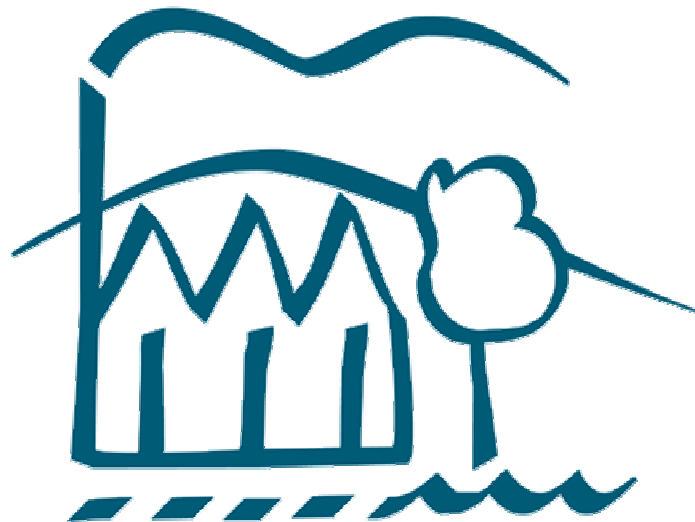

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update



GENESEE/FINGER LAKES
Regional Planning Council

2010-2011

Genesee-Finger Lakes Economic Development District

Comprehensive Economic Development Strategy Update

2010-2011



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

Mission Statement

The 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: 01-83-08854

Prepared by Genesee/Finger Lakes Regional Planning Council

RESOLUTION NO. 2011-10

GENESEE/FINGER LAKES REGIONAL PLANNING COUNCIL

RESOLUTION

APPROVING THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY UPDATE

WHEREAS,

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

NOW, THEREFORE, BE IT RESOLVED

1. That the Genesee/Finger Lakes Regional Planning Council does hereby accept and approve the CEDS Update.
2. That the Council does formally authorize the submission of the CEDS Update document to the Economic Development Administration.

September 8, 2011
Date

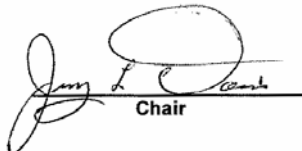

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Chapter 1 – Genesee-Finger Lakes Economic Development District

1.1 Introduction

The Genesee-Finger Lakes (G-FL) 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. The G/FLRPC economic development program also works in conjunction with other G/FLRPC program areas, which are discussed in greater detail in Chapter 7.

The CEDS provides an overview of the District's economic trends by incorporating current data from local, regional, state and federal sources. The document also details current economic development programs and activities as well as development actions and project priorities identified by members of the District. Economic development goals for the District are also identified and a plan of action to further strengthen the District's economy is also included within the CEDS.

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;
- Looks beyond the immediate economic horizon, anticipates economic changes, and diversifies 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 among the business sector, relevant regional partners, and local, state, and federal governments¹

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 economic development assets to attract private-sector investments which, in turn, can help increase the local and regional tax bases.

The CEDS also identifies a number of industry clusters that have a strong presence within the Region, helping to steer economic development investments to these clusters to foster innovation and entrepreneurship. In addition efforts are made to emphasize long-term economic development planning by continuously working to identify and develop emerging clusters helping to diversify the local and regional economies.

¹ 13 CFR Chapter 3: Economic Development Administration, Department of Commerce § 301.8

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

2.1 Legal Structure

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

2.2 Participating Governments

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

2.3 Organization of G/FLRPC

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

Several committees currently serve G/FLRPC. They include: the Executive Committee, the Economic Development Advisory Committee (EDAC) and the Planning Coordination Committee (PCC).

G/FLRPC's members meet quarterly to discuss and review project and program progress and regional issues. G/FLRPC's members are listed in Table 1 on the following page.

2010-2011 Comprehensive Economic Development Strategy Update

Table 1 - Genesee/Finger Lakes Regional Planning Council				
Member	Affiliation	Status	Race	Gender
Mary Pat Hancock	Genesee County	Voting	White	Female
Robert Radley (A)	Genesee County	Voting	White	Male
Steve Hyde	Genesee County	Voting	White	Male
Esther Leadley	Genesee County	Voting	White	Female
<i>James Duval</i>	<i>Genesee County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
James Merrick	Livingston County	Voting	White	Male
Brenda Donohue (A)	Livingston County	Voting	White	Female
William Wadsworth	Livingston County	Voting	White	Male
Bonnie Taylor-Davis	Livingston County	Voting	Black	Female
<i>Angela Ellis</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Julie Marshall</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Patrick Rountree</i>	<i>Livingston County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Maggie Brooks	Monroe County	Voting	White	Female
Jeffrey Adair	Monroe County	Voting	White	Male
Robert Colby	Monroe County	Voting	White	Male
Linda Dobson	Monroe County	Voting	White	Female
Kal Wysokowski	Monroe County	Voting	White	Female
<i>Thomas Goodwin</i>	<i>Monroe County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Judy Seil</i>	<i>Monroe County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Thomas Richards	City of Rochester	Voting	White	Male
Marcia Barry (A)	City of Rochester	Voting	White	Female
Lovely Warren	City of Rochester	Voting	Black	Female
Andrea Guzzetta (A)	City of Rochester	Voting	White	Female
<i>Karen Altman</i>	<i>City of Rochester</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
Theodore Fafinski	Ontario County	Voting	White	Male
Robert LaRocca (A)	Ontario County	Voting	White	Male
Samuel Casella	Ontario County	Voting	White	Male
Dorothy Huber	Ontario County	Voting	White	Female
<i>Kristen Hughes</i>	<i>Ontario County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Michael Manikowski</i>	<i>Ontario County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
David Callard	Orleans County	Voting	White	Male
Wayne Hale (A)	Orleans County	Voting	White	Male
Kenneth Rush	Orleans County	Voting	White	Male
<i>James Whipple</i>	<i>Orleans County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Laverne Lafler	Seneca County	Voting	White	Male
William Bordeau (A)	Seneca County	Voting	White	Male
<i>Robert Aronson</i>	<i>Seneca County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Mitchell Rowe</i>	<i>Seneca County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
James Hoffman	Wayne County	Voting	White	Male
Robert Kelsch	Wayne County	Voting	White	Male
Ken Lauderdale	Wayne County	Voting	White	Male
<i>Margaret Churchill</i>	<i>Wayne County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Ora Rothfuss</i>	<i>Wayne County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Douglas Berwanger	Wyoming County	Voting	White	Male
Joe Gozelski (A)	Wyoming County	Voting	White	Male
Jerry Davis	Wyoming County	Voting	White	Male
<i>Michael Hefika</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
<i>Arthur Buckley</i>	<i>Wyoming County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
H. Taylor Finch	Yates County	Voting	White	Male
Robert Multer (A)	Yates County	Voting	White	Male
Donald House	Yates County	Voting	White	Male
<i>Shawna Bonshak</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Female</i>
<i>Steve Griffin</i>	<i>Yates County</i>	<i>Ex-Officio</i>	<i>White</i>	<i>Male</i>
Wilfred Brooks	At-Large	Voting	Black	Male
Clyde Forbes	At-Large	Voting	Black	Male
Nathan Rudgers	At-Large	Voting	White	Male
David Woods	At-Large	Voting	White	Male
<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 (CEDS) Committee

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

Each of the CEDS Strategy Committee members and other regional stakeholders from the public-sector, private-sector and community were invited to Stakeholder Input sessions held on June 28, 29 and 30, 2010. Invitations were e-mailed and/or mailed to their home and/or office, and a personal invitation was given to those in attendance at the June 2010 Regional Planning Council/CEDS Strategy Committee meeting. A copy of the invitation that was distributed to the CEDS Strategy Committee members can be found in Appendix 1. A list of CEDS Stakeholder Input sessions attendees, a copy of the presentation given at the three meetings, and notes from the meetings are available in Appendices 7, 8, and 9.

Individual meetings with each County Economic Development/Industrial Development Agency, the City of Rochester Economic Development Department and other regional stakeholders were conducted during July and August, 2010 allowing these groups the opportunity to provide further insight, recommendations and updates to the Comprehensive Economic Development Strategy. Follow up conversations were also held with these groups in April and May, 2011 to inform the 2010-2011 Comprehensive Economic Development Strategy Update.

The CEDS was also discussed at the August 13, 2010 Economic Development Advisory Committee (EDAC)/Regional Development Corporation (RDC) meeting and again at the June 23, 2011 EDAC/RDC meeting to allow EDAC and RDC members the opportunity to provide additional input and feedback into the goals and priorities outlined in the CEDS.

2.3.b Executive Committee

The Executive Committee is responsible for the day-to-day management and policy decisions of the organization. The Executive Committee typically meets four to eight times annually. The Executive Committee's members are listed in Table 2.

Table 2 - Executive Committee				
Member	Address	Affiliation	Race	Gender
Esther Leadley	11047 River Road Pavilion, NY 14525	Legislator, Genesee County Legislature	White	Female
Brenda Donohue	6 Court Street Geneseo, NY 14454	Supervisor, Town of Conesus, Livingston County Board of Supervisors	White	Female
Jeffrey Adair, Vice Chair	777 Quaker Road Scottsville, NY 14546	President, Monroe County Legislature	White	Male
Marcia Barry	City Hall, Room 010A 30 Church Street Rochester, NY 14614	City of Rochester Department of Community Development	White	Female
Dorothy Huber	PO Box 85 East Bloomfield, NY 14443	Supervisor, Town of East Bloomfield, Ontario County Board of Supervisors	White	Female
Wayne Hale	14016 Route 31 West Albion, NY 14411	Director, Orleans County Planning and Development	White	Male
James Hoffman	26 Church Street Lyons, NY 14489	Supervisor, Town of Williamson, Chairman, Wayne County Board of Supervisors	White	Male
Jerry Davis, Chair	7414 Court Road Pavilion, NY 14525	Supervisor, Town of Covington, Wyoming County Board of Supervisors	White	Male
Donald House	Yates County Legislature Penn Yan, NY 14527	Legislator, Yates County Legislature	White	Male
Wilfred Brooks	98 South Pearl Street Oakfield, NY 14125	At-Large	Black	Male
James Duval	3837 West Main Street Batavia, NY 14020	Chair, G/FLRPC Planning Coordination Committee	White	Male
Steve Griffin	1 Keuka Business Park Penn Yan, NY 14527	Chair, G/FLRPC Economic Development Advisory Committee	White	Male

2.3.c Economic Development Advisory Committee

The Economic Development Advisory Committee (EDAC) was specifically designed to assist with the District's economic development program. Its members include one professional developer from each county, the City of Rochester and the regional office of the Empire State Development Corporation. Each is jointly responsible for representing the interests of their respective jurisdictions, as well as the entire Region. The EDAC Chair is a member of the Executive Committee and the EDAC's members are ex-officio, non-voting members of the G/FLRPC. EDAC's members are listed in Table 3.

