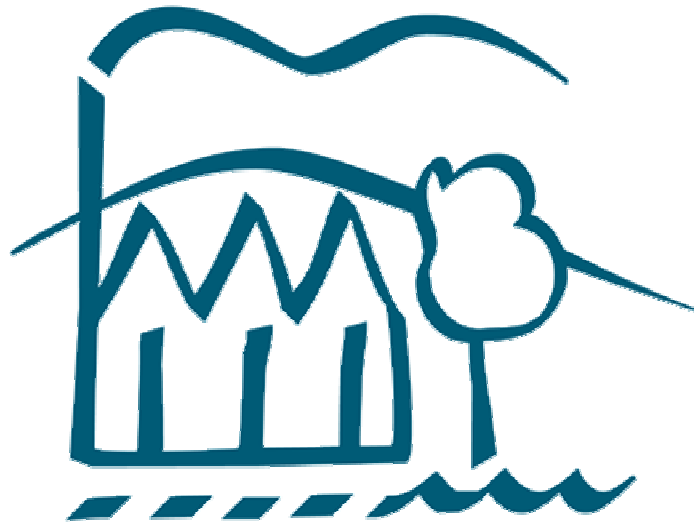

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update

2007



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 Update**

2007

Prepared by the
Genesee/Finger Lakes Regional Planning Council
City Place
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Rochester, New York 14614

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Contract Grant Project Number: 01-83-08428

RESOLUTION NO. 2007-5

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 14, 2007
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 a subsequent section 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.

2007 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>
Brenda Donohue (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>Judy Seil</i>	<i>Monroe County</i>	<i>Non-voting</i>	<i>White</i>	<i>Female</i>
Robert Duffy	City of Rochester	Ex-officio	White	Male
Lois Geiss	City of Rochester	Ex-officio	White	Female
Charles Thomas (A)	City of Rochester	Voting	White	Male
<i>Carlos Carballada</i>	<i>City of Rochester</i>	<i>Non-voting</i>	<i>White</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
Lloyd Kinnear	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	Orleans County	Voting	White	Male
David Cowllard (A)	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	Seneca County	Voting	White	Female
Edward Barto	Seneca County	Ex-officio	White	Male
William Bordeaux	Seneca County	Non-voting	White	Male
Pat Jones	Seneca County	Non-voting	White	Female
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
Joe Gozelski	Wyoming County	Voting	White	Male
Ron Smith (A)	Wyoming County	Voting	White	Male
<i>Michael Hefika</i>	<i>Wyoming County</i>	<i>Non-voting</i>	<i>White</i>	<i>Male</i>
Jerry Davis (A)	Wyoming County	Non-voting	White	Male
Donald House (A)	Yates County	Voting	White	Male
Robert Multer	Yates County	Ex-officio	White	Male
Nancy Taylor	Yates County	Voting	White	Female
<i>Steve Griffin</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
<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, along with the regular meetings of the Planning Coordinating Committee (PCC), the Economic Development Advisory Committee (EDAC) and the Rochester/Finger Lakes Development Corporation (RDC). Each of the CEDS Review Committee members was invited to the Stakeholder Input sessions held on March 28, 29 and 30, 2006 through a mailing that went to their home and/or office and with a personal invitation at the March Regional Planning Council/ CEDS Review Committee meeting. A copy of the invitation that was distributed to the CEDS Review Committee members can be found in Appendix 1. In early May 2006, 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, two 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/ CEDS Review Committee meeting in June with the assistance of a summary document which can be found in Appendix 2.

The EDAC and RDC serve as the CEDS Review Sub-committee. The CEDS was discussed at the March 9, 2006 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 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 CEDS/WIRED meeting was held for the WIRED Economic Development Implementation Team to discuss what regional projects would be of top priority.

At the January 26, 2007 EDAC/RDC meeting, G/FLRPC staff met with the CEDS subcommittee and gave a brief overview of the CEDS and the updating process. The minutes from the January EDAC/RDC meeting are included in Appendix 4 of this document. G/FLRPC staff additionally met with a sub-section of the CEDS subcommittee to review comments and priorities for the CEDS update. A list of the organizations that were met with and the dates of those meetings can be found in Appendix 5. G/FLRPC staff also provided feedback and revisions for the CEDS update.

In addition to meeting with CEDS stakeholders, G/FLRPC staff made a presentation on the CEDS process and its relation to the WIRED initiative to the Finger Lakes Wired Governing Board on January 22, 2007 and provided opportunity for feedback on the process from the Governing Board.

A draft version of the 2007 CEDS was presented to the CEDS subcommittee and the G/FLRPC Executive Committee for review and comments in April. After incorporating their feedback into the CEDS, a draft final version of the document was provided to the CEDS subcommittee in May for additional review. A final version of the 2007 CEDS was adopted at the June 14 G/FLRPC Governing Board meeting; the minutes from this meeting can be found in Appendix 3 of this document.

2.3.b Executive Committee

The Executive Committee 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
Brenda Donohue	6 Court Street Geneseo, NY 14454	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
George Bower	16567 Holley Road Holley, NY 14470	Chair, Orleans County Legislature	White	Male
Edward Barto	1 DiPronio Drive Waterloo, NY 13165	Seneca County Board of Supervisors	White	Male
James Hoffman, Vice Chair	26 Church Street Lyons, NY 14489	Chairman, Wayne County Board of Supervisors	White	Male
Jerry Davis	7414 Court Road Pavilion, NY 14525	Supervisor, Town of Covington	White	Male
Donald House	Yates County Legislature Penn Yan, NY 14527	Legislator, Yates County Legislature	White	Male
Wilfred Brooks	98 South Pearl Street Oakfield, NY 14125	At-Large	Black	Male
Steven Griffin	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 PCC	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
Judy Seil, Acting 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
William Bordeau, Deputy Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Planning & Development	White	Male
Margaret Churchill, Executive Director	16 William Street Lyons, NY 14489	Wayne Economic Development	White	Female
Michael Heftka, IDA Director	6470 Route 20A Suite 4 Perry, NY 14530	Wyoming County Industrial Development Agency	White	Male
Steven Griffin, 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
Judy Seil, Acting Director	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, Executive Director	1 Keuka Business Park Penn Yan, NY 14527	Yates County Industrial Development Agency	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

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 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
Charles Thomas, Director of Planning	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
Harriet Haynes, Planner	1 DiPronio Drive Waterloo, NY 13165	Seneca County Planning & Development	White	Female
Sharon Lilla, Director	9 Pearl Street Lyons, NY 14489	Wayne County Planning Department	White	Female
Director	6470 State Route 20A, Suite 4 Perry, NY 14530	Wyoming County Department of Planning & Development	-	-
Planner	417 Liberty Street Penn Yan, NY 14527	Yates County Department of Planning	-	-
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
Joseph Bovenzi	Senior Planner	White	Male
Jayne Breschard	Planner	White	Female
Daniel Burton	Senior Planner - Economic Development & RLF Coordinator	White	Male
Thomas Kicior	Planner	White	Male
Brian Slack	Senior Planner	White	Male
Chris Tortora	Planner - GIS & Remote Sensing, Data, Technology & Resource Center	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 Finger Lakes Energy Smart Communities

The Finger Lakes Energy Smart program was developed by the New York State Energy Research and Development Authority and was managed by G/FLRPC in the region until April 2007. 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 and Water Resources Planning

Regional, Local and 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.

2.3.g.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 and 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

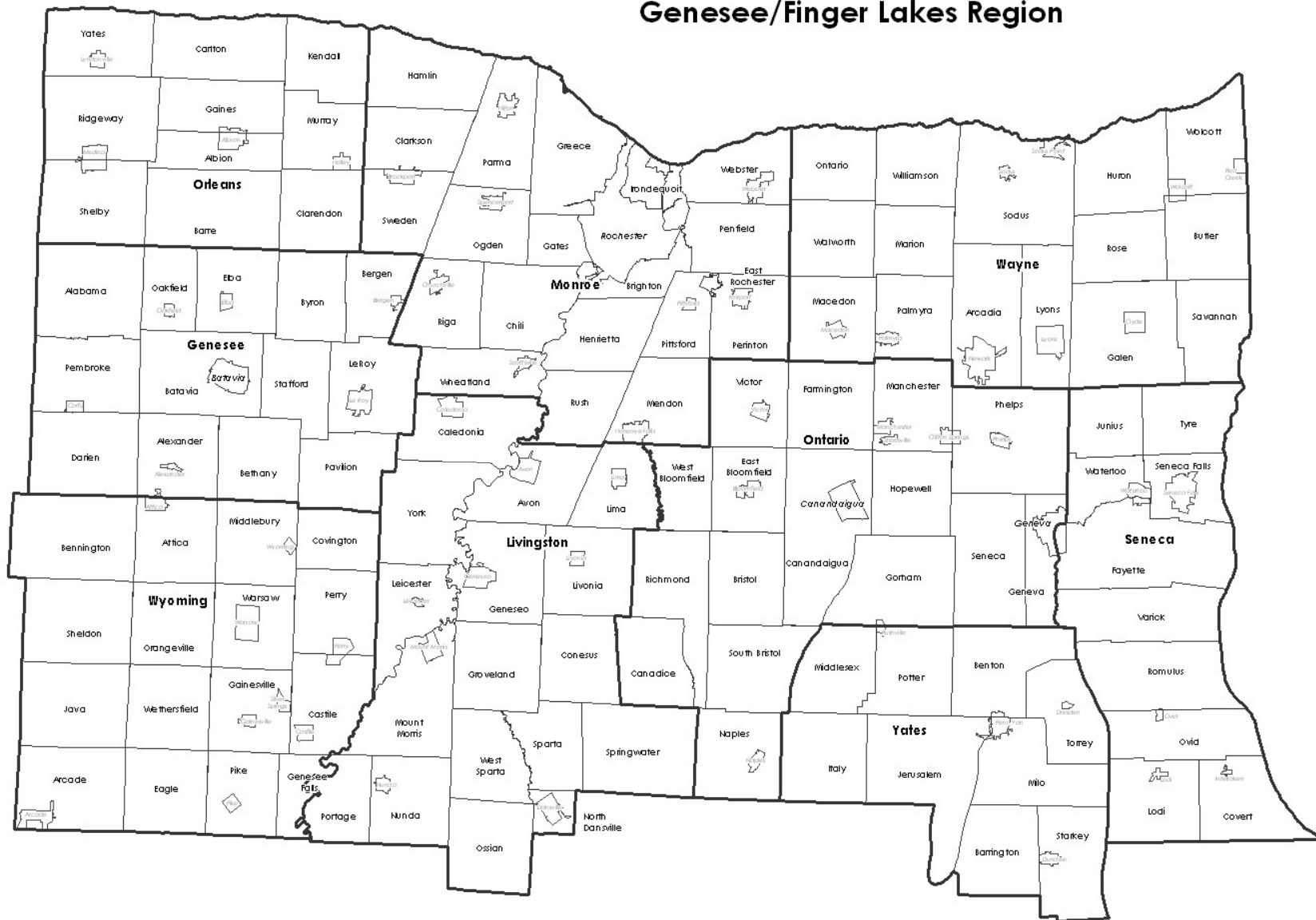
Chapter 3 provides an overview of historic, demographic, socioeconomic, and economic conditions of the District using data from federal, state and regional sources. An overview of socio-demographic information for each county and the District will be compared to Upstate New York¹, New York State and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



0 10 20 30 Miles



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 Geneseo, 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% 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, 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*.

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

**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. Also notable is the increase in employment in the Educational Services 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 2005.

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 does not include 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 2000-2005 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). The New York State Department of Labor did not publish data using NAICS until 2000. The SIC and NAICS system are not compatible, making comparison of data prior to 2000 a challenge.

Although the 2000-2005 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 Genesee-Finger Lakes 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 2005. 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 show that in 2005 the top three sectors of employment were Government, Manufacturing and Health Care and Social Assistance, as illustrated in Table 14 - *Employment in the G-FL Region by Major Sector (2005)*.

Table 14 - Employment in the G-FL Region by Major Sector (2005)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	1,018	559	465	576	676
Mining	70	-	157	87	40
Construction	809	924	12,443	2,637	262
Manufacturing	2,929	2,064	60,538	6,997	1,961
Wholesale Trade	1,008	446	13,744	1,758	117
Retail Trade	2,628	2,744	40,775	8,608	1,287
Transportation and Warehousing	522	312	6,165	1,142	204
Information	258	216	10,059	637	103
Finance and Insurance	362	352	11,529	966	-
Real Estate and Rental and Leasing	218	150	6,168	351	32
Professional and Technical Services	511	348	20,839	1,321	83
Management of Companies and Enterprises	67	36	10,220	46	-
Administrative and Waste Services	552	303	20,255	1,313	193
Educational Services	185	72	21,261	821	-
Health Care and Social Assistance	2,335	1,856	53,775	6,221	1,455
Arts, Entertainment, and Recreation	1,008	161	4,846	1,121	104
Accommodation and Food Services	1,850	1,814	24,254	4,378	612
Other Services	1,096	557	13,117	1,486	292
Total, All Government	5,907	7,065	50,214	8,205	4,243
Unclassified	28	38	637	78	21
Total, All Private	17,560	13,222	332,493	40,755	8,502
Total, All Industries	23,467	20,287	382,707	48,960	12,745

Source: Quarterly Census of Employment and Wages

Table 14 - Employment in the G-FL Region by Major Sector(2005) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	121	1,533	790	128	5,866
Mining	-	-	-	-	354
Construction	307	1,234	435	262	19,313
Manufacturing	1,895	5,996	2,306	1,171	85,857
Wholesale Trade	211	704	224	62	18,274
Retail Trade	2,028	3,270	1,579	670	63,589
Transportation and Warehousing	212	206	395	132	9,290
Information	47	289	82	82	11,773
Finance and Insurance	160	497	302	112	14,280
Real Estate and Rental and Leasing	52	195	78	100	7,344
Professional and Technical Services	173	618	224	114	24,231
Management of Companies and Enterprises	-	209	-	-	10,578
Administrative and Waste Services	194	908	-	43	23,761
Educational Services	-	112	36	-	22,487
Health Care and Social Assistance	1,368	2,648	658	1,017	71,333
Arts, Entertainment, and Recreation	79	391	163	50	7,923
Accommodation and Food Services	819	1,481	686	496	36,390
Other Services	239	622	483	288	18,180
Total, All Government	2,602	6,618	4,399	1,281	90,534
Unclassified	-	59	15	18	894
Total, All Private	8,220	21,485	9,831	5,303	457,371
Total, All Industries	10,822	28,103	14,230	6,584	547,904

Source: Quarterly Census of Employment and Wages

In fact, 16.5% of all employment in the region can be attributed to public sector employment. In 2005, there were 70,623 workers in the G-FL region employed by the Local Government, with most employed by public school districts. Indeed, the only 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 85,857 workers, accounting for 15.6% of regional employment and 18.7% of regional private employment. Manufacturing employment is a major source of export employment in the region; however its share of regional employment has decreased since 2000 and since 2004. Healthcare and Social Assistance was the third largest employment sector in the region with 71,333 employed in the sector. This can be attributed to the many healthcare facilities in the region combined with an aging regional population. In fact, employment in the Healthcare and Social Assistance sector has increased by nearly 1,000 jobs since 2004.

Retail Trade had 63,589 people employed 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 likely be attributed to an export industry.

The employment changes in the 2000-2005 period are shown in Table 15, *Change in Employment by Major Sector in the G-FL Region (2000-2005)*.

Table 15 -Change in Employment by Major Sector in the G-FL Region (2000-2005)

	2000	2005	Change	% Change
Agriculture, Forestry, Fishing & Hunting	5,504	5,866	362	6.6%
Mining	366	354	-12	-3.3%
Construction	19,990	19,313	-677	-3.4%
Manufacturing	110,177	85,857	-24,320	-22.1%
Wholesale Trade	19,124	18,274	-850	-4.4%
Retail Trade	65,575	63,589	-1,986	-3.0%
Transportation and Warehousing	9,333	9,290	-43	-0.5%
Information	12,938	11,773	-1,165	-9.0%
Finance and Insurance	15,191	14,280	-911	-6.0%
Real Estate and Rental and Leasing	7,523	7,344	-179	-2.4%
Professional and Technical Services	23,942	24,231	289	1.2%
Management of Companies and Enterprises	10,831	10,578	-253	-2.3%
Administrative and Waste Services	26,496	23,761	-2,735	-10.3%
Educational Services	17,087	22,487	5,400	31.6%
Health Care and Social Assistance	67,955	71,333	3,378	5.0%
Arts, Entertainment, and Recreation	7,146	7,923	777	10.9%
Accommodation and Food Services	37,141	36,390	-751	-2.0%
Other Services	16,210	18,180	1,970	12.2%
Total, All Government	85,862	90,534	4,672	5.4%
Unclassified	293	894	601	205.1%
Total, All Private	476,063	457,371	-18,692	-3.9%
Total, All Industries	561,925	547,905	-14,020	-2.5%

Source: Quarterly Census of Employment and Wages

There was a loss of 24,320 manufacturing jobs in the five year period from 2000 to 2005 for a decrease of 22.1%. This accounted for most of the overall loss in private sector employment. Public sector jobs grew by 4,672 jobs but that could not offset the job loss in the private sector. There was still a loss of 18,692 jobs in all industries. Many of the major industry sectors experienced a decline in employment between 2000 and 2005.

