges from \$0.02 to \$0.03 delivered based on NYPA guidelines. The Medina Park tenants are BMP America Inc. and Trek Inc. BMP America Inc. has completed a \$3 million expansion of 40,000 square feet, which will double the plants square footage and increase employment by 30 full time equivalency (FTE) to over 140 FTE.

The Olde Pickle Factory converted from the former Fisher Price factory, is a multi tenant manufacturing/warehousing facility. As a former Fisher Price Toy Factory, low cost hydropower is available from NYPA for manufacturing. On-premise ownership and management has the capability to customize leasing or outsourcing arrangements to meet specific applications.

Albion is the core of Orleans County and OEDA/IDA has strong relationships with major employers in Albion including Washington Mutual Bank and PMI Remley. As a result, Wal-Mart will open a superstore in June of 2006.

The Village and Town of Albion are developing a sewer district to service the OEDA/IDA Albion property. When completed, OEDA/IDA will start working on design of the park and then will aggressively seek funding assistance from federal, state and local governments to cover construction cost.

OEDA/IDA has funded the Orleans Revolving Loan Fund with over \$2,000,000 of Governors Office for Small Cities (GOSC) grants and loans. The GOSC grant/loan program has assisted in retaining and creating over 1,100 jobs in Orleans County. The criteria for loans include the creation or retention of jobs in Orleans County. In addition the loans offered are fixed rate below market.

The OEDA has operated a Microenterprise program since 1999. The original funding was from a HUD Small Cities grant. The agency has received two additional grants from the Governors Office of Small Cities. The Agency has run two sessions a year of a 12-week classroom training at the GCC-Albion campus through spring of 2004. In 2005, Orleans merged their classroom training with Genesee County to create a regional approach using the Batavia campus of GCC for training. Orleans has graduated over 250 residences from this training program.

The Orleans Microenterprise loan fund administered by the Orleans County Local Develop Corporation has loaned out over \$600,000 in low interest loans. The loans have

ranged from \$2,500 to \$30,000 at 75% of prime rate fixed at closing. The loan fund is restricted to Orleans County residence and must create jobs for low to moderate-income individuals.

Agriculture and related agribusiness are a major component of the Orleans County economy. Apple farming is the most notable with production of 136 million pounds annually. Orleans County apples are known throughout the industry as being some of the best in the nation. The high acidity level of Orleans' apples makes them better tasting than many others. The OEDA/ IDA is working to increase food-processing production. They have assisted four expansions (H.H. Dobbins, Atwater Foods, LLC, Magc Inc and Lake Ontario Fruit.). The Agency sees continued development and business assistance as a priority for the food processing and distribution industry

Orleans County Cornell Cooperative Extension has assisted in the formation of a Farmers' market nutrition program that will access additional participation by government agencies. The Farmers Market committee expects to open this market at the Save A Lot store on West Avenue in Albion this year. The market will be approved to accept foods stamps. Tours of farms by senior citizens groups and school children are an additional source of income and contribute to general tourism activity in Orleans County.

The Orleans County Department of Development and Planning is the officially designated Tourist Promotion Agency (TPA) and manages the County's *I Love New York Program*. The primary promotional themes include sport fishing, Agri-tourism, boating, history, nature and use of the Erie Canal. Many out-of-state travelers visit Orleans County generating \$9 million in annual expenditures at lodging facilities, bait and tackle shops and eating and drinking establishments among others. Additional signage promoting the Seaway Trail, Erie Canal and other attractions in Orleans County would likely increase activity. Orleans County has only 150 rooms for visitors and this limits the economic impact of group tours. Therefore, group tour promotion is done in cooperation with surrounding counties.

The Orleans County Planning Department, Orleans Chamber of Commerce and OEDA/IDA are working closely on the extension of Route 531 to the Orleans County border. Their long-range goal is to have Route 531 cross Orleans & Niagara Counties to I-190 in western edge of Niagara County. Businesses in all sectors in Orleans County have articulated a need for an expressway for attraction of new employees and transportation of raw and finished goods. Currently, 46% of the Orleans County workforce is commuters.

Regarding financial and business service development, Washington Mutual Bank has increased the workforce dramatically and is expected to have over 900 employees in Orleans County in 2005. The success of Washington Mutual may serve as an example for success in the service sector.

High-speed Internet infrastructure is already in place in Orleans County. Time Warner's high-speed cable service is available in all four of the villages and reaches approximately 80% of homes, businesses and institutions in the County.

Orleans County's priority project is listed in Table 29

| Table 29 - Orleans County Priorities | | | | |
|---|----------------------------------|-------------------------------|-------------|---------------------|
| Priority Number | Proposed Project (description) | Funding Sources | Total | Start- Finish Dates |
| OR-1 | Albion Business Park Development | EDA, NY State, Orleans County | \$2 million | 2005-2007 |

5.8 Seneca County

Seneca Army Depot

A focal point of the Seneca County IDA's efforts over the past 10 years has been the reuse of the former Seneca Army Depot. The Five Points Correctional Facility at the south end of the depot has created over 830 jobs (640 at the prison and an additional 190 throughout the economy). Development at the north end of the depot includes the Seneca Woods Campus and a Hillside residential-educational facility for youth in crisis, which has created 384 jobs, with the potential for additional employment. Some 180 units of military housing have been sold by the Seneca County IDA and are managed by Aspen Square Management with additional upscale housing units being developed by Aspen along Seneca Lake. New York State Police training facilities and a new Seneca County Fire Training Tower have been developed at the southwestern end with grants from the State of New York and EDA. A new 124 bed County correctional facility is now being built in an area adjacent to the PID/Warehouse area. Portions of the warehousing facilities are being leased from the IDA by PEZ Lake Development and being subleased for storage and refurbishing of restaurant equipment, and warehousing of various products. A new restaurant has opened at the Depot and Seneca County is using several buildings for offices and storage. The IDA will shortly take title to the entire area and will convey it to Seneca Depot LLC and several public entities.

Infrastructure problems and deferred maintenance by the U.S. Department of the Army is a significant problem limiting the IDA and PEZ Lake Development's ability to make economic reuse of the Depot PID/Warehouse property. Significant public investment is needed in the roads, sewer system, water system, and buildings to allow for their successful transition in support of private development activity. New York State is currently providing funding to address some of these infrastructure needs.

Continued environmental remediation needs to be done on the bulk of the Depot; namely locating and removing possible unexploded ordinance. There have been proposals to use this area for conservation and recreation, as well as other potential economic uses once the area is deemed cleared of any such ordinances. The Army is responsible for maintenance of the security fences and management of the deer herd at the base until

environmental remediation has been completed, now estimated to be the year 2012. The area contains the world's largest herd of white deer.

The IDA and its subsidiary, the Seneca County Economic Development Corporation (EDC), are in the process of updating the original Base Reuse Plan completed in 1997. The plan maintains conservation and recreational uses on the site and dedicates a portion of the facility to promotion of green energy projects. In addition, land will be devoted to the creation of a more traditional on-site electric generating facility. This facility is assumed to provide power for on-site uses such as the State prison and the county correctional facility, and institutional uses. Also included is a development reserve area intended to accommodate large-scale users. The plan will drive a targeted marketing effort, a process to solicit reuse proposals, and determinations regarding ultimate disposition of the property. This work is expected to continue over the next four years.

The IDA has just completed a study of the former 7,000 foot Seneca Army Airfield. The study findings indicate that a significant level of capital expenditures would be required to open and operate the Depot airfield as a county airport and its use as a public airport is not recommended. The study also found that a part-time or full-time security training operation by a government, military, or commercial organization would be the best potential for the facility. To this end, the IDA is already dealing with a number of interested training organizations including Fort Drum and the Navy Warfare Office.

Other Seneca County Development Activities

Seneca County has and continues to rebuild its economy after the closings and losses of jobs at the Seneca Army Depot and Willard Psychiatric Center. This rebuilding will be done by focusing on the diversification of its economy. Beyond the former Seneca Army Depot, development opportunities exist in the Towns and Villages of Waterloo and Seneca Falls, particularly along NYS Routes 5 and 20 that includes the Deer Run Corporate Park in the Village of Seneca Falls. The New York State Empire Zone program continues to offer additional development incentives. The IDA has successfully extended a sewer line to the Town of Tyre and Town of Junius including the area adjacent to Exit 41 of the NYS Thruway and NYS Routes 318 and 414. A major PETRO Travel Center has been opened opposite Exit 41. The project has created over 150 new jobs and is generating over \$1.5 million annually in new sales tax. Already the facility has expanded operations from what was originally planned. The IDA invested over \$2.3 million in this project through sewer installation and road improvements using a PILOT increment financing technique.

The IDA is working with involved municipalities to extend additional infrastructure in the Route 318/414 development corridor and to improve the connecting infrastructure to adequately serve new growth. Additionally, the IDA is working closely with the owners of Seneca Meadows Landfill on Route 414 to develop a renewable energy industrial park that will utilize low cost energy being produced by the processing of methane from the landfill. A major producer of hydroponic tomatoes has already decided to place a 30-acre green house at the park and is expected to create over 100 jobs.

The 115-store Waterloo Factory Outlet Center continues to be a large contributor to economic activity and jobs in the retail sector of the County economy. The center is facing significant challenges from other commercial development in the region including proposed projects in Syracuse, as well as Ithaca's expanding commercial base. Like factory stores around the Country, the Waterloo Factory Outlet Center is under pressure to retain a core base of identifiable retailers in order to maintain its regional draw. However, the mall has recently added three new stores and 27,000 square feet to the 200,000 square feet that previously existed. The IDA assisted the project with tax abatement and other incentives.

The IDA continues to market its 40 acre Deer Run Corporate Park in Seneca Falls and is expected to attract at least two firms to the park over the next year. A spec building is also being considered for the park.

Agriculture and Tourism

Agriculture and associated agribusiness continue to expand, primarily in the southern portion of Seneca County - occupying 65% of the land area in Seneca County. The IDA is working with a group of agri-business investors planning to site a large ethanol plant. Currently, the investors are evaluating the former Seneca Army Depot as a site for this plant. This 70 to 80 million dollar facility is expected to generate some 100 new jobs and significant demand for corn grown in the region. Spin-off development activity involving bio-technology is also expected as a result of the project.

The tourism industry is noted for the increasing number of wineries, restaurants, and bed and breakfasts located along the shores of Seneca and Cayuga Lakes. Specific historical and cultural tourism sites include those relating to the women's' rights movement and the Montezuma National Wildlife Refuge.

Seneca County is working to enhance its tourism industry. Seneca County Department of Economic Planning and Development serves as the local tourism agency marketing the area's attractions. The County is currently seeking to increase the types and quality of attractions available in the County. During the past year, the IDA assisted the developer of a new winery and banquet hall, along Seneca Lake, that is drawing a number of new visitors to the community.

Small Business

Small businesses and start-ups account for a significant portion of the growth in the County's overall economy. The Seneca County IDA and the County's Economic Development and Planning office offer several loan funds to qualified small businesses and micro-enterprises. Additionally, business development services are offered through a Micro-Enterprise Development Program designed to address the opportunities and needs of Seneca County firms. Over 60 firms were assisted in the past year.

Airport and Other Facilities

Infrastructure investment at the Finger Lakes Regional Airport (owned and operated by Seneca County) using federal, state and county funds continues. The investment will increase the use of the airport (which already accommodates corporate aircraft) by business travelers and tourists. The airport has recently been expanded to 4,200 feet and a number of other improvements are underway including new hangars and aids to navigation.

The Seneca County IDA will soon take title, from the State Department of Corrections, to some 475 acres of property along Seneca Lake that had been part of the Sampson Naval Base. About 100 acres will be set aside for a new Veterans Cemetery. The remainder will be marketed by the IDA for tax-generating uses such as upscale housing, a golf course, a resort area or other developments.

Strategic Planning

The Seneca County IDA, Seneca County government, and the Seneca County Chamber of Commerce will shortly initiate an update to the County's Economic Diversification and Development Action Strategy. Completed in 1997, this strategy has been a valuable guide that has shaped the community's economic development efforts over the past 8 years. However, it is dated and needs considerable work to ensure that the County is taking the most appropriate actions and strategies to capitalize on its economic development strengths and create new growth opportunities. The planning process will involve a team of consultants and considerable input from community leaders and the citizenry at large.

Seneca County priority projects are listed in Table 30

Table 30 - Seneca County Priorities

| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
|-----------------|---|----------------------------|---------------|---------------------|
| S-1 | Route 318 Sewer Expansion/Upgrades to Connections | EDA, New York State, local | \$4.5 Million | 2006-2008 |
| S-2 | Micro-Enterprise Program | EDA/HUD | \$400,000 | 2006-2008 |
| S-3 | Multi-Tenant Speculation Building/ Deer Run Park | EDA, local | \$1 Million | 2006 |
| S-4 | Infrastructure Improvements at the Seneca Army Depot – water, sewer, roads and drainage | EDA, New York State | \$6 Million | 2006-2011 |
| S-5 | Demolition of derelict and unneeded buildings and facilities at the Seneca Army Depot | EDA, New York State | \$4.5 Million | 2006-2008 |
| S-6 | Electrical Upgrade – Seneca Army Depot | EDA | \$2.1 Million | 2006-2007 |
| S-7 | Seneca County Strategic Plan | EDA/Seneca County | \$140,000 | 2006-2007 |

5.9 Wayne County

The Wayne County economy includes a large number of small to medium sized manufacturing firms in a variety of operations. Machine shops, packaging firms, label production and related service operations and food production facilities along with a host of other types of manufacturing characterize the largest portion of Wayne County's economic base. A cluster of optical and plastics technology driven companies are located in the Town of Ontario. Expectations are that this cluster will grow over the next three to seven years. Agriculture and the related agribusiness sector form another key component of economic activity in the County. A number of industries are involved in bio technology, particularly in relation to animal vaccines, foods and training. It is expected that these industries, along with alternative energy industries, will grow over the next five years, with the agricultural industry strengthening in food production as well as possibly doubling production in order to grow crops for energy production.

The Wayne County Planning Department is involved in projects aimed at strengthening and diversifying the local economy through agricultural enhancement and redevelopment of existing commercial and industrial properties with unresolved environmental constraints. The department's agriculture specialist has been working with farmers, municipalities and other public agencies to make farming operations more efficient as well as environmentally sound. A Brownfields cleanup program has been created and an initial project in Sodus is underway. This program will assist in expanding the amount of

developable land in the County while alleviating pressure to develop open space and agricultural properties.

A stable, skilled workforce is available for new and expanding industrial development. The Wayne/Finger Lakes BOCES and FLCC continue to offer specific training skills. Monroe Community College also opened a satellite at the Wayne Central School in the Town of Ontario. The Finger Lakes Community College is relocating to Silver Hills Technology Park where the College will establish the Wayne County Campus Center, opening for September 2006 classes. Its location in the Silver Hills Technology Park will facilitate programs making use of the build-now New York site being developed, in part, as a pod of the Wayne County Sustainability Park for the study, use and development of alternative energy resources for industry.

Although there are several factors impacting the success of Wayne County's economic development efforts, one of the greatest challenges is the price of electricity. New York is known for its high cost of power and in the absence of alternative choices, Wayne County finds it difficult to compete for jobs with places offering lower electricity costs. Recognizing that predictable and affordable utility costs are key components of a successful economic development strategy, Wayne County has worked for three years designing the Wayne Industrial Sustainability Park (WISP). Modeled after a comprehensive, sustainable energy generation system implemented by a local industry, the WISP will offer cogeneration and distribution of thermal and wind generated power to industries as a way to attract and retain new jobs.

In December of 2005 the Wayne Industrial Development Agency assumed ownership of approximately 62 acres at the "shovel ready" Silver Hills Technology Park where the WISP will be designed and integrated into the fabric of existing development. Tenants already include Ferendyne Motors and UltraLife Batteries. By contracting with experts in the fields of energy and energy distribution, Wayne County is well positioned to take the next step by developing an industrial park supported by sustainable, renewable and predictably affordable energy.

It is important to offer creative solutions to problems standing in the way of job creation. Lowering our electricity costs enhances our ability to compete by leveling the playing field. Upstate New York has been forced to think outside the box to enhance our economic development position. A sustainable energy industrial park would position Wayne County as a leader in the field of innovative economic development solutions. In addition to jobs, this project could serve as an example for others to follow, perhaps leading to a renaissance of job opportunities in this region. Wayne County will clearly demonstrate that respect for the environment and aggressive economic development can coexist. The cost for the establishment of a sustainable industrial park in the County is estimated to be \$2.5 million. Over the next several years a hub for sustainable industry will be developed with pods serviced by a variety of alternative energy resources—bio-diesel, wind power, glycerin generators, geo-thermal—located at industrial parks and sites throughout the County. Wayne County Industrial Development Agency, with the

Wayne Industrial Sustainability Park, LDC, private industry advocates, developers of alternative energy resources and area residents who have formed the Wayne County Wind Energy Task Force, are creating an information, advocacy and development network for the support of the alternative energy industry.

