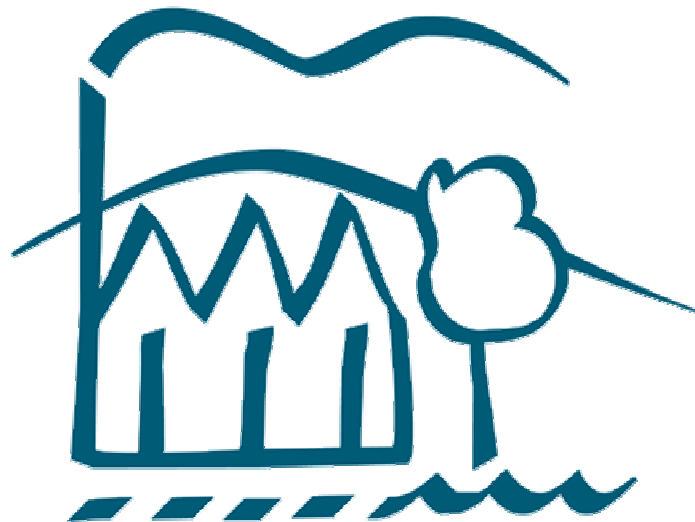

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update



GENESEE/FINGER LAKES
Regional Planning Council

2008-2009

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update

2008-2009



Prepared by the
Genesee/Finger Lakes Regional Planning Council
50 West Main Street, Suite 8107
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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.

The preparation of this report was financially aided through a grant from the Economic Development Administration, U.S. Department of Commerce under Public Law 105-393, the Economic Development Administration Reform Act of 1998, a comprehensive amendment of the Public Works and Economic Development Act of 1965.

Contract Grant Project Number: 01-83-08428-01

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 (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.

September 10, 2009

Date

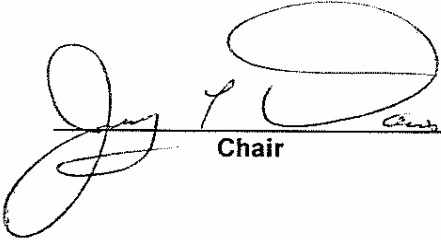

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Chapter 1 – Genesee-Finger Lakes Economic Development District

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 plan of action to further strengthen the District's economy is also included.

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 include: the Executive Committee, the Economic Development Advisory Committee (EDAC) 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.

2008-2009 Comprehensive Economic Development Strategy Update

Table 1 - Genesee/Finger Lakes Regional Planning Council				
Member	Affiliation	Status	Race	Gender
Mary Pat Hancock	Genesee County	Voting	White	Female
Esther Leadley (A)	Genesee County	Voting	White	Female
Steve Hyde	Genesee County	Voting	White	Male
Charles Zambito	Genesee County	Voting	White	Male
<i>James Duval</i>	<i>Genesee County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
James Merrick	Livingston County	Voting	White	Male
Brenda Donohue (A)	Livingston County	Voting	White	Female
William Wadsworth	Livingston County	Voting	White	Male
Robert Yull	Livingston County	Voting	White	Male
<i>Angela Ellis</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Julie Marshall</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Patrick Rountree</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Maggie Brooks	Monroe County	Voting	White	Female
Wayne Zyra	Monroe County	Voting	White	Male
Jeffrey Adair	Monroe County	Voting	White	Male
Linda Dobson	Monroe County	Voting	White	Female
Kal Wysokowski	Monroe County	Voting	White	Female
<i>Thomas Goodwin</i>	<i>Monroe County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Judy Seil</i>	<i>Monroe County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Robert Duffy	City of Rochester	Voting	White	Male
Charles Thomas (A)	City of Rochester	Voting	White	Male
Gladys Santiago	City of Rochester	Voting	White	Female
<i>Carlos Carballada</i>	<i>City of Rochester</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Karen Altman</i>	<i>City of Rochester</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Theodore Fafinski	Ontario County	Voting	White	Male
Robert LaRocca (A)	Ontario County	Voting	White	Male
Samual Casella	Ontario County	Voting	White	Male
Dorothy Huber	Ontario County	Voting	White	Female
<i>Kristen Hughes</i>	<i>Ontario County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Michael Manikowski</i>	<i>Ontario County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Henry Smith	Orleans County	Voting	Black	Male
Wayne Hale (A)	Orleans County	Voting	White	Male
Kenneth Rush	Orleans County	Voting	White	Male
<i>James Whipple</i>	<i>Orleans County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Chuck Lafler	Seneca County	Voting	White	Male
William Bordeau (A)	Seneca County	Voting	White	Male
Suzanne Sinclair	Seneca County	Voting	White	Female
<i>Robert Aronson</i>	<i>Seneca County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Mitchell Rowe</i>	<i>Seneca County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
James Hoffman	Wayne County	Voting	White	Male
James Fabino	Wayne County	Voting	White	Male
David Lyon	Wayne County	Voting	White	Male
<i>Margaret Churchill</i>	<i>Wayne County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Sharon Lilla</i>	<i>Wayne County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Douglas Berwanger	Wyoming County	Voting	White	Male
Joe Gozelski (A)	Wyoming County	Voting	White	Male
Jerry Davis	Wyoming County	Voting	White	Male
<i>Michael Hefika</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Drew Shapiro</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Robert Multer	Yates County	Voting	White	Male
Nancy Taylor (A)	Yates County	Voting	White	Female
Donald House	Yates County	Voting	White	Male
<i>Shawna Bonshak</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Steve Griffin</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Wilfred Brooks	At-Large	Voting	Black	Male
Clyde Forbes	At-Large	Voting	Black	Male
Nathan Rudgers	At-Large	Voting	White	Male
David Woods	At-Large	Voting	White	Male
Richard Perrin	Genesee Transportation Council	Ex-Officio	White	Male

(A) Alternate

2.3.a Comprehensive Economic Development Strategy (CEDS) Committee

The Genesee/Finger Lakes Regional Planning Council members also serve as the CEDS Strategy Committee. G/FLRPC advisory committees assist in the development of the CEDS. These advisory committees include the Planning Coordinating Committee (PCC) and the Economic Development Advisory Committee (EDAC).

Each of the CEDS Strategy Committee members and other regional stakeholders from the public, private and community sectors were invited to Stakeholder Input sessions held on March 26, 27 and 28, 2008 through a mailing that went to their home and/or office, along with a personal invitation to those in attendance at the March 2008 Regional Planning Council/CEDS Strategy Committee meeting. A copy of the invitation that was distributed to the CEDS Strategy Committee members can be found in Appendix 1. The CEDS Strategy Committee was 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.

The CEDS was discussed at the April 25, 2008 EDAC/RDC meeting and EDAC and Regional Development Corporation (RDC) members provided critical input and feedback into the goals and priorities outlined in the CEDS. A final version of the 2008 CEDS was adopted at the June, 2008 Genesee/Finger Lakes Regional Planning Council meeting.

The 2009 update of the CEDS was discussed at the June 5, 2009 PCC meeting and the July 24, 2009 EDAC/RDC meeting. Individual meetings with each County Economic Development/Industrial Development Agency, the City of Rochester Economic Development Department and other regional stakeholders were conducted between March and July allowing these groups the opportunity to provide insight, recommendations and updates to the Comprehensive Economic Development Strategy.

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 four to eight times annually. The Executive Committee's members are listed in Table 2.

Table 2 - Executive Committee				
Member	Address	Affiliation	Race	Gender
Esther Leadley	11047 River Road Pavilion, NY 14525	Legislator, Genesee County Legislature	White	Female
Brenda Donohue	6 Court Street Geneseo, NY 14454	Supervisor, Town of Conesus, Livingston County Board of Supervisors	White	Female
Jeffrey Adair, Vice Chair	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
Dorothy Huber	PO Box 85 East Bloomfield, NY 14443	Supervisor, Town of East Bloomfield, Ontario County Board of Supervisors	White	Female
Wayne Hale	14016 Route 31 West Albion, NY 14411	Director, Orleans County Planning and Development	White	Male
Suzanne Sinclair	1 DiPronio Drive Waterloo, NY 13165	County Manager, Seneca County	White	Female
James Hoffman	26 Church Street Lyons, NY 14489	Supervisor, Town of Williamson, Chairman, Wayne County Board of Supervisors	White	Male
Jerry Davis, Chair	7414 Court Road Pavilion, NY 14525	Supervisor, Town of Covington, Wyoming County Board of Supervisors	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
James Duvall	3837 West Main Street Batavia, NY 14020	Chair, G/FLRPC Planning Coordination Committee	White	Male
Steve Griffin	1 Keuka Business Park Penn Yan, NY 14527	Chair, G/FLRPC Economic Development Advisory Committee	White	Male

2.3.c Economic Development Advisory Committee

The Economic Development Advisory Committee (EDAC) was specifically designed to assist with the District's economic development program. 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. The EDAC Chair is a member of the Executive Committee and the EDAC's members are ex-officio, non-voting members of the G/FLRPC. 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 Development Group	White	Male
Judy Seil, Director	50 West Main Street Suite 8100 Rochester, NY 14614	Monroe County Planning & Development	White	Female
Carlos 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 Suite 106B Canandaigua, NY 14424	Ontario County Office of Economic Development	White	Male
James Whipple CEO/CFO	111 West Ave. Albion, NY 14411	Orleans County Economic Development Agency	White	Male
Robert Aronson, Executive Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Industrial Development Agency	White	Male
Margaret Churchill, Executive Director	16 William Street Lyons, NY 14489	Wayne County Industrial Development Agency	White	Female
Michael Heftka, Executive Director	6470 Route 20A Suite 4 Perry, NY 14530	Wyoming County Industrial Development Agency	White	Male
Steve Griffin, Executive Director, Chair	1 Keuka Business Park Penn Yan, NY 14527	Yates County Industrial Development Agency	White	Male
Robert McNary Director, Finger Lakes Regional Office	400 Andrews Street, Suite 100 Rochester, NY 14604	Empire State Development Corporation	White	Male

2.3.d Rochester/Finger Lakes Regional Development Corporation

The Rochester/Finger Lakes Regional Development Corporation (RDC), a non-profit, also serves the region by promoting regional economic development; meetings of EDAC and RDC are held concurrently. Members of the RDC include both those listed in Table 3 on page seven and Table 4 below.

Table 4 – Rochester/Finger Lakes Regional Development Corporation (RDC)				
Member	Address	Affiliation	Race	Gender
Brian R. Anderson, Lead Economic Developer	300 Erie Boulevard West A-2 Syracuse, NY 13202	National Grid	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	PathStone Enterprise Center	White	Male
Clyde Forbes, Director of Economic Development	89 East Avenue Rochester, NY 14649	Rochester Gas & Electric Corporation	Black	Male
Maureen Duggan, Assistant Director	20 Ontario Street Suite 106B 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 Development Group	White	Female
Joseph Hamm, Regional Administrator	276 Waring Rd Rochester, NY 14609	NYS Department of Labor	White	Male
Richard Perrin, Executive Director	50 W. Main Street., Suite 8112 Rochester, NY 14614	Genesee Transportation Council	White	Male
Matt Hurlbutt, Managing Director, Business Development	100 Chestnut Street - One HSBC Plaza Suite 1910 Rochester, NY 14604	Greater Rochester Enterprise	White	Male
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

The Planning Coordination Committee (PCC) serves as the general planning advisory committee to G/FLRPC. 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. 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
Angela Ellis, Director	6 Court Street - Room 305 Geneseo, NY 14454	Livingston County Planning Department	White	Female
Thomas Goodwin, 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
Mitchell Rowe, Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Department of Planning & Community Development	White	Male
Sharon Lilla, Director	9 Pearl Street Lyons, NY 14489	Wayne County Planning Department	White	Female
Drew Shapiro, Director	6470 State Route 20A, Suite 4 Perry, NY 14530	Wyoming County Department of Planning & Development	White	Male
Shawna Bonshak, Planner	417 Liberty Street Penn Yan, NY 14527	Yates County Department of Planning	White	Female
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
Greg Albert	Senior Planner – Economic Development	White	Male
Rudeen Armstrong	Business Manager	Black	Female
Jayne Breschard	Senior Planner	White	Female
Razy Kased	Planner	White	Male
Thomas Kicior	Planner	White	Male
Brian Slack	Senior Planner	White	Male
Tim Sullivan	Planner	White	Male
David Zorn	Executive Director	White	Male

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

2.3.g.i. Economic Development Planning

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

2.3.g.ii Western Erie Canal Main Street Program

The Western Erie Canal Main Street Program (WECMSP) is an implementation strategy of the *Western Erie Canal Heritage Corridor Management Plan*, adopted by the New York State Office of Parks, Recreation and Historic Preservation in August, 2005. In March 2006, the Western Erie Canal Alliance (WECA) was formed as a non-profit corporation to implement the *Western Erie Canal Heritage Corridor Management Plan*.

WECA has also retained Genesee/Finger Lakes Regional Planning Council (G/FLRPC) to fulfill the Regional Program Coordinator role. The Regional Coordinator oversees the day-to-day operation of the WECMSP and provides technical assistance and training in the Four-Point Approach™, which may include: organizational development, consensus building, fund raising, marketing, small business development, volunteer recruitment, adaptive reuse of older buildings, heritage tourism, Erie Canal harbor development, and other specialized training.

In September 2008, the communities of the Village of Albion in Orleans County, Village of Lyons in Wayne County, and City of Lockport in Niagara County were announced by WECA as the three inaugural designated Main Street communities of the WECMSP. Those communities have begun to receive high-quality technical assistance and training from the NTMSC and the WECMSP. Services provided to the newly-formed local Main Street programs (Albion Main Street Alliance, Lockport Main Street, Inc., and Lyons Main Street) include: Main Street Basic Training and New Manager Orientation, Resource Team Visits, and Work Plan Workshops.

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, brownfield redevelopment, historic preservation, and Main Street/Community Centers planning in addition to local government support and training/workshop/conference development and coordination.

2.3.g.iii.a 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.b 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.c Municipal Planning

Municipal Planning services include local government services, comprehensive planning, land use regulation and control and a host of other planning initiatives including 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.d Water Resources Planning

Water Resources Planning encompasses a variety of services, which advance the overall goal of protecting and improving water quality and quantity and the uses of our surface and groundwater. 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, blueway trails, wellhead protection and assistance with the implementation of state and federal regulations.

2.3.g.iii.e Historic Preservation Planning

Historic preservation is the recognition that historic and cultural properties are a living part of community life and development and vital to public interest. It enhances the distinctive character of communities; revitalizes commercial, industrial, and residential districts; and is a powerful economic development strategy. Planning for historic preservation involves long-range vision, goals and objectives and recommended implementation actions. The preservation planning process establishes the basis for public policy; identifies economic opportunities based on heritage and architectural character; ensures consistency with various local government policies; provides the foundation for local protection of historic resources; and creates an agenda for future preservation actions. G/FLRPC has the ability to assist communities with historic preservation planning—whether in the preparation of a formal planning document, or in the planning process.

2.3.g.iv Data, Technology and Resource Center

GIS services include general mapping data/database development, data conversion, digitalization, demographic analysis, project planning & management and application development. Remote sensing services include the integration of digital ortho-imagery and aerial photography.

2.3.g.iv.a Socio-Economic and Demographic Data

The district provides socio-economic and demographic data development, analysis and dissemination services which includes working through the New York State Data Center (NYSDC) Affiliate program. The NYSDC Affiliate program operates through a network of Affiliate Data Centers throughout the State. These agencies maintain Census and related economic and demographic data, provide local information services to local government, business and the public, and support the development of the decennial census. Additional services include school district enrollment projections, population projections, land use trends, and county profiles.

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.



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 (1960-2007)*, the most populous counties, after Monroe, have been Ontario and Wayne.

Table 7 - Population for the G-FL Region (1960-2007)

	1960	1970	1980	1990	2000	2007 (est.)
Genesee	53,994	58,722	59,400	60,060	60,370	58,122
Livingston	44,053	55,041	57,006	62,372	64,328	63,196
Monroe	586,387	711,917	702,238	713,968	735,343	729,681
Ontario	68,070	78,849	88,909	95,101	100,224	103,956
Orleans	34,159	37,305	38,496	41,846	44,171	42,371
Seneca	31,984	35,083	33,733	33,683	33,342	34,228
Wayne	67,989	79,404	84,581	89,123	93,765	91,291
Wyoming	34,793	37,688	39,895	42,507	43,424	41,932
Yates	18,614	19,831	21,459	22,810	24,621	24,557
G-FL Region	940,043	1,113,840	1,125,717	1,161,470	1,199,588	1,189,334

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 1980 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. From 1970 to 2007, all counties experienced some growth with the exception of Seneca County and Genesee County. Seneca County has experienced population decline since 1970, but has shown some population growth from 2000 to the present, while Genesee County experienced slight growth from 1970 to 2000 and has since experienced population decline to pre-1970 levels.

3.3.b Population Growth (1980-2007)

In order to understand recent population shifts and dynamics, an analysis of population growth from 1980-2007 was compiled in Table 8, *Population Growth for the G-FL Region, NYS and the US (1980-2007)*.

Table 8 - Population Growth for the G-FL Region, NYS and US (1980-2007)

	1980	1990	2007 (est.)	Change (1980-2007)	
				By People	By percentage
Genesee	59,400	60,060	58,122	-1,278	-2.2
Livingston	57,006	62,372	63,916	6,196	10.9
Monroe	702,238	713,968	729,681	27,481	3.9
City of Rochester	241,741	231,636	206,759	-34,982	-14.5
Ontario	88,909	95,101	103,956	15,056	16.9
Orleans	38,496	41,846	42,371	3,871	10.1
Seneca	33,733	33,683	34,228	528	1.6
Wayne	84,581	89,123	91,291	6,691	7.9
Wyoming	39,895	42,507	41,932	2,032	5.1
Yates	21,459	22,810	24,557	3,057	14.2
G-FL Region	1,125,717	1,161,470	1,189,334	63,634	5.7
NYS	17,558,165	17,990,778	19,297,729	1,739,564	9.9
US	226,545,805	248,718,297	301,621,157	75,075,352	33.1

Source: US Census Bureau

During that twenty-seven year time period, the United States experienced explosive growth with a growth rate of 33%. 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 10%. The G-FL region grew at a rate of 6% during the period of time between 1980 and 2007. This is slightly less than the state growth rate, but far less than national growth.

Four counties in the G-FL region; Livingston, Ontario, Orleans and Yates, had a growth rate greater than the state. The only county to experience a negative growth rate was Genesee County with a loss of 1,278 people, or a 2% 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 25-44 age cohort. The percentage of people over the age of 65 in the region is 13.6%, compared to 13.2% in the state and 12.6% in the nation, as illustrated by Table 9, *Age Distribution for the G-FL Region, NYS and the US in 2007*, indicating that the population in the region is slightly older than both the state and the nation. No county in the region has a smaller percentage of the population over the age of 65 than the nation.

The low percentage of people aged 25-44 is a cause for concern in the region as this age cohort is typically an indicator of the number of people purchasing homes in the

Table 9 - Age Distribution for the G-FL Region, NYS and US in 2007 (estimated)

	Under 18	18 to 24	25 to 44	45 to 64	65 and over
Genesee	22.3%	9.6%	25.0%	27.8%	15.3%
Livingston	19.5%	16.2%	24.9%	26.8%	12.6%
Monroe	23.0%	11.8%	24.8%	27.0%	13.4%
Ontario	21.9%	10.2%	25.3%	28.4%	14.2%
Orleans	22.2%	9.4%	28.2%	26.8%	13.3%
Seneca	20.6%	10.2%	28.2%	26.5%	14.5%
Wayne	23.9%	8.6%	25.4%	28.8%	13.3%
Wyoming	20.1%	9.6%	29.8%	27.4%	13.0%
Yates	23.6%	11.5%	22.4%	26.2%	16.3%
G-FL Region	22.5%	11.3%	25.3%	27.3%	13.6%
NYS	22.9%	10.2%	27.8%	25.9%	13.2%
USA	24.5%	9.8%	27.8%	25.4%	12.6%

Source: US Census Bureau

region. The G-FL Region as a whole has a slightly lower percentage of persons in this age cohort than New York State or the nation; although certain counties in the region do exceed or equal the state and nation in percentage of persons in the 25-44 age cohort.

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 New York, 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	12.0	10.1	6.2
Livingston	17.6	33.8	19.0	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	7.0
Wayne	17.8	36.2	18.7	10.4	10.7	6.3
Wyoming	24.4	38.9	16.0	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 New York 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% of its population has an Associates degree, which is greater than upstate New York, the state and the nation.

3.3.e Per Capita Personal 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 group.² The per capita income in the G-FL region increased by \$4,004 in constant dollars, or 12.9%, between 1996 and 2006, as shown in Table 11, *Per Capita Personal Income for the G-FL Region, NYS and the US*.

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

	PCI (\$)		Change (1996-2006)	
	1996*	2006	By Dollars	By Percent
Genesee	26,019	29,067	3,048	11.7%
Livingston	25,142	27,650	2,508	10.0%
Monroe	34,203	38,496	4,293	12.6%
Ontario	29,612	34,424	4,812	16.3%
Orleans	22,780	25,131	2,351	10.3%
Seneca	25,165	28,178	3,013	12.0%
Wayne	27,846	30,730	2,884	10.4%
Wyoming	21,701	26,004	4,303	19.8%
Yates	21,979	26,097	4,118	18.7%
G-FL Region	31,005	35,009	4,004	12.9%
New York	36,522	44,027	7,505	20.5%
US	31,062	36,714	5,652	18.2%

Source: New York State Data Center

* 1996 dollars are adjusted for inflation and are expressed in 2006 dollars

The per capita income in the G-FL region is less than the state and the nation and has increased at a lower percentage from 1996 to 2006 than the state and nation.

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

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 1997-2007 time period, as illustrated in Table 12, *Poverty Status for the G-FL Region, NYS and the US*.

The percent of people living in poverty in the G-FL region in 2007 is less than New York State and the nation. All counties, however, with the exception of Wyoming, experienced an increase in the percent of people living in poverty from 1997 to 2007, while there was a state and national decrease.

During the 1997-2007 time period, the percentage of the population under the age of 18 living in poverty decreased in the region, state and nationally. All counties in the G-FL region, with the exceptions of Orleans, Wayne and Yates, had a decrease in the percentage of the population under the age of 18 living in poverty.

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

	Population living in poverty		Population under 18 living in poverty	
	1997	2007	1997	2007
Genesee	9.8	11.9	15.3	14.8
Livingston	11.1	12.8	16.1	13.7
Monroe	12.5	13.3	19.9	18.6
Ontario	9.2	9.5	14.9	13.5
Orleans	12.6	13.4	18.4	19.2
Seneca	11.9	12.1	19.1	17.6
Wayne	10.6	11.3	15.7	16.1
Wyoming	11.6	9.6	15.4	13.5
Yates	15.3	15.8	24.7	25.9
G-FL Region	11.9	12.6	18.5	17.5
New York	15.6	13.8	24.7	19.6
US	13.3	13.0	19.9	18.0

Source: US Census Bureau

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 New York, 56.5% in NYS and 68.7% nationally. In addition, each county in the G-FL region is well above state average and only Monroe County is below the national average of home ownership, as illustrated by Table 13, *Home Ownership Rates in 2000*.

Table 13 – Home Ownership Rates in 2000

	Rate of home ownership
Genesee	73.0%
Livingston	74.5%
Monroe	65.1%
Ontario	73.6%
Orleans	75.6%
Seneca	73.8%
Wayne	77.6%
Wyoming	76.7%
Yates	77.1%
G-FL Region	68.8%
Upstate New York	67.8%
New York	56.5%
US	68.7%

Source: US Census Bureau

Furthermore, the median value home price for each county in the region in 2000 was substantially less than the state median home value of \$148,700 and the national median home value of \$119,600, as illustrated by Table 14, *Median Home Values and Median Gross Rents in 2000*.

In addition, all of the counties' median gross rent was less than the state and only Monroe County, where the majority of renters reside and the median gross rent per month is \$612, had a median gross rent higher than the national median gross rent of \$602.