The largest increase between 2000 and 2005 was in Educational Services with a gain of 5,400 jobs and, furthermore, a gain of 1,435 jobs from 2004 to 2005. 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 includes private institutions. Other major sectors that experienced an increase in employment were Health Care and Social Assistance, Arts, Entertainment and Recreation, Government, Professional and Technical Services, and Agriculture, Forestry, Fishing and Hunting.

3.4.c Establishments

As the regional economy shifts from a largely industrial based economy it also shifts in the composition of establishment and establishment size. Table 16, *Number of Firms in the G-FL Region by Major Sector (2005)*, shows that there has been a shift from large establishments to smaller and medium sized ones as sources of employment, with the number of firms in the region increasing accordingly.

Table 16 – Number of Firms in the G-FL Region by Major Sector (2005)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	58	49	50	53	43
Mining	7	-	12	9	5
Construction	140	149	1,516	318	74
Manufacturing	92	68	950	166	41
Wholesale Trade	96	56	1,108	158	18
Retail Trade	205	210	2,267	514	117
Transportation and Warehousing	35	36	307	51	29
Information	14	19	272	44	9
Finance and Insurance	59	58	1,083	125	-
Real Estate and Rental and Leasing	42	42	737	79	13
Professional and Technical Services	85	95	1,907	226	28
Management of Companies and Enterprises	8	4	131	7	-
Administrative and Waste Services	40	48	864	132	18
Educational Services	16	5	259	16	-
Health Care and Social Assistance	136	116	1,675	219	80
Arts, Entertainment, and Recreation	29	28	256	74	16
Accommodation and Food Services	131	145	1,308	256	53
Other Services	154	127	1,800	268	78
Total, All Government	78	88	315	114	61
Unclassified	34	37	637	89	29
Total, All Private	1,382	1,297	17,145	2,804	683
Total, All Industries	1,460	1,385	17,460	2,918	744

Source: Quarterly Census of Employment and Wages

Table 16 - Number of Firms in the G-FL Region by Major Sector (2005) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	11	104	53	20	441
Mining	-	-	-	-	33
Construction	60	264	83	80	2,684
Manufacturing	38	141	44	44	1,584
Wholesale Trade	25	88	31	15	1,595
Retail Trade	172	286	154	93	4,018
Transportation and Warehousing	17	38	39	15	567
Information	11	23	14	7	413
Finance and Insurance	30	75	30	17	1,477
Real Estate and Rental and Leasing	15	56	20	18	1,022
Professional and Technical Services	39	119	47	26	2,572
Management of Companies and Enterprises	-	8	-	-	158
Administrative and Waste Services	24	97	-	13	1,236
Educational Services	-	10	4	-	310
Health Care and Social Assistance	64	155	62	54	2,561
Arts, Entertainment, and Recreation	9	41	20	8	481
Accommodation and Food Services	67	149	73	49	2,231
Other Services	60	187	86	59	2,819
Total, All Government	56	121	63	40	936
Unclassified	-	69	20	19	934
Total, All Private	671	1,915	815	544	27,256
Total, All Industries	727	2,036	878	584	28,192
<i>Source: Quarterly Census of Employment and Wages</i>					

In 2005, there were 28,192 establishments in the G-FL region and 27,256 were private sector firms. In the 2000 to 2005 time period, there was an increase in the number of establishments in the region by 980, a 3.4% increase. The large majority of growth in establishments is derived from the private sector, which had an increase of 905 private establishments.

The three 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; Other Services largely consists of very small firms where there are less than five employees but offer a very specialized service.

3.4.d Average Annual Wage

The average annual wage for the G-FL region in 2005 was \$37,132. This constitutes an increase of \$48 from the 2000 annual average wage of \$37,084, when adjusted for inflation and expressed in 2005 dollars, as shown in Table 17, *Average Annual Wage for the G-FL Region (2005)*.

Table 17 - Average Annual Wage for the G-FL Region (2005)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	\$24,435	\$26,652	\$17,792	\$23,410	\$18,823
Mining	\$39,196	-	\$36,210	\$33,150	\$35,926
Construction	\$33,496	\$37,294	\$43,880	\$42,841	\$32,823
Manufacturing	\$39,174	\$37,475	\$59,099	\$47,379	\$34,712
Wholesale Trade	\$40,257	\$35,836	\$55,817	\$52,508	\$42,091
Retail Trade	\$20,512	\$23,589	\$21,095	\$20,724	\$17,369
Transportation and Warehousing	\$33,735	\$27,187	\$29,677	\$33,548	\$24,933
Information	\$31,916	\$22,623	\$53,513	\$32,361	\$11,992
Finance and Insurance	\$42,354	\$30,014	\$57,201	\$37,567	-
Real Estate and Rental and Leasing	\$27,955	\$21,399	\$36,191	\$24,565	\$21,266
Professional and Technical Services	\$38,772	\$26,874	\$49,947	\$46,471	\$21,595
Management of Companies and Enterprises	\$49,399	\$38,875	\$79,704	\$44,066	-
Administrative and Waste Services	\$19,432	\$19,868	\$26,559	\$24,208	\$15,760
Educational Services	\$21,469	\$15,308	\$44,693	\$29,178	-
Health Care and Social Assistance	\$25,131	\$25,519	\$32,835	\$29,738	\$20,838
Arts, Entertainment, and Recreation	\$14,322	\$11,521	\$17,413	\$16,048	\$11,041
Accommodation and Food Services	\$11,792	\$9,602	\$12,938	\$13,210	\$8,648
Other Services	\$16,433	\$23,791	\$21,707	\$16,334	\$13,820
Total, All Government	\$35,306	\$35,460	\$40,485	\$35,938	\$45,848
Unclassified	\$19,400	\$19,819	\$22,208	\$23,371	\$15,457
Total, All Private	\$26,773	\$26,305	\$39,895	\$30,827	\$23,855
Total, All Industries	\$28,921	\$29,493	\$39,972	\$31,683	\$31,177

Source: Quarterly Census of Employment and Wages

Table 17 - Average Annual Wage for the G-FL Region (2005) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	\$19,614	\$22,800	\$25,269	\$17,861	\$22,815
Mining	-	-	-	-	\$36,016
Construction	\$36,662	\$36,867	\$34,821	\$23,152	\$41,790
Manufacturing	\$43,854	\$39,784	\$32,102	\$30,678	\$53,589
Wholesale Trade	\$27,766	\$39,274	\$38,718	\$35,344	\$52,825
Retail Trade	\$20,356	\$21,120	\$20,396	\$19,164	\$20,993
Transportation and Warehousing	\$32,515	\$29,668	\$25,459	\$37,872	\$30,195
Information	\$20,231	\$23,874	\$26,607	\$23,179	\$49,706
Finance and Insurance	\$34,942	\$34,894	\$45,764	\$30,109	\$53,346
Real Estate and Rental and Leasing	\$20,187	\$17,274	\$17,661	\$19,237	\$33,981
Professional and Technical Services	\$25,770	\$47,156	\$30,397	\$35,557	\$48,601
Management of Companies and Enterprises	-	\$49,683	-	-	\$78,625
Administrative and Waste Services	\$36,946	\$25,236		\$27,016	\$26,125
Educational Services	-	\$27,372	\$11,121	-	\$43,702
Health Care and Social Assistance	\$25,688	\$22,841	\$27,194	\$25,393	\$31,212
Arts, Entertainment, and Recreation	\$18,877	\$12,309	\$12,733	\$15,712	\$16,279
Accommodation and Food Services	\$11,508	\$9,527	\$9,639	\$10,654	\$12,410
Other Services	\$14,532	\$17,792	\$18,916	\$17,419	\$20,517
Total, All Government	\$34,232	\$33,895	\$40,140	\$34,718	\$38,834
Unclassified	-	\$16,800	\$21,722	\$18,480	\$21,521
Total, All Private	\$27,965	\$30,455	\$27,934	\$24,243	\$36,795
Total, All Industries	\$29,472	\$31,266	\$31,707	\$26,281	\$37,132

Source: Quarterly Census of Employment and Wages

This small increase can primarily be attributed to public sector employment. During the 2000 to 2005 time period, the average annual wage for private sector employment fell by \$453.

The third highest average annual wage by major sector was in Manufacturing. Although this sector has experienced a large loss in employment, wages have remained high and increased by \$316 in constant dollars between 2000 and 2005. This is significant, especially compared to a loss of \$453 in wages for all private industry employment in the region. Indeed, in the largest growing sector, Education Services, the average annual wage decreased by \$3,202 in constant dollars.

The major sectors with the lowest average wages in 2005 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 2005 in constant dollars.

3.4.e Unemployment

In 2005, the unemployment rate for the region was 4.7% which constitutes an increase of 1% from 2000. This is illustrated in Table 18, *Unemployment Rate for the G-FL Region, NYS and the Nation (2000-2005)*.

Although there was an increase in the unemployment rate for the G-FL region from 2000 to 2005, the region's unemployment rate dropped from 5.4% in 2004 to 4.7% in 2005. The region's unemployment rate was also lower than both New York State and the nation in 2005. Wyoming and Orleans Counties, however, both had unemployment rates higher than the region, state and nation in 2005.

While the region's unemployment rate was lower than both the state and the nation in 2000 and 2005, during that same time period the region's unemployment rate rose slightly less at a 1% increase than the nation's rise of 1.1%, but faster than state's 0.5% increase.

**Table 18 - Unemployment Rate for the
G-FL Region, NYS and the US (2000-2005)**

	2000	2005	% Change
Genesee	3.9	4.9	1
Livingston	4.1	5.1	1
Monroe	3.5	4.6	1.1
City of Rochester	4.5	6.1	1.6
Ontario	3.5	4.5	1
Orleans	4.7	5.7	1
Seneca	4.3	4.7	0.4
Wayne	3.8	5	1.2
Wyoming	4.7	5.4	0.7
Yates	3.7	4.3	0.6
G-FL Region	3.7	4.7	1
NYS	4.5	5	0.5
US	4	5.1	1.1

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 shown in Table 19, *Agricultural Economic Statistics for the G-FL Region (2005)*.

Table 19 - Agricultural Economic Statistics for the G-FL Region (2005)

	Number of Farms	Farmland (Acres)	Cash Receipts (in dollars)		
			Crops	Livestock	All Products
Genesee	555	174,900	55,556,000	89,797,000	145,353,000
Livingston	765	206,400	33,949,000	64,171,000	98,120,000
Monroe	605	105,100	50,539,000	9,679,000	60,218,000
Ontario	855	191,800	43,415,000	57,442,000	100,857,000
Orleans	480	131,100	67,581,000	9,075,000	76,656,000
Seneca	445	125,400	21,401,000	31,113,000	52,514,000
Wayne	865	162,800	80,946,000	36,565,000	117,511,000
Wyoming	730	212,200	39,176,000	171,724,000	210,900,000
Yates	690	113,500	24,324,000	34,097,000	58,421,000
G-FL Region	5,990	1,423,200	416,887,000	503,663,000	920,550,000

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

There were 5,990 farms in the G-FL region in 2005, constituting a total of 1,423,200 acres of farmland. In 2005, the agricultural industry in the G-FL region yielded \$920,550,000 in cash receipts for all products. In total, 25% of the state's cash receipts from all agricultural products came from the G-FL region. 31% of the state's cash receipts in crops and 22% of cash receipts in livestock also 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 2005, there was a net loss of 66,000 acres of farmland in the region and a net loss of 535 farms. The region made up 44% of the state's loss in farmland during this time period. 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 \$808,186,000. In the following five year period, cash receipts increased by \$112,365,000 to \$920,550,000. This increase can largely be attributed to a 23% increase in livestock cash receipts, which additionally helped off-set a 1% drop in crop receipts over the same time period.

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 10 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 2005, 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 that good.

In 2005, the industry in which the G-FL region was the most specialized was Chemical Manufacturing, which had a location quotient of 4.58, as shown in *Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2005)*.

The strength in that industry is great but it also experienced a decrease between 2000 and 2005 and even between 2004 and 2005; the location quotient in 2000 was 5.76 and in 2004 was 4.76. Machinery Manufacturing had the second highest location quotient and Beverage & Tobacco Product Manufacturing was third. Plastics & Rubber Products Manufacturing & Tobacco Product Manufacturing industry also were in the top 5 industries by location quotient in 2005.

Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2005)

NAICS	Industry	2005 LQ
325	Chemical Manufacturing	4.58
333	Machinery Manufacturing	3.35
312	Beverage & Tobacco Product Manufacturing	2.08
326	Plastics & Rubber Products Manufacturing	1.70
339	Miscellaneous Manufacturing	1.69
813	Membership Organizations & Associations	1.50
445	Food and Beverage Stores	1.49
551	Management of Companies and Enterprises	1.49
624	Social Assistance	1.46
623	Nursing and Residential Care Facilities	1.46
332	Fabricated Metal Product Manufacturing	1.45
334	Computer and Electronic Product Mfg	1.44
712	Museums, Parks and Historical Sites	1.35
519	Other Information Services	1.33
485	Transit and Ground Passenger Transport	1.29

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. 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 \$martsm Program

The Finger Lakes Energy \$mart 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 \$martsm programs. These programs are funded by the System Benefits Charge (SBC), a fee to users instituted by the New York State Public Service Commission to fund public policy initiatives in order to equalize the effects of electric utility deregulation.

As the organization charged with the implementation of this program for the region from April 2001 through April 2007, G/FLRPC facilitated energy improvement projects, hosted energy workshops, training opportunities and public forums, and developed 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 \$mart Communities encourage decision-makers and community leaders to adopt

energy efficiency as a means of economic growth, community development and environmental stewardship. To date, Finger Lakes Energy Smart Communities has recruited over 140 partners. In addition, there are more than 76 Energy Star®-labeled new home builders and over 22 Building Performance Institute-accredited Home Performance contractors active in the region, as well as 10 installers of small windmills and 18 approved solar installers.

4.3 Finger Lakes Wired

The G-FL region was one of thirteen 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. Since being chosen as a recipient of the WIRED initiative, the Finger Lakes Partnership has adjusted its moniker to leverage the United States Department of Labor WIRED Initiative. As a result, the Partnership is now known as Finger Lakes Wired.

Finger Lakes Wired is a partnership of more than twenty-one economic development, educational, workforce development, and business organizations from the nine-county Genesee-Finger Lakes region. The Governing Board is comprised of the chief executive officers from its partner organizations. These leaders have been meeting regularly since May 2006 to support a strategic and collaborative approach to regional economic development. Not only have they adopted a mission and vision for this effort, but they have agreed to guiding principles, a strategic direction and key strategies that lead to specific outcomes of this collaborative effort. An implementation plan was developed to provide an early stage roadmap for the WIRED Initiative in the region; this plan is well underway.

The Governing Board has utilized strategic feedback from its National Advisory Panel to refine specific activities associated with Finger Lakes Wired as well as to identify other

opportunities for improvement in the planning of regional economic development activities.

Regional partners have begun the important work of identifying and mapping key education, economic development, entrepreneurial, innovation and workforce development resources in the region. This will help leaders better align resources and initiatives to support the growth of entrepreneurs and existing businesses throughout the region. Several presentations have been made to key stakeholder groups within the region to obtain feedback on the activity planned under Finger Lakes Wired. These discussions also help partners connect to other economic development initiatives within the region. A team of experts has additionally gathered to analyze and evaluate data from a variety of sources to support a more integrated and thoughtful approach to regional economic planning. This team has just begun to review additional data sources provided through the United States Department of Labor's Workforce & Innovation Technical Solution to better inform future initiatives.

4.3.a Industry Clusters

Finger Lakes Wired has identified targeted industry clusters to focus its collaborative efforts on developing, supporting and marketing. The targeted cluster industries are Optics and Imaging; Biotech and Life Sciences; Food/Beverage and Agriculture; Advanced Manufacturing; and Alternative Energy.

Finger Lakes Wired partners are working together to engage business leaders in a substantive way, using a strategic planning process based on a thorough analysis of key economic indicators to refine specific actions necessary to support the creation and expansion of businesses in key industry segments. This process has been used in other regions to accelerate growth in key segments of the regional economy.