Quality of life is a determining factor in the attraction of skilled labor, particularly high tech workers. The Wayne County Planning Department is involved in a multitude of issues concerned with raising the quality of life in the County for current citizens and potential employees of firms locating within Wayne County. Water resources planning initiatives involve preserving the quality of County water bodies and drinking and septic systems. Local septic inspection laws and the creation of a \$5.5 million wastewater treatment plant in Wolcott to collect discharges from private septic systems is representative of water resource protection and enhancement projects that directly affect quality of life issues in Wayne County. Many of the water quality programs are also closely tied to tourism development given Wayne County's location along Lake Ontario.

Important economic development and environmental opportunities for Wayne County also include water system expansions and upgrades to the systems in the northeast quadrant of the County, specifically to restore and develop adequate fire pressures and acceptable, reliable potable water to the Village of Wolcott, the area immediately surrounding the Village in the Town of Wolcott and the Town of Butler. Important to residents and businesses alike, this water upgrade is crucial to the retention and expansion of the northeastern Wayne County industrial base, which includes Electromark (Brady), Reckitt & Benckiser and Wegman's Egg Farm. The estimated cost for improvements, including the replacement of the existing waterline on the southern end of the Village of Wolcott south to Route 104, is \$3,700,000.

A continuing top infrastructure priority of the Wayne County IDA is the development of an access road to industrial land north of Route 104 and the Ontario Midland Railroad between Lincoln Road and Dean Parkway in the Town of Ontario. Currently, the Beh industrial area is serviced by the incomplete Dean Parkway an access road joining Route 104. Route 104 is a divided four-lane, east/west principal arterial road with Ontario-Midland Railroad tracks running parallel to the north of Route 104 through the Beh Industrial Park site and other industrially zoned land. Plans have been developed to extend Lincoln Road (which runs perpendicular to Route 104 to the east of Dean Parkway) across the railroad tracks connecting it with a western extension of Dean Parkway to form a completed access road through the industrial area. Local residents and businesses support the plan as it will decrease the number of vehicles that are now required to make U-turns to access the Beh Industrial Park when heading east in the southern lane of Route 104 and eliminate several driveways that need to cross the railroad.

The Town of Ontario is currently seeking funding for the completion of the project discussed above. Funding is a key issue as time constraints on the completion of the Lincoln Road extension are nearing. The extension of Lincoln Road across the Ontario-

Midland Rail Road tracks is seen as a primary means of attracting tenants to the industrial site.

Replacement of the antiquated sewer system at the campus of a major industrial facility (450-600 jobs) in the Town of Palmyra by a municipally or authority owned system continues to be the top priority infrastructure improvement at this time. Garlock Sealing Technologies, a 100+ year old plant is undergoing a major re-construction and re-organization of its production facility, located between Red Creek and the Erie Canal in the Town of Palmyra. A holding tank, pump station and new lines out to the public system are required during 2006. Genesee Finger Lakes Regional Planning Council, in conjunction with Greater Rochester Enterprise and Wayne County Industrial Development Agency have submitted an EDA pre-application in order to assist funding this crucial piece in the redevelopment of Garlock Sealing Technologies production facilities. The WCIDA, Empire State Development, New York State Department of Environmental Conservation, Senator Michael Nozzolio and the Village of Palmyra all assisted the company in filling financial gaps to clean-up the 142 acre brownfield site, retrofit specific existing buildings, demolish and build new buildings to house updated production and retain up to 600 jobs in the region. The last piece to be acted on is the funding of the upgraded sewer.

Other priority infrastructure improvements include a road extension for the Clyde Industrial Park; scattered site development of sustainable energy resources for industrial development; improvements to existing east-west transportation routes, including, but not limited to, Route 31 and Route 441, and possible implementation of past plans to either upgrade/expand or create another east-west route, addressing traffic constraint issues between the Webster/Penfield/Perinton areas out through the western sections of Wayne County. Exploration of using County Line Road as a major industrial parkway that could serve both Monroe and Wayne Counties should be initiated.

Tourism has received increased attention over the past few years and is one of the targeted areas in the draft strategic plan for economic development. One of the infrastructure additions prioritized, along with the on-going multi-use trail development and recreation/environmental destinations in various levels of completion across the county, is the establishment of a Lyons Amtrak Passenger Station. This effort, underway since 1990, would provide the longest stretch of rail along the Empire Corridor without passenger rail service, a station to connect the Finger Lakes/Lake Ontario region of Central and Western New York with such service, mid-way between Rochester and Syracuse. Grants totally \$1,020,000 have been secured for this project by Senator Michael Nozzolio, but a funding gap of approximately \$1million remains. This project has the potential of connecting tourists arriving via New York City or Toronto with rail access to Finger Lakes wine country, Erie Canal country and Lake Ontario through the Village of Lyons, providing an impressive regional impact for travelers at a time when automobile travel is becoming significantly more costly.

Work on development of a strategic plan for economic development within the County is nearing completion led by the Wayne County Industrial Development Agency, the Empire Zone Administration Board and the Wayne Economic Development Corporation, with Wayne County Board of Supervisors support. Completion and adoption is anticipated during the summer of 2006. A number of targeted industry clusters have been identified, including: alternative energy; agriculture and added value agriculture; photonics and optics; tourism; and focused machining and plastics.

The Strategic Plan will contain a prioritized list for Wayne County Industrial Parks to be upgraded to Build Now New York sites, if not by actual state certification, by meeting the requirements so that new businesses can be assured of smooth, swift processing of applications and permits. Engineering costs to achieve this will be considerable, so the expectation is that it will be done over the next three years for the existing eleven parks and an additional three to five sites.

Wayne County priority projects are listed in Table 31

| Table 31 - Wayne County Priorities | | | | |
|---|---|-----------------------|---------------|---------------------|
| Priority Number | Proposed Project (description) | Funding Sources | Total | Start- Finish Dates |
| WA-1 | Replacement sewer facilities plant in Palmyra | Federal | \$1.2 Million | 2006-2007 |
| WA-2 | Wayne Industrial Sustainability Park | Federal, IDA, Private | \$2.5 Million | 2006-2007 |
| WA-3 | Water Improvements Wolcott-WC NE Quadrant | To Be Determined | \$3.7 Million | 2006-2007 |
| WA-4 | Industrial Road-Town of Ontario | To Be Determined | \$4 Million | 2007-2008 |
| WA-5 | Road Extension for Clyde Industrial Park | To Be Determined | \$1 Million | 2007-2008 |

5.10 Wyoming County

During 2005, Wyoming County's economy continued its emergence from the negative impacts caused by the 2002-2003 national economic downturns. Powerful forces such as productivity gains in agriculture and manufacturing and relentless competition in commodity markets have caused widespread consolidation in these two key economic

sectors. These continuing global trends have caused the County to focus their efforts on the challenging task of rebuilding and diversifying our local economy.

The economic vitality of the county is closely tied to state and national business conditions that we have little control over. This emphasizes the importance of having an aggressive and effective economic and business development effort. Successful rural counties make a sustained commitment of adequate resources to retain and attract high value jobs.

The WC Board of Supervisors has recognized the importance of a strong county economy by supporting the following initiatives:

- Continuing to providing annual funding to the Wyoming County Chamber for business attraction and retention activities.
- The Wyoming County Industrial Development Agency (WCIDA) hired their first full time Executive Director in 2004. As a result, the WCIDA has significantly increased their economic development efforts especially in the areas of real estate and infrastructure development.
- Significant funds have been committed by the Board of Supervisors to support real estate and infrastructure development projects.
- Hopefully, the County will receive an Empire Zone in 2006. The lack of a Zone has hindered some projects.

After extremely challenging years in 2002 and 2003 because of much lower milk prices, 2004 saw a much needed rebound that continued in 2005. Dairy is big business in Wyoming County and supporting this economic sector is a top priority. In 2002 there were 75 farms whose annual sales exceeded \$500,000. The County has some of the largest and most modern dairy farms in the Northeast. Farming and agricultural services employ about 1,000 workers which ranks third among all NYS Counties.

The big question for 2006 is whether the national and upstate New York economies will continue growing. Interest rate increases from the Federal Reserve, coupled with unprecedented federal and trade deficits, and much higher energy prices, may threaten the current expansion that started in 2003.

The challenge for Wyoming and other rural counties is that the service and technology based industries that drove the economic expansion of recent years, saw nearly all of their growth occur in urban areas. This left most rural areas out of the expanding “new economy.” Except where there are colleges and universities, or amenities attractive to professional workers, rural areas generally do not have a large enough professional-level workforce to attract or develop “new economy” businesses.

As information technology develops, rural America may overcome its location disadvantage. However, rural areas must provide natural amenities, good schools,

transportation access, and other infrastructure to attract and retain "new economy" employers. An educated and trainable workforce is critical to attracting high wage service and technical jobs.

The Wyoming County Chamber and the WCIDA work together on business retention and small business development. This includes regular on-site visits and/or communications with all manufacturers, major employers, and companies with growth potential. Based on retention contacts, the Chamber and WCIDA respond to issues, concerns, and opportunities that are identified.

Retaining existing firms and assisting them is more important and cost-effective than the recruitment of new companies. Seventy to 80% of all business growth will come from expansion or modernization of existing firms that already employ local workers and pay local taxes. Supporting local entrepreneurs that will grow the next generation of employers is also essential. The Microenterprise Assistance and Downtown Revitalization programs focus their resources and efforts on small businesses and entrepreneurs.

A lack of infrastructure such as municipal water and sewer, access to an interstate highway, and inadequate telecommunication services are significant barriers to future development. The County also lacks shovel ready development sites and buildings. These barriers to development are reflected in the Wyoming County priority projects listed in Table 32

| Table 32 - Wyoming County Priorities | | | | |
|---|--|------------------------|---------------|---------------------|
| Priority Number | Proposed Project | Funding Sources | Total | Start- Finish Dates |
| WY-1 | Arcade Business Park | USDA, EDA, Local | \$1.5 Million | 2006-2007 |
| WY-2 | Westinghouse Site Improvements – Attica | US EPA, NYS DEC, Local | \$1.5 Million | 2006-2007 |
| WY-3 | Tri-County Business Park | EDA, USDA, Local | \$4.0 Million | 2007-2008 |
| WY-4 | Perry Business & Technology Park | EDA, USDA, Local | \$2.2 Million | 2007-2008 |
| WY-5 | County Telecommunications Improvements | TBD | TBD | 2007-2008 |
| WY-6 | Business Incubator Facility | USDA, GOSC, Local | \$1.0 Million | 2007-2008 |
| WY-7 | North Main Street Sewer Extension – Warsaw | EFC, USDA, Local | \$850,000 | 2007-2008 |

5.11 Yates County

Yates County has developed a diverse economic base, with no single dominant sector. High-tech and traditional local businesses continue to grow and expand, as does the

tourism industry and agriculture. Employment opportunities in the public sector, such as education and local government also continue to be an important component of the local economy. Yates is in the heart of the Finger Lakes and offers many natural amenities creating a high “quality of life” attraction.

Other amenities important for economic development are also present: such as significantly below market electric rates from the municipal utility in Penn Yan, an expanding general aviation airport, extensions of water and sewer infrastructure to new areas of the county, an abundance of fresh water, and the availability of a high speed fiber optic network from Adelphia Communications. Recent and planned improvements at the Yates County Airport, just south of Penn Yan, will create a more viable transportation alternative for the shipment of goods and will increase its attractiveness for long-distance corporate travel.

The year of 2005 saw the completion of many major construction projects Yates County. The projects include retail, tourism-related businesses and other commercial properties, such as the Best Western Vineyard Inn, Lyons National Bank, Dundee Foods and Keuka Footwear, Inc. Many of these projects represent highly visible improvements in the gateways to Penn Yan.

The appeal of the Finger Lakes Region continued to drive tourism growth in Yates County in 2005. Tourism has developed as the leading economic engine for the County, bringing visitors and spending to the area. The grand opening of the Best Western Vineyard Inn & Suites in downtown Penn Yan was the signature project for the expanding tourist trade in 2005.

The upsurge in tourism activity in Yates County can be attributed in large part to the vitality and expansion of wineries along Keuka and Seneca Lakes. The tourism and hospitality industry are now considered the largest employment sector in Yates County, according to the NYS Department of Labor and account for an economic impact of \$27 million annually. The growth in tourism activity can also be attributed to the county’s continued desirability as a destination for vacationers with second homes or cottages along all three of the Finger Lakes with shoreline in Yates County.

Recent development has witnessed over \$30 million of capital improvements in the winery industry, including a new tasting rooms for Fulkerson Winery, Keuka Springs Winery and Rooster Hill Winery. With the addition of the Best Western Vineyard Inn, the Inn at Glenora and Esperanza Mansion, there are now 142 new hotel rooms in Yates County for overnight accommodations.

The county remains the second largest producer of grapes in New York State and has seen resurgence in other areas of agriculture, as well. Yates County is the only county in New York, which has had an increase in the overall number of farms in recent years. The dairy industry has been reinvigorated, and value-added agricultural products, as well as crops for the organic market, have seen rapid growth in the county. In addition, many

visitors are attracted to the crafts and agricultural goods produced in the county, especially by the growing Mennonite population.

The availability of water and sewer service has been a limiting factor in Yates County for many years until recently. In prior years, these public services were limited to village centers and nearby areas. This situation is changing and may provide significant opportunities for development in other areas of the county. In addition to many infrastructure expansions in recent years, a feasibility study has recently been completed to provide water along the Route 14 Corridor, along Seneca Lake. This area is a key component to the growing tourism industry, with many wineries, lodging and other commercial businesses.

All of these infrastructure projects will provide needed services to existing residents, businesses and other as well as provide for future development. They also play an important role in the protection of the Keuka and Seneca Lake watershed areas from pressures created by increased development. The county's economic development strategy will be to promote and assist in the review of municipal plans and development policies in order to foster future development and protect the quality of life of the area.

The development of the Penn Yan waterfront area will be a major public/private initiative for the community in 2006. The creation of a suitable development plan is a primary objective of an inter-municipal task force headed by the Village of Penn Yan's Planning Board. The Waterfront Development Committee will be working to create a plan that will preserve the natural beauty, and future health, of the waterfront area, while at the same time maximizing this unique resource for community benefit.

The Yates County Industrial Development Agency, in cooperation with several local municipalities and the Economic Development Administration, has recently completed the development of an 85-acre industrial park. Horizon Business Park is the county's third business park and was necessitated by the lack of available industrial space in the county. Horizon Business Park is zoned Planned Business, and with its frontage along Route 14A, will allow commercial development at the entrance to the park in addition to a mixture of manufacturing and business service uses inside the Park's campus.

Currently, there are approximately 30 acres remaining for development in Horizon Business Park. In 2005, construction on Keuka Footwear, an Internet-based shoe distribution facility, was completed in the Park. In addition, CASP, LLC, a specialty food packaging firm, completed a 6,000 square foot expansion project to their existing facility. And, at the end of 2005, plans were finalized for the construction of a new auto service center at the park in 2006. The availability of attractive municipal electric rates from the Village of Penn Yan and shovel ready sites makes this a very attractive location for business expansion. Improvements to Horizon Business Park continue, including installation of a natural gas main throughout the park in 2005. Additional assistance may soon be required to improve access to the Park with the addition of turning lanes and a traffic control device.