Table 3 - Economic Development Advisory Committee (EDAC)				
Member	Address	Affiliation	Race	Gender
Steve Hyde, CEO	99 Med Tech Drive Suite 106 Batavia, NY 14020	Genesee County Economic Development Center	White	Male
Patrick Rountree, Director	6 Court Street, Room 306 Geneseo, NY 14454	Livingston County Development Group	White	Male
Judy Seil, Director	50 West Main Street Suite 8100 Rochester, NY 14614	Monroe County Planning & Development	White	Female
Karen Altman, Manager of Business Development	City Hall, Room 005A 30 Church Street Rochester, NY 14614	City of Rochester Economic Development Department	White	Female
Michael Manikowski, Director	20 Ontario Street Suite 106B Canandaigua, NY 14424	Ontario County Office of Economic Development	White	Male
James Whipple CEO/CFO	121 North Main Street Albion, NY 14411	Orleans County Economic Development Agency	White	Male
Robert Aronson, Executive Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Industrial Development Agency	White	Male
Margaret Churchill, Executive Director	16 William Street Lyons, NY 14489	Wayne County Industrial Development Agency	White	Female
Michael Heftka, Executive Director	6470 Route 20A Suite 4 Perry, NY 14530	Wyoming County Industrial Development Agency	White	Male
Steve Griffin, Executive Director, Chair	1 Keuka Business Park Penn Yan, NY 14527	Yates County Industrial Development Agency	White	Male
Robert McNary Director, Finger Lakes Regional Office	400 Andrews Street, Suite 300 Rochester, NY 14604	Empire State Development Corporation	White	Male

2.3.d Rochester/Finger Lakes Regional Development Corporation

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

Table 4 – Rochester/Finger Lakes Regional Development Corporation (RDC)				
Member	Address	Affiliation	Race	Gender
Brian R. Anderson, Lead Economic Developer	300 Erie Boulevard West A-2 Syracuse, NY 13202	National Grid	White	Male
Richard Boerman, Loan Management	6712 Ann Lee Drive North Rose, NY 14516	Regional Development Corporation	White	Male
Dana Brunett, President	400 East Avenue Rochester, NY 14607	PathStone Enterprise Center	White	Male
Joe Rizzo, Director of Economic Development	89 East Avenue Rochester, NY 14649	Rochester Gas & Electric Corporation	White	Male
Suzanne Vary, Economic Development Specialist	20 Ontario Street Suite 106B Canandaigua, NY 14424	Ontario County Office of Economic Development	White	Female
Julie Marshall, Deputy Director	6 Court Street Room 306 Geneseo, NY 14454	Livingston County Development Group	White	Female
Joseph Hamm, Regional Administrator	276 Waring Rd Rochester, NY 14609	NYS Department of Labor	White	Male
Richard Perrin, Executive Director	50 W. Main Street., Suite 8112 Rochester, NY 14614	Genesee Transportation Council	White	Male
Matt Hurlbutt, Managing Director, Business Development	100 Chestnut Street - One HSBC Plaza Suite 1910 Rochester, NY 14604	Greater Rochester Enterprise	White	Male

2.3.e Planning Coordination Committee

The Planning Coordination Committee (PCC) serves as the general planning advisory committee to G/FLRPC. PCC's members meet bi-monthly. Its members include the Planning Directors from the nine counties and the City of Rochester, as well as the Director of the Metropolitan Planning Organization. The Chair of the PCC is a member of the Executive Committee. PCC's current members are listed in Table 5.

Table 5 - Planning Coordination Committee (PCC)				
Member	Address	Affiliation	Race	Gender
James Duval, Director	County Building II 3837 West Main Street Batavia, NY 14020	Genesee County Department of Planning	White	Male
Angela Ellis, Director	6 Court Street - Room 305 Geneseo, NY 14454	Livingston County Planning Department	White	Female
Thomas Goodwin, Planning Manager	50 West Main Street, Suite 8100 Rochester, NY 14614	Monroe County Planning & Development	White	Male
Marcia Barry, Director of Planning and Zoning	City Hall, Room 010A 30 Church Street Rochester, NY 14614	City of Rochester Department of Community Development	White	Female
Kris Hughes, Director	20 Ontario Street Canandaigua, NY 14424	Ontario County Division of Planning and Research	White	Male
Wayne Hale, Director	14016 Route 31 West Albion, NY 14411	County of Orleans Department of Planning and Development	White	Male
Mitchell Rowe, Director	1 DiPronio Drive Waterloo, NY 13165	Seneca County Department of Planning & Community Development	White	Male
Ora Rothfuss, Interim Director	9 Pearl Street Lyons, NY 14489	Wayne County Planning Department	White	Male
Arthur Buckley, County Planner	6470 State Route 20A, Suite 4 Perry, NY 14530	Wyoming County Department of Planning & Development	White	Male
Shawna Bonshak, Planner	417 Liberty Street Penn Yan, NY 14527	Yates County Department of Planning	White	Female
Richard Perrin, Executive Director	50 W. Main Street., Suite 8112 Rochester, NY 14614	Genesee Transportation Council	White	Male

2.3.f Staff

All of G/FLRPC's employees are involved in the District's economic development program since all programs directly or indirectly influence the economic standing of the Region. The Council staff provides professional assistance to its member governments in support of all District programs. Council staff is listed in Table 6.

Table 6 - District Staff			
Name	Title	Race	Gender
Greg Albert	Senior Planner – Economic Development	White	Male
Rudeen Armstrong	Business Manager	Black	Female
Jayne Breschard	Senior Planner	White	Female
Razy Kased	Planner	White	Male
Thomas Kicior	Planner	White	Male
Brian Slack	Senior Planner	White	Male
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 Regional, Local and Water Resources Planning

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

In an effort to support local government training and education, G/FLRPC, has presented the Regional Local Government Workshop series since 1996. The workshops attract municipal staffs, elected officials, and boards, along with other planning professionals.

2.3.g.ii.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 and updates 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.ii.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. The vitality of community centers is integrally related to land use, environmental resources, economic development, zoning, and design.

2.3.g.ii.c Municipal Planning

Municipal Planning services include local government services, comprehensive planning, land use regulation and control and a host of other planning initiatives including build-out and fiscal impact analyses and cultural resource surveys. G/FLRPC staff has knowledge and experience in a wide range of planning issues and assists and collaborates with municipal officials, staff, and citizens as needed.

2.3.g.ii.d Water Resources Planning

Water Resources Planning encompasses a variety of services, which advance the overall goal of protecting and improving water quality and quantity and the uses of our surface and groundwater. As a regional agency, G/FLRPC is able to examine and coordinate water resource issues at a watershed wide level. Services include water resources planning, watershed management planning, blueway trails, and assistance with the implementation of state and federal regulations. Current projects include general water resources planning, the Green Infrastructure and Low Impact Development Evaluation and Implementation Plan, and involvement with the development of watershed management plans. Recently completed projects include the *Genesee-Finger Lakes Regional Blueway Trails Analysis* and the *Genesee-Finger Lakes Regional Impervious Surface Scan: An Inventory of Impervious Surfaces in the Genesee-Finger Lakes Region*.

2.3.g.ii.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.

Recently completed projects include the *Genesee-Finger Lakes Regional Inventory of Culturally Significant Areas*, which is a cultural resource survey that identifies historic and cultural landscapes that are of regional significance in the G-FL Region. This survey will promote awareness about cultural landscapes and provide a comprehensive record of existing conditions for consideration in future development activities.

2.3.g.iii Data, Technology and Resource Center

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

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

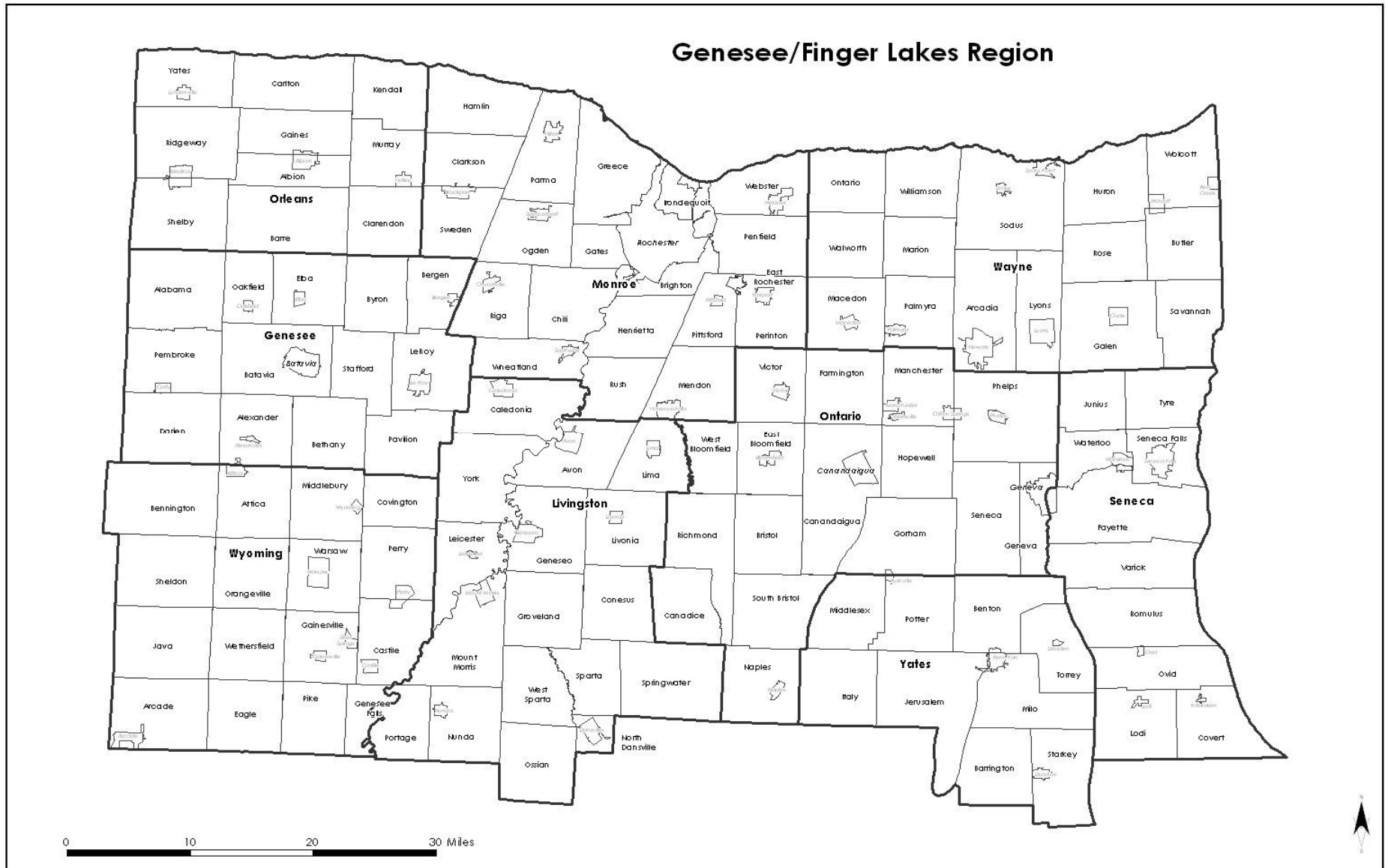
The district provides socio-economic and demographic data development, analysis and dissemination services which includes working through the New York State Data Center (NYSDC) Affiliate program. The NYSDC Affiliate program operates through a network of Affiliate Data Centers throughout the State. These 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. Current projects include the Gates-Chili School District Demographic Study. Recently completed projects include the Transportation Analysis Zone Analysis and Revisions, Local Update of Census Addresses Appeals process, and Census 2010 outreach activities.

Chapter 3 – Overview of the Genesee-Finger Lakes Region

Chapter 3 provides an overview of historic, demographic, socioeconomic, and economic conditions of the District using data from federal, state and regional sources. An overview of socio-demographic information for each county and the District is provided and comparisons are made, where possible, to New York State and the United States.

3.1 Geography

The Genesee/Finger Lakes (G-FL) 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 G-FL Region is approximately 4,700 square miles. The map on the following page shows the nine-county Region.



3.2 History of the Region

The G-FL 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 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 transportation advantage. Infrastructure, such as waterways and canals, railroads and a highway system were drivers of agricultural and manufacturing industries helping to increase overall growth within 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, such as the development of saw mills to process wood.

The construction of the Erie Canal has historically been one of the largest catalysts 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 geographic location. The Erie Canal 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. These linkages were later extended by railroads and highways fostering 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 entrepreneurial spirit 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 the Region's emphasis on technology and innovation still remains.

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. 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 below helps to illustrate the trends of the region and individual counties over time. Although each of the counties has their own unique demographic composition, there are many similarities that exist that lend themselves to using a regional perspective. The following section utilizes the most recently available socio-economic and demographic data to portray the current state of the District.

3.3.a Population Trends

Monroe County, anchored by the City of Rochester, has historically had the largest population of the counties in the Region. As shown by Table 7, *Population for the G-FL Region (1960-2010)*, the most populous counties, after Monroe, have been Ontario and Wayne.

Table 7 - Population for the G-FL Region (1960-2010)						
	1960	1970	1980	1990	2000	2010
Genesee	53,994	58,722	59,400	60,060	60,370	60,079
Livingston	44,053	55,041	57,006	62,372	64,328	65,393
Monroe	586,387	711,917	702,238	713,968	735,343	744,344
Ontario	68,070	78,849	88,909	95,101	100,224	107,931
Orleans	34,159	37,305	38,496	41,846	44,171	42,883
Seneca	31,984	35,083	33,733	33,683	33,342	35,251
Wayne	67,989	79,404	84,581	89,123	93,765	93,772
Wyoming	34,793	37,688	39,895	42,507	43,424	42,155
Yates	18,614	19,831	21,459	22,810	24,621	25,348
G-FL Region	940,043	1,113,840	1,125,717	1,161,470	1,199,588	1,217,156

Source: U.S. Census Bureau

Population growth within Ontario and Wayne 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 stable population over the last 50 years.