Industry Clusters are geographic concentrations of companies and institutions that rely on an active set of relationships among themselves. These relationships generally fall into three categories: Buyer-Supplier relationships; Competitor/Collaborative relationships, or Shared Resource Relationships. Economic Development organizations tend to engage in targeted marketing aimed at attracting new business investment in "Cluster" industry sectors, based upon the perception of clusters as a critical mass that increases efficiencies and competitiveness. *Buyer-Supplier Cluster Relationships* are those businesses with linkages of goods, services or raw materials critical to a particular industry.

Competitor/Collaborative Cluster Relationships are businesses that produce the same or similar goods or services at a specific level in the value chain. *Shared Resources Cluster Relationships* are businesses who may be producing very different goods for different markets; however, they rely on the same sources of raw materials, technology, human resources or information for their production needs. The compound effect of clusters makes the local industry more competitive and benefits the regional economy.

4.3.b Finger Lakes Wired Funded Initiatives

1. Masters of Science Degree in Science and Technology Commercialization – University of Rochester
 - Executive Program founded for the study of entrepreneurship
 - Addresses the shortage of people who can look at a technology and determine whether it can be commercialized
 - Utilizing curriculum from University of Texas at Austin

Three students have assessed six technologies with one selected for a full commercialization plan. A new class of eight to ten students is to begin in April 2007.

2. Entrepreneurship & Strategic Growth Immersion Sequence Program – Rochester Institute of Technology
 - Immersion Sequence program targets entrepreneurs and high-growth potential small enterprise managers wishing to join or lead innovation teams.

Focus groups were held with more than twelve company executives to tailor course curriculum to meet regional business needs. The first class is expected to begin in May 2007.

3. The Entrepreneurs Network (TEN)
 - 6-month program including a Boot Camp, Work Shops, and Panel Events that are designed to optimize exposure to, and interaction with leading local and national entrepreneurial experts, connecting entrepreneurial acumen with economic growth
 - Intended to introduce entrepreneurs to new ideas and avenues to attract capital

Eighteen CEOs or founders of high tech companies from across the region completed the first session in November 2006. Five members are in discussions with Strategic or Financial Investors. Logical Images, a TEN member, received \$2.7 million in funding from a venture capitalist outside of the region and expects to add thirty new jobs by the end of 2007. HouseDigital added three full-time employees since joining TEN in March 2006, expanding its sales force as well as tech crews; ICS Telecom secured a multi-year contract with the Department of Justice valued at up to \$50 million; ePostmarks secured \$200,000 in angel funding and has a strategic partnership pending. Four other TEN inaugural members are in discussions with angel, venture capital sources and/or potential strategic partners. Also, approximately twenty national and regional entrepreneurial experts participated as speakers, panelists or coaches for TEN during 2006. The second class of sixteen CEOs and company founders has begun.

4. Pre-Seed Workshops – High Tech Rochester

- Two day sessions will provide an assessment of business potential for a specific invention, and will foster a collaboration of technologists/inventors knowledgeable about business creation realities and connect them with a business network for future assistance
- Addresses the gap in the commercialization continuum at “pre-seed” stage and will improve the identification and qualify technologies for transfer

The first pre-seed workshops were held on November 2 and 10, 2006 in Geneva with about fifty participants investigating technology commercialization options.

5. SBIR Outreach and Access – High Tech Rochester

- Intent is to move the region’s SBIR/STTR participation to a much higher level through the assistance of grants and connection with other available resources
- Will educate entrepreneurs and small business owners of grant funding opportunities, proposal reviews, proposal preparers, and solicitation finders

The initiative has assisted five first-time applicants with strategies and proposals to leverage other regional efforts such as the assistance found through NYSTAR and Insyte Consulting.

6. Tech Commercialization Process – High Tech Rochester

- Intent is to accelerate the commercialization of university and orphan technology from local companies
- Program proposes to augment the traditional licensing programs of the local research institutions with entrepreneurs and product development specialists to identify and nurture high potential technologies and lead them into the marketplace either by new business formation or by infusion into existing regional companies

Twenty prospective technologies have been identified for assessment through a “tech clearinghouse” leveraging resources from High Tech Rochester, Rochester Institute of Technology, University of Rochester and Excell Partners.

7. Scholarship Fund – Rochester Works, Finger Lakes Works, Genesee/Livingston/Orleans/Wyoming Workforce Investment Board

- Addresses skilled worker shortages in the key industry segments of Alternative Energy; Biotech & Life Sciences; Food & Agriculture; Optics & Imaging; Advanced Manufacturing; Information Technology; Engineering; Business Services; and Health Care
- Will provide matching scholarships to businesses to train their employees in skills that will lead to credentials/certifications or transferable skills

Since the program launch in September 2006, \$385,000 in WIRED funds has been obligated for twenty-eight regional businesses to increase the skills of 257 workers. These businesses are investing more than \$644,000 in matching funds in support of the skill upgrade training.

8. Regional Apprentice System – Monroe Community College, Finger Lakes Community College, Genesee Community College
 - Develop industry-based apprentice system for the Finger Lakes Region
 - System will begin with several new education/training programs for three of the four targeted industry clusters

Skill competencies and training outlines have been established, with worker training planned for the spring of 2007. Monroe Community College was awarded an additional \$7,500 by the Corning Foundation to support their work in this area.

9. Educator Internships – Finger Lakes Works, Genesee/Livingston/Orleans/Wyoming Workforce Investment Board, Rochester Area Career Education Collaborative
 - Placing educator-interns in industry and will engage employers from high tech and emerging industries of Optics/Imaging, Biotech/Life Sciences, Alternative Energy, and Food and Agriculture
 - The project will engage educators and will impact students by creating linkages to high-tech and emerging industries that currently do not exist among school districts, educators, and employers in the region

Workforce Investment Boards are working with the Rochester Area Career Education Collaborative to integrate efforts to match educators with local companies to see innovation in action and bring the experience to the classroom.

10. Predictive Analysis – Business Attraction – Greater Rochester Enterprise
 - This project will help develop robust knowledge of assets in targeted clusters, identify high-growth sub-sectors of those clusters (and leading companies within those sub-sectors), perform in-depth research on each identified company, and will set up mission trip of economic development professionals, senior business leaders, government officials, and other partners to proactively visit target companies
 - Project will augment current economic development activities and be adopted by the Economic Development system (leading to systems transformation and sustainability)

Sixty-five companies have been identified that could benefit by connections to the region in relation to targeted industry clusters of Optics/Imaging; Biotech/Life Sciences; Food/Agriculture; Advanced Manufacturing; and Alternative Energy.

An executive level outreach campaign to inform decision makers and provide leads for attraction effort is planned for the near future.

11. Predictive Analysis – Business Retention and Expansion – Greater Rochester Enterprise

- Develop and utilize predictive analysis tools to identify companies with high likelihood of expansion or contraction, so that economic development resources can be focused wherever necessary
- Understanding and communication of individual companies' needs will make it easier to plug existing companies into new innovations occurring in the region, which may help them solidify and grow their businesses

A predictive analysis model is being tested by actual assessment by economic developers in the region. The assessment is currently underway and is yielding results that will be used to refine the model.

12. Finger Lakes Resource Network – Rochester Institute of Technology

- Develop a readily accessible web portal designed to more easily and effectively connect the G-FL region economic and workforce development stakeholders, companies and cluster organizations with economic and demographic data, regional asset inventories and company directories

Staff from Rochester Institute of Technology and Greater Rochester Enterprise are working to assess user needs and requirements for the proposed portal in addition to benchmarking similar websites and economic development efforts.

4.3.c Finger Lakes Wired Related Activities

The success of Finger Lakes Wired has led to other successes in the G-FL region, including:

- Rochester Institute of Technology (RIT) received a \$1.1 million USDOL High Growth Job Training Initiative grant to enable RIT and its partners to provide high skill training to businesses engaged in the food and beverage manufacturing industry throughout the region. RIT is working closely with Constellation Brands, Wegmans Food Markets, the New York Wine and Culinary Center and the region's Workforce Investment Boards.
- The three Workforce Investment Boards and Community Colleges in the region have come together to support increased recruitment and training of technician level workers for Optics, Printing and Advanced Manufacturing companies throughout the region. The team is planning to evaluate data and work with industry leaders to better leverage existing resources as well as model successful programs such as the "Dream It, Do It" campaign supported by the National Association of Manufacturers.

- Finger Lakes Wired is working to support the development of the Center for Excellence in Math and Science under the Rochester Area Colleges. The Rochester Area Colleges is a consortium of 19 college and universities located throughout the nine county region. The Center for Excellence in Math and Science will be a unique collaborative effort building on the strengths of individual members to foster advanced preparation and success in the preparation of students in fields such as engineering, medicine, computer technology, health and human services, research and development and teacher education.
- A proposal to create the Upstate Partnership under the New York State Office of Science, Technology & Academic Research (NYSTAR) Regional Partnership Program Request for Proposals is underway. The Upstate Partnership builds on the early work of Finger Lakes Wired. Several Finger Lakes Wired activities are likely to find sustainability and support through this NYSTAR effort. The Upstate Partnership will utilize the Finger Lakes Wired Governing Board to advise the NYSTAR related activities as well as target its work around new and emerging Optics & Imaging, Biotech & Life Sciences, Food & Agriculture and Alternative Energy companies while enhancing competencies in Information Technology and Advanced Manufacturing.
- The Upstate Partnership led by Excell Partners, Inc., plans to maximize the ability of the region to transform new knowledge and technologies into commercial use for the benefit of existing and emerging companies through a seamless and coordinated infrastructure.
- The University of Rochester and other regional partners coordinated and sponsored several events to support Entrepreneurship Week USA which is supported by the Kauffman Foundation, Inc. Magazine and the New York Times. Entrepreneurship Week was held February 24 to March 3, 2007. Several partners held activities during Entrepreneurship Week, while elected officials supported the effort through proclamations designed to celebrate the region's entrepreneurial spirit and encourage residents to think about the next big idea.

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.

New York State's Brownfield Opportunity Areas Program, through the Department of Conservation, provides financial and technical assistance to municipalities that can be used to complete revitalization plans and implementation strategies for areas affected by brownfield sites.

In 2006, G/FLRPC, partnering with Wyoming County and the Village of Perry, submitted a Brownfield Opportunity Areas Program application for a ten acre area in the Village of Perry containing at least seven brownfield sites. The intent of the application is to secure a pre-nomination study of the site in order to collect accurate data and information on the site, undertake a community visioning process for the future of the site, and to initiate redevelopment of the site and adjacent areas. Eventual remediation and redevelopment of the site is critical to bolstering economic development in the Village of Perry, as the site is centrally located in the village and is adjacent to commercial and residential uses. Redeveloping the site would not only enhance the viability of the village center and adjacent properties, but would also return the property to the tax rolls and encourage in-fill and compact development, thereby helping to preserve agricultural land.

Additional brownfields exist in several towns and villages in the region, appropriate remediation and redevelopment of these sites should be encouraged and facilitated so as to accrue the financial, environmental, economic development and land use benefits afforded through brownfield reuse and redevelopment. To this end, Wayne County has created a brownfields cleanup program, with an initial project underway in the Town of Sodus.

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.

Monroe County is undertaking a Brownfield Opportunity Areas study that will address the Buell Road/Scottsville Road area in the vicinity of the Greater Rochester International Airport. Monroe County is additionally examining a number of tax foreclosed brownfield properties in various locations throughout the county for their suitability for remediation and redevelopment.

4.5 Fingers Lakes Land Use Project

The Finger Lakes Land Use Project has been under development by G/FLRPC. 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 effects this has on the natural (i.e. lakes, streams, woods) and cultural (i.e. farms, villages, cities.) landscapes of the Finger Lakes region.

The first phase of the project focuses on data development and analysis. After review by G/FLRPC's Planning Coordinating Committee and a municipal focus group meeting, three primary indicators 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 the location and capacity of public water and sewer systems, 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 indicator examines regional open space resources. Municipal representatives indicated that 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 protections such as land in agricultural districts all the way through to National Forests.

The third indicator concerns village/small city center "re-purposing." The vitality of the villages and small cities of the region are important from a tourism, and therefore, economic development standpoint. Also, consideration is being given to these already developed areas, most of which have existing infrastructure. This indicator seeks to measure the vitality of downtowns and their contribution to the existing and potential tourist market. Downtown areas were historically centers of commerce. This portion of the analysis examines what uses and built forms are viable in order to maximize the potential of downtown areas and ensure that they remain active and vibrant. Data indicators include analyses regarding property values and comparisons of local land uses and general socio-economic analysis within targeted census blocks.

The second phase of the project will focus on municipal outreach. 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.

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, Ontario, Orleans, Seneca, Wayne and Wyoming Counties and the Cities of Geneva and Rochester. A zone designation should now be made in Yates County.

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 four phases in the “Build Now-NY” program. Phase I, II, III, and IV sites all exist in the G-FL region. 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 the region 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
Livingston Industrial Complex	Avon, Livingston County	Multi-Tenant Business & Technology Park

Source: Governor’s Office of Regulatory Reform, 2005

One Phase III site is available in the region for use as a Multi-Tenant Business and Technology Park. The Phase III site in the region is listed in Table 23.

Table 23 – Genesee-Finger Lakes Region Qualified Phase III Build-Now NY Sites		
Site Name	Location	Site Type
Gateway II Business Park	Town of Batavia, Genesee County	Multi-Tenant Business & Technology Park

Source: Governor's Office of Regulatory Reform, 2006

There are two Phase IV sites in the region, available for High Technology Manufacturing and for a Multi-Tenant Business and Technology Park. The Phase IV sites in the region are listed in Table 24.

Table 24 – Genesee-Finger Lakes Region Qualified Phase IV Build-Now NY Sites		
Site Name	Location	Site Type
Medical & High Technology Business Park	Town of Batavia, Genesee County	High Technology Manufacturing
Pembroke Business Park	Pembroke, Genesee County	Multi-Tenant Business & Technology Park

Source: Governor's Office of Regulatory Reform, 2006

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, energy, 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 for the Genesee-Finger Lakes Region: 2005-2025 (LRTP: 2005-2025)* was adopted in December 2004. An update to the *LRTP: 2005-2025* is being developed with adoption expected in summer 2007.

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 occur when new projects are identified through federal discretionary programs or modifications to existing projects are deemed necessary. The current TIP was adopted in 2005 with an update scheduled for summer 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. Telecommunications infrastructure includes broadband, fiber optic circuits, and cellular telephone and communication service.

Increased broadband service or the installation of fiber optic circuits can be instrumental in attracting and retaining businesses and industries that contribute to the economic development of the region. Additionally, there is a lack of consistent cellular telephone service in parts of the region. Inconsistent or unavailable cellular service can impede not only economic development, but can also prevent timely communication in instances where public safety or security are jeopardized and require prompt attention.

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. Monroe County is working with service providers to establish a wireless data network in the county. Some counties 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 twelve towns and villages in Genesee, Livingston and Orleans Counties and on a wholesale basis to eleven towns and villages in Genesee, Ontario, Orleans and Wayne Counties. Several municipalities are also provided with supplemental supplies as necessary. The majority of water used by the MCWA comes from Lake Ontario. The MCWA is presently undertaking the Eastside Water Supply project. At an estimated cost of \$110,000,000, the project will construct a new water treatment plant and storage distribution system in the Towns of Webster and Penfield that will serve the northeastern portion of the region.

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. Indeed, a significant percentage of water used by the City of Rochester is supplemented by water from Hemlock Lake, one of the Finger Lakes located south of the city. Waterline extension projects 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 Pure Waters Program

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 1999 data provided by the New York State Department of Environmental Conservation, there were 37 secondary and 27 tertiary treatment facilities operating in the G-FL region (this data is currently being updated as part of the Finger Lakes Land Use project, see section 4.5). 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

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>.

through facility consolidation. In other instances, new facilities are being constructed in order to meet the demands of growing populations, to supplement or replace aging facilities or to provide service to communities plagued by failing on-site septic systems.

In addition to the public health and environmental consequences of effective water and wastewater facilities, there are economic development implications as well. There is a strong link between water and wastewater capacity and the ability of the region to attract and retain business and industry. Without adequate water and wastewater capacity, firms are unable to expand or to locate at specific sites and will look elsewhere, stifling economic development in the region. To better understand what sites are best equipped with adequate water and wastewater capacity, G/FLRPC is collecting regional water and sewer data as part of the Finger Lakes Land Use project and, once complete, will provide this data to regional partners who are involved in marketing sites for industrial and business development.

4.8.e Energy

4.8.e.i Traditional Energy

The energy mix in New York State as a whole is comprised of 29% nuclear power, 22% natural gas, 18% coal, 17% hydropower, 12 % oil, 1% solid waste, and less than 1% each of biomass, wind and solar power⁴. The Genesee-Finger Lakes region is home to one nuclear power plant, the Robert E. Ginna Nuclear Power Plant in Wayne County and two coal-fired power plants, Rochester 7-Russell Station in Monroe County and AES Greenidge in Yates County.

