
Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy



2008

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy

2008



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

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's (CEDS) (projects and priorities).

NOW, THEREFORE, BE IT RESOLVED

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

June 12, 2008
Date


Chair

TABLE OF CONTENTS

CHAPTER 1 – GENESEE-FINGER LAKES ECONOMIC DEVELOPMENT DISTRICT	1
1.1 INTRODUCTION	1
1.2 ECONOMIC DEVELOPMENT ADMINISTRATION	1
CHAPTER 2 – GENESEE/FINGER LAKES REGIONAL PLANNING COUNCIL: ORGANIZATIONAL OVERVIEW.....	3
2.1 LEGAL STRUCTURE.....	3
2.2 PARTICIPATING GOVERNMENTS.....	3
2.3 ORGANIZATION OF G/FLRPC.....	3
2.3.a Comprehensive Economic Development Strategy Committee	5
2.3.b Executive Committee	5
2.3.c Economic Development Advisory Committee.....	6
2.3.d Rochester/Finger Lakes Regional Development Corporation.....	7
2.3.e Planning Coordination Committee.....	8
2.3.f Staff	9
2.3.g G/FLRPC Economic Development and Related Programs and Activities.....	10
2.3.g.i. Economic Development Planning	10
2.3.g.ii Western Erie Canal Main Street Program	10
2.3.g.iii Regional, Local and Water Resources Planning	10
2.3.g.iii.a Flood and Hazard Mitigation Planning	11
2.3.g.iii.b Main Street/Community Centers.....	11
2.3.g.iii.c Municipal Planning	11
2.3.g.iii.d Water Resources Planning	11
2.3.g.iv Data, Technology and Resource Center	12
2.3.g.iv.a Socio-Economic and Demographic Data.....	12
CHAPTER 3 – OVERVIEW OF THE GENESEE-FINGER LAKES REGION.....	13
3.1 GEOGRAPHY	13
3.2 HISTORY OF THE REGION	15
3.3 SOCIO-ECONOMIC DEMOGRAPHIC INFORMATION.....	16
3.3.a Population Trends	16
3.3.b Population Growth (1980-2006)	16
3.3.c Age.....	17
3.3.d Educational Attainment.....	18
3.3.e Per Capita Personal Income	19
3.3.f Poverty.....	19
3.3.g Housing.....	20
3.4 ECONOMIC, WORKFORCE AND TRANSPORTATION PROFILE	21
3.4.a Data Sources and Constraints.....	21
3.4.b Employment.....	22
3.4.c Establishments.....	25
3.4.d Average Annual Wage	26
3.4.e Unemployment.....	28
3.4.f Agricultural Economics	28
3.4.g Economic Analysis Tools	29
3.4.h Transportation Access.....	30
CHAPTER 4 - CURRENT ECONOMIC DEVELOPMENT AND RELATED ASSETS, PROGRAMS AND ACTIVITIES	33
4.1 REGIONAL REVOLVING LOAN FUND.....	33
4.2 NEW YORK STATE ECONOMIC DEVELOPMENT ACTIVITIES	33
4.2.a Empire Zones	34

4.2. b Centers of Excellence.....	34
4.2.c Build Now New York Sites.....	34
4.2.d New York State Energy Smart Program	35
4.3 INDUSTRY CLUSTERS AND COMPETENCIES	36
4.4 REGIONAL WORKFORCE DEVELOPMENT	36
4.4.a Finger Lakes Wired.....	36
4.4.a.i Finger Lakes Wired Funded Initiatives	37
4.4.a.ii Finger Lakes Wired Related Activities	42
4.4.b Genesee/Livingston/Orleans/Wyoming Workforce Investment Board.....	43
4.4.c Finger Lakes Workforce Investment Board	43
4.4.d Rochester Works.....	44
4.5 BROWNFIELD REDEVELOPMENT	44
4.6 FINGERS LAKES LAND USE PROJECT	45
4.7 INFRASTRUCTURE	46
4.7.a Transportation	46
4.7.a.i The Long Range Transportation Plan.....	47
4.7.a.ii The Unified Planning Work Program.....	47
4.7.a.iii Regional Goods Movements Strategy.....	47
4.7.a.iv The Transportation Improvement Program (TIP).....	47
4.7.b Telecommunications	48
4.7.c Water	48
4.7.d Wastewater.....	49
4.7.d.i Monroe County Pure Waters Program: A Model Worthy of National Merit.....	49
4.7.d.ii Outside of Monroe County Pure Waters Program	50
4.7.e Energy	51
4.7.e.i Traditional Energy.....	51
4.7.e.ii Alternative Energy	51
4.8 WATER PROTECTION AND RESTORATION	52
4.8.a Rochester Embayment Remedial Action Plan	52
4.8.b Stormwater Phase II Regulation Implementation	53
4.8.c Regional Watershed Planning	53
4.8.d Other Water Resource Initiatives	53
4.8.d.i Genesee River Action Strategy	53
4.8.d.ii Honeoye Lake Watershed Management Plan	54
4.8.d.iii Canandaigua Lake Watershed Land Use Law Project	54
4.8.d.iv Keuka Lake Looking Ahead – An Intermunicipal Land Use Action Plan	54
4.8.d.v Regional Blueway Analysis	54
4.8.d.vi Black and Oatka Creek Watershed Management Plans	55
4.9 MULTI-JURISDICTIONAL ALL HAZARD MITIGATION PLANNING	55
4.10 REGIONAL MARKETING AND RESEARCH	56
4.10.a Greater Rochester Enterprise.....	56
4.10.b Center for Integrated Manufacturing Studies.....	57
4.10.b.i Roadmap for the Revitalization of Upstate New York Manufacturing.....	57
4.10.b.ii Roadmap Implementation Activities.....	58
4.10.b.ii.a The Knowledge Clearinghouse.....	59
4.10.b.ii.b The Innovation Test Bed	59
4.10.b.ii.c Cluster Collaboration Support	59
4.10.b.ii.d Technical Assistance	59
4.11 NEW YORK STATE CANAL COMMISSION	60
4.11.a Western Erie Canal National Heritage Corridor.....	60
4.12 CORNELL AGRICULTURE AND FOOD TECHNOLOGY PARK	61
4.13 VILLAGE MAIN STREETS	61
CHAPTER 5 - DEVELOPMENT ACTIONS, EFFORTS AND PRIORITIES.....	63
5.1 GENESEE-FINGER LAKES REGION.....	63
5.2 GENESEE COUNTY	65

5.3 LIVINGSTON COUNTY	69
5.4 MONROE COUNTY	73
5.5 CITY OF ROCHESTER.....	76
5.6 ONTARIO COUNTY	79
5.7 ORLEANS COUNTY.....	83
5.8 SENECA COUNTY	88
5.9 WAYNE COUNTY	92
5.10 WYOMING COUNTY	96
5.11 YATES COUNTY	100
CHAPTER 6 - 2008 GOALS, OBJECTIVES, STRATEGIES AND MEASURES.....	104
6.1 STAKEHOLDER INPUT SESSIONS	104
6.2 GOALS, OBJECTIVES, STRATEGIES AND MEASURES.....	104
CHAPTER 7 – 2008 PLAN OF ACTION.....	112
7.1 COMMUNITY AND BUSINESS DEVELOPMENT.....	112
7.2 PROFESSIONAL SUPPORT	115
7.3 STATE DATA CENTER AFFILIATE PROGRAM.....	116
APPENDICES	118
APPENDIX 1 - CEDS STAKEHOLDER INPUT SESSION INVITATION.....	118
APPENDIX 2 - CEDS SUMMARY SHEET	119
APPENDIX 3 - MAJOR INDUSTRY SECTORS PRESENT IN THE G-FL REGION	121
APPENDIX 4 - ECONOMIC INDICATORS FOR THE G-FL REGION BY INDUSTRY SUBSECTOR (2006)	124
APPENDIX 5 - ECONOMIC INDICATORS FOR THE G-FL REGION BY INDUSTRY SUBSECTOR (2000)	126
APPENDIX 6 - CHANGE IN ECONOMIC INDICATORS FOR THE G-FL REGION BY INDUSTRY (2000-2006)..	128
APPENDIX 7 - ASSUMPTIONS IN LOCATION QUOTIENT APPROACH	129
APPENDIX 8 - STAKEHOLDER INPUT SESSION ATTENDEES, 2008.....	130
APPENDIX 9 - CEDS STAKEHOLDER INPUT MEETING PRESENTATION, 2008.....	131
APPENDIX 10 - CEDS STAKEHOLDER INPUT MEETING NOTES, 2008.....	133

LIST OF TABLES

TABLE 1 - GENESEE/FINGER LAKES REGIONAL PLANNING COUNCIL.....	4
TABLE 2 - EXECUTIVE COMMITTEE	6
TABLE 3 - ECONOMIC DEVELOPMENT ADVISORY COMMITTEE (EDAC).....	7
TABLE 4 - ROCHESTER/FINGER LAKES REGIONAL DEVELOPMENT CORPORATION (RDC)	8
TABLE 5 - PLANNING COORDINATION COMMITTEE (PCC)	9
TABLE 6 - DISTRICT STAFF.....	10
TABLE 7 - POPULATION FOR THE G-FL REGION (1960-2006).....	16
TABLE 8 - POPULATION GROWTH FOR THE G-FL REGION, NYS AND US (1980-2006)	17
TABLE 9 - AGE DISTRIBUTION FOR THE G-FL REGION, NYS AND US IN 2004.....	18
TABLE 10 - EDUCATIONAL ATTAINMENT RATES FOR THE G-FL REGION, UPSTATE NY, NYS AND US	18
TABLE 11 - PER CAPITA INCOME FOR THE G-FL REGION, NYS AND US	19
TABLE 12 - POVERTY STATUS FOR THE G-FL REGION, NYS AND US.....	20
TABLE 13 - MEDIAN HOME VALUES AND MEDIAN GROSS RENTS IN 2000	21
TABLE 14 - EMPLOYMENT IN THE G-FL REGION BY MAJOR SECTOR (2006).....	23
TABLE 15 - CHANGE IN EMPLOYMENT BY MAJOR SECTOR IN THE G-FL REGION (2000-2006).....	24
TABLE 16 - NUMBER OF FIRMS IN THE G-FL REGION BY MAJOR SECTOR (2006)	25
TABLE 17 - AVERAGE ANNUAL WAGE FOR THE G-FL REGION (2006).....	27
TABLE 18 - UNEMPLOYMENT RATE FOR THE G-FL REGION, NYS AND US (2000-2006)	28
TABLE 19 - AGRICULTURAL ECONOMIC STATISTICS FOR THE G-FL REGION (2006).....	29
TABLE 20 - TOP 15 INDUSTRIES BY LOCATION QUOTIENT IN THE G-FL REGION (2006)	30
TABLE 21 - GENESEE-FINGER LAKES REGION QUALIFIED BUILD-NOW NY SITES	35
TABLE 22 - GENESEE-FINGER LAKES REGION PRIORITIES	65
TABLE 23 - GENESEE COUNTY/ BATAVIA MICROPOLITAN PRIORITIES.....	69
TABLE 24 - LIVINGSTON COUNTY PRIORITIES	73
TABLE 25 - MONROE COUNTY PRIORITIES	75
TABLE 26 - CITY OF ROCHESTER PRIORITIES	79
TABLE 27 - ONTARIO COUNTY PRIORITIES	83
TABLE 28 - ORLEANS COUNTY PRIORITIES	88
TABLE 29 - SENECA COUNTY PRIORITIES	92
TABLE 30 - WAYNE COUNTY PRIORITIES	96
TABLE 31 - WYOMING COUNTY PRIORITIES	99
TABLE 32 - YATES COUNTY PRIORITIES	103
TABLE A-3 - MAJOR INDUSTRY SECTORS, NAICS CODE AND INDUSTRY SUBSECTORS	121
TABLE A-4 - ESTABLISHMENTS, EMPLOYMENT, AVERAGE WAGE, LOCATION QUOTIENTS.....	124
TABLE A-5 - ECONOMIC STATISTICS FOR THE G-FL REGION (2000).....	126
TABLE A-6 - CHANGE IN ECONOMIC STATISTICS FOR THE G-FL REGION (2000-2006).....	128
TABLE A-8 - CEDS STAKEHOLDER INPUT SESSIONS, ATTENDEE LIST.....	130

Chapter 1 – Genesee-Finger Lakes Economic Development District

1.1 Introduction

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

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

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

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

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

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

1.2 Economic Development Administration

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

competitiveness, preparing American regions for growth and success in the worldwide economy."

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

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

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

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

2.1 Legal Structure

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

2.2 Participating Governments

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

2.3 Organization of G/FLRPC

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

Several committees currently serve G/FLRPC. They are the general Council, the Executive Committee, the Economic Development Advisory Committee (EDAC) 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 Comprehensive Economic Development Strategy

Table 1 - Genesee/Finger Lakes Regional Planning Council				
Member	Affiliation	Status	Race	Gender
Mary Pat Hancock	Genesee County	Voting	White	Female
Steve Hyde	Genesee County	Voting	White	Male
Esther Leadley (A)	Genesee County	Voting	White	Female
Charles Zambito	Genesee County	Voting	White	Male
<i>James Duval</i>	<i>Genesee County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Brenda Donohue (A)	Livingston County	Voting	White	Female
William Wadsworth	Livingston County	Voting	White	Male
James Merrick	Livingston County	Voting	White	Male
Robert Yull	Livingston County	Voting	White	Male
<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>
<i>Angela Ellis</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Jeffrey Adair	Monroe County	Voting	White	Male
Maggie Brooks	Monroe County	Voting	White	Female
Linda Dobson	Monroe County	Voting	White	Female
Kal Wysokowski	Monroe County	Voting	White	Female
Wayne Zyra	Monroe County	Voting	White	Male
<i>Paul Johnson</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
Gladys Santiago	City of Rochester	Voting	White	Female
Charles Thomas (A)	City of Rochester	Voting	White	Male
<i>Carlos Carballada</i>	<i>City of Rochester</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Karen Altman (A)</i>	<i>City of Rochester</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Leslie Bamann	Ontario County	Voting	White	Female
Theodore Fafinski	Ontario County	Voting	White	Male
Robert LaRocca (A)	Ontario County	Voting	White	Male
Lloyd Kinnear	Ontario County	Voting	White	Male
<i>Kristen Hughes</i>	<i>Ontario County</i>	<i>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
Kenneth Rush	Orleans County	Voting	White	Male
Gary Kent (A)	Orleans County	Voting	White	Male
Wayne Hale (A)	Orleans County	Voting	White	Male
<i>Jim Whipple</i>	<i>Orleans County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Suzanne Sinclair	Seneca County	Voting	White	Female
Chuck Lafler	Seneca County	Voting	White	Male
William Bordeau (A)	Seneca County	Voting	White	Male
James Fabino	Wayne County	Voting	White	Male
James Hoffman	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
James Fleischman (A)	Wyoming County	Voting	White	Male
Joe Gozelski (A)	Wyoming County	Voting	White	Male
<i>Drew Shapiro</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Michael Hefika</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Jerry Davis	Wyoming County	Voting	White	Male
Donald House (A)	Yates County	Voting	White	Male
Robert Multer	Yates County	Voting	White	Male
Nancy Taylor	Yates County	Voting	White	Female
<i>Steve Griffin</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Shawna Armitage</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</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
<i>Richard Perrin</i>	<i>Genesee Transportation Council</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>

(A) Alternate

2.3.a Comprehensive Economic Development Strategy Committee

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

Each of the CEDS Review Committee members 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 Regional Planning Council/ CEDS Review Committee meeting. A copy of the invitation that was distributed to the CEDS Review Committee members can be found in Appendix 1. The CEDS Review Committee and Subcommittee were well represented at the CEDS Stakeholder Input sessions. Additionally, the draft CEDS was on the agenda and discussed at the April 25, 2008 EDAC/RDC meeting. To learn more about those meetings and the process used, please refer to Section 6.1 of this document.

The draft CEDS was made available for public review and comments in late-April. A final version of the 2008 CEDS was adopted at the June G/FLRPC Governing Board meeting; the minutes from this meeting can be found in Appendix 3 of this document.