Monroe County experienced explosive population growth between 1960 and 1970, but there was a slight decline in population between 1970 and 1980. Increases have followed in each subsequent decade to its current population of 744,344. Ontario County has had steady increases in population from 1960 onward, growing from a population of 68,070 in 1960 to its current 2010 level of 107,931. From 1970 to 2010, all counties within the Region have experienced some growth in population, expanding the Regional population from 1,113,840 in 1970 to 1,217,156 in 2010.

3.3.b Population Growth (1980-2010)

In order to understand recent population shifts and dynamics, an analysis of population growth from 1980-2010 was compiled in Table 8, *Population Growth for the G-FL Region, New York State and the U.S. (1980-2010)*.

Table 8 - Population Growth for the G-FL Region, New York State, and the U.S. (1980-2010)

	1980	1990	2010	Change (1980-2010)	
				By People	By percentage
Genesee	59,400	60,060	60,079	679	1.1%
Livingston	57,006	62,372	65,393	8,387	14.7%
Monroe	702,238	713,968	744,344	42,106	6.0%
City of Rochester	241,741	231,636	210,565	-31,176	-12.9%
Ontario	88,909	95,101	107,931	19,022	21.4%
Orleans	38,496	41,846	42,883	4,387	11.4%
Seneca	33,733	33,683	35,251	1,518	4.5%
Wayne	84,581	89,123	93,772	9,191	10.9%
Wyoming	39,895	42,507	42,155	2,260	5.7%
Yates	21,459	22,810	25,348	3,889	18.1%
G-FL Region	1,125,717	1,161,470	1,217,156	91,439	8.1%
New York State	17,558,165	17,990,778	19,378,102	1,819,937	10.4%
United States	226,545,805	248,718,297	308,745,538	82,199,733	36.3%

Source: U.S. Census Bureau

During the thirty year time period, the United States experienced explosive population growth with a growth rate of 36.3%. The growth rate in New York State was moderate with an increase in population of 10.4%. The G-FL Region grew at a rate of 8.1% during the period of time between 1980 and 2010. This is slightly less than the growth rate for New York State, but far less than national growth.

Five counties in the G-FL Region had growth rates greater than the state: Livingston, Ontario, Orleans, Wayne, and Yates. The City of Rochester experienced a decline in population of 31,176 during this time period, which represented a loss of 12.9%.

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. Based upon U.S. Census, the percentage of people over the age of 65 in the Region is 14.3%, compared to 13.5% in the state and 13.0 in the nation, as illustrated by Table 9, *Age Distribution for the G-FL Region, New York State and the U.S. 2010*. Every county in the Region had a larger percentage of its population over the age of 65 than the national total of 13.0%.

The low percentage of people aged 25-44 is a cause for concern in the Region as this age cohort typically provides a significant economic impact to a region. The percentage of people between the ages of 25-44 in the G-FL Region for 2010 was 24.2%,

lower than New York State with 27.27% and the nation with 26.6% although Wyoming County does exceed the state and nation in percentage of persons in the 25-44 age cohort with 27.5% of its population between the ages of 25 and 44.

3.3.d Educational Attainment

An area where the G-FL Region has an advantage over other New York State and the U.S. is its educational attainment rates. U.S. Census American Community Survey three-year estimates (2007-2009) show that, in the G-FL Region, 88.0% of the population over the age of 25 had a high school diploma or higher. This is compared to 84.4% in New York State and 84.9% nationally, as illustrated by *Table 10, Educational Attainment Rates for the G-FL Region, New York State and the U.S. 2007-2009*.

Table 10 - Educational Attainment Rates for the G-FL Region, New York State and the U.S. 2007-2009 (ACS Estimate)

	Less than HS	HS Graduate	Some college	Associates Degree	Bachelors degree	Graduate degree or higher
Genesee	10.6%	38.5%	18.8%	13.1%	11.2%	7.8%
Livingston	12.5%	35.5%	18.0%	11.6%	12.4%	10.0%
Monroe	11.6%	26.0%	17.1%	10.5%	19.9%	14.8%
City of Rochester	21.6%	27.6%	17.6%	8.7%	14.5%	10.0%
Ontario	7.9%	29.0%	19.2%	14.3%	18.0%	11.7%
Orleans	16.1%	39.4%	20.8%	9.4%	9.1%	5.3%
Seneca	17.7%	35.8%	16.7%	11.7%	11.9%	6.1%
Wayne	13.4%	34.6%	19.0%	11.9%	12.5%	8.6%
Wyoming	15.6%	40.7%	17.7%	11.9%	9.1%	5.0%
Yates	16.9%	35.8%	15.7%	9.8%	12.5%	9.3%
G-FL Region	12.0%	29.6%	17.7%	11.2%	17.2%	12.4%
New York State	15.6%	28.1%	15.8%	8.2%	18.4%	13.8%
United States	15.1%	29.0%	20.7%	7.5%	17.6%	10.2%

Source: U.S. Census Bureau American Community Survey 2007-2009

Additionally, 29.6% of people in the G-FL Region have a Bachelor's degree or higher. This is higher than the national total of 27.8%, but lower than New York State with 33.2%.

Also important to a regional knowledge-based economy is the percentage of the population with an Associate's degree. The community colleges within the Region continue to train and prepare workers, positioning the G-FL Region well for the technology jobs of the future. For 2007-2009, 11.2% of those over the age of 25 in the G-FL Region had an Associates degree, which was greater than percentages with Associates degrees from New York State and the U.S.

3.3.e Per Capita Personal Income

Per capita income is the mean income computed for every man, woman and child in a particular group. It is derived by dividing the aggregate income of a particular group by the total population in that group.² The per capita income in the G-FL Region increased by \$3,093 in constant dollars, or 8.9%, between 1999 and 2009, as shown in Table 11, *Per Capita Personal Income for the G-FL Region, New York State and the U.S.*

Table 11 - Per Capita Personal Income (PCI) for the G-FL Region, New York State and the U.S.				
	PCI (\$)		Change (1999-2009)	
	1999*	2009	By Dollars	By Percent
Genesee	29,979	32,724	2,745	9.2%
Livingston	28,480	31,059	2,579	9.1%
Monroe	38,228	40,994	2,766	7.2%
Ontario	34,990	38,275	3,285	9.4%
Orleans	25,061	28,264	3,203	12.8%
Seneca	28,368	31,750	3,382	11.9%
Wayne	30,486	34,632	4,146	13.6%
Wyoming	24,095	28,472	4,377	18.2%
Yates	24,585	29,081	4,496	18.3%
G-FL Region	34,858	37,951	3,093	8.9%
New York State	42,012	46,516	4,504	10.7%
United States	36,485	39,635	3,150	8.6%
<i>Source: New York State Data Center</i>				
* 1999 dollars are adjusted for inflation and are expressed in 2009 dollars				

The per capita income in the G-FL Region is less than in both New York State and the United States. Per capita income has also increased at a lower percentage between 1999 and 2009 than the 10.7% growth in New York State, but has slightly outpaced the 8.6% growth of the U.S. per capita income during this time period.

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 that for the G-FL Region, between 1999 and 2009 the total population living in poverty increased 10.9% to 12.4% and the total population under the age of 18 living in poverty declined slightly 17.2% to 17.0%, as illustrated in Table 12, *Poverty Status for the G-FL Region, New York State and the U.S.* The percent of people living in poverty in the G-FL Region in 2009 is less than both New York State and the U.S. All counties within the Region, except for Monroe, experienced an increase in the percentage of people living in poverty between 1999 and 2009.

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

During the 1999 to 2009 time period, the percentage of the population under the age of 18 living in poverty decreased in the Region and New York State, but increased from 17.1% to 20.0% in the U.S. Within the Region Yates County had the highest percentage of the population living in poverty in 2009 with 13.8%.

3.3.g Housing

One of the positive attributes of the G-FL Region is that housing prices are moderate which is illustrated in both housing values and home ownership rates. According to the U.S. Census; 68.1% of homes in the G-FL Region were owner occupied. This is compared to 53.3% in New York State and 65.1% nationally. In addition, each county in the G-FL Region has a higher percentage of owner-occupied housing units than New York State and only Monroe County has a smaller percentage of owner-occupied housing than the U.S. as illustrated by Table 13, *Percentage Owner Occupied Housing Units 2010*.

Table 12 - Poverty Status for the G-FL Region, New York State and the U.S.

	Population living in poverty		Population under 18 living in poverty	
	1999	2009	1999	2009
Genesee	9.3%	10.5%	14.4%	14.0%
Livingston	10.2%	11.5%	14.4%	13.2%
Monroe	11.7%	13.4%	18.3%	18.5%
Ontario	7.9%	7.8%	13.6%	10.7%
Orleans	11.5%	12.8%	19.0%	19.1%
Seneca	11.2%	12.5%	18.3%	17.1%
Wayne	9.9%	11.0%	15.4%	14.9%
Wyoming	9.0%	11.3%	14.5%	14.8%
Yates	12.4%	13.8%	21.4%	23.1%
G-FL Region	10.9%	12.4%	17.2%	17.0%
New York	13.7%	14.2%	21.0%	20.2%
United States	11.9%	14.3%	17.1%	20.0%

Source: U.S. Census Bureau

Table 13 – Percentage Owner Occupied Housing Units 2010

	By Percent
Genesee	71.9%
Livingston	73.1%
Monroe	64.3%
Ontario	73.1%
Orleans	75.3%
Seneca	73.4%
Wayne	76.8%
Wyoming	75.9%
Yates	75.6%
G-FL Region	68.1%
New York State	53.3%
United States	65.1%

Source: U.S. Census Bureau

Table 14 - Median Home Values and Median Gross Rents 2007-2009 (ACS Estimate)

	Median Home Value	Median Gross Rent
Genesee	\$101,200	\$644
Livingston	\$114,800	\$661
Monroe	\$131,800	\$737
City of Rochester	\$74,200	\$692
Ontario	\$133,700	\$692
Orleans	\$87,200	\$610
Seneca	\$88,900	\$667
Wayne	\$108,700	\$662
Wyoming	\$94,600	\$604
Yates	\$117,100	\$585
New York State	\$310,100	\$958
United States	\$191,900	\$826

Source: U.S. Census Bureau

Furthermore, the American Community Survey three-year estimate median value home price for each county in the Region for 2007-2009 was substantially less than the state median home value of \$310,100 and the national

median home value of \$191,900, as illustrated by Table 14, *Median Home Values and Median Gross Rents 2007-2009*. In addition, each of the counties' median gross rent was less than both the state median gross rent of \$958 and the national median gross rent of \$826.

3.4 Economic, Workforce and Transportation Profile

The G-FL Region is transitioning from an industrial economy to a service-based economy. This is illustrated through the large number of firms and employment in the Retail Trade major sector and, to a certain extent, in the large number of employees in the Health Care and Social Assistance sector. Also notable is the increase in employment in the Educational Services sector, which has added over 7,000 jobs between 2000 and 2009. In addition, the decline of employment in the manufacturing sector has continued throughout the Region losing over 40,000 jobs between 2000 and 2009.

3.4.a Data Sources and Constraints

The following information for the Region will be presented below: employment by major sector, number of establishments, average annual wage, unemployment and agricultural economic statistics. The establishment, employment and wage data was collected from the New York State Department of Labor Quarterly Census of Employment and Wages for the years 2000 and 2009.

There are some constraints associated with Quarterly Census of Employment and Wages data. Data at the county level may be suppressed for confidentiality purposes so as not to reveal too much financial information about specific companies. The confidentiality screen is employed when there are less than three employers in an industry or one employer has 80% or more of the employment in an industry. This can cause an underestimation in the number of employees and firms in a region. At a large aggregate, such as major industry sector classification, the likelihood of this occurring is slim but should still be a consideration when viewing the data. A list of major sectors and the subsectors that are included in them can be found in Appendix 3.

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

The 2000-2009 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 consistent, making comparison of data prior to 2000 a challenge.

Although the 2000-2009 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 2008, the economy experienced a recession as a result of declining real estate prices and an increase in the price of oil. Large decreases in employment followed in the years after and only recently have we begun to see job growth nationally. This time period helps to 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 includes the number of farms, acres of farmland, and cash receipts for crops, livestock and all products in 2008. This data was gathered for the nine counties in the Region and New York State.