4.8.e.ii Alternative Energy

A significant number of counties and municipalities in the Genesee-Finger Lakes region have, or are considering industrial wind turbine development. G/FLRPC administers the contract with New York State Energy Research and Development Authority (NYSERDA) and New York State Association of Regional Councils (NYSARC) to provide assistance to local governments on wind energy issues. This program provides for technical training and assistance to regional planning councils regarding wind energy. G/FLRPC and NYSARC, in turn, provide direct technical assistance, as well as education and outreach on wind energy planning issues to counties, municipal boards, elected officials, industrial development agencies, code enforcement offices, and other municipal staff. This allows regional planning councils, like G/FLRPC, to be more responsive to the needs of municipalities and provide them with up-to-date, reliable, and accurate information on wind development.

Four ethanol plants are in various states of planning and development in the Genesee-Finger Lakes region; in the Town of Shelby (Orleans County), the Town of Greece (Monroe County), the Town of Caledonia (Livingston County), and the Town of Romulus (Seneca County). These plants will utilize existing technology for using corn to

⁴ *New York Public Service Commission*

produce ethanol, as well as new developments in cellulosic ethanol production, using woody debris and plant fiber to create ethanol. Northern Biodiesel also plans to open a plant in Wayne County to manufacture biodiesel, which can be used interchangeably with petroleum diesel, requiring no retrofits of vehicles. Additionally, the Mill Seat landfill in Monroe County and the Seneca Meadows landfill in Seneca County use methane produced from the landfills for power generation. Monroe County is also investigating a possible waste-to-energy program in partnership with High Falls Brewery.

Renovation of the Strong National Museum of Play in the City of Rochester, Monroe County, and the construction of the YMCA of Greater Rochester in the Town of Penfield, Monroe County, each represent high-profile developments in the region using green building technology. East Rochester School District has installed a fuel cell to meet its power needs. The City of Rochester has just completed the first LEED-certified green municipal building in the region with the Felix Street Water Operations Center.

4.8.e.iii Alternative/Smart Energy Initiatives

The Genesee-Finger Lakes region is striving to become a known leader in alternative energy production and industries. Alternative energy production- fuel cells, solar technologies, wind power, bio-fuels- and its component parts have been identified not only as potential growth areas, but also areas in which the region can utilize existing strengths in agriculture, optics and imaging, and manufacturing to capture opportunities in the alternative energy sector and to become a region recognized for green practices and sustainability.

4.8.e.iii.a Greenprint Rochester

In early 2007, *Greenprint Rochester, New York: Turning Green Into Growth*, a greenprint for the Greater Rochester region was released. The greenprint, which arose out of a charrette organized by Senator Hillary Rodham Clinton, the Greater Rochester Enterprise, and the U.S. Green Building Council, outlines a plan to develop and adopt sustainability, green building practices, and alternative energy in the region and to tie these to regional economic development. The greenprint is a one of a kind report for a city or region, a roadmap to increasing sustainability and green buildings and highlighting and improving the regions' alternative and smart energy cluster.

4.8.e.iii.b Smart Energy Initiative

Greater Rochester Enterprise (GRE) has developed an alternative, or "smart", energy growth strategy to develop, enhance, and promote alternative energy resources in the G-FL region. This strategy largely revolves around increasing research and development in alternative energy technology, capitalizing on existing expertise, leveraging existing manufacturing assets to attract alternative energy component production firms, and developing alternative energy demonstration projects in the region to showcase and promote the region's alternative energy capabilities and opportunities.

The G-FL region has a promising alternative energy cluster, due to its advantage in precision manufacturing, innovative companies, a highly trained workforce, and university research. The region is a vital center of fuel cell development, with operations by Delphi, General Motors, and Harris RF. Biofuels are a developing strength, with four ethanol plants being planned for this region and one biodiesel manufacturer. Beyond the industrial wind farm projects being planned for this region (including the ten turbines currently operating in Wethersfield, Wyoming County), GRE has identified more than sixty companies that have capacities to make wind turbine components. Finally, local skills at thin films and imaging, as well as support from centers like the NanoPower Research Labs at Rochester Institute for Technology can be translated to an advantage in solar energy and photovoltaic cell production.

4.8.e.iii.c Rochester Green Business Network

Rochester Green Business Network (RGBN) is a membership-based network, combining the interests of businesses, institutions, and environmental professionals in regards to the environment. A program of the Rochester-based Center for Environmental Information, RGBN promotes sound environmental management and provides a forum for members to share experiences and ideas.

4.8.e.iii.d Apollo Alliance

The Apollo Alliance is a national program, a partnership between business, labor, environmental groups, and social justice organizations. This alliance was formed to advocate for energy independence and job growth related to energy and environmental technology. A New York City chapter has existed and recently, a New York State chapter has been chartered. The Apollo Alliance Ten Point Plan includes: promoting advanced technology and hybrid cars, investing in more efficient factories, encouraging high performance buildings, increasing the use of energy efficient appliances, modernizing electrical infrastructure, expanding renewable energy development, improving transportation options, reinvesting in urban smart growth, planning for a hydrogen future, and preserving regulatory protections.

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. Of the fourteen possible “Beneficial Use Impairments” (i.e. aesthetics, fish consumption, beach closings) listed by the EPA, all were identified to be present within the Rochester Embayment in the Stage I report. As of 2007, significant progress has been made that will eventually lead to the elimination of many of these BUI’s, indicating a gradual improvement of the health of the natural environment of the Embayment and surrounding areas.

The Monroe County Department of Health has the lead role in RAP monitoring, implementation and updates; 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. Further information on the status of RAP progress can be found at the EPA website at the following address: <http://www.epa.gov/glnpo/aoc/rochester.html>.

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 regulated communities; and analysis of Notice of Intents and Annual Reports and implementation of minimum measures.

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, Honeoye Lake, Genesee River basin, Black Creek, Oatka Creek, and Oak Orchard River watersheds.

4.9.d Other Water Resource Initiatives

4.9.d.i Genesee River Action Strategy (October 2004)

The Genesee River Action Strategy is a concise and action-oriented document that compiled currently available information about the state of the watershed and ongoing assessment, outreach and implementation activities in a State of the Basin report and proposed environmental and natural resource priorities and measurable objectives as a strategy for achieving those goals. The process brought 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. Some implementation activities outlined in the strategy are currently underway or have been completed. Additionally, G/FLRPC is currently coordinating the development of an annual Genesee River Basin conference series for the purpose of generating awareness and project monitoring.

4.9.d.ii 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 developed specific water quality control laws and/or ordinances for local governments within the Canandaigua, Cayuga, and Conesus Lake watersheds.

The project involved the following components. The first was the assessment of existing local laws, ordinances, and practices that relate to water resources in all 56 municipalities in the three watersheds. Next was the development of specific water quality control laws and/or revisions to existing regulations for the thirteen selected local municipalities within the three watersheds. The third component was the preparation of *Protecting Water Resources through Local Controls and Practices: An Assessment Manual for New York Municipalities*, a manual of model local laws and case studies to reduce water pollution from non-point sources developed as a resource for local governments. The last component was a series of workshops throughout New York 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.iii 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 board education and outreach regarding erosion and sediment control;
- Identification and analysis of significant erosion areas within the riparian corridor with the development of the report *Identification and Analysis of the Riparian Corridor in the Black and Oatka Creek Watershed*, which was responsible for

securing \$97,500 in funding for three segments of stream stabilization and remediation;

- 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 the document *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 Multi-Jurisdictional All Hazard Mitigation Planning

Hazard Mitigation Planning is an important aspect of a successful mitigation program. Hazard mitigation planning is a collaborative process whereby hazards affecting the community are identified, vulnerability to the hazards are assessed, and consensus reached on how to minimize or eliminate the effects of these hazards. In recognition of the importance of planning, states, counties and municipalities with an approved All Hazard Mitigation Plan in effect at the time of disaster declaration may receive additional Hazard Mitigation Grant Program funding.

G/FLRPC is currently working on hazard mitigation plans for the following five counties within the G-FL region: Wayne, Livingston, Wyoming, Orleans, and Genesee. The Wayne County plan was approved by the Federal Emergency Management Agency (FEMA) in January 2007 and has been adopted by the county and all of its municipalities. Monroe County, as well, has an adopted All Hazard Mitigation Plan.

Drafts of four plans, the Genesee, Livingston, Orleans and Wyoming County reports, have been completed and are currently undergoing review at the New York State Emergency Management Office. G/FLRPC staff will make any state mandated revisions to these documents before they are submitted to FEMA for review.

4.11 Regional Marketing and Research

4.11.a Greater Rochester Enterprise

Greater Rochester Enterprise (GRE) is supported by a team of private and public sector leaders, whose funding is dedicated to improving economic performance across the nine-county Genesee-Finger Lakes region. GRE's primary goals are to retain and grow existing business; to promote entrepreneurial activities and to professionally market the region as a competitive, vibrant and high-profile place for business investment. 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:

- Professional, timely responses to all requests for information from potential business investors, including site searches and detailed data compilation.

- Professional, full service management of projects.
- Professional proposal development/project management for potential business investor projects that includes:
 - Detailed demographic, statistical, comparative and industry specific information about the region.
 - Detailed site/building searches as needed.
 - Identifying available grants, incentives and financing options.
 - Providing detailed information about living in the region, including housing, schools and cultural amenities.
 - Facilitating meetings with appropriate city, county and state and federal agencies as needed.
 - Coordinating meetings with appropriate service providers such as legal, accounting and banking.
 - Assisting with workforce recruitment or training needs.

In 2004, GRE, the City of Rochester and Monroe County created a partnership wherein GRE was designated as the single point of contact for economic development clients. Since that time, Wayne County has also become a full partner in GRE and Livingston County has contracted with GRE for marketing assistance. The partnerships formed with these counties assign GRE with a range of responsibilities including marketing, sales and client management. The counties have retained administrative and approval functions for economic incentives and programs, but work in conjunction with GRE in offering incentives and programs in a coordinated team approach.

4.11.b Center for Integrated Manufacturing Studies

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.b.i Roadmap for the Revitalization of Upstate New York Manufacturing

Launched by CIMS in 2003 the *Roadmap for the Revitalization of Upstate New York Manufacturing (Roadmap)* 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.

Beginning in 2003, with initial funding from the New York State Office of Science, Technology and Academic Research (NYSTAR), the *Roadmap* 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.

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

In 2005, with NYSTAR funding, the initial research phase of the Roadmap -covering four industry clusters- was concluded and research into seven additional industry clusters- Biomedical; Communications and Media; Fashion, Apparel and Textiles; Information Technology; Remanufacturing; Transportation Equipment; and Wood Products- was undertaken.

The preliminary research findings were brought before a series of focus groups for testing and feedback in 2006. The focus groups consisted of manufacturing businesses, cluster organizations, economic development organizations, regional planning representatives and state and federal government agencies.

A final *Roadmap* report was produced in 2006 detailing the major findings, recommendations and strategies for moving forward. The following ten competitive challenges were identified as being most fundamental to the revitalization of manufacturing in upstate New York:

- Globalization Pressures
- Broken Supply Chains
- Cost of Doing Business in New York State
- Weak Business Support Infrastructure
- Weak Innovation Execution
- Slow Manufacturing Sector Transformation
- Fragmented New York State Industrial Strategy
- Limited Collaboration Among Stakeholders
- Skilled Workforce Challenges
- Limited Linkages to Universities

The *Roadmap* also presented recommendations for each of the ten competitive challenges as a starting point for beginning a region- and state-wide dialogue on how to revitalize the regional and state economies through manufacturing excellence.

4.11.b.ii Roadmap Implementation Activities

In addition to offering the above mentioned recommendations, CIMS is pursuing several implementation pilot projects designed to address the competitive challenges identified in the *Roadmap*. The Knowledge Clearinghouse provides companies and clusters with

competitive knowledge critical to their competitiveness and long-term viability in the region. The Innovation Test Bed identifies and facilitates the development of needed manufacturing-related innovations and helps companies implement them. Cluster Collaboration Support, working with organizations such as industry or trade associations on effective cluster strategic planning, focuses 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 helps to 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.

Additionally, the City of Rochester Department of Economic Development and CIMS have initiated the Rochester Manufacturing Initiative (RMI), a pilot project focusing on evaluating and assisting manufacturing businesses within the City of Rochester. The objective of the RMI is improving the competitive health and economic well-being of City of Rochester manufacturers through assessments by CIMS, culminating in the development of a three to five year work-plan and in identifying resources to implement the plan.

4.11.b.ii.a The Knowledge Clearinghouse

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 effort at CIMS works 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

4.11.b.ii.b The Innovation Test Bed

The Innovation Test Bed is an important resource to identify and facilitate development of needed manufacturing-related innovations and help companies implement them. The Test Bed helps 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
- Providing assistance and support to companies pursuing innovation through advanced technologies
- Providing facilities, equipment and laboratory support for validation, testing and feasibility studies in support of innovative concepts

4.11.b.ii.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 industry challenges. CIMS continues to work with industry and trade associations on effective cluster strategic planning to focus their member's limited resources on actions that will make them collectively more successful.

4.11.b.ii.d Technical Assistance

CIMS works with manufacturing businesses to enhance their competitiveness through the delivery of customized applied technology assistance projects and training. A variety of resources and services are available to help identify needs, barriers, and deliver solutions to address them for regional economic impact.

These resources and 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.

4.12 New York State Canal Commission

In 2005, an interagency task force was formed 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.

4.12.a Erie Canalway National Heritage Corridor

The Erie Canalway National Heritage Corridor is one of about two dozen federally designated national heritage areas or corridors in the nation. By being designated as a national heritage corridor, the Erie Canalway is in a position to receive resources and technical assistance in the preservation and interpretation of the historical, natural, scenic and recreational resources of the Canalway in ways that reflect its national significance and that help foster community revitalization.⁵

The intent of the national heritage corridor designation is to not only protect and preserve the Erie Canal corridor, but also to spur tourism and economic development in the towns, villages and cities located along the corridor. To this end, a Preservation and Management Plan is being developed and implemented that will guide future use and development of the canal and its environs. The Western Erie Canal Alliance is leading the implementation effort in the region. The G-FL region stands to be positively impacted by the national heritage corridor designation and the subsequent Preservation and Management Plan through increased tourism and economic development opportunities.

In 2006, the Western Erie Canal Alliance, along with the Landmark Society of Western New York, received a \$192,000 grant from the New York State Quality Communities Grant Program to partially fund establishing a Regional Main Street Revitalization Coordinating Program for canal communities in the Western Erie Canal Heritage Corridor. The intent of the program is to focus on revitalizing the main streets of villages in the corridor utilizing the assets of the canal. Three municipalities from Wayne, Orleans and Niagara (which is not located in the G-FL region) Counties will be selected to receive specific and intensive assistance in establishing and implementing a main street revitalization plan.

4.13 The Technology Farm

In support of the region's existing agricultural expertise and the growing Food/Beverage and Agriculture industry sector, the Cornell Agriculture and Food Technology Park (The Technology Farm) has been an important resource for expanding and improving the industry. The Technology Farm provides opportunities for potential new food and beverage businesses to incubate in close proximity and with considerable access to Cornell University facilities and expertise.

4.14 Village Main Streets

Village main streets in the G-FL region are tremendous assets and opportunities for encouraging tourism, historic preservation, small business development and, in turn, economic development. Main Streets are seen as current, former, or potential community

⁵ www.eriecanalway.org Last viewed online 2/22/07

centers and greatly contribute to the unique sense of place of the region. G/FLRPC is engaged in several initiatives to assist communities in better utilizing their main streets, including the community centers program and the Preparing Village Main Streets for Planning project.

The Alliance for Business Growth, a partnership between the economic development offices of Livingston and Wyoming Counties, offers assistance to small business owners in these two counties in an effort to encourage and support entrepreneurship and to encourage the revitalization and preserve the vitality and character of main streets throughout the counties.

Additionally, the Landmark Society of Western New York is active in the region in promoting and advocating for the preservation of historic village main streets and offers resources for communities and individuals interested in maintaining historically significant structures and properties.

Chapter 5 - Development Actions, Efforts and 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 2006 and 2007 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 telecommunications study 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 Finger Lakes 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 by Finger Lakes 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 Finger Lakes Wired Team heavily endorses the development of a regional telecommunications infrastructure plan.