Table 14 - 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
New York	148,700	672
US	119,600	602

Source: US Census Bureau

3.4 Economic, Workforce and Transportation Profile

The Genesee-Finger Lakes region is transitioning from an industrial economy to a service-based economy. This is illustrated through the large number of firms and employment in the Retail Trade major sector and, to a certain extent, in the large number of employees in the Health Care and Social Assistance sector. Also notable is the increase in employment in the Educational Services sector, which has added a significant number of jobs between 2000 and 2007. In addition, the decline of employment in the manufacturing sector has continued within the region.

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 2007.

There are some constraints associated with Quarterly Census of Employment and Wages data. Data at the county level are 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 subsectors that are included in them can be found in Appendix 3.

The 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 2000-2007 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 2000-2007 period is short, there are some major events that it captures. In 2000, when the first sets of data were 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 regional 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 were collected from the United States Department of Agriculture, National Agricultural Statistics Service. The data include the number of farms, acres of farmland, and cash receipts for crops, livestock and all products in 2007. 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 2007 the top three sectors of employment were Government, Manufacturing and Health Care and Social Assistance, as illustrated in Table 15 - *Employment in the G-FL Region by Major Sector (2007)*.

Table 15 - Employment in the G-FL Region by Major Sector (2007)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	922	-	453	592	742
Mining	71	-	141	82	42
Construction	885	971	12,550	2,698	271
Manufacturing	3,083	2,312	55,865	6,756	2,065
Wholesale Trade	1,018	498	14,220	1,685	-
Retail Trade	2,586	2,829	40,126	8,791	1,280
Transportation and Warehousing	-	-	-	1,123	218
Information	201	206	9,078	637	94
Finance and Insurance	402	344	11,870	1,017	1,029
Real Estate and Rental and Leasing	186	155	5,832	395	47
Professional and Technical Services	575	349	20,835	1,451	85
Management of Companies and Enterprises	76	-	11,012	62	-
Administrative and Waste Services	388	-	21,193	1,430	199
Educational Services	157	59	22,242	924	-
Health Care and Social Assistance	2,475	1,849	55,679	6,316	-
Arts, Entertainment, and Recreation	980	143	5,050	1,097	107
Accommodation and Food Services	1,872	1,830	24,384	4,791	668
Other Services	1,045	611	13,268	1,462	261
Total, All Government	5,935	6,828	47,561	8,274	4,279
Unclassified	44	29	565	62	24
Total, All Private	17,617	13,517	332,007	41,573	8,704
Total, All Industries	23,552	20,345	379,568	49,847	12,983

Source: Quarterly Census of Employment and Wages

Table 15 - Employment in the G-FL Region by Major Sector(2007) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	-	-	780	219	3,708
Mining	-	-	11	-	347
Construction	263	1,300	475	279	19,692
Manufacturing	1,876	6,111	2,330	1,044	81,442
Wholesale Trade	278	771	-	-	18,470
Retail Trade	2,035	3,360	1,634	665	63,306
Transportation and Warehousing	-	-	399	168	1,908
Information	27	308	80	55	10,686
Finance and Insurance	150	484	271	112	15,679
Real Estate and Rental and Leasing	66	201	63	126	7,071
Professional and Technical Services	-	624	-	128	24,047
Management of Companies and Enterprises	-	222	-	33	11,405
Administrative and Waste Services	202	777	1,429	54	25,672
Educational Services	-	79	-	-	23,461
Health Care and Social Assistance	-	2,747	-	-	69,066
Arts, Entertainment, and Recreation	83	339	171	47	8,017
Accommodation and Food Services	829	1,546	763	535	37,218
Other Services	242	619	484	281	18,273
Total, All Government	3,157	7,976	4,323	1,305	89,638
Unclassified	15	41	13	17	810
Total, All Private	8,158	21,792	10,242	5,514	459,124
Total, All Industries	11,315	29,768	14,565	6,819	548,762

Source: Quarterly Census of Employment and Wages

In 2007, there were 89,638 workers in the G-FL region employed by the local government, with most employed by public school districts, the highest of any employment category. Indeed, the only two counties in the region where Government is not the largest sector of employment are Monroe and Ontario Counties. A total of 16.3% of all employment in the region can be attributed to public sector employment.

Manufacturing was the second largest source of employment for the region with 81,442 workers, accounting for 15.5% of regional employment and 17.7% of regional private employment. Manufacturing employment is a major source of export employment in the region; however its share of regional employment has decreased every year since 2000.

Healthcare and Social Assistance was the third largest employment sector in the region with 69,066 employed in the sector. This can be attributed to the many healthcare facilities in the region combined with an aging regional population. Despite the high number of employment, the sector has lost over 1,000 jobs since 2004.

Retail Trade had 63,306 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 may 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 suggesting that some of the Retail Trade industry can likely be attributed to an export industry.

The employment changes from 2000 to 2007 are shown in Table 16, *Change in Employment by Major Sector in the G-FL Region (2000-2007)*.

Table 16 -Change in Employment by Major Sector in the G-FL Region (2000-2007)

	2000	2007	Change	% Change
Agriculture, Forestry, Fishing & Hunting	5,504	3,708	-1,796	-32.6%
Mining	366	347	-19	-5.2%
Construction	19,990	19,692	-298	-1.5%
Manufacturing	110,177	81,442	-28,735	-26.1%
Wholesale Trade	19,124	18,470	-654	-3.4%
Retail Trade	65,575	63,306	-2,269	-3.5%
Transportation and Warehousing	9,333	1,908	-7,425	-79.6%
Information	12,938	10,686	-2,252	-17.4%
Finance and Insurance	15,191	15,679	488	3.2%
Real Estate and Rental and Leasing	7,523	7,071	-452	-6.0%
Professional and Technical Services	23,942	24,047	105	0.4%
Management of Companies and Enterprises	10,831	11,405	574	5.3%
Administrative and Waste Services	26,496	25,672	-824	-3.1%
Educational Services	17,087	23,461	6,374	37.3%
Health Care and Social Assistance	67,955	69,066	1,111	1.6%
Arts, Entertainment, and Recreation	7,146	8,017	871	12.2%
Accommodation and Food Services	37,141	37,218	77	0.2%
Other Services	16,210	18,273	2,063	12.7%
Total, All Government	85,862	89,638	3,776	4.4%
Unclassified	293	810	517	176.5%
Total, All Private	476,063	459,124	-16,939	-3.6%
Total, All Industries	561,925	548,762	-13,163	-2.3%

Source: Quarterly Census of Employment and Wages

There was a loss of 28,735 manufacturing jobs in the seven year period from 2000 to 2007 for a decrease of 26.1%. This accounted for most of the overall loss in private sector employment. Public sector employment grew by 3,776 jobs but that could not offset the job loss in the private sector. There was still a loss of 13,163 jobs in all industries.

The largest increase between 2000 and 2007 was in Educational Services with a gain of 6,374 jobs. Educational Services includes 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. Other major sectors that experienced an increase in employment were Health Care and Social Assistance; Other Services; Arts, Entertainment and Recreation; Government; Management of Companies and Enterprises, Finance and Insurance; Accommodation and Food Services; and Professional and Technical Services.

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 17, *Number of Firms in the G-FL Region by Major Sector (2007)*, 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 17 – Number of Firms in the G-FL Region by Major Sector (2007)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	56	43	47	52	50
Mining	7	4	9	8	4
Construction	144	160	1,591	319	81
Manufacturing	95	74	966	162	44
Wholesale Trade	98	55	1,087	163	16
Retail Trade	206	202	2,291	528	111
Transportation and Warehousing	34	29	329	51	30
Information	12	17	276	44	9
Finance and Insurance	57	55	1,074	124	27
Real Estate and Rental and Leasing	37	46	772	84	17
Professional and Technical Services	84	99	1,997	222	30
Management of Companies and Enterprises	7	4	133	8	0
Administrative and Waste Services	41	49	964	138	19
Educational Services	14	5	269	18	2
Health Care and Social Assistance	136	122	1,704	234	85
Arts, Entertainment, and Recreation	34	29	262	74	16
Accommodation and Food Services	122	140	1,373	260	60
Other Services	154	137	1,801	273	76
Total, All Government	80	97	331	120	66
Unclassified	31	32	558	74	25
Total, All Private	1,368	1,303	17,511	2,838	702
Total, All Industries	1,448	1,400	17,841	2,958	768

Source: Quarterly Census of Employment and Wages

Table 17 - Number of Firms in the G-FL Region by Major Sector (2007) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	14	105	53	25	445
Mining	1	5	3	0	41
Construction	62	291	91	75	2,814
Manufacturing	44	136	49	43	1,613
Wholesale Trade	24	89	31	18	1,581
Retail Trade	174	275	148	93	4,028
Transportation and Warehousing	16	42	40	19	590
Information	10	29	10	7	414
Finance and Insurance	29	69	34	16	1,485
Real Estate and Rental and Leasing	19	51	18	20	1,064
Professional and Technical Services	41	115	45	30	2,663
Management of Companies and Enterprises	3	9	5	4	173
Administrative and Waste Services	23	101	32	19	1,386
Educational Services	6	13	3	4	334
Health Care and Social Assistance	63	148	62	57	2,611
Arts, Entertainment, and Recreation	9	41	21	9	495
Accommodation and Food Services	63	144	76	51	2,289
Other Services	56	190	85	55	2,827
Total, All Government	57	127	70	44	992
Unclassified	14	44	15	20	813
Total, All Private	671	1,895	821	564	27,673
Total, All Industries	727	2,022	891	608	28,663

Source: Quarterly Census of Employment and Wages

In 2007, there were 28,663 establishments in the G-FL region and 27,673 were private sector firms. In the 2000 to 2007 time period, there was an increase in the number of establishments in the region by 1,451, a 5.3% increase. The large majority of growth in establishments is derived from the private sector, which had an increase of 1,322 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 2007 was \$39,832. This constitutes an increase of \$325 from the 2000 average annual wage of \$39,507, when adjusted for inflation and expressed in 2007 dollars, as shown in Table 18, *Average Annual Wage for the G-FL Region (2007)*.

Table 18 - Average Annual Wage for the G-FL Region (2007)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	\$29,387	-	\$200,40	\$24,816	\$23,213
Mining	\$40,338	-	\$460,21	\$41,488	\$43,167
Construction	\$37,544	\$43,016	\$48,360	\$47,010	\$38,672
Manufacturing	\$42,664	\$39,492	\$63,629	\$50,504	\$36,794
Wholesale Trade	\$43,165	\$40,831	\$59,275	\$33,542	-
Retail Trade	\$22,710	\$26,696	\$22,620	\$22,368	\$20,164
Transportation and Warehousing	-	-	-	\$34,783	\$25,991
Information	\$33,075	\$24,296	\$58,457	\$63,656	\$13,415
Finance and Insurance	\$45,025	\$32,180	\$67,768	\$41,895	\$30,373
Real Estate and Rental and Leasing	\$28,763	\$22,994	\$30,824	\$24,170	\$17,362
Professional and Technical Services	\$44,221	\$31,493	\$54,125	\$52,673	\$24,000
Management of Companies and Enterprises	\$70,421	-	\$80,097	\$42,516	-
Administrative and Waste Services	\$25,608	-	\$29,334	\$26,500	\$14,970
Educational Services	\$26,885	\$18,678	\$48,637	\$38,444	-
Health Care and Social Assistance	\$27,580	\$28,491	\$35,850	\$32,466	-
Arts, Entertainment, and Recreation	\$15,033	\$10,517	\$18,047	\$18,036	\$11,346
Accommodation and Food Services	\$12,577	\$11,106	\$14,228	\$14,396	\$9,277
Other Services	\$18,123	\$22,147	\$23,022	\$18,841	\$15,766
Total, All Government	\$36,111	\$36,958	\$43,349	\$38,791	\$41,574
Unclassified	\$28,818	\$19,276	\$22,324	\$17,500	\$17,667
Total, All Private	\$29,828	\$29,223	\$42,759	\$33,700	\$26,823
Total, All Industries	\$31,412	\$31,819	\$42,833	\$34,545	\$31,684

Source: Quarterly Census of Employment and Wages

Table 18 - Average Annual Wage for the G-FL Region (2007) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	-	-	\$27,401	\$15,014	\$24,765
Mining	-	-	\$53,000	-	\$43,663
Construction	\$38,958	\$37,144	\$35,907	\$24,452	\$45,787
Manufacturing	\$52,615	\$42,486	\$35,888	\$34,045	\$57,368
Wholesale Trade	\$33,770	\$47,058	-	-	\$54,649
Retail Trade	\$20,048	\$22,090	\$22,576	\$21,543	\$22,598
Transportation and Warehousing	-	-	\$23,504	\$38,548	\$31,751
Information	\$27,778	\$21,890	\$22,563	\$25,782	\$55,667
Finance and Insurance	\$35,680	\$39,506	\$42,520	\$33,973	\$60,415
Real Estate and Rental and Leasing	\$23,742	\$19,985	\$17,841	\$18,627	\$29,430
Professional and Technical Services	-	\$58,053	-	\$42,070	\$53,403
Management of Companies and Enterprises	-	\$45,432	-	\$38,273	\$79,033
Administrative and Waste Services	\$39,351	\$30,807	\$36,414	\$27,074	\$29,521
Educational Services	-	\$19,557	-	-	\$47,917
Health Care and Social Assistance	-	\$26,044	-	-	\$34,657
Arts, Entertainment, and Recreation	\$19,253	\$13,277	\$14,409	\$18,234	\$17,187
Accommodation and Food Services	\$13,257	\$10,881	\$10,856	\$12,806	\$13,674
Other Services	\$14,500	\$18,596	\$18,496	\$21,416	\$21,867
Total, All Government	\$40,911	\$37,177	\$42,041	\$32,699	\$41,024
Unclassified	\$14,200	\$17,610	\$19,538	\$16,588	\$21,506
Total, All Private	\$31,046	\$33,749	\$29,218	\$25,726	\$39,599
Total, All Industries	\$33,798	\$34,667	\$33,024	\$27,061	\$39,832

Source: Quarterly Census of Employment and Wages

This small increase can primarily be attributed to public sector employment as during the 2000 to 2007 time period, the average annual wage for private sector employment fell by \$83.

The three highest average annual wage by major sector in 2007 were: Management of Companies and Enterprises; Finance and Insurance; and Manufacturing. It should be noted that while the Manufacturing sector has experienced a large loss in employment, wages have remained high and have increased by \$614 in constant dollars between 2000 and 2007. This is significant, especially compared to a loss of \$83 in wages for all private industry employment in the region. Indeed, in the largest growing sector, Education Services, the average annual wage decreased by \$2,051 in constant dollars.

The major sectors with the lowest average wages in 2007 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 are working fewer hours. 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 for Arts, Entertainment and Recreation and Other Services fell between 2000 and 2007 in constant dollars.

3.4.e Unemployment

In 2008, the unemployment rate for the G-FL region was 5.6% which constitutes an increase of 1.9% from 2000. This is illustrated in Table 19, *Unemployment Rate for the G-FL Region, NYS and the US (2000-2008)*.

The region's unemployment rate was slightly lower than the national rate and slightly higher than the New York State rate for 2008. Orleans, Wyoming, Livingston and Wayne Counties, however, had unemployment rates higher than the region, state and nation in 2008.

While the region's unemployment rate was lower than both the state and the nation in 2000, between 2000 and 2007 the region's unemployment rate rose at a faster rate, 1.9%, than both New York State, which grew by 0.9%, and the United States which increased by 1.8%.

Table 19 - Unemployment Rate for the G-FL Region, NYS and the US (2000-2008)

	2000	2008	% Change
Genesee	3.9	5.7	1.8%
Livingston	4.1	6.0	1.9%
Monroe	3.5	5.5	2.0%
City of Rochester	4.5	7.5	3.0%
Ontario	3.5	5.2	1.7%
Orleans	4.7	7.0	2.3%
Seneca	4.3	5.6	1.3%
Wayne	3.8	5.9	2.1%
Wyoming	4.7	6.3	1.6%
Yates	3.7	4.9	1.2%
G-FL Region	3.7	5.6	1.9%
NYS	4.5	5.4	0.9%
US	4.0	5.8	1.8%

Source: US 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 20, *Agricultural Economic Statistics for the G-FL Region (2007)*.

Table 20 - Agricultural Economic Statistics for the G-FL Region (2007)

			Cash Receipts (in dollars)		
	Number of Farms	Farmland (Acres)	Crops	Livestock	All Products
Genesee	530	173,800	\$72,247,000	\$106,264,000	\$178,511,000
Livingston	735	205,000	\$44,139,000	\$75,938,000	\$120,077,000
Monroe	580	104,400	\$65,784,000	\$11,454,000	\$77,238,000
Ontario	820	190,500	\$56,467,000	\$67,976,000	\$124,443,000
Orleans	460	130,200	\$87,972,000	\$10,738,000	\$98,710,000
Seneca	425	124,600	\$27,831,000	\$36,819,000	\$64,650,000
Wayne	830	161,700	\$105,346,000	\$43,270,000	\$148,616,000
Wyoming	705	210,800	\$50,845,000	\$203,217,000	\$254,062,000
Yates	665	112,700	\$31,635,000	\$40,349,000	\$71,984,000
G-FL Region	5,750	1,413,700	\$542,266,000	\$596,025,000	\$1,138,291,000
NYS	34,200	7,500,000	\$1,726,995,000	\$2,727,299,000	\$4,454,294,000
% NYS Total	16.8%	18.8%	31.4%	21.9%	25.6%

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

There were 5,750 farms in the G-FL region in 2007, constituting a total of 1,413,700 acres of farmland. In 2007, the agricultural industry in the G-FL region yielded \$1,138,291,000 in cash receipts for all products. In total, 26% of the state's cash receipts from all agricultural products came from the G-FL region. Thirty-one percent (31%) of the state's cash receipts in crops and 22% of cash receipts in livestock came from the G-FL region.

There are some indicators that agriculture is being strengthened while others point to it being threatened. Between 2000 and 2007, there was a net loss of 75,500 acres of farmland in the region and a net loss of 775 farms. The region made up 38% 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 \$973,117,896 when adjusted to 2007 dollars. In the following seven year period, cash receipts increased by \$165,173,104 in constant dollars to \$1,138,291,000. Livestock cash receipts increased by 28% and crop cash receipts increased by 7% during this time period in constant 2007 dollars.

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 7 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 impact 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 2007, the base multiplier for the G-FL region was 6.77. This means that for every job added to the export sector there was an additional 5.77 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 goods 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 2007, the industry in which the G-FL region was the most specialized was Chemical Manufacturing, which had a location quotient of 3.55, as shown in *Table 21 - Top 15 Industries by Location Quotient in the G-FL Region (2007)*.

While this industry remains strong, it has also experienced a decline between 2000 and 2007 and even between 2006 and 2007; the location quotient for Chemical Manufacturing in 2000 was 5.76 and in 2006 it was 4.39.

Machinery Manufacturing had the second highest location quotient and Educational Services was third. Animal Production and Beverage & Tobacco Product Manufacturing also were in the top 5 industries by location quotient in 2007.

Table 21 - Top 15 Industries by Location Quotient in the G-FL Region (2007)

NAICS	Industry	2006 LQ
325	Chemical Manufacturing	3.55
333	Machinery Manufacturing	3.22
611	Educational Services	2.62
112	Animal Production	2.39
312	Beverage & Tobacco Product Manufacturing	2.22
339	Miscellaneous Manufacturing	1.97
326	Plastics & Rubber Products Manufacturing	1.85
334	Computer and Electronic Product Mfg	1.70
551	Management of Companies and Enterprises	1.57
813	Membership Organizations & Associations	1.56
712	Museums, Parks and Historical Sites	1.56
111	Crop Production	1.52
445	Food and Beverage Stores	1.49
624	Social Assistance	1.45
332	Fabricated Metal Product Manufacturing	1.45

Source: G/FLRPC Analysis of Quarterly Census of Employment and Wages

3.4.h Transportation Access

The transportation system is a major determinant of quality of life and economic development in every community. The ability to safely and efficiently move people and goods is essential to the social and economic prosperity of the Genesee-Finger Lakes region. The transportation system in the region contains the following modes: highway and bridge; public transportation; bicycle and pedestrian; goods movement; and interregional travel. These constitute a network of state and federal highways and local roads, walking and bicycle trails, commercial air service and passenger rail service, and are available to the region's residents, businesses, and industries. Additionally, manufacturers and suppliers have access to rail and air freight services. These transportation options facilitate efficient and effective travel within the region and to destinations in other parts of the state, the nation, and the world.

The economic growth and vitality of the region is dependent on the efficient movement of goods into, out of, within, and through the region. The relative ease of getting products to market and receiving necessary inputs is a key consideration of goods-producing businesses when looking to continue, expand, or relocate operations. To ensure the economic success of the region, the goods movement network needs to be a distinguishing competitive feature of the transportation system relative to other metropolitan areas within New York State, the nation and the world.

Truck Service

Since the development of the interstate highway system, trucks have handled the vast majority of goods moving into, out of, within, and through the region, constituting the fastest growing component of travel on the region's highways and bridges. The continuing increase in freight transport by truck coupled with the North American Free Trade Agreement (NAFTA) and the region's close proximity to the Canadian border have resulted in measurable impacts to the highway and bridge network.

According to freight movement data from the 2002 Economic Census³, trucks handled 81.5% of all inbound traffic to the region and 97% of all outbound traffic, totaling 53 million tons of transported goods. The distinct competitive advantage that trucks offer in terms of flexibility for short hauls indicates that these trends will continue in the long-term.

³ 2002 United States Economic Census Commodity Flow Survey Metropolitan Areas: Rochester-Batavia-Seneca Falls, NY.

Rail Service

The transport of freight in the region via railroads continues to decline. Two Class 1 (annual revenues in excess of \$250 million) railroads, CSX and Norfolk Southern, and ten Class 3 (annual revenues less than \$20 million) railroads, operate in the region. A total of \$344 million worth of goods were transported to the region via rail in the year 2002, representing approximately 1.5% of the total value of goods received by the region. The decline of rail freight to the region has resulted in additional freight statistics being unavailable due to the small sample size of rail-freight within the region.⁴ Much of this decline is the result of shifting logistics and management practices including, but not limited to, just-in-time delivery requirements.

Air Cargo

According to the Federal Aviation Administration, more than 168,000 tons of freight was shipped through facilities at the Greater Rochester International Airport (GRIA) in 2007. While this is a significant amount of air cargo, it also represents a decline of 26% from the over 227,000 tons of freight handled in calendar year 2006. Despite this significant decline GRIA was still the second largest air cargo airport in upstate New York behind only Syracuse Hancock International Airport in Syracuse, NY. While the tonnage shipped through GRIA will in all likelihood never compete with that transported by truck, the value of the goods moving through GRIA will gain a greater share of the region total in the future. As the regional economy continues to transition to higher value added production industries, the requirements placed on GRIA's air cargo capabilities will increase, as will the ability of trucks and other vehicles to access freight facilities at the airport.

Water Transport

The Port of Rochester at the mouth of the Genesee River handles the only significant waterborne freight movement in the region. Inbound shipments of cement to be distributed through the state are regularly received here. Increasing the amount of goods transported along the Erie Canal has been raised by members of the community. Commercial activity along the Erie Canal is limited by varying controlling depths along the 524-mile long waterway. The New York State Canal Corporation, a subsidiary of the New York State Thruway Authority, is responsible for the maintenance and operation of the Erie Canal as well as entitling the transport of goods along it.⁵

⁴ 2002 United States Economic Census Commodity Flow Survey Metropolitan Areas: Rochester-Batavia-Seneca Falls, NY.

⁵ Genesee Transportation Council *Long Range Transportation Plan for the Genesee-Finger Lakes Region: 2005-2025*

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 strong healthy communities. Below is a brief description of many of the programs and activities in the region.

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 affiliated organizations 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. The diverse loan portfolio emphasizes job creation and business expansion.