2.3.b Executive Committee

The Executive Committee is responsible for the day-to-day management and policy decisions of the organization. The Executive Committee typically meets 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	White	Female
Jeffrey Adair, Treasurer	777 Quaker Road Scottsville, NY 14546	Legislator, Monroe County Legislature	White	Male
Wayne Zyra	39 West Main Street Rochester, NY 14614	President, Monroe County Legislature	White	Male
Leslie Bamann	85 East Main Street Victor, NY 14564	Supervisor, Town of Victor	White	Female
Wayne Hale	14016 Route 31 West Albion, NY 14411	Director, Orleans County Planning & Development	White	Male
Suzanne Sinclair	1 DiPronio Drive Waterloo, NY 13165	County Manager, Seneca County	White	Female
James Hoffman, Chair	26 Church Street Lyons, NY 14489	Chairman, Wayne County Board of Supervisors, Supervisor, Town of Williamson	White	Male
Jerry Davis, Vice Chair	7414 Court Road Pavilion, NY 14525	Supervisor, Town of Covington	White	Male
Donald House	Yates County Legislature Penn Yan, NY 14527	Legislator, Yates County Legislature	White	Male
Wilfred Brooks	98 South Pearl Street Oakfield, NY 14125	At-Large	Black	Male
Steven Griffin	Yates County IDA 1 Keuka Business Park Penn Yan, NY 14527	Chair, G/FLRPC Economic Development Advisory Committee	White	Male
Paul Johnson	Monroe County Planning & Development 50 West Main Street Rochester, NY 14614	Chair, G/FLRPC Planning Coordination 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 Economic 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 Canandaigua, NY 14424	Ontario County Office of Economic Development	White	Male
Jim Whipple Director of Operations	111 West Ave. Albion, NY 14411	Orleans Economic Development Agency	White	Male
Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Industrial Development Agency	-	-
Margaret Churchill, Executive Director	16 William Street Lyons, NY 14489	Wayne Economic Development	White	Female
Michael Heftka, IDA Director	6470 Route 20A Suite 4 Perry, NY 14530	Wyoming County Industrial Development Agency	White	Male
Steven Griffin, Executive Director, Chair	1 Keuka Business Park Penn Yan, NY 14527	Yates County Industrial Development Agency	White	Male
Kevin Hurley, Acting Regional Director - Finger Lakes Regional Office	400 Andrews Street, Suite 710 Rochester, NY 14604	Empire State Development	White	Male

2.3.d Rochester/Finger Lakes Regional Development Corporation

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

Table 4 – Rochester/Finger Lakes Regional Development Corporation (RDC)				
Member	Address	Affiliation	Race	Gender
Brian R. Anderson, Senior Economic Development Representative	300 Erie Boulevard West Syracuse, NY 13202	Niagara Mohawk	White	Male
Richard Boerman, Loan Management	6712 Ann Lee Drive North Rose, NY 14516	Regional Development Corporation	White	Male
Dana Brunett, President	400 East Avenue Rochester, NY 14607	The Enterprise Center, Rural Opportunities, Inc.	White	Male
Clyde Forbes, Director of Economic Development	89 East Avenue Rochester, NY 14649	Rochester Gas & Electric Corporation	Black	Male
Jim Armstrong, Assistant Director	20 Ontario Street Canandaigua, NY 14424	Ontario County Office of Economic Development	White	Male
Julie Marshall, Deputy Director	6 Court Street Room 306 Geneseo, NY 14454	Livingston County Economic Development Group	White	Female
Regional Administrator	130 West Main Street Room 200 Rochester, NY 14614	NYS Department of Labor	-	-
Richard Perrin, Executive Director	50 W. Main Street., Suite 8112 Rochester, NY 14614	Genesee Transportation Council	White	Male
Jim Senall, 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
Paul Johnson, Chair, Planning Manager	50 West Main Street, Suite 8100 Rochester, NY 14614	Monroe County Planning & Development	White	Male
Charles Thomas, Director of Planning	City Hall, Room 010A 30 Church Street Rochester, NY 14614	City of Rochester Department of Community Development	White	Male
Kris Hughes, Director	20 Ontario Street Canandaigua, NY 14424	Ontario County Division of Planning and Research	White	Male
Wayne Hale, Director	14016 Route 31 West Albion, NY 14411	County of Orleans Department of Planning and Development	White	Male
Harriet Haynes, Planner	1 DiPronio Drive Waterloo, NY 13165	Seneca County Planning & Development	White	Female
Sharon Lilla, Director	9 Pearl Street Lyons, NY 14489	Wayne County Planning Department	White	Female
Drew Shapiro, Director	6470 State Route 20A, Suite 4 Perry, NY 14530	Wyoming County Department of Planning & Development	White	Male
Shawna Armitage, 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
Rudeen Armstrong	Business Manager	Black	Female
Joseph Bovenzi	Senior Planner	White	Male
Jayne Breschard	Senior Planner	White	Female
Daniel Burton	Senior Planner – Economic Development	White	Male
Thomas Kicior	Planner	White	Male
Brian Slack	Senior Planner	White	Male
Chris Tortora	Planner - GIS & Remote Sensing, Data, Technology & Resource Center	White	Male
David Zorn	Executive Director	White	Male

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

2.3.g.i. Economic Development Planning

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

2.3.g.ii Western Erie Canal Main Street Program

The Western Erie Canal Main Street Program seeks to revitalize historic business centers along the heritage corridor. The program provides a wide range of technical assistance services to the sixteen villages and small cities that make up the 136-mile section of the canal in Western New York. These municipalities have been challenged by the economic and physical decline of their main streets. One local community in three counties will be selected to receive financial support for intensive planning work for the revitalization of its main street. The Main Street Advisory Board will assist in the application and selection process of the three communities as Main Street programs.

The Western Erie Canal Corridor is part of the Erie Canalway National Heritage Corridor and the New York State Heritage Area System. The program implements the Western Erie Canal Heritage Corridor Management Plan, which was adopted by New York State 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 Corridor.

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, 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 regulations and controls and 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 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 implementing 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, needs assessments, data/database development, data conversion, digitalization, demographic analysis, project planning and management and application development. Remote sensing services include the classification and analysis of satellite imagery and the integration of digital ortho-imagery and aerial photography.

2.3.g.iv.a 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

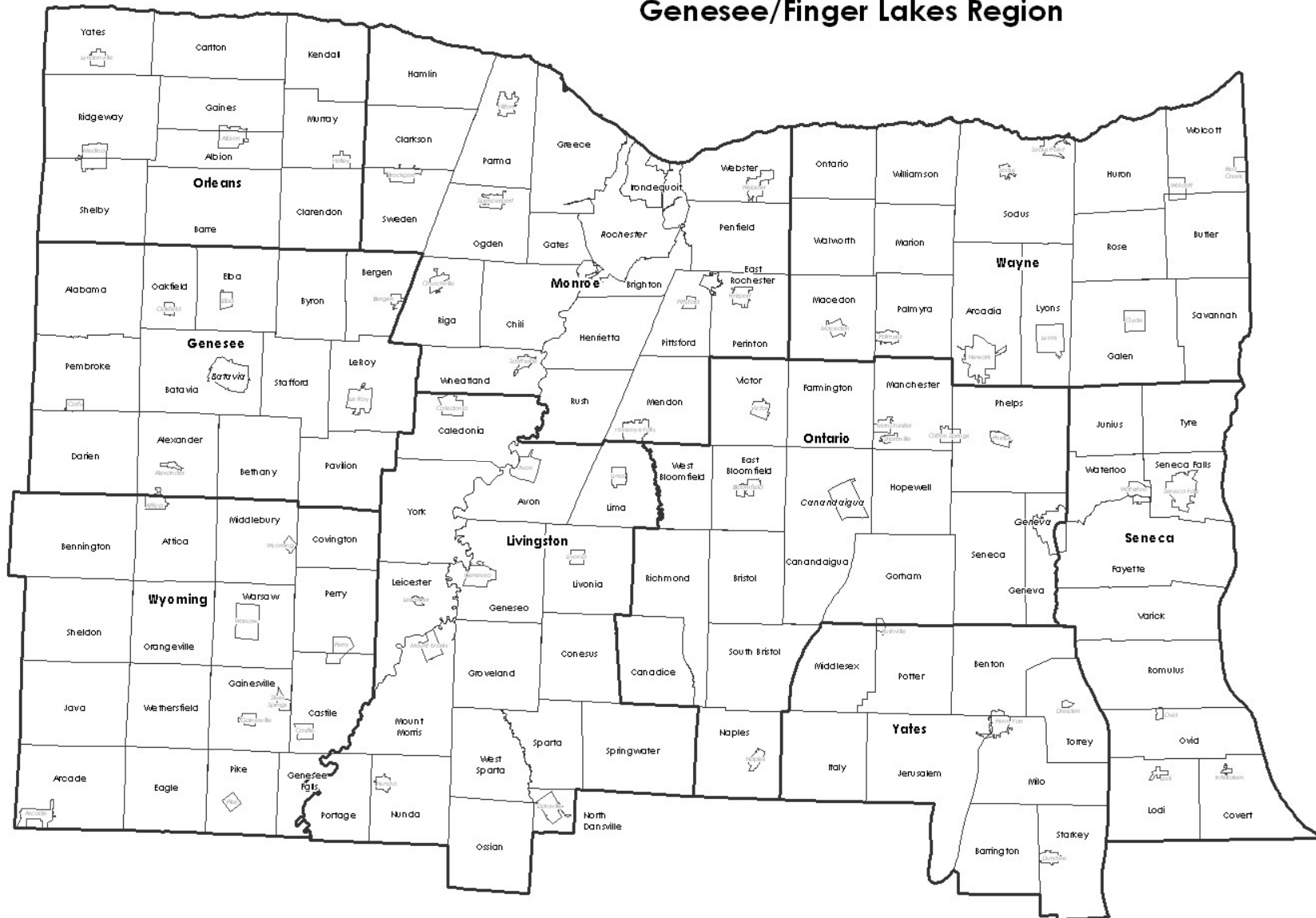
Chapter 3 provides an overview of historic, demographic, socioeconomic, workforce, transportation access and economic conditions of the District using data from federal, state and regional sources. An overview of socio-demographic information for each county and the District will be compared to upstate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

3.1 Geography

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

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

Genesee/Finger Lakes Region



0 10 20 30 Miles



3.2 History of the Region

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

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

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 (1950-2006)*, the most populous counties, after Monroe, have been Ontario and Wayne.

Table 7 - Population for the G-FL Region (1960-2006)

	1960	1970	1980	1990	2000	2006 (est.)
Genesee	54,000	58,700	59,400	60,100	60,400	58,830
Livingston	44,100	54,000	57,000	62,400	64,300	64,173
Monroe	586,400	711,900	702,200	714,000	735,300	730,807
Ontario	68,100	78,800	88,900	95,100	100,200	104,353
Orleans	34,200	37,300	38,500	41,800	44,200	43,213
Seneca	32,000	35,100	33,700	33,700	33,300	34,724
Wayne	68,000	79,400	84,600	89,100	93,800	92,889
Wyoming	34,800	37,700	39,900	42,500	43,400	42,613
Yates	18,600	19,800	21,500	22,800	24,600	24,732
G-FL Region	940,200	1,112,700	1,125,700	1,161,500	1,199,500	1,196,334

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 2006, all counties experienced some growth with the exception of Seneca County, which has experienced population decline since 1970, but has shown some population growth from 2000 to the present.

3.3.b Population Growth (1980-2006)

In order to understand recent population shifts and dynamics, an analysis of population growth from 1980-2006 was compiled in Table 8, *Population Growth for the G-FL Region, NYS and the US (1980-2006)*.

Table 8 - Population Growth for the G-FL Region, NYS and US (1980-2006)

	1980	1990	2006 (est.)	Change (1980-2006)	
				By People	By Percent
Genesee	59,400	60,060	58,830	-570	-1
Livingston	57,000	62,372	64,173	7,173	11
Monroe	702,200	713,968	730,807	28,607	4
City of Rochester	241,741	231,636	208,123	-33,618	-16
Ontario	88,900	95,101	104,353	15,453	15
Orleans	38,500	41,846	43,213	4,713	11
Seneca	33,700	33,683	34,724	1,024	3
Wayne	84,600	89,123	92,889	8,289	9
Wyoming	39,900	42,507	42,613	2,713	6
Yates	21,500	22,810	24,732	3,232	13
G-FL Region	1,125,700	1,161,470	1,196,334	70,634	6
NYS	17,558,165	17,990,778	19,306,183	1,748,018	9
US	226,545,805	248,718,297	299,398,484	72,852,679	24

Source: US Census Bureau

During that twenty-six year time period, the United States experienced explosive growth with a growth rate of 24%. 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 9%. The G-FL region grew at a rate of 6% during the 1980-2006 time period. This is slightly less than state growth rate, but far less than national growth.

Six counties in the G-FL region, Orleans, Yates, Livingston, Ontario, Wayne and Wyoming, had a growth rate greater than the state. The only county to experience a negative growth rate was Genesee County with a loss of 570 people, or a -1% decrease in population.

3.3.c Age

There are two demographic shifts about which many in upstate New York and the northeastern region are concerned. They are the aging population and the out migration of the 25-44 age cohort. The percentage of people over the age of 65 in the region is 14%, compared to 13% in the state and 12% in the nation, as illustrated by Table 9, *Age Distribution for the G-FL Region, NYS and the US in 2004*, 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 decrease in the percentage of people aged 25-44 is a cause for concern in the region. This age cohort is an indicator of the number of people

Table 9 - Age Distribution for the G-FL Region, NYS and US in 2004(estimated)

	Under 18	18 to 24	25 to 44	45 to 64	65 and over
Genesee	24%	10%	25%	26%	15%
Livingston	21%	15%	27%	25%	12%
Monroe	24%	10%	28%	25%	13%
Ontario	23%	10%	26%	27%	14%
Orleans	24%	11%	27%	25%	13%
Seneca	22%	10%	28%	25%	15%
Wayne	25%	9%	26%	27%	13%
Wyoming	21%	10%	31%	26%	12%
Yates	25%	11%	23%	26%	15%
G-FL Region	23%	11%	27%	26%	14%
NYS	24%	10%	28%	25%	13%
USA	25%	10%	28%	25%	12%

Source: US Census Bureau

setting up homes in the 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 24-44 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 percent)

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

Source: US Census Bureau

Additionally, 26% of people in the G-FL region have a Bachelor's degree or higher. This is higher than upstate 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 Associates 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 group². The per capita income in the G-FL region increased by \$2,432 in constant dollars, or 9%, between 1995 and 2005, 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 (1995-2005)	
	1995*	2005	By Dollars	By Percent
Genesee	25,454	27,810	2,356	8
Livingston	24,251	26,300	2,049	8
Monroe	32,715	36,062	3,347	9
Ontario	29,079	32,270	3,191	10
Orleans	22,351	23,637	1,286	5
Seneca	24,664	26,003	1,339	5
Wayne	26,905	28,263	1,358	5
Wyoming	20,695	25,050	4,355	17
Yates	20,934	23,772	2,838	12
G-FL Region	25,253	27,685	2,432	9
New York	34,705	39,967	5,262	13
US	29,571	34,685	5,114	15

Source: New York State Data Center

* 1995 dollars are adjusted for inflation and are expressed in 2005 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 1995 to 2005 than the state and nation.

3.3.f Poverty

Information on the percentage of people living in poverty, in conjunction with the previous data regarding per capita income, provides insight into equity issues in the region. The poverty indicators show some positive attributes about the G-FL region, although the percentage of people living in poverty has increased in the 1995-2005 time period, as illustrated in Table 12, *Poverty Status for the G-FL Region, NYS and the US*.

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

The percent of people living in poverty in the G-FL region in 2005 is less than New York State and the nation. All counties, however, with the exception of Genesee, Ontario, Orleans, Wayne and Yates, experienced an increase in the percent of people living in poverty from 1995 to 2005, while there was a state and national decrease.

During the 1995-2005 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 and Seneca, 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

	Population living in poverty		Population under 18 living in poverty	
	1995	2005	1995	2005
Genesee	9%	9%	13%	12%
Livingston	10%	13%	13%	13%
Monroe	12%	13%	21%	18%
Ontario	9%	7%	13%	10%
Orleans	12%	12%	17%	19%
Seneca	11%	12%	17%	18%
Wayne	9%	9%	13%	13%
Wyoming	11%	10%	15%	14%
Yates	15%	13%	23%	21%
G-FL Region	11%	11%	16%	15%
New York	16%	14%	25%	20%
US	14%	13%	21%	19%

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 and national averages.

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

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

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

Source: US Census Bureau

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

3.4 Economic, Workforce and Transportation Profile

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

3.4.a Data Sources and Constraints

The following information for the region will be presented below: employment by major sector, number of establishments, average annual wage, unemployment, agricultural economic statistics, and transportation access. 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 2006.

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 sub sectors that are included in them can be found in Appendix 4.

These data only include the private and public sector and do 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 2000-2006 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 2000-2006 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 2006. These data were gathered for the nine counties in the region and New York State.

The final piece of data that were 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 2006 the top three sectors of employment were Government, Manufacturing and Health Care and Social Assistance, as illustrated in Table 14 - *Employment in the G-FL Region by Major Sector (2006)*.

Table 14 - Employment in the G-FL Region by Major Sector (2006)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	1,048	490	460	607	621
Mining	73	-	148	86	40
Construction	772	930	12,058	2,663	266
Manufacturing	2,986	2,236	59,187	6,986	2,004
Wholesale Trade	1,012	435	13,979	1,694	106
Retail Trade	2,519	2,706	39,838	8,464	1,410
Transportation and Warehousing	565	304	6,475	1,222	219
Information	229	203	9,637	645	97
Finance and Insurance	372	344	11,834	1,063	-
Real Estate and Rental and Leasing	177	151	5,813	387	42
Professional and Technical Services	547	338	20,389	1,399	91
Management of Companies and Enterprises	74	72	11,141	56	-
Administrative and Waste Services	410	263	20,454	1,417	200
Educational Services	186	61	21,560	884	-
Health Care and Social Assistance	2,383	1,831	54,701	6,188	1,437
Arts, Entertainment, and Recreation	1,048	162	4,928	1,138	103
Accommodation and Food Services	1,858	1,776	23,944	4,500	645
Other Services	1,079	631	12,969	1,472	276
Total, All Government	5,870	6,793	47,498	8,157	4,263
Unclassified	40	42	850	112	29
Total, All Private	17,477	13,201	331,515	41,186	8,716
Total, All Industries	23,347	19,994	379,013	49,343	12,979

Source: Quarterly Census of Employment and Wages

Table 14 - Employment in the G-FL Region by Major Sector(2006) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	120	1,422	824	149	5,741
Mining	-	-	-	-	347
Construction	284	1,270	464	275	18,982
Manufacturing	1,830	5,856	2,333	1,046	84,464
Wholesale Trade	219	719	185	64	18,413
Retail Trade	2,126	3,089	1,635	656	62,443
Transportation and Warehousing	234	228	406	122	9,775
Information	25	280	94	68	11,278
Finance and Insurance	153	487	303	110	14,666
Real Estate and Rental and Leasing	53	203	78	107	7,011
Professional and Technical Services	172	603	214	124	23,877
Management of Companies and Enterprises	-	239	-	29	11,611
Administrative and Waste Services	208	875	-	52	23,879
Educational Services	-	87	26	-	22,804
Health Care and Social Assistance	1,393	2,627	697	1,056	72,313
Arts, Entertainment, and Recreation	78	335	169	49	8,010
Accommodation and Food Services	858	1,515	759	461	36,316
Other Services	245	604	489	281	18,046
Total, All Government	3,085	7,824	4,258	1,287	89,035
Unclassified	12	51	24	24	1,184
Total, All Private	8,314	21,021	10,238	5,243	456,911
Total, All Industries	11,399	28,845	14,496	6,530	545,946

Source: Quarterly Census of Employment and Wages

In 2006, there were 69,010 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. 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 84,464 workers, accounting for 15.5% of regional employment and 18.5% 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 73,313 employed in the sector. This can be attributed to the many healthcare facilities in the region combined with an aging regional population. In fact, employment in the Healthcare and Social Assistance sector has increased by over 1,000 jobs since 2004.

Retail Trade had 62,443 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 2006 are shown in Table 15, *Change in Employment by Major Sector in the G-FL Region (2000-2006)*.