Another project that the Finger Lakes 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 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	Infrastructure Regional Development Plan	Federal, State, Local	\$300,000	2007-2009
GFL-2	Regional Economic Development Analysis and Benchmarking Study	Federal, State, Local, etc.	\$250,000	2007-2009

5.2 Genesee County



Genesee County and, by a recent 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 2.2 million people – this broader upstate New York region rivals the size, capabilities and capacity of the Pittsburgh MSA. Given Genesee County’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 two 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 fastest growing “Micropolitan” community in the Northeast for the second straight year in terms of economic development projects as ranked by Site Selection Magazine. This is the third year in a row that the Batavia Micropolitan area (Genesee County) has ranked in the top ten 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 three interchange exits within the county located along one of the states most active commercial highways - the New York State Thruway (I-90); an ample and well educated workforce; abundant and cost effective

real estate including three shovel-ready corporate/industrial parks along with two new Build Now NY business parks breaking ground during 2007; 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 the Genesee Community College, recently ranked 17th nationally in terms of growth; a diverse array of entertainment (Darien Lake theme park) and attractions (Niagara Falls, professional sports teams) available regionally and locally and very affordable housing. These competitive strengths contribute to enabling a high quality of life for Genesee County 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 in the upstate New York region. The community has become galvanized and focused on increasing the amount of economic development activity county wide. As such, the Genesee County economic development strategic plan was crafted and implemented in 2003. The county is now in the final year of implementing the strategic plan. Genesee County, the Batavia Micropolitan area, has experienced record breaking economic development growth in terms of projects, capital investment and job creation commitments including beating its five year growth oriented strategic plan in less than four years.

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 the community enabling a high quality of life for 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 the community as a "business-friendly growth-oriented" community offering a vibrant quality of life in which to live, work and play.

Mission: Genesee County's community-based economic development mission focuses on catalyzing community economic success through growth, expansion and retention of the existing base of businesses as well as marketing the 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 five year period from 2003 through 2007, Genesee County's economic development strategy, defined through its strategic imperatives, will:

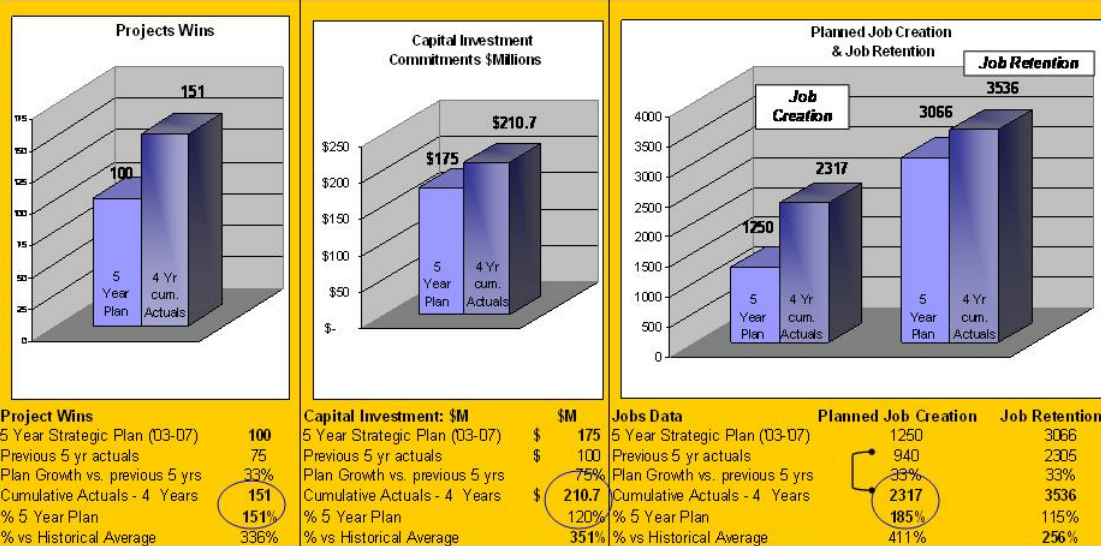
1. Secure \$175 million in capital investment county-wide (75% annual growth)
2. Participate in 100 economic development projects supporting the expansion and retention of the existing business base and new business attractions (33% growth)
3. Job creation of 1,250 jobs (33% increase)
4. Continue active economic development and marketing programs
 - Empire Zone consulting and implementation
 - Business retention and 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 three 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 results are illustrated below:

Genesee County Economic Development Focus Group Scorecard: 4 Years of 5



- GCEDC breaks 5 year plan across all scorecard categories in < 4 years!



As one can see by the scorecard, strong economic development success continues throughout Genesee County and the Batavia Micropolitan area. The county's five year growth oriented plan was surpassed in less than four years and the brisk pace of economic development activity continues.

Genesee County's priority projects, enabling the county's economic development strategic plan and associated strategic imperatives, are listed in Table 24.

Table 24 - Genesee County/ Batavia Micropolitan Priorities

Priority Number	Proposed Project	Funding Sources	Total	Start- Finish Dates
G-1	Develop shovel-ready Ag-Mfg Park	Federal, State, Local	\$5 Million	2006-2011
G-2	The Upstate Med-Tech Project: Develop a Regional Med-Tech Business Park and Commercialization Center	Federal, State, Local	Park: \$1.5-2.0M Commercialization Center: \$3-\$4 Million	2006-2011
G-3	Develop Mega-Site Industrial Park supporting large scale Advanced Mfg	Federal, State, Local	\$20-\$25 Million	2007-2012
G-4	Develop Pembroke Commerce Park @I90 exit 48A	Federal, State, Local	\$1.5-2.0 Million	2005-2010
G-5	Re-development of the Batavia Downtown Corridor (aging industrial area)	Federal, State, Local	\$5.0 ⁺ Million	2007-2012
G-6	Develop Lower Cost of Power Solution(s): Cogen, Alt Energy to address high cost of power issues for business	Federal, State, Local	TBD	2008-2013

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 Livingston County-owned industrial sites in Avon and Dansville as Build Now - NY "shovel ready" sites (see section 4.7). 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 NY will soon complete construction of 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 at 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 has completed its Agriculture and Farmland Protection Plan which identifies the need to strengthen agricultural-based economic development.

The Caledonia Commodity Resource Corporation (CRC) is a multi-modal feed and fertilizer transload facility that exemplifies the changing face of agribusiness throughout Livingston County. The food processing and distribution industry is clustered in the northern portion of the county where infrastructure exists to meet its unique requirements. An ethanol plant is proposed to be co-located at the CRC facility. This \$80 million facility is undergoing the permitting process.

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 also been awarded a New York State Office for Small Cities grant to assist small businesses throughout the county and to further downtown revitalization in the Villages of Livonia, Nunda, Mt. Morris and Dansville. An application for continued funding of this program, which includes an expansion of the program services to the Villages of Lima, Avon and Caledonia, has been made to the Office for Small Cities. This application includes recapitalization of the Revolving Loan Fund.

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 had the potential to cripple the community of Dansville and therefore redevelopment of the 56 acre site has been a priority. In 2006, Livingston Properties purchased the facility which is anticipated to house several small manufacturing operations and to create 300 new jobs.

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.

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 both 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. The center includes a transitional care unit, adult day health care, hospice, memory care and bariatric care units.

Modern health care, however, 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.

Livingston County's priority projects are listed in Table 25.

Table 25 - Livingston County Priorities				
Priority Number	Proposed Project	Funding Sources	Total	Start- Finish Dates
L-1	Small Business Incubator	EDA, State, Federal	TBD	2007-2008
L-2	Completion of Infrastructure at Crossroads Commerce Park, Avon	EDA, DOT, County	\$1 Million	2007
L-3	Multi-Tenant building at Dansville Industrial Park	EDA, New York State, County, Private	\$2 Million	2007-2008
L-4	Multi-Tenant building at Mt. Morris Industrial Park	EDA, New York State, County, Private	\$2 million	2006-2007
L-5	Broadband Technology	TBD	TBD	2007-2008

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, and call centers.

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 2006 performance included 132 projects projected to add 1,850 new jobs, retaining 9,688 jobs with a total investment of \$374 million. Over the past three years, the county has worked with over 380 companies who have invested over \$1 billion in plant and equipment which will result in the creation of over 6,000 jobs and retain over 28,000 jobs.

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. The county has five contiguous sites that are in the Empire Zone. 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 2005, Monroe County enhanced its 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 county invested an additional \$300,000 in GRE which will allow the group to market outside of the community. GRE will be attending thirty tradeshow in 2007 and hosting a site selector event at Corenet. The primary focus of the GRE is 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 Activities and 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 the University of Rochester 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 the region's future economic successes. Monroe County recently hosted the first Rochester College Presidents summit which addressed the university community and business development opportunities throughout Monroe County. A new website has been developed by the Rochester Area Colleges, a consortium of eighteen area colleges, which links businesses to college services, programs, research expertise, and educational opportunities. This website is www.biz2edu.com.

Monroe County Executive Maggie Brooks announced the results of the inaugural class for The Entrepreneurs Network (TEN), an organization that offers 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 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. TEN offered participants a six month program serving a regional level including Buffalo, Rochester, Syracuse and Ithaca. The County of Monroe Industrial Development Agency (COMIDA) provided the seed funds for the first three years of TEN along with WIRED funding. Two of the eighteen companies received venture capital as a result of participating in TEN. The second class started in

November and includes sixteen participants representing thirteen regional early stage, high tech companies.

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 New York State 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.

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, etc.	\$230 million	2006-2009

5.5 City of Rochester

Due to the New York State 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 of Rochester place a strain on the city'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 Genesee-Finger Lakes 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.

PORT of Rochester Redevelopment

The area around the PORT of Rochester provides a unique market for investment due to its close proximity to the major waterways of Lake Ontario and the Genesee River. As proposed in the city's master plan, the economic development of the Charlotte Community will be a medium density mixed-use development based on the waterfront and marina components that the area provides. 300-700 residential units are estimated to be constructed, supported by 55,800 sq. ft. of retail development and 6,000 sq. ft. of office space. Critical to this development is the creation of a marina by the city. The combination lease and for sale units, on-site parking and underground parking will provide the marketplace with an attractive destination. The residential units can support some retail and commercial establishments to also support the marina environment. Total project costs are estimated at \$146,697,460.

Midtown Plaza

The Midtown Plaza Complex consists of six buildings engrossing 1,477,056 sq. ft. The series of buildings were initially constructed in 1901 with construction continuing into the early 1970s. The existing owner intends to dispose of the property; therefore the city is in the process of evaluating how it may best protect/utilize this vital structure for the benefit of public interest. Due to the nature of its early construction, there is a significant remediation requirement to bring the architectural components of the property up to present standards. In addition, asbestos is present in the structural beams and columns in over 70% of the complex. Most of the mechanical and electrical equipment and systems are original and have reached their useful life. Therefore, the conceptual cost to abate and upgrade is estimated at \$141,275,272. In addition, demolition costs have been estimated at \$54,784,454.

88 Elm Street Building

This 80,000 sq. ft. building is currently vacant and secured from entry due to asbestos and environmental remediation issues. A complete environmental clean up estimated at

\$1,000,000 and renovation estimated at \$8,000,000 is required to bring the property up to present standards.

Photech Site

Located at 1000 Driving Park, the former Photech site is a 12.5 acre parcel of land that is currently owned by the city. This site was a former photographic film and photographic paper manufacturing facility. Manufacturing at the former Photech site ceased operation in the early 1990s, and the city acquired the Photech site through tax foreclosure in 1997. The documented liabilities and potentially significant environmental remediation costs have discouraged redevelopment of the property. In December 2006 the city submitted a grant application to the USEPA for funding of environmental cleanup of the Photech site. The city is also in the process of submitting an environmental cleanup grant application to the New York State Department of Environmental Conservation (NYSDEC) for approximately \$3,101,979 based on a total estimated project cost of approximately \$4,506,875. It is anticipated that the former Photech site will be redeveloped as an industrial park which will subsequently stimulate private sector investment and new economic development. Redevelopment as an industrial park will require city expenditures for design, grading, and infrastructure. Estimated costs for the potential new investment in the redevelopment of the Photech site range from \$10 to \$20 million. Assuming that new buildings will occupy between nine and ten acres it is anticipated that the Photech Site may result in the creation of 180 to 200 new jobs.

Vacuum Oil Site

The Vacuum Oil site was a petroleum refinery and bulk storage facility approximately 24- acres in size and was located on the western bank of the Genesee River. The Vacuum Oil facility operated from the 1860s through the 1930s, and contained up to 135 storage tanks and process vessels and processed up to 4 million gallons of crude oil in late 1800s. While a public trailway is located adjacent to the Genesee River, a significant portion of the former Vacuum Oil site contains vacant and underutilized land that is suspected of being contaminated with petroleum and other hazardous substances. In December 2006 the city submitted a grant application to the USEPA for funding of up to \$200,000 to inventory, characterize, assess, and conduct planning and community involvement related to brownfield sites contaminated by hazardous substances, pollutants, or contaminants. In May 2006 the city also submitted a grant application to the NYSDEC for approximately \$239,000 to perform a Nomination Study which will enable the city to begin a community-based study to evaluate potential brownfield redevelopment strategies. It is anticipated that investment in strategic sites, together with improved recreational access to the Genesee River waterfront and associated public trails can serve as catalysts to improve public safety and drive economic development.

666 Driving Park/ DuPont site

This is an approximately 10-acre site located on Driving Park about 1/2 mile east of Mt. Read Boulevard. The site is an industrial site with some contamination, although all building structures have been removed. The city is attempting to find a suitable industrial

or recreational re-use for the site and expects to work with DuPont on the remaining remediation work required. The expected timeframe for redevelopment is 24-36 months. The cost of remediation is unknown at this point.

Emerson Street Landfill Area - McCrackenville/Emerson Street

This is an area in the former Emerson Street landfill located on the north side of Emerson Street. There are 22 acres that are under consideration for industrial development, to support existing businesses in the area. The city is currently working with these businesses to assist in the redevelopment of this land. The expected completion date is 24-36 months. Project costs are unknown at this point.

Eastman Dental Building

The Eastman Dental Building is a historical preservation building located at the corner of East Avenue and Alexander Street. Asbestos removal from the building is estimated at \$250,000. The total remediation cost is estimated at \$500,000.

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	PORT of Rochester Redevelopment	To Be Determined	\$146 million	TBD
R-2	Midtown Plaza	To Be Determined	\$141 million	TBD
R-3	88 Elm Street building	To Be Determined	\$9 Million	TBD
R-4	Photech site	EDA, USEPA, NYSDEC	\$10-\$20 million	2007-TBD
R-5	Vacuum Oil site	EDA, USEPA, NYSDEC	To Be Determined	2007-TBD
R-6	666 Driving Park/DuPont site	To Be Determined	To Be Determined	2007-2009
R-7	Emerson Street landfill area	To Be Determined	To Be Determined	2007-2009
R-8	Eastman Dental building	To Be Determined	To Be Determined	2007-TBD

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 plan will again be updated in 2008, with preparation work for the

update ongoing in 2007. The 2004 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 the 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.

Also assisting in developing and supporting the food, agriculture and biotechnology industries is the Finger Lakes New Knowledge Network. Funded through the National Science Foundation, the project is a grant program intended to drive economic development in the G-FL region by enticing the region's expert resources in the fields of food, agriculture and biotechnology to partner on collaborative projects.

The Finger Lakes New Knowledge Network grant, of which Ontario County is a partner, aims to stimulate new business generation by combining the expertise of scientists in the food, agriculture and biotechnology fields to create new cutting edge cross-functional technologies and products. The grant aims to stimulate and facilitate new businesses to grow and settle in the region, creating economic growth in the food, agriculture and biotechnology areas, building upon the activities already underway in these fields at the Cornell Technology Farm.

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.

One possible component of "Ontario County Technology Network" is a project which may include 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. It is anticipated that the sewer line extension part of this project could 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, are likely to 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 this component is \$9.2 million and over half of the funding has been committed by a private sector firm. The final implementation details of this component, however, have yet to be finalized.

Another element of the 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 is 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.

“Ontario County Technology Network” will better equip both Ontario County and the G-FL 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

Orleans County encompasses 396 square miles with a population of 44,000. Historically dominated by farming and agribusiness, the local economy today has a growing government service sector and a sizable manufacturing component.

Of note in 2006, was the announcement by Western New York Energy, LLC that they would construct New York State's first dry-mill ethanol plant in the Town of Shelby. The project is expected to generate fifty jobs on-site and upwards of an additional 500 ancillary jobs. As construction finalizes, the plant is expected to be in operation by late 2007. In addition to the fuel generated by the plant, it is also anticipated that the carbon dioxide by-product produced will be captured, bottled and sold by an associated firm.

Additionally, the Olde Pickle Factory, converted from a former Fisher-Price factory, is a multi-tenant manufacturing/warehousing facility. As a former factory, low cost hydropower is available from the New York Power Authority for manufacturing uses.

To further additional economic development, Orleans County supports the extension of Route 531 to the Orleans County border with a long-range goal of having Route 531 cross Orleans and Niagara Counties to I-190 in the western edge of Niagara County. Businesses in all sectors of the Orleans County economy have articulated a need for better transportation connectivity to assist in attracting new employees and in the transportation of goods.