4.2 New York State Economic Development Activities

New York State's economic development activities and programs are largely led and coordinated by Empire State Development (ESD). ESD provides programs and services aimed at assisting businesses in establishing a company in the state, relocating to or expanding existing operations in the state, growing their workforce in the state and in competing more effectively and profitably in domestic and international markets. ESD, and New York State, offer a range of programs and services to this end; several of which are outlined below.

4.2.a Empire Zones

An Empire Zone is an area designated by the New York State 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. With the recent Empire Zone designation in Yates County, each county within the Genesee-Finger Lakes Region currently has an Empire Zone.

Several changes to the Empire Zone program have been proposed during 2009. The primary change requires new businesses that are looking to gain Empire Zone certification, to meet a minimum level of investment for each dollar in state tax incentives they receive. Investment is measured as wages, benefits and capital investment and must meet at least a 10:1 ratio for manufacturing businesses and a 20:1 ratio for all other businesses. Businesses already having Empire Zone certification are required to demonstrate a ratio of greater than 1:1 in order to maintain their certification. An additional change to the Empire Zone program is the scheduled sunset of the program on June 30, 2010. At this point in time the program will be reevaluated and may be replaced by a new economic development program.

4.2.b Centers of Excellence

New York State's Centers of Excellence program is designed to create partnerships between universities, the private sector and the public sector to support the development of promising technologies with commercial applications and is intended to support rapid commercialization of scientific breakthroughs. Centers of Excellence, along with programs aimed at technology incubation and supporting high-technology and bio-technology, demonstrate the state's recognition of the importance of nurturing an innovation economy in New York State. The Centers of Excellence in New York State and their specializations are as follows; Bioinformatics and Life Sciences in Buffalo; Infotonics Technology in Canandaigua; Nanoelectronics in Albany; Information Technology on Long Island; Environmental Systems in Syracuse and Small Scale Systems Integration and Packaging in Binghamton. The Infotonics Technology Center is located within the Genesee-Finger Lakes Region and is detailed in section 4.5.c.

4.2.c 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. Since its inception the program has gone through four rounds of funding and established a total of 96 "Build Now-NY" sites throughout the State. The program has also established development profiles, which outline the general specifications required for the creation of sites in the following three business classes; High Tech Manufacturing; Warehouse/Distribution/Logistics Center, and Multi-Tenant Business and Technology Park. Build Now-NY sites within the region are listed in Table 21. The Crossroads Commerce Park and The Valley at Geneseo have also achieved certified Shovel Ready status.

Table 21 – Genesee-Finger Lakes Region Qualified Build-Now NY Sites		
Site Name	Location	Site Type
Silver Hill Technology Park	Village of Newark, Wayne County	Business/Commercial Park
Blackwood Business Center	Town of Farmington, Ontario County	Warehouse Distribution
Dansville Industrial Park	Village of Dansville, Livingston County	Light Industrial
Crossroads Commerce Park	Town of Avon, Livingston County	Warehouse/Distribution (Shovel Ready)
Apple Tree Acres Park Corporation	Town of Bergen, Genesee County	Multi-Tenant Business & Technology Park
Perry Commerce Center	Town of Perry, Wyoming County	Multi-Tenant Business & Technology Park
Rochester Technology Park	City of Rochester, Monroe County	Multi-Tenant Business & Technology Park
Valley at Geneseo	Town of Geneseo, Livingston County	Multi-Tenant Business & Technology Park (Shovel Ready)
Livingston Industrial Complex	Town of Avon, Livingston County	Multi-Tenant Business & Technology Park
Gateway II Business Park	Town of Batavia, Genesee County	Multi-Tenant Business & Technology Park
Medical & High Technology Business Park	Town of Batavia, Genesee County	High Technology Manufacturing
Buffalo East Technology Park	Town of Pembroke, Genesee County	Multi-Tenant Business & Technology Park
Genesee O-At-Ka Agri-Business Park	Town of Batavia, Genesee County	Ag-Technology Manufacturing
PEZ Lake Development Facility	Town of Romulus, Seneca County	Multi-Tenant Business & Technology Park

Source: Governor's Office of Regulatory Reform, 2009

4.2.d New York State Energy \$mart 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 levels. The New York State Energy Research and Development Authority (NYSERDA) provides technical and financial assistance for energy-efficiency, low-income residents and the research and development of new technology through its portfolio of New York Energy \$mart programs. These programs are funded by the System Benefits Charge, 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.

The New York State Energy Smart Program in the G-FL Region is administered by the Center for Environmental Information, Inc (CEI). CEI works with a select group of regional contractors, builders, retailers and manufacturers to provide educational outreach to residents and small businesses in the region in an effort to reduce consumption and promote sustainability.

4.3 Industry Clusters and Competencies

Finger Lakes Wired, through research performed by the Center for Government Research, has identified targeted industry clusters and competencies to focus its collaborative efforts on developing, supporting and marketing. The targeted cluster and competency industries are Information and Communication Technology; Optics and Imaging; Biomedical Research; Agribusiness and Food Processing; Advanced Manufacturing; and Alternative Energy.

4.4 Regional Workforce Development

Workforce development activities in the region are performed by three Workforce Investment Boards, community colleges and universities, Boards of Cooperative Educational Services (BOCES) and area school districts, as well as other organizations. Additionally, the region is in the midst of a four year Workforce Innovation in Regional Economic Development (WIRED) grant from the United States Department of Labor, which has facilitated widespread regional cooperation among various workforce development stakeholders as it relates to economic development.

4.4.a Finger Lakes Wired

The G-FL Region was one of the original 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. An additional twenty-six regions have since been funded at various levels within the second and third generations of WIRED, resulting in a total of thirty-nine regions receiving funding under 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 governmental, economic development, educational, workforce development, nonprofits and business organizations from the nine county Genesee-Finger Lakes region. This collaborative effort is led by its Governing Board and partner organizations, who have met regularly since May 2006, to support a strategic approach to regional economic development. They adopted a mission and vision, and have agreed to guiding principles, a strategic direction, and actions in support of this effort. Efforts are currently underway to sustain this collaborative approach to regional workforce and economic development.

The mission is to increase the region's capacity to support talent development for sustained economic growth. The strategic direction includes the following: energize the region's entrepreneurial economy; catalyze regional innovation and convert orphan or under-utilized technology into vibrant business ventures; educate and empower workers to successfully compete in the changing global economy; and build a collaborative regional education, workforce and economic development system. Strategic outcomes at the completion of WIRED include the following: increase private sector job growth relative to national average; increase average wages relative to national average; increase retention of 20 to 34 year old workers in region; and adoption of a regional identity resulting in collaborative networking and communication in support of regional economic strategies.

4.4.a.i Finger Lakes Wired Funded Initiatives

The following are some of the initiatives currently funded by Finger Lakes Wired. Much of the information provided comes from the Finger Lakes Wired progress reports which are published quarterly.

1. Expanding Science Technology, Education and Mathematics Camps

Effort to expand the offerings of Science and Technology camp-like programs that attract the region's youth to explore STEM offerings, inspire parents and educators to encourage STEM educational opportunities for youth and enhance awareness of STEM opportunities in the G-FL Region.

- 206 scholarships were provided for 2009 as follows:
 - Cornell Cooperative Extension of Ontario County, 4-H Camp Bristol Hills (24 students)
 - Cornell Cooperative Extension of Wyoming County, 4-H Camp Wyomoco Dairy Institute (75 students)
 - Finger Lakes Institute - Hobart & William Smith Colleges, Kids College (11 students)

- Infotonics Summer Science Camp (36 students)
- Rochester Institute of Technology, National Institute for the Deaf, Explore Your Future (25 students)
- Finger Lakes Council, Boy Scouts of America Sci-Tek Quest (20 students)
- Monroe Community College Pre-Collegiate STEM Career Track (15 students)

2. Educator Internships

Educators from the G-FL Region were invited to apply for internships. The Internship Committee received and reviewed all employer and educator applications.

- It is anticipated that 30 educators will participate in the August 2009 session which will consist of professional development, visiting businesses within the target growth industries and developing PowerPoint presentations to connect this information with their students.

3. Strategic Growth through Immersion Program-RIT

Emphasis is placed on selecting participants with expertise in industries such as Optics/Imaging, Biotech/Life Sciences, Food/Agriculture, Alternative Energy and other clusters. Rochester Institute of Technology is working with regional partners to promote the program to area businesses through existing networks. High growth, small enterprises are supported through this immersion program.

Phase II of the program launched in early 2009 with 30 participants. Surveys of early participants have revealed that 40% of companies have performed sustainable, quality investment after completing the program and 90% have implemented the skills learned through the course into their daily operations.

4. Predictive Analysis for Business Attraction

This project will help identify high growth opportunities, perform in-depth research on each identified company, and set up mission trips for leaders to visit targeted companies in order to match regional assets with industry leaders, creating more opportunities for growth.

More than 65 companies have been identified that could benefit by connections to the region in relation to the Optics/Imaging, Biotech/Life Sciences, Food/Agriculture, Advanced Manufacturing and Alternative Energy industry clusters.

Additionally available site locations in the region can be found online using ZoomProspector which provides real-time information about a specific site location, including demographics, workforce data and industry information. Since going online ZoomProspector has been viewed over 103,000 times.

5. Developing a Regional Apprenticeship System

Finger Lakes, Genesee, and Monroe Community Colleges established an apprenticeship system to support the biotechnology, health care, optics and printing industries in the

region. The collaboration amongst the colleges provides businesses with a pipeline of skilled workers in high demand industries. Coursework has been ongoing with the program showing growth in enrollment since its inception.

6. Small Business Innovation Research Outreach

The project reaches technology and manufacturing firms throughout the region to provide training and assistance to improve regional success with the Small Business Innovation Research and Small Business Technology Transfer Programs from the federal government. A total of six firms have received funding totaling \$1.6 million in federal dollars through the Small Business Innovation Research Outreach program.

7. Scholarship Program

The Scholarship program provides up to \$25,000 in matching resources to businesses that invest in worker skill improvements in key industry segments of alternative energy, biotech and life sciences, food and agriculture, optics and imaging, advanced manufacturing, information technology, engineering, business services, and health care. The program has allowed employees to develop transferable skills and industry recognized credentials.

- Sixty companies received funding in the first quarter of 2009 and 935 employees were trained.
- Since the program launch in September 2006, Finger Lakes Wired has allocated \$4.1 million for 240 businesses to increase the skills of 6,500 workers with \$6.7 million in matching funds provided by business.

8. Technology & Innovation Commercialization

The project trains researchers, students, faculty and entrepreneurs with the skills required to launch new businesses and commercialize new technologies. The program also demonstrates how to integrate research and product design with the benchmarks associated with key industries.

Participants and technologies are identified for assessment through a “tech clearinghouse” leveraging resources from Excell Partners, High Tech Rochester, Rochester Institute of Technology, University of Rochester and the Cornell Agriculture and Food Technology Park. Over 100 potential entrepreneurs attended five seminars and workshops in the first quarter of 2009. To date 845 entrepreneurs and innovators have received training since the technology commercialization program began.

9. The Entrepreneurs Network (TEN)

The program is designed to optimize exposure to and interaction with leading entrepreneurial experts to introduce local entrepreneurs to new ideas and attract needed capital investments. To this end participants attend a boot camp, workshops and panel events all structured to prepare entrepreneurs to grow their business upon completion.

- TEN has served more than 135 executives from 120 different companies spanning the nine-county region during the six classes that have been completed. The seventh class is being condensed from six months to four months to provide programs to more individuals.

10. Young Entrepreneurs Academy

The Young Entrepreneurs Academy teaches students (aged 16-18) the process from establishing a business or social enterprise, helping them develop entrepreneurial skills and build ties throughout the community.

During the first quarter YEA! Launched its first Wired supported high school program site at Victor High School, and students have begun work with their business mentors to develop and refine their business plans. Students at SUNY Geneseo also pitched their businesses to investors to compete for funding to begin their businesses in early 2009.

As of the first quarter of 2009, YEA! was in the process of recruiting student participants for its September 2009 expansion into nine school districts across the Finger Lakes region. A total of 126 students are expected to be impacted at the high school sites.

11. Regional Cluster and Competency Networks

This program connects key leaders among high tech industry clusters including biotechnology, information technology, life sciences and optics to facilitate the development of new opportunities. The Technology Council of Upstate New York (TCUNY) coordinates the connections amongst the 18 associations which represent over 1,000 businesses throughout Upstate New York.

Multiple events have been held in the first quarter of 2009 and a subcommittee has been established to promote the region as one of the top ten technology regions in the country.

12. Regional Skills Alliances and Career Readiness Credential- FLW, GLOW, RW

The Regional Skills Alliance program is a consortium of business, education, workforce and other economic development partners that work closely to address problems facing targeted regional industries. The program is based upon the model created by the Finger Lakes Advanced Manufacturing Enterprise (FAME). The initial targeted industries within the region will be Advanced Manufacturing and Health Care/Human Service Industries with the three regional workforce investment boards in the region serving a critical role in the delivery of the program.

13. Emerging Entrepreneurs Program- GCC, MCC

The program is a joint effort between Genesee Community College and Monroe Community College designed to produce entrepreneurial start ups within the region. Both colleges collaborated in the formation of the curriculum which is intended to provide students with the necessary background to enable them to establish new businesses. Courses are scheduled to begin in summer 2009.

14. Increasing Emerging Worker Skills Program

Funding was provided in 2009 to five Increasing Emerging Worker Skills Programs whose goals are to provide youth ages 16-21 with the skills and training necessary to succeed in high-growth industries. Five groups have received funding in the operation of five programs which will serve a total of 280 youth. The groups receiving funding are:

- The Academy for Career Development, Start Here for a High Tech Career (30 youth)
- Finger Lakes WIB, Start Here for a High Tech Career (30 youth)
- GCC, Pathways to Careers in Bio-tech, Life Sciences and Health Care (120 youth)
- Rochester Educational Opportunity Center, Introduction to Health Careers (30 youth)
- Urban League of Rochester, Summer Technical Institute and Tech Clubs (70 youth)

15. Workforce Excellence Regional Center (WERC)- FLCC, GCC, MCC

The goal of the WERC initiative is to connect workers and students from each community college with additional programs and classes that are only offered by the other two schools. The program allows students to utilize distance learning to attend classes online that they otherwise would have to drive across the region to attend. This delivery method will better meet the needs of regional businesses by training a larger pool of workers and will help reduce the need of each community college to offer overlapping programs. Not only will this lower costs, but it will also increase the quality of specialized courses by allowing all resources to be focused on one particular college.

4.4.b Workforce Investment Boards

The region is served by three Workforce Investment Boards (WIBs) with each working to link job seekers with in-demand local industries and to provide the programs needed to train workers to meet the needs of businesses. The WIBs operate under the Workforce Investment Act of 1998, which established new methods of service delivery for employment and training. As part of the Workforce Investment Act each community is associated with a local WIB. The three WIBs serving the Genesee-Finger Lakes region are Genesee/Livingston/Orleans/Wyoming Workforce Investment Board, Finger Lakes Workforce Investment Board, and Rochester Works. Below is a brief overview of each of these WIBs.

4.4.b.i Genesee/Livingston/Orleans/Wyoming Workforce Investment Board

The Genesee/Livingston/Orleans/Wyoming Workforce Investment Board (GLOW WIB) provides workforce development services to residents of Genesee, Livingston, Orleans and Wyoming Counties. The GLOW WIB aims to connect job seekers with emerging industries, regional economic development activities, and existing local businesses. To

this end, the GLOW WIB has led discussions surrounding skill needs for emerging workers; provided business grants for job training; provided one stop employment services to local businesses; administered over \$400,000 in individual training accounts; and placed nearly 4,000 individuals in jobs. Assistance under the American Recovery and Reinvestment Act has provided funding to continue investments with an emphasis being placed on training for growth industries such as computer/technology, advanced manufacturing and construction. Additional emphasis has also been placed on serving the youth population and providing them with the skills they need to enter the workforce.

4.4.b.ii Finger Lakes Workforce Investment Board

The Finger Lakes Workforce Investment Board (Finger Lakes Works) provides workforce development services to residents of Ontario, Wayne, Yates and Seneca Counties. Finger Lakes Works coordinates with local businesses to develop needed trainings to close skill-gaps and prepare local workers for available and growing jobs. Various workshops, trainings and an annual job fair are all conducted with this goal in mind. Between July 1, 2007 and June 30, 2008 over \$375,000 was administered in individual training accounts and over 9,800 individuals were linked with jobs. Finger Lakes Works also operates the Finger Lakes Advanced Manufacturers Enterprise (FAME). FAME is a partnership amongst manufactures to increase development and prosperity in the region through manufacturing networking and preparing youth for careers in manufacturing. FAME provides a forum for local manufacturers to discuss common issues and the outlet through Finger Lakes Works allows businesses to work together to address these issues. Through FAME career exploration programs have been established at local schools to expose students to careers in skilled trades and manufacturing careers. The Finger Lakes Workforce Investment Board also launched a new Health and Human Services cluster in 2009. Assistance under the American Recovery and Reinvestment Act provided Finger Lakes Work with additional funding to continue training unemployed, dislocated workers, and the youth population.

4.4.b.iii Rochester Works

Rochester Works provides workforce development services to residents of Monroe County. Rochester Works looks to partner with existing organizations to integrate its services to support job seekers and businesses alike in growing sectors such as advanced manufacturing, information technology, engineering, health care and optics. Training and support to job seekers are provided through workshops, networking opportunities and youth training and are delivered through the one-stop career centers. Employees of existing businesses are also able to take advantage of training offerings to upgrade skills. In 2008 Rochester Works connected individuals to over 7,900 positions and trained over 3,400 individuals at 75 different events. Funding from the American Recovery and Reinvestment Act is helping Rochester Works manage the 80% increase in individuals needing assistance.

4.5 Regional Marketing, Research and Entrepreneur Activities

4.5.a Greater Rochester Enterprise

Greater Rochester Enterprise (GRE) is a public-private partnership established to professionally market the Greater Rochester region as a competitive, high-profile place for business location and growth. Its efforts support business attraction and expansion, as well as entrepreneurship and innovation. GRE collaborates with businesses, universities, not-for-profit organizations and government leaders to ensure a unified approach to regional economic development.

GRE is supported by a team of private and public sector leaders, who are dedicated to improving economic performance across the nine-county Genesee-Finger Lakes region.

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, 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.

GRE works in a collaborative manner with economic development partners in Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates counties and the City of Rochester to support business attraction and expansion efforts throughout the nine-county region. The partners 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.

In 2007, GRE unveiled a web-based, interactive tool that allows users to view available commercial, industrial and retail sites and buildings throughout the region, including building information, as well as data on workforce demographics, transportation, and public service amenities. This tool is intended to provide prospective commercial, industrial or retail tenants a holistic view of demographic, business and infrastructure features and characteristics of a potential building or site.

4.5.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.

4.5.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.

Subsequent funding in 2007 from the U.S. Department of Commerce and the Economic Development Administration supported implementation efforts around the following activities:

4.5.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 the Materials Processing/Industrial Machining and Systems 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.

Focus has also been placed on the issue of sustainability. RIT-CIMS has worked to establish the Systems Modernization and Sustainment Center, The Golisano Institute of Sustainability and the New York State Pollution Prevention Institute. All three focus on ways to increase efficiency and reduce waste with an eye towards the future. The Reinventing Upstate Manufacturing project, currently underway, is utilizing the lessons learned from these and other CIMS groups and applying them to local manufacturers. The involvement of local businesses ensures that research is viable for the real world and meets the needs of manufacturers in upstate New York.

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. Efforts will continue to bring this collaborative project to fuller fruition with the enlistment of cluster- based associations to assist in greater participation by effected businesses. As the RMI model is more fully tested, it could be utilized with other regional entities such as county governments in order to help businesses fully realize the benefits of the Roadmap Project focus.

4.5.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

4.5.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 to 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

4.5.b.ii.c 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 the maximum 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; and implementation of recommendations.

4.5.b.ii.d Golisano Institute for Sustainability

The Golisano Institute for Sustainability was established to address the deterioration of the global environment. The Institute provides educational outreach and research expertise to assist businesses in sustainable production. The effort helps to conserve energy and natural resources and makes businesses more efficient, allowing them to compete in the global economy and save and create jobs in western New York. The institute also partners with local schools to educate faculty and students in sustainability, helping future generations develop the knowledge and skills necessary for the future. Operating under the Golisano Institute for Sustainability are the Ph.D. program in Sustainability; the Sustainable Systems Research Center; the Systems Modernization and Sustainment Center; and the Center for Sustainable Energy Systems.

4.5.b.ii.e New York State Pollution Prevention Institute

The NYS Pollution Prevent Institute aims to prevent pollution through resource efficiency achieved through sustainable technologies, improving the environmental quality of products, reducing waste, reducing the use of toxins and reducing the impact of life-cycles. The institute partners with RIT, the University at Buffalo, Clarkson University, Rensselaer Polytechnic University and the ten regional technology development centers across New York State. The mission is to utilize these partnerships to research and develop best practices; share information; and develop curriculum and training to bring the findings to local businesses. Like the Golisano Institute the goal is to create sustainable businesses within New York to provide jobs and investment.

4.5.b.ii.f Systems Modernization and Sustainment Center

SMS focuses on the development of technologies aimed at increasing the life-cycle of equipment and reducing the cost of operations. Programs under SMS include Reliability Centered Maintenance, which focuses on minimizing functional failures, Asset Health Management which monitors equipment and highlights possible failures before they occur, Material Aging which aims to understand the aging effects of materials and works to mitigate these effects through technology and Life-cycle Engineering and Economic Decision System, which utilizes software tools to lower ownership costs of equipment.

4.5.b.ii.g Reinventing Upstate Manufacturing

The Reinventing Upstate Manufacturing project aims to link clean technologies and sustainable manufacturing directly with Upstate New York manufacturers to help reverse the trend of declining manufacturing employment in the region. The project takes advantage of the work already being done by the Golisano Institute of Sustainability, the New York State Pollution Prevention Institute, the Knowledge Clearinghouse, the Innovation Test Bed and other CIMS initiatives. Utilizing the research and expertise of each of these institutions, Reinventing Upstate Manufacturing works with local manufacturers to identify green opportunities and helps to position local firms to take advantage of these opportunities. Reinventing Upstate Manufacturing will continuously adapt to changes in the economy to foster cluster development in the region.

Implementation of the Roadmap activities continues to be an on-going activity requiring continuous funding. RIT-CIMS will continue their efforts to secure funding to maintain and develop the programs necessary to achieve the goals of the Roadmap strategy.

4.5.c Infotonics

The Infotonics Technology Center, located in Canandaigua, is a collaborative effort of academic, industry and government. The objective of the Center is to create and support technology transfer and deliver innovation in Micro-electromechanical systems helping to provide a platform for technology breakthroughs to boost regional economic development. For more information on Infotonics see section 5.6.

4.5.d Cornell Agriculture and Food Technology Park

The Cornell Agriculture & Food Technology Park, known as the Technology Farm, is a 72-acre research park, located adjacent to the NYS Agriculture Experiment Station. Opened in November, 2005, the Park is designed to foster the creation of innovative technologies related to agriculture, bio-based and food industries. In this environment, start-up companies, small businesses, and large multinational companies can leverage the resources and intellectual capital available at Cornell University, the New York State Experiment Station and other regional centers of expertise.

The Cornell Agriculture and Food Technology Park campus features, a 20,000-square foot, multi-tenant flex technology incubator termed the Tech Farm. In 2006 the Park developed three pilot production plant areas, including a new Food and Beverage Innovation Center. These pilot production areas enable Park tenants to take newly developed products from the laboratory into a commercial production environment. In 2007, the Tech Farm was named Intelligent Facility of the Year by the Intelligent Community Forum in a highly competitive, international awards process. Currently, there are eleven businesses calling the Technology Farm their home and the facility is at 70% occupancy. Additional information about the Cornell Agriculture and Food Technology Park is available in section 5.6.