Looking forward, the opportunity to obtain a New York State Empire Zone now appears to be in the near future. This much needed designation will assist in leveling the playing field with other NYS counties and provide Yates County in an important economic development tool.

| Table 33 - Yates County Priorities | | | | |
|---|---|----------------------------------|--------------------|----------------------|
| Priority Number | Proposed Project | Funding Sources | Total Project Cost | Dates |
| Y-1 | Route 14 Eastern Corridor Water District | EDA, USDA, EFC, NYS Small Cities | \$15,700,000 | 2006-2008 |
| Y-2 | Yates County Airport Taxiway and Runway Expansion | FAA, NYS, County | \$ 4,000,000 | 2006-2007 |
| Y-3 | Waterfront Redevelopment of Former Penn Yan Marine Facility | EPA, DEC, County | \$20,000,000 | 2006-2007 |
| Y-4 | Upgrade Himrod Water District & Ext. #1, Milo | NYS EFC DWSRF, , Local | \$ 2,850,000 | 2006-2007 (underway) |
| Y-5 | Branchport/West Bluff Drive Sewer District , Jerusalem | NYS EFC CWSRF | \$ 7,175,000 | 2006-2007 |
| Y-6 | Himrod Water Extension # 2, Milo | NYS EFC DWSRF, Local | \$ 2,500,000 | 2007-2008 |
| Y-7 | Torrey Water District #1 , Torrey | NYS EFC DWSRF, USDA, EDA, Local | \$ 4,000,000 | 2007-2008 |
| Y-8 | Starkey Water District #1 , Starkey | NYS EFC DWSRF, USDA, EDA, Local | \$ 6,500,000 | 2007-2008 |

Chapter 6 - 2006-2007 Goals, Strategies and Measures

6.1 Public Input Sessions

Three stakeholder input sessions were held throughout the G-FL region on March 28, 29 and 30 with the purpose of defining a regional vision and setting goals, strategies and measures. The first meeting was held in Rochester, NY, the population and geographic center of the region. The second meeting was held on the Western side of the region in Batavia, NY and the last meeting was held on the Eastern side of the region in Canandaigua, NY. Invitations were sent to various stakeholders throughout the region and public notices were placed in the Batavia Daily News and Finger Lakes Times. A list of attendees and a copy of the PowerPoint presentation at the three meetings can be found in Appendix 10 and 11, respectively.

6.2 Goals, Strategies and Measures

The goals, strategies, and measures were developed based on both formal and informal discussions held with the nine county Economic Development Departments/Industrial Development Agencies, Planning Departments and other various stakeholders. Also, the discussions at the CEDS Stakeholder Input Sessions helped to shape the goals, strategies and measures which appear below. A copy of the notes from those meetings can be found in Appendix 12.

| Goal I – Assist in the Retention and Expansion of Existing Industries in the District | | |
|--|---|--|
| Objective | Strategy | Measure |
| To continue to work with federal, state and local public sector partners and private sector partners to secure and leverage funding for the retention and expansion of existing industries and firms | <ul style="list-style-type: none">• Continue to foster relationships with commercial banks.• Work with local organizations and entities on packaging public and private financing options | <ul style="list-style-type: none">• Amount of funding secured and leveraged to retain firms and industries• Amount of private investment entering the region• Number of professional support inquiries |
| To continue to work in partnerships on different programs and initiatives | <ul style="list-style-type: none">• Continue to foster relationships with public and private sector partners to build public private partnerships and collaborate on projects• Seek out new partners for G/FLRPC's programs and initiatives• Work with and support any regional and/or county programs or initiatives | <ul style="list-style-type: none">• Number and diversity of new partnerships and collaborations• Number public and private partners G/FLRPC has in its programs and initiatives |

| Goal I – Assist in the Retention and Expansion of Existing Industries in the District (continued) | | |
|--|--|---|
| Objective | Strategy | Measure |
| To serve on and support the <i>Roadmap for the Revitalization of Upstate New York Manufacturing.</i> | <ul style="list-style-type: none"> • Active on Steering Committee • Writing letters of support | <ul style="list-style-type: none"> • Use information from the <i>Roadmap for the Revitalization of Upstate New York Manufacturing</i> in our work plan |

| Goal II – Assist in the Attraction of Industries and Firms to the District | | |
|--|---|--|
| Objective | Strategy | Measure |
| To bolster the competitiveness of the region's clusters | <ul style="list-style-type: none"> • Continue to support cluster-based initiatives and industry-led cluster organizations • Work on securing funding to more aggressively pursue the alternative fuel sector • Provide assistance to municipalities in siting wind farms and other alternative energy production facilities • Develop a public-private partnership to build organizational capacity for biodiesel fuel investment | <ul style="list-style-type: none"> • Amount of funding secured and leveraged to attract firms and industries in the region's clusters • Amount of private investment coming into the region • The existence of a biodiesel fuel investment public-private partnership • Number of professional support inquiries regarding alternative energy siting |
| To support other organizations and/or municipalities in the attraction of firms and industries | <ul style="list-style-type: none"> • Continue to work with GRE to refine Top Business and Site Selection Database and Mapping • Collect data to support and enhance local activities • Information requests and analysis will be performed for such things as Empire Zone data development | <ul style="list-style-type: none"> • Continued support of the site selection tool with an accurate and useful database • Number of professional support inquiries |
| To improve infrastructure in the region to further support new firms and industries | <ul style="list-style-type: none"> • Assist the Genesee Transportation Council's (GTC) Transportation Industrial Access and Goods Movements programs • Development of a Telecommunications Infrastructure Regional Development Plan | <ul style="list-style-type: none"> • Support provided to GTC's programs • A complete 9 county telecommunications inventory and assessment with accurate GIS files for the entire region • A completed Telecommunications Infrastructure Regional Development Plan with an implementation strategy |

| Goal II – Assist in the Attraction of Industries and Firms to the District (continued) | | |
|---|---|--|
| Objective | Strategy | Measure |
| To continue to support the efforts of the WIRED Initiative | <ul style="list-style-type: none">• Serve as a connection between the WIRED Initiative and the EDA• Continue to serve on the Governing Board, Operations Team and Implementation Teams | <ul style="list-style-type: none">• Correspondence between G/FLRPC and the EDA regarding WIRED• Meetings attended and contribution to the Governing Board, Operations Team and Implementation Teams |

| Goal III – Assist in the Upgrading of Skills of the District’s Workforce | | |
|---|---|---|
| Objective | Strategy | Measure |
| To support the Workforce Investment Boards and workforce organizations and/or municipalities to train workers for high-skill technical careers | <ul style="list-style-type: none">• Partner with and provide professional support to Workforce Investment Boards, organizations and/or municipalities | <ul style="list-style-type: none">• Number of professional support inquiries |
| To continue to serve in the development and implementation of the WIRED Initiative | <ul style="list-style-type: none">• G/FLRPC will continue to serve on the Governing Board, Operations Team and Implementation Teams of the Finger Lakes Partnership | <ul style="list-style-type: none">• Number of meetings attended and assistance provided to the WIRED Initiative |
| To prepare students (at the K-12 and community college level) for technical careers and in other competencies necessary to compete in a knowledge-based economy | <ul style="list-style-type: none">• Work with K-12 schools, school counselors and community colleges to better prepare students for technical careers | <ul style="list-style-type: none">• Number of meetings attended and assistance provided to educational institutions |

| Goal IV – Encourage Small Business Development and Entrepreneurship | | |
|--|---|--|
| Objective | Strategy | Measure |
| To encourage and support entrepreneurship and the entrepreneurial spirit | <ul style="list-style-type: none">• Support institutions, programs and initiatives that perform or support technology transfer in bringing technology to commercialization• Develop an entrepreneurs network | <ul style="list-style-type: none">• The establishment of optics and med-tech commercialization centers• The formation of an entrepreneurs network |

| Goal IV – Encourage Small Business Development and Entrepreneurship (continued) | | |
|--|--|---|
| Objective | Strategy | Measure |
| To provide better financing options and technical knowledge and support to small and medium-sized business owners | <ul style="list-style-type: none"> • Continue to administer a revolving loan fund • Develop a small business investment fund • Support the RIT CIMS Center in the assistance they provide to regional industries in developing and improving products | <ul style="list-style-type: none"> • Number of inquiries and loans closed from the revolving loan fund • The development of a small business investment fund • Utilization of information produced by the RIT CIMS Knowledge Clearinghouse and assistance provided to companies through Innovation Test Beds |
| To continue to partner with and support small business development and entrepreneurship programs and organizations | <ul style="list-style-type: none"> • Support institutions, programs and initiatives related to small business development • Build funding for and collaboration among partners for rural projects, such as the Rural Entrepreneurship Collaboration and E-Commerce Initiative | <ul style="list-style-type: none"> • Number of professional support inquiries • Secure funding for rural projects • Number of collaborations on rural projects |
| To increase the number and success of small businesses on main streets and at community centers | <ul style="list-style-type: none"> • Administer G/FLRPC's Community Centers program • Continue developing the case study communities in the Preparing Village Main Streets for Planning program • Continue to work with and support the Livingston and Wyoming Counties Downtown Revitalization Program • Continue to partner with university centers to incorporate consumer demographic analysis into Main Street projects | <ul style="list-style-type: none"> • Adopt the Village of Arcade Main Street Strategic Plan • Implementation of Main Street plans for Newark and Scottsville • Support offered to Livingston/Wyoming Counties through Village of Arcade Main Street Strategic Plan • Number of projects that incorporate consumer demographic analysis from university centers • Development and distribution of a Main Street Revitalization guidebook for local governments as part of the Preparing Village Main Streets for Planning program |
| To continue to serve in the development and implementation of the WIRED Initiative | <ul style="list-style-type: none"> • G/FLRPC will continue to serve on the Governing Board, Operations Team and Implementation Teams of the Finger Lakes Partnership | <ul style="list-style-type: none"> • Number of meetings attended and assistance provided to the WIRED Initiative |

| Goal V – Strengthen the Capacity of Counties and Local Governments to Undertake Economic Development Activities that Encourage Efficient Land Use and Development Patterns | | |
|---|--|--|
| Objective | Strategy | Measure |
| To resolve issues of development related to brownfield sites | <ul style="list-style-type: none"> • Administer NYS Brownfield Opportunity Areas program and complete a regional inventory to facilitate private sector investment and redevelopment of brownfield sites • Continue to work with the SUNY Center for Brownfield Studies to develop brownfield planning projects • Continue the education process with private sector developers of financing options available for brownfield redevelopment and risk mitigation tools | <ul style="list-style-type: none"> • The implementation of a NYS Brownfield Opportunity Areas program and US EPA Community-wide Brownfield Assessment program • A collaborative project with the SUNY Center for Brownfield Studies • Number of educational outreach events for private sector developers regarding brownfield redevelopment • Amount of private sector investment in brownfield sites |
| To encourage efficient land use and development patterns | <ul style="list-style-type: none"> • Ensure that comprehensive plans and regulations exist where needed • Build projects and funding to support local build out and fiscal analysis tools that promote fiscal health | <ul style="list-style-type: none"> • Number of professional support inquiries • Number of fiscal analyses and local build outs supported |
| To encourage local governments to consolidate and/or share services | <ul style="list-style-type: none"> • Perform fiscal analyses and seek funding for programs which aim to consolidate services | <ul style="list-style-type: none"> • Number of consolidated and/or shared services • Amount of money saved by local governments due to consolidated and/or shared services |
| To protect water quality | <ul style="list-style-type: none"> • Complete and implement the Local Laws to Protect Finger Lakes Water Quality program | <ul style="list-style-type: none"> • Distribution of the Protecting Water Resources through Local Regulation: A Guide for New York Municipalities publication |
| To develop and implement hazard mitigation plans that comply with state and national standards | <ul style="list-style-type: none"> • Work with counties to produce All-Hazard Mitigation Plans | <ul style="list-style-type: none"> • Completion and implementation of All-Hazard Mitigation Plans in Genesee, Livingston, Orleans, Wayne and Wyoming Counties |

| Goal VI – Enhance existing tourism opportunities and develop new recreation destinations and facilities | | |
|--|--|--|
| Objective | Strategy | Measure |
| To further develop the Finger Lakes Region as a destination spot | <ul style="list-style-type: none">• Support the Finger Lakes wine industry and culinary artisanship (e.g. Finger Lakes Wine and Food Center) | <ul style="list-style-type: none">• Number professional support inquiries |
| To further develop the recreational attributes of the region | <ul style="list-style-type: none">• Continue to develop the concept of blueways trails through securing funding for a NYS blueways program | <ul style="list-style-type: none">• The implementation of a NYS Blueways program |
| To utilize the Erie Canal as a tourism opportunity | <ul style="list-style-type: none">• Continue to serve on the Erie Canal Commission | <ul style="list-style-type: none">• Number of meetings and Erie Canal related projects |

| Goal VII – Strengthen Regional Coordination | | |
|--|--|---|
| Objective | Strategy | Measure |
| To collaborate as a region on programs and initiatives | <ul style="list-style-type: none">• Be involved in regional partnerships• Continue to foster relationships with public and private sector partners to build public private partnerships and collaborate on projects• Seek out new partners for G/FLRPC's programs and initiatives• Work with and support any regional and/or county programs or initiatives | <ul style="list-style-type: none">• Number professional support inquiries• Number and diversity of new and existing partnerships in which G/FLRPC is involved• Number public and private partners G/FLRPC has in its programs and initiatives |
| To promote information sharing in the region | <ul style="list-style-type: none">• Continue to use the EDAC/RDC meetings as a medium for information sharing• Continue to hold regional roundtables | <ul style="list-style-type: none">• Number of regional roundtables and other events that have an information sharing component |

| Goal VIII – Assist in the Retention of Manufacturing Employment | | |
|--|---|---|
| Objective | Strategy | Measure |
| To stabilize job losses in the manufacturing sector | <ul style="list-style-type: none">• Provide professional support to county IDAs and other organizations• Use local resources (e.g. RIT CIMS Center) to improve regional manufacturing related clusters | <ul style="list-style-type: none">• Number professional support inquiries |
| To provide gap financing to help current firms remain in the region | <ul style="list-style-type: none">• Administer the regional revolving loan fund• Collaborate with local banks and other private sector financial institutions and IDAs to provide funding options to manufacturing firms | <ul style="list-style-type: none">• Number of firms contacted and loans closed• Number of financial packages assembled to retain manufacturing firms |

| Goal IX – Strengthen Agriculture and Agri-business | | |
|---|---|---|
| Objective | Strategy | Measure |
| To facilitate the integration of agriculture into the alternative fuel sector | <ul style="list-style-type: none">• Work on securing and leveraging funding to more aggressively pursue the alternative fuel sector• Provide information on the siting of alternative fuel production sites (e.g. wind farms, biodiesel production facilities) | <ul style="list-style-type: none">• Amount of funding secured and leveraged to study/promote the alternative fuel sector• Number of alternative fuel production sites in the region• Number of professional support inquiries |
| To continue to educate and train on agricultural land use and economic development issues | <ul style="list-style-type: none">• Conduct sessions at Local Government Workshops on agricultural land use and economic development issues | <ul style="list-style-type: none">• Number of sessions and attendees at the Local Government Workshops on agricultural land use and economic development |

| Goal X – Work with Local Governments to Improve the Infrastructure of the District | | |
|---|--|--|
| Objective | Strategy | Measure |
| To improve transportation networks in the region | <ul style="list-style-type: none">• Continue to work with GTC through its Long Range Transportation Plan, Transportation Improvement Program, Unified Planning Work Program, and Regional Goods Movements Strategy• Continue to produce the Annual Land Use Monitoring Report• Continue to work with the FAA and NYSDOT as the lead agency for the NYSARC Aviation Program | <ul style="list-style-type: none">• The completion of the Long Range Transportation Plan, Transportation Improvement Program, Unified Planning Work Program, and Regional Goods Movements Strategy• The completion of the Annual Land Use Monitoring Report• A completed GIS aviation needs assessment |
| To improve telecommunications in the region | <ul style="list-style-type: none">• Development of a Telecommunications Infrastructure Regional Development Plan | <ul style="list-style-type: none">• A complete 9 county telecommunications inventory and assessment with accurate GIS files• A completed Telecommunications Infrastructure Regional Development Plan• Amount of funding secured and leveraged for telecommunications infrastructure investments |
| To increase energy efficiency, alternative energy production and usage and lower energy costs throughout the region | <ul style="list-style-type: none">• Continue to work with NYSERDA to bring grant and loan programs to the region that support traditional and alternative energy solutions | <ul style="list-style-type: none">• Amount of NYSERDA funding and private sector investment leveraged from it brought to the region• Number of NYSERDA programs utilized in the region• Number of professional support inquiries |

Chapter 7 - 2006 Work Program

This section provides an overview of the activities that G/FLRPC will undertake in 2006 as a continuum of services provided in general under its Economic Development program.

The work program involves specific activities and action steps that G/FLRPC will meet in the coming year. These actions will involve work on projects in economic development, planning, coordination and training that will promote the economic advantage of the District.