Table 15 -Change in Employment by Major Sector in the G-FL Region (2000-2006)

	2000	2006	Change	% Change
Agriculture, Forestry, Fishing & Hunting	5,504	5,741	237	4.3
Mining	366	347	-19	-5.2
Construction	19,990	18,982	-1,008	-5.0
Manufacturing	110,177	84,464	-25,713	-23.3
Wholesale Trade	19,124	18,413	-711	-3.7
Retail Trade	65,575	62,443	-3,132	-4.8
Transportation and Warehousing	9,333	9,775	442	4.7
Information	12,938	11,278	-1,660	-12.8
Finance and Insurance	15,191	14,666	-525	-3.5
Real Estate and Rental and Leasing	7,523	7,011	-512	-6.8
Professional and Technical Services	23,942	23,877	-65	-0.3
Management of Companies and Enterprises	10,831	11,611	780	7.2
Administrative and Waste Services	26,496	23,879	-2,617	-9.9
Educational Services	17,087	22,804	5,717	33.5
Health Care and Social Assistance	67,955	72,313	4,358	6.4
Arts, Entertainment, and Recreation	7,146	8,010	864	12.1
Accommodation and Food Services	37,141	36,316	-825	-2.2
Other Services	16,210	18,046	1,836	11.3
Total, All Government	85,862	89,035	3,173	3.7
Unclassified	293	1,184	891	304.1
Total, All Private	476,063	456,911	-19,152	-4.0
Total, All Industries	561,925	545,946	-15,979	-2.8

Source: Quarterly Census of Employment and Wages

There was a loss of 25,713 manufacturing jobs in the six year period from 2000 to 2006 for a decrease of 23.3%. This accounted for most of the overall loss in private sector employment. Public sector employment grew by 3,173 jobs but that could not offset the job loss in the private sector. There was still a loss of 15,979 jobs in all industries. Many of the major industry sectors experienced a decline in employment between 2000 and 2006.

The largest increase between 2000 and 2006 was in Educational Services with a gain of 5,717 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. Educational Services only includes private institutions. Other major sectors that experienced an increase in employment were Health Care and Social Assistance; Arts, Entertainment and Recreation; Government; Agriculture, Forestry, Fishing and Hunting; Transportation and Warehousing; and Management of Companies and Enterprises.

3.4.c Establishments

As the regional economy shifts from a largely industrial based economy it also shifts in the composition of establishment and establishment size. Table 16, *Number of Firms in the G-FL Region by Major Sector (2006)*, shows that there has been a shift from large establishments to smaller and medium sized ones as sources of employment, with the number of firms in the region increasing accordingly.

Table 16 – Number of Firms in the G-FL Region by Major Sector (2006)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	57	46	48	51	46
Mining	7	-	11	8	5
Construction	141	157	1,541	314	79
Manufacturing	92	70	947	160	42
Wholesale Trade	97	57	1,087	161	16
Retail Trade	202	210	2,236	518	117
Transportation and Warehousing	33	28	314	52	29
Information	13	18	272	46	7
Finance and Insurance	57	55	1,071	124	-
Real Estate and Rental and Leasing	44	43	735	81	15
Professional and Technical Services	84	95	1,933	217	27
Management of Companies and Enterprises	8	4	132	7	-
Administrative and Waste Services	40	46	891	129	19
Educational Services	16	4	254	17	-
Health Care and Social Assistance	137	113	1,658	229	84
Arts, Entertainment, and Recreation	31	29	249	74	17
Accommodation and Food Services	128	144	1,323	262	58
Other Services	153	139	1,774	264	76
Total, All Government	78	88	315	116	62
Unclassified	38	42	712	91	26
Total, All Private	1,380	1,301	17,191	2,806	690
Total, All Industries	1,458	1,389	17,506	2,922	752

Source: Quarterly Census of Employment and Wages

Table 16 - Number of Firms in the G-FL Region by Major Sector (2006) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	13	105	53	20	439
Mining	-	-	-	-	31
Construction	65	283	88	80	2,748
Manufacturing	40	142	48	43	1,584
Wholesale Trade	24	91	28	15	1,576
Retail Trade	174	276	150	92	3,975
Transportation and Warehousing	18	40	40	14	568
Information	9	26	13	8	412
Finance and Insurance	30	70	33	16	1,456
Real Estate and Rental and Leasing	17	53	19	17	1,024
Professional and Technical Services	38	118	46	28	2,586
Management of Companies and Enterprises	-	10	-	4	165
Administrative and Waste Services	25	92	-	18	1,260
Educational Services	-	13	4	-	308
Health Care and Social Assistance	67	152	63	57	2,560
Arts, Entertainment, and Recreation	9	42	20	9	480
Accommodation and Food Services	67	150	70	49	2,251
Other Services	59	189	84	59	2,797
Total, All Government	56	122	63	40	940
Unclassified	14	52	19	20	1,014
Total, All Private	678	1,907	812	551	27,316
Total, All Industries	734	2,029	875	591	28,256
<i>Source: Quarterly Census of Employment and Wages</i>					

In 2006, there were 28,256 establishments in the G-FL region and 27,316 were private sector firms. In the 2000 to 2006 time period, there was an increase in the number of establishments in the region by 1,044, a 4% increase. The large majority of growth in establishments is derived from the private sector, which had an increase of 965 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 2006 was \$38,575. This constitutes an increase of \$178 from the 2000 annual average wage of \$38,397, when adjusted for inflation and expressed in 2006 dollars, as shown in Table 17, *Average Annual Wage for the G-FL Region (2006)*.

Table 17 - Average Annual Wage for the G-FL Region (2006)

	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	\$26,202	\$26,299	\$18,807	\$23,044	\$21,767
Mining	\$39,080	-	\$37,781	\$33,215	\$41,805
Construction	\$36,165	\$39,058	\$45,825	\$44,032	\$35,978
Manufacturing	\$40,879	\$37,649	\$60,436	\$53,181	\$35,678
Wholesale Trade	\$48,642	\$39,878	\$58,526	\$60,982	\$41,594
Retail Trade	\$22,119	\$24,593	\$21,923	\$21,418	\$18,395
Transportation and Warehousing	\$34,255	\$29,023	\$30,985	\$32,409	\$25,698
Information	\$35,437	\$24,292	\$56,853	\$35,811	\$12,466
Finance and Insurance	\$45,472	\$30,458	\$63,424	\$40,637	-
Real Estate and Rental and Leasing	\$28,312	\$22,323	\$30,665	\$27,493	\$17,458
Professional and Technical Services	\$41,140	\$28,244	\$52,191	\$50,613	\$21,153
Management of Companies and Enterprises	\$62,212	\$32,819	\$78,435	\$42,209	-
Administrative and Waste Services	\$22,681	\$23,511	\$27,834	\$24,527	\$16,421
Educational Services	\$22,705	\$17,899	\$46,411	\$30,824	-
Health Care and Social Assistance	\$25,996	\$26,548	\$34,381	\$31,047	\$26,467
Arts, Entertainment, and Recreation	\$14,707	\$10,259	\$17,607	\$16,837	\$11,783
Accommodation and Food Services	\$12,472	\$10,460	\$13,845	\$13,850	\$9,018
Other Services	\$16,845	\$28,899	\$22,412	\$17,509	\$14,888
Total, All Government	\$35,721	\$36,260	\$41,738	\$37,806	\$41,342
Unclassified	\$20,797	\$16,706	\$21,757	\$26,527	\$12,578
Total, All Private	\$28,751	\$27,445	\$41,371	\$33,016	\$25,723
Total, All Industries	\$30,504	\$30,440	\$41,417	\$33,808	\$30,853

Source: Quarterly Census of Employment and Wages

Table 17 - Average Annual Wage for the G-FL Region (2006) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	\$20,500	\$27,120	\$25,910	\$17,861	\$24,654
Mining	-	-	-	-	\$37,386
Construction	\$37,748	\$37,492	\$34,052	\$25,669	\$43,453
Manufacturing	\$49,556	\$40,487	\$33,252	\$32,570	\$55,239
Wholesale Trade	\$27,408	\$42,220	\$41,330	\$37,085	\$56,416
Retail Trade	\$20,714	\$21,378	\$21,657	\$20,053	\$21,804
Transportation and Warehousing	\$33,346	\$29,832	\$26,625	\$38,796	\$31,119
Information	\$23,213	\$22,346	\$23,738	\$25,053	\$52,847
Finance and Insurance	\$34,373	\$36,857	\$44,353	\$32,573	\$58,733
Real Estate and Rental and Leasing	\$21,085	\$22,771	\$17,823	\$19,355	\$29,555
Professional and Technical Services	\$25,172	\$52,427	\$31,073	\$42,060	\$50,957
Management of Companies and Enterprises	-	\$55,401	-	\$32,944	\$77,286
Administrative and Waste Services	\$38,003	\$26,884	-	\$26,180	\$27,456
Educational Services	-	\$17,424	\$12,054	-	\$45,388
Health Care and Social Assistance	\$26,731	\$26,540	\$26,604	\$24,096	\$32,807
Arts, Entertainment, and Recreation	\$19,120	\$15,074	\$12,639	\$16,552	\$16,692
Accommodation and Food Services	\$12,310	\$10,514	\$9,832	\$11,733	\$13,238
Other Services	\$14,022	\$17,987	\$19,220	\$18,708	\$21,385
Total, All Government	\$40,722	\$35,724	\$42,345	\$32,610	\$39,878
Unclassified	\$23,195	\$17,724	\$22,976	\$13,266	\$21,466
Total, All Private	\$29,408	\$32,495	\$27,915	\$25,173	\$38,321
Total, All Industries	\$32,470	\$33,371	\$32,154	\$26,639	\$38,575

Source: Quarterly Census of Employment and Wages

This small increase can primarily be attributed to public sector employment. During the 2000 to 2006 time period, the average annual wage for private sector employment fell by \$247.

The third highest average annual wage by major sector was in Manufacturing. Although this sector has experienced a large loss in employment, wages have remained high and increased by \$80 in constant dollars between 2000 and 2006. This is significant, especially compared to a loss of \$247 in wages for all private industry employment in the region. Indeed, in the largest growing sector, Education Services, the average annual wage decreased by \$3,176 in constant dollars.

The major sectors with the lowest average wages in 2006 were Accommodation and Food Services; Arts, Entertainment and Recreation; and Other Services. This may be partially attributed to the fact that these sectors are more likely to have part-time workers, thus making their wages lower since they work less. Although the part-time status of many of these positions may factor into the lower wages, it should also be noted that the average annual wage in each of these sectors fell between 2000 and 2006 in constant dollars.

3.4.e Unemployment

In 2006, the unemployment rate for the G-FL region was 4.4% which constitutes an increase of 0.7% from 2000. This is illustrated in Table 18, *Unemployment Rate for the G-FL Region, NYS and the US (2000-2006)*.

Although there was an increase in the unemployment rate for the G-FL region from 2000 to 2006, the region's unemployment rate dropped from 4.7% in 2005 to 4.4% in 2006. The region's unemployment rate was also lower than both New York State and the nation in 2006. Wyoming, Livingston and Orleans Counties, however, had unemployment rates higher than the region, state and nation in 2006.

While the region's unemployment rate was lower than both the state and the nation in 2000 and 2006, during that same time period the region's unemployment rate rose slightly higher at a 1% increase than the nation's rise of 0.6% and the state's constant rate.

Table 18 - Unemployment Rate for the G-FL Region, NYS and the US (2000-2006)

	2000	2006	% Change
Genesee	3.9	4.5	0.6
Livingston	4.1	4.8	0.7
Monroe	3.5	4.3	0.8
City of Rochester	4.5	5.7	1.2
Ontario	3.5	4.3	0.8
Orleans	4.7	5.6	0.9
Seneca	4.3	4.5	0.2
Wayne	3.8	4.6	0.8
Wyoming	4.7	4.8	0.1
Yates	3.7	4.1	0.4
G-FL Region	3.7	4.4	0.7
NYS	4.5	4.5	0
US	4.0	4.6	0.6

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 19, *Agricultural Economic Statistics for the G-FL Region (2006)*.

Table 19 - Agricultural Economic Statistics for the G-FL Region (2006)

	Number of Farms	Farmland (Acres)	Cash Receipts (in dollars)		
			Crops	Livestock	All Products
Genesee	545	173,800	62,781,000	77,214,000	139,995,000
Livingston	750	205,000	38,357,000	55,178,000	93,535,000
Monroe	595	104,400	57,167,000	8,323,000	65,490,000
Ontario	840	190,500	49,070,000	49,393,000	98,463,000
Orleans	470	130,200	76,448,000	7,803,000	84,251,000
Seneca	435	124,600	24,186,000	26,753,000	50,939,000
Wayne	850	161,700	91,546,000	31,441,000	122,987,000
Wyoming	720	210,800	44,185,000	147,661,000	191,846,000
Yates	680	112,700	27,491,000	29,319,000	56,810,000
G-FL Region	5,885	1,413,700	471,231,000	433,085,000	904,316,000
NYS	35,600	7,500,000	1,500,764,000	1,981,711,000	3,482,475,000
% NYS Total	17%	19%	31%	22%	26%

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

There were 5,885 farms in the G-FL region in 2006, constituting a total of 1,413,700 acres of farmland. In 2006, the agricultural industry in the G-FL region yielded \$904,316,000 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. 31% of the state's cash receipts in crops and 22% of cash receipts in livestock also came from the G-FL region.

There are some indicators that agriculture is being strengthened while others point to it being threatened. Between 2000 and 2006, there was a net loss of 75,500 acres of farmland in the region and a net loss of 640 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 \$808,186,000. In the following six year period, cash receipts increased by \$96,130,000 to \$904,316,000. Both livestock and crop cash receipts increased by 12% over this time period.

3.4.g Economic Analysis Tools

The following section will analyze the regional economy with economic analysis tools. The first tool used will be the economic base multiplier which measures the basic and non-basic sectors of the economy. The economic base multiplier was derived using location quotients. The location quotient approach to calculating base multipliers is somewhat flawed, as there are problems with the assumptions used to derive the equations. Please see Appendix 8 for an explanation of the assumptions used when calculating location quotients.

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

for demand for a region's exports. In 2006, the base multiplier for the G-FL Region was 2.34. This means that for every job added to the export sector there was an additional 1.34 jobs added to the nonbasic sector.

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

In 2006, the industry in which the G-FL Region was the most specialized was Chemical Manufacturing, which had a location quotient of 4.39, as shown in *Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2006)*.

The strength in that industry is great but it also experienced a decrease between 2000 and 2006 and even between 2005 and 2006; the location quotient in 2000 was 5.76 and in 2005 was 4.58. Machinery Manufacturing had the second highest location quotient and Animal Production was third. Beverage & Tobacco Product Manufacturing and Miscellaneous Manufacturing also were in the top 5 industries by location quotient in 2006.

Table 20 - Top 15 Industries by Location Quotient in the G-FL Region (2006)

NAICS	Industry	2006 LQ
325	Chemical Manufacturing	4.39
333	Machinery Manufacturing	3.32
112	Animal Production	2.46
312	Beverage & Tobacco Product Manufacturing	2.07
339	Miscellaneous Manufacturing	1.87
326	Plastics & Rubber Products Manufacturing	1.77
551	Management of Companies and Enterprises	1.62
813	Membership Organizations & Associations	1.55
334	Computer and Electronic Product Mfg	1.53
445	Food and Beverage Stores	1.52
712	Museums, Parks and Historical Sites	1.50
624	Social Assistance	1.49
623	Nursing and Residential Care Facilities	1.46
332	Fabricated Metal Product Manufacturing	1.45
111	Crop Production	1.39

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, passenger rail service, and ferry service 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, across the nation, and around the globe.

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 for 2001, trucks handled 91% of all inbound traffic to the region and 99% of all outbound traffic, totaling 57 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.

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 or "shortline" (annual revenues less than \$20 million) railroads operate in the region. Less than 10% of the total tonnage imported to the region in 2001 arrived by rail. More than half of this 2 million tons was coal shipped from mines south of New York State. At the same time, less than one percent of the total tonnage produced by firms in the region was shipped out via rail. 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 207,000 tons of freight was shipped through facilities at the Greater Rochester International Airport (GRIA) in 2002. This was a more than 400% increase over the amount of tonnage transported through GRIA in 1995. In 2002, GRIA was the largest air cargo airport in upstate New York. While the tonnage shipped through GRIA will in all likelihood never compete with that transported by truck, the value of goods moving through GRIA will gain a greater share

of the regional total in the future. As the regional economy continues to transition itself 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 throughout 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 it³.

³ 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, workforce development, transportation, land use, water quality and other planning activities all work in concert to create better and stronger communities. Below are descriptions of the programs and activities in which G/FLRPC, the region, and New York State are engaged.

4.1 Regional Revolving Loan Fund

G/FLRPC believes that business owners provide the backbone for the region's economy. In an effort to support this belief, the Council and 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. In the past year, two new loans have led to an increase in the high quality, diverse loan portfolio that 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 starting a company in the state, relocating to or establishing a presence in the state, expanding already existing operations in the state, retaining and enlarging their workforce in the state, and in competing more effectively and profitably in domestic and international markets.

In order to support the revitalization of upstate New York and to provide financial support in a strategic way that recognizes existing regional advantages, cluster development, transportation access and workforce development, ESD is undertaking several initiatives. The first of these is the Regional Blueprint Fund, which will be used to take advantage of the unique assets in each part of the state and provide financial support for projects that will enhance each specific upstate New York region's economic advantages. Secondly, specific City-by-City Investments will support specific critical economic development projects throughout upstate New York cities, including the Midtown Plaza redevelopment and the University of Rochester's Clinical and Translational Science Institute in the City of Rochester. Thirdly, through Upstate Housing Investments, New York State will dedicate \$100 million towards the development of affordable, supportive, and workforce housing to ensure upstate New York will be able to provide quality affordable housing in order to attract employees to support business needs. A fourth initiative is the Agricultural Development Fund, which will support the continued growth of the food and agricultural industry by encouraging investments that promote the development of alternative fuel products, access to markets, and improvements in farm and agricultural infrastructure. The agricultural development

initiative coincides with the G-FL region's emerging agribusiness and food processing cluster and presents an opportunity for continued growth in this cluster. Finally, through Upstate Infrastructure Investments, New York State will continue to provide funding to maintain and upgrade local road systems, ensuring vehicular transportation access remains viable.

ESD, and New York State, offer a range of additional programs and services; below are a sample of several.

4.2.a Empire Zones

An Empire Zone is an area designated by ESD that encourages economic development, business investment and job creation through a variety of incentives. It also promotes a coordinated effort between state and local economic developers to stimulate job creation in distressed areas. The Genesee-Finger Lakes Region currently has Empire Zones in Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne and Wyoming Counties and the cities of Geneva and Rochester. A zone designation should now be made in Yates County.

4.2. b Centers of Excellence

New York State's Centers of Excellence program is designed to create university, private and public sector partnerships supporting the development of promising technologies with commercial applications, intended to support rapid commercialization of scientific breakthroughs. The Centers of Excellence in New York State and their respective specializations and locations are: Bioinformatics and Life Sciences in Buffalo; Infotonics Technology in Canandaigua, located in the G-FL region; Nanoelectronics in Albany; Information Technology on Long Island; Environmental Systems in Syracuse; and Small Scale Systems Integration and Packaging in Binghamton. Centers of Excellence, along with programs aimed at technology incubation and supporting high- and bio-technology, demonstrate the state's recognition of the importance of nurturing an innovation economy in New York State.