4.5e The Entrepreneurs Network

The Entrepreneurs Network continues to work with executives from new ventures in Upstate New York to provide them with the needed business expertise to succeed and grow their businesses within the region. Classes work with 15-20 students over the course of 4-6 months to provide them with training in developing a business plan, giving presentations to potential investors, and strategies on how to successfully enter the market to maximize revenue. A total of 135 individuals have been assisted from 120 different companies since the program was established. Currently TEN is offering its 7th class.

4.5f Rochester Procurement Technical Assistance Center

PTAC was established by the United States Department of Defense to bring additional vendors into the government system to help increase competition in procurement and therefore increase the quality of services received, while at the same time lowering costs. Rochester PTAC works with local companies to help them tap into the government market. Workshops are provided outlining tips for submitting bids and securing contracts. Individual counseling sessions are also available for companies looking for assistance with the rules, regulations and requirements of submitting a bid and becoming a government vendor at the local, state or federal level.

4.5g High Tech Rochester

High Tech Rochester (HTR) is a not-for-profit organization funded primarily through the New York State Office of Science, Technology and Innovation (NYSTAR). HTR works closely to assist new venture and established technology companies in the creation or expansion of their business through the development of business plans and with assistance in securing investors. HTR has two incubator buildings, the Lennox Tech Enterprise Center and the Rochester BioVenture Center, which is the first technology incubator with a wet lab in the region. Assistance to established manufacturing companies is provided through the Manufacturing Extension Partnership, which helps companies become more efficient and therefore more competitive in the global market.

4.6 Infrastructure

For the purpose of the CEDS 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.

4.6.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 each county except for Yates County; however a study has been recently completed to assess the viability of public transportation in Yates County.

The regional organization 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). GTC is 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 are the Long Range Transportation Plan, Unified Planning Work Program and the Transportation Improvement Program. These documents address both the long and short term transportation challenges facing the region and propose actions to address these items.

4.6.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. SAFETEA-LU 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: 2007-2027 (LRTP: 2007-2027)* was adopted in June 2007. GTC is currently developing the next LRTP which will plan through 2035.

4.6.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.

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. The UPWP is updated annually.

Two components that were funded through the UPWP were the Regional Goods Movements Strategy and the Transportation and Industrial Access site reports. The Regional Goods Movements Strategy aims 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 recommendations will be prioritized to ensure implementation.

Transportation and Industrial Access site reports have been completed for ten business parks, one from each of the nine counties in the region and the City of Rochester. These reports aim to provide recommendations regarding the improvement of transportation access and entry points in the effort to attract and expand businesses at each industrial park. Site reports were completed on the following business parks in the region:

City of Rochester (Driving Park Avenue Site)
Genesee County (Batavia Gateway II Corp. Park)
Livingston County (Dansville Industrial Park)
Monroe County (Village Square)
Ontario County (Geneva Enterprise Dev. Center)
Orleans County (Holley Business Park)
Seneca County (Cadbury-Schweppes)
Wayne County (BEH Industrial Park)
Wyoming County (Hillcrest Industries)
Yates County (Horizon Business Park)

4.6.a.iii 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 a dynamic document; amendments occur when new projects are identified through federal discretionary programs or modifications to existing projects are deemed necessary. The 2007-2012 TIP was adopted in June 2007. The TIP is updated every two years.

4.6.a.iv High Speed Rail

One of the transportation funding priorities of the new federal administration is high speed passenger rail. While much work remains to be done, funding is being pursued to develop high speed passenger rail service along the Empire Corridor between Buffalo, NY and Albany, NY. A high speed rail corridor running through the region would help expand the market for both consumers and employees and further “shrink” the region through the reduction in travel times.

4.6.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. The identification, connection and development of telecommunications infrastructure is critical in the support of 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 and can help improve quality of life. Within the G-FL region there is a lack of consistent cellular telephone service. Inconsistent or unavailable cellular service can impede not only economic development, but can also prevent timely communication in instances where public safety or security is jeopardized and prompt attention is required.

The region has identified telecommunications as crucial to economic development and strategies to bolster it are being pursued both regionally and at the county level. Several counties have created, or are in the process of creating, databases of their respective telecommunications network. Many counties have also identified further planning and implementation as part of their CEDS priorities, discussed in Chapter 5. Several telecommunications initiatives that are in progress is the development of a wireless data network within Monroe County and the construction of a fiber optic ring in Ontario County.

New York State is also making a push towards broadband development. The Governor’s Office has established the Broadband Development and Deployment Council to compile a map of broadband accessibility statewide to help leverage available funds from the American Recovery and Reinvestment Act and target funding to those areas with the highest need.

4.6.c Energy

4.6.c.i Traditional Energy

The Genesee-Finger Lakes region is home to one nuclear power plant, the Robert E. Ginna Nuclear Power Plant in Wayne County and one coal-fired power plant; AES Greenidge in Yates County.

The utility companies that serve the Genesee-Finger Lakes region are Rochester Gas & Electric (RG&E), New York State Electric and Gas (NYSEG) and National Grid. National Grid provides electric service for all of Genesee and Orleans County and parts of Livingston, Monroe, Ontario and Wyoming Counties. RG&E provides service in all of Genesee and Monroe Counties, and parts of Livingston, Ontario, Wayne and Wyoming Counties. NYSEG provides service within all of Seneca and Yates Counties and in parts of Wayne, Ontario, Livingston, Wyoming and Orleans Counties. Natural Gas service within the nine-county region is provided by either RG&E or NYSEG.

Each of the utility companies within the region works closely with economic development officials to assist in providing energy incentives and other programs to facilitate the attraction and retention of business and industry within the region. The section below provides a general overview of the economic development programs currently offered by each company.

RG&E/NYSEG- RG&E and NYSEG offer a variety of economic development programs which include rate incentives and non-rate assistance. Rate assistance programs provide delivery rate discounts on qualifying loads. Non-rate assistance programs provide grants for electric infrastructure for qualifying capital improvements. Additionally, non-rate programs provide supplemental assistance to certain NYSERDA programs for energy efficiency improvements.

These assistance programs are intended to help attract new businesses to the service territory and support the retention and expansion of existing business in the RG&E and NYSEG service territories. For more details regarding these programs, please visit their website at www.lookupstate.com.

National Grid- A large number of economic development programs and incentives are available for National Grid customers. Energy pricing incentives are available through the Empire Rates program and several growth and attraction incentives exist to encourage businesses to expand or relocate to New York State. Programs are also in place to assist companies that are in need of revitalizing older facilities. Incentives are also available for capital investment, brownfield redevelopment and industrial building investment. Additional information regarding these programs is available at http://www.shovelready.com/sr_2005/ed.asp

4.6.c.ii Alternative Energy

Wind energy and the development of wind turbines remains a priority within the region. G/FLRPC is the contact for a contract with New York State Energy Research and Development Authority 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 most NYSARC members regarding wind energy. G/FLRPC, along with most NYSARC members, 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. Several wind farms are already present within the region and a push has begun to develop more efficient methods of connecting the electricity generated from the wind farms to the national energy grid. Businesses within the region are also working on small scale wind turbines to alleviate size concerns and make small-scale projects viable.

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. Beyond the current and planned industrial wind farm projects in the region, Greater Rochester Enterprise has identified more than sixty companies that have capacities to make wind turbine components. Furthermore, 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. In addition the Rochester Institute of Technology Center for Integrated Manufacturing Studies has been working with many alternative energy companies in efforts to improve efficiency and reduce waste materials.

Individual alternative energy projects are also moving forward in the region. The ethanol plant in the Town of Shelby (Orleans County) is in operational status. The plant utilizes existing technology for using corn to produce ethanol and is also taking advantage of new developments in cellulosic ethanol production and using woody debris and plant fiber to create ethanol. Other alternative energy projects within the region include the Mill Seat landfill in Monroe County and the Seneca Meadows landfill in Seneca County, which are both utilizing methane produced from the landfills for power generation. The Wayne Industrial Sustainability Park has also become a model in the promotion of alternative energy uses and the connection between alternative energy and economic development.

Many businesses and organizations within the region, are also taking steps toward being environmentally friendly. 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. Additionally, the East Rochester School District has installed a fuel cell to meet its power needs and the City of Rochester has completed

the first LEED-certified green municipal building in the region with the Felix Street Water Operations Center. Other LEED-certified projects in the region include the Medical Arts Building, Strong National Museum of Play, RIT Cast Building, Golisano Library at Roberts Wesleyan College, Frito-Lay Service Center, CFNA Rochester and the HSBC Dewey Avenue branch. Furthermore, the region has sixty-two (62) registered LEED projects, which have yet to be completed and certified, but are aiming for LEED certification.⁶

4.6.d 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.

In 2007 in the City of Rochester, the average production at the Hemlock Filtration Plant was 37 million gallons per day (MGD). Consumption in the City averaged 22.6 MGD for its population of 219,000, which represents 60,200 retail accounts. The Base Charge for water was \$2.77/1,000 gallons, although this charge varies between residential and bulk rate users.⁷ Water supply for the City of Rochester is supplemented by water from Hemlock and Canadice Lakes, two Finger Lakes which are located south of the city.

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. Waterline extension projects have been successfully funded through a combination of state and federal rural development grants with partial funds contributed by participating

⁶ United States Green Building Council <http://www.usgbc.org/LEED/Project/CertifiedProjectList.aspx>

⁷ City of Rochester, NY Bureau of Water. 2007 Water Quality Report (Water Supply ID # NY2704518).

municipalities. Finally, in 2009, the City of Rochester will finalize its plans for compliance with an Environmental Protection Agency (EPA) regulation that will impact the City's three drinking water storage reservoirs.⁸

4.6.e Wastewater

4.6.e.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*. Over 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).⁹ Municipal treatment facilities in the Monroe County area are routinely evaluated as to their effectiveness and, when feasible, are consolidated into the Pure Waters system, thereby drastically reducing the costs of sewage system operation to local residents.

⁸ City of Rochester, NY Bureau of Water. 2007 Water Quality Report (Water Supply ID # NY2704518).

⁹ Northeast Midwest Institute. Rochester New York Pure Waters District Combined Sewer Overflow Abatement Program. Last viewed online 3/10/08 at <http://www.nemw.org/glici/RPWDCSCSOAP~1.pdf>.

4.6.e.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. Both industrial and residential wastewater can be treated effectively through such systems, although tertiary systems are preferred when handling high amounts of industrial and/or urban wastewater. The capacity of these facilities and the treatment processes employed within them are routinely assessed by state and local officials in order to ensure that the systems in place are adequate to meet the demands of the households and businesses being serviced by them. In some instances, older treatment facilities are being brought off-line in an attempt to increase service and cost efficiency through facility consolidation. In other instances, new facilities are being constructed in order to meet the 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 benefits 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 likely 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 these data to regional partners who are involved in marketing sites for industrial and business development.

4.7 Brownfield Redevelopment

According to the Environmental Protection Agency, brownfields are abandoned, idle, or under-used industrial and commercial sites where real or perceived contamination has complicated redevelopment. Brownfield revitalization and redevelopment 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 (BOA) Program provides financial and technical assistance to municipalities that can be used to complete revitalization plans and implementation strategies for areas affected by brownfield sites. BOA projects in the region include areas in the Village of Perry in Wyoming County and the Town of Gates in Monroe County. The Village of Perry program is anticipated to facilitate redevelopment of potential brownfield sites located in the village's business district so as to stimulate economic development and job creation while also promoting compact, in-fill development. Monroe County is undertaking a BOA study for the Airport/Buell Road area, a 96 acre site in the Town of Gates and for an area in the eastern portion of the City of Rochester with a high concentration of potential brownfield sites. 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. Brownfield redevelopment is also occurring with the region outside of the BOA program. The City of Rochester intends to complete an Implementation Strategy and Site Assessment for an approximate 30-acre study area characterized with 13 brownfield sites located on Anderson Avenue and Goodman Street. The City also is in process of a study to examine a 394-acre site west of the Genesee River at the intersection of Lyell, Lake and State Streets, which may include up to 150 potential brownfield sites. The City of Rochester also maintains a brownfield revolving loan fund to address brownfield redevelopment.

Many counties within the region have also been actively working to secure funding to address brownfield issues within their communities. Orleans County has received grant funds from the New York State Department of Environmental Conservation (NYSDEC) to investigate environmental contamination at a 35.6 acre property in the Village of Medina, which is anticipated to have high levels of lead contamination. Seneca County is involved in clean up programs for several brownfield sites within the County and is working to secure a Brownfield Opportunity Areas grant to address remediation and redevelopment. Ontario County is pursuing several potential brownfield redevelopment opportunities and is hoping to begin projects in 2009. Wyoming County has identified several brownfield redevelopment projects as part of their priority projects listed in Chapter Five; which includes the Perry Brownfield Opportunity Program. Wayne County has established a brownfield cleanup program, with an initial project underway in the Town of Sodus. Work is also being done by the Wayne County IDA to address potential brownfield sites, which are delinquent on taxes, in an attempt to redevelop the parcels and return them to the tax-rolls. Brownfield remediation work is also ongoing in Yates County at the former NYSEG plant on Water Street in Penn Yan, in the hopes of preparing the site for future development.

Additional brownfield sites exist in many towns and villages in the region, and 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 the City of Rochester has been successful with its brownfield assistance program, which provides support for businesses and developers in the investigation of potential redevelopment sites for contamination. The objective of this program is to provide a way for businesses and developers to obtain the environmental information needed to make redevelopment decisions without taking on the financial burden of the investigation costs. Funding is provided by the Environmental Protection Agency and potential developers are not financially responsible should they decide to walk away from a site. The program has completed over 25 projects since its creation, helping to return these properties to the tax rolls. The success of the City of Rochester's brownfield development program has opened up discussions about pursuing funding in collaboration with Monroe County and G/FLRPC to expand the program to the nine-county region.

4.8 New York State Canal System

4.8.a Erie Canalway National Heritage Corridor

The Erie Canalway National Heritage Corridor consists of the New York State canal system and each of the communities that are located along it. The canal system includes the following canals: Erie, Champlain, Oswego and Cayuga-Seneca.

4.8.b New York State Canal Corporation

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 twelve 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.

4.8.c Western Erie Canal

The Western Erie Canal Heritage Corridor includes the counties of Erie, Niagara, Orleans, Monroe and Wayne and is part of the larger Erie Canalway National Heritage Corridor and the New York State Heritage Area System. The Western Erie Canal Heritage Corridor Management Plan was adopted by the New York State Office of Parks, Recreation and Historic Preservation in August 2005. The objectives of the management plan are to promote the development of a vibrant regional economy, enhance the overall quality of life throughout the region, promote natural resource conservation and the re-use of existing buildings and infrastructure, and increase public appreciation of the unique natural and cultural heritage resources found along the Western Erie Canal Heritage Corridor.

The Western Erie Canal Heritage Corridor will be positively impacted by not only being included in the New York State Heritage Areas System, but through support from the federal Canalway initiative, New York State Canal Corporation, and the Erie Canal Greenway and Empire State Greenway. The western portion of the Erie Canal, which includes the G-FL region, stands to flourish with increased tourism and economic development opportunities.

The Western Erie Canal Alliance (WECA) was formed in March 2006 as a non-profit corporation to implement the management plan. WECA has contracted with G/FLRPC to fulfill the duties of the Western Erie Canal Main Street Program (WECMSP) Coordinator. The intent of the WECMSP is to revitalize historic business centers along the heritage corridor, following the model of the National Trust Main Street Center™ (NTMSC), a division of the National Trust for Historic Preservation.

In 2008, the Village of Albion in Orleans County, Village of Lyons in Wayne County, and City of Lockport in Niagara County were announced by WECA as the three inaugural designated Main Street communities of the WECMSP. Those communities have begun to receive high-quality technical assistance and training from the NTMSC and the WECMSP. Services provided to the newly-formed local Main Street programs (Albion Main Street Alliance, Lockport Main Street, Inc., and Lyons Main Street) include: Main Street Basic Training and New Manager Orientation, Resource Team Visits, and Work Plan Workshops.

A follow-on grant from the Environmental Protection Fund - Local Waterfront Revitalization Program was awarded to continue and expand the Western Erie Canal Main Street Program.

4.9 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 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 downtown revitalization plans for the Villages of Macedon and Medina and the aforementioned WECMSP. Additionally, the Preparing Village Main Streets for Planning: *Guidebook for the Planning of Main Streets and Commercial Districts* was finalized in 2008.

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, to encourage revitalization and preserve the vitality and character of main streets throughout the counties.

4.9.a Business Improvement Districts

Business Improvement Districts exist within the region to assist in the economic development efforts of their communities and assist in the attraction of business and investment. The following section provides a brief overview of the activities being done by each BID and provides a sense of how they can be utilized as an economic development tool.

Batavia Business Improvement District- The Batavia BID is in the process of completing \$750,000 worth of streetscape improvements along Ellicott Street, a major gateway into the City. Façade improvements are also going on through the City as well and a focus is being placed on community events to help bring visitors and residents into downtown. The BID has also been continuing its efforts regarding business attraction and retention.

Canandaigua Business Improvement District- The Canandaigua BID continues to maintain a revolving loan fund to assist businesses with needed equipment purchases and to create jobs. Work is also ongoing to secure grant funding for streetscape, façade and signage improvements. The Canandaigua BID is also working closely with local economic development partners to assist in the attraction and retention of businesses.

Geneva Business Improvement District- The Geneva BID continues efforts to fill first-floor vacancies. The BID is also focused on façade improvements and sponsors events throughout the year to draw people into the City. Additionally, the BID works with local economic development partners in efforts to market the area and bring in the unique retail stores that fit within the character of the district.

Webster Business Improvement District- The Webster BID continues sponsoring and holding events throughout the year to bring residents and visitors into the Village. Additionally the BID, along with the School District, Village and Chamber, is a part of the Webster Community Coalition for Economic Development, a coalition of local economic development partners. The BID is also focused on façade renovations and streetscape improvements and is continuously looking to obtain funding for these initiatives.

Williamson Business Improvement District- The Williamson BID secured a Main Street grant to address façade improvements and streetscape work, including new benches, bike racks and other pedestrian enhancements. Work is also ongoing to attract new businesses to fill vacancies within the district.

4.10 Tourism

The tourism promotion agencies within the region are charged with marketing the region to attract visitors and to draw consumer spending in the region. Tourism has a huge impact within the region through consumer spending on food, entertainment and lodging as well as through the job creation and investment of the tourism industry. Investment and support of each of the many attractions in the region improves the quality of life of the region helping to retain and attract an educated workforce as well.

Attractions in the region include; Letchworth State Park, Darien Lake, the Finger Lakes, the Erie Canal, the City of Rochester as well as local wineries, outdoor activities and the many town and village events and festivals held throughout the region.

Many of the region's tourism promotion agencies are looking to connect attractions and destinations together in order to keep visitors in the region longer. An effort has also been made to establish package deals of attractions to encourage people to travel throughout the region. Some of the Tourism Promotion Agencies within the region are also beginning to take advantage of social networking sites, such as Facebook and Twitter, to help promote the region.

4.11 Regional Land Use

The Finger Lakes Land Use Project has been under development by G/FLRPC. The research and 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 and woods) and cultural (i.e. farms, villages and cities) landscapes of the Finger Lakes.

One phase of the project focuses on data development and analysis. Three primary indicators were selected. The first is existing and potential public sewer and water provision, which has involved the on-going acquisition and development of 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 the spectrum of open space resources and will be used to show how much land is protected from development and what form that protection takes. The third indicator concerns village and micropolitan centers. The vitality of the villages and small cities of the region are important for many reasons including economic development. This indicator seeks to measure the vitality of downtowns and their contribution to the existing and potential tourist market. 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.

Additionally, a cost of municipal services analysis is being conducted region wide to determine the portion of services each land use receive and the monetary contribution each land use makes to their municipality.

Additional work is also being conducted with municipalities throughout the region including the Villages of Macedon and Medina in the development of downtown revitalization plans for each community as well as the Town of Ovid in a strategic visioning process. The downtown revitalization plan for the Villages of Macedon and Medina will consist of three parts: a physical plan, economic plan and implementation plan. Surveys will be conducted to determine the existing physical and economic conditions of the Village downtown and this information will be utilized to develop a strategy and implementation plan for each Village.

4.12 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.

4.12.a Rochester Embayment Remedial Action Plan

The Rochester Embayment Remedial Action Plan (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>.

4.12.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 Annual Reports and implementation of minimum measures.

There are presently 38 regulated MS4s in the Genesee-Finger Lakes Region. Twenty-Nine (29) of those are members of the Stormwater Coalition of Monroe County. Information on members, programs and activities of the Coalition can be found online at <http://www.monroecounty.gov/eh-stormwater.php>. The remaining nine regulated MS4s are dispersed across Ontario and Wayne Counties and are coordinated by the Ontario-Wayne Stormwater Coalition. Information on members, programs and activities can be found online at <http://www.gflrpc.org/ontariowaynestormwatercoalition.htm>.

4.12.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 and Oak Orchard River watersheds.

Watershed planning helps increase quality of life, quality of uses, land use management and land value. A watershed plan prioritizes issues and helps target funding and allows for restoration and protection of resources. Plans also call attention to the delicate balancing act associated with uses and priorities such as fishing, boating, drinking water, irrigation, aesthetics, agricultural uses, industrial uses and bathing/swimming and help to increase coordination and cooperation.

The general watershed management plan development steps include assessing current watershed conditions, reaching consensus on desired future, identifying and prioritizing threats, identifying primary sources of pollution, assessing current controls, identifying where more actions are needed to achieve goals, and identifying what, who, how, when, and where in the form of an implementation strategy.

4.12.c.i Black and Oatka Creek Watershed Management Plans

The Black and Oatka Creeks are major tributaries that combined drain approximately 420 square miles in parts of five counties to the Genesee River. Both watersheds are organized with watershed committees, both have completed State of the Basin reports and because of their proximity to each other both watershed committees, along with state, county, organizational and municipal representatives and G/FLRPC are attempting to work together to efficiently and effectively produce watershed management plans and the resulting implementation.

4.12.d Other Water Resource Initiatives

4.12.d.i Keuka Lake Looking Ahead – An Intermunicipal Land Use Action Plan

The assessment of local laws in the Keuka Lake watershed was initiated in the summer of 2007 as “Component I” of the Keuka Lake Looking Ahead project. This analysis utilizes an assessment form to summarize the body of local laws within each municipality. The forms are intended to facilitate both the internal evaluation of a municipality’s local law framework as well as the external comparison of local laws between neighboring municipalities within the watershed.

The analysis aided participants in the Land Use Leadership Alliance Training Program that took place in January and February 2008 and again in October 2008, as they learned about methods to address priority land use issues within the Keuka Lake watershed. The culmination of the Keuka Lake Looking Ahead project was reached with the completion of “Component III,” the *Keuka Lake Watershed Land Use Planning Guide: An Intermunicipal Action Strategy*.

The Guide was developed in order to provide the eight project municipalities within the Keuka Lake watershed with an objective and up-to-date land use planning resource. The report documents and profiles current land use conditions within the study area and offers a series of specific recommendations for the future use and development of the Keuka Lake watershed’s land. It includes many of the same elements as a typical municipal comprehensive plan contains, including narrative descriptions and explanations of its recommended land use policies. These recommendations are intended to assist local municipalities with the planning process and provide guidance on complex and sometimes divisive land use planning issues.

4.12.d.ii Regional Blueway Analysis

Blueways are small boat and paddling routes that combine recreation and environmental awareness and allow users to travel to designated stops along the way for rest, overnight stays and enjoyment of land-based attractions in the vicinity.

The *Regional Blueway Analysis* project will seek to identify, describe and rank riparian corridors, lakes and canals throughout the nine-county Genesee-Finger Lakes Region based upon their suitability for blueway use and official State designation. This project will result in a "ready-to-use" plan that will enable municipalities and local leaders in the region to explore, utilize, and unlock the potential of their local water resources.

To date, local stakeholder focus meetings have been held throughout the G-FL Region in order to assess local conditions and discuss opportunities with regard to developing regional paddling routes. A draft report is scheduled for completion in January 2010; the final report is anticipated to be completed in June 2010 after receiving public review.