The final piece of data that was collected in this section was unemployment rates. The information was collected from the New York State Department of Labor using Local Area Unemployment Statistics data. It should be noted that there are some weaknesses in the data collection and that unemployment rates, especially during economic downturns, are often understated. This is due to two reasons. First, 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. Secondly, “discouraged” workers who wish to work but become so discouraged by the lack of opportunities that they stop looking for employment 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 2009 the top three sectors of employment were Government, Health Care and Social Assistance, and Manufacturing as illustrated in Table 15 - *Employment in the G-FL Region by Major Sector (2009)*.

Table 15 - Employment in the G-FL Region by Major Sector (2009)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	905	505	471	611	854
Mining	67	-	113	57	41
Construction	852	850	11,762	2,649	278
Manufacturing	2,783	1,872	46,751	5,948	2,018
Wholesale Trade	937	582	13,417	1,489	110
Retail Trade	2,870	2,481	38,471	8,223	1,184
Transportation and Warehousing	553	349	6,290	933	115
Information	172	229	8,213	872	91
Finance and Insurance	407	324	11,123	943	-
Real Estate and Rental and Leasing	171	169	5,829	305	47
Professional and Technical Services	490	320	19,102	1,452	411
Management of Companies and Enterprises	110	72	11,392	64	-
Administrative and Waste Services	450	260	20,708	1,360	142
Educational Services	160	49	23,058	841	-
Health Care and Social Assistance	2,538	1,935	58,972	6,544	1,447
Arts, Entertainment, and Recreation	921	133	5,044	1,259	96
Accommodation and Food Services	1,807	1,829	24,821	4,353	636
Other Services	979	593	13,334	1,504	276
Total, All Government	6,037	6,866	48,237	8,394	4,224
Unclassified	10	10	329	60	16
Total, All Private	17,279	12,880	320,235	39,663	8,710
Total, All Industries	23,316	19,746	368,472	48,057	12,934

Source: Quarterly Census of Employment and Wages

Table 15 - Employment in the G-FL Region by Major Sector(2009) (continued)					
	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	122	1,599	843	214	6,149
Mining	-	-	-	-	619
Construction	256	1,155	406	279	18,455
Manufacturing	1,755	5,807	1,874	952	69,774
Wholesale Trade	286	733	197	77	17,831
Retail Trade	2,054	3,332	1,591	676	60,867
Transportation and Warehousing	61	213	351	173	9,033
Information	26	209	82	49	9,949
Finance and Insurance	149	489	227	115	14,685
Real Estate and Rental and Leasing	147	177	44	111	6,982
Professional and Technical Services	171	582	208	119	22,843
Management of Companies and Enterprises	119	224	233	-	12,234
Administrative and Waste Services	217	765	1,050	54	24,987
Educational Services	-	78	-	637	25,058
Health Care and Social Assistance	1,181	2,848	720	1,116	77,318
Arts, Entertainment, and Recreation	67	269	185	46	8,024
Accommodation and Food Services	819	1,614	714	543	37,127
Other Services	257	585	446	299	18,232
Total, All Government	3,152	8,110	4,311	1,296	90,626
Unclassified	14	43	9	6	480
Total, All Private	7,944	21,267	9,208	5,539	442,597
Total, All Industries	11,096	29,377	13,519	6,835	533,223

Source: Quarterly Census of Employment and Wages

In 2009, there were 90,626 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 county in the Region where Government is not the largest sector of employment is Monroe County. A total of 17.0% of all employment in the Region can be attributed to public sector employment.

Healthcare and Social Assistance was the second largest employment sector in the Region with 77,318 employed in the sector. This can be attributed to the many healthcare facilities in the Region combined with an aging regional population.

Manufacturing was the third largest source of employment for the Region with 69,774 workers, accounting for 13.1% of regional employment and 15.8% of regional private employment.

Retail Trade had 60,867 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 2009 are shown in Table 16, *Change in Employment by Major Sector in the G-FL Region (2000-2009)*.

Table 16 -Change in Employment by Major Sector in the G-FL Region (2000-2009)

	2000	2009	Change	% Change
Agriculture, Forestry, Fishing & Hunting	5,504	6,149	645	11.7%
Mining	366	619	253	69.1%
Construction	19,990	18,455	-1,535	-7.7%
Manufacturing	110,177	69,774	-40,403	-36.7%
Wholesale Trade	19,124	17,831	-1,293	-6.8%
Retail Trade	65,575	60,867	-4,708	-7.2%
Transportation and Warehousing	9,333	9,033	-300	-3.2%
Information	12,938	9,949	-2,989	-23.1%
Finance and Insurance	15,191	14,685	-506	-3.3%
Real Estate and Rental and Leasing	7,523	6,982	-541	-7.2%
Professional and Technical Services	23,942	22,843	-1,099	-4.6%
Management of Companies and Enterprises	10,831	12,234	1,403	13.0%
Administrative and Waste Services	26,496	24,987	-1,509	-5.7%
Educational Services	17,087	25,058	7,971	46.6%
Health Care and Social Assistance	67,955	77,318	9,363	13.8%
Arts, Entertainment, and Recreation	7,146	8,024	878	12.3%
Accommodation and Food Services	37,141	37,127	-14	0.0%
Other Services	16,210	18,232	2,022	12.5%
Total, All Government	85,862	90,626	4,764	5.5%
Unclassified	293	480	187	63.8%
Total, All Private	476,063	442,597	-33,466	-7.0%
Total, All Industries	561,925	533,223	-28,702	-5.1%

Source: Quarterly Census of Employment and Wages

There was a loss of 40,403 manufacturing jobs in the nine year period from 2000 to 2009 for a decrease of 36.7%. This accounted for the overall loss in private sector employment. Public sector employment grew by 4,764 jobs but that could not offset the job loss in the private sector as there was a loss of 28,702 jobs in all industries.

The largest increase between 2000 and 2009 was in Health Care and Social Assistance with a gain of 9,363 jobs. In addition Educational Services gained 7,971 jobs during this period. Educational Services includes private primary and secondary schools, private colleges and universities, business schools, and technical and trade schools. Public K-12 schools, colleges and universities are included in Government employment. Other major sectors that experienced an increase in employment were Government; Other Services; Management of Companies and Enterprises; Arts, Entertainment and Recreation; Agriculture and Forestry, Fishing & Hunting; Mining; and Unclassified.

3.4.c Establishments

As the regional economy shifts from a largely industrial based economy it also shifts in the composition of establishment and establishment size. Table 17, *Number of Firms in the G-FL Region by Major Sector (2009)*, shows that there has been a shift from large establishments to smaller and medium sized ones as sources of employment, with the number of firms in the Region increasing accordingly.

Table 17 – Number of Firms in the G-FL Region by Major Sector (2009)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	55	51	46	54	52
Mining	8	-	8	8	4
Construction	149	148	1,594	307	87
Manufacturing	90	69	936	165	42
Wholesale Trade	91	59	1,055	165	20
Retail Trade	220	202	2,296	523	109
Transportation and Warehousing	32	23	334	48	25
Information	14	17	264	43	9
Finance and Insurance	55	53	1,000	117	-
Real Estate and Rental and Leasing	36	45	787	76	16
Professional and Technical Services	86	105	2,055	222	35
Management of Companies and Enterprises	9	4	156	7	-
Administrative and Waste Services	40	58	999	139	20
Educational Services	13	5	270	21	-
Health Care and Social Assistance	130	132	1,728	252	82
Arts, Entertainment, and Recreation	32	29	266	79	16
Accommodation and Food Services	124	129	1,401	270	54
Other Services	151	142	1,762	272	74
Total, All Government	81	99	324	120	66
Unclassified	13	17	350	53	15
Total, All Private	1,348	1,293	17,312	2,822	691
Total, All Industries	1,429	1,392	17,636	2,942	757

Source: Quarterly Census of Employment and Wages

Table 17 - Number of Firms in the G-FL Region by Major Sector (2009) (continued)					
	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	18	108	58	28	470
Mining	-	-	-	-	38
Construction	61	284	99	79	2,780
Manufacturing	48	139	50	42	1,574
Wholesale Trade	25	87	27	17	1,538
Retail Trade	174	270	139	91	4,006
Transportation and Warehousing	10	38	41	20	570
Information	9	30	8	7	402
Finance and Insurance	27	65	32	16	1,387
Real Estate and Rental and Leasing	18	54	16	18	1,061
Professional and Technical Services	43	112	47	28	2,715
Management of Companies and Enterprises	4	8	6	-	195
Administrative and Waste Services	28	115	33	19	1,438
Educational Services	-	12	-	6	332
Health Care and Social Assistance	65	149	62	61	2,655
Arts, Entertainment, and Recreation	9	37	25	10	502
Accommodation and Food Services	67	148	73	58	2,317
Other Services	58	182	87	60	2,776
Total, All Government	58	131	71	44	994
Unclassified	12	40	15	8	503
Total, All Private	681	1,883	821	569	27,281
Total, All Industries	739	2,014	892	613	28,275

Source: Quarterly Census of Employment and Wages

In 2009, there were 28,275 establishments in the G-FL Region and 27,281 were private sector firms. In the 2000 to 2009 time period, there was an increase in the number of establishments in the Region by 1,064, a 3.9% increase. The large majority of growth in establishments is derived from the private sector, which had an increase of 931 establishments.

The three major sectors with the largest number of establishments were Retail Trade, Construction, and Other Services, 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 2009 was \$40,843. This constitutes a decrease of \$44 from the 2000 average annual wage of \$40,887, when adjusted for inflation and expressed in 2009 dollars, as shown in Table 18, *Average Annual Wage for the G-FL Region (2009)*.

The reason for the small decrease not being worse can primarily be attributed to public sector employment as between 2000 and 2009 the average annual wage for private sector employment fell by \$847.

The three highest average annual wages by major sector in 2009 were: Management of Companies and Enterprises (\$79,799); Wholesale Trade (\$59,713); and Finance and Insurance (\$59,701).

Table 18 - Average Annual Wage for the G-FL Region (2009)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Agriculture, Forestry, Fishing & Hunting	\$34,227	\$29,814	\$20,828	\$27,376	\$24,232
Mining	\$38,446	-	\$41,190	\$39,783	\$43,941
Construction	\$39,657	\$44,222	\$50,280	\$51,435	\$40,107
Manufacturing	\$45,201	\$39,750	\$62,494	\$46,090	\$41,557
Wholesale Trade	\$45,109	\$50,342	\$62,264	\$62,434	\$47,165
Retail Trade	\$23,616	\$22,174	\$23,347	\$23,646	\$21,480
Transportation and Warehousing	\$36,151	\$36,412	\$32,288	\$38,774	\$32,174
Information	\$33,419	\$21,252	\$59,299	\$46,211	\$14,007
Finance and Insurance	\$49,258	\$32,391	\$65,983	\$44,824	-
Real Estate and Rental and Leasing	\$28,060	\$26,142	\$31,843	\$27,665	\$22,484
Professional and Technical Services	\$43,970	\$32,350	\$57,178	\$56,333	\$28,001
Management of Companies and Enterprises	\$55,071	\$37,207	\$82,084	\$41,032	-
Administrative and Waste Services	\$37,788	\$23,446	\$30,482	\$28,403	\$18,803
Educational Services	\$20,073	\$16,855	\$52,240	\$44,199	-
Health Care and Social Assistance	\$29,966	\$29,833	\$37,711	\$36,422	\$28,756
Arts, Entertainment, and Recreation	\$13,849	\$11,942	\$18,489	\$17,857	\$13,792
Accommodation and Food Services	\$13,042	\$12,042	\$14,640	\$14,737	\$10,259
Other Services	\$18,228	\$21,480	\$24,064	\$20,875	\$17,885
Total, All Government	\$37,782	\$39,037	\$46,674	\$41,732	\$43,017
Unclassified	\$19,305	\$24,055	\$26,756	\$15,643	\$20,634
Total, All Private	\$31,269	\$29,370	\$43,164	\$34,717	\$29,522
Total, All Industries	\$32,955	\$32,732	\$43,624	\$35,942	\$33,929