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. This program also creates an inventory of locations for a wide range of business profiles and promotes the locations as ready for development. The program is modeled after the successful SEMI-NY program and the desired outcome is to make New York State more desirable during the site selection process. Build Now-NY sites within the region are listed in Table 21.

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
Crossroads Commerce Park	Town of Avon, Livingston County	Distribution/Logistics/E-Commerce Fulfillment
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
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
Pembroke Business Park	Town of Pembroke, Genesee County	Multi-Tenant Business & Technology Park
Genesee O-At-Ka Agri-Business Park	Town of Batavia, Genesee County	High Technology Manufacturing
PEZ Lake Development Facility	Town of Romulus, Seneca County	Multi-Tenant Business & Technology Park

Source: Governor's Office of Regulatory Reform, 2007

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 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 create a network of partners who offer energy efficient solutions to reducing energy costs and consumption.

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.

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

4.4 Regional Workforce Development

Workforce development activities in the region are performed at a largely regional level, coordinated by three workforce investment boards. Additionally, the region is in the midst of a three year 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 thirteen regions in the United States chosen for a three year \$15 million grant from the United States Department of Labor. The funding is provided through the WIRED Initiative. The goal of the WIRED Initiative is to “expand employment and advancement opportunities for American workers and catalyze the creation of high-skill and high-wage opportunities in the context of regional economies.” Along with funding, the award also brings technical assistance and access to a cadre of experts to the region.

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

The project was crafted by the Finger Lakes Partnership, a broad group of stakeholders, including civic, business, investor, academic, entrepreneurial and philanthropic members, which included G/FLRPC. Since being chosen as a recipient of the WIRED initiative, the Finger Lakes Partnership has adjusted its moniker to leverage the United States Department of Labor WIRED Initiative. As a result, the Partnership is now known as Finger Lakes Wired.

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

The Governing Board has utilized strategic feedback from its National Advisory Panel to refine specific activities associated with Finger Lakes Wired as well as to identify other opportunities for improvement in the planning of regional economic development activities.

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

4.4.a.i Finger Lakes Wired Funded Initiatives

The following are initiatives funded by Finger Lakes Wired:

1. The Friendly Home Long Term Care Facility Career Pathway

The project establishes a career path for individuals in the long-term healthcare industry.

- 15 formerly unemployed individuals have completed the 90 hour training program and were immediately employed by the Friendly Home or other partners.

2. Finger Lakes Winery Business Training & Support Program

An identified need was the lack of proper business and financial training on the part of winery owners and key staff. This program helps to develop the skill sets of those key stakeholders. Training was developed in conjunction with the NYS Wine and Grape Foundation, winery industry consultants, winery owners and the consultant who teaches the classes. This initiative is intended to bolster the region's emerging agribusiness and food processing cluster, a targeted industry cluster.

- 43 business owners have participated in workshops and other business and production improvement efforts since the summer of 2007.

3. 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 that will enhance awareness of STEM opportunities in the G-FL Region.

- 150 scholarships were provided as follows:
 - Cornell Cooperative Extension of Ontario County, 4-H Camp Bristol Hills for 51 students
 - Finger Lakes Institute - Hobart & William Smith Colleges, Kids College for 22 students
 - Infotonics Summer Science Camp for 25 students
 - Rochester Institute of Technology, Kids on Campus for 30 students
 - University of Rochester, Rochester Scholars for 22 students

4. 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. Educators from fifteen school districts received internships.

- 16 educators completed projects with 14 businesses in the region. These 16 educators provided information on key growth industries to approximately 184 colleagues and more than 540 students in the region.

5. Strategic Growth through Innovation Program

Emphasis is placed on selecting participants with expertise in emerging cluster 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 such businesses, leveraging existing networks. High growth, small enterprises are supported through this immersion program.

- 40 business executives completed the first program in December 2007.

6. The Golden Horseshoe Business Challenge

The intent of the business plan contest is to stimulate the formation of new companies in the region, and to raise the profile of the entire Lake Ontario region. New collaborations

have been forged as a result of the business plan contest. The winner of the inaugural Golden Horseshoe Business Plan contest was from the G-FL region.

7. Masters of Science in Science & Technology Commercialization

Through a partnership with the University of Texas at Austin, classes are taught via distance learning allowing students to access to this innovative program. Scholarships were provided at \$10,000 which will impact student diversity, minority participation and the needs of the students. The scholarships are provided with the caveat that the student will work in the region after completion.

- Six students have accessed over 22 technologies with one selected for a full commercialization plan from the University of Rochester.

8. 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 of leader to visit target companies in order to match regional assets with industry leaders and create 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. An executive level outreach campaign to inform decision makers and provide leads is being planned. ZoomProspector will map regional assets such as real-time information about a specific site location, including demographics, workforce data, and industry information, and to be able to obtain this data on-line.

Information provided through this ongoing effort will help the public workforce system and various education and training partners structure talent development efforts in the region.

9. Predictive Analysis for Business Retention & Expansion

The Business Retention and Expansion project will help economic development agencies in the region become more efficient with scarce resources. The project will help identify local companies that are likely to expand or to contract so that economic development officials can intercede to produce a positive outcome. The initial BR&E model was tested in the eight counties outside of Monroe and was revised due to the outcomes of that test.

- To date, more than 1,100 companies have been identified that may have a significant change in their business (either expansion or contraction) and lists have been generated and distributed to the economic development agencies in the region.

10. Developing a Regional Apprenticeship System

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

the region. The model can be replicated for other industries that require high-skilled workers. The collaboration among colleges provides businesses with a pipeline of skilled workers.

- Two of three planned apprenticeship programs were launched in 2007
 - Monroe Community College's optical fabricator apprenticeship program currently has 20 employees from four optics firms participating
 - Finger Lakes Community College's bio-technology/bio-manufacturing program has 28 participants
 - Genesee Community College is expected to launch a healthcare program in the summer of 2008

11. 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.

- 74 applicants have been assisted with strategies and proposals leveraging other efforts such as NYSTAR and Insyte Consulting. Twelve proposals were submitted with funding decisions made in early 2008.

12. Scholarship Program

The Scholarship program provides 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 leading to transferable skills and industry recognized credentials.

- Since the program launch in September 2006, Finger Lakes Wired has allocated \$1.4 million for 100 businesses to increase the skills of 2,671 workers with \$3.3 million in matching funds.

13. Technology & Innovation Commercialization

The project trains researchers, students, faculty and entrepreneurs to increase skills and success with technology commercialization. It also creates a more integrated approach among partners to improve business development. Demonstrates how to integrate research and new product design with the benchmarks associated with key industries and emerging industry clusters. Participants and technologies have been 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.

14. The Entrepreneurs Network (TEN)

The program is a six month program including a boot camp, workshops and panel events that are designed to optimize exposure to and interaction with leading entrepreneurial

experts to introduce local entrepreneurs to new ideas and attract needed capital investments.

- TEN has served more than 85 executives spanning the nine-county region, as well as the cities of Buffalo, Ithaca and Syracuse. TEN members have created more than 50 jobs, increased revenue by more than \$5.7 million and secured \$7.2 million in angel and venture capital investments.

15. Young Entrepreneurs Academy

Students start their own business under this innovative project developed by the University of Rochester with support from the Kauffman Foundation. The program expanded to SUNY Geneseo in September 2007 serving 23 students. 26 11th and 12th grade academy participants have started their own businesses.

Other areas targeted for expansion over the next several years include Hobart & William Smith Colleges, Genesee Community College, Keuka College, and SUNY Brockport.

16. 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.

More than 50 business leaders were contacted and several events were held to provide an opportunity for leaders to connect across industry segments and understand the resources available in the region. More than 100 leaders attended such events and will continue to be involved in the process in the future.

17. The Essential Links

This program creates a formal network of food and agricultural business leaders to increase innovation and leverage assets in this emerging industry cluster throughout the region.

More than 100 leaders from academic, scientific, imaging, agricultural and government organizations met for the first Photonics, Food and Agriculture conference in November 2007. Several collaborative initiatives arose to leverage agricultural and imaging technologies. Additionally, a workforce needs assessment workshop in January 2008 brought 44 food and agriculture industry business owners together.

18. Finger Lakes Advanced Manufacturing Enterprise

This program expands a formal network of advanced manufacturing business leaders to increase innovation and support the growth of the high tech manufacturing cluster in the region. Approximately 50 leaders from academic, advanced manufacturing and government organizations have connected to discuss opportunities to increase talent and leverage assets in the region to support business growth.

4.4.a.ii Finger Lakes Wired Related Activities

The success of Finger Lakes Wired has led to other successes in the G-FL region, where organizations and institutions have leveraged Wired funding, including:

1. The University of Rochester received \$3.5 million over five years from the Kauffman Foundation to spur entrepreneurship throughout the university and to engage the community. The grant has utilized the Youth Entrepreneurs Academy which the partners hope to expand throughout the region.
2. The Entrepreneurs Network (TEN) has secured \$155,000 from the County of Monroe Industrial Development Agency to support services to regional company chief executives and founders in the region, matching the WIRED investment. TEN members have secured more than \$7 million in angel and venture capital investments.
3. One hundred regional businesses have committed \$3.3 million to support employee training provided through the Finger Lakes Wired Scholarship program as noted above.
4. The use of WIRED funding to skills upgrade training has supported the commitment of approximately \$2,700,000 in funding from New York State Economic Development to support company expansion efforts at Rochester Insulated Glass, Pactiv and other key businesses.
5. The Infotonics Technology Center has secured \$3 million from the US Department of Commerce Economic Development Administration and \$3 million from New York State to renovate incubator space for startup photonics, information systems and optics businesses. It would also help in the construction of the Infotonics Commercialization Center and in the process could create about 200 jobs for region.
6. Rochester Institute of Technology (RIT) received a \$1.1 million USDOL High Growth Job Training Initiative grant to enable RIT and its partners to provide high skill training to businesses engaged in the food and beverage manufacturing industry throughout the region. RIT is working closely with Constellation Brands, Wegmans Food Markets, the New York Wine and Culinary Center and the region's Workforce Investment Boards.
7. The three Workforce Investment Boards and Community Colleges in the region have come together to support increased recruitment and training of technician level workers for optics, printing and advanced manufacturing companies throughout the region.
8. Monroe Community College has secured \$15,000 from Corning, Inc. to support its work with apprenticeship and worker pipeline improvements for the optics industry.

9. Finger Lakes Wired is working to support the development of the Center for Excellence in Math and Science under the Rochester Area Colleges. The Rochester Area Colleges is a consortium of 19 college and universities located throughout the nine county G-FL region. The Center for Excellence in Math and Science is a unique collaborative effort building on the strengths of individual members to foster advanced preparation and success in the preparation of students in fields such as engineering, medicine, computer technology, health and human services, research and development and teacher education. \$900,000 has been secured from Senator Charles Schumer to expand this important effort.
10. A proposal to create the Upstate Partnership under the New York State Office of Science, Technology & Academic Research (NYSTAR) Regional Partnership Program Request for Proposals is underway. The Upstate Partnership builds on the early work of Finger Lakes Wired. Several Finger Lakes Wired activities will find sustainability and support through this NYSTAR effort as it may be implemented by New York State. The Upstate Partnership will utilize the Finger Lakes Wired Governing Board to advise the NYSTAR related activities as well as target its work around new and emerging Optics & Imaging, Biotech & Life Sciences, Food & Agriculture and Alternative Energy companies while enhancing competencies in Information Technology and Advanced Manufacturing.
11. The Upstate Partnership led by Excell Partners, Inc., plans to maximize the ability of the region to transform new knowledge and technologies into commercial use for the benefit of existing and emerging companies through a seamless and coordinated infrastructure.
12. Leveraged resources were provided through workforce investment boards, community colleges, economic development agencies, universities and the regional chamber of commerce. The amount of leveraged resources provided through partner members would equal more than \$2 million when considering the amount of time and other resources spent by senior level managers on the project since the initial award.

4.4.b 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.

4.4.c 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. In addition to providing the necessary connections between local businesses and job seekers, Finger Lakes Works seeks to provide programs and career awareness surrounding the emerging workforce. Finger Lakes Works provides employment assistance, soft skills training, and workshops through its one stop centers; holds an annual job fair attended by employers and job seekers alike; and, in 2006, administered nearly \$300,000 in individual training accounts and filled over 10,000 jobs.

4.4.d 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 sectors such as advanced manufacturing, information technology, engineering, health care, and optics. Rochester Works provides training and support to job seekers through skill development and job training services provided at its career centers; workshops and networking opportunities; and youth employment training and programming. Employees of existing businesses and the businesses themselves are further provided assistance through a series of grants aimed at training existing workforces in occupational skills furthering their career and wage prospects.

4.5 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 work is beneficial on many levels including economic development, land use and environmental justice. Additional potential benefits of brownfield redevelopment include:

- The protection of human health and the environment;
- Increased tax base;
- Restored or replaced dilapidated buildings and sites;
- Job creation;
- Strengthened economic centers;
- Utilization of existing infrastructure; and
- Prevention of the spread of contaminants.

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

G/FLRPC, along with the Village of Perry and Wyoming County, will be administering a Brownfield Opportunity Areas Program in the Village of Perry. This program will develop a study area for an approximately 10-30 acre area in the Village of Perry and will also establish a community participation process, identify and create partnerships, and complete a preliminary analysis of the study area and develop preliminary recommendations to revitalize the area. The brownfield program is anticipated to

facilitate redevelopment of these potential brownfield sites located in the village's business district so as to stimulate economic development and job creation while promoting compact, in-fill development.

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

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

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

4.6 Fingers Lakes Land Use Project

The Finger Lakes Land Use Project has been under development by G/FLRPC. The research and analysis done as part of the project will address the issue of growth, development, changing land use patterns, open space, and the effects this has on the natural (i.e. lakes, streams, woods) and cultural (i.e. farms, villages, cities.) landscapes of the G-FL region.

The first 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. Development of data and information is on-going 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 from a tourism, and therefore, economic

development standpoint. Also, consideration is being given to these already developed areas, most of which have existing infrastructure. This indicator seeks to measure the vitality of downtowns and their contribution to the existing and potential tourist market. This portion of the analysis examines what uses and built forms are viable in order to maximize the potential of downtown areas and ensure that they remain active and vibrant. Data indicators include analyses regarding property values and comparisons of local land uses and general socio-economic analysis within targeted census blocks.

The second phase of the project will focus on municipal outreach. The findings of the initial research will be presented to the municipalities and technical assistance will be available to municipalities that wish to pursue planning activities.

4.7 Infrastructure

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

4.7.a Transportation

The transportation network in the region supports the movement of goods and people and, ultimately, influences the condition of the regional economy. The physical infrastructure consists of approximately 12,000 centerline miles of interstate, arterial and collector roadways, 650 miles of active railroad lines, over 200 miles of multi-use trails, and several intercity transportation facilities. Public transportation services are available in all but Yates County; a study is being undertaken to determine the feasibility of providing service there.

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

The mission of GTC is to maximize the contribution of the transportation network to the social and economic vitality of the G-FL 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, outlined below, address both the long and short term transportation challenges facing the region and proposed actions to address these items.

4.7.a.i The Long Range Transportation Plan

The Long Range Transportation Plan (LRTP) provides a 20-year analysis of existing and projected transportation system capabilities, issues, and opportunities, as well as alternatives to address these issues and maximize opportunities. This assessment is performed in the context of the eight major transportation planning focus areas established by the federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), enacted in 2005. It provides the framework for guiding the planning and implementation of transportation improvements in the region. The *Long Range Transportation Plan for the Genesee-Finger Lakes Region: 2007-2027* (LRTP: 2007-2027) was adopted in June 2007.

4.7.a.ii The Unified Planning Work Program

The Unified Planning Work Program (UPWP) establishes the program of federally funded transportation planning activities using the objectives and strategies identified in the LRTP. These planning projects must be consistent with and advance the overall objectives and strategies identified in the LRTP. The UPWP is updated annually. Planning projects completed or currently underway which reflect the intersection of transportation and economic development in the region are Center City Way-Finding Sign Update, Regional Tourism Signage Study, Route 14 Truck Study, Goods Movement Planning, Optimizing Transportation Through Efficient Use of Infrastructure, Area Wide Job Access and Reverse Commute Plan and several corridor and business district studies.

4.7.a.iii Regional Goods Movements Strategy

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

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

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

The Transportation Improvement Program (TIP) identifies the timing and funding of all transportation improvements involving federal funds over the next five years for the region. These projects typically emerge from the UPWP planning process and must be consistent with the overall objectives and strategies identified in the LRTP. The TIP is

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

4.7.b Telecommunications

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

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

Various degrees of information were gathered throughout the region with regards to existing and future telecommunications needs. Several counties have created, or are currently creating, databases of their respective telecommunications network. Monroe County is working with service providers to establish a wireless data network in the county. Some counties have also advanced that inventory by including continued identification and improvement of their networks into the priorities listed in Chapter 5. Genesee, Seneca and Wyoming Counties have completed telecommunications studies and Livingston County is conducting a telecommunications study, while Ontario County is currently constructing a fiber optic ring. The region has identified telecommunications as crucial to economic development and strategies to bolster it in the region are further described in Section 5.1 of this document.

4.7.c Water

Residents in the G-FL 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.⁴

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, while a significant percentage of water used by the City of Rochester is supplemented by water from Hemlock and Canadice Lakes, two Finger Lakes located south of the city. 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 municipalities. Finally, in 2008, the City of Rochester will finalize its plans for compliance with an Environmental Protection Agency regulation that will impact the city's three drinking water storage reservoirs.⁵

4.7.d Wastewater

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

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

The sewer system in Monroe County was separated into four sewer districts; solutions to the sewage problems included significant upgrades to the Frank E. Vanlare Treatment Facility at Durand-Eastman Park in conjunction with gradual consolidation of other regional facilities. The most notable of these solutions, however, was the Rochester Pure Waters Combined Sewer Overflow Abatement Program (CSOAP) and tunnel system.

⁴ City of Rochester, NY Bureau of Water. 2007 Water Quality Report (Water Supply ID # NY2704518).

⁵ City of Rochester, NY Bureau of Water. 2007 Water Quality Report (Water Supply ID # NY2704518).

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 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).⁶ Municipal treatment facilities are routinely evaluated as to their effectiveness and consolidated into the Pure Waters system as resources allow, drastically reducing the costs of sewage system operation.