Target Development Areas

Orleans County has identified seven target development areas that correspond with its approved New York State Empire Zone clusters. Targeted industries are those that have historically generated significant employment and investment levels and those businesses with growth potential that are committed to local investment in new technology and/or production capacity.

Area I – Medina West End Industrial Park- 213 acres

This area encompasses a commercial district dominated by a 93,000 square foot vacant shopping plaza with parking for over 700 vehicles located on a major state highway. Additional acreage in Area 1 is zoned for industrial and residential uses.

Medina is the largest population center in the county, offering an immediate employee pool for companies. The continued development and redevelopment of this area is a logical and strategic fit due its many strengths and resources, including a large employee base, extensive existing infrastructure, and a mixture of buildings for reuse and open land for new construction.

Assets:

- Hydropower availability
- High volume water capacity, sewer
- Rail access
- High-speed Internet

Targeted Business Sectors:

- Data Centers

- Food processing/packaging
- Back office
- Canadian manufacturing subsidiaries

Area 2 – Medina Business Park and Surrounding Acreage - 516 acres

Included in Area 2 is an over 120 acre business park owned by the County of Orleans IDA. A “virtual building” project, which will put in place permitting and zoning allowing fast track building in the Medina Business Park is planned for this development area.

Assets:

- Hydropower availability
- High volume water capacity, sewer
- Rail access
- High-speed Internet

Targeted Business Sectors:

- Data centers
- Agricultural users and byproducts
- Ethanol and biofuels production
- Canadian manufacturing subsidiaries

Area 3 – Village of Lyndonville /Town of Yates - 58 acres

Area 3 is located in a more rural area of Orleans County; it is, however, strategically positioned within the county. Several vacant parcels in this area are zoned for industrial development and have public water and sewer.

As this area is largely surrounded by agricultural land, it is well suited for food processing or agribusiness uses, reducing the travel necessary for the raw materials. The area is positioned to take advantage of the agricultural areas surrounding the site, while still being located within the area serviced by public utilities.

Assets:

- Hydropower availability
- Sewer and sand filtered public water
- High-speed Internet

Targeted Business Sectors:

- Agricultural users and byproducts
- Canadian manufacturing subsidiaries

Area 4 - Village of Albion, Albion Industrial Center - 20 acres

Albion is home to one of Orleans County's most successful economic development projects, Washington Mutual. This area encompasses the Albion Industrial Complex, which includes several building complexes including the Washington Mutual 155,000 square foot building, a 70,000 square foot warehouse and a 60,000 square feet manufacturing building, which houses three new start-up businesses.

This area is adjacent to a rail line and is located only four miles from Route 104 and affords easy access to the New York State Thruway. It is on Route 31, a major arterial in Albion and is zoned for industrial uses.

This area was chosen as a target development area for its reuse potential, access to population area, opportunity to build on recent successes and for its existing infrastructure and economic development possibilities. It is also in close proximity to the county and state job development center and the Genesee Community College satellite campus.

The complex has excellent dock capabilities, high ceilings, easy access and extensive parking, all making the facility ideal for warehousing or manufacturing. Additionally, the access to a large labor pool and inexpensive lease rates make this complex well suited as a "back office" operation or call center.

Assets:

- Village water and sewer
- Located on main thoroughfare
- Cost effective space
- High-speed Internet
- Rail access

Targeted Business Sectors:

- Back office operations
- Warehouse/distribution
- Manufacturing, assembly

Area 5 - Albion Business Park /St. Gobain - 72 Acres

The Business Park portion of this site contains approximately forty acres of undeveloped land owned by the County of Orleans IDA. The balance of the site is owned and operated by St. Gobain, a textile manufacturer. This area is four miles from NY Route 104 and also has easy access to the New York State Thruway. It is on Route 31, a major arterial in Albion and is zoned for industrial uses.

Assets:

- "Corporate" setting
- Public water and sewer

- High-speed Internet

Targeted Business Sectors:

- Primary and secondary health care operations
- Back office operations
- Corporate offices

Area 6 - Holley Business Park – 226 Acres

Located in the Village of Holley near the Monroe County line, the Holley Business Park is strategically positioned for industries with ties to Monroe County that are seeking a rural setting with a low cost of business. This area is adjacent to a rail line and is four miles to Route 104 with easy access to the New York State Thruway. It is on Route 31, a major arterial in Holley and is zoned for industrial uses.

Assets:

- Municipal power available at \$0.013KW commodity rate (lowest in the state)
- Close proximity to Monroe County
- Rail service
- High-speed Internet

Targeted Business Sectors:

- Back office operations
- Warehouse/distribution
- Manufacturing, assembly

Area 7 – Albion NY Route 98 - 169 acres

This area represents a portion of a major north/south transportation corridor connecting the Thruway exit in Genesee County through the center of Orleans County to Route 104. The current comprehensive plan for the Town of Albion calls for the future land use of this area to be light industrial and general commercial.

The target businesses for this area are small start-up businesses that cannot bear the cost of subdividing large parcels or of competing with businesses that can most benefit from the industrial park areas. Since a major goal of the Orleans Economic Development Agency continues to be small business start-ups, this location is well suited to achieve this goal. The parcel sizes are manageable, there is existing infrastructure, close proximity to the Thruway, property zoned lands, and high visibility to people traveling into the region.

Assets:

- Zoned for industrial and commercial uses
- Well traveled thoroughfare
- High-speed Internet

Targeted Business Sectors:

- Light manufacturing, fabrication, assembly
- Warehouse/distribution
- Back office
- Commercial
- Hotels
- Tourism-oriented businesses

Business Assistance

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 and 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.

Orleans County provides assistance to businesses through a variety of programs including:

- New York State Empire Zone Tax Credits and Exemptions
- Orleans Revolving Loan Fund
- Industrial Revenue Bond Financing
- Employee Training
- Low Interest Loans
- Loan Guarantee and Interest Subsidies
- Payments in Lieu of Property Taxes (PILOT)
- Sales and Use Tax Abatement on Equipment and Material Purchases
- Mortgage Recording Tax Abatement
- Buy Local Incentive
- Microenterprise Assistance (Entrepreneur Assistance)

Orleans County's priority projects are listed in Table 29.

Table 29 - Orleans County Priorities				
Priority Number	Proposed Project	Funding Sources	Total	Start- Finish Dates
OR-1	Albion Business Park Development	EDA, NY State, Orleans County	\$100,000	2007
OR-2	Upgrade Holley Business Park Infrastructure	To Be Determined	\$1,100,000	2007
OR-3	Virtual Building- Medina Park	To Be Determined	\$50,000	2007

5.8 Seneca County

Seneca Army Depot

A focal point of the Seneca County IDA's efforts over the past 11 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 its public transportation operations 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 ordnance. 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 ordnance. 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 implementing an update to the original Base Reuse Plan. 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 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 New York State Thruway and 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 in developing a renewable energy industrial park that will utilize low cost energy being produced by the processing of methane from the landfill. Construction is now underway on a facility housing a number of electric generators that will be fueled by methane. 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 IDA will use PILOT increment financing to move a major gas line as part of this project.

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 forty acre Deer Run Corporate Park in Seneca Falls and is expected to attract at least two firms to the park over the next year. The park's first tenant, The Blade Shop, just completed construction on a new manufacturing facility that will produce industrial mixing blades. 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 and bio-mass facility that will require thousands of acres of willow trees and switch grass. Currently, environmental and financial reviews are underway for this project. Construction is expected to start by fall 2007 at the earliest. This \$135 million facility is expected to generate some 150 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. For example, the county and the IDA are assisting the Seneca Knit Development Development Corp. in rehabilitating the former Seneca Knit Building into a new home for the National Women's Hall of Fame along with an adjacent hotel abutting the Seneca-Cayuga Canal.

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 55 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.

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 10 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	2008-2009
S-2	Micro-Enterprise Program	EDA/HUD	\$400,000	2007-2010
S-3	Multi-Tenant Speculation Building/ Deer Run Park	EDA, local	\$1 Million	2007
S-4	Infrastructure Improvements at the Seneca Army Depot – water, sewer, roads, rail and drainage	EDA, New York State	\$12 Million	2007-2012
S-5	Demolition of derelict and unneeded buildings and facilities at the Seneca Army Depot	EDA, New York State	\$5.5 Million	2007-2009
S-6	Electrical Upgrade – Seneca Army Depot	EDA	\$8.0 Million	2007-2007
S-7	Seneca County Strategic Plan	EDA/Seneca County	\$140,000	2007-2008

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.

Training for a stable, skilled workforce is a high priority for new and expanding industrial development. The Wayne/Finger Lakes BOCES and Finger Lakes Community College (FLCC) continue to offer specific training skills. Monroe Community College has a satellite at the Wayne Central School in the Town of Ontario. FLCC has established the Wayne County Campus Center in the Silver Hills Technology Park, and began classes in September 2006. The Campus Center's 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 Industrial Sustainability Park for the study, use and development of alternative energy resources for industry.

New York State 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 four 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 County IDA 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.

In autumn of 2006 the Wayne County IDA obtained acreage in the Town of Ontario, contiguous to the industry model mentioned above. This site is currently being

developed as the hub for a system of WISP pods across the county. A sustainable energy industrial park would position Wayne County as a leader in the field of innovative economic development solutions. This project will 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 this 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. The Wayne County IDA, 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, continue to create 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.

In December 2006, Reckitt & Benckiser announced they would be ceasing operations in New York State by the end of the 2007. Improvements to the water system in the Wolcott area are critical to replacing the jobs that will be lost when Reckitt & Benckiser leaves and assuring the facilities currently underserved are provided with sufficient levels of water for drinking, processing and fire suppression.

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 on the incomplete Dean Parkway, an access road intersecting 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, Wayne County and the WISP located in Ontario are currently finalizing construction of the first phase- construction of the Timothy Lane Phase I- but are seeking funding for the completion of the project discussed above. With both the optics cluster at Beh Park and the WISP located in the area noted above, the road extension and rail crossing will leverage more available industrial and commercial land without harming the residential quality of life and facilitate the access issues off of Route 104 and across the rail into this area.

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.

Wayne County is home to the Williamson-Sodus Airport in the Town of Sodus. For many years it has served as an overflow site for the Rochester International Airport, should such a facility be needed. With the ease of private flying in the industry sector, there is support for expanding the airport to serve more and larger private plans. Financing for engineering, acquisition of land and construction will be necessary to move this forward.

One of the infrastructure additions prioritized, repeatedly, for transportation access for industry and tourism, 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 totaling \$1,020,000 have been secured for this project by Senator Michael Nozzolio, but a funding gap of over \$1 million 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 complete; led by the Wayne County IDA, the Empire Zone Administration Board and the Wayne Economic Development Corporation, with Wayne County Board of Supervisors support, the plan was adopted by the Wayne County Board of Supervisors in November 2006.

One strategic plan priority is 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, as such, the expectation is that upgrades 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	Funding Sources	Total	Start- Finish Dates
WA-1	Wayne Industrial Sustainability Park and pod infrastructure improvements	Federal, State, IDA, Private	\$2.5 Million	2007-2008
WA-2	Water Improvements Wolcott-WC NE Quadrant	Federal, State, Private	\$3.7 Million	2007-2008
WA-3	Engineering for and Phase I Implementation of Build Now NY standards in Industrial Parks	To Be Determined, but mix of State, Federal and local	\$1.2 million	2007-2009
WA-4	Industrial Road-Town of Ontario Road Extension for Clyde Industrial Park	To Be Determined	\$5 Million	2007-2008
WA-5	Amtrak Station- Lyons	Multiple	\$1.5 Million	2007-2009

5.10 Wyoming County

During 2005 and 2006, 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 its efforts on the challenging task of rebuilding and diversifying the local economy.

The economic vitality of the county is closely tied to state and national business conditions that little control can be exerted over at the county level. 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 Wyoming County 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.
- Wyoming County received Empire Zone designation in 2006 and the county has established its Zone Administrative Board and is actively promoting the Empire Zone program.
- Wyoming County has also been awarded economic development grants for two specific projects through the New York State Governor's Office for Small Cities.

After extremely challenging years in 2002 and 2003 because of much lower milk prices, 2004 saw a much needed rebound that continued into 2005 and 2006. 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 United States. Farming and agricultural services employ about 1,000 workers which ranks third among all New York State counties.

The big question going into 2007 is whether the national and upstate New York economies will continue to grow. 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 County and other rural counties is that the service and technology based industries that drove the economic expansion of recent years saw nearly all of the 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. 70 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. To this end, the revitalization of downtown commercial areas is a continued priority for the county.

A significant industrial project in Wyoming County is at the former Westinghouse site in the Town of Attica, where Hillcrest Industries manufactures a sandblasting medium. Additionally, this product is also utilized as filler in the manufacture of roofing shingles. The site is located in an Empire Zone. Although Hillcrest has entered into a mutually beneficial relationship with a major roofing manufacturer, inadequate rail access causes the product to be loaded a half mile from the plant. The Wyoming County IDA is working with the New York State Department of Transportation and other agencies to provide funding to create a spur off the existing Norfolk Southern rail line into the site to facilitate more efficient and effective transport of materials. Another firm has also expressed interest in locating at the site to operate a similar sandblasting business, possibly creating upwards of sixty new jobs. The creation of a new rail spur would certainly significantly increase the attractiveness of the site. However, a \$170,000 funding gap still exists in the rail improvement project.

Construction is expected to be underway in 2007 on a building at the Arcade Business Park. Water and wastewater have already been extended to the site, which is owned by the Wyoming County IDA.

A lack of infrastructure such as municipal water and sewer, access to an interstate highway, and inadequate telecommunication services, however, are still 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	2006-2008
WY-2	Westinghouse Site Improvements – Attica	US EPA, NYS DEC, Local	\$1.5 Million	2006-2008
WY-3	Perry Business & Technology Park	EDA, USDA, Local	\$2.2 Million	2007-2008
WY-4	County Telecommunications Improvements	TBD	TBD	2007-2008
WY-5	Business Incubator Facility	USDA, GOSC, Local	\$1.0 Million	2007-2008

5.11 Yates County

Yates County has developed a diverse economic base, with no single dominant sector. High-tech and the 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 County 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 through Time Warner 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 the airport's attractiveness for long-distance corporate travel.

2006 saw the continued development of commercial projects within Yates County. These projects include retail, tourism-related businesses and other commercial properties, such as the re-location of Polmanteer's Automotive Service Center in order to facilitate a new Walgreen's Drugs in Penn Yan and improved tenancy in Lake Street Plaza. Also, a formerly vacant 15,000 square foot industrial building was occupied by a chemical manufacturing firm. Many of these projects represent highly visible improvements in the gateways to Penn Yan and expanding investment in the area.

The appeal of the Finger Lakes region continued to drive tourism growth in Yates County in 2006. Tourism has developed as the leading economic engine for the county, bringing visitors and spending to the area. The 2005 opening of the Best Western Vineyard Inn &

Suites in downtown Penn Yan has added much needed lodging and has already obtained occupancy rates well above predicted levels.

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 industries are now considered the largest employment sector in Yates County, according to the New York State 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 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, adjacent to 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 others, 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 2007. The creation of a suitable development plan is a primary objective of an inter-municipal task force created in 2006. This Waterfront Revitalization

Committee has completed an RFP process and selected a consultant to lead the effort and work should begin in early 2007 on the public portion of the process.

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 twenty-five acres remaining for development in Horizon Business Park. In late 2006, CASP, LLC, a specialty food packaging firm, announced a major expansion project to their existing facility. Additional assistance may soon be required to improve access to the Park with the addition of turning lanes and a traffic control device. The county is working with the Industrial Access Phase II program to improve access to the business park.

During 2006, the Yates County IDA also assisted in a \$42 million pollution control upgrade project at AES Greenidge, a coal burning electrical generation facility. Several other projects begun in 2006 are scheduled for completion during 2007, including a project in conjunction with Keuka College and NYSERDA and capital improvements to the Keuka Business Park, in an effort to attract additional tenants to help offset the loss of one of the park's main tenants. Additionally, all available lots at the Penn Yan Industrial Park have been sold.

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.

Yates County's priority projects are shown in Table 33.

Table 33 - Yates County Priorities				
Priority Number	Proposed Project	Funding Sources	Total Project Cost	Dates
Y-1	Waterfront Redevelopment of Former Penn Yan Marine Facility	EPA, DEC, County	\$20,000,000	2007-2009
Y-2	Upgrade Himrod Water District & Ext. #1, Milo	NYS EFC DWSRF, , Local	\$ 2,850,000	2007-2008 (underway)
Y-3	Dundee Waste Water Treatment Plant Upgrades	NYS EFC CWSRF, NYS Small Cities, EDA	\$ 2,000,000	2007
Y-4	Yates County Airport Taxiway and Runway Expansion	FAA, NYS, County	\$ 4,000,000	2007-2008
Y-5	Branchport/West Bluff Drive Sewer District , Jerusalem	NYS EFC CWSRF	\$ 7,175,000	2007-2008
Y-6	Torrey Water District #1 , Torrey	NYS EFC DWSRF, USDA, EDA, Local	\$ 4,000,000	2007-2008
Y-7	Route 14 Eastern Corridor Water District	EDA, USDA, EFC, NYS Small Cities	\$15,700,000	2007-2009

Chapter 6 - 2006-2007 Goals, Strategies and Measures

6.1 Stakeholder Input Sessions

Three stakeholder input sessions were held throughout the G-FL region on March 28, 29 and 30, 2006 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 11 and 12, respectively.