Source: Quarterly Census of Employment and Wages

Table 18 - Average Annual Wage for the G-FL Region (2009) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Agriculture, Forestry, Fishing & Hunting	\$20,965	\$26,845	\$28,840	\$18,588	\$27,191
Mining	-	-	-	-	\$50,985
Construction	\$45,550	\$38,651	\$36,105	\$28,403	\$48,191
Manufacturing	\$49,392	\$44,264	\$37,147	\$35,297	\$56,285
Wholesale Trade	\$35,987	\$50,876	\$46,578	\$37,442	\$59,713
Retail Trade	\$20,972	\$22,829	\$23,531	\$22,383	\$23,200
Transportation and Warehousing	\$23,740	\$35,589	\$25,067	\$38,559	\$33,180
Information	\$26,231	\$26,635	\$18,336	\$23,491	\$55,138
Finance and Insurance	\$35,149	\$39,611	\$43,160	\$34,288	\$59,701
Real Estate and Rental and Leasing	\$46,948	\$21,395	\$24,949	\$19,064	\$31,225
Professional and Technical Services	\$31,742	\$61,987	\$35,425	\$40,719	\$55,645
Management of Companies and Enterprises	\$84,121	\$44,790	\$37,684	-	\$79,799
Administrative and Waste Services	\$41,725	\$30,873	\$38,436	\$26,212	\$30,816
Educational Services	-	\$14,462	-	\$23,709	\$50,743
Health Care and Social Assistance	\$29,466	\$29,660	\$30,827	\$28,732	\$36,374
Arts, Entertainment, and Recreation	\$22,278	\$14,578	\$14,343	\$18,863	\$17,500
Accommodation and Food Services	\$13,217	\$11,391	\$11,396	\$13,234	\$14,118
Other Services	\$13,853	\$20,204	\$19,334	\$20,332	\$22,927
Total, All Government	\$42,540	\$40,130	\$44,190	\$35,569	\$43,871
Unclassified	\$16,262	\$18,397	\$16,132	\$27,878	\$23,917
Total, All Private	\$31,949	\$35,063	\$29,976	\$27,251	\$40,222
Total, All Industries	\$34,958	\$36,462	\$34,508	\$28,828	\$40,843

Source: Quarterly Census of Employment and Wages

The major sectors with the lowest average wages in 2009 were Accommodation and Food Services (\$14,118); Arts, Entertainment and Recreation (\$17,500); and Retail Trade (\$23,200). This may be partially attributed to the fact that these sectors are more likely to have part-time workers, thus making their wages lower since they are working fewer hours. Although the part-time status of many of these positions may factor into the lower wages, it should also be noted that the average annual wage for Arts, Entertainment and Recreation declined between 2000 and 2009, by \$1,812 in constant dollars.

3.4.e Unemployment

In 2010, the unemployment rate for the G-FL Region was 8.1% which constitutes an increase of 2.6% from 2008. This is illustrated in Table 19, *Unemployment Rate for the G-FL Region, New York State and the U.S. (2008-2010)*.

The Region's unemployment rate was lower than both the New York State and national unemployment rates 2010.

Between 2008 and 2010 New York State unemployment rose from 5.3% to 8.6%. During this period national unemployment increased from 5.8% to 9.6%.

Table 19 - Unemployment Rate for the G-FL Region, New York State and the U.S. (2008-2010)

	2008	2009	2010
Genesee	5.6%	7.8%	7.6%
Livingston	5.9%	8.6%	8.7%
Monroe	5.4%	8.0%	8.0%
City of Rochester	7.3%	10.4%	10.6%
Ontario	5.1%	7.4%	7.5%
Orleans	6.9%	9.5%	9.9%
Seneca	5.5%	7.8%	7.9%
Wayne	5.8%	8.5%	8.8%
Wyoming	6.2%	9.1%	9.2%
Yates	4.9%	6.9%	6.7%
G-FL Region	5.5%	8.1%	8.1%
New York State	5.3%	8.4%	8.6%
United States	5.8%	9.3%	9.6%

Source: U.S. Bureau of Labor Statistics

3.4.f Agricultural Economics

The agricultural sector is very important to the G-FL Region and its impact is shown in Table 20, *Agricultural Economic Statistics for the G-FL Region and New York State (2008)*.

There were 6,465 farms in the G-FL Region in 2008, constituting a total of 1,502,500 acres of farmland. In 2008, the agricultural industry in the G-FL Region yielded \$1,340,785,000 in cash receipts for all products. In total, 28.6% of the state's cash receipts from all agricultural products came from the G-FL Region. Specifically, 34.1% of the state's cash receipts in crops and 24.4% of cash receipts in livestock came from the G-FL Region.

There are some indicators that agriculture is being strengthened while others point to it being threatened. Between 2000 and 2008, there was a net gain of 13,300 acres of farmland in the Region and a net loss of 60 farms. Although there was a net loss of farms the cash receipts from farm marketings was not adversely affected. In 2000, the cash receipts from farm marketings in the G-FL Region totaled \$1,010,481,000 when adjusted to 2008 dollars. In the following seven year period, cash receipts increased by \$330,304,000 in constant dollars to \$1,340,785,000. Livestock cash receipts increased by 35.8% and crop cash receipts increased by 29.9% during this time period in constant 2008 dollars.

Table 20 - Agricultural Economic Statistics for the G-FL Region and New York State (2008)

	Number of Farms	Farmland (Acres)	Cash Receipts (in dollars)		
			Crops	Livestock	All Products
Genesee	555	181,600	\$81,040,000	\$107,894,000	\$188,934,000
Livingston	800	220,100	\$60,894,000	\$100,074,000	\$160,968,000
Monroe	585	131,700	\$79,177,000	\$10,084,000	\$89,261,000
Ontario	865	196,800	\$63,754,000	\$97,994,000	\$161,748,000
Orleans	560	138,300	\$114,577,00	\$11,334,000	\$125,911,000
Seneca	515	126,600	\$42,566,000	\$47,920,000	\$90,486,000
Wayne	945	166,800	\$165,409,000	\$38,072,000	\$203,481,000
Wyoming	770	215,800	\$36,800,000	\$189,107,000	\$225,907,000
Yates	870	124,800	\$40,974,000	\$53,115,000	\$94,089,000
G-FL Region	6,465	1,502,500	\$685,191,000	\$655,594,000	\$1,340,785,000
New York State	36,600	7,100,000	\$2,011,789,000	\$2,682,720,000	\$4,694,509,000
% New York State	17.7%	21.2%	34.1%	24.4%	28.6%

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

3.4.g Economic Analysis Tools

The following section utilizes two economic analysis tools to analyze the regional economy. The first tool is the Innovation Index, which helps measure a multitude of data that impacts innovation within a Region and allows for comparisons to be made against the State or National average. The second economic analysis tool utilized is the Industry Cluster Analysis, which displays the location quotient of 17 industry clusters for the Region. Each of the economic analysis indexes was developed by a partnership amongst the following; Purdue University, Indiana University, University of Missouri, Strategic Development Group, Inc., and Economic Modeling Specialist, Inc.

3.4.g.i Innovation Index

The Innovation Index helps to analyze the strength of innovation within a specified geography. The Index measures inputs to innovation and outputs to innovation through a variety of data subsets to form an innovation index number that can be compared to the United States average of 100. A number greater than 100 indicates above average innovation performance, while a number below 100 indicates below average innovation performance. The Innovation Index is made up of four smaller indexes; the smaller indexes and their weighted impact in the innovation index are as follows: Human Capital (30%), Economic Dynamics (30%), Productivity and Employment (30%) and Economic Well-Being (10%).

Table 21 – Innovation Index, G-FL Region, New York State and U.S. (2009)					
	Innovation Index	Human Capital³	Economic Dynamics⁴	Productivity and Employment⁵	Economic Well-Being⁶
Genesee	75.2	75.8	68	74.7	96.1
Livingston	78.1	76	68	84.1	96.7
Monroe	108	113.1	79.9	135.5	95
Ontario	88.8	99.3	81.6	81.7	99.9
Orleans	82.6	84.4	69.5	89.8	95.3
Seneca	76.7	80.5	72.3	72	93
Wayne	83.3	91.3	77.6	77	95.8
Wyoming	78.1	75.7	76.4	74.4	101.3
Yates	80.1	77.5	80.8	77.8	93.1
G-FL Region	104.4	103.7	78.7	133.7	95.6
New York State	102	100.5	86	120.8	98.5
United States	100	100	100	100	100

Source: Indiana Business Research Center

Table 21 *Innovation Index, G-FL Region, New York State, and U.S. (2009)* shows the Innovation Index for each county within the Region. The regional Innovation

Index for the G-FL Region in 2009 was 104.4, indicating that the Region is above-average in its preparation for the knowledge economy. The County with the highest Innovation Index in the Region in 2009 was Monroe County with an Index of 108. The county with the lowest Innovation Index for 2009 was Genesee County with an Index of 75.2.

³ Consists of educational attainment; population growth rates; high-tech employment share; and technology based employment occupations.

⁴ Consists of average venture capital; average private R&D; broadband density; establishment churn; and establishment sizes.

⁵ Consists of change in high tech employment; job growth; GDP per worker; and average patents per 1,000 workers.

⁶ Consists of average poverty rate; average unemployment rates; average net migration; average per-capita personal income, and compensation.

3.4.g.ii Industry Cluster Analysis

The Industry Cluster Analysis measures the regional location quotients amongst 17 industry clusters. 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 greater than 1.00 means that an area has a higher concentration in that particular industry than the national average. A location quotient less than 1.00 indicates that an area has a lower concentration of that particular industry than the national average. An Industry Cluster Analysis helps to illustrate the competitive strengths of a Region as well as potential weaknesses.

3.4.g.ii.a Industry Cluster Employment Analysis

The Industry Cluster Employment Analysis utilizes the employment location quotient to compare the employment amongst the 17 industry clusters within the region to the national average. Within the G-FL Region, there is a strong Machinery Manufacturing Industry Cluster with an employment location quotient of 3.12, as shown in Table 22- *G-FL Region Industry Cluster Analysis Employment (2009)*. Other industries which the Region has a high concentration of employment include Computer and Electronic Product Manufacturing (1.85), Chemicals & Chemical Based Products (1.77), and Fabricated Metal Product Manufacturing (1.46). Table 22 below displays the location quotients for the nine-counties and the Region. Location quotients greater than 1.2 are in bold to highlight the overall strength of that industry within the county or the Region.

Table 22 – G-FL Region Industry Cluster Analysis Employment (2009)					
	Genesee	Livingston	Monroe	Ontario	Orleans
Advanced Materials	0.13	0.07	0.89	0.66	0.26
Agribusiness, Food Processing & Technology	2.64	2.18	0.36	1.28	3.75
Apparel & Textiles	0	0	0.57	0.04	0
Arts, Entertainment, Recreation & Visitor Industries	1.2	0.27	0.64	0.97	0.19
Biomedical/Biotechnical (Life Sciences)	0.45	0.64	1.57	1.14	0.38
Business & Financial Services	0.31	0.21	0.83	0.32	0.25
Chemicals & Chemical Based Products	1.77	0.29	1.91	2.54	0.61
Defense & Security	0.18	1.09	0.46	0.2	0
Education & Knowledge Creation	0.07	1.1	0.68	1.12	1.51
Energy (Fossil & Renewable)	0.42	0.52	0.57	0.49	0.27
Forest & Wood Products	0.43	0.37	0.53	0.71	0.22
Glass & Ceramics	2.22	0	0.52	0.8	2.22
Information Technology & Telecommunications	0.11	0.03	1.09	0.94	0.04
Manufacturing Supercluster	1.02	0.88	1.57	1.12	0.72
Computer & Electronic Product Mfg	N/A	0.35	2.05	2.81	0
Electrical Equipment, Appliance & Component Mfg	N/A	0	0.74	0	N/A
Fabricated Metal Product Mfg	1.88	1.14	1.4	1.43	2.68
Machinery Mfg	3.16	1.23	3.54	1.16	0.53
Primary Metal Mfg	0	N/A	0.22	N/A	N/A
Transportation Equipment Mfg	0	1.26	0.48	0	0
Mining	0	0	0.33	0	2.23
Printing & Publishing	0.16	0.52	1.01	0.43	0.25
Transportation & Logistics	0.51	0.18	0.42	0.48	0.27
Total All Industries	1.00	1.00	1.00	1.00	1.00

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW) and Purdue Center for Regional Development

Table 22 – G-FL Region Industry Cluster Analysis Employment (2009) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Advanced Materials	0.02	0.56	0	0	0.72
Agribusiness, Food Processing & Technology	2.02	3.53	3.77	2.97	1.02
Apparel & Textiles	0	0	0	0	0.4
Arts, Entertainment, Recreation & Visitor Industries	0.04	0.34	0.12	0.15	0.62
Biomedical/Biotechnical (Life Sciences)	0.2	0.37	0.47	1.27	1.29
Business & Financial Services	0.15	0.2	0.12	0.29	0.65
Chemicals & Chemical Based Products	0	2.12	0	0	1.77
Defense & Security	2.03	0.24	0.01	0.09	0.44
Education & Knowledge Creation	0.91	1.38	0.01	0.89	0.76
Energy (Fossil & Renewable)	0.44	0.35	0.19	0.24	0.52
Forest & Wood Products	0.14	1.03	0.73	0.19	0.55
Glass & Ceramics	0	0.29	0	0	0.6
Information Technology & Telecommunications	0.06	0.03	0.01	0.14	0.85
Manufacturing Supercluster	1.87	1.76	0.4	0.02	1.43
Computer & Electronic Product Mfg	N/A	3.12	0	0	1.85
Electrical Equipment, Appliance & Component Mfg	N/A	0	0	N/A	0.51
Fabricated Metal Product Mfg	0	2.29	1.69	0.1	1.46
Machinery Mfg	10.24	2.92	0	0	3.12
Primary Metal Mfg	0	0	0	N/A	0.15
Transportation Equipment Mfg	N/A	0.23	0	0	0.39
Mining	N/A	0	0	N/A	0.28
Printing & Publishing	0	0	0	0	0.77
Transportation & Logistics	0.04	0.21	0.47	0.35	0.39
Total All Industries	1.00	1.00	1.00	1.00	1.00

Source: U.S. Bureau of Labor Statistics, *Quarterly Census of Employment & Wages (QCEW)* and Purdue Center for Regional Development

3.4.g.ii.b Industry Cluster Establishment Analysis

The Industry Cluster Establishment Analysis utilizes the establishment location quotient to compare the number of establishments amongst the 17 industry clusters within the region to the national average.