4.7.d.ii Outside of Monroe County Pure Waters Program

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

According to 1999 data provided by the New York State Department of Environmental Conservation, there were 37 secondary and 27 tertiary treatment facilities operating in the G-FL region (this data is currently being updated as part of the Finger Lakes Land Use project, see section 4.6). 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 consequences of effective water and wastewater facilities, there are economic development implications as well. There is a

⁶ 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/glci/RPWDCSCSOAP~1.pdf>.

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

4.7.e Energy

4.7.e.i Traditional Energy

The energy mix in New York State as a whole is comprised of 29% nuclear power, 22% natural gas, 18% coal, 17% hydropower, 12 % oil, 1% solid waste, and less than 1% each of biomass, wind and solar power⁷. The Genesee-Finger Lakes region is home to one nuclear power plant, the Robert E. Ginna Nuclear Power Plant in Wayne County and two coal-fired power plants, Rochester 7-Russell Station in Monroe County and AES Greenidge in Yates County.

4.7.e.ii Alternative Energy

Alternative energy is one of the region's targeted emerging industry clusters and competencies and presents an opportunity to develop new alternative energy resources and to expand existing alternative energy resources. A significant number of counties and municipalities in the G-FL region have, or are considering industrial wind turbine development. G/FLRPC administers the 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 regional planning councils regarding wind energy. G/FLRPC and NYSARC, in turn, provide direct technical assistance, as well as education and outreach on wind energy planning issues to counties, municipal boards, elected officials, industrial development agencies, code enforcement officers, and other municipal staff. This allows regional planning councils, like G/FLRPC, to be more responsive to the needs of municipalities and provide them with up-to-date, reliable, and accurate information on wind development.

Four ethanol plants are in various states of planning, development, and operation in the G-FL region; in the Town of Shelby (Orleans County), the Town of Greece (Monroe County), the Town of Caledonia (Livingston County), and the Town of Romulus (Seneca County). These plants will utilize existing technology for using corn to produce ethanol, as well as new developments in cellulosic ethanol production, using woody debris and plant fiber to create ethanol. Additionally, the Mill Seat landfill in Monroe County and the Seneca Meadows landfill in Seneca County use methane produced from the landfills for power generation.

⁷ New York Public Service Commission

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

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 industrial wind farm projects being planned for this region (including the ten turbines currently operating in Wethersfield, Wyoming County), Greater Rochester Enterprise has identified more than sixty companies that have capacities to make wind turbine components. Finally, local skills at thin films and imaging, as well as support from centers like the NanoPower Research Labs at Rochester Institute for Technology can be translated to an advantage in solar energy and photovoltaic cell production.

4.8 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.

4.8.a Rochester Embayment Remedial Action Plan

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

Stage I of the RAP process established general water quality goals and objectives, described water quality conditions and identified pollutant sources. Stage II described completed and ongoing remedial actions to address problems, identified actions and measures necessary to restore water quality and described studies and monitoring programs needed to identify problems and track progress. Of the fourteen possible “Beneficial Use Impairments” (i.e. aesthetics, fish consumption, beach closings) listed by the EPA, all were identified to be present within the Rochester Embayment in the Stage I report. As of 2007, significant progress has been made that will eventually lead to the elimination of many of these BUI’s, indicating a gradual improvement of the health of the natural environment of the Embayment and surrounding areas.

The Monroe County Department of Health has the lead role in RAP monitoring, implementation and updates; the RAP process continues to generate invaluable scientific data regarding water quality problems in the Embayment and in upstream areas of the Genesee River Basin. Further information on the status of RAP progress can be found at the EPA website at the following address: <http://www.epa.gov/glnpo/aoc/rochester.html>.

4.8.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.

4.8.c Regional Watershed Planning

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

4.8.d Other Water Resource Initiatives

4.8.d.i Genesee River Action Strategy

The Genesee River Action Strategy is a concise and action-oriented document that compiled currently available information about the state of the watershed and ongoing assessment, outreach and implementation activities in a State of the Basin report and proposed environmental and natural resource priorities and measurable objectives as a strategy for achieving those goals. The process brought together all appropriate agencies and stakeholders to focus support in the form of grant dollars, technical assistance and other resources to address priority water quality and natural resource needs. Some implementation activities outlined in the strategy are currently underway or have been completed. Additionally, G/FLRPC coordinated the development of the Genesee River Basin conference in October 2007 for the purpose of generating awareness and project monitoring.

4.8.d.ii Honeoye Lake Watershed Management Plan

The Honeoye Lake Watershed Management Plan (HLWMP) focuses on the second smallest of the Finger Lakes of New York State. Honeoye Lake is located in the Western Finger Lakes region of New York State and considered part of the metropolitan area of the City of Rochester which is located 28 miles north of the lake. The watershed extends throughout six towns in two counties in the region.

The HLWMP is a document that identifies major action items needed to protect and improve the water quality of Honeoye Lake. The HLWMP characterizes the natural resources, habitats, and environment of the watershed, identifies water quality and living resource impairments, recommends actions to protect the watershed from further degradation, and develops a strategy to restore the watershed. The plan also forms a framework to guide future decisions and provides a point of reference by which progress can be measured.

4.8.d.iii Canandaigua Lake Watershed Land Use Law Project

G/FLRPC provided assistance to the Canandaigua Lake Watershed Council in the development of model laws for environmentally sensitive areas including steep slopes and water courses. This assistance included research, assessment and development of local laws and ordinances that can be used in the Canandaigua Lake Watershed.

4.8.d.iv 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 is intended to aid participants in the Land Use Leadership Alliance Training Program that took place in January and February 2008, as they learn about methods to address priority land use issues within the Keuka Lake watershed. Furthermore, the results will be used to guide the development of “Component III” of the Keuka Lake Looking Ahead project, whereby a “sustainable watershed land use action plan” will be developed to guide municipalities toward the implementation of appropriate land use regulations and controls that will institute sustainable land use practices throughout the watershed.

4.8.d.v 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 seeks to identify, describe and rank riparian corridors, lakes and canals throughout the G-FL 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.

4.8.d.vi 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 recently completed State of the Basin reports and, because of their proximity to each other, both watershed committees, along with state, county, organization and municipal representatives and G/FLRPC, are attempting to work together to efficiently and effectively produce watershed management plans and the resulting implementation.

Watershed planning helps increase quality of life, quality of uses, land use management and land value. It prioritizes issues and helps target funding and allows for restoration and protection of resources. It also calls 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.

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 the components of an implementation strategy.

4.9 Multi-Jurisdictional All Hazard Mitigation Planning

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

G/FLRPC has or is currently working on hazard mitigation plans for the following five counties within the G-FL region: Wayne, Livingston, Wyoming, Orleans, and Genesee. The Wayne County plan was approved by the Federal Emergency Management Agency (FEMA) in January 2007 and has been adopted by the county and all of its municipalities. Monroe County, as well, has an adopted All Hazard Mitigation Plan. The Livingston County plan was approved by the FEMA in March 2008. The Genesee, Orleans, and Wyoming County Plans were approved by the FEMA in May 2008.

4.10 Regional Marketing and Research

4.10.a Greater Rochester Enterprise

Greater Rochester Enterprise (GRE) is supported by a team of private and public sector leaders, whose funding is dedicated to improving economic performance across the G-FL region. GRE's primary goals are to retain and grow existing business; to promote entrepreneurial activities; and to professionally market the region as a competitive, vibrant and high-profile place for business investment. To support business attraction, expansion, entrepreneurship and innovation, GRE collaborates with local businesses, universities, not-for-profit organizations and government leaders to deliver a unified response to regional economic development opportunities.

GRE's client-driven project management services include:

- Professional, timely responses to all requests for information from potential business investors, including site searches and detailed data compilation.
- Professional, full service management of projects.
- Professional proposal development/project management for potential business investor projects that includes:
 - Detailed demographic, statistical, comparative and industry specific information about the region.
 - Detailed site/building searches as needed.
 - Identifying available grants, incentives and financing options.
 - Providing detailed information about living in the region, including housing, schools and cultural amenities.
 - Facilitating meetings with appropriate city, county, 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 is the single point of contact for economic development clients for the City of Rochester, Monroe County and Wayne County and provides marketing assistance to Livingston County. The partnerships formed with these counties assign GRE with a range of responsibilities including marketing, sales and client management. The counties have retained administrative and approval functions for economic incentives and programs, but work in conjunction with GRE in offering incentives and programs in a coordinated team approach.

GRE recently unveiled a web-based, interactive prospector that allows users to view available commercial, industrial and retail sites and buildings throughout the region, including building information, workforce demographics, transportation, and public service amenities. This site prospector 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.

4.10.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.

4.10.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 G-FL region. Data were gathered using surveys, onsite assessments and focus groups. An ongoing relationship was built with the principle collaborative organization for these clusters, the Rochester Tooling and 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 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.

4.10.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.

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 more fully realize the benefits of the Roadmap Project focus.

4.10.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

4.10.b.ii.b The Innovation Test Bed

The Innovation Test Bed is an important resource to identify and facilitate development of needed manufacturing-related innovations and help companies implement them. The Test Bed helps improve the manufacturing-related innovation activities of these vital smaller manufacturers through activities such as:

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

4.10.b.ii.c Cluster Collaboration Support

Cluster collaborative organizations such as industry or trade associations are an effective mechanism to aggregate the resources of smaller companies to address industry challenges. CIMS continues to work with industry and trade associations on effective cluster strategic planning to focus their member's limited resources on actions that will make them collectively more successful.

4.10.b.ii.d Technical Assistance

CIMS works with manufacturing businesses to enhance their competitiveness through the delivery of customized applied technology assistance projects and training. A variety of

resources and services are available to help identify needs, barriers, and deliver solutions to address them for 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; implementation of recommendations.

Implementation of the Roadmap activities will be an ongoing activity requiring continued funding. In the future efforts to secure a continuing stream of funding for implementation of Knowledge Clearing House, Innovation Test bed, Cluster Collaboration and Technical Assistance projects will be made.

4.11 New York State Canal Commission

In 2005, an interagency task force was formed to study the functions of the existing canal ways and the NYS Canal Corporation. This study yielded 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 levels and with enhanced marketing of the canal.

4.11.a Western Erie Canal National Heritage Corridor

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 Alliance (WECA) was formed in March 2006 as a non-profit corporation to implement the management plan. 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.

WECA has contracted with G/FLRPC to fulfill the duties of Main Street Program Coordinator for the Western Erie Canal Heritage Corridor. The intent of the Western Erie Canal Heritage Corridor Main Street Program is to revitalize historic business centers along the heritage corridor, following the model of the National Trust Main Street Center™, a division of the National Trust for Historic Preservation. Not only will the Western Erie Canal Heritage Corridor Main Street Program provide high-quality training and technical assistance services to the sixteen villages and small cities that make up the 136-mile section of the canal in Western New York, but one village/small city in each of the counties of Niagara, Orleans, and Wayne will be selected to receive financial support for intensive planning work for the revitalization of its main street.

4.12 Cornell Agriculture and Food Technology Park

The Cornell Agriculture and 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. The Technology Farm is closely related to and heavily supports the region's emerging agribusiness and food processing industry cluster. 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. 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 Technology Farm was named Intelligent Facility of the Year by the Intelligent Community Forum in a highly competitive, international awards process. Currently, there are thirteen businesses calling Flex Tech I their home and the facility is at 80% occupancy.

4.13 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 community centers program and the Preparing Village Main Streets for Planning project and the aforementioned Western Erie Canal Heritage Corridor Main Street Program.

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

Chapter 5 - Development Actions, Efforts and Priorities

The following section itemizes the actions, efforts and priorities of the economic development/industrial development agencies and planning departments in the District. The work program, which is in the latter part of this document, provides an active plan to support, assist and supplement these efforts to further economic development in the District.

Regional partnerships between these public agencies and private sector organizations such as Greater Rochester Enterprise and Excell Partners, as well as the existing regional cooperative effort of Finger Lakes Wired, will contribute to the implementation and realization of CEDS projects and the CEDS plan of action and work program. G/FLRPC and the county economic development and industrial development agencies have a history of cooperation with organizations such as Greater Rochester Enterprise, Finger Lakes Wired, and local chambers of commerce that are certain to be valuable in project and program implementation.

A listing of priority projects for 2008 are presented in chart format along with associated sources and amounts of funding, lead agency on the project and estimated number of jobs to be created as a result of the project.

5.1 Genesee-Finger Lakes Region

A comprehensive understanding of the region's existing water and sewer, transportation, and telecommunications infrastructure is critical to advancing economic development and business and job growth in a manner that makes efficient use of existing natural and physical resources and infrastructure. While an inventory of the region's existing sewer and water infrastructure is currently underway and the region's transportation infrastructure has been well cataloged and assessed, a region-wide telecommunications inventory and assessment is the outstanding component of a full regional infrastructure analysis.

G/FLRPC is currently compiling existing and potential public sewer and water infrastructure, which involves 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. Once fully compiled, this inventory of existing sewer and water infrastructure will be shared with regional partners in an effort to assist particularly industrial development agencies in marketing sites for appropriate industrial and business developments.

Genesee Transportation Council has, as the region's Metropolitan Planning Organization, developed a thorough analysis of the existing transportation infrastructure in the region. 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. The LRTP details the region's transportation network, capacity, and usage and makes recommendations for

transportation upgrades and improvements so as to ensure the fluid movement of goods and persons and coordination between economic development projects and transportation access.

In addition to sewer, water, and transportation, the other regional infrastructure component is telecommunications. 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 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 three 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. Parties representing these clusters have 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 endorses is the development of a regional economic development analysis and benchmarking study. This study would include in-depth data development, collection and analysis on all facets of economic development ranging from regional organizational capacity to advanced econometrics measures. This would produce the most thorough analysis of the region to date as it would incorporate primary data collection through survey, focus groups, personal interviews and advanced statistical techniques to study socio-economic and demographic information. In addition, benchmarking of the region against its peers will be done and those measures will be available for use in the future.

Table 22 - 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 2.2 million people – this broader upstate New York region rivals the size, capabilities and capacity of the Pittsburgh MSA. Given Genesee County’s centrality in this broader regional construct, promise and opportunity avail themselves as a community to own and operate businesses, as well as providing an outstanding quality of life in which to live, work and play. Well situated, within a two hour drive of 9 million residents as a part of the “Golden Horseshoe” region, which encompasses the Buffalo Niagara, Rochester Finger Lakes, Syracuse and Southern Ontario Canada (Toronto) regions – Genesee County and the Batavia Micropolitan area offers several key competitive strengths as a business location including being awarded the designation as the fastest growing “Micropolitan” community in the Northeast for the third straight year in terms of economic development projects as ranked by Site Selection Magazine. This is the fourth year in a row that the Batavia Micropolitan area (Genesee County) has ranked in the top ten in the nation according to Site Selection Magazine.

Genesee County’s competitive strengths include its strategically located geography with outstanding highway and air access which includes three interchange exits within the county located along one of the states most active commercial highways - the New York State Thruway (I-90); an ample and well educated workforce; abundant and cost effective

real estate including three shovel-ready corporate/industrial parks along with two new “Industry Focused” business parks breaking ground during 2008 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 and the Genesee Valley Agri-Business Park, a one of a kind, 200+ acre park dedicated to food processing; as well as plans for 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, 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 the Genesee Community College, recently ranked 17th nationally in terms of growth; a diverse array of entertainment (Darien Lake theme park) and attractions (Niagara Falls, professional sports teams) available regionally and locally and very affordable housing. These competitive strengths contribute to enabling a high quality of life for Genesee County residents and their families.

As a result of challenging economic times during late 2000-2002, which certainly impacted Genesee County’s economic base including the manufacturing core, there has been a renewed sense of urgency among business, community and economic development leaders to leverage the region’s and community’s assets in order to stimulate economic development in upstate New York. 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%. A new 5 year strategic plan will be developed in 2008 or early 2009.

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

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

Mission: Genesee County’s community-based economic development mission focuses on catalyzing community economic success through growth, expansion and retention of the existing base of businesses as well as marketing the community as a “business-

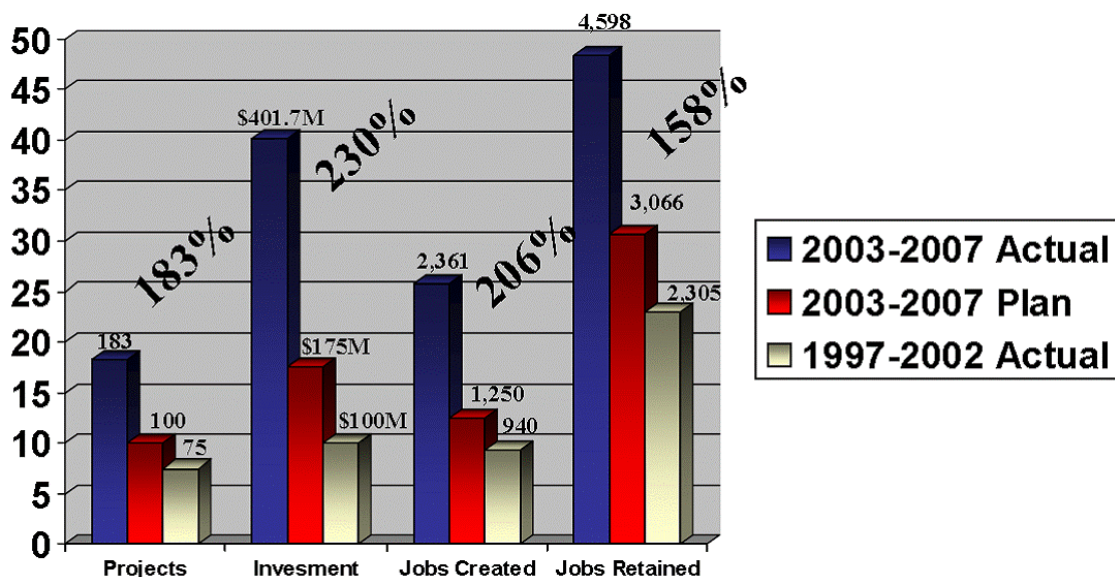
friendly” climate fostering new business attraction both in terms of start-ups and established firms.