7.1 Community and Business Development

- Continue to foster relationships and build partnerships with public, private and non-profit organizations and entities in the region.
 - Continue to cultivate relationships with commercial banks and other financial institutions to provide finance packaging and options for private sector investment.
 - Continue to advance the establishment of public/private partnerships in order to align the efforts of different organizations and further leverage public sector grants and investments.
- Continue to work with federal, state, regional and municipal partners, the private sector, colleges and universities and other research institutions to foster the innovation efforts, processes and products in the region.
 - Work on the development of commercialization centers that bring R&D to the commercialization and marketplace. Special attention should be paid to commercialization centers for optics, med-tech and alternative energy.
 - Continue to work with the RIT CIMS Center on the Roadmap Initiative through serving on the project's steering committee and utilizing information from from the project.
- Continue to bolster the region's clusters by working with industry-led cluster organizations, firms within the clusters and public sector entities involved with cluster development.
 - Support industry-led cluster organizations through providing them information, education and training and promoting private and public sector investment in commercialization centers.
 - G/FLRPC will work with regional stakeholders in identifying and developing regional economic development clusters and emerging technologies including the Technology Farm, Infotonics, the Rochester Institute of Technology (RIT) CIMS Center Economic Cluster study, the Greater Rochester Enterprise fuel cell program and the Upstate Med-Tech initiative being led by Genesee County's Economic Development Center.

- Provide educational and professional support and financing options to firms and people involved in the alternative energy industry.
 - Provide counties and municipalities in the region with education and outreach and professional support about the siting of wind farms and other alternative energy production facilities.
 - Develop a public-private partnership to build organizational capacity for bio-diesel fuel investment in the region with one outcome being a bio-diesel fuel investment fund.
- Continue to work with public and private sector partners to develop, maintain and upgrade regional infrastructure in order to better compete in a knowledge-based economy.
 - Work to improve telecommunications infrastructure throughout the entire region.
 - Complete a regional telecommunications inventory and assessment for the remaining four counties in the region that have not completed one with GIS files that accompany it.
 - Use the regional telecommunications inventory and assessment to develop a Regional Telecommunications Infrastructure Development Plan which will provide a strategy for building optic fiber and increasing bandwidth and redundancy throughout the entire region and to guide private sector investment in telecommunications throughout the region.
 - Provide assistance to the Genesee Transportation Council in gathering the appropriate data necessary to inform recommendations for their regional transportation documents.
 - Continue to provide assistance on the Long Range Transportation Plan, Transportation Improvement Program, Unified Planning Work Program, and Regional Goods Movements programs.
 - Continue to produce the 2005 Annual Land Use Monitoring Report.
 - Continue to work with regional agencies in the State of New York to ensure that aviation data, existing and proposed development and other applicable work is in compliance with the Federal Aviation Administration while enhancing the economic viability of respective regions.
 - Continue to work with NYSERDA and other organizations develop and bring less costly and efficient energy options to the region.
 - G/FLRPC, through the NYSERDA regional Energy \$mart program, will work with regional stakeholders to evaluate energy efficient programs for businesses including energy target zones and regional energy plan development.
 - Build projects and funding to support a regional inventory and assessment (telecommunications, sewer, water, energy, etc.)

- Continue to work with partners to enhance the region's ability to compete during the site selection process.
 - Maintain a standardized compilation of information used in the site selection process to be readily available for dissemination to site selection consultants and others interested in relocating to or starting/expanding operations in the District.
 - Produce an assessment of needs regarding the business climate, infrastructure, availability of grant and loan programs and other issues affecting communities throughout the District.
 - Continue to partner with, and support the efforts of Greater Rochester Enterprise and County Industrial Development Agencies/Economic Development Departments in the site selection process.
 - Continue to work with GRE to refine the Top Business and Site Selection Database and Mapping.
 - Provide assistance to County IDAs with aerial imagery, mapping and data collection projects in support of site selection activities.
 - Continue to disseminate information that was collected through a "Transportation and Industrial Access" inventory that was completed in 2003. The inventory detailed industrial sites, parks and Brownfields in the region, including the identification of priority sites (deemed by regional stakeholders including planners, developers, etc.)
 - Information requests and analysis will be performed for activities such as economic data and Empire Zone data development.
- Work with various private and public sector partners to encourage the redevelopment of brownfield sites.
 - Complete a community-wide brownfield assessment that develops a regional brownfield education program, inventory and database and redevelopment/revitalization plan.
 - Administer the Brownfield Opportunities Area which facilitates the public and private sector working together to gain a better understanding of redevelopment options for brownfield sites and helps to garner private investment in brownfield sites.
 - Work with the New York State Association of Regional Councils (NYSARC) and the State University of New York (SUNY) system to develop a regional Brownfield program that is region and community-wide and seeks to redevelop and revitalize vacant properties.
- Support entrepreneurial activities and programs throughout the region.
 - Develop and create an entrepreneurs network for the region.

- Work with small and medium sized businesses and organizations that support them to deliver knowledge, financing options and other services that are only available to large firms.
 - Continue to administer and diversify the G/FLRPC's EDA Revolving Loan Fund program and portfolio and work with the Regional Development Corporation as they administer their loan fund. Continue to foster relationships with private sector investors to package with the G/FLRPC revolving loan fund.
 - Develop a small business investment fund.
 - Cultivate new programs and identify funding streams per the input of regional economic development stakeholders.
 - Build funding for and collaborations among partners for rural projects such as the Rural Entrepreneurship Collaboration and E-Commerce Initiative.
- Strengthen the vitality of and contribute to the revitalization of main streets and community centers throughout the region.
 - G/FLRPC has been actively working on Main Street Revitalization programs that have involved gathering input, coordinating discussion and forming public and private partnerships to address this task.
 - Such projects are the Downtown Strategic Plan for the Village of Arcade and Preparing Village Main Streets for Planning.
 - G/FLRPC will continue to work with distressed communities to revitalize their main streets and community centers by providing technical assistance, seeking project funding and facilitating dialogue and action amongst small business owners and regional providers, such as NYS Department of Transportation, The Governor's Office of Small Cities, etc...
 - Partner with university centers to incorporate consumer demographic analysis into Main Street projects and to identify other mutual aptitude areas that can be shared to benefit regional clients.
- Develop the region as a tourist destination.
 - Work with local tourist organizations to identify and capture opportunities such as the Erie Canal as economic stimulators in the region.
 - Continue to work on the development of the Erie Canal through serving on the NYS Canal Commission.

7.2 Professional Support

- G/FLRPC will continue to participate in the WIRED Initiative by providing support during the implementation phase. G/FLRPC will serve on the Governing Board, Operations Team and Implementation Teams. In addition, G/FLRPC will fulfill the role of being a connection between the EDA and the WIRED Initiative.

- Continue to provide assistance to municipal governments to build projects that support local build out and fiscal analysis tools which will provide local governments with information that will aid in their fiscal health.
 - Assist local governments in consideration and studies about the costs and/or benefits of consolidation and/or sharing services.
 - Work with local School Districts on enrollment projections to identify current and future needs, as well as forecasting methods to finance potential growth.
- Provide GIS/Remote Sensing (satellite, aerial and digital photography), technical assistance and support through activities such as mapping and database creation to support economic development functions, digitizing land use and compiling digital images.
- Continue to distribute the Genesee-Finger Lakes Regional Atlas that provides a comprehensive compendium of regional data in digital format.
 - The Atlas and associated county profiles have been finalized and used extensively throughout the Region.
- Provide Hazard Mitigation Services that comply with state and national standards.
 - In 2005, G/FLRPC worked with Wayne and Livingston Counties to produce All-Hazard Mitigation Plans that comply with the Disaster Mitigation Act of 2000. In 2006, G/FLRPC will continue to work with these and other counties including Genesee, Wyoming and Orleans Counties. By having these plans in place, the respective communities mentioned are in a better position to respond to disasters from a land use and economic development perspective.
 - G/FLRPC will identify homeland security issues as they directly relate to economic development and land use. Planning processes and products will take this into consideration.
- G/FLRPC will continue to work with regional and state entities to improve the master address file for the 2010 Census.
- Identify existing networks to support agricultural economic development. Connect partners and funding to optimize regional benefit.

7.3 State Data Center Affiliate Program

- Fill information and data services requests from citizens, businesses, not-for-profit organizations and public agencies so regional clients are equipped with the most recent and effective data.
- Maintain socio-economic and demographic data. An aspect of this service is a dedicated section of G/FLRPC's website (www.gflrpc.org) that features all currently available data as received by G/FLRPC and analysis of major issues as they arise including population change and age-cohort analysis.

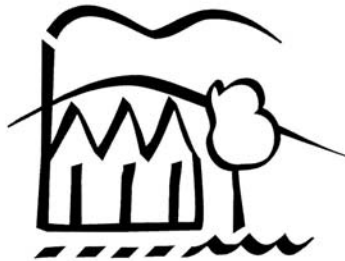
- Requests will be submitted and filled for other types of data and information that is more specialized.
- Partner with the New York State Data Center and university centers to deliver better data to regional stakeholders. Also, work on effective and efficient data collection methods in anticipation of the 2010 Census.

7.4 Coordination & Training

- Hold workshops to train and inform local and county officials and others about land use regulations and emerging planning and development issues.
 - The Regional Local Government Workshops have taken on a broader local government focus with continued participation by code and zoning enforcement officers and planning and zoning board members, as well as municipal council and board members, elected officials and others.
 - G/FLRPC will continue to facilitate Regional Roundtable discussions in an effort to gather various perspectives on important regional topics in an effort to promote effective communication, collaborations and public/private/non-profit ownership of goals, methods of implementation and measurements to monitor progress.
 - G/FLRPC looks to develop additional workshops that will examine Energy Efficiency in the region and Small Business Development and Support.
- Attend relevant training and professional development conferences and workshops offered by state and national agencies involved directly and indirectly in economic development to further increase support capabilities to agencies throughout the District.
 - G/FLRPC staff will continue to attend training courses and conferences that will enhance their economic development aptitudes.
- Update and polish the information and links on G/FLRPC's website. G/FLRPC's website will serve as a location for regional marketing, information/data dissemination, and partnership coordination/promotion and product generation

Appendix

Appendix 1 - CEDS Stakeholder Input Session Invitation



The Genesee/Finger Lakes Regional Planning Council invites you to attend a Stakeholder Input Session to inform the region's Comprehensive Economic Development Strategy

The Genesee/Finger Lakes Regional Planning Council is in the process of preparing the annual Comprehensive Economic Development Strategy (CEDS). The CEDS is intended to guide economic growth in the region and produce the following outcomes: the creation of jobs, cultivation of a stable and diverse economy and improvement in the overall quality of life in the region.

A successful region is one where various groups share a vision and coordinate efforts in order to realize that vision. The CEDS process enables the region to form a vision and an accompanying implementation strategy to make the vision a reality.

The CEDS is a dynamic process which includes broad stakeholder participation. The stakeholder input component of the process is integral to the success of the strategy. If you would like additional information about the CEDS, please visit <http://www.gflrpc.org/ProgramAreas/EconomicDevelopment/CEDS.htm>

Please join us at one of the following stakeholder meetings:

- ♦ City Place, 8th Floor Conference Room
50 West Main St., Rochester, NY
Tuesday, March 28 from 10am-12pm
- ♦ Genesee County Economic Development Center, Board Room
One Mill Street, Batavia, NY
Wednesday, March 29 from 2-4pm
- ♦ Ontario County Office Building, 3rd Floor Conference Room
20 Ontario Street, Canandaigua, NY
Thursday, March 30 from 2-4pm

If you plan on attending, please contact Greta Goldberg at (585) 454-0190 ext. 12 or via e-mail at ggoldberg@gflrpc.org

Appendix 2 - CEDS Summary Sheet

**Genesee/Finger Lakes Regional Planning Council
Comprehensive Economic Development Strategy
Goals (2006-2007)**

Goal I: Assist in the Retention and Expansion of Existing Industries in the District

- To continue to work with federal, state and local public sector partners and private sector partners to secure and leverage funding for the retention and expansion of existing industries and firms
- To continue to work in partnerships on different programs and initiatives
- To serve on and support the *Roadmap for the Revitalization of Upstate New York Manufacturing*

Goal II: Assist in the Attraction of Industries and Firms to the District

- To bolster the competitiveness of the region's clusters
- To support other organizations and/or municipalities in the attraction of firms and industries
- To improve infrastructure in the region to further support new firms and industries
- To continue to support the efforts of the WIRED Initiative

Goal III: Assist in the Upgrading of Skills of the District's Workforce

- To support the Workforce Investment Boards and workforce organizations and/or municipalities to train workers for high-skill technical careers
- To continue to serve in the development and implementation of the WIRED Initiative
- To prepare students (at the K-12 and community college level) for technical careers and in other competencies necessary to compete in a knowledge-based economy

Goal IV: Encourage Small Business Development and Entrepreneurship

- To encourage and support entrepreneurship and the entrepreneurial spirit
- To provide better financing options and technical knowledge and support to small and medium-sized business owners
- To continue to partner with and support small business development and entrepreneurship programs and organizations
- To increase the number and success of small businesses on main streets and at community centers
- To continue to serve in the development and implementation of the WIRED Initiative

Goal V: Strengthen the Capacity of Counties and Local Governments to Undertake Economic Development Activities that Encourage Efficient Land Use and Development Patterns.

- To resolve issues of development related to brownfield sites
- To encourage efficient land use and development patterns
- To encourage local governments to consolidate and/or share services
- To protect water quality
- To develop and implement hazard mitigation plans that comply with state and national standards

Goal VI: Enhance existing tourism opportunities and develop new recreation destinations and facilities

- To further develop the Finger Lakes Region as a destination spot
- To further develop the recreational attributes of the region
- To utilize the Erie Canal as a tourism opportunity

Goal VII: Strengthen Regional Coordination

- To collaborate as a region on programs and initiatives
- To promote information sharing in the region

Goal VIII: Assist in the Retention of Manufacturing Employment

- To stabilize job losses in the manufacturing sector
- To provide gap financing to help current firms remain in the region

Goal IX: Strengthen Agriculture and Agri-business

- To facilitate the integration of agriculture into the alternative fuel sector
- To continue to educate and train on agricultural land use and economic development issues

Goal X: Work with Local Governments to Improve the Infrastructure of the District

- To improve transportation networks in the region
- To improve telecommunications in the region
- To increase energy efficiency, alternative energy production and usage and lower energy costs throughout the region

Appendix 3 - Minutes from the June 8, 2006 G/FLRPC Meeting

Genesee/Finger Lakes Regional Planning Council

Minutes

29th Annual Meeting

Thursday, June 8, 2006

10:30 A.M.

Canandaigua Inn On The Lake

770 South Main Street

Canandaigua, New York

Members or

Alternates Present: Esther Leadley, Chair; Charles Zambito; Steve Hyde; Robert Yull; Wayne Zyra; Jeffrey Adair; Linda Dobson; Kal Wysokowski; Leslie Bamann; Lloyd Kinnear; Glenn Cooke; James Hoffman; James Fabino; Jerry Davis; Donald House; Chris Wilson; Wilfred Brooks

Ex-Officio

Members: Paul Johnson; Kristen Hughes; Steve Isaacs; James Stack

Presenters/

Guests: Alexa Gifford, NY Wine & Culinary Center
Arnold Gray and Lyndsay Jones, Gray Certified Public
Accounting, P.C.
Greg Parker, Empire State Development

Staff: David Zorn; Rudeen Armstrong; Joseph Bovenzi; Mark Denecke;
Greta Goldberg; Jason Haremza; Brian Slack; Christopher Tortora

Interns: Julie Gotham; Austin Judkins

1. Call to Order: The June 9th Annual Meeting was called to order at 11:00 A.M. by Chair Esther Leadley. She welcomed all members and guests to the Council's meeting.

2. Approval of Minutes: Ms. Leadley noted that minutes of the following minute(s) had been mailed to all Council members:

-Regional Council Meeting on March 9, 2006

As there were no corrections, additions or deletions, the minutes were approved; motioned by Linda Dobson; Robert Yull seconded; carried unanimously.

Prepared by Genesee/Finger Lakes Regional Planning Council

3. Financial Statement – 2006 Budget Amendment – Resolution #2006-2: Esther Leadley asked David Zorn to review the Council's Financial Statement for the period ending May 31, 2006. Dave noted that the statement reflected revenues and expenditures acquired to date. He requested that the following budget line items be amended due to the recent purchase of a new agency car:

| | <u>Current</u> | <u>Amended</u> |
|----------------------------|----------------|----------------|
| Automobile Expense | \$ 3,000 | \$ 500 |
| Automobile Purchase | \$ 14,000 | \$ 12,698 |
| Automobile Reserve Bank CD | \$ 2,500 | \$ 5,000 |
| Contingency | \$280,133 | \$281,435 |

The financial statement was unanimously approved by the Council.