Chapter 5 - Development Actions, Efforts and Priorities

The following section itemizes the proposed actions, efforts and priorities of the Economic Development District. The plan of action, 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.

Regional partnerships between public agencies and non-profit, academic and private sector organizations as well as the existing regional cooperative efforts contribute to the implementation of the CEDS.

5.1 Genesee-Finger Lakes Region

A proper telecommunications infrastructure is crucial for the G-FL region to aggressively compete in the rapidly changing global economy. In an 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, Wyoming and Yates 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 and Wayne 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.

A telecommunications infrastructure study aligns with many of the elements of Finger Lakes Wired, 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. Finger Lakes Wired heavily endorses the development of a regional telecommunications infrastructure plan.

Another project that the Finger Lakes Wired Operations Team strongly endorsed in 2008 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.

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	2008-2010
GFL-2	Regional Economic Development Analysis and Benchmarking Study	Federal, State, Local, etc.	\$250,000	2008-2010

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 2.1 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 fourth straight year, in terms of economic development projects, as ranked by Site Selection Magazine. This is the fifth 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 “Industry Focused” business parks currently under development including: Upstate Med & Tech Park, a life sciences park located in close proximity to Genesee Community College and will house a commercialization center for emerging life science businesses, the Genesee Valley Agri-Business Park, a one of a kind, 200+ acre park dedicated to food processing; as well as the Buffalo East Technology Park which is ideal for high tech, IT or Green Technology application. Efforts also continue to develop a large scale (1,300 acre) advanced manufacturing park located in the Town of Alabama, located on State Route 77, just five miles north of Thruway Exit 48A called STAMP (Science and Technology Advanced Manufacturing Park) all located in 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 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. Genesee County, the Batavia Micropolitan area, has experienced record breaking economic development growth in terms of projects, capital investment and job creation commitments; completing its five year growth oriented strategic plan and beating expectations by as much as 277%. This plan continues to set the benchmarks for the GCEDC since constructing a new plan under challenging economic times seems unreasonable.

Genesee County’s community economic development vision and mission focuses on enhanced capital investment which provides funding 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.

During 2008, the GCEDC achieved the following:

1. Enabled \$60 million in capital investment county-wide (215% of plan)
2. Participated in 43 economic development projects supporting the expansion and retention of the existing business base and new business attractions (172% of plan)
3. Job creation of 232 jobs (92% of plan)
4. Continued active economic development and marketing programs
 - Empire Zone consulting and implementation
 - Business retention and expansion programs
 - Business attraction programs
5. Supported agricultural industry – By forming a public private partnership and securing financing and for operation of and infrastructure for a 200+ acre park dedicated to Agribusiness and Food Production
6. Supported emerging industry clusters – A new economic base for the community
 - Medical Technology companies including Medical Manufacturing, Pharmaceutical Manufacturing and Bio-Technology enterprises via Upstate Med & Tech Park.
 - High Technology Enterprises via WNY STAMP and Buffalo East Technology Park.
7. Developed four new corporate/industrial parks to potentially include:
 - Upstate Med & Tech Park
 - Genesee Valley Agribusiness Park
 - Buffalo East Technology Park

- WNY STAMP
- 8. Developed regional inter-municipal partnerships: “Opportunity Zones”
 - Leveraged success of regional water deployment initiative
- 9. Expanded economic development support to small business/retail/start-ups/incubators
- 10. Enhanced workforce development offerings to business community by securing grant dollars dedicated to industry specific workforce development efforts

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	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
G-1	Buffalo East Technology Park	GCEDC/ GGLDC	\$22.2 Million Federal, State, Local	2,000
G-2	Develop shovel-ready Genesee Valley Agribusiness Park	GCEDC/ GGLDC	\$10 Million Federal, State, Local, Private	1,200
G-3	The Upstate Med-Tech Project: Develop a Regional Med-Tech Business Park and Commercialization Center	GCEDC/ GGLDC	Park: \$1.5-2.0M, Commercialization Center: \$7-\$8 Million Federal, State, Local	400
G-4	Develop Mega-Site Industrial Park supporting large scale Advanced Manufacturing	GCEDC/ GGLDC	\$100-\$125 Million Federal, State, Local	9,300
G-5	Re-development of the Batavia/Downtown Corridor	GCEDC/ GGLDC	\$5.0+ Million Federal, State, Local	TBD
G-6	Develop Lower Cost of Power Solution(s): Cogeneration, Alternative Energy to lower power costs businesses	GCEDC/ GGLDC	TBD Federal, State, Local	TBD
G-7	Assist Community Development via Main Street Projects, Housing issues and Quality of Life	GCEDC/ GGLDC	TBD Federal, State, Local	TBD

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 aligned with Monroe County.

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. Additionally, two privately owned sites, one in Geneseo (the Valley at Geneseo) and one in Avon (the Livingston Industrial Complex), have also been designated as Build Now - NY “shovel ready” sites. Business attraction efforts to these and other privately held sites throughout Livingston County continue to reach regional and national site selectors. Through these marketing efforts, Barilla America NY selected Livingston County as the location of their second United States manufacturing operation. Barilla opened a new 310,000 square foot manufacturing and warehousing operation in Avon in 2007 and has increased its production to full facility capacity in 2009. The attraction of Barilla America further enhances the county’s strategic food and beverage industry cluster that includes Kraft, ADM, Sweeteners Plus and Seneca Foods.

Livingston County has partnered with Greater Rochester Enterprise (GRE), a public/private economic development partnership, established to professionally market the G-FL region for business location and growth. GRE participates in many national trade shows and hosts site selector events in the region. Livingston County is able to stretch its marketing dollars by partnering with GRE.

The Livingston County Development Group, the marketing arm of the County Economic Development Office, Industrial Development Agency and Empire Zone recently completed a major overhaul of its website. Descriptions and photos of available sites and buildings are presented on the Livingston County Development Group web site for potential tenants/buyers at www.build-here.com/sites.htm.

Agriculture and related agribusiness 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 completed its Agriculture and Farmland Protection Plan in 2006 that identifies the need to strengthen agricultural-based economic development.

Land-O’Lakes Inc. completed a deal with the Caledonia Commodity Resource Corporation (CRC) to take over the multi-modal feed and fertilizer transload facility located in Caledonia. The facility exemplifies the changing face of agribusiness through Livingston County as the food processing and distribution industry has clustered in the northern portion of the county where infrastructure exists to meet its unique requirements.

Perdue, the Maryland-based family-owned company most know for its poultry products, has established its first location in New York State in the Town of Livonia with the purchase of the former Lakeville Transfer/PACMA facility. The company plans an expansion of the feed and grain transfer and storage facility.

Kraft, Livingston County's second largest private sector employer completed a \$4.7 million expansion of its *Lunchables* product line in 2009 creating 50 new jobs.

The Livonia Gateway Project, a proposed road from NYS Route 15 to Bronson Hill Road in the Town of Livonia, is on hold pending the release of state funding. The road will address increased truck traffic generated by the Perdue facility and existing businesses in the area. The County Office of Economic Development is working with the Town of Livonia and the landowners group to facilitate the construction of the road.

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 works with the County Chamber of Commerce, SUNY Geneseo Foundation, and Small Business Development Center to assist new and expanding small businesses. The County has 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 Avon, Caledonia, Dansville, Lima, Livonia, Mt. Morris and Nunda. A New York "Main Street" grant was awarded to the Village of Mt. Morris in 2009 to restore downtown buildings through 2011. The grant award provides a traditional program of classroom instruction and business plan development and includes funds to re-capitalize the Microenterprise Revolving Loan Fund. The Microenterprise Assistance and Downtown Revitalization Programs are operated by the Alliance for Business Growth and are a continued priority for Livingston County. In 2009 the Alliance for Business Growth transitioned from the SUNY-Geneseo Foundation to the Livingston County Development Group.

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. The establishment of this facility continues to be a top priority for Livingston County.

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. The 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, Dansville Properties purchased the facility that now houses several small manufacturing operations including LMC Power Systems, and American Motive Power that are anticipated to create a total of 300 new jobs. MISCOR recently completed a stock purchase of American Motive Power and will expand the company's operations. To do so, an approximate \$2.5 million upgrade of the thirteen-mile rail line from Hampton's Corners to Dansville, which services the Dansville Properties facility, is needed.

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. The county has six contiguous sites that are in the Empire Zone and to date seven businesses have been certified.

Continuing education and training within the county is offered through Genesee Valley BOCES, which provides a wide range of adult educational services from its Mt. Morris campus and Genesee Community College, which has campus center locations in Dansville and Lakeville.

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 Genesee and the Livingston Health Services Ambulatory Care Center. The construction, by Livingston County, of a new 266-bed skilled nursing facility in Mt. Morris has been successful with the center offering a transitional care unit, adult day health care, hospice, memory care and bariatric care units.

Livingston County also undertook the renovation of the central portion of the facility for an outpatient Kidney Dialysis Center, serving those county residents in need of dialysis services and operated in conjunction with Noyes Memorial Hospital.

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. One option currently under consideration is partnering with Ontario County to pursue telecommunications/broadband technology regionally.

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

Table 25 - Livingston County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
L-1	Rebuild and Repair of Rail line to Dansville Properties	Livingston County IDA/G&W RR	\$2.5 million TBD	100
L-2	Small Business Incubator	Livingston County LDC	TBD EDA, State, Federal	50
L-3	Completion of Infrastructure at Crossroads Commerce Park, Avon	Livingston County IDA	\$1 million EDA, DOT, County	100
L-4	Multi-Tenant building at Dansville Industrial Park	Livingston County IDA	\$2 million EDA, New York State, County, Private	50
L-5	Broadband Technology	Livingston County ITS	\$1 million ARRA	TBD

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, biotechnology, and alternative energy and fuel cells as well as business information services, food and beverage manufacturing, and telecommunications.

Small business growth and expansion is recognized as the major source of new job creation and programs are made available to assist these firms. Monroe County's Economic Development Department and Industrial Development Agency has incentive programs to reward small and medium sized businesses for investing in equipment and creating jobs within the county. Incentives range from interest rate reductions to rebates on equipment purchases and property tax abatement.

Monroe County's Empire Zone has been another tool to help attract new companies from outside of New York to the County. The County has five contiguous sites that are in the Empire Zone: Rochester Tech Park in Gates, Medley Centre in Irondequoit, KPS/Kodak

Park in Greece, the former Kleen Brite site in Brockport, and the Lennox Tech Center in Henrietta.

Future industrial development is expected in the western and southern portions of Monroe County. Prime industrial space is located in the Rochester Technology Park, the Jetview Business Park, Rochester International Commerce Center and the Thruway Industrial Park.

Monroe County continues its partnership and marketing agreement with Greater Rochester Enterprise (GRE), a public/private partnership established to professionally market the Rochester Metropolitan Area and surrounding region to business groups. The primary focus of 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 duplicating the on-going efforts of state, regional and local partners.

Supporting Activities and Infrastructure

Monroe County's institutes of higher education have continued to commit resources to expand research, technology transfer and workforce development and to connect students from all over the world to opportunities in the region. The Rochester Institute of Technology continues investment in sustainable systems and green research through the Center for Integrated Manufacturing. The University of Rochester has increased investment into the University's medical research arm bringing in additional faculty and researchers. These investments and numerous others that are in the planning or development stages are key components for the region's future economic successes.

Monroe County continues investment in the sewer, water and transportation infrastructure within the County. Infrastructure investments are developed based on established priorities and needs and are implemented through the County's Capital Improvement Program in coordination with the City of Rochester and local towns and villages. The proposed capital improvement program for 2010 will invest in highways, bridges and traffic engineering, improvements at the Greater Rochester International Airport and water infrastructure projects, amongst others. These investments will help address the aging infrastructure within the County and provide a foundation for future development to occur.

The implementation of the Monroe County Agricultural and Farmland Protection Plan continues and is viewed as a means to insure the continued vitality of agriculture in a predominantly metropolitan county. The economic impact of agriculture within Monroe County is significant with a total production value in 2002 of over \$53 million. The Farmland Protection Plan focuses on maintaining and strengthening agriculture as an industry and tracking the conversion of farmland to other uses and related development pressures.

Renewable Energy for Economic Development

Monroe County is continuing to pursue the Mill Seat Landfill Bioreactor project, a project that holds great promise for both creating renewable energy resources and spurring economic development and job creation in the County. The details of this project are outlined below.

Mill Street Landfill Bioreactor

In 2004, County Executive Maggie Brooks formed a County of Monroe Energy Task Force. The goal of the Task Force is to explore new opportunities to enhance the County's use of renewable forms of energy that will benefit both the County and the environment and reduce the County's dependence on non-renewable fuel sources such as coal, oil, natural gas and nuclear power. Coming out of this Task Force is the Mill Seat Landfill Bioreactor project, which will take advantage of the available methane gas being produced at the Mill Seat Landfill.

It was determined that there was enough methane gas being produced to produce 4800 kilo-watts (kW) of power. In 2006, the County of Monroe began construction on an eight engine landfill gas fueled power plant. Initially, 6-800 kW gensets were installed and the plant was commissioned in August of 2007. Subsequent gas modeling studies were conducted in 2008, and in 2009 two (2) additional 800 kW gensets were installed bringing the total output of the original plant to 6400 kW.

In the first quarter of 2009, a landfill gas modeling study showed that there is now enough landfill gas to supply three (3) additional gensets. The model also predicts that in 2012 there will be enough landfill gas for five (5) more gensets, for a total of eight new engines. Having that information, the County of Monroe has begun the process of selecting a project team to install a new eight engine power plant adjacent to the existing power plant at the Mill Seat Landfill. Initially, the new power plant will have three (3) engines installed. However, the overall plant will be designed and built to accommodate 8-800 kW gensets. The estimated cost of the new Power Plant and three gensets is \$7,500,000.

Monroe County will use this inexpensive electricity, as well as free thermal energy associated with the project, to entice companies to locate to the industrial park. This industrial park has the necessary utility infrastructure in place to support business development, including access to a county-sponsored fiber optic network. With the process to capture methane in place, the site can provide all of the necessary utilities at below market rates making the site very attractive for development by high electric users in the manufacturing sector.

Monroe County's priority project is listed in Table 26 on the following page.

Table 26 - Monroe County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
M-1	Mill Seat Landfill Bioreactor	Monroe County DES	TBD Federal, State, Monroe County	75

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.

The City of Rochester also maintains a brownfield revolving loan fund and operates a successful brownfield development program. The development program utilizes funding from the Environmental Protection Agency and allows investors to pursue development of potential brownfield sites without financial risks. Potential investors and property owners work with the City to complete an environmental site assessment report for a potential site, which outlines the level of contamination and the steps needed for remediation. Investors can then choose to move forward with the purchase of property or walk away without penalty. The program has helped the City complete redevelopment of over 25 projects during the eight years it has been in operation helping to add properties to the tax rolls and bring jobs and investment into the City.

Midtown Plaza

In partnership with the State of New York, the City of Rochester is moving forward with the revitalization of the Midtown Plaza properties in the heart of the City's central business district. Midtown Plaza consists of approximately 1.5 million square feet of vacant, office and retail buildings covering 8.6 acres. Through the condemnation process, the City acquired the properties on May 28, 2008. The project involves the demolition of most of the Midtown buildings, inclusion of new streets and open space and creation of six or seven development parcels. In 2009, the City completed the State Environmental Quality Review Act process for the redevelopment plan.

The \$34.1 million asbestos remediation contract was awarded to Cambria Contracting Inc., in May 2009 and the \$1.69 million air monitoring contract was awarded to Paradigm Environmental Services Inc. Asbestos removal will be underway in late August 2009. Demolition of the remediated buildings will commence in late 2009/early 2010. The remediation and demolition phase is being funded by the State of New York at a cost of \$55 million. The City is seeking assistance through various federal programs to assist with infrastructure costs to construct streets, utilities and open space.

Redevelopment of the site will include a new world headquarters for PAETEC Holdings Corp. The City is also evaluating three proposals for purchase and adaptive reuse of the 17-Story Midtown Tower to a mix of uses including residential, retail, and commercial. If a proposal is not selected, the Tower will also be demolished.

Port of Rochester Redevelopment

The City of Rochester is advancing several plans for revitalization of its Port. The Port location provides a unique private investment opportunity based on its proximity to the major waterways of Lake Ontario and the Genesee River. The City's Local Waterfront Revitalization Plan (LWRP) for the Port area is being amended to incorporate the elements of its most recent master planning process and the recently completed marina feasibility study. This LWRP amendment will include economic development goals and guidelines for the Port/Charlotte community.

Based on the LWRP, 2006 Port Master Plan, and the City's 2008 Marina development feasibility study the City is beginning the redevelopment of the 40 acre Port site through the combination of a new 120 slip marina basin development, public infrastructure improvements, commercial and residential development, and public waterfront access. Costs to construct the planned 6.8 acre public marina are estimated at \$8.5 million. Additional infrastructure costs including the relocation of utilities, a new street and right of way construction including a new central connecting section of River Street, and a new public promenade are projected to total approximately \$15 million. When the costs of new buildings and relocation of some existing public facilities are included the total public funding required for improvements to the 40 acre site is estimated at \$32 million. The City has initiated preliminary design and regulatory permitting for the project. The first phase of the marina construction project including all infrastructure work is expected to begin in 2010-2011. Approximately \$2.7 million in NYS multi-modal transportation, NYS Environmental Protection Fund (Department of State), and federal Intelligent Transportation System funding has been secured for the Port redevelopment.

Projected private investment over a three to six year period beginning in 2011 is estimated at \$89 million to \$133 million. Private development of 280-430 new residential units and 44,000 square feet of new street level commercial and retail space is planned. Approximately 625 construction jobs are expected from the public construction projects and another 1,875 jobs from the private sector residential and commercial development. Upon completion the project is expected to create over 300 direct and indirect permanent jobs.

In 2008 the Mayor signed a memorandum of understanding with the State College at Brockport and the SUNY Research Foundation to establish a Lake Ontario Natural Resource Center in a portion of the Port Terminal Building. Preliminary cost estimates for the Center range from \$2 million for the first phase to \$12 million for full build out. The City has also significantly increased Great Lakes cruise ships visitation to the Port of Rochester and use of the Ports deep draft Terminal docks for 2009.

Photech Site

Located at 1000 Driving Park Avenue, 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 1990's, and the City acquired the site through tax foreclosure in 1997. The documented liabilities and potentially significant environmental remediation costs have discouraged redevelopment of the property. Total estimated demolition and cleanup costs are \$4.5 to \$5 million. The City's \$3.4 million environmental cleanup grant was approved in 2007 by the New York State Department of Environmental Conservation. In addition, during 2007, the City was approved for a \$200,000 USEPA brownfield cleanup grant for the Photech site. The City has selected a consultant for the cleanup, and anticipates cleanup to begin in the summer of 2009. The cleanup project is scheduled to take approximately 16 months to complete.

It is anticipated that the former Photech site will be redeveloped as an industrial park, which will subsequently stimulate private sector investment and economic development. Redevelopment as an industrial park will require City expenditures for design, grading, utilities and public road improvements, and related infrastructure. Estimated costs for the potential new investment in the redevelopment of the Photech site range from \$10 to \$20 million. Assuming the new buildings will occupy between nine and ten acres it is anticipated that the Photech Site will result in the creation of 180 to 200 new jobs. Environmental cleanup is expected to be completed by late 2011.

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 1860's through the 1930's, and contained up to 135 storage tanks and process vessels and processed up to 4 million gallons of crude oil in the 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 2007 the city's \$200,000 USEPA brownfield assessment grant for the project area was approved and the contract has been executed. The grant will be used to characterize, investigate and conduct planning and community involvement related to brownfield sites contaminated by hazardous substances, pollutants or contaminants. In March 2008 the City's Brownfield Opportunity Area planning grant for the former refinery site was approved by New York State Department of State (NYSDOS), and in March 2009 the

City and NYSDOS finalized the BOA project work plan. This \$212,000 grant will fund 90% of the costs of land use studies and the development of redevelopment plans for the former refinery site and the surrounding area. Exxon Mobil, the successor company to the original refinery company, has signed a stipulation agreement with the New York Department of Environmental Conservation and has completed a site investigation of a portion of the former landfill. Significant planning, design, and infrastructure investment will likely be needed to redevelop this large riverfront site. The City expects it will need to make investments in strategic properties, improvements to the recreational access to the Genesee River waterfront and associated public trails, and complete design and construction of new roadways and utilities in order to maximize the economic and community redevelopment potential of the site.

88 Elm Street Building

This 80,000 square foot building is currently vacant and secured from entry due to asbestos and environmental remediation issues. A complete environmental cleanup estimated at \$1,000,000 and renovation estimated at \$8,000,000 is required to bring the property up to standard. The amended asbestos survey and abatements specifications have been completed. These specifications will be put into contract format and sent to purchasing for public bid in late 2009/early 2010. Remediation will commence in 2010.

666 Driving Park Avenue/DuPont site

This is an approximately 10-acre site located on Driving Park Avenue about one half mile east of Mt. Read Boulevard. The site is owned by DuPont, and was a former DuPont photographic film manufacturing site. All of the aboveground buildings and structures have been removed, and preliminary subsurface investigations performed by DuPont have documented several areas of contamination that need further investigation and/or cleanup. At the request of the City, DuPont entered into the New York State Department of Environmental Conservation's Brownfield Cleanup Program, and is in the process of completing a remedial investigation. 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 time frame for redevelopment is 24-36 months. The cost of remediation is not known at this time.

Emerson Street Landfill Area – McCrackenville/Emerson Street

This is an area on the former Emerson Street Landfill located on the north side of Emerson Street. The New York State Department of Environmental Conservation (NYSDEC) has issued a Consent Order to the City which will require the City to evaluate potential vapor intrusion associated with the former landfill. The Consent Order also allows the city to complete other related investigation or cleanup measures. Approximately 22 acres of the former landfill remain undeveloped. Portions of the undeveloped area may be appropriate for development, however utility and street roadway infrastructure is needed to support any new facilities. The City is negotiating a consent order with NYSDEC to investigate and remediate or mitigate remaining environmental issues at the site including landfill gases, groundwater contamination and landfill capping. Site environmental and geotechnical considerations may limit

commercial or industrial development to the northern and southern portions of the site which comprise 6 to 10 acres. Investigation and remedial activities will take approximately 2 to 3 years to complete. The redevelopment site plan and subdivision process could begin in approximately 18 to 24 months.

The City of Rochester's priority projects are listed in Table 27.

Table 27 - City of Rochester Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
R-1	Midtown Plaza	City of Rochester	\$141 Million NYS and other	TBD
R-2	PORT of Rochester	City of Rochester	\$146 Million TBD	TBD
R-3	Photech Site	City of Rochester	\$10-\$20 million EDA, USEPA, NYSDEC	TBD
R-4	Vacuum Oil Site	City of Rochester	\$10-\$20 million EDA, USEPA, NYSDEC	TBD
R-5	88 Elm Street Building	City of Rochester	\$9 million TBD	TBD
R-6	666 Driving Park/DuPont site	City of Rochester	TBD TBD	TBD
R-7	Emerson Street landfill area	City of Rochester	TBD TBD	TBD

5.6 Ontario County

In 2004, the Ontario County Office of Economic Development/Industrial Development Agency (OED/IDA) updated strategic plan was submitted to and accepted by the Board of Supervisors. This 2004 update focused on the development of 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 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 including
 - sewer & water
 - roads
 - telecommunications
 - airport access

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

- Ag-Tech/Food Technology/Food and Beverage Production
- Photonics/Infotonics/Micro Electro Mechanical Systems
- Existing Mature Industries & Advanced Manufacturing
- High-Tech Producer Services
- Select Signature Quality of Life Niches in Retail/Hospitality/Tourism
- Aviation-Related
- Web-Based
- Green-Industries (Geo-thermal, alternative energy, etc.)
- Solutions based companies

Strategy recommendations for Ontario County are:

- Continue strengthening the Technology Commercialization Path
- Workforce Development/Talent Retention & Attraction
- Retain/Expand Mature Industries
- Promote Selected Types of Retail/Hospitality/Tourism Development
- Create Infrastructure to Support Technology-led Economic Development
- Initiate a Community Prosperity Preparedness Program
- Address the lack of high quality shovel ready sites

OED/IDA has advanced their strategic plan in the areas of technology commercialization and talent attraction through the Cornell Agriculture and Food Technology Park and Infotonics Technology Center. Both of which have provided an avenue for small, high technology businesses to access the resources they need to grow.