The economic development vision and mission is being delivered successfully by focusing on the implementation of the plan’s strategic imperatives. During the five year period from 2003 through 2007, Genesee County’s economic development strategy, defined through its strategic imperatives, has performed the following economic development projects and initiatives:

1. Secured \$401.7 million in capital investment county-wide (230% of plan)
2. Participated in 183 economic development projects supporting the expansion and retention of the existing business base and new business attractions (277% of plan)
3. Job creation of 2,574 jobs (206% 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 for operation of and infrastructure for a 200+ acre park dedicated to Agri-Business 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 Apple Tree Acres
7. Developed four new corporate/industrial parks to potentially include:
 - Medical Technology Park
 - Agri-Business Park
 - Batavia Area Corporate Park (I-90): next generation Gateway Corporate Park
 - Pembroke Area Corporate Park (I-90)
8. Developed regional inter-municipal partnerships: “Opportunity Zones”
 - Leverage 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

The economic development scorecard focused on successes relative to the community economic development strategy and strategic imperatives. The cumulative scorecard results are illustrated below:



As one can see by the scorecard, strong economic development success continues throughout Genesee County and the Batavia Micropolitan area. The county's five year growth oriented plan greatly surpassed its objectives.

Genesee County's priority projects, enabling the county's economic development strategic plan and associated strategic imperatives, are listed in Table 23.

Table 23 - 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	Develop shovel-ready Ag-Mfg Park	GCEDC/ GGLDC	\$6 Million Federal, State, Local, Private	1,080
G-2	The Upstate Med-Tech Project: Develop a Regional Med-Tech Business Park and Commercialization Center	GCEDC/ GGLDC	Park: \$1.5-2.0M, Commercialization Center: \$3-\$4 Million Federal, State, Local	400
G-3	Develop Mega-Site Industrial Park supporting large scale Advanced Mfg	GCEDC/ GGLDC	\$20-\$25 Million Federal, State, Local	>2,000
G-4	Enhance Pembroke Commerce Park @I90 exit 48A	GCEDC/ GGLDC	\$1.5-2.0 Million Federal, State, Local	180
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): Cogen, Alt Energy to address high cost of power issues for business	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 and one in Avon have also been designated as Build Now - NY "shovel ready" sites. Business attraction efforts to these and other privately held sites throughout Livingston County 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 has completed construction of a new 310,000 square foot manufacturing and warehousing operation in Avon. The attraction of Barilla America further enhances the county's strategic food and beverage industry cluster which 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 agri-business comprise a large portion of the county economy and continuing efforts are underway to strengthen these industries as changing technology continues to impact them. The dairy industry has changed dramatically over the past few years as individual, locally owned operations have been forced to expand and increase the use of technology in order to keep up with larger agri-corporations. The county completed its Agriculture and Farmland Protection Plan in 2006 which identifies the need to strengthen agricultural-based economic development.

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

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.

The Livonia Gateway Project is a proposed road from NYS Route 15 to Bronson Hill Road in the Town of Livonia. 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 land-owners 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. 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. The Alliance is working toward self-sustainability and expansion of their geographic footprint.

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 which now houses several small manufacturing operations including LMC Power Systems, and American Motive Power which 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 Hamptons 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.

Genesee Valley BOCES offers a wide range of adult educational services from its Mt. Morris campus. Genesee Community College has campus center locations in Dansville and Lakeville. Both locations offer continuing education and training within the county.

The Livingston Area Transportation System (LATS), the county's public transit system, is a subsidiary of the Rochester Genesee Regional Transportation Authority (RGRTA). LATS, formerly a demand response system, transitioned to a fixed-route transit system for the purpose of moving people to and from employment centers in Livingston and

Monroe Counties. RGRTA also operates commuter buses transporting Livingston County residents to Monroe County for employment, medical and other services. Another example of stronger alignment between the two counties is the purchase of water from Hemlock Lake by Livingston County from the City of Rochester's Water Bureau.

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

Livingston County undertook the renovation of the central portion of the facility for an outpatient Kidney Dialysis Center to be operated in conjunction with Noyes Memorial Hospital and became fully operational in April 2008, serving those county residents in need of dialysis services.

Modern health care, however, is much more than physical facilities. Telecommunication capabilities and the ability to access data from any location are major components of the modern health care industry. Livingston County currently has sophisticated telecommunication data distribution/access capabilities as a result of multiple projects with other county agencies and municipalities. The E-911 public safety radio system and cooperative local addressing agreement with the county Sheriff's Office has resulted in the development and expansion of telecommunications in Livingston County. However, as with other counties, the question of connectivity is still prominent and the county is in the process of determining where telecommunications infrastructure is present, where it needs to be expanded and where it is lacking.

Livingston County's priority projects are listed in Table 24 below.

Table 24 - 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	TBD TBD	TBD
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	Multi-Tenant building at Mt. Morris Industrial Park	Livingston County IDA	\$2 million EDA, New York State, County, Private	25
L-6	Broadband Technology	Livingston County ITS	TBD TBD	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, printing, biotechnology and plastics manufacturing) as well as business services, including Information Technology, Management Information Systems, and call centers.

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

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

The addition of an Empire Zone to Monroe County in 2002 has been another tool to help with attracting greater interest from out of state companies. The county has five contiguous sites that are in the Empire Zone. These locations are Rochester Tech Park in Gates, Medley Centre in Irondequoit, KPS/Kodak Park in Greece, the former Kleen Brite location in Brockport and the Lennox Tech Center in Henrietta.

In 2005, Monroe County enhanced its marketing agreement with the Greater Rochester Enterprise (GRE), a public/private partnership established to professionally market the Rochester Metropolitan Area as a competitive, high-profile region for business location and growth. The county invested an additional \$300,000 in GRE which will allow the group to market outside of the community. 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 replicating the on-going efforts of state, regional and local partners.

Supporting Activities and Infrastructure

Monroe County's institutes of higher education have committed resources during the past several years to create institutional structures that support expanded research, technology transfer and industry support in research and development and workforce development. The University of Rochester has completed a five year, \$500 million expansion of the University's medical research arm, including the recruitment of faculty, staff and researchers. Both the University of Rochester and Rochester Institute of Technology have embarked on significant programs which address biotechnology. These investments and numerous others in the planning or development stages are key components for the region's future economic successes.

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

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

In an attempt to increase the amount of out-of-area visitors and spending, tourism resources are being targeted with a number of projects currently underway. Waterfront revitalization has become a priority with long-range plans being developed for the Erie Canal as a recreation and cultural attraction.

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

Renewable Energy for Economic Development

Monroe County is pursuing 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

Mill Street Landfill is a 95-acre landfill in Monroe County, adjacent to which is an industrial park. Mill Street Landfill is being transformed into an efficient bioreactor through the introduction of chemically-treated bio-solids as being demonstrated by the excess methane being flared. The proposed project will allow this excess methane to be converted to energy thereby allowing the county to offer electricity below market rate to prospective tenants at the adjacent industrial park. Monroe County will use this inexpensive electricity, as well as free thermal energy associated with the project, to entice companies to locate in 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. Once the process to capture methane is in place, the site will then 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. Related to the project, Monroe County anticipates a minimum private investment of \$65 million and the creation of 75 jobs in the next five years.

Monroe County's priority project is listed in Table 25.

Table 25 - Monroe County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
M-1	Mill Street 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 G-FL 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.

Midtown Plaza

In partnership with New York State, 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 primarily vacant office and retail buildings covering 8.6 acres. Through the condemnation process, the city will be acquiring the property in 2008. The city is currently relocating the few remaining tenants of the property and will begin closing a majority of the complex in July 2008. The \$55 million in asbestos removal and demolition of the buildings is being funded by New York State. Asbestos removal will begin in October 2008 and demolition is scheduled to commence in March 2009. The city has retained a consultant to prepare an Environmental Impact Statement and create a redevelopment plan for the site. PAETEC Holdings Corp. will be constructing its new 500,000 square foot, world headquarters building on a portion of the site and the remaining land will be sold for private development.

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) is being amended to incorporate the elements of its most recent master plan for the port. This LWRP amendment will include economic development goals and guidelines for the Port/Charlotte Community through a combination of mixed-use, waterfront, and recreation based development. Based on the recent master plan of the port area, the estimated maximum build out of the port area would include 300-700 new residential units, supported by 55,800 square feet of retail development and 6,000 square feet of office space. An important element of the plan is a new transient marina basin and facility. The city undertook a detailed marina study during 2008. If determined to be feasible based on market and demand analysis, the design and construction of a basin could cost \$8 to \$15 million. The city is also in the process of designing a central connecting section of River Street, which is scheduled for construction in 2009 and will facilitate new development east of Lake Avenue. In

addition, the city has increased terminal dock use by Great Lakes Cruise Vessels and issued new joint request for qualifications with the Toronto Port Authority for private ferry service providers. The maximum build out scenario has been projected to require \$150,000,000 in additional public and private investment.

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. 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 may result in the creation of 180 to 200 new jobs. Environmental cleanup is expected to be completed by late 2010.

Vacuum Oil Site

The Vacuum Oil site was a petroleum refinery and bulk storage facility approximately 24 acres in size and was located on the western bank of the Genesee River. The Vacuum Oil facility operated from the 1860s through the 1930s, and contained up to 135 storage tanks and process vessels and processed up to 4 million gallons of crude oil in the late 1800s. While a public trail way 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. 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 to investigate and clean up the site. Significant planning, design, and infrastructure investment will likely be needed to redevelop this large riverfront site. The city expects to need to make investments in strategic properties, improvements to the recreational

access to the Genesee River waterfront and associated public trails, and design and construct 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.

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 an industrial site with some contamination. All of the building structures have been removed. The city is attempting to find a suitable industrial or recreational re-use for the site, and expects to work with DuPont on the remaining remediation work required. The expected 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 in the former Emerson Street Landfill located on the north side of Emerson Street. There are 22 acres that are under consideration for industrial development, to support existing businesses in the area. The city is currently working with these businesses to assist in the redevelopment of this land. The expected completion date is 24-36 months. Project costs are unknown at this point.

The City of Rochester's priority projects are listed in Table 26 below.

Table 26- 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	180-200
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 2002, the Ontario County Office of Economic Development/Industrial Development Agency (OED/IDA) began the process of updating its strategic plan, which was initially completed in 1998. In 2004, the plan was submitted to and accepted by the Board of Supervisors. The 2004 update was named a Strategic Approach and identified the following:

Well-Developed Networks for Capital, Prospects and Public Relations

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

Talent

- Continually recruit talent as much as you recruit jobs

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

Sites That Are Flexible & Fully “Wired”

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

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

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

Strategy recommendations for Ontario County are:

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

Cornell Agriculture and Food Technology Park

One of the Ontario County 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 (Flex-Tech I) is open and offers offices, wet labs and pilot production facilities. Opened in late 2005, Flex-Tech I is now home to ten companies in a variety of enterprises. With Flex-Tech I currently at nearly 80% capacity and future growth limited by a lack additional square footage and service space (loading docks, warehousing & refrigerated storage), a new Flex-Tech II building is proposed to provide space for larger pilot operations, distribution functions and allow Flex-Tech I to be utilized, as intended, for the development of research grade laboratories. The construction of Flex-Tech II 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 in Flex-Tech I. The service operations would furthermore create incentives for future Park development from outside investors since vital distribution functions would be available within the Park. Ultimately, a Flex-Tech II could be responsible for creating hundreds of new jobs and 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 train and educate local employees for careers in occupations generated by the tech park.

Finger Lakes New Knowledge Network

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

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

Ontario County Technology Network

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

One possible component of "Ontario County Technology Network" is a project which may include a seven mile sanitary sewer line extension, landfill methane gas conveyance pipeline, multi-acre hydroponic greenhouse, centralized manure and food waste digester and a fiber optical communication cable. It is anticipated that the sewer line extension part of this project could connect the Finger Lakes BOCES, the Ontario County Landfill Development Zone to the Cornell Technology Farm, the Hamlet of Flint, and the Towns

of Seneca and Geneva. Positive outcomes of the project, in addition to increased connectivity, are likely to include job growth through the greenhouse project, lower costs of energy through the recovery of landfill bio-gases and waste heat, more efficient waste management for local companies, and bio-engineering and food process development through the hydroponic facility. The estimated cost of this component is \$9.2 million and over half of the funding has been committed by a private sector firm. The final implementation details of this component, however, have yet to be finalized.

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

The Finger Lakes Regional Fiber Infrastructure Project was developed from the findings of the study. This project will create a regional open access fiber optic ring that will consist of 173 miles and 144 strands of fiber. It will connect the following type of institutions: education, healthcare, public safety, government and research and development. This will enhance connections and the economic development infrastructure in Ontario County and the region. There could be an opportunity for and interest has been shown in connecting to the Monroe County Municipal Network, the New York State Education Network, BOCES Regional Information Center (Wayne County), Independent Optical Network (Phelps node connects to NYC and Toronto), National LambdaRail/Internet2 (an education and high end research network), Yates County and the Seneca County Public/Private network (which would serve as a connection to Cornell University). The ring would also connect two of the more important research institutions in Ontario County, the Cornell Technology Farm and the Infotonics Technology Center.

The Ontario County Board of Supervisors recently authorized the formation of a Local Development Corporation (LDC) and had the first meeting for its board of directors. The optic ring LDC will be a stand alone corporation that is operated independent of the government. The LDC will contract with the private sector to build, operate and maintain the infrastructure. In addition, the fiber will be open to all for lease and will be a backbone fiber only, with no service provision so as not to compete with the private sector. The cost of the fiber optic ring is \$7.2 million and \$2 million has already been authorized. One segment of the eventual 173 mile ring is under construction.

The last component of "Ontario County Technology Network" is the Infotonics Commercialization Center (ICC) which is an affiliate of the Infotonics Technology Center, a New York State Center of Excellence. The Infotonics Technology Center, a 501(c)(3) corporation, is a collaborative effort with numerous universities and colleges in New York State, Corning, Eastman Kodak Company and Xerox Corporation, and the

state and federal government. The purpose of the center is to attract, retain and develop talent, promote regional collaboration between industries, universities and government, boost the regional economy, and create a world-class photonics and microsystems prototype product facility.

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

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

These resources would be available to both those involved with the Infotonics Center, as well as serve as a traditional incubator for other high-technology businesses. ICC will be housed in a new building that will be located across from the Infotonics Center. The building will have office space for high-technology start-up and spin-off companies and related parties, such as venture capitalists and support staff, a state of the art communications system, shared use lab space, 250 seat auditorium and knowledge-worker attraction amenities. In addition, some of the space will be available for public use by the surrounding communities.

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

Ontario County’s priority project is listed in Table 27

Table 27 - 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 Flex-Tech II building	Ontario County OED/IDA	\$3,500,000 New York State, EDA	TBD

5.7 Orleans County

Orleans County encompasses 396 square miles with a population of 44,000 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 to I-190 in western edge of Niagara County.

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 I – 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 located within the area serviced by public utilities.

Assets:

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

Targeted Business Sectors:

- Agricultural users and byproducts
- Canadian manufacturing subsidiaries

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

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

This area is adjacent to a rail line and is located only four miles 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 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) uses many government agencies to assemble a wide range of incentives and benefits to assist businesses in retention and job creation. 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 28.

Table 28 - 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	Road Access to Medina Park	County of Orleans IDA	\$400,000 TBD	0
OR-3	Virtual Building- Albion Park	Village of Medina	\$60,000 TBD	100

5.8 Seneca County

Seneca Army Depot

A focal point of the Seneca County IDA's efforts over the past 11 years has been the reuse of the former Seneca Army Depot. The Five Points Correctional Facility at the

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

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

Continued environmental remediation needs to be done on the bulk of the Depot; namely locating and removing possible unexploded ordnance. There have been proposals to use this area for conservation and recreation, as well as other potential economic uses once the area is deemed cleared of any such ordnance. The Army is responsible for maintenance of the security fences and management of the deer herd at the base until environmental remediation has been completed, now estimated to be the year 2012. The area contains the world's largest herd of white deer.

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

The IDA has just completed a study of the former 7,000 foot Seneca Army Airfield. The study findings indicate that a significant level of capital expenditures would be required to open and operate the Depot airfield as a county airport and its use as a public airport is not recommended. The study also found that a part-time or full-time security training

operation by a government, military, or commercial organization would be the best potential for the facility. To this end, the IDA is already dealing with a number of interested training organizations including Fort Drum and the Navy Warfare Office.

Other Seneca County Development Activities

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

The IDA is working with involved municipalities to extend additional infrastructure in the Route 318/414 development corridor and to improve the connecting infrastructure to adequately serve new growth. Additionally, the IDA is working closely with the owners of Seneca Meadows Landfill on Route 414 in developing a renewable energy industrial park that will utilize low cost energy being produced by the processing of methane from the landfill. Construction is now underway on a facility housing a number of electric generators that will be fueled by methane. A major producer of hydroponic tomatoes has already decided to place a 30-acre green house at the park and is expected to create over 100 jobs. The IDA will use PILOT increment financing to move a major gas line as part of this project.

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

The IDA continues to market its forty acre Deer Run Corporate Park in Seneca Falls and is expected to attract at least two firms to the park over the next year. The park's first tenant, The Blade Shop, just completed construction on a new manufacturing facility that

will produce industrial mixing blades. A spec building is also being considered for the park.

Agriculture and Tourism

Agriculture and associated agribusiness continue to expand, primarily in the southern portion of Seneca County - occupying 65% of the land area in Seneca County. The IDA is working with a group of agri-business investors planning to site a large ethanol plant and bio-mass facility that will require thousands of acres of willow trees and switch grass. Currently, environmental and financial reviews are underway for this project. This \$135 million is expected to generate some 150 new jobs and significant demand for corn grown in the region. Spin-off development activity involving bio-technology is also expected as a result of the project.

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

Seneca County is working to enhance its tourism industry. Seneca County Department of Economic Planning and Development serves as the local tourism agency marketing the area's attractions. The county is currently seeking to increase the types and quality of attractions available in the county. For example, the county and the IDA are assisting the Seneca Knit Development Development Corp. in rehabilitating the former Seneca Knit Building into a new home for the National Women's Hall of Fame along with an adjacent hotel abutting the Seneca-Cayuga Canal.

Small Business

Small businesses and start-ups account for a significant portion of the growth in the county's overall economy. The Seneca County IDA and the county's Economic Development and Planning Office offer several loan funds to qualified small businesses and micro-enterprises. Additionally, business development services are offered through a Micro-Enterprise Development Program designed to address the opportunities and needs of Seneca County firms. Over 55 firms were assisted in the past year.

Airport and Other Facilities

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

Strategic Planning

The Seneca County IDA, Seneca County government, and the Seneca County Chamber of Commerce will shortly initiate an update to the county's Economic Diversification and Development Action Strategy. Completed in 1997, this strategy has been a valuable guide that has shaped the community's economic development efforts over the past 10 years. However, it is dated and needs considerable work to ensure that the county is taking the most appropriate actions and strategies to capitalize on its economic development strengths and create new growth opportunities. The planning process will involve a team of consultants and considerable input from community leaders and the citizenry at large.

Seneca County priority projects are listed in Table 29.