Within the G-FL Region, there is a strong Machinery Manufacturing Industry Cluster with an establishment location quotient of 2.90, as shown in Table 23- *G-FL Region Industry Cluster Analysis Establishments (2009)*. Other industries which the Region has a high concentration of establishments include Biomedical/Biotechnical (Life Sciences) (2.45), Computer and Electronic Product Manufacturing (1.97), and Manufacturing Supercluster (1.82). Table 23 below displays the location quotients for the nine-counties and the Region. Location quotients greater than 1.2 are in bold to highlight the overall strength of that industry within the county or the Region.

Table 23 – G-FL Region Industry Cluster Analysis Establishments (2009)

	Genesee	Livingston	Monroe	Ontario	Orleans
Advanced Materials	1.47	0.96	1.61	1.58	1.51
Agribusiness, Food Processing & Technology	3.29	3.01	0.42	1.85	4.96
Apparel & Textiles	0.39	0.40	0.88	0.49	0.44
Arts, Entertainment, Recreation & Visitor Industries	1.32	1.33	0.90	1.53	1.16
Biomedical/Biotechnical (Life Sciences)	1.07	1.48	3.16	1.86	0.87
Business & Financial Services	0.56	0.59	1.09	0.64	0.41
Chemicals & Chemical Based Products	1.91	1.02	0.87	1.41	1.37
Defense & Security	0.51	0.81	0.96	0.61	0.50
Education & Knowledge Creation	1.10	1.26	1.18	1.24	1.66
Energy (Fossil & Renewable)	0.98	1.04	0.85	0.88	0.97
Forest & Wood Products	1.59	1.53	0.97	1.17	1.08
Glass & Ceramics	2.97	0.61	1.13	2.16	3.35
Information Technology & Telecommunications	0.53	0.65	1.13	0.82	0.30
Manufacturing Supercluster	1.64	1.31	1.90	1.73	1.46
Computer & Electronic Product Mfg	N/A	1.36	2.23	3.07	1.25
Electrical Equipment, Appliance & Component Mfg	N/A	3.48	0.76	1.24	N/A
Fabricated Metal Product Mfg	1.98	0.96	1.69	1.62	2.16
Machinery Mfg	2.92	1.71	3.3	2.22	1.18
Primary Metal Mfg	2.12	N/A	0.77	N/A	N/A
Transportation Equipment Mfg	0.42	1.28	0.50	0.40	0.78
Mining	4.19	2.14	0.59	2.03	4.92
Printing & Publishing	0.42	0.66	1.28	0.72	0.66
Transportation & Logistics	0.97	0.70	0.77	0.64	1.47
Total All Industries	1.00	1.00	1.00	1.00	1.00

Table 23 – G-FL Region Industry Cluster Analysis Establishments (2009) (continued)

	Seneca	Wayne	Wyoming	Yates	G-FL Region
Advanced Materials	0.77	2.14	1.00	0.62	1.54
Agribusiness, Food Processing & Technology	3.68	3.98	5.07	5.05	1.54
Apparel & Textiles	0.91	0.33	0.63	0.18	0.72
Arts, Entertainment, Recreation & Visitor Industries	0.96	1.14	1.55	1.43	1.06
Biomedical/Biotechnical (Life Sciences)	0.85	0.83	0.92	1.79	2.45
Business & Financial Services	0.48	0.49	0.44	0.42	0.88
Chemicals & Chemical Based Products	0.18	1.48	0.73	1.48	1.03
Defense & Security	0.47	0.65	0.36	0.57	0.82
Education & Knowledge Creation	1.40	1.63	0.86	1.25	1.23
Energy (Fossil & Renewable)	1.04	1.04	0.83	0.94	0.89
Forest & Wood Products	1.11	1.80	1.74	1.26	1.14
Glass & Ceramics	0.57	1.68	0.95	1.39	1.39
Information Technology & Telecommunications	0.42	0.68	0.39	0.47	0.94
Manufacturing Supercluster	0.88	2.58	1.39	1.06	1.82
Computer & Electronic Product Mfg	N/A	1.88	0.53	0.78	1.97
Electrical Equipment, Appliance & Component Mfg	N/A	2.41	2.73	N/A	1.02
Fabricated Metal Product Mfg	0.60	2.95	1.67	0.97	1.72
Machinery Mfg	2.41	3.39	1.00	0.97	2.90
Primary Metal Mfg	2.04	0.75	3.39	N/A	0.80
Transportation Equipment Mfg	N/A	1.18	0.67	2.91	0.63
Mining	N/A	1.48	2.52	N/A	1.21
Printing & Publishing	0.74	0.36	0.57	0.30	1.01
Transportation & Logistics	0.48	0.80	1.70	1.09	0.81
Total All Industries	1.00	1.00	1.00	1.00	1.00

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW) and Purdue Center for Regional Development (cluster definitions)

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 G-FL Region. The transportation system in the Region contains the following modes: highway and bridge; public transportation; bicycle and pedestrian; goods movement; and interregional travel. These constitute a network of state and federal highways and local roads, walking and bicycle trails, commercial air service, and passenger rail service, and are available to the Region's residents, businesses, and industries. Additionally, manufacturers and suppliers have access to rail and air freight services. These transportation options facilitate efficient and effective travel within the Region and to destinations in other parts of the state, the nation, and the world.

The economic growth and vitality of the Region is dependent on the efficient movement of goods into, out of, within, and through the Region. The relative ease of getting products to market and receiving necessary inputs is a key consideration of goods-producing businesses when looking to continue, expand, or relocate operations. To ensure the economic success of the Region, the goods movement network needs to be a distinguishing competitive feature of the transportation system relative to other metropolitan areas within New York State, the nation and the world. To this end a Regional Goods Movement study is underway to develop strategies for freight and goods movement within the Region. The study will produce a regional freight and economic profile of the Region and analyze the transportation needs of businesses within the Region. Additional information about the goods movement study is available in section 4.6.a.ii.

3.4.h.i Truck Service

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

According to freight movement data from the 2007 Economic Census⁷, trucks handled 89.7% of the total inbound tonnage to the Region and 94.4% of the total outbound tonnage from the Region. The total tonnage transported to and from the Region by truck was over 66 million during this time period. The distinct competitive advantage that trucks offer in terms of flexibility for short hauls indicates that these trends will continue in the long-term.

3.4.h.ii Rail Service

The transport of freight in the Region via railroads continues to decline. Two Class 1 (annual revenues in excess of \$250 million) railroads, CSX and Norfolk Southern, and ten Class 3 (annual revenues less than \$20 million) railroads, operate in the Region. A total of \$908 million worth of goods were transported to the Region via rail in the year 2007, representing approximately 2.3% of the total value of goods received by the Region. This represented an

⁷ 2007 US Economic Census Commodity Flow Survey Metropolitan Areas: Rochester-Batavia-Seneca Falls, NY.

increase from the 1.5% of the total value of goods received by the Region and \$396 million⁸ transported to the Region via rail in the year 2002.

3.4.h.iii Air Cargo

According to the Federal Aviation Administration, 284,465,124 pounds of freight was shipped through facilities at the Greater Rochester International Airport (GRIA) in 2009. While this is a significant amount of air cargo, it represents a decline of 5.67% from the 301,560,202 pounds of freight handled in calendar year 2008. Despite this decline GRIA was still the second largest air cargo airport in upstate New York behind only Syracuse Hancock International Airport in Syracuse, NY. As the regional economy continues to transition to higher value added production industries, the requirements placed on GRIA's air cargo capabilities will increase, as will the ability of trucks and other vehicles to access freight facilities at the airport.

3.4.h.iv Water Transport

The Port of Rochester at the mouth of the Genesee River handles the only significant waterborne freight movement in the Region. Inbound shipments of cement to be distributed through the state are regularly received here, but limited access to major highways has limited its potential for increased freight movement. Increasing the amount of goods transported along the Erie Canal has been raised by members of the community. Commercial activity along the Erie Canal is limited by varying controlling depths along the 524-mile long waterway. The New York State Canal Corporation, a subsidiary of the New York State Thruway Authority, is responsible for the maintenance and operation of the Erie Canal as well as entitling the transport of goods along it.⁹

⁸ Adjusted for inflation and shown in 2007 dollars

⁹ GTC *Long Range Transportation Plan for the Genesee-Finger Lakes Region: 2005-2025*

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

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

4.1 Regional Revolving Loan Fund

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

4.2 New York State Economic Development Activities

New York State's economic development activities and programs are largely led and coordinated by Empire State Development (ESD). ESD provides programs and services aimed at assisting businesses in establishing a company in the state, relocating to or expanding existing operations in the state, growing their workforce in the state, and in competing more effectively and profitably in domestic and international markets. As the designated representative of the Economic Development District, G/FLRPC continues to work closely with ESD, and New York State on the development and implementation of economic development priorities. G/FLRPC helps to coordinate input and comments from its nine-member counties regarding state economic development policies and programs. Additionally, G/FLRPC organizes forums and discussions amongst ESD and regional economic development stakeholders through regional roundtables and EDAC/RDC meetings.

ESD, and New York State, offer a range of programs and services to help attract businesses and spur investment within the State; several of which are outlined below.

4.2.a Excelsior Jobs Program

The Excelsior Jobs Program provides job creation and investment incentives to targeted industries. These targeted industries include biotechnology, pharmaceutical, high-tech, clean-technology, green technology, financial services, agriculture, and manufacturing. Firms participating in the program are eligible to receive up to four tax credits, depending on the level of investment and the number of jobs created or retained. The following credits can be earned through the Excelsior Jobs Program: Excelsior Jobs Tax Credit, Excelsior Investment Tax Credit, Excelsior Research and Development Tax Credit, and the Excelsior Real Property Tax Credit. Additional information regarding program eligibility and application requirements is available online at <http://www.esd.ny.gov/BusinessPrograms/Excelsior.html>.

4.2.b Small Business Revolving Loan Fund

The Small Business Revolving Loan Fund is designed to promote greater access to capital for small businesses to help advance economic activity. The program provides low interest loans to community development financial institutions and other local community based lending organizations to provide loans to small businesses throughout New York State. Small businesses, including retail, service and manufacturing are eligible to apply for these funds to help create and retain jobs. Funds may be utilized for working capital, real property improvement or acquisition, purchasing machinery or equipment, improvement of property, or refinancing of debt obligations. Additional information regarding the program is available online at <http://www.esd.ny.gov/BusinessPrograms/SBRLF.html>.