4. 2007 Preliminary Budget: Dave reviewed a narrative and comparison budgets for 2006 and 2007. The preliminary 2007 Budget reflects a \$767,000 decrease in revenue and expenditure as a result of the completion of the Department of Justice Electric Field Study.

Dave noted that the Executive Committee had recommended reducing the Automobile Expense budget line from \$1,000 to \$500 and increasing the Automobile Reserve CD account from. \$2,500 to \$3,000.

The overall budget will be reviewed again at the December meeting when most funding resources are more finalized.

5. Status of Regional Revolving Loan Fund: Dave Zorn summarized the Council's Revolving Loan Fund's status report for the period ending May 31, 2006.

Community Mill — Wayne County's IDA has purchased the first security position from the National Bank of Geneva. The Court will determine a judgment regarding the purchase, which will address the various costs associated with the transaction, including legal fees. Once settlement is made, Council staff will discuss our options with Wayne County's IDA.

Approved Loan(s): Northern Biodiesel, Inc. -\$200,000 Working Capital Loan (6 Years @4%) (The company plans to start a biodiesel production facility in Ontario, New York — Wayne County).

HF Technologies -\$70,000 Fixed Asset Loan (6 Years @ 4%) (Company manufactures elastomeric products for

printers and copiers. The product base comprises of Teflon and silicone coated rollers that are predominantly used in the fusing section of a copier/printer).

Application(s): SMG Direct —\$70,000 Working Capital Loan
(Direct marketing and promotions. The company traces its roots to an advertising and promotional communications agency which has served area corporations including Xerox, Kodak and Bausch & Lomb).

Heirloom Designs, LLC —\$100,000 Working Capital Loan
(Cabinet Manufacturer)

Resolution #2006-3 — RLF Administrative Charges David Zorn asked the Committee to approve the transfer of \$5,897.54 from the RLF Savings Account into the Council's General Savings Account to cover the loan fund's administrative expenditures (i.e. professional services, copying/printing, postage, etc. — December 2005 - May 31, 2006).

Leslie Bamann moved Resolution #2006-3. Glenn Cooke seconded/carried unanimously.

6. Collaboration Agreement — Resolution #2006-4: Esther Leadley explained that the final draft of the Council's Collaboration Agreement was distributed to member counties' chairs and attorneys for review. Staff has received all nine County Resolutions in support of the Agreement. Ms. Leadley continued by explaining that the Council's Resolution #2006-4 would bridge member counties' ratification of the document.

Wayne Zyra moved Resolution #2006-4. Jerry Davis seconded/carried unanimously.

7. By Laws — Resolution #2006-5: Esther Leadley explained that as part of the revision process, the Council's attorney James Townsend had drafted the Council's By-Laws into two separate documents, a Collaboration Agreement and By-Laws. Prior to this process it was noted the Council's original By-Laws appeared to merge the two together and that two separate documents would be proper. By-Laws are more flexible for changes than a Collaboration Agreement which requires County Resolutions for revision.

Willie Brooks moved Resolution #2006-5. Leslie Bamann seconded/carried unanimously.

8. Comprehensive Economic Development Strategy (CEDS) - Resolution #2006-6: The Comprehensive Economic Development Strategy (CEDS) document is an annual funding requirement by the Economic Development Administration. The nine Counties and the City of Rochester's planning and economic development departments have

provided priority projects to be included in the report for consideration of public works funding. Upon approval by the full Council, the document will be forwarded to the Economic Development Administration.

Jeffrey Adair moved Resolution #2006-6. Kal Wysokowski seconded/carried unanimously.

9. Genesee County All-Hazard Mitigation Plan — Resolution #2006-7 The Office of Emergency Management requests the assistance of the Council to work with Genesee County to assist in the development of an All-Hazard Mitigation Plan. The contract amount is \$60,000 for the period of March 22, 2006 through March 31, 2007.

Jeffrey Adair made a motion to move Resolution #2006-7. Willie Brooks seconded/carried unanimously.

10. Orleans County All-Hazard Mitigation Plan — Resolution #2006-8: The Office of Emergency Management requests the assistance of the Council to work with Orleans County to assist in the development of an All-Hazard Mitigation Plan. The contract amount is \$45,000 for the period of February 22, 2006 through October 27, 2007.

Jeffrey Adair motioned to move Resolution #2006-7. Willie Brooks seconded/carried unanimously.

11. Regional Projects Update/ Intergovernmental Projects Review: Dave Zorn summarized the Council's various programs and activities for the 2nd quarter of 2006 including the spring local government workshop and the latest listing of Intergovernmental Project Reviews. He also presented the 2005-2006 Annual Report.

12. Nominating Committee: Nominating Committee Report: Willie Brooks announced the following slate of Council officers for 2006-2007. The floor was opened for additional nominations, being none, Wayne Zyra moved to accept the presented slate of officers; the Council unanimously approved the slate of officers.

| | |
|----------------|------------|
| Esther Leadley | Chair |
| James Hoffman | Vice Chair |
| Jeffrey Adair | Treasurer |

13. 2005 Audit Review: Arnold Gray (Gray Certified Public Accounting), the Council's auditor for the period ending December 31, 2005 summarized the audit. Mr. Gray stated that the purpose of the audit is to provide an overall position of the Council, to examine federal programs compliance requirements, and follows-up on procedural recommendations. He also reviewed the 2004 Management Letter recommendations and actions. Mr. Gray reported that the 2005 Audit was a 'clean audit', and that the Council was in good financial condition.

14. Presentation and Tour: New York Wine and Culinary Center (Alexa Gifford, Executive Director): Ms. Gifford provided some history on the Center indicating that in 2002 Constellation Brands, Inc., NY Wine & Grape Foundation, Rochester Institute of Technology and Wegmans Food Markets came together with a common goal to create a gateway for the people of New York and around the world to experience NY's wine and food industries. After three years of research and planning, this partnership of corporate, academic and government organizations formed the nonprofit NY Wine and Culinary Center. The \$7.5 million facility is supported, in part, by grants and contributions from agriculture, culinary and wine businesses as well as the state and federal governments. Some of the features of the Center include a wine tasting room, hands-on-kitchen, a demonstration theater, taste of New York lounge, private dining room, exhibit hall, retail shop and a New York garden with seasonal displays of native New York agriculture, including grape vines, fruit trees and vegetables. The official grand opening of the facility is scheduled for June 17th.

Next Regional Council Meeting

Thursday, September 14, 2006
10:30 A.M.

Radisson Hotel
175 Jefferson Road
Henrietta, New York

Ra

Appendix 4 – Minutes from the March 22, 2006 EDAC/RDC Meeting

MINUTES OF 3/22/06

Present: Lydia Birr, Dana Brunett, Margaret DelPlato, Clyde Forbes, Greta Goldberg, Steve Griffin, Roberta Hutchinson, Steve Isaacs, Jack Kinnicutt, Julie Marshall, Richard Perrin, Mark Peterson, Vicki Pratt, Pat Rountree Judy Seil and Dave Zorn

Call to Order: The meeting was called to order by President Steve Isaacs at 10:08 a.m. at the law offices of Harris Beach PLLC in Pittsford, NY.

Financial Report: The Treasurer's report was presented by Julie. Expenses for year end were payments made to Dick Boerman. There has been a carry over of funds from 2005 that will likely be used for marketing. The report was approved on motion by Vicki, seconded by Roberta and carried.

Loan Fund Report: Dick Boerman was not in attendance but in his absence, Steve Isaacs presented the report. The report was approved on motion by Pat, seconded by Julie and carried.

The future of the RDC RLF was discussed. At this point, all the state money has been drawn down to administer the fund. Steve Isaacs presented a summary of the RLF administrative costs (attached). Perhaps RDC should look to other regional organizations to maintain the existing portfolio (ROI and G/FL were mentioned), provided that ESD approved the portfolio transfer. There is \$250M remaining to lend out.

Through ESD there must be clarification regarding how to transfer this fun to another organization. A further conversation will need with ESD. As a result of this discussion, a motion was made by Pat, seconded by Vicki, to authorize the RDC President to contact ESD and begin termination of the RDC administrative responsibilities for the regional loan fund. Motion carried.

GRE: Vicki Pratt & Mark Peterson were present. Vicki distributed the marketing piece on Barilla, which acknowledged the multiple levels of collaboration. Mark talked about the National Seed and Venture Fund event that will take place in Rochester this fall. This is a tremendous opportunity to market the region

Livingston County: Pat Rountree & Julie Marshall were present. They thanked everyone for their support on the Barilla project and discussed the history and results of the announcement.

G/FL RPC: Dave Zorn and Greta Goldberg were present. Greta has been working on the CEDS which will be a full document this year. RLF money is available.

GTC: Rich Perrin was present. Transportation and Industrial Access is in its next phase where a consultant will look at the high priority sites. The Regional Goods Movement study is being reviewed.

Empire State Development: Jack Kinnicutt was present. He presented on ESD's MAP (Manufacturers Assistance Program).

Presenters: Robert J. Ryan, Esq. And colleagues of Harris Beach PLLC presented and discussed the Public Authority and Accountability Act of 2005.

Next Meeting: June 10, 2006 at 10:00 at Greater Rochester Enterprise Offices
HSBC Plaza

The meeting was adjourned at approximately 11:45 p.m. This was approved on motion by Pat, seconded by Vicki and carried.

Respectfully submitted,
Margaret M. DelPlato
Secretary

Appendix 5 - Major Industry Sectors Present in the G-FL Region

**Table A-5 – Major Industry Sectors, NAICS Code and
Industry Subsectors Present in the G-FL Region**

| Major Industry Sector | NAICS | Industry Subsector |
|--|-------|---|
| Agriculture, Forestry, Fishing and Hunting | 111 | Crop Production |
| | 112 | Animal Production |
| | 113 | Forestry and Logging |
| | 115 | Agriculture & Forestry Support Activity |
| | | |
| Mining | 211 | Oil and Gas Extraction |
| | 212 | Mining (except Oil and Gas) |
| | | |
| Utilities | 221 | Utilities |
| | | |
| Construction | 236 | Construction of Buildings |
| | 237 | Heavy and Civil Engineering Construction |
| | 238 | Specialty Trade Contractors |
| | | |
| Manufacturing | 311 | Food Manufacturing |
| | 312 | Beverage & Tobacco Product Manufacturing |
| | 313 | Textile Mills |
| | 314 | Textile Product Mills |
| | 315 | Apparel Manufacturing |
| | 321 | Wood Product Manufacturing |
| | 322 | Paper Manufacturing |
| | 323 | Printing and Related Support Activities |
| | 324 | Petroleum & Coal Products Manufacturing |
| | 325 | Chemical Manufacturing |
| | 326 | Plastics & Rubber Products Manufacturing |
| | 327 | Nonmetallic Mineral Product Manufacturing |
| | 331 | Primary Metal Manufacturing |
| | 332 | Fabricated Metal Product Manufacturing |
| | 333 | Machinery Manufacturing |
| | 334 | Computer and Electronic Product Manufacturing |
| | 335 | Electrical Equipment and Appliances |
| | 336 | Transportation Equipment Manufacturing |
| | 337 | Furniture and Related Product Manufacturing |
| | 339 | Miscellaneous Manufacturing |

**Table A-5 – Major Industry Sectors, NAICS Code and
Industry Subsectors Present in the G-FL Region**

| Major Industry Sector | NAICS | Industry Subsector |
|-------------------------------------|-------|--|
| Wholesale Trade | 423 | Merchant Wholesalers, Durable Goods |
| | 424 | Merchant Wholesalers, Nondurable Goods |
| | 425 | Electronic Markets and Agents/Brokers |
| Retail Trade | 441 | Motor Vehicle and Parts Dealers |
| | 442 | Furniture and Home Furnishings Stores |
| | 443 | Electronics and Appliance Stores |
| | 444 | Building Material & Garden Supply Stores |
| | 445 | Food and Beverage Stores |
| | 446 | Health and Personal Care Stores |
| | 447 | Gasoline Stations |
| | 448 | Clothing and Clothing Accessories Stores |
| | 451 | Sporting Goods/Hobby/Book/Music Stores |
| | 452 | General Merchandise Stores |
| | 453 | Miscellaneous Store Retailers |
| | 454 | Nonstore Retailers |
| Transportation and Warehousing | 481 | Air Transportation |
| | 484 | Truck Transportation |
| | 485 | Transit and Ground Passenger Transport |
| | 486 | Pipeline Transportation |
| | 487 | Scenic and Sightseeing Transportation |
| | 488 | Support Activities for Transportation |
| | 492 | Couriers and Messengers |
| Information | 493 | Warehousing and Storage |
| | 511 | Publishing Industries |
| | 512 | Motion Picture & Sound Recording |
| | 515 | Broadcasting (except Internet) |
| | 516 | Internet Publishing and Broadcasting |
| | 517 | Telecommunications |
| | 518 | ISPs, Search Portals, & Data Processing |
| Finance and Insurance | 519 | Other Information Services |
| | 522 | Credit Intermediation & Related Activity |
| | 523 | Financial Investment & Related Activity |
| | 524 | Insurance Carriers & Related Activities |
| Real Estate, Rental and Leasing | 525 | Funds, Trusts & Other Financial Vehicles |
| | 531 | Real Estate |
| | 532 | Rental and Leasing Services |
| Professional and Technical Services | 541 | Professional and Technical Services |

**Table A-5 – Major Industry Sectors, NAICS Code and
Industry Subsectors Present in the G-FL Region**

| Major Industry Sector | NAICS | Industry Subsector |
|--|--------------|--|
| Management of Companies and Enterprises | 551 | Management of Companies and Enterprises |
| Administrative and Support and Waste Management and Remediation Services | 561 | Administrative and Support Services |
| | 562 | Waste Management and Remediation Service |
| Health Care and Social Assistance | 621 | Ambulatory Health Care Services |
| | 622 | Hospitals |
| | 623 | Nursing and Residential Care Facilities |
| | 624 | Social Assistance |
| Arts, Entertainment and Recreation | 711 | Performing Arts and Spectator Sports |
| | 712 | Museums, Parks and Historical Sites |
| | 713 | Amusement, Gambling & Recreation |
| Accommodation and Food Services | 721 | Accommodation |
| | 722 | Food Services and Drinking Places |
| Other Services (except Public Administration) | 811 | Repair and Maintenance |
| | 812 | Personal and Laundry Services |
| | 813 | Membership Organizations & Associations |
| | 814 | Private Households |
| Government | | Federal Government |
| | | State Government |
| | | Local Government |
| Unclassified | | Unclassified |

Appendix 6 - Economic Indicators for the G-FL Region by Industry Subsector (2004)