Table 29 - Seneca County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
S-1	Route 318 Sewer Expansion/Upgrades to Connections	TBD	\$4.5 Million EDA, NYS, local	TBD
S-2	Micro-Enterprise Program	TBD	\$400,000 EDA/HUD	TBD
S-3	Multi-Tenant Speculation Building/ Deer Run Park	TBD	\$1 Million EDA, local	TBD
S-4	Infrastructure Improvements at the Seneca Army Depot – water, sewer, roads, rail and drainage	TBD	\$12 Million EDA, NYS	TBD
S-5	Demolition of derelict and unneeded buildings and facilities at the Seneca Army Depot	TBD	\$5.5 Million EDA, NYS	TBD
S-6	Electrical Upgrade – Seneca Army Depot	TBD	\$8.0 Million EDA	TBD
S-7	Seneca County Strategic 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 and food production facilities along with a host of other types of manufacturing characterize the largest portion of Wayne County's

economic base. A cluster of optical and plastics technology driven companies are located in the Town of Ontario. Expectations are that this cluster will grow over the next three to seven years. Agriculture and the related agribusiness sector form another key component of economic activity in the county. A number of industries are involved in bio technology, particularly in relation to animal vaccines, foods and training. It is expected that these industries, along with alternative energy industries, will grow over the next five years, with the agricultural industry strengthening in food production as well as possibly doubling production in order to grow crops for energy production.

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

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

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

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

In autumn of 2006 the Wayne County IDA obtained acreage in the Town of Ontario, contiguous to the industry model mentioned above. This site is currently being developed as the hub for a system of WISP pods across the county. A sustainable energy industrial park would position Wayne County as a leader in the field of innovative economic development solutions. This project will serve as an example for others to follow, perhaps leading to a renaissance of job opportunities in this region. Wayne County will clearly demonstrate that respect for the environment and aggressive economic development can coexist. The cost for the establishment of a sustainable industrial park in the county is estimated to be \$2.5 million. Over the next several years this hub for sustainable industry will be developed with pods serviced by a variety of alternative energy resources—bio-diesel, wind power, glycerin generators, geo-thermal—located at industrial parks and sites throughout the county. The Wayne County IDA, with the Wayne Industrial Sustainability Park, LDC, private industry advocates, developers of alternative energy resources and area residents who have formed the Wayne County Wind Energy Task Force, continue to create an information, advocacy and development network for the support of the alternative energy industry.

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

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

A continuing top infrastructure priority of the Wayne County IDA is the development of an access road to industrial land north of Route 104 and the Ontario Midland Railroad between Lincoln Road and Dean Parkway in the Town of Ontario. Currently, the Beh industrial area is serviced on the incomplete Dean Parkway, an access road intersecting Route 104. Route 104 is a divided four-lane, east/west principal arterial road with Ontario-Midland Railroad tracks running parallel to the north of Route 104 through the

Beh Industrial Park site and other industrially zoned land. Plans have been developed to extend Lincoln Road (which runs perpendicular to Route 104 to the east of Dean Parkway) across the railroad tracks connecting it with a western extension of Dean Parkway to form a completed access road through the industrial area. Local residents and businesses support the plan as it will decrease the number of vehicles that are now required to make U-turns to access the Beh Industrial Park when heading east in the southern lane of Route 104 and eliminate several driveways that need to cross the railroad.

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

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

Wayne County is home to the Williamson-Sodus Airport in the Town of Sodus. For many years it has served as an overflow site for the Greater Rochester International Airport, should such a facility be needed. With the ease of private flying in the industry sector, there is support for expanding the airport to serve more and larger private 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, a station to connect the Finger Lakes/Lake Ontario region of Central and Western New York with such service, mid-way between Rochester and Syracuse. Grants totaling \$1,020,000 have been secured for this project by Senator Michael Nozzolio, but a funding gap of over \$1 million remains. This project has the potential of connecting tourists arriving via New York City or Toronto with rail access to Finger Lakes wine country, Erie Canal country and Lake Ontario through the Village of Lyons, providing an impressive regional impact for travelers at a time when automobile travel is becoming significantly more costly.

Work on development of a strategic plan for economic development within the county is complete; led by the Wayne County IDA, the Empire Zone Administration Board and the Wayne Economic Development Corporation, with Wayne County Board of Supervisors support, the plan was adopted by the Wayne County Board of Supervisors in November 2006.

One strategic plan priority is for Wayne County Industrial Parks to be upgraded to Build Now New York sites, if not by actual state certification, by meeting the requirements so that new businesses can be assured of smooth, swift processing of applications and permits. Engineering costs to achieve this will be considerable, as such, the expectation is that upgrades will be done over the next three years for the existing eleven parks and an additional three to five sites.

Wayne County priority projects are listed in Table 30.

Table 30 - Wayne County Priorities				
Priority Number	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	Wayne County IDA	\$2.5 Million Federal, State, IDA, Private	TBD
WA-2	Water Improvements Wolcott-WC NE Quadrant	Wayne County	\$3.7 Million Federal, State, Private	TBD
WA-3	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-4	Industrial Road-Town of Ontario Road Extension for Clyde Industrial Park	Wayne County IDA	\$5 Million TBD	TBD
WA-5	Amtrak Station- Lyons	Wayne County	\$1.5 Million Multiple	TBD

5.10 Wyoming County

During 2007 and 2008, Wyoming County's economy continued its emergence from the negative impacts caused by national economic downturns in the early part of this decade. Powerful forces such as productivity gains in agriculture and manufacturing and relentless competition in commodity markets have caused widespread consolidation in these two key economic sectors. These continuing global trends have caused the county

to focus its efforts on the challenging task of rebuilding and diversifying the local economy.

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

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

- Continuing to contract 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.
- Significant funds will be committed by the Board of Supervisors to support real estate and infrastructure development projects.
- Wyoming County received Empire Zone designation in 2006 and the county, through its established Zone Administrative Board, is actively promoting the tax incentives and benefits available to companies that locate within the boundaries of the Empire Zone to create new jobs.
- Wyoming County continues to seek awards for economic development grants 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 2006 there were 720 farms, consisting of 210,800 acres, whose actual crops and livestock cash receipts totaled \$191,846,000.

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 “new economy” businesses.

As information technology continues to develop, rural America may overcome its locational disadvantage. However, rural areas must provide natural amenities, good schools, transportation access, and other infrastructure service components to attract, recruit and retain “new economy” employers. 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. This 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. 70% to 80% of all business growth will come from expanding/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. The site is located in the 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 of the existing rail line into the site to facilitate more efficient and effective transport of materials, as well as, build a warehouse/storage dock platform for more companies to utilize the rail line as diesel gas prices continue to climb. The platform would be of interest to another similar sandblasting company that has expressed interest in the site and could potentially create upwards of sixty new jobs. The creation of a new rail spur would certainly significantly increase the attractiveness and

usefulness of the site. The WCIDA continues to work on closing a \$170,000 funding gap that still exists for rail improvement. The infill redevelopment of brownfield sites in the village center business district corridors to increase adjacent property values and protect residential uses and the agricultural industry against sprawl is a priority, as well as, capitalizing on the tourism industry that is attracted to and visits Letchworth State Park each year.

Infrastructure construction is almost completed at the Arcade Business Park as water and wastewater have already been extended to the site which is owned by the WCIDA. Attracting a designated developer for the business park will soon be underway. 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. The County also lacks shovel ready development sites and buildings.

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

Wyoming County priority projects listed below in Table 31.

Table 31 - Wyoming County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
WY-1	Westinghouse Site Improvements Attica	Wyoming County IDA	\$1.5 Million USEPA, NYSDEC, Local	25
WY-2	Perry Business and Technology Park	Wyoming County Business Center	\$2.2 Million EDA, USDA, Local	100
WY-3	County Telecommunications, Fiber Optic & Cell Tower Improvements	Wyoming County Planning & Development	TBD TBD	0
WY-4	Business Incubator Facility	Wyoming County Planning & Development	\$1.0 Million USDA, GOSC, Local	50
WY-5	Tri-County Business Park	Village of Arcade	\$4.0 Million EDA, USDA	TBD

WY-6	North Main Street Sewer Extension-Warsaw	Village of Warsaw	\$850,000 EFC, USDA	0
WY-7	Redevelopment of A&A Facility in Perry	Wyoming County Business Center	TBD NYSDEC, USDA, EDA, Local	TBD
WY-8	Redevelopment of Broeder Machine Building in South Warsaw	Wyoming County Business Center	TBD NYSDEC, USDA, EDA, Local	TBD
WY-9	Medical Mall Professional Services Building in Attica	Wyoming County Planning & Development	TBD TBD	TBD
WY-10	Bioenergy Manure Digester Processing Co-op in Perry	Village of Perry	\$4.5 Million NYSERDA, USDA	5
WY-11	Koike Aronson Railroad Improvement Project in Arcade	Wyoming County IDA	TBD TBD	25
WY-12	Boxlers Dairy Farm Agritourism Project in Orangeville	Wyoming County IDA	\$4.0 Million TBD	10
WY-13	Silver Lake Country Club Redevelopment Project in Castile	Village of Castile	TBD TBD	12

5.11 Yates County

Yates County has developed a diverse economic base, with no single dominant sector. High-tech and the traditional local businesses continue to grow and expand, as does the tourism industry and agriculture. Employment opportunities in the public sector, such as education and local government also continue to be an important component of the local economy. Yates County is in the heart of the Finger Lakes and offers many natural amenities creating a high quality of life attraction.

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

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 Drugs in Penn Yan and improved tenancy in Lake Street Plaza. Also, a formerly vacant 15,000 square foot industrial building was occupied by a chemical manufacturing firm. Many of these projects represent highly visible improvements in the gateways to Penn Yan and expanding investment in the area.

The appeal of the Finger Lakes region 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 2005 opening of the Best Western Vineyard Inn & Suites in downtown Penn Yan has added much needed lodging and has already obtained occupancy rates well above predicted levels.

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

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

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

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

All of these infrastructure projects will provide needed services to existing residents, businesses and others, as well as provide for future development. They also play an important role in the protection of the Keuka and Seneca Lake watershed areas from

pressures created by increased development. The county's economic development strategy will be to promote and assist in the review of municipal plans and development policies in order to foster future development and protect the quality of life of the area.

The development of the Penn Yan waterfront area will be a major public/private initiative for the community in 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 has completed an RFP process and selected a consultant to lead the effort.

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.

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

Yates County's priority projects are shown in Table 32 below.

Table 32 - 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	Upgrade Himrod Water District & Ext. #1, Milo	Yates County IDA	\$2,850,000 NYS EFC DWSRF, Local	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	Yates County Airport Taxiway and Runway Expansion	Yates County IDA	\$4,000,000 FAA, NYS, County	TBD
Y-5	Branchport/West Bluff Drive Sewer District , Jerusalem	Yates County IDA	\$7,175,000 NYS EFC CWSRF	TBD
Y-6	Torrey Water District #1 , Torrey	Yates County IDA	\$4,000,000 NYS EFC DWSRF, USDA, EDA, Local	TBD
Y-7	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 9 and 10.

6.2 Goals, Objectives, Strategies and Measures

The goals, strategies, and measures were developed based on both the stakeholder input sessions and discussions held with the nine county Economic Development Departments/Industrial Development Agencies, Planning Departments and other various stakeholders. A copy of the notes from those meetings can be found in Appendix 11.

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 Number of jobs created and retained
To continue to work in partnerships on different programs and initiatives	<ul style="list-style-type: none"> Continue to foster relationships with public and private sector partners to build public private partnerships and collaborate on projects Seek out new partners for G/FLRPC's programs and initiatives Work with and support any regional and/or county programs or initiatives 	<ul style="list-style-type: none"> Number and diversity of new partnerships and collaborations Number public and private partners G/FLRPC has in its programs and initiatives Amount of funding secured and leveraged Amount of private investment entering the region Number of jobs created and retained

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 implementation of the WIRED Finger Lakes Partnership Asset Mapping initiative 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 jobs created and retained
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 Development of a Infrastructure Regional Development Plan Development of a regional telecommunications inventory and assessment Development of a regional water and sewer inventory and assessment tool 	<ul style="list-style-type: none"> Support provided to GTC's programs A complete 9 county telecommunications inventory and assessment with GIS files A completed Infrastructure Regional Development Plan with an implementation strategy 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 Governing Board and Operations Team 	<ul style="list-style-type: none"> • Correspondence between G/FLRPC and the EDA regarding Finger Lakes Wired • Amount of funding leveraged through Finger Lakes Wired
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 Governing Board and Steering Committee 	<ul style="list-style-type: none"> • Job and investment measures associated with Finger Lakes WIRED, WIBS, TEN • Private sector leveraged investment

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 Operations Team of Finger Lakes Wired 	<ul style="list-style-type: none"> • Number of trained workforce • Number of jobs created and retained • Number of professional support inquiries
To prepare students (at the K-12 and community college level) for technical careers and in other competencies necessary to compete in a knowledge-based economy	<ul style="list-style-type: none"> • Work with K-12 schools, school counselors and community colleges to better prepare students for technical careers 	<ul style="list-style-type: none"> • Number and evaluation of k-12 initiatives

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 • Build funding for and collaboration among partners for rural projects, such as the Rural Entrepreneurship Collaboration and E-Commerce Initiative 	<ul style="list-style-type: none"> • Number of professional support inquiries • Secure funding for rural projects • Number of collaborations on rural projects
To increase the number and success of small businesses on main streets and at community centers	<ul style="list-style-type: none"> • Administer G/FLRPC's Community Centers program • Finalize the case study communities in the Preparing Village Main Streets for Planning program • Continue to partner with university centers to incorporate consumer demographic analysis into Main Street projects • Administer the Western Erie Canal Heritage Corridor Main Street Program • Continue to support the Livingston-Wyoming County Alliance for Business Growth • Continue to assess the Wayne County Economic Development Plan • Implementation of 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 • Amount of private sector leveraged investment • Number of jobs created and retained • Development and distribution of a Main Street Revitalization guidebook for local governments as part of the Preparing Village Main Streets for Planning program • Provision of planning services to municipalities participating in the Western Erie Canal Heritage Corridor 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 and Operations Team of Finger Lakes Wired 	<ul style="list-style-type: none"> • Amount of workforce training provided through Finger Lakes Wired • 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 • Continue the education process with private sector developers of financing options available for brownfield redevelopment and risk mitigation tools 	<ul style="list-style-type: none"> • Implementation of a NYS Brownfield Opportunity Areas program • Number of educational outreach events for private sector developers regarding brownfield redevelopment • Amount of private sector investment in brownfield sites
To encourage efficient land use and development patterns	<ul style="list-style-type: none"> • Ensure that comprehensive plans and regulations exist where needed • Build projects and funding to support local build out and fiscal analysis tools that promote fiscal health 	<ul style="list-style-type: none"> • Number of developed and/or revised comprehensive plans and implementation of comprehensive plans • Number of attendees at Spring and Fall Local Government Workshop • Amount of assistance provided 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 potential dissolutions of municipalities 	<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 and implementation of All-Hazard Mitigation Plans in Genesee, Livingston, Orleans, Wayne and Wyoming Counties

Goal VI – Enhance existing tourism opportunities and develop new recreation destinations and facilities		
Objective	Strategy	Measure
To further develop the Finger Lakes Region as a destination location	<ul style="list-style-type: none"> • Support the Finger Lakes wine industry and culinary artisanship • 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 through securing funding for a NYS blueways program • 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"> • Development of a Regional Blueways Inventory and Assessment • 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 • Administer the Western Erie Canal Heritage Corridor Main Street Program 	<ul style="list-style-type: none"> • Implementation Erie Canal related projects • Provision of planning services to municipalities participating in the Western Erie Canal Heritage Corridor 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 professional support inquiries • Number and diversity of new and existing partnerships in which G/FLRPC is involved • Number public and private partners G/FLRPC has in its programs and initiatives

To promote information sharing in the region	<ul style="list-style-type: none"> • Continue to use the EDAC/RDC 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 professional support inquiries • Number of jobs created and retained • 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"> • Number of jobs created and retained • Amount of private sector investment leveraged • Number of firms contacted and loans closed • Number of financial packages assembled to retain manufacturing firms

Goal IX – Strengthen Agriculture and Agri-business		
Objective	Strategy	Measure
To facilitate the integration of agriculture into the alternative fuel sector	<ul style="list-style-type: none"> • 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 • Number of jobs created and retained • Amount of 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"> • 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 • A completed Telecommunications Infrastructure Regional Development Plan • Amount of funding secured and leveraged for telecommunications infrastructure investments

Chapter 7 – 2008 Plan of Action

This section provides an overview of the activities that G/FLRPC will undertake in 2008 as a continuum of services provided in general under its Economic Development program.

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

7.1 Community and Business Development

- Continue to foster relationships and build partnerships with public, private and non-profit organizations and entities in the region.
 - Continue to cultivate relationships with commercial banks and other financial institutions to provide finance packaging and options for private sector investment.
 - Continue to advance the establishment of public/private partnerships in order to align the efforts of different organizations and further leverage public sector grants and investments.
- Continue to work with federal, state, regional and municipal partners, the private sector, colleges and universities and other research institutions to foster the innovation efforts, processes and products in the region.
 - Work on the development of commercialization centers that bring R&D to commercialization and the marketplace. Special attention should be paid to commercialization centers for optics, med-tech and alternative energy.
 - 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.
 - Develop 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.
 - Complete a regional telecommunications inventory and assessment for the remaining counties in the region that have not completed one with GIS files that accompany it.
 - Use the regional telecommunications inventory and assessment to develop a Regional Telecommunications Infrastructure Development Plan which will provide a strategy for building optic fiber and increasing bandwidth and redundancy throughout the entire region and to guide private sector investment in telecommunications throughout the region.
 - Provide assistance to the Genesee Transportation Council in gathering the appropriate data necessary to inform recommendations for their regional transportation documents.
 - Continue to provide assistance on the Long Range Transportation Plan, Transportation Improvement Program, Unified Planning Work Program, and Regional Goods Movements programs.
 - Develop revisions to the Transportation Analysis Zones (TAZ)
 - Continue to produce the annual Land Use Monitoring Report.
 - Continue to work with NYSERDA and other organizations to provide support to municipalities surrounding wind energy development.
 - Build projects and funding to support a regional inventory and assessment (telecommunications, sewer, water, energy, etc.)
- Continue to work with partners to enhance the region's ability to compete during the site selection process.
 - 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 the Brownfield Opportunities Area which facilitates the public and private sector working together to gain a better understanding of redevelopment options for brownfield sites and helps to garner private investment in brownfield sites.
- Support entrepreneurial activities and programs throughout the region.
 - Support the efforts of 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.
 - Incorporate consumer demographic analysis into Main Street projects and to identify other mutual aptitude areas that can be shared to benefit regional clients.