Cornell Agriculture and Food Technology Park

One of the OED/IDA's more recent projects was the Cornell Agriculture and Food Technology Park in the City of Geneva. The over 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 "flex-tech" incubator building, termed the Tech Farm, offers offices, wet labs and pilot production facilities. Opened in late 2005, the Tech Farm is now home to eleven companies in a variety of enterprises. With the center currently at 70% capacity and future growth limited by a lack of available square footage and service space (loading docks, warehousing & refrigerated storage), a second building, the Finger Lakes Food Innovation Center has been proposed to provide space for larger pilot operations, distribution functions and to allow the Tech Farm to be utilized, as intended, for the development of research grade laboratories. The construction of the Food Innovation building would allow for continued build out at the Technology Park, creating opportunities for both research laboratory applications and commercialization pilot plants. It would also fulfill a need for the type of service operations not available within the first center, creating further incentives for future Park development from outside investors since vital distribution functions would be available within the Park. Ultimately, the Finger Lakes Food Innovation Center could be responsible for the creation of hundreds of new jobs along with sizable investments within the region.

The Cornell Agriculture and Food Technology Park 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 help train and educate local employees for careers in occupations generated by the tech park.

The following development initiatives have been targeted by the Cornell Agriculture and Food Technology Park:

Increase the harvest of potential commercial applications found at the Agriculture Experiment Station-

Through US Department of Labor WIRED funding, the Technology Park contracted with a technical expert in plant physiology, who interviewed researchers to identify the research with commercial potential and to assist in preparing to pursue seed financing for proof of concept. After conducting thirty interviews several prospects were identified for funding, allowing them to further develop their product.

Create additional leasable square footage-

The development of the Finger Lakes Food Innovation Center building will provide additional space that can be utilized to house pilot production facilities, which are currently operating in the Tech Farm. Transferring these facilities to the Food Innovation

Center will allow the Tech Farm to serve as commercial lab space for existing corporations. Adding this leasable space would therefore open up room for both pilot production as well as lab space. Critical to this goal is the completion of the USDA grape genetics lab, which would provide much needed cash flow for the potential expansion.

Extend water and sewer-

Extending water and sewer infrastructure beyond the Tech Farm to the entire complex will enable the Park to respond much more rapidly to any requests for land leases or “build-to-suite” space.

Infotonics Technology Center

The Infotonics Technology Center (ITC), a 501(c)(3) corporation, is a collaborative effort with numerous universities and colleges 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 micro electric mechanical microsystems prototype product facility.

A pending initiative of ITC is Infotonics Commercialization Center (ICC). ICC is being developed 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 Fiber Optic Ring

Telecommunications is such an integral part of Ontario County’s strategic approach it has been likened to the economic impact of other paradigm-shifting infrastructure such as the New York State Thruway and the Erie Canal. A study entitled “Ontario County Open Access Network Initiative” assessed the existing telecommunications infrastructure as well as identified opportunities for further development and expansion. The study found

that telecommunications in the region is segmented and that there is a need for a high speed network to connect underserved areas of the County.

The Finger Lakes Regional Fiber Infrastructure Project was developed from the findings of the study. This project's mission was to identify the means of building a regional open access fiber optic ring to connect education, healthcare, public safety, and government. An outgrowth of this project has been the creation of the Finger Lakes Regional Telecommunications Development Corp. This LDC has successfully accessed the funding necessary to construct the fiber optic ring. As of August 2009, approximately one half of the ring has been completed and contracts with vendors to supply service have been executed. Construction is expected to be completed in 2010.

The establishment of the fiber optic ring will also help attract new workers to the region who can utilize the available technology to telecommute to jobs anywhere in the world. Establishing a core of these knowledge workers will also position the County well in the attraction of technology companies looking for an educated workforce.

The fiber optic ring 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. Maintaining and expanding all types of infrastructure, ranging from traditional roads to venture capital, will position Ontario County to take advantage of the high growth industries of tomorrow.

Ontario County's priority projects are listed in Table 28.

Table 28 - Ontario County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
ON-1	Cornell Agriculture and Food Technology Park Finger Lakes Food Innovation Center	Ontario County OED/IDA	\$7,000,000 New York State, EDA	TBD
ON-2	Infotonics Commercialization Center	Ontario County OED/IDA	\$6,400,000 New York State, Local, Private, EDA (Pending)	TBD

5.7 Orleans County

Orleans County encompasses 396 square miles with a population of about 42,000 and is located on the southern shore of Lake Ontario between the Cities of Rochester and Buffalo. Historically dominated by farming and agribusiness, the local economy today has a growing government service sector and a sizable manufacturing component.

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 and connect with I-190 in the western edge of Niagara County.

Orleans County is also home to the first ethanol plant in the Northeast, operated by Western New York Energy LLC. The plant has been in operation since November 2007, providing a direct benefit to the region in terms of job creation and investment. It also provides local farmers with an additional market for their corn.

Target Development Areas

Orleans County has identified seven target development areas that correspond with its approved NYS 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 1 – Medina West End Industrial Complex - 213 acres

The 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. With access to a large employee base, extensive existing infrastructure, and a mixture of buildings for reuse and open land for new builds the continued development and redevelopment of this area is a logical and strategic fit due to its many strengths and resources.

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 areas, 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 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 contains several building complexes including the 155,000 square foot Washington Mutual 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 to 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 also 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 area is owned and operated by St. Gobain, a textile manufacturer. This area is four miles from Route 104 and has easy access to the New York State Thruway. It is located 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 who have 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 development area represents a portion of a major north/south transportation corridor connecting the New York State 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 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 New York State Thruway, properly 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) works with many other government agencies 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 region 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)

OEDA/IDA has additionally completed the following economic development projects:

- Upgrade to Holley Business Park infrastructure
 - \$600,000 public investment from the Town of Holley
 - 50 jobs estimated to be created
- Completed the Virtual Building project at Medina Park
 - \$50,000 in private sector investment went into the project
 - 50 jobs estimated to be created

Orleans County's priority projects are listed in Table 29 on the following page.

Table 29 - Orleans County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
OR-1	Albion Business Park Development	County of Orleans IDA	\$500,000 EDA, NYS, Orleans County	200
OR-2	Orleans Fiber Optic Pipe	County of Orleans IDA	\$500,000 EDA, Orleans County, Private	TBD
OR-3	Hoffman Road Shovel Ready	County of Orleans IDA	\$1,025,000 EDA, Orleans County, Private	TBD
OR-4	Medina Park Spec Building	County of Orleans IDA	\$3,000,000 EDA, Orleans County, Private	TBD
OR-5	Medina Park Shovel Ready	County of Orleans IDA	\$690,000 EDA, Orleans County, Private	TBD
OR-6	Holley Park-Electrical Supply	County of Orleans IDA	\$6,625,000 EDA, Orleans County, Private	TBD

5.8 Seneca County

Seneca Army Depot

A focal point of the Seneca County IDA's efforts over the past two decades 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 directly at the prison and an additional 190 indirectly). Additional investments at the south end of the depot have been made by The Advantage Group, Seneca Bio-Energy and Total Quality Hay Processing. Development at the north end of the depot includes a Hillside residential-educational facility for youth in crisis, which has created 350 jobs. Also, fiber optic technology and data storage is provided on the northern end of the depot by Finger Lakes Technology Group. Some 180 units of military housing have been sold by the Seneca County IDA and are being managed by the private sector with additional upscale housing units being developed along Seneca Lake.

New York State Police training facilities and a new Seneca County Fire Training Tower have been developed at the southwestern end of the Depot with grants from the State of New York and EDA. A 124 bed county correctional facility has been completed in an area adjacent to the PID/Warehouse area. Portions of the warehousing facilities are being leased from the IDA to Seneca Depot LLC, and are being subleased for storage and

refurbishing of restaurant equipment. The IDA has taken title to the entire area, except for the acreage under environmental remediation, and will convey it to Seneca Depot LLC and several other public entities.

Infrastructure problems and deferred maintenance by the U.S. Department of the Army is a significant problem limiting the IDA and Seneca Depot LLC's ability to establish economic reuse of the Depot PID/Warehouse property. Electric power is needed in the roads, sewer system, water system and buildings to allow for their successful transition in support of private development activity.

Environmental remediation is continuing and remains to be completed on approximately 900 acres (of 10,500) of the Depot. There have been proposals to use part of 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 wildlife at the base, including the herd of white deer, until environmental remediation has been completed, now estimated to be the year 2015.

The IDA and the Seneca County Economic Development Corporation (EDC) are in the process of updating the original Base Reuse Plan. The plan maintains conservation and recreational uses on the site and dedicates a portion of the facility to the promotion of green energy projects. Also included is a development reserve area intended to accommodate large-scale users. The plan will drive a targeted marketing effort, develop a process to solicit proposals for reuse, and make determinations regarding ultimate disposition of the property. This work is expected to continue over the next four years, with the implementation of the plan driven by the private sector and the market.

The IDA has 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 in discussions with a number of interested training organizations including Fort Drum and the Navy Warfare Office.

Other Seneca County Development Activities

Seneca County continues to rebuild its economy after the closings and losses of jobs at the Seneca Army Depot and Willard Psychiatric Center. Rebuilding will be addressed 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, which includes the Deer Run Corporate Park in the Village of Seneca Falls. 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 and a major PETRO Travel Center has been opened opposite Exit 41. The PETRO project has created over 150 new jobs, is generating over \$1.5 million in new sales tax annually and has already expanded its operations beyond

what was initially 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 the development of a renewable energy industrial park that will utilize low cost energy being produced by the processing of methane from the landfill. Currently 18 MW are being delivered to the grid by the Seneca Energy Company and construction is underway on a facility housing a number of electric generators that will be fueled by methane.

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. The Outlet Center 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 expects 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.

Agriculture and Tourism

Agriculture and associated agribusiness continue to expand, primarily in the southern portion of Seneca County and agribusiness continues to be a focus of the IDA. Top Quality Hay Processors began operations in 2009 utilizing warehouse space at the Seneca Army Depot. Top Quality Hay Processors contracts with local farmers to take hay from the field and dry it with their equipment indoors, reducing drying time and improving the quality of the hay for sale. The company will not only benefit local farmers, but also create approximately 20 jobs within the County.

The tourism industry within the County is noted for the increasing number of wineries, restaurants and bed and breakfasts located along the shores of Seneca and Cayuga Lakes. Historical and cultural tourism sites are also prevalent and include the National Women's Hall of Fame and the Montezuma National Wildlife Refuge. The Seneca County Chamber of Commerce serves as the local tourism promotion agency marketing the area's attractions and is continuously working to enhance the local tourism industry. The Seneca Knit Development Corporation is rehabilitating the former Seneca Knit Building into a new home for the National Women's Hall of Fame that will include an adjacent hotel abutting the Seneca-Cayuga Canal. The Chamber of Commerce is also in early

discussions about locating the proposed Finger Lakes Cultural and History Museum in Seneca County.

Small Business

Small businesses and start-ups account for a significant portion of the growth in the County's overall economy. To assist in the development of these companies the Seneca County Department of Planning and Community Development offers 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.

Airport and Other Facilities

Infrastructure investment at the Finger Lakes Regional Airport, which is owned and operated by Seneca County, continues utilizing federal, state and county funds. The investment will help increase the use of the airport, which already accommodates corporate aircraft- by business travelers and tourists. The airport runway has recently been expanded to 4,200 feet and a number of other improvements are underway including new hangars and aids to navigation. The County is also looking to update the Airport Master Plan and Requests for Qualifications have been sent out and a consultant has been selected.

Master Planning

Seneca County has initiated an update to the County's Comprehensive Plan. While the current plan has proved beneficial, 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 considerable input from community leaders and the citizenry at large.

Seneca County priority projects are listed in Table 30 on the following page.

Table 30 - Seneca County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
S-1	Electrical Upgrade – Seneca Army Depot	TBD	\$8.0 Million EDA	TBD
S-2	Infrastructure Improvements at the Seneca Army Depot – water, sewer, roads, rail and drainage	TBD	\$12 Million EDA, NYS	TBD
S-3	Demolition of derelict and unneeded buildings and facilities at the Seneca Army Depot	TBD	\$5.5 Million EDA, NYS	TBD
S-4	Route 318 Sewer Expansion/Upgrades to Connections	TBD	\$4.5 Million EDA, NYS, Local	TBD
S-5	Seneca County Master Plan	TBD	\$140,000 EDA, Seneca County	TBD

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 as well as food production facilities and a host of other types of manufacturing businesses 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 expand over the next three to seven years. Agriculture and the related agribusiness sector form another key component of economic activity within the County. A number of industries are involved in bio technology, particularly with regards to animal vaccines, foods and training. It is anticipated that these industries, along with alternative energy industries, will grow over the next five years, with the agricultural industry strengthening in food production and potentially 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 brownfield cleanup program has been created with the initial project completed in the Town of Sodus. This program will assist in expanding the amount of developable land in the county while alleviating pressure to develop open space and agricultural properties.

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 IDA has worked to design 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 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 affordable energy.

In the fall of 2006 the Wayne County IDA obtained acreage, in the Town of Ontario to be 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 \$7.1 million, which includes a bio digester with thermal and electric distribution throughout 40+ acres, a 1.5 MW wind turbine and the road, water and sewer infrastructure necessary for industrial use. 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.

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 complete 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 and eliminate the need of several driveways to cross the railroad.

The Town of Ontario, Wayne County and the WISP have constructed 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. The Town of Ontario has recently completed a Generic Environment Impact Statement in order to prepare the area for not only the expansion of the infrastructure but to insure the ability to move forward quickly as the expansion begins to develop.

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.

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 specialized training programs. Monroe Community College also has a satellite campus 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 location of the Campus Center's in the Silver Hills Technology Park will allow programs to utilize 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.

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 as well as 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

both residents and businesses, this water upgrade is crucial to the retention and expansion of the northeastern Wayne County industrial base. 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.

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 and the western sections of Wayne County. The use of County Line Road as a major industrial parkway to serve both Monroe and Wayne Counties should be explored.

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 additional flights as well as larger private planes. 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 with a station to connect the Finger Lakes/Lake Ontario region of Central and Western New York with rail service. Grants totaling \$1,020,000 have been secured for this project by Senator Michael Nozzolio, but a funding gap 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.

Additionally, continuing rail service, primarily freight, but also passenger, between the Lyons Amtrak Passenger Station and Geneva, as a secondary rail service, is a priority. Transition from Norfolk-Southern owning the north south section to a local rail operator is expected. The improvement of infrastructure in the Lyons Industrial Park on Route 14 to coincide with the two interfacing rail services and a potential commercial canal port bring critical mass and opportunities to this rural canal-era community. The feasibility study for the port is underway, providing the ability to connect freight across the Great Lakes with businesses and communities deep in the heart of the Finger Lakes via the north south secondary rail.

A strategic plan for economic development within the County is in place. The plan was adopted by the Wayne County Board of Supervisors in November 2006 and will be

revisited during late 2009 or early 2010. The Wayne County IDA is currently in the process of developing a plan for sustainability, based on focus areas that include alternative energy & conservation; business and economic development; and water management, initially.

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 as well as an additional three to five sites within the County. The WISP model and the sustainability plan will be referenced as upgrades to other Industrial Parks are considered.

Strengthening downtown hubs is important in many aspects including quality of life. A strong downtown hub ensures quality shops and restaurants amongst other aspects that encourage residents and visitors. Consequently, in both the Strategic Plan and in regional plans/studies done for the area and Wayne County, this is a priority. Along with improving downtowns is the necessity to provide a new and recognized infrastructure; fiber optic. Establishing fiber optic will help provide the transportation of ideas and work product that the world seeks. The Wayne County IDA is securing the basic information on existing infrastructure that will allow Wayne County, its public safety entities, educational facilities, County IT and departments to develop the plan and secure funding to build this infrastructure.

Wayne County priority projects are listed in Table 31 on the following page.

Table 31 - Wayne County Priorities

	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
WA-1	Wayne Industrial Sustainability Park and pod infrastructure improvements—Ontario pod	Wayne County IDA	\$7.1 Million Federal, State, IDA, Private	TBD
WA-2	Water Improvements Village of Wolcott/Electromark	Wayne County	\$3.7 Million Federal, State, Private	TBD
WA-3	Water Improvements Town of Wolcott/Village of Red Creek	Wayne County	TBD	TBD
WA-4	Engineering for and Phase I Implementation of Build-Now NY standards in Industrial Parks	Wayne County IDA	\$1.2 million TBD, but mix of State, Federal and local	TBD
WA-5	Industrial Road-Town of Ontario in its entirety, Beh to Lincoln (see WA-1)	Wayne County IDA	\$5 Million TBD	TBD
WA-6	Amtrak Station- Lyons	Wayne County	\$13 Million Multiple	TBD
WA-7	Lyons Canal Port Development	TBD	TBD	TBD
WA-8	Improve Downtowns	TBD	\$240,000 State, County	TBD
WA-9	Fiber Optic Infrastructure	Wayne County	\$4 million	TBD

5.10 Wyoming County

The economic vitality of the County is closely tied to state and national business conditions that the county has little control over and this has been clearly evident during the current economic recession. This emphasizes the importance of having an aggressive and effective economic and business development effort. Successful rural counties continue to make a sustained commitment of adequate resources to retain and attract high-quality jobs.

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

- Continued contraction with the Wyoming County Chamber of Commerce to provide business attraction and retention activities.
- The Wyoming County Industrial Development Agency (WCIDA) has significantly increased economic development activity and interest in the areas of real estate and infrastructure development. The WCIDA has recently completed site work on the County's first industrial park in Arcade; the park's first business tenant is expecting to open in fall 2009.
- Commitment of significant amount of funds by the Board of Supervisors to support real estate and infrastructure development projects.
- Wyoming County received Empire Zone designation in 2006 and the County, through its established Zone Administrative Board, is actively promoting the available tax incentives and benefits. These incentives are available to companies that locate within the boundaries of the Empire Zone to create new jobs.
- Wyoming County continues to seek grant awards for economic development through the New York State Office for Small Cities.

After extremely challenging years in the early part of the decade due to lower than expected milk prices, the middle part of the decade saw a much needed rebound in milk prices. Dairy is the biggest industry in Wyoming County and supporting this economic sector is a top priority. In 2007 there were 705 farms, consisting of 210,800 acres, whose actual crops and livestock cash receipts totaled \$254,062,000, the second highest cash receipts total in New York State. Sadly, however, milk prices are once again extremely low. In fact at most dairy farms the cost of production is greater than the price received on a hundred weight of milk.

The big question going into the later stages of the decade is whether the national and upstate New York economies will continue to grow. High energy prices combined with increasing federal trade deficits could threaten the current expansion that is now being realized and felt. Depending upon milk prices, growers of grain/vegetable/corn may sell their products to ethanol producers rather than the dairy farmers if the ethanol projects offer the corn grower more money for its product.

The challenge for Wyoming County and other rural counties is that the service and technology based industries that drove the economic expansion and resurgence of recent years saw nearly all of the growth occur in urban/suburban 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 these “new economy” businesses.

As information technology continues to develop, rural America may overcome its disadvantaged location. However, rural areas must provide natural amenities, good schools, transportation access, and other infrastructure service components to attract, recruit and retain “new economy” employee, as an educated and trainable workforce is critical to attracting high wage technical and service positions.

The Wyoming County Chamber and the WCIDA work together with the Wyoming County Department of Planning and Development to support business retention and small business development through its Microenterprise Revolving Loan Fund focusing on downtown/community revitalization. The process includes regular on-site visits and/or communications with all manufacturers, major employers and companies with growth potential. Based on retention contacts, the offices identified above respond to issues, concerns and opportunities that are identified and revealed.

Retaining existing firms and assisting them is more important and cost effective than the recruitment of new companies. Approximately 70-80% of all business growth will come from the expansion/establishing a new subsidiary or modernization of existing firms that already employ local workers and pay local taxes. Supporting local entrepreneurs and private investment that will grow the next generation of employers is also essential. The existing Microenterprise Assistance and Downtown Revitalization programs are designed to focus their resources and efforts on small businesses and entrepreneurs. To this end, the revitalization of downtown commercial district corridors continues to also be a priority for the County.

A significant industrial project in Wyoming County is 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 manufacturing of roof shingles and is located in an Empire Zone. Although Hillcrest has entered into a mutually beneficial relationship with a major roofing manufacturer, inconvenient rail access causes the product to be loaded adjacent to a residential area located a half mile from the plant. The Wyoming County IDA is continuing to work with state and federal agencies to provide funding to create a rail spur off the existing rail line into the site to facilitate more efficient and effective transport of materials. Additional construction of a warehouse/storage dock platform is targeted to allow more companies to utilize the rail line as diesel gas prices continue to climb. The platform would also be of interest to another similar sandblasting company, which has expressed interest in the site and could potentially create upwards of sixty new jobs. The creation of a new rail spur would significantly increase the attractiveness and usefulness of the site and the WCIDA continues to work on closing a \$170,000 funding gap that still exists for the rail improvement.

Other priorities for the County include infill redevelopment of brownfield sites in the Village center business district, which will increase adjacent property values and provide new space for development, limiting the pressure for sprawling development, and capitalizing on the large tourism industry that is drawn into the region to visit Letchworth State Park.

Infrastructure construction is almost completed at the Arcade Business Park as water and wastewater have already been extended to the site which is now privately owned by the Krog Corporation, which has been given designated developer status for the business park. A lack of infrastructure such as municipal water/sewer, access to an interstate highway and inadequate telecommunication services are still major barriers to future development. Also hindering economic development is the lack of shovel ready development sites and buildings within the County.

Wyoming County has additionally completed the following economic development projects:

- Roadway and infrastructure upgrades at the Arcade Business Park
 - \$500,000 in public sector investment from Wyoming County IDA
 - 100 jobs estimated to be created
- Site preparations in anticipation of improvements to the Westinghouse site
 - \$500,000 in private sector investment
 - 30 jobs estimated to be created

The Wyoming County Board of Supervisors has put an emphasis on accessing stimulus funds through the American Recovery and Re-investment Act (ARRA) in 2009 for transportation purposes (rail and roads), as well as telecommunications/fiber optics/broadband infrastructure needs that are specifically earmarked for rural areas. Additionally, Wyoming County continues to be the leader in New York State regarding the number of acres used in wind farm turbine energy projects so alternative energy initiatives such as bioenergy manure digesters and the manufacturing and assembly of wind turbine components has become a County priority. Wyoming County continues to pursue brownfield redevelopment through an approved Brownfield Opportunity Area Grant for the A & A Metals site in the Village of Perry, as well as working with the NYSDEC to market the former Robeson Building in the Town of Castile. It is also a County priority to attract a name brand franchise hotel chain to locate either in Arcade, Attica or Warsaw. It is felt that locations in close proximity to the State prison, Letchworth State park, an amusement park, government center and County hospital would be the driving forces in keeping occupancy rates at a profitable level on a year round basis. Finally, the County recognizes the need to expand and grow agribusinesses in Wyoming County and has received and earmarked federal funds to initiate a Farm Diversification Value Added Pilot Demonstration Program to its Microenterprise portfolio. Large dairy farms with the County have also begun investing in automated assembly line carousels. These carousels reduce milking times and allow more cows to be milked per hour giving the dairy farmer the opportunity to milk cows three times a day instead of two.

Wyoming County priority projects are listed below in Table 32.