Table A-6 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2004)

| Industry Subsector | Establishments | Employment | Average Annual Wage (in dollars) | Location Quotient | Export Employment |
|---|-----------------------|-------------------|---|--------------------------|--------------------------|
| Crop Production | 252 | 3,306 | 19,002 | 1.44 | 1,011 |
| Animal Production | 149 | 2,113 | 26,474 | 2.45 | 1,250 |
| Forestry and Logging | 9 | 68 | 29,291 | 0.23 | -230 |
| Agriculture & Forestry Support Activity | 36 | 390 | 24,859 | 0.31 | -887 |
| Oil and Gas Extraction | 4 | 17 | 37,623 | 0.03 | -491 |
| Mining (except Oil and Gas) | 42 | 596 | 44,614 | 0.70 | -259 |
| Utilities | 21 | 2,145 | 78,332 | 0.91 | -212 |
| Construction of Buildings | 782 | 5,384 | 42,595 | 0.80 | -1,358 |
| Heavy and Civil Engineering Construction | 117 | 1,728 | 48,166 | 0.46 | -1,999 |
| Specialty Trade Contractors | 1,768 | 11,744 | 37,129 | 0.64 | -6,546 |
| Food Manufacturing | 122 | 6,083 | 36,364 | 0.98 | -107 |
| Beverage & Tobacco Product Manufacturing | 32 | 1,744 | 50,577 | 2.17 | 942 |
| Textile Mills | 6 | 266 | 44,140 | 0.27 | -719 |
| Textile Product Mills | 16 | 279 | 28,544 | 0.38 | -455 |
| Apparel Manufacturing | 18 | 883 | 30,728 | 0.75 | -294 |
| Wood Product Manufacturing | 51 | 730 | 29,415 | 0.32 | -1,537 |
| Paper Manufacturing | 37 | 1,759 | 41,242 | 0.85 | -303 |
| Printing and Related Support Activities | 165 | 3,130 | 38,791 | 1.14 | 383 |
| Petroleum & Coal Products Manufacturing | 7 | 93 | 44,891 | 0.20 | -373 |
| Chemical Manufacturing | 36 | 17,445 | 69,041 | 4.76 | 13,781 |
| Plastics & Rubber Products Manufacturing | 87 | 5,910 | 38,033 | 1.77 | 2,579 |
| Nonmetallic Mineral Product Manufacturing | 61 | 1,716 | 42,882 | 0.82 | -369 |
| Primary Metal Manufacturing | 13 | 507 | 45,102 | 0.26 | -1,418 |
| Fabricated Metal Product Manufacturing | 323 | 9,076 | 39,452 | 1.47 | 2,890 |
| Machinery Manufacturing | 313 | 17,014 | 62,937 | 3.61 | 12,298 |
| Computer and Electronic Product Manufacturing | 109 | 7,890 | 59,848 | 1.44 | 2,411 |
| Electrical Equipment and Appliances | 22 | 1,476 | 41,663 | 0.80 | -370 |
| Transportation Equipment Manufacturing | 30 | 6,055 | 52,751 | 0.83 | -1,230 |
| Furniture and Related Product Manufacturing | 57 | 745 | 31,811 | 0.32 | -1,620 |
| Miscellaneous Manufacturing | 108 | 4,554 | 54,563 | 1.68 | 1,847 |
| Merchant Wholesalers, Durable Goods | 867 | 10,674 | 50,433 | 0.88 | -1,510 |
| Merchant Wholesalers, Nondurable Goods | 330 | 5,265 | 49,150 | 0.64 | -3,024 |
| Electronic Markets and Agents/Brokers | 408 | 2,009 | 53,772 | 0.70 | -876 |
| Motor Vehicle and Parts Dealers | 519 | 7,901 | 35,985 | 1.01 | 45 |
| Furniture and Home Furnishings Stores | 193 | 1,825 | 25,748 | 0.79 | -490 |
| Electronics and Appliance Stores | 218 | 1,942 | 30,472 | 0.91 | -182 |
| Building Material & Garden Supply Stores | 337 | 5,856 | 23,933 | 1.16 | 789 |
| Food and Beverage Stores | 584 | 17,364 | 15,952 | 1.49 | 5,683 |
| Health and Personal Care Stores | 272 | 3,282 | 24,654 | 0.84 | -610 |
| Gasoline Stations | 433 | 3,543 | 16,354 | 0.98 | -81 |
| Clothing and Clothing Accessories Stores | 466 | 4,581 | 14,156 | 0.81 | -1,044 |
| Sporting Goods/Hobby/Book/Music Stores | 256 | 2,719 | 14,599 | 1.03 | 77 |
| General Merchandise Stores | 179 | 9,453 | 15,931 | 0.80 | -2,302 |
| Miscellaneous Store Retailers | 429 | 3,224 | 15,810 | 0.85 | -569 |

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Table A-6 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2004) (continued)

| Industry Subsector | Establishments | Employment | Average Annual Wage (in dollars) | Location Quotient | Export Employment |
|--|-----------------------|-------------------|---|--------------------------|--------------------------|
| Nonstore Retailers | 129 | 1,410 | 30,204 | 0.80 | -343 |
| Truck Transportation | 306 | 3,032 | 36,773 | 0.54 | -2,546 |
| Transit and Ground Passenger Transport | 54 | 2,156 | 18,034 | 1.35 | 564 |
| Pipeline Transportation | 8 | 28 | 65,796 | 0.17 | -132 |
| Scenic and Sightseeing Transportation | 6 | 22 | 17,757 | 0.20 | -87 |
| Support Activities for Transportation | 66 | 780 | 33,324 | 0.35 | -1,431 |
| Couriers and Messengers | 50 | 1,330 | 34,195 | 0.57 | -983 |
| Warehousing and Storage | 48 | 1,240 | 29,122 | 0.54 | -1,058 |
| Publishing Industries | 105 | 3,469 | 39,309 | 0.92 | -289 |
| Motion Picture & Sound Recording | 59 | 694 | 15,485 | 0.43 | -912 |
| Broadcasting (except Internet) | 21 | 898 | 41,478 | 0.67 | -451 |
| Internet Publishing and Broadcasting | 7 | 388 | 55,532 | 3.00 | 259 |
| Telecommunications | 116 | 5,721 | 61,941 | 1.33 | 1,415 |
| ISPs, Search Portals, & Data Processing | 84 | 931 | 59,904 | 0.58 | -673 |
| Other Information Services | 43 | 286 | 14,497 | 1.36 | 76 |
| Credit Intermediation & Related Activity | 479 | 7,752 | 48,662 | 0.66 | -3,950 |
| Financial Investment & Related Activity | 224 | 1,529 | 90,520 | 0.48 | -1,638 |
| Insurance Carriers & Related Activities | 777 | 6,127 | 48,191 | 0.66 | -3,208 |
| Funds, Trusts & Other Financial Vehicles | 10 | 76 | 47,995 | 0.22 | -274 |
| Real Estate | 780 | 5,412 | 27,055 | 0.92 | -440 |
| Rental and Leasing Services | 233 | 2,169 | 27,102 | 0.82 | -492 |
| Professional and Technical Services | 2,599 | 23,555 | 46,622 | 0.84 | -4,373 |
| Management of Companies and Enterprises | 157 | 10,628 | 72,799 | 1.50 | 3,530 |
| Administrative and Support Services | 1,162 | 22,426 | 24,702 | 0.71 | -8,996 |
| Waste Management and Remediation Service | 75 | 1,311 | 44,196 | 0.98 | -33 |
| Educational Services | 309 | 22,285 | 42,786 | 1.95 | 10,858 |
| Ambulatory Health Care Services | 1,583 | 18,422 | 37,048 | 0.90 | -2,014 |
| Hospitals | 16 | 22,911 | 35,350 | 1.29 | 5,173 |
| Nursing and Residential Care Facilities | 310 | 17,209 | 21,874 | 1.48 | 5,580 |
| Social Assistance | 636 | 11,815 | 20,545 | 1.34 | 3,010 |
| Performing Arts and Spectator Sports | 114 | 1,329 | 21,893 | 0.88 | -174 |
| Museums, Parks and Historical Sites | 22 | 668 | 19,104 | 1.38 | 184 |
| Amusement, Gambling & Recreation | 343 | 6,101 | 14,041 | 1.09 | 521 |
| Accommodation | 158 | 3,707 | 17,037 | 0.50 | -3,718 |
| Food Services and Drinking Places | 2,077 | 31,794 | 11,407 | 0.87 | -4,774 |
| Repair and Maintenance | 835 | 4,520 | 27,365 | 0.89 | -552 |
| Personal and Laundry Services | 691 | 4,681 | 17,835 | 0.89 | -582 |
| Membership Organizations & Associations | 917 | 8,377 | 17,255 | 0.69 | -3,724 |
| Private Households | 366 | 586 | 15,299 | 0.28 | -1,491 |
| Federal Government | 207 | 5,617 | 48,738 | 0.50 | -5,654 |
| State Government | 95 | 14,412 | 48,606 | 0.70 | -6,181 |
| Local Government | 629 | 69,562 | 34,778 | 1.21 | 12,106 |
| Unclassified | 998 | 1,021 | 20,735 | 1.03 | 33 |
| Total, All Industries | 28,202 | 543,158 | 36,306 | | -5,185 |
| Total, All Private | 27,271 | 453,567 | 35,995 | | -5,457 |

Source: Quarterly Census of Employment and Wages

Prepared by Genesee/Finger Lakes Regional Planning Council

Appendix 7 - Economic Indicators for the G-FL Region by Industry Subsector (2000)

Table A-7 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2000)

| Industry Subsector | Establishments | Employment | Average Annual Wage (in dollars) ** | Location Quotient | Export Employment |
|---|-----------------------|-------------------|--|--------------------------|--------------------------|
| Crop Production | 267 | 2,944 | 19,837 | 1.23 | 541 |
| Animal Production | 147 | 1,934 | 23,994 | 2.24 | 1,071 |
| Forestry and Logging | 5 | 68 | 30,524 | 0.21 | -262 |
| Agriculture & Forestry Support Activity | 41 | 557 | 21,793 | 0.41 | -791 |
| Oil and Gas Extraction | 3 | 16 | 50,193 | 0.03 | -517 |
| Mining (except Oil and Gas) | 44 | 404 | 42,003 | 0.42 | -554 |
| Utilities | 16 | 2,483 | 75,377 | 0.97 | -81 |
| Construction of Buildings | 761 | 4,947 | 40,523 | 0.71 | -2,016 |
| Heavy and Civil Engineering Construction | 127 | 1,993 | 48,009 | 0.46 | -2,340 |
| Specialty Trade Contractors | 1,792 | 13,049 | 39,072 | 0.73 | -4,933 |
| Food Manufacturing | 121 | 6,214 | 34,744 | 0.94 | -409 |
| Beverage & Tobacco Product Manufacturing | 22 | 1,685 | 49,992 | 1.91 | 802 |
| Textile Mills | 7 | 282 | 45,750 | 0.17 | -1,332 |
| Textile Product Mills | 17 | 328 | 26,886 | 0.36 | -595 |
| Apparel Manufacturing | 16 | 1,032 | 28,758 | 0.49 | -1,087 |
| Wood Product Manufacturing | 56 | 837 | 26,453 | 0.32 | -1,777 |
| Paper Manufacturing | 43 | 2,265 | 37,833 | 0.88 | -314 |
| Printing and Related Support Activities | 170 | 3,468 | 40,395 | 1.01 | 28 |
| Petroleum & Coal Products Manufacturing | 22 | 173 | 52,725 | 0.33 | -352 |
| Chemical Manufacturing | 51 | 24,344 | 63,172 | 5.82 | 20,164 |
| Plastics & Rubber Products Manufacturing | 104 | 7,346 | 35,704 | 1.81 | 3,287 |
| Nonmetallic Mineral Product Manufacturing | 67 | 2,329 | 42,026 | 0.99 | -34 |
| Primary Metal Manufacturing | 11 | 525 | 46,271 | 0.20 | -2,127 |
| Fabricated Metal Product Manufacturing | 340 | 11,100 | 38,610 | 1.49 | 3,626 |
| Machinery Manufacturing | 330 | 22,446 | 59,750 | 3.62 | 16,242 |
| Computer and Electronic Product Manufacturing | 107 | 9,912 | 58,966 | 1.28 | 2,151 |
| Electrical Equipment and Appliances | 25 | 1,749 | 38,365 | 0.69 | -771 |
| Transportation Equipment Manufacturing | 31 | 7,817 | 56,884 | 0.89 | -948 |
| Furniture and Related Product Manufacturing | 60 | 772 | 30,636 | 0.27 | -2,127 |
| Miscellaneous Manufacturing | 111 | 5,550 | 50,019 | 1.78 | 2,424 |
| Merchant Wholesalers, Durable Goods | 968 | 12,302 | 51,299 | 0.89 | -1,559 |
| Merchant Wholesalers, Nondurable Goods | 352 | 5,391 | 44,901 | 0.61 | -3,411 |
| Electronic Markets and Agents/Brokers | 367 | 1,431 | 58,213 | 0.54 | -1,202 |
| Motor Vehicle and Parts Dealers | 507 | 7,640 | 35,984 | 0.97 | -233 |
| Furniture and Home Furnishings Stores | 206 | 1,845 | 26,703 | 0.80 | -471 |
| Electronics and Appliance Stores | 225 | 1,945 | 35,710 | 0.81 | -461 |
| Building Material & Garden Supply Stores | 345 | 5,406 | 24,400 | 1.11 | 535 |
| Food and Beverage Stores | 594 | 18,309 | 15,029 | 1.43 | 5,548 |
| Health and Personal Care Stores | 283 | 3,630 | 21,147 | 0.92 | -325 |
| Gasoline Stations | 479 | 3,810 | 16,005 | 0.95 | -180 |
| Clothing and Clothing Accessories Stores | 522 | 4,849 | 13,844 | 0.86 | -784 |
| Sporting Goods/Hobby/Book/Music Stores | 254 | 2,877 | 14,036 | 0.99 | -43 |
| General Merchandise Stores | 162 | 9,508 | 16,441 | 0.79 | -2,515 |
| Miscellaneous Store Retailers | 480 | 3,351 | 16,534 | 0.78 | -943 |
| Nonstore Retailers | 128 | 2,406 | 27,874 | 1.14 | 304 |

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Table A-7 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2000) (continued)

| Industry Subsector | Establishments | Employment | Average Annual Wage (in dollars) ** | Location Quotient | Export Employment |
|--|-----------------------|-------------------|--|--------------------------|--------------------------|
| Air Transportation | 13 | 377 | 49,031 | 0.14 | -2,243 |
| Truck Transportation | 331 | 3,186 | 33,938 | 0.53 | -2,807 |
| Transit and Ground Passenger Transport | 53 | 2,291 | 24,314 | 1.44 | 704 |
| Pipeline Transportation | 8 | 40 | 61,191 | 0.20 | -156 |
| Scenic and Sightseeing Transportation | 7 | 35 | 18,987 | 0.30 | -82 |
| Support Activities for Transportation | 66 | 687 | 29,043 | 0.30 | -1,604 |
| Couriers and Messengers | 44 | 2,040 | 28,785 | 0.79 | -544 |
| Warehousing and Storage | 44 | 677 | 30,002 | 0.31 | -1,518 |
| Publishing Industries | 120 | 3,313 | 39,987 | 0.75 | -1,098 |
| Motion Picture & Sound Recording | 69 | 994 | 13,526 | 0.61 | -635 |
| Broadcasting (except Internet) | 25 | 980 | 39,448 | 0.67 | -484 |
| Internet Publishing and Broadcasting | 5 | 90 | 46,796 | 0.42 | -125 |
| Telecommunications | 102 | 5,443 | 78,630 | 1.01 | 61 |
| ISPs, Search Portals, & Data Processing | 95 | 1,823 | 49,633 | 0.84 | -352 |
| Other Information Services | 41 | 293 | 13,488 | 1.49 | 96 |
| Credit Intermediation & Related Activity | 455 | 7,507 | 40,934 | 0.69 | -3,357 |
| Financial Investment & Related Activity | 176 | 1,877 | 101,486 | 0.55 | -1,554 |
| Insurance Carriers & Related Activities | 761 | 5,734 | 45,767 | 0.61 | -3,733 |
| Funds, Trusts & Other Financial Vehicles | 11 | 72 | 44,449 | 0.20 | -289 |
| Real Estate | 748 | 5,333 | 25,552 | 0.95 | -262 |
| Rental and Leasing Services | 220 | 2,190 | 25,319 | 0.77 | -654 |
| Professional and Technical Services | 2,497 | 23,941 | 48,992 | 0.83 | -4,773 |
| Management of Companies and Enterprises | 131 | 10,948 | 67,360 | 1.43 | 3,290 |
| Administrative and Support Services | 1,135 | 25,562 | 22,313 | 0.77 | -7,806 |
| Waste Management and Remediation Service | 70 | 1,223 | 37,929 | 0.92 | -111 |
| Educational Services | 275 | 17,377 | 45,179 | 1.70 | 7,181 |
| Ambulatory Health Care Services | 1,528 | 18,254 | 33,022 | 0.99 | -170 |
| Hospitals | 18 | 23,957 | 32,814 | 1.42 | 7,099 |
| Nursing and Residential Care Facilities | 270 | 14,333 | 22,610 | 1.30 | 3,319 |
| Social Assistance | 612 | 11,409 | 19,455 | 1.44 | 3,477 |
| Performing Arts and Spectator Sports | 125 | 1,108 | 28,074 | 0.68 | -515 |
| Museums, Parks and Historical Sites | 20 | 747 | 18,027 | 1.59 | 276 |
| Amusement, Gambling & Recreation | 319 | 5,292 | 14,543 | 0.96 | -229 |
| Accommodation | 143 | 4,571 | 17,881 | 0.57 | -3,467 |
| Food Services and Drinking Places | 2,135 | 32,571 | 11,529 | 0.93 | -2,343 |
| Repair and Maintenance | 776 | 4,063 | 28,644 | 0.77 | -1,232 |
| Personal and Laundry Services | 684 | 4,292 | 18,203 | 0.81 | -1,009 |
| Membership Organizations & Associations | 803 | 7,095 | 16,759 | 0.62 | -4,346 |
| Private Households | 472 | 760 | 14,272 | 0.41 | -1,089 |
| Federal Government | 191 | 5,463 | 45,448 | 0.45 | -6,753 |
| State Government | 96 | 14,635 | 44,948 | 0.72 | -5,777 |
| Local Government | 574 | 65,766 | 32,068 | 1.17 | 9,749 |
| Unclassified | 157 | 308 | 15,308 | 0.28 | -778 |
| Total, All Industries | 27,211 | 561,926 | 36,001 | | -5,412 |
| Total, All Private | 26,350 | 476,062 | 36,161 | | -2,631 |