4.2.c Upstate Regional Blueprint Fund

Empire State Development made available \$120 million for the Upstate Regional Blueprint Fund for fiscal years 2009 and 2010. The program provided grants, subsidized loans, or convertible loans for a range of entities including but not limited to: for-profit businesses, not-for profit corporations, economic development organizations, and municipalities. Funds were utilized for business investment, infrastructure investment, or downtown redevelopment. Within the G-FL Region, over \$4.9 million in funding was received during the first and second rounds of funding. This funding helped to create or retain over 330 jobs in the Region.

4.2.d Centers of Excellence

New York State's Centers of Excellence program is designed to create partnerships between universities, the private sector and the public sector to support the development of promising technologies with commercial applications. Centers of Excellence, along with programs aimed at technology incubation and supporting high-technology and bio-technology, demonstrate the state's recognition of the importance of nurturing an innovation economy in New York State. The Centers of Excellence in New York State and their specializations are as follows: Bioinformatics and Life Sciences in Buffalo; Smart System Technology and Commercialization in Canandaigua; Nanoelectronics in Albany; Information Technology on Long Island; Environmental Systems in Syracuse; and Small Scale Systems Integration and Packaging in Binghamton. The Smart System Technology and Commercialization Center is located within the G-FL Region and is detailed in section 4.5.c. and section 5.6.

4.2.e 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. The program offered four rounds of funding between 1999 and 2008, helping to establish a total of 96 "Build Now-NY" sites throughout the State with an additional 14 that are shovel ready certified only. There are 14 Certified Build Now-NY sites within the Region and one (1) shovel ready certified only site, which are listed in Table 24. The Crossroads Commerce Park and The Valley at Geneseo have also achieved certified Shovel Ready status in addition to being part of the "Build Now-NY" initiative.

Table 24– 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 (Build Now/Shovel Ready)
Apple Tree Acres Corporate Park	Town of Bergen, Genesee County	Multi-Tenant Business, Distribution & Light Manufacturing Park
Perry Commerce Center	Town of Perry, Wyoming County	Multi-Tenant Business & Technology Park
Rochester Technology Park	Town of Gates, Monroe County	Multi-Tenant Business & Technology Park
Valley at Geneseo	Town of Geneseo, Livingston County	Multi-Tenant Business & Technology Park (Build Now/Shovel Ready)
Livingston Industrial Complex	Village of Avon, Livingston County	Multi-Tenant Business & Technology Park
Gateway II Business Park	Town of Batavia, Genesee County	Multi-Tenant Business, Distribution & Light Manufacturing Park
Upstate NY Med & Tech Park	Town of Batavia, Genesee County	Medical Manufacturing / High Tech Manufacturing
Buffalo East Technology Park	Town of Pembroke, Genesee County	High Tech / Clean Tech Manufacturing / R&D
Genesee Valley Agri-Business Park	Town of Batavia, Genesee County	Food Processing, Agri-Business Manufacturing
PEZ Lake Development Facility	Town of Romulus, Seneca County	Multi-Tenant Business & Technology Park
Village Square	Honeoye Falls, Monroe County	Commercial/Industrial (Shovel Ready)
<i>Source: Empire State Development, 2011</i>		

4.2.f New York State Energy \$mart Program

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

programs. These programs are funded by the System Benefits Charge, a fee to users instituted by the New York State Public Service Commission to fund public policy initiatives in order to equalize the effects of electric utility deregulation.

The New York State Energy \$mart Program in the G-FL Region is administered by the Center for Environmental Information, Inc (CEI). CEI is charged with partnership development, program recruitment, project management, marketing, education, training, and development in an effort to reduce consumption and promote sustainability within the Region.

4.2.g New York State Historic Preservation

New York State's Historic Preservation Office (SHPO) assists communities in the evaluation and preservation of their historic and cultural resources. To this end the SHPO works with other organizations and partners offering several programs including Statewide Historic Resources Survey, New York State and National Registers of Historic Places, federal historic rehabilitation tax credit, state historic preservation grants program, state and federal environmental review, and technical assistance for communities. Additionally, owners of both historic income-producing and owner-occupied residential properties may qualify for rehabilitation tax credits through a newly expanded New York State rehabilitation tax credit program. The rehabilitation tax credit program is limited to distressed census tracts.

New York State has also recently passed the Smart Growth Infrastructure Act directing State agencies to make funding decisions for infrastructure based on smart growth principles.

SHPO has placed an emphasis on utilizing the above programs to encourage heritage tourism and community revitalization. More information regarding available historic preservation programs and program eligibility is available online at <http://nysparks.state.ny.us/shpo/>.

4.2.h New York State Division of Housing and Community Renewal

The mission of the Division of Housing and Community Renewal (DHCR) is to support community efforts to preserve and expand affordable housing, home ownership and economic opportunities, and by providing equal access to safe, decent and affordable housing. DHCR is one of several agencies that operate under the New York States Homes and Community Renewal Agency.

To help fulfill their mission DHCR oversees several programs including the New York State Community Development Block Grants Program, New York Main Street Program, Neighborhood Stabilization Program, and the Neighborhood and Rural Preservation Program.

These programs can help provide eligible communities with assistance for economic development projects including job training and entrepreneurial assistance, construction or building improvements, and acquisition of real estate. Assistance is also available to eligible communities for business expansion, attraction, or retention projects. Additional information regarding these programs, deadlines and eligibility requirements is available online at <http://www.dhcr.state.ny.us/Programs/NYS-CDBG/EconomicDevelopment.htm>.

4.2.i New York State Regional Economic Development Councils

In July 2011 New York State formed ten Regional Economic Development Councils, composed of local stakeholders from business; academia; local government; and non-governmental organizations, to help drive regional and local development efforts. Each of the ten councils will develop an initial five-year Strategic Plan that will include a vision statement; regional strategies to help achieve the vision; specific priority projects that can stimulate economic investment and job creation; and an outline for implementation of these strategies and performance measures. The Finger Lakes Regional Economic Development Council began meeting in August 2011 and is scheduled to complete the initial five-year Strategic Plan in November 2011.

4.3 Industry Clusters and Competencies

Targeted industry clusters and competencies within the Region have been identified through research performed by the Center for Government Research and through conversations with regional economic development stakeholders. These industry clusters have a strong economic presence within the Region, which can be expanded through focused collaboration and support of development and marketing efforts within the regional clusters.

The targeted cluster and competency industries for the G-FL Region are: Information and Communication Technology; Optics and Imaging; Biotech and Life Sciences; Agribusiness and Food Processing; Advanced Manufacturing; Alternative Energy; and Printing and Publishing.

4.4 Regional Workforce Development

Regional workforce development systems and activities in the Finger Lakes Region are performed by the three local Workforce Investment Boards and partnerships of private and public organizations and training providers to deliver services under the Workforce Investment Act (WIA) enacted in 1998 and effective in 2000.

4.4.a Workforce Investment Boards

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

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

The Genesee/Livingston/Orleans/Wyoming Workforce Investment Board (GLOW WIB) provides workforce development services to residents of Genesee, Livingston, Orleans and Wyoming Counties. The GLOW WIB aims to connect job seekers with emerging industries, regional economic development activities, and existing local businesses. To this end, the GLOW WIB has focused on transferable skills training that can transfer easily from industry to industry. Additionally, the GLOW WIB has identified emerging industries within the Region to help adapt the regional workforce to the jobs of tomorrow. These emerging issues are: alternative energy,

biotech and life science, technology, healthcare, agriculture, and advanced manufacturing. Between July 1st 2009 and June 30th 2010 the GLOW WIB administered over \$935,000 in individual training accounts, on the job and customized training for 480 individuals, provided business services to employers, and helped link over 2,700 individuals with jobs. Additional emphasis has also been placed on linking the economic development community with employers to identify workforce needs.

4.4.a.ii Finger Lakes Workforce Investment Board

The Finger Lakes Workforce Investment Board (Finger Lakes Works) provides workforce development services to residents of Ontario, Wayne, Yates and Seneca Counties. Finger Lakes Works coordinates with local businesses to develop needed trainings to close skill-gaps and prepare local workers for available and growing jobs.

Various workshops, trainings and an annual job fair are all conducted with this goal in mind. Between July 1, 2009 and June 30, 2010 over \$428,000 was administered in individual training accounts and over 10,800 individuals were assisted with services through the One Stop centers. Finger Lakes Works also operates the Finger Lakes Advanced Manufacturers Enterprise (FAME). FAME is a partnership amongst manufactures to increase development and prosperity in the Region through manufacturing networking and preparing youth for careers in manufacturing. FAME provides a forum for local manufacturers to discuss common issues and the outlet through Finger Lakes Works allows businesses to work together to address these issues. In the past year FAME has received funding from several regional industrial development agencies that has allowed FAME to expand its efforts into all nine Finger Lakes counties. Finger Lakes Works also continues its efforts to target key regional industries including: Advanced Manufacturing, Healthcare, Travel/Tourism, Agriculture, Information Technology, and Skilled Trades.

4.4.a.iii Rochester/Monroe County Workforce Investment Board

The Rochester/Monroe County Workforce Investment Board (Rochester Works) provides workforce development services to residents of Monroe County. Rochester Works looks to partner with existing organizations to integrate its services to support job seekers and businesses alike in growing sectors such as Advanced Manufacturing, Optics/Imaging, Information Technology, Health Care/Human Services, and Business Services. Training and support to job seekers are provided through workshops, networking opportunities and youth training and are delivered through the one-stop career centers. In 2010 Rochester Works also held the first annual Career Conference and participated in the first annual Greater Rochester Regional Career Conference, which was held simultaneously at Genesee, Finger Lakes, and Monroe Community Colleges.

Employees of existing businesses are also able to take advantage of training offerings to upgrade skills. Rochester Works also works closely with companies in the Region to help fill available job openings. In the 2009-2010 fiscal year Rochester Works helped fund over 120 businesses with over \$1.4 million in training grants, provided skills training to over 1,600 individuals and assisted over 1,500 youth with work readiness programs, job search assistance, and paid employment.

4.5 Regional Marketing, Research and Entrepreneur Activities

4.5.a Greater Rochester Enterprise

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

GRE is supported by a team of private and public sector leaders, who are dedicated to improving economic performance across the nine-county G-FL Region.

GRE's client-driven project management services include:

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

GRE works in a collaborative manner with economic development partners in Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates counties and the City of Rochester to support business attraction and expansion efforts throughout the nine-county region. The partners have retained administrative and approval functions for economic incentives and programs, but work in conjunction with GRE in offering incentives and programs in a coordinated team approach.

4.5.b Center for Integrated Manufacturing Studies

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

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

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

A final *Roadmap* report was produced in 2006 detailing the major findings, recommendations and strategies for moving forward. The following 10 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

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

4.5.b.ii Roadmap Implementation Activities

In addition to offering the recommendations mentioned above, CIMS is pursuing several implementation pilot projects designed to address the competitive challenges identified in the *Roadmap*.

4.5.b.ii.a The Knowledge Clearinghouse

Smaller companies that dominate the regional manufacturing economy often lack sufficient resources to acquire and apply all the knowledge necessary for them to compete effectively over time. The Knowledge Clearinghouse effort at CIMS works to improve the competitiveness of regional manufacturers and their clusters through activities such as:

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

4.5.b.ii.b The Innovation Test Bed

The Innovation Test Bed is an important resource to identify and facilitate development of needed manufacturing-related innovations and to help companies implement them. The Test Bed

helps improve the manufacturing-related innovation activities of these vital smaller manufacturers through activities such as:

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

4.5.b.ii.c Center for Sustainable Production

The Center for Sustainable Production (CSP) is dedicated to enhancing the environmental and economic performance of products and processes. This CIMS Center develops and applies tools for environmentally sustainable design, a holistic approach to creating high quality products with minimal ecological impact. There is a growing awareness that environmental problems are best addressed at the point of product and process development rather than attempting to control them end-of-pipe. CSP is developing tools and methods to help companies create closed-loop, economically sustainable product systems that maximize product reuse and remanufacturing.

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

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

4.5.b.ii.e National Center for Remanufacturing and Resource Recovery

The National Center for Remanufacturing and Resource Recovery (NC3R) is internationally recognized as a leading center for research in remanufacturing. Since 1990, NC3R has partnered with industry to develop, test and implement efficient and cost-effective remanufacturing processes while also promoting the design of products that have minimal negative environmental impacts. NC3R conducts research in Structural and Materials Analysis, Environmentally Responsible Cleaning Technologies, Intelligent Testing and Diagnosis, and Design for Remanufacturing.