- Provide downtown and main street revitalization planning services to municipalities participating in the Western Erie Canal Heritage Corridor Main Street Program.
- Develop the region as a tourist destination.
 - Work with local tourist organizations to identify and capture opportunities such as the Erie Canal as economic stimulators in the region.
 - Continue to work on the development of the Erie Canal through serving on the NYS Canal Commission.
 - Develop a regional blueway trails initiative
 - Work with local partners to develop agri-tourism opportunities in the region

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 Wayne and Livingston Counties All-Hazard Mitigation Plans. G/FLRPC can continue to provide implementation assistance. G/FLRPC will continue to work with FEMA on the approval of the Genesee, Wyoming and Orleans Counties All-Hazard Mitigation Plans. By having these plans in place, the respective communities mentioned are in a better position to respond to disasters from a land use and economic development perspective.

- G/FLRPC will identify homeland security issues as they directly relate to economic development and land use. Planning processes and products will take this into consideration.
- G/FLRPC 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 all currently available data as received by G/FLRPC and analysis of major issues as they arise including population change and age-cohort analysis.
 - Requests will be submitted and filled for other types of data and information that is more specialized.
 - Partner with the New York State Data Center and university centers to deliver better data to regional stakeholders.

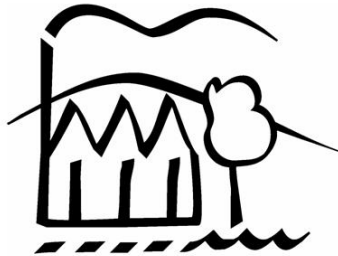
7.4 Coordination and Training

- 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)**

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

Table A-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	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 (2006)

Table A-4 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2006)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Crop Production	246	3,147	\$21,410	1.39	887
Animal Production	146	2,119	\$29,846	2.46	1,258
Forestry and Logging	10	69	\$27,759	0.27	-189
Agriculture & Forestry Support Activity	35	405	\$22,227	0.31	-890
Mining (except Oil and Gas)	39	623	\$39,728	0.69	-275
Utilities	21	2,044	\$84,863	0.91	-191
Construction of Buildings	840	5,242	\$44,442	0.72	-2,048
Heavy and Civil Engineering Construction	121	2,048	\$50,246	0.50	-2,008
Specialty Trade Contractors	1,786	11,690	\$41,827	0.59	-8,182
Food Manufacturing	121	5,745	\$38,751	0.96	-260
Beverage & Tobacco Product Manufacturing	40	1,636	\$78,145	2.07	846
Textile Mills	5	255	\$42,806	0.31	-573
Textile Product Mills	16	304	\$30,265	0.45	-369
Apparel Manufacturing	12	918	\$32,390	0.91	-90
Wood Product Manufacturing	56	763	\$30,429	0.33	-1,552
Paper Manufacturing	36	1,769	\$44,625	0.91	-167
Printing and Related Support Activities	153	3,212	\$40,803	1.23	602
Petroleum & Coal Products Manufacturing	8	106	\$47,510	0.23	-355
Chemical Manufacturing	35	15,509	\$69,612	4.39	11,976
Plastics & Rubber Products Manufacturing	86	5,815	\$38,855	1.77	2,532
Nonmetallic Mineral Product Mfg	58	1,768	\$42,884	0.84	-338
Primary Metal Manufacturing	12	488	\$42,601	0.26	-1,412
Fabricated Metal Product Manufacturing	319	9,099	\$42,028	1.45	2,811
Machinery Manufacturing	292	15,879	\$65,282	3.32	11,091
Computer and Electronic Product Mfg	109	8,153	\$64,117	1.53	2,820
Electrical Equipment and Appliances	25	1,488	\$48,106	0.84	-281
Transportation Equipment Manufacturing	31	5,577	\$53,666	0.77	-1,695
Furniture and Related Product Mfg	52	832	\$34,069	0.36	-1,474
Miscellaneous Manufacturing	113	4,979	\$55,824	1.87	2,316
Merchant Wholesalers, Durable Goods	833	11,150	\$56,244	0.89	-1,320
Merchant Wholesalers, Nondurable Goods	310	5,197	\$54,060	0.62	-3,141
Electronic Markets and Agents/Brokers	431	2,066	\$63,273	0.65	-1,103
Motor Vehicle and Parts Dealers	515	7,554	\$36,113	0.96	-275
Furniture and Home Furnishings Stores	192	1,629	\$26,606	0.67	-786
Electronics and Appliance Stores	201	1,841	\$31,033	0.80	-458
Building Material & Garden Supply Stores	332	5,371	\$28,512	0.99	-54
Food and Beverage Stores	597	17,482	\$17,898	1.52	5,963
Health and Personal Care Stores	277	3,351	\$27,731	0.85	-586
Gasoline Stations	399	3,247	\$17,508	0.92	-293
Clothing and Clothing Accessories Stores	484	5,020	\$14,227	0.84	-925
Sporting Goods/Hobby/Book/Music Stores	243	2,770	\$14,078	1.01	23
General Merchandise Stores	196	9,759	\$17,254	0.79	-2,586
Miscellaneous Store Retailers	401	3,004	\$16,460	0.82	-680
Nonstore Retailers	139	1,415	\$31,214	0.80	-359

Table A-4 – Establishments, Employment, Average Annual Wage, Location Quotients and Export Employment for the G-FL Region by Industry Subsector (2006) (continued)

Industry Subsector	Establishments	Employment	Average Annual Wage	Location Quotient	Export Employment
Air Transportation	14	265	\$40,003	0.13	-1,722
Truck Transportation	297	3,489	\$35,301	0.60	-2,317
Transit and Ground Passenger Transport	58	2,271	\$19,038	1.36	602
Pipeline Transportation	12	39	\$65,133	0.25	-119
Scenic and Sightseeing Transportation	6	33	\$21,096	0.30	-77
Support Activities for Transportation	69	780	\$35,602	0.34	-1,525
Couriers and Messengers	54	1,338	\$35,213	0.57	-1,018
Warehousing and Storage	56	1,552	\$31,330	0.61	-1,004
Publishing Industries	103	3,300	\$40,741	0.89	-390
Motion Picture & Sound Recording	51	549	\$16,759	0.35	-1,022
Broadcasting (except Internet)	24	978	\$40,883	0.73	-362
Telecommunications	108	4,814	\$67,510	1.21	829
ISPs, Search Portals, & Data Processing	70	1,068	\$60,284	0.68	-502
Other Information Services	45	287	\$15,290	1.38	79
Credit Intermediation & Related Activity	533	7,574	\$46,810	0.63	-4,373
Financial Investment & Related Activity	252	1,779	\$97,843	0.54	-1,520
Insurance Carriers & Related Activities	684	6,335	\$56,566	0.72	-2,466
Funds, Trusts & Other Financial Vehicles	13	83	\$92,538	0.22	-294
Real Estate	792	4,938	\$29,760	0.81	-1,124
Rental and Leasing Services	230	2,069	\$28,980	0.79	-545
Professional and Technical Services	2,585	23,877	\$50,957	0.81	-5,747
Management of Companies and Enterprises	172	11,832	\$76,559	1.62	4,526
Administrative and Support Services	1,201	23,878	\$26,990	0.73	-8,851
Waste Management and Remediation Service	87	1,359	\$43,354	0.96	-64
Educational Services	319	23,577	\$44,724	0.47	-26,693
Ambulatory Health Care Services	1,574	18,098	\$39,608	0.85	-3,310
Hospitals	16	23,842	\$40,153	1.10	2,100
Nursing and Residential Care Facilities	332	17,136	\$24,023	1.46	5,399
Social Assistance	637	13,235	\$21,650	1.49	4,374
Performing Arts and Spectator Sports	112	1,198	\$24,766	0.74	-417
Museums, Parks and Historical Sites	22	739	\$20,160	1.50	247
Amusement, Gambling & Recreation	345	6,072	\$14,680	1.10	544
Accommodation	162	3,889	\$18,937	0.53	-3,470
Food Services and Drinking Places	2,088	32,427	\$12,555	0.86	-5,403
Repair and Maintenance	816	4,535	\$29,363	0.89	-552
Personal and Laundry Services	664	4,696	\$19,527	0.89	-572
Membership Organizations & Associations	955	8,259	\$18,084	1.55	2,937
Private Households	358	521	\$16,932	0.25	-1,548
Federal Government	204	5,597	\$51,172	0.50	-5,564
State Government	97	14,423	\$48,806	0.77	-4,251
Local Government	639	69,010	\$37,098	1.22	12,487
Unclassified	1,012	1,183	\$21,484	1.18	181
Total, All Industries	28,255	545,462	\$38,575	-	-44,306
Total, All Private	27,315	456,909	\$38,321	-	-46,978

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	\$18,083	1.23	541
Animal Production	147	1,934	\$21,873	2.24	1,071
Forestry and Logging	5	68	\$27,825	0.21	-262
Agriculture & Forestry Support Activity	41	557	\$19,866	0.41	-791
Oil and Gas Extraction	3	16	\$53,533	0.03	-517
Mining (except Oil and Gas)	44	404	\$38,289	0.42	-554
Utilities	16	2,483	\$68,712	0.97	-81
Construction of Buildings	761	4,947	\$36,940	0.71	-2,016
Heavy and Civil Engineering Construction	127	1,993	\$43,764	0.46	-2,340
Specialty Trade Contractors	1,792	13,049	\$35,617	0.73	-4,933
Food Manufacturing	121	6,214	\$31,672	0.94	-409
Beverage & Tobacco Product Manufacturing	22	1,685	\$45,571	1.91	802
Textile Mills	7	282	\$41,705	0.17	-1,332
Textile Product Mills	17	328	\$24,508	0.36	-595
Apparel Manufacturing	16	1,032	\$26,215	0.49	-1,087
Wood Product Manufacturing	56	837	\$24,114	0.32	-1,777
Paper Manufacturing	43	2,265	\$34,488	0.88	-314
Printing and Related Support Activities	170	3,468	\$36,823	1.01	28
Petroleum & Coal Products Manufacturing	22	173	\$48,063	0.33	-352
Chemical Manufacturing	51	24,344	\$57,586	5.82	20,164
Plastics & Rubber Products Manufacturing	104	7,346	\$32,547	1.81	3,287
Nonmetallic Mineral Product Manufacturing	67	2,329	\$38,310	0.99	-34
Primary Metal Manufacturing	11	525	\$42,180	0.20	-2,127
Fabricated Metal Product Manufacturing	340	11,100	\$35,196	1.49	3,626
Machinery Manufacturing	330	22,446	\$54,467	3.62	16,242
Computer and Electronic Product Mfg	107	9,912	\$53,752	1.28	2,151
Electrical Equipment and Appliances	25	1,749	\$34,973	0.69	-771
Transportation Equipment Manufacturing	31	7,817	\$51,855	0.89	-948
Furniture and Related Product Manufacturing	60	772	\$27,927	0.27	-2,127
Miscellaneous Manufacturing	111	5,550	\$45,596	1.78	2,424
Merchant Wholesalers, Durable Goods	968	12,302	\$46,763	0.89	-1,559
Merchant Wholesalers, Nondurable Goods	352	5,391	\$40,931	0.61	-3,411
Electronic Markets and Agents/Brokers	367	1,431	\$53,066	0.54	-1,202
Motor Vehicle and Parts Dealers	507	7,640	\$32,802	0.97	-233
Furniture and Home Furnishings Stores	206	1,845	\$24,342	0.80	-471
Electronics and Appliance Stores	225	1,945	\$32,552	0.81	-461
Building Material & Garden Supply Stores	345	5,406	\$22,242	1.11	535
Food and Beverage Stores	594	18,309	\$13,700	1.43	5,548
Health and Personal Care Stores	283	3,630	\$19,277	0.92	-325
Gasoline Stations	479	3,810	\$14,590	0.95	-180
Clothing and Clothing Accessories Stores	522	4,849	\$12,620	0.86	-784
Sporting Goods/Hobby/Book/Music Stores	254	2,877	\$12,795	0.99	-43
General Merchandise Stores	162	9,508	\$14,987	0.79	-2,515
Miscellaneous Store Retailers	480	3,351	\$15,072	0.78	-943
Nonstore Retailers	128	2,406	\$25,410	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	\$44,695	0.14	-2,243
Truck Transportation	331	3,186	\$30,938	0.53	-2,807
Transit and Ground Passenger Transport	53	2,291	\$22,164	1.44	704
Pipeline Transportation	8	40	\$55,780	0.20	-156
Scenic and Sightseeing Transportation	7	35	\$17,308	0.30	-82
Support Activities for Transportation	66	687	\$26,475	0.30	-1,604
Couriers and Messengers	44	2,040	\$26,239	0.79	-544
Warehousing and Storage	44	677	\$27,349	0.31	-1,518
Publishing Industries	120	3,313	\$36,451	0.75	-1,098
Motion Picture & Sound Recording	69	994	\$12,330	0.61	-635
Broadcasting (except Internet)	25	980	\$35,960	0.67	-484
Internet Publishing and Broadcasting	5	90	\$49,910	0.42	-125
Telecommunications	102	5,443	\$71,677	1.01	61
ISPs, Search Portals, & Data Processing	95	1,823	\$45,245	0.84	-352
Other Information Services	41	293	\$12,296	1.49	96
Credit Intermediation & Related Activity	455	7,507	\$37,315	0.69	-3,357
Financial Investment & Related Activity	176	1,877	\$92,512	0.55	-1,554
Insurance Carriers & Related Activities	761	5,734	\$41,720	0.61	-3,733
Funds, Trusts & Other Financial Vehicles	11	72	\$40,519	0.20	-289
Real Estate	748	5,333	\$23,292	0.95	-262
Rental and Leasing Services	220	2,190	\$23,080	0.77	-654
Professional and Technical Services	2,497	23,941	\$44,660	0.83	-4,773
Management of Companies and Enterprises	131	10,948	\$61,404	1.43	3,290
Administrative and Support Services	1,135	25,562	\$20,340	0.77	-7,806
Waste Management and Remediation Service	70	1,223	\$34,575	0.92	-111
Educational Services	275	17,377	\$41,184	1.70	7,181
Ambulatory Health Care Services	1,528	18,254	\$30,102	0.99	-170
Hospitals	18	23,957	\$29,913	1.42	7,099
Nursing and Residential Care Facilities	270	14,333	\$20,611	1.30	3,319
Social Assistance	612	11,409	\$17,734	1.44	3,477
Performing Arts and Spectator Sports	125	1,108	\$25,592	0.68	-515
Museums, Parks and Historical Sites	20	747	\$16,433	1.59	276
Amusement, Gambling & Recreation	319	5,292	\$13,257	0.96	-229
Accommodation	143	4,571	\$16,300	0.57	-3,467
Food Services and Drinking Places	2,135	32,571	\$10,510	0.93	-2,343
Repair and Maintenance	776	4,063	\$26,112	0.77	-1,232
Personal and Laundry Services	684	4,292	\$16,593	0.81	-1,009
Membership Organizations & Associations	803	7,095	\$15,277	0.62	-4,346
Private Households	472	760	\$13,010	0.41	-1,089
Federal Government	191	5,463	\$41,430	0.45	-6,753
State Government	96	14,635	\$40,974	0.72	-5,777
Local Government	574	65,766	\$29,232	1.17	9,749
Unclassified	157	308	\$13,954	0.28	-778
Total, All Industries	27,211	561,926	\$32,818	-	-5,412
Total, All Private	26,350	476,062	\$32,964	-	-2,631

Source: Quarterly Census of Employment and Wages * Average Annual wage expressed in 2006 dollars

Appendix 6 - Change in Economic Indicators for the G-FL Region by Industry Sector (2000-2006)

Table A-6 – Change Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Sector (2000-2006)

Industry Sector	Change in Establishments		Change in Employment		Change in Average Annual Wage**	
	Number	Percent	Number	Percent	Dollars	Percent
Agriculture, Forestry, Fishing & Hunting	-23	-5%	237	4%	\$1,591	7%
Mining	-7	-18%	-19	-5%	-\$7,770	-17%
Construction	67	2%	-1,008	-5%	\$450	1%
Manufacturing	-128	-7%	-25,713	-23%	\$80	0%
Wholesale Trade	-112	-7%	-711	-4%	\$3,075	6%
Retail Trade	-211	-5%	-3,132	-5%	\$257	1%
Transportation and Warehousing	1	0%	442	5%	-\$1,383	-4%
Information	-47	-10%	-1,660	-13%	-\$5,781	-10%
Finance and Insurance	51	4%	-525	-3%	\$5,134	10%
Real Estate and Rental and Leasing	54	6%	-512	-7%	\$2,376	9%
Professional and Technical Services	88	4%	-65	0%	-\$1,293	-2%
Management of Companies and Enterprises	38	30%	780	7%	\$5,062	7%
Administrative and Waste Services	71	6%	-2,617	-10%	\$3,071	13%
Educational Services	45	17%	5,717	33%	-\$3,176	-7%
Health Care and Social Assistance	132	5%	4,358	6%	\$2,438	8%
Arts, Entertainment, and Recreation	14	3%	864	12%	-\$1,447	-8%
Accommodation and Food Services	-28	-1%	-825	-2%	\$108	1%
Other Services	61	2%	1,836	11%	\$50	0%
Total, All Government	79	9%	3,173	4%	\$2,426	6%
Unclassified	865	581%	891	304%	\$5,508	35%
Total, All Private	965	4%	-19,152	-4%	-\$247	-1%
Total, All Industries	1,044	4%	-15,979	-3%	\$178	0%

Source: Quarterly Census of Employment and Wages

** Average Annual wage expressed in 2006 dollars

Appendix 7 - Assumptions in Location Quotient Approach

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

Appendix 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 Workforce Investment Board
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




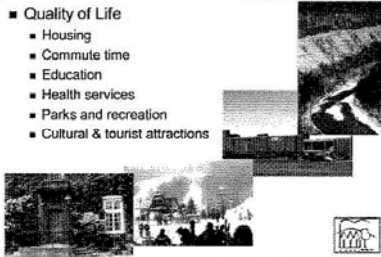
Snapshot of the Region

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




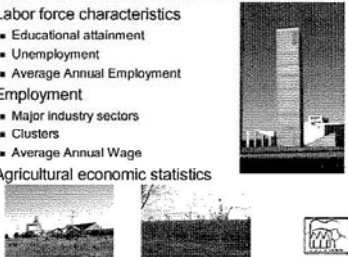
Snapshot of the Region

- 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
- Outmigration 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
- Regional 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