Table 32 - Wyoming County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
WY-1	Wyoming County Rail Initiative	Wyoming County IDA	\$1.5 Million USEPA, NYSDEC, Local	25
WY-2	Alternative Energy Initiatives-Wind-tamer turbines/bioenergy manure digester processing	Wyoming County Business Center	\$4.5 Million NYSERDA, USDA	5
WY-3	Redevelopment of A&A Facility in Perry	Wyoming County Business Center	TBD NYSDEC, USDA, EDA, Local	TBD
WY-4	Redevelopment of Robeson Building in Town of Castile	Wyoming County Business Center	TBD NYSDEC, USDA, EDA, Local	TBD
WY-5	County Telecommunications, Fiber Optic & Cell Tower Improvements	Wyoming County Planning & Development	TBD TBD	TBD
WY-6	Hotel Attraction (new build or renovation for brand-name hotel)	Wyoming County Planning & Development/Wyoming County Business Center	\$1.0 Million USDA, GOSC, Local	50
WY-7	North Main Street Sewer Extension-Warsaw	Village of Warsaw	\$850,000 EFC, USDA, Local	TBD
WY-8	Silver Lake Country Club Redevelopment Project in Castile	Village of Castile	TBD TBD	12
WY-9	Perry Business and Technology Park	Wyoming County Business Center	\$2.2 Million EDA, USDA, Local	100
WY-10	Tri-County Business Park	Village of Arcade	\$4.0 Million EDA, USDA Local	TBD
WY-11	Medical Mall Professional Services Building in Attica	Wyoming County Planning & Development	TBD TBD	TBD

Table 32 - Wyoming County Priorities (Continued)

Proposed Project	Proposed Project	Proposed Project	Proposed Project	Proposed Project
WY-12	Boxlers Dairy Farm Agritourism Project in Orangeville	Wyoming County IDA	\$4.0 Million TBD	10
WY-13	TPI Expansion Village of Arcade	Wyoming County IDA	\$9 Million	TBD
WY-14	Agricultural Diversification Plan	Wyoming County IDA	TBD	TBD

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's location in the heart of the Finger Lakes offers many natural amenities creating a high quality of life attraction. Additional amenities important for economic development are also present, such as electric rates significantly below market 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.

The past several years have seen 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 Pharmacy 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 continues to drive tourism growth in Yates County. Tourism has developed as the leading economic engine for the county, bringing visitors and spending to the area. The 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 \$90 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 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 the future. The creation of a suitable development plan is a primary objective of an inter-municipal task force created in 2006. This Waterfront Revitalization Committee selected a consultant to construct a development plan around the waterfront and the Keuka Lake Outlet.

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.

Yates County IDA has 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.

Yates County obtained Empire Zone certification in 2008 and has four sites within designated Empire Zones. Businesses locating within these sites are eligible for various tax credits and incentives helping to reduce the cost of doing business. While the future of the Empire Zone program is unclear at this point, the recently acquired designation allows the County to compete on the same playing field as other New York State Counties.

The development of space is a major goal of the IDA in 2009, since most of the space within the industrial parks has been filled. One or two speculative buildings may be developed to provide available space for new or expanding businesses. Other initiatives being developed for 2009 include the attraction of a highly educated workforce to live in Yates County. To this end work is being done to increase wages, provide new housing options and to increase the quality of life to help retain current residents and attract new people to the County.

Yates County's priority projects are shown in Table 33 on the following page.

Table 33 - Yates County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
Y-1	Waterfront Redevelopment of Former Penn Yan Marine Facility	Yates County IDA	\$20,000,000 EPA, DEC, County	TBD
Y-2	Installation of Fiber Optic Cable into and throughout Yates County	Yates County Government & Yates County IDA	\$3,000,000 Stimulus Funds, County	TBD
Y-3	Dundee Waste Water Treatment Plant Upgrades	Yates County IDA	\$2,000,000 NYS EFC CWSRF, NYS Small Cities, EDA	TBD
Y-4	Keuka Park Water District Water Main Replacement	Town of Jerusalem	\$1,875,000 Stimulus, NYS, Local	TBD
Y-5	Keuka Street Water and Sewer Replacements	Penn Yan Village	\$1,700,000 Stimulus, NYS, Local	TBD
Y-6	Elmwood Avenue Railroad Siding	Penn Yan Village	\$1,150,000 Stimulus, NYSDOT, Local	TBD
Y-7	Upgrade Himrod Water District & Ext. #1, Milo	Yates County IDA	\$2,850,000 NYS EFC DWSRF, Local	TBD
Y-8	Branchport/West Bluff Drive Sewer District , Jerusalem	Yates County IDA	\$7,175,000 NYS EFC CWSRF	TBD
Y-9	Torrey Water District #1 , Torrey	Yates County IDA	\$4,000,000 NYS EFC DWSRF, USDA, EDA, Local	TBD
Y-10	Route 14 Eastern Corridor Water District	Yates County IDA	\$15,700,000 EDA, USDA, EFC, NYS Small Cities	TBD

Chapter 6 - 2008 Goals, Objectives, Strategies and Measures

6.1 Stakeholder Input Sessions

Three stakeholder input sessions were held throughout the G-FL region on March 26, 27 and 28, 2008 with the purpose of defining a regional vision and setting goals, strategies and measures. The first meeting was held in Canandaigua, NY, on the eastern side of the region. The second meeting was held in Rochester, NY, the geographic center of the region. The last meeting was held on the western side of the region in Batavia, NY. Invitations were sent to various stakeholders throughout the region. Stakeholders present at the input sessions were a combination of public sector and private sector representatives. While valuable input into the CEDS development came from these sessions, a sense of cooperation between public and private sector participants was also forged to ensure collaboration on economic development projects, initiatives, and programs. A list of attendees and a copy of the presentation given at the three meetings can be found in Appendices 8 and 9.

6.2 Goals, Objectives, Strategies and Measures

The goals, strategies, and measures were developed in 2008 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 Stakeholder input meeting notes from 2008 can be found in Appendix 10. This section has been updated for 2009.

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 with partners 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 regional and/or county programs or initiatives 	<ul style="list-style-type: none"> Number and diversity of new partnerships and collaborations Number of public and private partners G/FLRPC has in its programs and initiatives

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 including Finger Lakes WIRED and the Roadmap for the Revitalization of Upstate New York, state-led efforts such as the Regional Blueprints, the Food and Beverage cluster including the Geneva Agriculture Technology Park, the technology led clusters through Infotonics and HTR, and industry-led cluster organizations Secure funding to more aggressively pursue the alternative energy sector Provide assistance to municipalities in siting wind farms and other alternative energy production facilities 	<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 Number of professional support inquiries regarding cluster related businesses 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 Assistance to municipalities in developing local economic development plans 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 Pursue the 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 Increase number of county inventory and assessments A complete inventory of the region's water and sewer lines and usage capacity Improvement of regional infrastructure for economic and workforce development and growth
To continue to support the efforts of Finger Lakes Wired	<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 Managing Director, Governing Board and Committees. 	<ul style="list-style-type: none"> Correspondence between G/FLRPC and the EDA regarding Finger Lakes Wired Meetings attended and contribution to Finger Lakes Wired and regional workforce and development of economic talent

To continue to support regional workforce training and development efforts	<ul style="list-style-type: none"> • Serve as a connection between Finger Lakes Wired, Workforce Investment Boards, The Entrepreneurial Network and the EDA • Continue to support Finger Lakes Wired through the work of the Managing Director, Governing Board and Committees 	<ul style="list-style-type: none"> • Job and investment measures associated with Finger Lakes WIRED, WIBS, TEN • Private sector leveraged investment
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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 and advanced manufacturing 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 • Number of jobs created and retained • 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 and assist in development and implementation of Finger Lakes Wired initiatives. 	<ul style="list-style-type: none"> • Number of meetings attended and assistance provided to Finger Lakes Wired

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 • Support the activities of The Entrepreneur’s Network 	<ul style="list-style-type: none"> • The establishment of optics and med-tech commercialization centers • Number of participant referrals given to The Entrepreneur’s Network
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 • 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 • Utilization of information produced by the RIT CIMS <i>Roadmap</i> and assistance provided in implementation activities

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 • Support building funding for and collaboration among partners for rural projects 	<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"> • Coordinate the Western Erie Canal Main Street Program • Continue to support the Livingston-Wyoming County Alliance for Business Growth • Assist in the development of downtown revitalization plans for Villages of Macedon and Medina • Continued assistance for the Town of Wheatland Economic Development Plan 	<ul style="list-style-type: none"> • Number of Main Street business created and sustained • Number and types of regional investments • Private sector leveraged investment • Number of jobs created and retained • Distribution of a guidebook for the planning of Main Streets and Commercial Districts • Provision of planning services to municipalities participating in the Western Erie Canal Main Street 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, Steering Committee and act as managing director of Finger Lakes Wired 	<ul style="list-style-type: none"> • Workforce training • Number of jobs created and retained

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"> • Use NYS Brownfield Opportunity Areas program and redevelopment of brownfield sites 	<ul style="list-style-type: none"> • Use of the NYS Brownfield Opportunity Areas program • Amount of private sector investment in brownfield sites
To encourage efficient land use and development patterns	<ul style="list-style-type: none"> • Education, training and assistance related to comprehensive plans and land-use regulation control • 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 developed and/or revised comprehensive plans and implementation of comprehensive plans • Number of attendees at Spring and Fall Local Government Workshop • Assistance to local governments

To encourage efficient local governments	<ul style="list-style-type: none"> • Perform fiscal analyses and seek funding for programs which aim to consolidate and/or share services • Perform analyses examining local government efficiency 	<ul style="list-style-type: none"> • Number of consolidated and/or shared services studies • 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 • Continue to serve on the Seneca County Docks & Moorings Committee for Seneca and Cayuga Lakes 	<ul style="list-style-type: none"> • Distribution of the <i>Protecting Water Resources through Local Regulation: A Guide for New York Municipalities</i> publication • Development and implementation of watershed management plans • Implementation of Stormwater Phase II regulations • Assistance with the development of guidelines and policy for Docks & Moorings
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, revision and implementation of All-Hazard Mitigation Plans

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 • Support efforts to develop the region as an agri-tourism destination 	<ul style="list-style-type: none"> • Number of jobs created and retained • Amount of private sector investment • Number professional support inquiries
To further develop and promote the recreational attributes of the region	<ul style="list-style-type: none"> • Continue to develop the concept of blueways trails • Support the efforts of local and regional tourism agencies to promote the recreational and natural attributes and attractions of the region 	<ul style="list-style-type: none"> • Implementation of a NYS blueways program • Support provided to local and regional tourism agencies through provision of data, information or services

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 Coordinate the Western Erie Canal Main Street Program 	<ul style="list-style-type: none"> Implementation of Erie Canal related projects Provision of planning services to municipalities participating in the Western Erie Canal Main Street Program Business and job creation/and retention in Western Erie Canal villages
To provide historic preservation planning services	<ul style="list-style-type: none"> Continue to assist region, counties, and municipalities with historic preservation planning initiatives and support 	<ul style="list-style-type: none"> Delivery of planning services

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 programs and initiatives Work with and support any regional and/or county programs or initiatives 	<ul style="list-style-type: none"> Number of professional support inquiries Number and diversity of new and existing partnerships in which G/FLRPC is involved Number of 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 and Finger Lakes Wired 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 of professional support inquiries Job creation and retention Job training initiatives and measures of number of job training programs

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"> • Job creation and retention • Private sector investment leveraged • Number of firms contacted and loans closed • Number of financial packages assembled to retain manufacturing firms
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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"> • Secure and leverage 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) • Secure and leverage funding for food and beverage cluster 	<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 • Job creation and retention • Private sector investment • Number of R&D initiatives commercialized • 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 the MPO 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	<ul style="list-style-type: none">• Assistance with implementation 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
To improve telecommunications in the region	<ul style="list-style-type: none">• Pursue development of a Telecommunications Infrastructure Regional Development Plan and assistance with county telecommunications inventories and assessments	<ul style="list-style-type: none">• County telecommunications inventory and assessment with accurate GIS files• Telecommunications Infrastructure Regional Development Plan• Amount of funding secured and leveraged for telecommunications infrastructure investments

Chapter 7 – 2008-2009 Plan of Action

This section provides an overview of activities that G/FLRPC has undertaken in 2008 and the early part of 2009, as well as ongoing activities and activities that G/FLRPC can pursue going forward. These actions involve work on projects in economic development, planning, coordination and training that 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.
 - Work with the RIT CIMS Center in assisting to implement its *Roadmap for the Revitalization of Upstate New York Manufacturing* related programs and activities
 - Continue to work with Empire State Development on development and implementation of Regional Economic Development Blueprint.
- 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.
 - 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.
 - Assist with the development of a public-private partnership to build organizational capacity for ethanol and bio-diesel fuel investment in the region.
- 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.
 - Assist with telecommunications inventories and assessments for the remaining counties in the region that have not completed one with GIS files that accompany it.
 - Assist with the use of the telecommunications inventories and assessments to develop a Regional Telecommunications Infrastructure Development Plan which will provide a strategy for building fiber optic 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.
 - Develop revisions to the Transportation Analysis Zones (TAZ)
 - Continue to produce the annual Land Use Monitoring Report.
 - Continue to work with NYSDERDA and other organizations to provide support to municipalities surrounding wind energy development.
 - Attempt to 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.
- Provide data and information assistance for use in the site selection process
 - Assist with the development of an asset map and gap analysis 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 business attraction and County Industrial Development Agencies/Economic Development Departments in the site selection process.
 - Provide assistance with mapping and data collection projects in support of site selection activities.
 - 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.
 - Propose a community-wide brownfield assessment that develops a regional brownfield education program, inventory and database and redevelopment/revitalization plan.
 - Administer or assist in Brownfield Opportunity Area programs, which facilitate the public and private sector working together to gain a better understanding of redevelopment options for brownfield sites and help to garner private investment in brownfield sites.
- Support entrepreneurial activities and programs throughout the region.
 - Support the entrepreneurial activities of Finger Lakes Wired partners, including The Entrepreneur's Network and provide referrals for possible program participants.
- 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 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.
 - Cultivate new programs and identify funding streams per the input of regional economic development stakeholders.
 - Build funding for and collaborations among partners for additional public loan funds.
- 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.
 - Provide downtown and main street revitalization planning services to municipalities participating in the Western Erie Canal Main Street Program.

- Assist in the development of 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 blueways trails initiative

7.2 Professional Support

- G/FLRPC will continue to support job creation and attraction through regional workforce development that includes business and economic development as well as continued participation with Workforce Investment Boards and Finger Lakes Wired by providing support during the implementation phase of initiatives. G/FLRPC will serve on the Finger Lakes Wired Governing Board and Steering Committee. 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.
- Provide Hazard Mitigation Services that comply with state and national standards.
 - FEMA has approved the Genesee, Livingston, Orleans, Wayne and Wyoming Counties All-Hazard Mitigation Plans. G/FLRPC can continue to provide All-Hazard Planning and implementation assistance. By having these plans in place, communities are in a better position to respond to disasters from a land use and economic development perspective.
 - G/FLRPC may 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 completed the revisions to the nine county Census Master Address Files for the 2010 Census. G/FLRPC will continue to work with regional, state, and federal 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

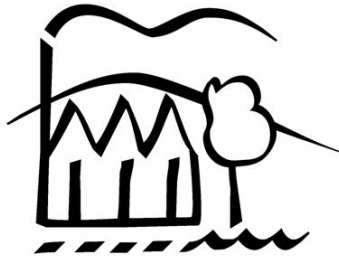
- Fill information and data services requests from citizens, businesses, not-for-profit organizations and public agencies so regional clients are equipped with the most recent and effective data.
- Maintain socio-economic and demographic data. An aspect of this service is a dedicated section of G/FLRPC's website that features or links to currently available data.
 - 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.

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.
- 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.

Appendices

Appendix 1 - CEDS Stakeholder Input Session Invitation



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

Genesee/Finger Lakes Regional Planning Council is in the process of preparing the annual regional Comprehensive Economic Development Strategy (CEDS). Development of the CEDS is funded by the U.S. Department of Commerce Economic Development Administration.

The CEDS is intended to guide economic growth in the region and to create jobs, cultivate a stable and diverse economy and improve the 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 implementation strategy to make that vision a reality.

Please join us at any one of the following stakeholder input sessions:

- ♦ Ontario County Office Building, 3rd Floor Conference Room
20 Ontario Street, Canandaigua, NY
Wednesday, March 26 from 9:30am-11:30am
- ♦ Ebenezer Watts Conference Center
49 South Fitzhugh Street, Rochester, NY
Thursday, March 27 from 9:00am-11:00am
- ♦ Genesee County Economic Development Center, Board Room
1 Mill Street, Batavia, NY
Friday, March 28 from 9:30am-11:30am

If you plan on attending, please contact Daniel Burton
at (585) 454-0190 ext. 12 or dburton@gflrpc.org

For additional information about the CEDS visit <http://www.gflrpc.org/ProgramAreas/EconomicDevelopment/CEDS.htm>

Appendix 2 - CEDS Summary Sheet

**Genesee/Finger Lakes Regional Planning Council
Comprehensive Economic Development Strategy
Goals (2008-2009)**

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

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 Finger Lakes Wired

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 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

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 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.

- 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

Appendix 3 - Major Industry Sectors Present in the G-FL Region

Table A-3 – 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-3 – 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
Information	493	Warehousing and Storage
	511	Publishing Industries
	512	Motion Picture & Sound Recording
	515	Broadcasting (except Internet)
	516	Internet Publishing and Broadcasting
	517	Telecommunications
	518	ISPs, Search Portals, & Data Processing
Finance and Insurance	519	Other Information Services
	522	Credit Intermediation & Related Activity
	523	Financial Investment & Related Activity
	524	Insurance Carriers & Related Activities
Real Estate, Rental and Leasing	525	Funds, Trusts & Other Financial Vehicles
	531	Real Estate
Professional and Technical Services	532	Rental and Leasing Services
	541	Professional and Technical Services

Table A-3 – 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	611	Educational Services
	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 4 - Economic Indicators for the G-FL Region by Industry Subsector (2007)

Table A-4 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2007)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Crop Production	253	3,326	\$22,830	1.52	1,143
Animal Production	145	2,155	\$31,432	2.39	1,253
Forestry and Logging	10	53	\$29,276	0.20	-213
Agriculture & Forestry Support Activity	35	276	\$20,473	0.21	-1,067
Mining (except Oil and Gas)	36	599	\$48,029	0.67	-293
Utilities	25	1,981	\$86,507	0.89	-247
Construction of Buildings	875	5,287	\$45,532	0.74	-1,866
Heavy and Civil Engineering Construction	123	2,061	\$52,048	0.51	-1,941
Specialty Trade Contractors	1,786	12,337	\$44,721	0.63	-7,168
Food Manufacturing	125	5,780	\$39,816	0.97	-202
Beverage & Tobacco Product Manufacturing	48	1,772	\$54,928	2.22	976
Textile Mills	4	255	\$48,858	0.37	-433
Textile Product Mills	19	317	\$30,365	0.49	-327
Apparel Manufacturing	12	956	\$32,971	1.10	89
Wood Product Manufacturing	55	736	\$30,288	0.35	-1,348
Paper Manufacturing	37	1,757	\$46,435	0.95	-90
Printing and Related Support Activities	150	3,219	\$41,857	1.28	698
Petroleum & Coal Products Manufacturing	8	120	\$50,073	0.26	-347
Chemical Manufacturing	39	12,353	\$72,191	3.55	8,874
Plastics & Rubber Products Manufacturing	81	5,648	\$39,657	1.85	2,595
Nonmetallic Mineral Product Mfg	56	1,747	\$43,744	0.86	-279
Primary Metal Manufacturing	14	471	\$43,173	0.25	-1,376
Fabricated Metal Product Manufacturing	329	9,137	\$44,961	1.45	2,837
Machinery Manufacturing	285	15,455	\$66,985	3.22	10,657
Computer and Electronic Product Mfg	114	8,744	\$67,057	1.70	3,595
Electrical Equipment and Appliances	24	1,538	\$49,306	0.89	-195
Transportation Equipment Manufacturing	32	5,306	\$53,318	0.77	-1,616
Furniture and Related Product Mfg	57	864	\$34,731	0.40	-1,281
Miscellaneous Manufacturing	112	5,115	\$79,365	1.97	2,519
Merchant Wholesalers, Durable Goods	815	11,444	\$56,790	0.91	-1,141
Merchant Wholesalers, Nondurable Goods	318	5,319	\$52,611	0.64	-2,993
Electronic Markets and Agents/Brokers	433	2,070	\$64,381	0.61	-1,306
Motor Vehicle and Parts Dealers	509	7,473	\$37,433	0.97	-248
Furniture and Home Furnishings Stores	196	1,759	\$27,294	0.76	-557
Electronics and Appliance Stores	204	1,973	\$32,510	0.89	-235
Building Material & Garden Supply Stores	338	5,068	\$29,118	0.96	-220
Food and Beverage Stores	567	17,200	\$18,766	1.49	5,661
Health and Personal Care Stores	290	3,611	\$28,957	0.90	-420
Gasoline Stations	428	3,438	\$17,414	0.99	-50
Clothing and Clothing Accessories Stores	494	5,076	\$14,375	0.84	-999
Sporting Goods/Hobby/Book/Music Stores	245	2,724	\$14,741	1.02	47
General Merchandise Stores	196	10,511	\$18,170	0.86	-1,735
Miscellaneous Store Retailers	399	3,057	\$17,219	0.87	-474
Nonstore Retailers	141	1,447	\$32,483	0.82	-310

Table A-4 – Establishments, Employment, Average Annual Wage, Location Quotients And Export Employment for the G-FL Region by Industry Subsector (2007) (continued)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Air Transportation	15	256	\$41,671	0.13	-1,732
Truck Transportation	296	3,337	\$36,824	0.57	-2,498
Transit and Ground Passenger Transport	63	2,330	\$18,223	1.42	693
Pipeline Transportation	12	37	\$70,086	0.23	-126
Scenic and Sightseeing Transportation	8	45	\$29,181	0.39	-71
Support Activities for Transportation	76	799	\$35,699	0.34	-1,562
Couriers and Messengers	53	1,325	\$36,650	0.56	-1,031
Warehousing and Storage	59	1,657	\$33,123	0.62	-1,014
Publishing Industries	106	3,190	\$41,057	0.88	-453
Motion Picture & Sound Recording	47	513	\$20,313	0.34	-1,018
Broadcasting (except Internet)	27	946	\$42,361	0.71	-382
Telecommunications	117	4,938	\$69,265	1.18	762
ISPs, Search Portals, & Data Processing	50	558	\$89,687	0.51	-540
Other Information Services	57	551	\$39,787	1.09	44
Credit Intermediation & Related Activity	550	7,323	\$48,051	0.63	-4,299
Financial Investment & Related Activity	273	1,783	\$117,867	0.51	-1,689
Insurance Carriers & Related Activities	639	6,489	\$57,881	0.74	-2,264
Funds, Trusts & Other Financial Vehicles	15	82	\$105,824	0.23	-279
Real Estate	831	5,072	\$29,179	0.84	-987
Rental and Leasing Services	221	1,997	\$30,165	0.78	-562
Professional and Technical Services	2,641	24,453	\$52,985	0.79	-6,501
Management of Companies and Enterprises	171	11,706	\$77,963	1.57	4,248
Administrative and Support Services	1,288	24,525	\$28,394	0.75	-8,037
Waste Management and Remediation Service	88	1,451	\$45,564	1.01	18
Educational Services	331	24,302	\$47,134	2.62	15,040
Ambulatory Health Care Services	1,596	18,595	\$41,404	0.84	-3,581
Hospitals	16	24,374	\$41,498	1.35	6,279
Nursing and Residential Care Facilities	350	17,192	\$25,302	1.44	5,261
Social Assistance	644	13,379	\$22,484	1.45	4,165
Performing Arts and Spectator Sports	119	1,227	\$24,915	0.74	-422
Museums, Parks and Historical Sites	22	798	\$19,710	1.56	285
Amusement, Gambling & Recreation	351	6,000	\$15,274	1.04	240
Accommodation	172	3,632	\$19,488	0.48	-3,888
Food Services and Drinking Places	2,103	33,558	\$13,035	0.87	-5,033
Repair and Maintenance	841	4,651	\$30,428	0.92	-409
Personal and Laundry Services	667	4,674	\$20,157	0.88	-625
Membership Organizations & Associations	962	8,435	\$18,198	1.56	3,028
Private Households	342	517	\$18,272	0.23	-1,712
Federal Government	250	5,582	\$52,200	0.51	-5,471
State Government	98	14,568	\$49,318	0.78	-6,928
Local Government	643	69,518	\$38,456	1.22	12,693
Unclassified	733	719	\$21,662	0.92	-60
Total, All Industries	28,411	548,802	\$39,824	-	-450
Total, All Private	27,720	459,134	\$39,579	-	-745