6.2 Goals, Strategies and Measures

The goals, strategies, and measures were developed based on both the stakeholder input sessions and discussions held with the nine county Economic Development Departments/Industrial Development Agencies, Planning Departments and other various stakeholders. A copy of the notes from those meetings can be found in Appendix 13.

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 support GRE and the county Industrial Development Agencies • 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 Infrastructure Regional Development Plan • Development of a regional telecommunications inventory and assessment • Development of a regional water and sewer inventory and assessment tool 	<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 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 Finger Lakes Wired and the EDA • Continue to support Finger Lakes Wired through the work of the Governing Board, Operations Team and Implementation Teams 	<ul style="list-style-type: none"> • Correspondence between G/FLRPC and the EDA regarding Finger Lakes 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 Finger Lakes Wired	<ul style="list-style-type: none"> • G/FLRPC will continue to support the work of 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 Finger Lakes Wired
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 Finger Lakes Wired	<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 Finger Lakes Wired

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 efficient local governments	<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 water resources projects and programs 	<ul style="list-style-type: none"> • Distribution of the Protecting Water Resources through Local Regulation: A Guide for New York Municipalities publication • Implementation of watershed management plans • Implementation of Stormwater Phase II regulation
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 location	<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"> 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 Continue to support the work of the Western Erie Canal Alliance 	<ul style="list-style-type: none"> Implementation 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 – 2006-2007 Work Program

This section provides an overview of the activities that G/FLRPC will undertake in 2006-2007 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 commercialization and the 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 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 smart energy 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 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 to 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.
 - 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 and the State University of New York 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 include Preparing Village Main Streets for Planning and Optimizing Transportation Infrastructure
 - 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 and The Governor's Office of Small Cities.
 - 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.
 - Develop a regional blueway trails initiative

7.2 Professional Support

- G/FLRPC will continue to participate in Finger Lakes Wired 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 Finger Lakes Wired.
- 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.

- Assist local governments with economic and redevelopment planning
- 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 and 2007, 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

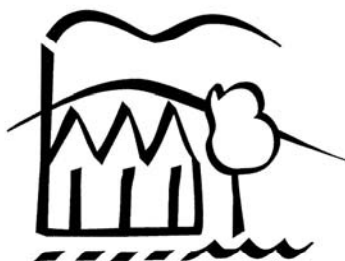
- Fill information and data services requests from citizens, businesses, not-for-profit organizations and public agencies so regional clients are equipped with the most recent and effective data.
- Maintain socio-economic and demographic data. An aspect of this service is a dedicated section of G/FLRPC's 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 and 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 14, 2007 G/FLRPC/ CEDS Review Committee/
Annual Meeting*

Genesee/Finger Lakes Regional Planning Council

Minutes

30TH Annual Meeting
Thursday, June 14, 2007
10:30 A.M.
Savannah Dhu
Pines Lodge
2500 Noble Road
Clyde, New York

Members Or
Alternates Present: Esther Leadley, Chair; Mary Pat Hancock; Charles Zambito; Brenda
Donohue; Robert Yull; Wayne Zyra; Linda Dobson; Kal Wysokowski;
Charles Thomas; Leslie Bamann; James Hoffman; David Lyon; Joe
Gozelski; Jerry Davis; Donald House

Ex-Officio
Members: David Woods; Julie Marshall; Paul Johnson; Kristen Hughes; Wayne Hale;
Harriett Haynes; Sharon Lilla; Richard Perrin

Presenters/
Guests: Linda Gillette, Savannah Dhu Community Relations Coordinator
Dawn Minemier; Lezlie Farrell (Gray Certified Public Accounting, P.C.)

Staff: David Zorn; Rudeen Armstrong; Joseph Bovenzi; Jayme Breschard; Daniel
Burton; Thomas Kicior; Brian Slack; Christopher Tortora

Interns: Michael Birkby; Andrew Stuart

1. **Call To Order:** The June 14th Annual Meeting was called to order at 10:45 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 meeting(s) had been mailed to all Council members:
 - Regional Council Meeting of March 8, 2007

As there were no corrections, additions, or deletions, the minutes were approved; motioned by Linda Dobson; Robert Yull seconded/carried unanimously.
3. **2006 Audit Review:** Dawn Minemier and Lezlie Farrell of Gray Certified Public Accounting, the Council's auditor for the period ending December 31, 2006 summarized the audit. They explained that the purpose of the audit is to provide an overall position of the Council, to examine federal programs compliance requirements, and follow-up on procedural recommendations. The auditors reported that the 2006 Audit was a 'clean audit', and that the Council was in good financial condition.

4. Financial Statement – 2007 Budget Amendment – Resolution #2007-3: Esther Leadley asked David Zorn to review the Council's Financial Statement for the period ending May 31, 2007. Dave noted that the statement reflected revenues and expenditures acquired to date. He requested that the following budget line items be amended:

	<u>Current</u>	<u>Amended</u>
Workman's Compensation	\$ 1,750	\$ 1,810
Contingency	\$228,889	\$228,829

Mary Pat Hancock moved approval of the budget amendment. Wayne Zyra seconded/carried unanimously.

5. 2008 Preliminary Budget: Dave reviewed comparison budgets for 2006, 2007 and 2008.

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

6. Status of Regional Revolving Loan Fund: Dave Zorn summarized the Council's Revolving Loan Fund's status report for the period ending May 31, 2007.

Laughlin Rigging's loan has been restructured, re-collateralized and reobligated.

Grizzly's Cutting has defaulted in loan payments. Staff is working with the owner who has promised to catch-up payments.

Approved Loan(s):

- Just In Time CNC Machining Company - \$75,000 Working Capital loan @ 4% for 6 years. The company manufactures jet engine component parts. (Monroe County) The Loan Review Committee and Executive Committee have approved the loan. Awaiting a closing date.
- DPI (Digital Printing, Inc.) - \$200,000 Working Capital Loan @ 4% for 6 years. The commercial printing company with both offset and digital printing presses is located in Monroe County. The RLF and Executive Committees have approved the loan. Awaiting a closing date.

Application(s):

- Gold Pride Press – \$200,000 Working Capital loan. The company designs and manufactures a variety of custom print related sales, marketing and packaging products (i.e. pocket folders, brochures, displays, CD/DVD holders and slide charts) (Monroe County).
- Northern Biodiesel – \$200,000 Working Capital loan @ 4% for 6 years. The company plans to start a biodiesel production facility in Ontario, New York (Wayne County) as an alternative energy choice to traditional diesel fuel. Awaiting approval of additional funds to be leveraged.

Resolution #2007-4 – RLF Administrative Charges

David Zorn asked the Committee to approve the transfer of \$7,581.59 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 2006 - May 31, 2007).

Wayne Zyra moved Resolution #2007-4. Charles Thomas seconded/carried unanimously.

7. Comprehensive Economic Development Strategy (CEDS) – Resolution #2007-5: 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.

Kal Wysokowski moved Resolution #2007-5. Linda Dobson seconded/carried unanimously.

8. Village of Pike Dissolution Study – Resolution #2007-6: The Village of Pike seeks the assistance of Council staff for local planning services including the development of a dissolution study. The contract amount is \$20,000 for the period of March 1, 2007 through February 28, 2008.

Joe Gozelski moved Resolution #2007-6. Brenda Donohue seconded/carried unanimously.

9. Marcus Whitman School District Enrollment Projections – Resolution #2007-7: The Marcus Whitman School District has requested the assistance of Council staff to assist in the development of school district enrollment projections. The contract amount is \$3,000 for the period of April 1, 2007 through September 30, 2007.

Robert Yull moved Resolution #2007-7. Wayne Zyra seconded/carried unanimously. Donald House abstained.

10. Town of Torrey Comprehensive Plan - Resolution #2007-8: The Town of Torrey seeks the assistance of Council staff for local planning services including the development of a Comprehensive Plan. The contract amount is \$22,000 for the period of May 1, 2007 through October 31, 2008.

Donald House moved Resolution #2007-8. Leslie Bamann seconded/carried unanimously.

11. Annual Report / Project Updates / Intergovernmental Projects Review: Davis Zorn presented the 2006-2007 Annual Report to the Committee briefly summarizing the Council's past and current years' accomplishments. He then summarized the Council's various programs and activities for the 2nd quarter of 2007 including the spring local government workshop and the latest listing of Intergovernmental Project Reviews.

12. Nominating Committee: Nominating Committee Report: Esther Leadley announced a slate of Council officers for 2007-2008. The floor was opened for additional nominations. Being none, Ms. Leadley moved to accept the presented slate of officers:

James Hoffman	Chair
Jerry Davis	Vice Chair
Jeffrey Adair	Treasurer

13. Other Business:

IDA State Legislation Bill No. A08703: Peg Churchill and Julie Marshall did an overview of Assembly Bill #A08703 and asked for approval of a Regional Planning Council Resolution 2007-9 which expresses opposition to the proposed legislation. She indicated that the proposed legislation would negatively affect County IDAs and suggested sending a support letter or resolution of opposition to the Governor, representatives of the State Assembly and Senate, the Economic Development Council, NYS Association of Counties, and the Empire State Development Corporation. Ms. Churchill provided the Council with a model resolution for reference.

Brenda Donohue made a motion to accept the model resolution as the Council's Resolution #2007-9. Mary Pat Hancock seconded/carried unanimously.

14. Presentation - Savannah Dhu (Linda Gillett, Community Relations Coordinator): The Savannah Dhu was established by Bob and Sue Congel in 1984 as a private, managed evergreen preserve that is located on the border of the Montezuma Wetlands area and is clearly the product of the love of the outdoors and environmental conservation. The 5,000 acre preserve includes abundant wildlife, ponds, lakes, marches and over 500,000 deciduous and evergreen trees. Savannah Dhu's mission of dedication to working with local schools and community to enhance youth learning opportunities can be seen throughout the preserve.

Next Regional Council Meeting

Thursday, September 13, 2007
10:30 A.M.

Radisson Hotel
175 Jefferson Road
Henrietta, New York

Ra

Appendix 4 –Minutes from the January 26, 2007 EDAC/RDC Meeting

ROCHESTER/FINGER LAKES REGIONAL DEVELOPMENT CORPORATION

MINUTES OF 1/26/2007

Present: Kal Wysokowski, Clyde Forbes, Steve Isaacs, Jim Whipple, Vicki Pratt, Glenn Cooke, Steve Griffin, Dave Zorn, Dan Burton, Ryan Snyder, Julie Marshall, and Dick Boerman.

Guests: Debbie Stendardi, RIT, Jim Cavanaro, Consultant, Jim Senall, GRE, and Lisa Canedo, GRE.

Call to Order: The meeting was called to order by President Steve Isaacs at 10:05 a.m. at the Fairport Electric Building in Fairport. Introductions were made around the table. Steve welcomed Dan Burton, the new Economic Development Specialist for the GFL RPC to the meeting and thanked Kal for hosting the event.

Biz2edu Presentation: Debbie Stendardi and Jim Cavanaro demonstrated the newly launched biz2edu.com web site and highlighted the information that can be accessed on the site. They requested RDC members to reach out to the business community with information on the site in order to create awareness and to encourage its use.

Approval of the Minutes: The minutes of the September 8, 2006 meeting were reviewed and a motion was made by Glenn, seconded by Julie, to accept the minutes as written. Approved.

Financial Report: The Treasurer's report was presented by Julie Marshall. She provided an update on dues payments, and a year-end budget report for 2006.

Loan Fund Report: Dick Boerman handed out copies of the current quarterly report prepared for Empire State Development for the period ending December 31, 2006. Dick reviewed several of the loans and provided updates on the situations. Dick reported there is now approximately \$400,000 in the loan fund available for lending, and encouraged the use of this fund to complement local RLF monies.

Revolving Loan Fund Request: Dick also introduced a new loan request from Just In Time CNC Machining for \$75,000, out of a total project cost of \$1,644,000. Dick circulated a summary of the project and the minutes of the Loan Review Committee meeting, where the requested was recommended. The RPC loan fund is also involved in the project. The company is relocating from Livingston County to Monroe County in order to best suit the needs of their largest customer. Following a discussion, a motion was made by Glenn Cooke, seconded by Steve Griffin, to approve the \$75,000 working capital loan for Just In Time CNC Machining. Carried.

NEW BUSINESS

2007 Proposed Budget: Julie Marshall presented a proposed budget for 2007. The recommendation was to keep the annual dues at \$300. Motion was made by Vicki Pratt, seconded by Clyde Forbes, to approve the 2007 budget as presented. Carried.

Election of 2007 Officers: Question was raised regarding the implications of the Public Authorities Accountability Act, and how it might affect the officers of the RDC. As a result, the election of officers was tabled until further research could be completed.

Sigma Business Model Validation Survey Update: Vicki provided an update on the modeling project intended to better identify local companies most likely to expand. Based on early data, analysis has revealed six key variables in predicting the likelihood of expansion and profiles have been developed for both expanding and contracting sectors. To date, 19 firm visits have taken place and predictors are averaging about 50% accuracy.

Program: Jim Senall, Business Development Manager at Greater Rochester Enterprise, made a presentation on Alternative Energy Development in the Finger Lake Region. The presentation examined several emerging technologies, including wind, solar, fuel cell and bio-fuel development. Revenues from alternative energy sectors are expected to grow from \$40M in 2005 to an estimated \$167B by 2015.

G/FL Regional Planning Council: GFL Director Dave Zorn once again introduced Dan Burton, the new Economic Development Specialist at the RPC. Dave also gave an update on the 2007 CEDS process, encouraging regional projects to be added to the CEDS list. Lastly, Dave discussed a regional approach to providing telecommunication services and the creation of a regional data base of infrastructure location and capacity.

NYSEG Marketing Program: Clyde Forbes announced a new \$10M economic development assistance program about to be introduced by NYSEG. Funds will be made available for infrastructure upgrades and rate discounts for qualifying projects.

Other Issues: Discussion included the potential for food & beverage processing in the region, difficulties and lack of cooperation with regional DOT offices on major projects and how we might leverage local winery products at national trade events to promote our quality of life in the Finger Lakes.

Future Meeting Dates & Topics: Consensus was reached that the second Friday of the month is a good day for quarterly meetings. A meeting with the new Upstate ESD Chief, Dan Gunderson, was selected as a target for the spring meeting. Vicki and Steve agreed to work on a meeting date and location, with a goal of mid-April.

Adjournment/Next Meeting: The meeting was adjourned at approximately 12:10 p.m. The next meeting of the RDC is planned for April, at the GRE offices, at which time we

will be inviting the new ESD Upstate Chairman Gunderson to meet with our group. Full arrangements to follow.