*Source: Quarterly Census of Employment and Wages ** Average Annual wage expressed in 2004 dollars*

Prepared by Genesee/Finger Lakes Regional Planning Council

Appendix 8 - Change in Economic Indicators for the G-FL Region by Industry Subsector (2000-2004)

Table A-8 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Subsector (2000-2004)

| Industry | Change in Establishments | | Change in Employment | | Change in Average Annual Wage** | |
|---|--------------------------|---------|----------------------|---------|---------------------------------|---------|
| | Number | Percent | Number | Percent | Dollars | Percent |
| Crop Production | -15 | -5.6 | 362 | 12.3 | -835 | -4.2 |
| Animal Production | 2 | 1.4 | 179 | 9.3 | 2,480 | 10.3 |
| Forestry and Logging | 4 | 80.0 | 0 | 0.0 | -1,233 | -4.0 |
| Agriculture & Forestry Support Activity | -5 | -12.2 | -167 | -30.0 | 3,066 | 14.1 |
| Oil and Gas Extraction | 1 | 33.3 | 1 | 6.3 | -12,570 | -25.0 |
| Mining (except Oil and Gas) | -2 | -4.5 | 192 | 47.5 | 2,611 | 6.2 |
| Utilities | 5 | 31.3 | -338 | -13.6 | 2,955 | 3.9 |
| Construction of Buildings | 21 | 2.8 | 437 | 8.8 | 2,071 | 5.1 |
| Heavy and Civil Engineering Construction | -10 | -7.9 | -265 | -13.3 | 157 | 0.3 |
| Specialty Trade Contractors | -24 | -1.3 | -1,305 | -10.0 | -1,943 | -5.0 |
| Food Manufacturing | 1 | 0.8 | -131 | -2.1 | 1,620 | 4.7 |
| Beverage & Tobacco Product Manufacturing | 10 | 45.5 | 59 | 3.5 | 585 | 1.2 |
| Textile Mills | -1 | -14.3 | -16 | -5.7 | -1,610 | -3.5 |
| Textile Product Mills | -1 | -5.9 | -49 | -14.9 | 1,658 | 6.2 |
| Apparel Manufacturing | 2 | 12.5 | -149 | -14.4 | 1,970 | 6.9 |
| Wood Product Manufacturing | -5 | -8.9 | -107 | -12.8 | 2,962 | 11.2 |
| Paper Manufacturing | -6 | -14.0 | -506 | -22.3 | 3,408 | 9.0 |
| Printing and Related Support Activities | -5 | -2.9 | -338 | -9.7 | -1,604 | -4.0 |
| Petroleum & Coal Products Manufacturing | -15 | -68.2 | -80 | -46.2 | -7,834 | -14.9 |
| Chemical Manufacturing | -15 | -29.4 | -6,899 | -28.3 | 5,869 | 9.3 |
| Plastics & Rubber Products Manufacturing | -17 | -16.3 | -1,436 | -19.5 | 2,330 | 6.5 |
| Nonmetallic Mineral Product Manufacturing | -6 | -9. | -613 | -26.3 | 856 | 2.0 |
| Primary Metal Manufacturing | 2 | 18.2 | -18 | -3.4 | -1,169 | -2.5 |
| Fabricated Metal Product Manufacturing | -17 | -5.0 | -2,024 | -18.2 | 842 | 2.2 |
| Machinery Manufacturing | -17 | -5.2 | -5,432 | -24.2 | 3,187 | 5.3 |
| Computer and Electronic Product Manufacturing | 2 | 1.9 | -2,022 | -20.4 | 882 | 1.5 |
| Electrical Equipment and Appliances | -3 | -12.0 | -273 | -15.6 | 3,298 | 8.6 |
| Transportation Equipment Manufacturing | -1 | -3.2 | -1,762 | -22.5 | -4,134 | -7.3 |
| Furniture and Related Product Manufacturing | -3 | -5.0 | -27 | -3.5 | 1,175 | 3.8 |
| Miscellaneous Manufacturing | -3 | -2.7 | -996 | -17.9 | 4,544 | 9.1 |
| Merchant Wholesalers, Durable Goods | -101 | -10.4 | -1,628 | -13.2 | -865 | -1.7 |
| Merchant Wholesalers, Nondurable Goods | -22 | -6.3 | -126 | -2.3 | 4,249 | 9.5 |
| Electronic Markets and Agents/Brokers | 41 | 11.2 | 578 | 40.4 | -4,441 | -7.6 |
| Motor Vehicle and Parts Dealers | 12 | 2.4 | 261 | 3.4 | 1 | 0.0 |
| Furniture and Home Furnishings Stores | -13 | -6.3 | -20 | -1.1 | -955 | -3.6 |
| Electronics and Appliance Stores | -7 | -3.1 | -3 | -0.2 | -5,238 | -14.7 |
| Building Material & Garden Supply Stores | -8 | -2.3 | 450 | 8.3 | -467 | -1.9 |
| Food and Beverage Stores | -10 | -1.7 | -945 | -5.2 | 924 | 6.1 |
| Health and Personal Care Stores | -11 | -3.9 | -348 | -9.6 | 3,508 | 16.6 |
| Gasoline Stations | -46 | -9.6 | -267 | -7.0 | 349 | 2.2 |
| Clothing and Clothing Accessories Stores | -56 | -10.7 | -268 | -5.5 | 312 | 2.3 |

Table A-8 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Subsector (2000-2004) (continued)

| Industry | Change in Establishments | | Change in Employment | | Change in Average Annual Wage** | |
|--|--------------------------|---------|----------------------|---------|---------------------------------|---------|
| | Number | Percent | Number | Percent | Dollars | Percent |
| Sporting Goods/Hobby/Book/Music Stores | 2 | 0.8 | -158 | -5.5 | 562 | 4.0 |
| General Merchandise Stores | 17 | 10.5 | -55 | -0.6 | -510 | -3.1 |
| Miscellaneous Store Retailers | -51 | -10.6 | -127 | -3.8 | -724 | -4.4 |
| Nonstore Retailers | 1 | 0.8 | -996 | -41.4 | 2,330 | 8.4 |
| Air Transportation | 2 | 15.4 | -90 | -23.9 | -8,219 | -16.8 |
| Truck Transportation | -25 | -7.6 | -154 | -4.8 | 2,835 | 8.4 |
| Transit and Ground Passenger Transport | 1 | 1.9 | -135 | -5.9 | -6,280 | -25.8 |
| Pipeline Transportation | 0 | 0.0 | -12 | -30.0 | 4,606 | 7.5 |
| Scenic and Sightseeing Transportation | -1 | -14.3 | -13 | -37.1 | -1,229 | -6.5 |
| Support Activities for Transportation | 0 | 0.0 | 93 | 13.5 | 4,280 | 14.7 |
| Couriers and Messengers | 6 | 13.6 | -710 | -34.8 | 5,410 | 18.8 |
| Warehousing and Storage | 4 | 9.1 | 563 | 83.2 | -880 | -2.9 |
| Publishing Industries | -15 | -12.5 | 156 | 4.7 | -678 | -1.7 |
| Motion Picture & Sound Recording | -10 | -14.5 | -300 | -30.2 | 1,960 | 14.5 |
| Broadcasting (except Internet) | -4 | -16.0 | -82 | -8.4 | 2,030 | 5.1 |
| Internet Publishing and Broadcasting | 2 | 40.0 | 298 | 331.1 | 8,736 | 18.7 |
| Telecommunications | 14 | 13.7 | 278 | 5.1 | -16,689 | -21.2 |
| ISPs, Search Portals, & Data Processing | -11 | -11.6 | -892 | -48.9 | 10,270 | 20.7 |
| Other Information Services | 2 | 4.9 | -7 | -2.4 | 1,009 | 7.5 |
| Credit Intermediation & Related Activity | 24 | 5.3 | 245 | 3.3 | 7,727 | 18.9 |
| Financial Investment & Related Activity | 48 | 27.3 | -348 | -18.5 | -10,966 | -10.8 |
| Insurance Carriers & Related Activities | 16 | 2.1 | 393 | 6.9 | 2,424 | 5.3 |
| Funds, Trusts & Other Financial Vehicles | -1 | -9.1 | 4 | 5.6 | 3,546 | 8.0 |
| Real Estate | 32 | 4.3 | 79 | 1.5 | 1,503 | 5.9 |
| Rental and Leasing Services | 13 | 5.9 | -21 | -1.0 | 1,783 | 7.0 |
| Professional and Technical Services | 102 | 4.1 | -386 | -1.6 | -2,370 | -4.8 |
| Management of Companies and Enterprises | 26 | 19.8 | -320 | -2.9 | 5,439 | 8.1 |
| Administrative and Support Services | 27 | 2.4 | -3,136 | -12.3 | 2,389 | 10.7 |
| Waste Management and Remediation Service | 5 | 7.1 | 88 | 7.2 | 6,267 | 16.5 |
| Educational Services | 34 | 12.4 | 4,908 | 28.2 | -2,392 | -5.3 |
| Ambulatory Health Care Services | 55 | 3.6 | 168 | 0.9 | 4,026 | 12.2 |
| Hospitals | -2 | -11.1 | -1,046 | -4.4 | 2,536 | 7.7 |
| Nursing and Residential Care Facilities | 40 | 14.8 | 2,876 | 20.1 | -737 | -3.3 |
| Social Assistance | 24 | 3.9 | 406 | 3.6 | 1,090 | 5.6 |
| Performing Arts and Spectator Sports | -11 | -8.8 | 221 | 19.9 | -6,182 | -22.0 |
| Museums, Parks and Historical Sites | 2 | 10.0 | -79 | -10.6 | 1,076 | 6.0 |
| Amusement, Gambling & Recreation | 24 | 7.5 | 809 | 15.3 | -501 | -3.4 |
| Accommodation | 15 | 10.5 | -864 | -18.9 | -844 | -4.7 |
| Food Services and Drinking Places | -58 | -2.7 | -777 | -2.4 | -122 | -1.1 |
| Repair and Maintenance | 59 | 7.6 | 457 | 11.2 | -1,279 | -4.5 |
| Personal and Laundry Services | 7 | 1.0 | 389 | 9.1 | -367 | -2.0 |

Table A-8 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Subsector (2000-2004) (continued)

| Industry | Change in Establishments | | Change in Employment | | Change in Average Annual Wage** | |
|---|---------------------------------|----------------|-----------------------------|----------------|--|----------------|
| | Number | Percent | Number | Percent | Dollars | Percent |
| Membership Organizations & Associations | 114 | 14.2 | 1,282 | 18.1 | 497 | 3.0 |
| Private Households | -106 | -22.5 | -174 | -22.9 | 1,027 | 7.2 |
| Federal Government | 16 | 8.4 | 154 | 2.8 | 3,290 | 7.2 |
| State Government | -1 | -1.0 | -223 | -1.5 | 3,657 | 8.1 |
| Local Government | 55 | 9.6 | 3,796 | 5.8 | 2,711 | 8.5 |
| Unclassified | 841 | 535.7 | 713 | 231.5 | 5,428 | 35.5 |
| Total, All Industries | 991 | 3.6 | -18,768 | -3.3 | 305 | 0.8 |
| Total, All Private | 921 | 3.5 | -22,495 | -4.7 | -166 | -0.5 |

Source: Quarterly Census of Employment and Wages

*** Average Annual wage expressed in 2004 dollars*

Appendix 9 - Assumptions in Location Quotient Approach

The first is the assumption that there is no cross hauling. The assumption is that a community will first use a product from the local economy and then export the rest. The community will not import a product that they produce for export. This is not true because a local economy may import a different brand of product or may import a product that is within the same industry for which they export. The problem with the assumption gets larger when there is greater product mix and the industries are aggregated and not well refined. The second assumption is that the national economy is self-sufficient and that the nation does not import or export items outside the nation's boundaries. This is problematic because the world is becoming increasingly global and the United States is a major trade partner with several other countries. The third assumption is that there is an equal amount of productivity across regions. This assumption can only be made if it is known that the rate of productivity is equal for one region compared to another. This is a problem related to using employment as a measure because it accounts only for the number of workers and not their efficiency. The last assumption made when using the location quotient approach is regions have equal consumption patterns. One region may have a need or preference for a product and that will effect the consumption of the product for the area and, in turn, may affect the location quotient. This can be adjusted for by taking into account income share. Although there are flaws with this method, the location quotient does serve as an indicator of an industry compared to other places in the United States and can be an effective tool in measuring the strength of a regional economy.

Appendix 10 - Stakeholder Input Session Attendees


| Table A-10 - Comprehensive Economic Development Strategy (CEDS) Stakeholder Input Sessions Attendee List | | | |
|---|--|---|--|
| Name | Organization and/or Affiliation | Mailing Address | E-mail Address |
| David Woods | Livingston County Planning Department | 6 Court Street, Room 305 Geneseo, NY 14454 | dwoods@co.livingston.ny.us |
| Bill Graff | Rochester Business Alliance | 150 State Street Rochester, NY 14614 | bill.graff@rballiance.com |
| Nora Keane-Yancey | Honorable Jim Walsh | 1180 Canandaigua Road Palmyra, NY 14522 | nora.yancey@mail.house.gov |
| David Frohlich | Williamson/ Wayne County Economic Development | PO Box 229 Putneyville, NY 14538 | dfrohlich@rochester.rr.com |
| Jim Senall | Greater Rochester Enterprise | 100 Chestnut Street Rochester, NY 14614 | james@greaterrochesterenterprise.com |
| Paul Johnson | Monroe County Planning and Development | 50 West Main Street, Suite 8100 Rochester, NY 14614 | pjohnson@monroe.county.gov |
| Richard Perrin | Genesee Transportation Council | 50 West Main Street, Suite 8112 Rochester, NY 14614 | rperrin@gtcmppo.org |
| Jack Kinnicutt | Empire State Development | 400 Andrews Street, Suite 710 Rochester, NY 14604 | jkinnicutt@empire.state.ny.us |
| Jermomy Rogers | Chili | 67 Marion Street Rochester, NY 14610 | jrogers@townofchili.org |
| Paul Morrell | City of Rochester | 30 Church Street Rochester, NY 14614 | morrellp@cityofrochester.gov |
| Mary Pat Hancock | Genesee County Legislature | Old Court House 7 Main Street Batavia, NY 14020 | mhancock@co.genesee.ny.us |
| Wilfred Brooks | Genesee/Finger Lakes Regional Planning Council | 98 South Pearl Street Oakfield, NY 14175 | |
| Jerry L. Davis | Wyoming County Board of Supervisors | Box 445 Pavilion, NY 14525 | jarvis85@hotmail.com |
| Esther Leadley | Genesee County Legislature | 11047 River Road Pavilion, NY 14525 | eleadley@frontiernet.net |
| Steve Hyde | Genesee County Economic Development Center | 1 Mill Street Batavia, NY 14020 | shyde@gcedc.org |
| Jay Gsell | Genesee County | 7 Main Street Batavia, NY 14020 | jgsell@genesee.ny.us |
| Felipe Oltemari | Genesee County Planning | 3837 West Main Street Batavia, NY 14020 | foltemari@co.genesee.ny.us |
| Beverly Mancuso | Cornell Cooperative Extension, Genesee County | 420 East Main Street Batavia, NY 14020 | blm34@cornell.edu |
| Mary Lou Hamm | GLOW WIB | 587 East Main Street Batavia, NY 14020 | mlhamm@co.genesee.ny.us |
| Lynn Freeman | Genesee County Chamber of Commerce | 210 Main Street Batavia, NY 14020 | lfreeman@geneseenyc.com |