Source: Quarterly Census of Employment and Wages

Appendix 5 - Economic Indicators for the G-FL Region by Industry Subsector (2000)

Table A-5 – 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	\$21,768.64	1.23	541
Animal Production	147	1,934	\$26,330.94	2.24	1,071
Forestry and Logging	5	68	\$33,496.29	0.21	-262
Agriculture & Forestry Support Activity	41	557	\$23,915.24	0.41	-791
Oil and Gas Extraction	3	16	\$55,081.59	0.03	-517
Mining (except Oil and Gas)	44	404	\$46,093.81	0.42	-554
Utilities	16	2,483	\$82,718.00	0.97	-81
Construction of Buildings	761	4,947	\$44,469.67	0.71	-2,016
Heavy and Civil Engineering Construction	127	1,993	\$52,684.52	0.46	-2,340
Specialty Trade Contractors	1,792	13,049	\$42,876.55	0.73	-4,933
Food Manufacturing	121	6,214	\$38,127.39	0.94	-409
Beverage & Tobacco Product Manufacturing	22	1,685	\$54,860.30	1.91	802
Textile Mills	7	282	\$50,205.44	0.17	-1,332
Textile Product Mills	17	328	\$29,503.83	0.36	-595
Apparel Manufacturing	16	1,032	\$31,558.13	0.49	-1,087
Wood Product Manufacturing	56	837	\$29,028.84	0.32	-1,777
Paper Manufacturing	43	2,265	\$41,517.72	0.88	-314
Printing and Related Support Activities	170	3,468	\$44,328.64	1.01	28
Petroleum & Coal Products Manufacturing	22	173	\$57,859.57	0.33	-352
Chemical Manufacturing	51	24,344	\$69,323.82	5.82	20,164
Plastics & Rubber Products Manufacturing	104	7,346	\$39,180.76	1.81	3,287
Nonmetallic Mineral Product Manufacturing	67	2,329	\$46,119.23	0.99	-34
Primary Metal Manufacturing	11	525	\$50,777.43	0.20	-2,127
Fabricated Metal Product Manufacturing	340	11,100	\$42,369.82	1.49	3,626
Machinery Manufacturing	330	22,446	\$65,568.60	3.62	16,242
Computer and Electronic Product Mfg	107	9,912	\$64,708.29	1.28	2,151
Electrical Equipment and Appliances	25	1,749	\$42,101.50	0.69	-771
Transportation Equipment Manufacturing	31	7,817	\$62,424.16	0.89	-948
Furniture and Related Product Manufacturing	60	772	\$33,619.64	0.27	-2,127
Miscellaneous Manufacturing	111	5,550	\$54,890.04	1.78	2,424
Merchant Wholesalers, Durable Goods	968	12,302	\$56,294.49	0.89	-1,559
Merchant Wholesalers, Nondurable Goods	352	5,391	\$49,273.74	0.61	-3,411
Electronic Markets and Agents/Brokers	367	1,431	\$63,882.69	0.54	-1,202
Motor Vehicle and Parts Dealers	507	7,640	\$39,488.13	0.97	-233
Furniture and Home Furnishings Stores	206	1,845	\$29,303.67	0.80	-471
Electronics and Appliance Stores	225	1,945	\$39,187.67	0.81	-461
Building Material & Garden Supply Stores	345	5,406	\$26,775.78	1.11	535
Food and Beverage Stores	594	18,309	\$16,492.57	1.43	5,548
Health and Personal Care Stores	283	3,630	\$23,206.01	0.92	-325
Gasoline Stations	479	3,810	\$17,563.68	0.95	-180
Clothing and Clothing Accessories Stores	522	4,849	\$15,191.91	0.86	-784
Sporting Goods/Hobby/Book/Music Stores	254	2,877	\$15,402.97	0.99	-43
General Merchandise Stores	162	9,508	\$18,042.04	0.79	-2,515
Miscellaneous Store Retailers	480	3,351	\$18,143.98	0.78	-943
Nonstore Retailers	128	2,406	\$30,588.88	1.14	304

Table A-5 – 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	\$53,805.47	0.14	-2,243
Truck Transportation	331	3,186	\$37,243.59	0.53	-2,807
Transit and Ground Passenger Transport	53	2,291	\$26,681.72	1.44	704
Pipeline Transportation	8	40	\$67,149.70	0.20	-156
Scenic and Sightseeing Transportation	7	35	\$20,835.77	0.30	-82
Support Activities for Transportation	66	687	\$31,871.72	0.30	-1,604
Couriers and Messengers	44	2,040	\$31,587.89	0.79	-544
Warehousing and Storage	44	677	\$32,923.59	0.31	-1,518
Publishing Industries	120	3,313	\$43,880.93	0.75	-1,098
Motion Picture & Sound Recording	69	994	\$14,843.17	0.61	-635
Broadcasting (except Internet)	25	980	\$43,290.18	0.67	-484
Internet Publishing and Broadcasting	5	90	\$51,353.07	0.42	-125
Telecommunications	102	5,443	\$86,287.53	1.01	61
ISPs, Search Portals, & Data Processing	95	1,823	\$54,467.00	0.84	-352
Other Information Services	41	293	\$14,801.85	1.49	96
Credit Intermediation & Related Activity	455	7,507	\$44,920.83	0.69	-3,357
Financial Investment & Related Activity	176	1,877	\$111,368.98	0.55	-1,554
Insurance Carriers & Related Activities	761	5,734	\$50,224.22	0.61	-3,733
Funds, Trusts & Other Financial Vehicles	11	72	\$48,778.22	0.20	-289
Real Estate	748	5,333	\$28,040.21	0.95	-262
Rental and Leasing Services	220	2,190	\$27,784.46	0.77	-654
Professional and Technical Services	2,497	23,941	\$53,763.21	0.83	-4,773
Management of Companies and Enterprises	131	10,948	\$73,920.29	1.43	3,290
Administrative and Support Services	1,135	25,562	\$24,486.35	0.77	-7,806
Waste Management and Remediation Service	70	1,223	\$41,622.57	0.92	-111
Educational Services	275	17,377	\$49,578.43	1.70	7,181
Ambulatory Health Care Services	1,528	18,254	\$36,237.63	0.99	-170
Hospitals	18	23,957	\$36,009.88	1.42	7,099
Nursing and Residential Care Facilities	270	14,333	\$24,812.44	1.30	3,319
Social Assistance	612	11,409	\$21,349.22	1.44	3,477
Performing Arts and Spectator Sports	125	1,108	\$30,808.33	0.68	-515
Museums, Parks and Historical Sites	20	747	\$19,782.82	1.59	276
Amusement, Gambling & Recreation	319	5,292	\$15,958.96	0.96	-229
Accommodation	143	4,571	\$19,621.96	0.57	-3,467
Food Services and Drinking Places	2,135	32,571	\$12,651.79	0.93	-2,343
Repair and Maintenance	776	4,063	\$31,433.90	0.77	-1,232
Personal and Laundry Services	684	4,292	\$19,975.28	0.81	-1,009
Membership Organizations & Associations	803	7,095	\$18,390.67	0.62	-4,346
Private Households	472	760	\$15,661.64	0.41	-1,089
Federal Government	191	5,463	\$49,874.36	0.45	-6,753
State Government	96	14,635	\$49,325.50	0.72	-5,777
Local Government	574	65,766	\$35,190.68	1.17	9,749
Unclassified	157	308	\$16,798.33	0.28	-778
Total, All Industries	27,211	561,926	\$39,507.09	-	-5,412
Total, All Private	26,350	476,062	\$39,682.58	-	-2,631

Source: Quarterly Census of Employment and Wages * Average Annual wage expressed in 2007 dollars

Appendix 6 - Change in Economic Indicators for the G-FL Region by Industry Sector

Table A-6 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Sector (2000-2007)

Industry Sector	Change in Establishments		Change in Employment		Change in Average Annual Wage**	
	Number	Percent	Number	Percent	Dollars	Percent
Agriculture, Forestry, Fishing & Hunting	-17	-3.68%	-1796	-32.63%	1,035	4.36%
Mining	3	7.89%	-19	-5.19%	-2,799	-6.02%
Construction	133	4.96%	-298	-1.49%	1,541	3.48%
Manufacturing	-99	-5.78%	-28735	-26.08%	614	1.08%
Wholesale Trade	-107	-6.34%	-654	-3.42%	-235	-0.43%
Retail Trade	-158	-3.77%	-2269	-3.46%	428	1.93%
Transportation and Warehousing	23	4.06%	-7425	-79.56%	-1,691	-5.06%
Information	-45	-9.80%	-2252	-17.41%	-4,657	-7.72%
Finance and Insurance	80	5.69%	488	3.21%	5,267	9.55%
Real Estate and Rental and Leasing	94	9.69%	-452	-6.01%	1,464	5.23%
Professional and Technical Services	165	6.61%	105	0.44%	-358	-0.66%
Management of Companies and Enterprises	46	36.22%	574	5.30%	4,719	6.35%
Administrative and Waste Services	197	16.57%	-824	-3.11%	4,431	17.66%
Educational Services	71	27.00%	6374	37.30%	-2,051	-4.10%
Health Care and Social Assistance	183	7.54%	1111	1.63%	3,410	10.91%
Arts, Entertainment, and Recreation	29	6.22%	871	12.19%	-1,476	-7.91%
Accommodation and Food Services	10	0.44%	77	0.21%	164	1.21%
Other Services	91	3.33%	2063	12.73%	-84	-0.38%
Total, All Government	131	15.21%	3776	4.40%	2,489	6.46%
Unclassified	664	445.64%	517	176.45%	5,087	30.99%
Total, All Private	1322	5.02%	-16939	-3.56%	-83	-0.21%
Total, All Industries	1451	5.33%	-13163	-2.34%	325	0.82%

Source: Quarterly Census of Employment and Wages

** Average Annual wage expressed in 2007 dollars

Appendix 7 - Assumptions in Location Quotient Approach

The first location quotient approach assumption is 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 8- Stakeholder Input Session Attendees, 2008

Table A-8 – CEDS Stakeholder Input Sessions Attendee List, 2008	
Name	Organization and/or Affiliation
Mary Lou Hamm	Genesee, Livingston, Ontario and Wyoming WIB
Lina LaMattina	The Best Center, Genesee Community College
Chad Zambito	Genesee County Economic Development Center
Don Burkel	City of Batavia Business Improvement District
Drew Shapiro	Wyoming County Planning and Development
Amy Moore	Office of Representative Tom Reynolds
Esther Leadley	Genesee County Legislature
Mitch Donovan	Victor Chamber of Commerce
Kathy Rayburn	Town of Victor Local Development Corporation
Nichole Mahoney	City of Canandaigua Business Improvement District
Kal Wysokowski	Village of Fairport Industrial Development Agency
Warren Halladay	Wayne County Business Council
Sal Pietropaolo	City of Canandaigua Department of Business & Economic Development
Lloyd Kinnear	Town of Canandaigua Supervisor
Brenda Donohue	Town of Conesus Supervisor
Rob Gladden	Geneva Chamber of Commerce
Andy Harlan	RIT Center for Integrated Manufacturing Studies
Rich Perrin	Genesee Transportation Council
Jody Pollot	Genesee Transportation Council
David Woods	Livingston County Planning Department
Henry Williams	Town of Wheatland
Patti Donoghue	Visit Rochester
Charles Thomas	City of Rochester Department of Planning
Bill McCoy	Metro Justice

Appendix 9 – CEDS Stakeholder Input Meeting Presentation, 2008

2008 Comprehensive
Economic Development
Strategy




GENESEE/FINGER LAKES
Regional Planning Council

Stakeholder Input Session


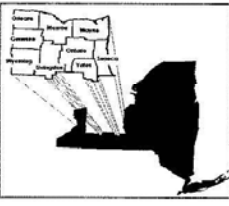
Agenda

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




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
- Coordinate economic development efforts and resources at a regional level
- Identify funding priorities





Role of the Stakeholder

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




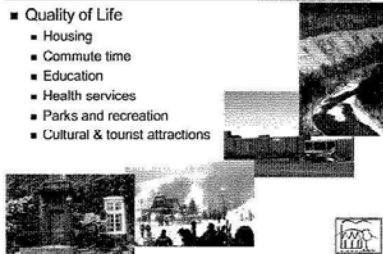
Snapshot of the Region

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



Snapshot of the Region

- Quality of Life
 - Housing
 - Commute time
 - Education
 - Health services
 - Parks and recreation
 - Cultural & tourist attractions



Snapshot of the Region

- 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 2007 CEDS
- What are the regional funding and project priorities?
- What strategies can be employed to reach goals?
- How should we measure how we are doing?



Next Steps

- April 2008: Provide draft for stakeholder feedback
- May 2008: Integrate feedback and comments
- June 2008: Submit report to G/FLRPC Board of Directors for review and approval
- July 2008: Submit to Economic Development Administration




Thank You and Questions

For further information on G/FLRPC and the CEDS

<http://www.gflrpc.org/ProgramAreas/EconomicDevelopment/CEDS.htm>

or contact Daniel Burton at 585-454-0190 x12 or dburton@gflrpc.org



Appendix 10 – CEDS Stakeholder Input Meeting Notes, 2008

Regional strengths and opportunities

Tourism and Promotion

- Strong tourism attractions, this assists small businesses, building tourism, largely local tourists
- Waterfront tourism, connecting downtowns to waterfronts, waterfront opportunities in many municipalities throughout the region
- Wineries spurring tourism- municipalities need to better capitalize on their proximity to wineries
- Changing nature of family vacations- shorter vacations- may result in more local/regional vacations
- Capitalizing on water, natural and recreational resources for those interested in active/outdoor vacations- greenways, trails
- Promoting these water, natural and recreational resources and assets to a regional, national and international audience- promote these assets on a regional-basis, rather than a county-by-county basis- various tourism organizations working together to promote regional sites and destinations
- Statewide study on tourism being performed, demonstrating economic impact of tourism on state- close to \$1 billion impact of tourism on local economy
- Capitalizing on historic and cultural tourism- Erie Canal, proposed Erie Canal aqueduct

Workforce

- FAME in Wayne County, working on manufacturing workforce development

Agriculture

- Involving agricultural businesses in local chambers of commerce
- Agriculture, agri-business, agri-tourism and agricultural spin-offs are a central part of the region, the economic, social and cultural importance of agriculture are key to the region

Transportation and Infrastructure

- Broadband initiative driving businesses development and expansion
- Exploration of passenger rail
- Available railroad infrastructure- upgraded to be able to transport waste, finished goods and products, and raw materials

Land Use

- Stable housing market
- Brownfield redevelopment

Business and Industry

- Expansion of locally owned businesses
- Availability of water resources

Regional issues and challenges

Tourism and Promotion

- Connecting tourist destinations to one another and to downtowns
- Marketing wineries beyond the region, raising awareness of wineries
- Connecting waterfronts to downtowns, integrating waterfronts with downtowns through connections and linkages
- Better recognition of tourism as an industry and as a driver of economic development
- Changing organizational structure of Erie Canal control
- Genesee County Museum and Village could benefit from small hotel or bed and breakfast in the area
- Tourism- retail/tourism initiative in Wyoming County to capture Letchworth visitors- develop farmers' markets/stands, downtown retail- loss of sales tax revenue due to lack of retail services and goods

Workforce

- Workforce development for emerging industries and industries such as high-tech and the wine industry
- Addressing workforce training for high school students who are not planning to attend college- in trades and manufacturing
- Out-migration of young teachers unable to find local teaching jobs and other employment opportunities
- Absence of a skilled workforce to fill positions in manufacturing and agricultural sectors
- Increasing apprenticeship opportunities in manufacturing, agriculture, and other sectors
- Lack of employment opportunities for recent college graduates in their fields- many graduates wish to stay in the area, but are unable to due to lack of employment opportunities
- Workforce- need for skilled trades, shortage of skilled trades workers
- Better need to steer students to vocational training
- Bring businesses to the table to discuss workforce shortage issues- better recognition of the need to train workers
- Life sciences and advanced manufacturing employees are needed
- Internship program to bring potential employees into a training program- starting students at a young age in an internship program
- Connections between different workforce development actors are there
- Health care- developing skills for health care industry managers, lack of health care industry educators

Agriculture

- Increased awareness of agricultural employment opportunities
- Aging farm owners selling farms
- Maintaining that viable agricultural lands remain in agricultural production

- Addressing development pressures on agricultural lands
- Workforce development issues surrounding agriculture- aging farm owners, few younger workers looking to enter the agricultural field
- Region-wide land banking approach to maintain agricultural lands
- Preserving economic viability of agriculture
- Changes occurring in agricultural labor force, increasing dependence on immigrant labor, many farmers in the region could not operate in the absence of immigrant labor
- Agricultural workforce development- raising awareness of the possibilities and opportunities of agricultural employment, workforce development agencies working with agricultural sector to determine their needs
- Need for advanced agricultural workers to work in growing agricultural production sector
- Developing program to assist farmers with food safety issues to ensure that they can continue to sell their products to market
- Better recognition of the relationship between agriculture and economic development
- Raising awareness of other markets for agriculture- agri-tourism
- Finding a balance between farmland preservation and job and residential development
- Capture growing agri-tourism market, counties should work together to develop an agri-tourism tour- developing family-oriented agricultural tourism

Transportation and Infrastructure

- Local businesses are looking to municipalities for infrastructure upgrades, challenges involved in upgrades are cost, various regulations
- Growth of wineries limited by water and sewer line capacity
- Other businesses limited in their ability to grow by aging infrastructure and limited capacity
- Cost of electricity is a problem for businesses, larger businesses sometimes seek tax exemptions from municipalities to off-set high electric costs
- Businesses asking for increases in electrical capacity have been asked by utilities to pay for entire system upgrades
- Truck traffic through village and city downtowns
- Energy costs in the region can be prohibitive for manufacturers
- Infrastructure- an unmet need is telecommunications (broadband), water and sewer capacity are adequate for demand, aging infrastructure can be problematic leading to reliability problems
- Lack of resources for transportation upgrades and maintenance limits the upgrades and maintenance that can happen
- Public transportation improvements should be considered to better correlate with employment locations and times, especially in rural areas- improved intra- and inter-county public transportation connections

- Rail infrastructure- possibility of inter-city high-speed rail, though there are few resources to develop new rail lines
- Addressing transportation issues- some areas have a lack of and access to major transportation corridors- transport of goods can be problematic for businesses and inability to easily transport goods to negatively affect the ability to attract businesses
- Improved routing and efficiency for public bus systems, convenience to public transportation for an aging population
- Bicycle, recreational trails
- Water and sewer- little public water and sewer in certain rural areas, this will limit sprawl but also can limit growth
- All infrastructure is critical to business park development- water, sewer, utilities, broadband
- Businesses need both water and sewer, residential can happen with only water
- Telecommunications- siting of cell tower issues, need to expand broadband availability and access
- Energy- wind farm development is growing, energy supply is adequate, but cost can be prohibitive for business attraction

Land Use

- Limiting growth, new development
- Older demographics seeking compact, walkable environments
- Development pressure on lakefront property adversely affecting wineries and tourism (lakefront access)
- Sprawl and greenfield development vs. in-fill development
- Sprawl, leading to vacancies in both cities and inner-ring suburbs
- Better promotion of the advantages of walking to retail and employment destinations
- Taking advantage of existing more densely developed areas to encourage re-investment, redevelopment in these areas- incentives to spur investment in areas with existing infrastructure and capacity
- Brownfield redevelopment- logistics of brownfield redevelopment can be difficult and can take a long time to come to fruition
- Increased public awareness of walking options for shorter trips
- Need to address growth in at-home care, aging at-home will also lead to housing issues- aging in-one-place- independent living, nursing home- all in the same community
- Addressing jobs-housing disconnect
- Brownfields- Wyoming County/Perry has a brownfield project moving forward, as well as another site in Warsaw- two sites in Genesee County, potential site in downtown Batavia
- Convention center that can accommodate a large group- 500+

- Developing an entertainment/restaurant district in downtown Batavia- event and entertainment oriented- potential of arts to generate revenue and drive economic development
- Village/city downtowns and main streets- Batavia looking to develop a downtown hotel with conference center

Business and Industry

- Need for financial assistance for small businesses- training opportunities
- Difficulty in attracting national retailers to new developments
- Keeping existing industries staffed- retail, manufacturing
- Taking advantage of green building
- Addressing spending occurring outside of village downtowns- keeping spending local
- Better understanding of customers by local businesses
- How to promote economic development in areas of the region that aren't largely urbanized, but have open space, water, natural resources
- Changes in Empire Zone designations for local businesses
- Loss of manufacturing jobs, increase in service sector jobs
- Disconnect between national and local policy regarding manufacturing
- Abundance of fresh water supply in the region- how to capitalize on this asset?
- Industries that are water intensive may be attracted to the region due to this fresh water supply
- Shovel-ready sites- Genesee County is well-stocked with sites, Wyoming County is developing infrastructure in Empire Zone sites to spur spec buildings
- Microenterprise loan through Alliance for Business Growth to assist village main streets in Wyoming County with downtown revitalization
- Batavia BID looking to develop a business development matching grant program to assist businesses with interior and equipment upgrades, similar to the existing façade improvement program
- Costs to businesses of starting, growing and expanding in the region can be prohibitive

Regional solutions and priorities

Tourism and Promotion

- Addressing the ability of visitors to region to travel throughout the region, or even within cities, without a vehicle
- Developing a regional theme, regional brand and marketing this brand
- Promoting the housing stock, entertainment and recreational opportunities, unique commercial buildings of the region as a whole
- Loss of 25-34 age cohort in the region and inability to attract this same cohort to the region- better marketing of the region to capture a returning population

Workforce

- Work with BOCES to develop and implement skills training programs- trades, manufacturing, etc.
- Improved public relations to promote the benefits of working in manufacturing trades
- Young professional organizations in areas outside of greater Rochester- develop branches of existing organizations
- Better coordination between regional community colleges- develop connections between community colleges and the businesses and industries that are in proximity of those colleges to develop curriculums to fill jobs in those industries
- Better connection between employers and job seekers- better communication of the job opportunities that exist in the region and promotion of the skills needed for the jobs that are anticipated to be in demand in the region
- Creating a sense of opportunity in the region, that possibilities exist for job growth, job opportunities
- Increasing connections of high-school and college-age students to internship and mentorship opportunities with area businesses
- Increasing opportunities for entrepreneurship training
- Business and industry shadowing program for non-college bound high school students to expose them to possible careers
- The quality of life in the region- cultural, recreational, educational- is high, but lack of job opportunities prevent the region from growing

Agriculture

- Aging farm owners selling operational farm businesses to new farmers

Transportation and Infrastructure

- Increased regional utility capacity- electric, cable
- Increased regional broadband capacity
- Addressing costs for infrastructure maintenance and upgrades

Land Use

- Regional land-use strategy to address land preservation, development and redevelopment

Governance

- Increased collaboration and communication between municipalities working on similar projects
- Increased recognition of the benefit of improved conditions of municipalities on the region as a whole
- Increased collaboration between BIDs, chambers, LDCs, and municipalities
- Assisting region in addressing economic challenges in a coordinated and unified way, combining resources to best address these challenges
- Taking a statewide approach to addressing the problems facing upstate NY

- Increased collaboration on service provision and dissolution of towns and villages
- Increased awareness of funding opportunities that exist and assistance in creating new program and agencies, for counties
- One-stop center that makes available/known all funding opportunities- local, county, state, regional, federal, private
- Regional economic incorporation