Respectfully submitted,

Steve Isaacs
Temporary Secretary

Appendix 5 – CEDS Stakeholder Meeting Participants and Dates, 2007

Table A-5 – CEDS Committee Input Meetings Participants and Dates, 2007		
Name	Organization and/or Affiliation	Meeting Date
Victoria Pratt	Greater Rochester Enterprise	January 23, 2007
Glenn Cooke	Seneca County Industrial Development Agency	January 30, 2007
Steven Issacs	Yates County Industrial Development Agency	January 30, 2007
Judy Seil	Monroe County Planning & Development	January 31, 2007
Michael Manikowski, Roberta Jordans	Ontario County Office of Economic Development	February 1, 2007
Nabil Nasr, James Anderson, Andrij Harlan	Rochester Institute of Technology, Center for Integrated Manufacturing Studies	February 5, 2007
Matthew Hurlbut	Finger Lakes Wired	February 6, 2007
Michael Heftka, Richard Tindell	Wyoming County Industrial Development Agency and Wyoming County Planning & Development	February 7, 2007
Jim Whipple	Orleans Economic Development Agency	February 7, 2007
Patrick Rountree, Julie Marshall	Livingston County Development Group	February 8, 2007
Margaret Churchill	Wayne Economic Development	February 20, 2007
Steven Hyde, Stephen Griffin, Steven Lockwood	Genesee County Economic Development Center	February 23, 2007

Appendix 6 - Major Industry Sectors Present in the G-FL Region

**Table A-6 – 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-6 – Major Industry Sectors, NAICS Code and Industry Subsectors Present in the G-FL Region (continued)

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
	493	Warehousing and Storage
Information	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
	519	Other Information Services
Finance and Insurance	522	Credit Intermediation & Related Activity
	523	Financial Investment & Related Activity
	524	Insurance Carriers & Related Activities
	525	Funds, Trusts & Other Financial Vehicles
Real Estate, Rental and Leasing	531	Real Estate
	532	Rental and Leasing Services
Professional and Technical Services	541	Professional and Technical Services

**Table A-6 – Major Industry Sectors, NAICS Code and
Industry Subsectors Present in the G-FL Region (continued)**

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 7 - Economic Indicators for the G-FL Region by Industry Subsector (2005)

Table A-7 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2005)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Crop Production	251	3,259	\$19,439	0.83	-648
Animal Production	144	2,110	\$27,464	1.25	421
Forestry and Logging	10	68	\$29,499	0.25	-205
Agriculture & Forestry Support Activity	35	429	\$24,531	0.34	-849
Mining (except Oil and Gas)	41	632	\$40,926	0.71	-253
Utilities	22	2,141	\$78,153	0.92	-180
Construction of Buildings	790	5,334	\$43,099	0.76	-1,729
Heavy and Civil Engineering Construction	122	1,910	\$48,562	0.48	-2,066
Specialty Trade Contractors	1,772	12,069	\$40,140	0.63	-7,200
Food Manufacturing	117	5,763	\$37,686	0.93	-450
Beverage & Tobacco Product Manufacturing	36	1,672	\$59,698	2.08	870
Textile Mills	7	266	\$42,257	0.28	-677
Textile Product Mills	17	293	\$29,547	0.40	-433
Apparel Manufacturing	14	925	\$31,165	0.82	-205
Wood Product Manufacturing	52	708	\$29,657	0.30	-1,635
Paper Manufacturing	34	1,781	\$42,841	0.87	-267
Printing and Related Support Activities	157	3,159	\$39,210	1.15	419
Petroleum & Coal Products Manufacturing	8	105	\$44,476	0.22	-368
Chemical Manufacturing	37	16,862	\$68,347	4.58	13,184
Plastics & Rubber Products Manufacturing	88	5,740	\$38,734	1.70	2,361
Nonmetallic Mineral Product Mfg	58	1,672	\$40,959	0.78	-459
Primary Metal Manufacturing	13	500	\$40,887	0.25	-1,464
Fabricated Metal Product Manufacturing	321	9,224	\$40,640	1.45	2,873
Machinery Manufacturing	297	16,220	\$63,367	3.35	11,385
Computer and Electronic Product Mfg	111	7,953	\$61,032	1.44	2,438
Electrical Equipment and Appliances	23	1,412	\$44,317	0.77	-433
Transportation Equipment Manufacturing	30	5,971	\$49,952	0.80	-1,526
Furniture and Related Product Mfg	53	797	\$32,868	0.33	-1,589
Miscellaneous Manufacturing	109	4,645	\$56,935	1.69	1,902
Merchant Wholesalers, Durable Goods	840	10,871	\$52,824	0.87	-1,639
Merchant Wholesalers, Nondurable Goods	321	5,281	\$50,891	0.62	-3,241
Electronic Markets and Agents/Brokers	433	2,123	\$57,614	0.69	-940
Motor Vehicle and Parts Dealers	518	7,853	\$36,326	0.98	-185
Furniture and Home Furnishings Stores	189	1,736	\$25,729	0.71	-698
Electronics and Appliance Stores	213	1,918	\$31,627	0.85	-346
Building Material & Garden Supply Stores	341	5,866	\$24,298	1.09	493
Food and Beverage Stores	608	17,625	\$16,821	1.49	5,771
Health and Personal Care Stores	275	3,299	\$26,695	0.83	-683
Gasoline Stations	411	3,354	\$16,838	0.92	-308
Clothing and Clothing Accessories Stores	472	4,806	\$14,254	0.80	-1,165
Sporting Goods/Hobby/Book/Music Stores	250	2,914	\$14,173	1.05	140
General Merchandise Stores	185	9,636	\$16,224	0.77	-2,868
Miscellaneous Store Retailers	417	3,104	\$15,856	0.80	-771
Nonstore Retailers	140	1,478	\$30,728	0.81	-352

Table A-7 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2005) (continued)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Air Transportation	15	269	\$38,990	0.13	-1,864
Truck Transportation	308	3,369	\$34,494	0.58	-2,459
Transit and Ground Passenger Transport	58	2,208	\$18,241	1.29	501
Pipeline Transportation	12	38	\$63,480	0.24	-121
Scenic and Sightseeing Transportation	6	32	\$19,083	0.28	-84
Support Activities for Transportation	67	733	\$33,594	0.32	-1,564
Couriers and Messengers	49	1,270	\$35,376	0.54	-1,104
Warehousing and Storage	49	1,345	\$29,609	0.55	-1,101
Publishing Industries	110	3,580	\$40,984	0.94	-226
Motion Picture & Sound Recording	55	611	\$17,266	0.38	-1,014
Broadcasting (except Internet)	24	1,020	\$40,952	0.75	-347
Telecommunications	103	4,885	\$62,120	1.16	678
ISPs, Search Portals, & Data Processing	70	1,106	\$55,461	0.69	-495
Other Information Services	43	278	\$14,825	1.33	69
Credit Intermediation & Related Activity	516	7,579	\$45,032	0.63	-4,364
Financial Investment & Related Activity	235	1,559	\$85,571	0.48	-1,723
Insurance Carriers & Related Activities	744	6,109	\$51,393	0.68	-2,838
Funds, Trusts & Other Financial Vehicles	10	65	\$44,346	0.17	-307
Real Estate	782	5,172	\$36,683	0.86	-868
Rental and Leasing Services	239	2,171	\$27,534	0.80	-537
Professional and Technical Services	2,571	24,231	\$48,601	0.83	-4,871
Management of Companies and Enterprises	170	10,870	\$77,535	1.49	3,563
Administrative and Support Services	1,181	23,604	\$25,838	0.72	-9,022
Waste Management and Remediation Service	80	1,305	\$42,581	0.93	-104
Educational Services	322	23,231	\$43,084	0.46	-27,754
Ambulatory Health Care Services	1,593	17,822	\$38,445	0.84	-3,453
Hospitals	16	23,361	\$37,677	1.06	1,322
Nursing and Residential Care Facilities	320	17,365	\$22,899	1.46	5,435
Social Assistance	633	12,784	\$20,608	1.46	4,035
Performing Arts and Spectator Sports	112	1,216	\$23,413	0.75	-402
Museums, Parks and Historical Sites	21	676	\$19,762	1.35	175
Amusement, Gambling & Recreation	348	6,029	\$14,455	1.07	403
Accommodation	159	3,699	\$17,682	0.49	-3,818
Food Services and Drinking Places	2,071	32,691	\$11,813	0.86	-5,338
Repair and Maintenance	830	4,546	\$28,400	0.88	-636
Personal and Laundry Services	681	4,823	\$18,908	0.90	-545
Membership Organizations & Associations	938	8,194	\$17,544	1.50	2,735
Private Households	372	617	\$14,485	0.29	-1,495
Federal Government	204	5,647	\$48,600	0.75	-1,913
State Government	95	14,262	\$50,218	1.51	4,810
Local Government	636	70,623	\$35,755	3.12	47,980
Unclassified	950	903	\$21,555	0.90	-102
Total, All Industries	28,180	547,382	\$37,132		
Total, All Private	27,245	449,961	\$36,357		

Source: Quarterly Census of Employment and Wages

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

Table A-8 – 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*	Location Quotient	Export Employment
Crop Production	267	2,944	\$20,434	1.23	541
Animal Production	147	1,934	\$24,716	2.24	1,071
Forestry and Logging	5	68	\$31,442	0.21	-262
Agriculture & Forestry Support Activity	41	557	\$22,448	0.41	-791
Oil and Gas Extraction	3	16	\$51,703	0.03	-517
Mining (except Oil and Gas)	44	404	\$43,267	0.42	-554
Utilities	16	2,483	\$77,645	0.97	-81
Construction of Buildings	761	4,947	\$41,742	0.71	-2,016
Heavy and Civil Engineering Construction	127	1,993	\$49,453	0.46	-2,340
Specialty Trade Contractors	1,792	13,049	\$40,247	0.73	-4,933
Food Manufacturing	121	6,214	\$35,789	0.94	-409
Beverage & Tobacco Product Manufacturing	22	1,685	\$51,496	1.91	802
Textile Mills	7	282	\$47,126	0.17	-1,332
Textile Product Mills	17	328	\$27,694	0.36	-595
Apparel Manufacturing	16	1,032	\$29,623	0.49	-1,087
Wood Product Manufacturing	56	837	\$27,248	0.32	-1,777
Paper Manufacturing	43	2,265	\$38,971	0.88	-314
Printing and Related Support Activities	170	3,468	\$41,610	1.01	28
Petroleum & Coal Products Manufacturing	22	173	\$54,311	0.33	-352
Chemical Manufacturing	51	24,344	\$65,072	5.82	20,164
Plastics & Rubber Products Manufacturing	104	7,346	\$36,778	1.81	3,287
Nonmetallic Mineral Product Manufacturing	67	2,329	\$43,291	0.99	-34
Primary Metal Manufacturing	11	525	\$47,663	0.20	-2,127
Fabricated Metal Product Manufacturing	340	11,100	\$39,771	1.49	3,626
Machinery Manufacturing	330	22,446	\$61,547	3.62	16,242
Computer and Electronic Product Manufacturing	107	9,912	\$60,740	1.28	2,151
Electrical Equipment and Appliances	25	1,749	\$39,519	0.69	-771
Transportation Equipment Manufacturing	31	7,817	\$58,596	0.89	-948
Furniture and Related Product Manufacturing	60	772	\$31,558	0.27	-2,127
Miscellaneous Manufacturing	111	5,550	\$51,524	1.78	2,424
Merchant Wholesalers, Durable Goods	968	12,302	\$52,842	0.89	-1,559
Merchant Wholesalers, Nondurable Goods	352	5,391	\$46,252	0.61	-3,411
Electronic Markets and Agents/Brokers	367	1,431	\$59,965	0.54	-1,202
Motor Vehicle and Parts Dealers	507	7,640	\$37,066	0.97	-233
Furniture and Home Furnishings Stores	206	1,845	\$27,506	0.80	-471
Electronics and Appliance Stores	225	1,945	\$36,784	0.81	-461
Building Material & Garden Supply Stores	345	5,406	\$25,134	1.11	535
Food and Beverage Stores	594	18,309	\$15,481	1.43	5,548
Health and Personal Care Stores	283	3,630	\$21,783	0.92	-325
Gasoline Stations	479	3,810	\$16,486	0.95	-180
Clothing and Clothing Accessories Stores	522	4,849	\$14,260	0.86	-784
Sporting Goods/Hobby/Book/Music Stores	254	2,877	\$14,458	0.99	-43
General Merchandise Stores	162	9,508	\$16,935	0.79	-2,515
Miscellaneous Store Retailers	480	3,351	\$17,031	0.78	-943
Nonstore Retailers	128	2,406	\$28,713	1.14	304

Table A-8 – 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*	Location Quotient	Export Employment
Air Transportation	13	377	\$50,506	0.14	-2,243
Truck Transportation	331	3,186	\$34,959	0.53	-2,807
Transit and Ground Passenger Transport	53	2,291	\$25,045	1.44	704
Pipeline Transportation	8	40	\$63,031	0.20	-156
Scenic and Sightseeing Transportation	7	35	\$19,558	0.30	-82
Support Activities for Transportation	66	687	\$29,917	0.30	-1,604
Couriers and Messengers	44	2,040	\$29,651	0.79	-544
Warehousing and Storage	44	677	\$30,904	0.31	-1,518
Publishing Industries	120	3,313	\$41,190	0.75	-1,098
Motion Picture & Sound Recording	69	994	\$13,933	0.61	-635
Broadcasting (except Internet)	25	980	\$40,635	0.67	-484
Internet Publishing and Broadcasting	5	90	\$48,204	0.42	-125
Telecommunications	102	5,443	\$80,995	1.01	61
ISPs, Search Portals, & Data Processing	95	1,823	\$51,126	0.84	-352
Other Information Services	41	293	\$13,894	1.49	96
Credit Intermediation & Related Activity	455	7,507	\$42,166	0.69	-3,357
Financial Investment & Related Activity	176	1,877	\$104,539	0.55	-1,554
Insurance Carriers & Related Activities	761	5,734	\$47,144	0.61	-3,733
Funds, Trusts & Other Financial Vehicles	11	72	\$45,787	0.20	-289
Real Estate	748	5,333	\$26,320	0.95	-262
Rental and Leasing Services	220	2,190	\$26,080	0.77	-654
Professional and Technical Services	2,497	23,941	\$50,466	0.83	-4,773
Management of Companies and Enterprises	131	10,948	\$69,387	1.43	3,290
Administrative and Support Services	1,135	25,562	\$22,985	0.77	-7,806
Waste Management and Remediation Service	70	1,223	\$39,070	0.92	-111
Educational Services	275	17,377	\$46,538	1.70	7,181
Ambulatory Health Care Services	1,528	18,254	\$34,015	0.99	-170
Hospitals	18	23,957	\$33,801	1.42	7,099
Nursing and Residential Care Facilities	270	14,333	\$23,291	1.30	3,319
Social Assistance	612	11,409	\$20,040	1.44	3,477
Performing Arts and Spectator Sports	125	1,108	\$28,919	0.68	-515
Museums, Parks and Historical Sites	20	747	\$18,570	1.59	276
Amusement, Gambling & Recreation	319	5,292	\$14,980	0.96	-229
Accommodation	143	4,571	\$18,419	0.57	-3,467
Food Services and Drinking Places	2,135	32,571	\$11,876	0.93	-2,343
Repair and Maintenance	776	4,063	\$29,506	0.77	-1,232
Personal and Laundry Services	684	4,292	\$18,750	0.81	-1,009
Membership Organizations & Associations	803	7,095	\$17,263	0.62	-4,346
Private Households	472	760	\$14,701	0.41	-1,089
Federal Government	191	5,463	\$46,815	0.45	-6,753
State Government	96	14,635	\$46,300	0.72	-5,777
Local Government	574	65,766	\$33,032	1.17	9,749
Unclassified	157	308	\$15,768	0.28	-778
Total, All Industries	27,211	561,926	\$37,084		-5,412
Total, All Private	26,350	476,062	\$37,249		-2,631

*Source: Quarterly Census of Employment and Wages * Average Annual wage expressed in 2005 dollars*

Appendix 9 - Change in Economic Indicators for the G-FL Region by Industry Sector (2000-2005)

Table A-9 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Sector (2000-2005)

Industry Sector	Change in Establishments		Change in Employment		Change in Average Annual Wage**	
	Number	Percent	Number	Percent	Dollars	Percent
Agriculture, Forestry, Fishing & Hunting	362	-5%	-21	-5%	540	2%
Mining	-12	-13%	-5	-13%	-7596	-17%
Construction	-677	0%	3	0%	257	1%
Manufacturing	-24320	-7%	-128	-7%	316	1%
Wholesale Trade	-850	-6%	-93	-6%	1308	3%
Retail Trade	-1986	-4%	-168	-4%	183	1%
Transportation and Warehousing	-43	0%	0	0%	-1196	-4%
Information	-1165	-10%	-46	-10%	-6918	-12%
Finance and Insurance	-911	5%	72	5%	1580	3%
Real Estate and Rental and Leasing	-179	5%	52	5%	7730	29%
Professional and Technical Services	289	3%	74	3%	-1863	-4%
Management of Companies and Enterprises	-253	24%	31	24%	8870	13%
Administrative and Waste Services	-2735	4%	47	4%	2574	11%
Educational Services	5400	18%	47	18%	-3202	-7%
Health Care and Social Assistance	3378	5%	133	5%	1881	6%
Arts, Entertainment, and Recreation	777	3%	15	3%	-1240	-7%
Accommodation and Food Services	-751	-2%	-48	-2%	-272	-2%
Other Services	1970	3%	83	3%	-89	0%
Total, All Government	4672	9%	75	9%	2663	7%
Unclassified	601	527%	785	527%	6109	40%
Total, All Private	-18692	3%	905	3%	-453	-1%
Total, All Industries	-14020	4%	980	4%	48	0%

Source: Quarterly Census of Employment and Wages

*** Average Annual wage expressed in 2005 dollars*

Appendix 10 - 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 11 - Stakeholder Input Session Attendees, 2006

**Table A-11 – CEDS Stakeholder Input Sessions
Attendee List, 2006**


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
Jeromy 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@geneseeny.com

**Table A-11 – CEDS Stakeholder Input Sessions
Attendee List, 2006 (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 12 – CEDS Stakeholder Input Meeting Presentation, 2006

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 13 – CEDS Stakeholder Input Meeting Notes, 2006

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 for 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