**Table A-10 - Comprehensive Economic Development Strategy (CEDS)
Stakeholder Input Sessions
Attendee List (continued)**

| Name | Organization and/or Affiliation | Mailing Address | E-mail Address |
|--------------------|--|--|--|
| James Duval | Genesee County Planning Department | 3837 West Main Street Batavia, NY 14020 | jduval@co.genesee.ny.us |
| Chris Wilson | Yates County Planning | 417 Liberty Road Penn Yan, NY 14527 | cwilson@yatescounty.org |
| Rob Gladden | Geneva Chamber of Commerce | PO Box 587 Geneva, NY 14456 | rgladden@genevany.com |
| Sue Schmidt | Finger Lakes Visitors Connection | 25 Gorham Street Canandaigua, NY 14424 | sue@visitfingerlakes.com |
| Krys Cail | Cornell Cooperative Extension of Ontario County | 480 North Main Street Canandaigua, NY 14424 | klc32@cornell.edu |
| Roberta Hutchinson | Ontario County IDA/OED | 20 Ontario Street Canandaigua, NY 14424 | roberta.hutchinson@co.ontario.ny.us |
| Jim Hoffman | Wayne County Legislature | 6380 Route 21 Williamson, NY 14451 | wmscusupv@rochester.rr.com |
| Steven Leroy | Wayne County | 6801 North Geneva Road Sodus, NY 14451 | smleroy@rochester.rr.com |
| Kal Wysokowski | Fairport IDA | 31 South Main Street Fairport, NY 14450 | kalzone9@mail.com |

Appendix 11 – CEDS Stakeholder Input Meeting Presentation

Comprehensive Economic Development Strategy (CEDS)




Stakeholder Input Session

Rochester, NY ~ March 28, 2006



Agenda

- Genesee/Finger Lakes Regional Planning Council (G/FLRPC)
- Comprehensive Economic Development Strategy
- Role of the stakeholder
- Snapshot of the region
- Developing a vision
 - Analysis, setting goals and evaluation
- Questions/ Next Steps




G/FLRPC


- Established 1977
- Members
- Several functions
 - Economic Development District
- Funding/ Support



CEDS



- Regional guide
 - Purpose is to create jobs, foster a stable and diversified economy and improve quality of life
- Coordination of economic development efforts and resources at a regional level
- Identification of funding priorities





Role of Stakeholders

- Identify strengths, weaknesses, opportunities and threats to the region
- Create a vision for the region
 - Set regional goals
 - Implementation strategies
- Help G/FLRPC create a work program



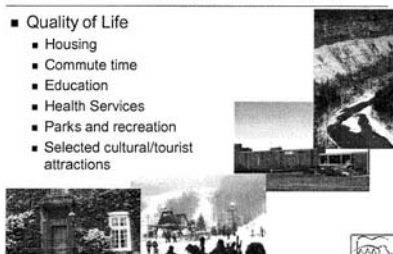

Snapshot of the Region

- Population
- Age
- Income and Poverty
- Land use
- Infrastructure



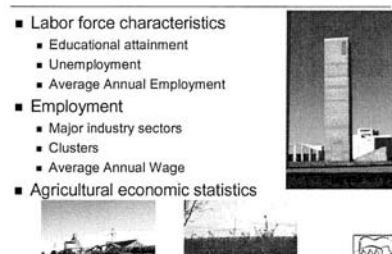

Snapshot of the Region (continued)

- **Quality of Life**
 - Housing
 - Commute time
 - Education
 - Health Services
 - Parks and recreation
 - Selected cultural/tourist attractions

Snapshot of the Region (continued)

- **Labor force characteristics**
 - Educational attainment
 - Unemployment
 - Average Annual Employment
- **Employment**
 - Major industry sectors
 - Clusters
 - Average Annual Wage
- **Agricultural economic statistics**

Developing a Vision: Analysis

- **The state of the regional economy**
 - Strengths and weaknesses
 - Growth sectors and clusters
 - What is driving the economy? Where is it headed?
- **External trends and forces**
 - Opportunities and threats
 - How is the region positioned nationally and globally?
- **Partners and resources**
 - Who are the important actors in the region?
 - Who can provide resources?






Developing a Vision: Setting Goals

- **Where do we want to be in the future?**
 - 10 years?
 - 20 years?
- **What are the areas in which we can build a competitive advantage?**
- **What are the goals?**
 - Goals from 2004-2005 CEDS
- **What strategies can be employed to reach goals?**
- **How should we measure how we are doing?**



Next Steps

- April 2006: Submit draft for stakeholder feedback
- May 2006: Integrate feedback and comments
- June 2006: Submit report to G/FLRPC for review and approval
- July 2006: Submit to EDA

Appendix 12 – CEDS Stakeholder Input Meeting Notes

What is our Vision for the region?

What are the strengths/opportunities within region?

- Educated and skilled workforce
- Productive, dependable workforce
- Transition of older skilled workforce into new jobs
- CNC training
- Bright, educated people interested in working in the public sector
- Good workforce programs that will do customized training for emerging fields and companies
- Strong academic institutions
- Community colleges are integral part of training for the strong workforce
 - Provide technology and infrastructure backbone
 - Provide monetary and other resources
- Quality of life factors
- Low cost of housing and real estate
- Benefits of a medium sized city (less traffic, cultural institutions, etc...)
- Low commuter rate with some of the lowest commute times
- Inexpensive place to live
- Variety of cultural institutions
- Desirable ambiance created by agriculture; scenic beauty
- Tourism
 - Gains in capital and revenue for tourism
 - Growth opportunities in tourism
 - Finger Lakes Scenic Railroad
 - Strong boating industry; charter and fishing
 - Erie Canalway Heritage Corridor
 - Good hunting and fishing
 - Mormons bring a lot of tourism
 - Culinary tourism
 - Artisan foods are high-value added
 - Spa tourism
 - Strong arts and culture
 - Ease of air travel
- Establishment of the NY Wine and Culinary Center
- Innovation is historically rooted here with continued success in developing new technology and being awarded patents
- Good cooperation with the Centers of Excellence (Infotonics and at UB) with the tech transfer component
- Technology is well-funded
 - EDA funding
 - NSF Knowledge Fusion grant
 - USDOL ETA WIRED grant

- Prime location with easy access to national markets
- Precision manufacturing firms and workforce here is very strong
- Strength in several clusters
 - Precision manufacturing
 - Optics & Imaging
 - Biotech & Life Sciences
 - Food & Agriculture
 - Alternative Energy
- Manufacturing that focuses on customization of products and services and/or technology centered manufacturing very competitive
 - Region can compete globally in this manufacturing sector because competing on the skilled workforce and not solely the cost of production
 - Small scale production because of skilled workforce
- Productive agricultural base and soils
- Strength in agriculture gives the region the ability to shift from food production to energy production
- The agriculture industry has a long history of moving technology into action/practice rapidly
- Opportunity to further develop the dairy industry in the region
- Opportunity to grow alternative fuels industry
- Self-sufficient in food growth and production
- Progressing nicely toward economic self-sufficiency
- Transportation resources; good transportation network
- Good infrastructure, including the interstate and airports and utilities
 - Opportunity to extend for further development
- Good investments have been made in infrastructure
- Recent telecommunications improvements
- Aging housing stock so an opportunity for new construction
- Availability of fresh water
- Agricultural industry has the ability to stabilize land use patterns
- Existing spirit of cooperation
- Self-determined and action-oriented community
- Strong spirit of coordination in specific communities and region-wide
 - Exists in WIB system, health care and acute care facilities, youth development programs, etc...
- Entrepreneurial spirit; lots of sole proprietorships
- Mennonite community
 - Good at selling themselves
 - Will double in the next 10 years

What are the weaknesses/threats with region?

- High cost of doing business
 - Taxes and regulations
 - High cost of unemployment and worker's compensation
 - High costs to develop new infrastructure (get rid of WICS law)

- High energy costs makes it hard to retention and expansion of firms
- Government Structure/ Big Government
 - Lack of inter-municipal cost share
 - Too many service providers/ repetition of services
 - Hard to understand how the government works which leads to a disinterested public
- Parochialism
- The definition of the EDD is too narrow; it should include a larger region
- Lack of political infrastructure to coordinate in a regional way
 - Jurisdictions are limiting
 - Regions are defined in many ways by different agencies; some include certain counties while others do not
- Every county in the region does not have an Empire Zone
- School financing makes property taxes very high – need to more creatively finance schools
- Lack of skilled workforce
 - Much of the workforce is close to retirement
 - Decrease in worker productivity
 - People coming out of high school lack the skills to enter the workforce (especially in manufacturing)
 - Reliance on the Big 3 for workforce development has meant that with the decline of the Big 3 there has also been a decline in workforce training and development
 - Skilled workforce decreasing as it migrates out
 - High school counselors prepare students for 4 year education and not technology skills
 - Lack of necessary science/math degrees
 - Lack of necessary workforce in the agricultural industry
 - Hard to find replacement of workers in the agricultural industry
 - Dependent on foreign labor/illegal immigrants for agriculture
 - Almost at full employment so possible worker shortage
- WIB funding has been cut
- Since there is 1 training center per sub-region it is hard for some people to travel to them
- Lack of teaching corp – the depth of the educational workforce is being threatened
- Loss of 18-34 age cohort
- Complacency about the state of the economy
- Lack of lifestyle attractions and services (retail and entertainment)
 - Employers attracted to the region what will their employees do
- Perception of all of Upstate (anything outside of the NYC metro) being the same
- Idea that state aid either goes downstate or Upstate and doesn't take into account the different needs of Upstate communities and regions
- Image of Appalachia gives us a bad rep
- Media is not positive or cooperative
 - Hard to get coverage outside of metro areas

- Little coverage of business
 - All negative
- Stratification of classes; lower class prevalent
- Identity issues
 - Rural counties are still rural but close to Rochester
 - We were an industrial based economy. What are we now?
 - What is our niche with increased outsourcing
- Weather
- Lack of capital
 - Lot of debt-based financing programs for small businesses
 - Need equity investors for small business
 - In the pre-seed and seed stage of investment
- Lack of venture capital for start-ups
- IT/Broadband/ Wireless Service
 - Infrastructure is not at the place it needs to be to effectively compete
 - Debate over public vs. private ownership structure has led to standstill
- Lack of investment in infrastructure to glue firms and products here
- Old infrastructure, especially wastewater
- The practice of selling our water to other places
- Traffic and transportation issues (congestion) as the periphery is expanded
- Water quality is threatened
- Lack of adequate land use planning; lots of variability between municipalities
- High cost of maintaining already built infrastructure
- Global marketplace
 - Increase in global productivity has lead to a decline in the region
- Little farms getting pushed out by larger corporate farms
- Medium sized farms (200-300 workers) squeezed from agriculture industry by cost of productivity and inputs
- Need a processing plant for dairy which takes into account public health and safety
- Agriculture always in danger because agriculture industry does not get a lot of benefits
- Older farmers are selling land and there are no other options in NYS to keep land for agricultural purposes
- Farm vs. non-farm conflict
- Aging housing stock has left a void in the middle class housing stock
- Mennonites cause traffic problems
- Lack of communication between different county and municipal departments

What are the growth sectors and clusters in the region?

- Optics & Imaging
- Biotech & Life Sciences
- Food & Agriculture
- Alternative Energy
- Agri-tourism
- Education

Who are the major actors in the region? Who can provide resources?

- Regional director for Empire State Development
- County executives
- Mayors
- Senior executives of major employers in the region
- County IDA and other development organizations
- College presidents, including community colleges'
- Rochester Business Alliance
- Greater Rochester Enterprise
- Public authorities/ utilities
- Innovation-based organizations (e.g. Excell Partners, Infotonics, etc...)
- Workforce Investment Boards
- Chambers of Commerce
- Inter-county agencies
- Planning departments
- Highway departments
- Federal government agencies (HUD, DOL)
- US Rural Development Authority
- State and federal legislative representatives
- Media
- Community members – they create a necessary attitude
- Tourism agencies
- Agricultural community
- Private sector
 - They provide a point of contact for people looking to relocate
- Non-profits
- Genesee Transportation Council
- Educational institutions
- BOCES
- Philanthropists

How can we build a competitive advantage in the region?

- Exploit clusters
- Develop strong technology commercialization and transfer systems
- Bring innovation and ideas to sale on the market through technology transfer and commercialization
- Strengthen food processing and manufacturing
- Promote and develop agri-tourism
- Connect medicine and high-technology (telemedicine) and bring that technology to the marketplace
- Continue to diversify and strengthen the tourism industry
 - Broaden the tourism marketing and strategy to include the Region as a place that people visit while seeing Niagara Falls

- Build high market value industries where high-skill and high wages are a factor in development
- Capitalize on the growing alternative energy industry

What would you like to see in the future for the region?

- Job opportunities for young people
- Increase in population, especially the 18-34 age cohort
- Zero loss of the 18-34 age cohort with eventual gains
- Create more option for people to stay in the community
- Capitalize on growth sectors; exploit clusters
- Commercialization of technology with products and jobs that stay in the region as the outcome
- The region is a recognized hub of innovation and technology-based development
- Companies developed through incubators where they create jobs and remain in the region
- Exploit current resources to gain competitive advantage and market share in wind energy and bio-diesel
- Develop a method to site alternative energy sites (e.g. wind farms and biodiesel production facilities) to curb NIMBYism
- Greater self-sufficiency in energy
 - Be on the plus side of the grid
- Lower energy costs
- Increase diversification of industries and manufacturing
- Retain identity as an agricultural community
- Increased regional coordination; no county will be successful alone
 - Eliminate competition between counties in the region
- Supportive of micro-enterprise
- Lower property taxes and find another way to support government
- Regional center of culture and innovation
- Build on quality of life, especially lakes and the waterfront
 - Be careful in the exploitation of recreational assets, especially water, to not destroy them
- Make the Finger Lakes a destination place
- Utilize historic structures through reuse
- Become a region of learning where exchange of ideas flows easily
- Increase racial, cultural, economic diversity in the region
- Increase speed in reinventing ourselves
- The concept of failure becomes an acceptable element of success
- Exploit the region's position in the "new" ruralism movement
- Become more welcoming of "outsiders" – people who move to the region

What are the goals for the region? Reflections on the 2003-2004 goals?

- Assist in the retention and expansion of existing industries in the District.
 - Should focus on retaining firms and not necessarily just look at employment and jobs added

- Must look at investment and rate of return from firms and not just employment
 - Lower energy costs
- Assist in the attraction of industries and firms to the District.
 - Should focus on attracting firms in the Region's core/ clusters
 - Retain/expand/grow clusters
 - Track clusters and sectors
 - Focus on high-value added industries and clusters
- Assist in the upgrading of the skills of the District's workforce.
 - Community colleges become more active in workforce training
 - Work with the goals of the WIRED grant
 - Better K-12 education that trains workers for technology careers
 - Have school counselors track students into community colleges and Associate programs instead of 4-year liberal arts degrees
- Encourage small business development and entrepreneurship
 - Greater commercialization of innovation technology
 - Create a small business investment fund so small business owners are not so debt ridden
 - Develop entrepreneurship networks
- Strengthen capacity of counties and local governments to undertake economic development activities that encourage efficient land use and development patterns
 - Important component of maintaining quality of life
 - Increase number of comprehensive plans and zoning regulations
 - Increase design capacity
- Enhance existing tourism opportunities and develop new recreation destinations and facilities
 - Use current momentum and resources in the development of the Erie Canal
 - Better market the tourism offerings
 - Enhance the reception of locals to visitors from outside the region
 - Lobby for more money from the I LOVE NY program
- Strengthen regional coordination
 - Greater marketing and promotion of the region
- Strengthen agriculture and agri-business
 - Re-establish the meat industry
- Work with local governments to improve the infrastructure of the District
 - Provide affordable financing (appropriate interest and length of loans) for infrastructure improvements
 - Decrease the number of public sector entities and share costs of services between municipalities

How are we doing?

- Greater cooperation and coordination throughout the region.
- Working together more towards regional goals than just county-wide ones.
- More effective at coordinating resources and different funding sources than in the past.

- Parochialism is a negative fixture of the region and impedes getting things done.
- Not doing enough to share services and decrease administrative costs

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How do we measure performance?

- Number of patents that are commercialized
- Jobs that stay in the region from technology commercialization
- Growth in productivity and not just employment
- Population
- Youth cohort; reduction of median age
- Amount of capital investment
- Acres of farmland
- Increase in numbers of private sector employment; reductions in public sector employment
- Volume of projects
- Decrease in the percent of people living in poverty, especially children
- Number of visitors/tourists
- Average annual wage and per capita income
- Increased number of large (mega) deals
- Amount of federal funds into the region
- Positive vs. negative news stories in media
- Amount of new money invested in business start-ups
- Number of new start-ups in the region
- Length of retention of start-ups
- The number of national conferences held in the region

County/Community Specific comments:

- Genesee County has a good comprehensive plan with a strong vision/strategy
- Genesee County has access to both Rochester and Buffalo airports
- Genesee County has access to both Rochester and Buffalo markets and resources
- Community college (in Genesee County) expanding nursing programs but still a demand for them
 - Wage equalization funding for nursing in some counties and the possibility of it in more
- Orleans County and part of Genesee County are located in NIPA
- Ontario County has Infotonics and the Cornell Technology Farm