A current NC3R initiative with long-term implications for the U.S. remanufacturing sector involves work with the World Trade Organization, the Organization for Economic Co-operation and Development (OECD) and other multinational groups to establish global policies concerning sustainable production practices, including remanufacturing.

4.5.b.ii.f Center for Sustainable Mobility

Center for Sustainable Mobility (CSM) is a CIMS initiative created to help shape the future of energy technologies applied to transportation. The U.S. Department of Transportation (DOT) provided initial funding for an alternative fuels and life-cycle engineering program. This DOT program will evaluate the environmental and economic impact of different alternative fuel and propulsion technologies on the entire U.S. public transportation system.

4.5.b.iii 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.

4.5.b.iv RIT Clean Energy Incubator

The RIT Clean Energy Incubator (CEI) is a joint effort by CIMS and RIT's Venture Creations business incubator that assists early-stage clean-energy companies in product development, business and marketing planning, and technology commercialization. The incubator enhances continued economic development in a host of energy-innovation areas, including Wind Energy, Solar Power, and Fuel Cell Development.

4.5.b.v New York State Pollution Prevention Institute

The NYS Pollution Prevention Institute aims to prevent pollution through resource efficiency achieved through sustainable technologies, improving the environmental quality of products, reducing waste, reducing the use of toxins, and reducing the life-cycle impact of process and products. The institute partners with RIT, the University at Buffalo, Clarkson University, Rensselaer Polytechnic University and the 10 regional technology development centers across New York State. The mission is to utilize these partnerships to research and develop best practices; disseminate information; and develop workshops, training and curriculum to bring the findings to local businesses.

4.5.b.vi Golisano Institute for Sustainability

The Golisano Institute for Sustainability (GIS) was established to undertake comprehensive interdisciplinary initiatives related to the subject of sustainability in education, research, and technology transfer that build upon a set of RIT's strongest academic programs and the internationally respected successes of CIMS. GIS applies a systems approach to industrial optimization while simultaneously addressing: Material Flow; Energy Utilization; Societal Needs; Ecological Impacts; Technology and Policy; and the Economies of Sustainable Business Practices. Graduates of GIS will be prepared to effect meaningful change on a global scale.

4.5.c College of Nanoscale Science and Engineering's Smart System Technology & Commercialization Center of Excellence (STC)

The Smart System Technology & Commercialization Center of Excellence (STC) is managed and supported by the College of Nanoscale Science and Engineering (CNSE) of the University at Albany - State University of New York (SUNY). The purpose of the center is to attract, retain and develop talent; promote regional collaboration between industries, universities and

government; boost the regional economy; and create a world-class photonics and micro electromechanical systems (MEMS) prototype, pilot and low-volume MEMS manufacturing facility. For more information on STC see section 5.6.

4.5.d Cornell Agriculture and Food Technology Park

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

The Cornell Agriculture and Food Technology Park campus features, a 20,000-square foot, multi-tenant flex technology incubator termed the Tech Farm. In 2006 the Park developed three pilot production plant areas, including a new Food and Beverage Innovation Center. These pilot production areas enable Park tenants to take newly developed products from the laboratory into a commercial production environment. In 2007, the Tech Farm was named Intelligent Facility of the Year by the Intelligent Community Forum in a highly competitive, international awards process. Currently, there are eight businesses calling the Technology Farm their home and the facility is at 80% occupancy. Additional information about the Cornell Agriculture and Food Technology Park is available in section 5.6.

4.5.e The Entrepreneurs Network

The Entrepreneurs Network (TEN), now in its fifth year of operation, continues to work with executives from new venture companies in Upstate New York to provide them with the needed business expertise to succeed and grow their businesses. Classes, consisting of 15-20 students, run for a course of 4 months providing training in developing a business plan, giving presentations to potential investors, and strategies on how to successfully enter the market to maximize revenue. A total of 185 individuals have been assisted from 170 different companies through the TEN program since it was established in 2006.

4.5.f Rochester Procurement Technical Assistance Center

PTAC was established by the United States Department of Defense to bring additional vendors into the government system to help increase competition in procurement and therefore increase the quality of services received, while at the same time lowering costs. Rochester PTAC works with local companies to help them tap into the government market. Workshops are provided outlining tips for submitting bids and securing contracts. Individual counseling sessions are also available for companies looking for assistance with the rules, regulations and requirements of submitting a bid and becoming a government vendor at the local, state or federal level. A total of 692 companies are currently members of PTAC and have received \$33.5 million in government contracts helping to create or retain 671 jobs within the Region.

4.5.g High Tech Rochester

High Tech Rochester (HTR) is a not-for-profit organization funded through the New York State Office of Science, Technology and Innovation (NYSTAR) and the National Institute of Standards and Technology (NIST) Manufacturing Extension Partnership (MEP). HTR is focused on economic development efforts in the G-FL Region surrounding technology commercialization, the high growth business sector, and new venture development. HTR works closely to assist new venture and established technology companies in the creation or expansion of their business through a variety of services, including assistance with developing a business plan, support with securing investors, and incubation services. Assistance to established manufacturing companies is provided through the Manufacturing Extension Partnership, which helps companies become more efficient and therefore more competitive in the global market. HTR has two incubator buildings, the Lennox Tech Enterprise Center and the Rochester BioVenture Center, which is the first technology incubator with a wet lab in the Region. HTR is also looking to construct a new incubator facility, due to increased demand, that will serve as an “innovation center” for the Region.

4.5.h Excell Partners, Inc.

Excell Partners, Inc. is an economic development partnership, formed in collaboration with the University of Rochester and the State of New York to support regional economic development by providing pre-seed and seed financing to high technology start up companies. Excell Partners, Inc. continues to maintain a portfolio of 18 companies within Upstate New York, with the long-term goal of developing the fund to be self-sustaining through profits. Investment decisions are based upon the following criteria: that the proposed technology/product will address a significant market need; be able to generate significant revenues and returns; is ready or nearly ready for market; that leadership is in place to move the technology/product forward; and that follow on-investors are likely.

4.6 Infrastructure

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

4.6.a Transportation Activities

The transportation network in the Region supports the movement of goods and people and, ultimately, influences the condition of the regional economy. The physical infrastructure consists of approximately 27,000 lane 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 eight of the nine counties in the Region. The exception is Yates County; where a study to assess the viability of public transportation was completed in 2007.

The regional organization with the responsibility for federally-funded transportation policy, planning, and investment decision making in the Region is the Genesee Transportation Council (GTC). GTC is the designated Metropolitan Planning Organization (MPO) for the nine-county

Region. GTC has been designated by the Governor of New York State as the MPO responsible for transportation planning in the G-FL 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 are the Long Range Transportation Plan, Unified Planning Work Program and the Transportation Improvement Program. These documents address both the long and short term transportation challenges facing the Region and propose actions to address these items.

4.6.a.i The Long Range Transportation Plan

The Long Range Transportation Plan (LRTP) provides a 20-year analysis of existing and projected transportation system capabilities, issues and opportunities, as well as alternatives to address these issues and maximize opportunities. This assessment is performed in the context of the eight major transportation planning focus areas established by the federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), enacted in 2005. SAFETEA-LU (which expired on September 30, 2009 and has been extended) 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 2035 (LRTP 2035)* was adopted in June 2011. *LRTP 2035* will guide the allocation of an estimated \$4.8 billion in federal and state transportation funds in the G-FL Region for the next nearly 25 year period.

4.6.a.ii The Unified Planning Work Program

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

Planning projects completed or currently underway which reflect the intersection of transportation and economic development in the Region are Center City Tourist/Visitor Circulation and Pedestrian Wayfinding Study; Regional Tourism Signage Study; Route 14 Truck Study; Goods Movement Planning; Optimizing Transportation Through Efficient Use of Infrastructure; and several corridor studies and circulation, accessibility, and parking plans. The UPWP is updated annually.

Two components that were funded through the UPWP were the Regional Goods Movement Strategy and the Transportation and Industrial Access site reports. The Regional Goods

Movement Strategy aims to develop a strategy to further strengthen the regional transportation network as a competitive advantage of the Region in recruiting and retaining firms, with special attention paid to traditional and emerging-technology manufacturing firms and the vibrant agricultural industry.

The Regional Goods Movement Strategy is currently underway. Substantial outreach has been conducted with stakeholders in both the private and public sectors in the form of focus group meetings, steering committee formation, on-line surveys, and in-person interviews. Accomplishments to date include a Regional Freight and Economic Profile Technical Memorandum in conjunction with a Needs Assessment and SWOT Analysis. Initial recommended alternatives have been developed for near-, mid-, and long-term improvements and strategies. The final recommended alternatives will advance the Region's freight transportation system as a distinguishing factor for increasing global competitiveness and maximizing economic growth.

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

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

4.6.a.iii The Transportation Improvement Program (TIP)

The Transportation Improvement Program (TIP) identifies the timing and funding of all transportation improvements involving federal funds over the next five years for the Region. These projects typically emerge from the UPWP planning process and must be consistent with the overall objectives and strategies identified in the LRTP. The TIP is a dynamic document; amendments occur when new projects are identified through federal discretionary programs or modifications to existing projects are deemed necessary. The 2011-2014 TIP was adopted in June 2010. The TIP is typically updated every two years.

4.6.a.iv Passenger and Freight Rail

One of the transportation funding priorities of the new federal administration is high speed passenger rail. While much work remains to be done, funding is being pursued to develop high speed passenger rail service along the Empire Corridor between Buffalo, NY and Albany, NY. A

high speed rail corridor running through the Region would help expand the market for both consumers and employees and further “shrink” the Region through the reduction in travel times.

In February 2009, the NYS Department of Transportation completed its first rail plan in 22 years. The plan articulates a vision for the state’s future rail system, making it a preferred choice for shippers to connect to national and international markets. It advocates for a continued and improved partnership between government and private rail operators. An enhanced freight rail system in the Region will allow businesses located here to better compete in the global economy.

4.6.a.v Mohawk-Erie Multimodal Transportation Corridor Study

The Mohawk-Erie Multimodal Transportation Corridor Study is currently underway with the aim of developing a corridor master plan. The master plan will develop a vision for the corridor based upon background data and economic and transportation assessments. The Mohawk-Erie corridor serves the metropolitan areas of Albany, Utica, Syracuse, Rochester, and Buffalo and continues into both Boston and Cleveland. The study is being led by the New York State Department of Transportation and the New York State Thruway Authority. Four Regional Project Advisory Committees, made up of key regional stakeholders, have been formed to help guide the development of the plan.

4.6.b Telecommunications

Telecommunication systems electronically transmit messages and data from one point to another. Telecommunications allows individuals and businesses to communicate efficiently and effectively. The identification, connection and development of telecommunications infrastructure are critical in the support of current and future economic development in the Region. Telecommunications infrastructure includes broadband, fiber optic circuits, and cellular telephone and communication service.

Increased broadband service or the installation of fiber optic circuits can be instrumental in attracting and retaining businesses and industries within the Region allowing for improved connections to the global economy and improving the quality of life. The Region has identified telecommunications as crucial to economic development and strategies to bolster it are being pursued both regionally and at the county level. Several counties have completed inventories and assessments of their respective telecommunications network. Many counties have also identified further telecommunications planning and implementation as part of their CEDS priorities, identified in Chapter 5. Regional discussion also continues regarding the development of a regional telecommunications infrastructure development plan to guide private sector investment in telecommunications throughout the Region. A significant telecommunications initiative within the Region is the construction of the fiber optic ring in Ontario County.

4.6.c Energy

4.6.c.i Traditional Energy

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

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

Each of the regional utility companies works closely with economic development officials to assist in providing energy incentives and other programs to facilitate the attraction and retention of business and industry within the Region. The section below provides a general overview of the economic development programs currently offered by RG&E/NYSEG and National Grid.

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

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

In addition to these economic development incentives, NYSEG and RG&E have recently launched three new energy efficiency programs. They are the Commercial & Industrial Rebate Program, the Small Business Energy Efficiency Program, and the Energy Efficiency Program for Multi-Family Residences. Details regarding these programs are available online at www.nyseg.com and www.rge.com, and through the Energy Efficiency Rebate Hotline at 1.800.995.9525.

National Grid- A large number of economic development programs and incentives are available for National Grid customers. Energy pricing incentives are available through pricing discount programs and several location based incentive programs to encourage businesses to expand or relocate to New York State. Energy efficiency programs are also available to encourage commercial and industrial customers to install high efficiency energy measures, helping to reduce operating costs and increase productivity.

Programs are also in place to assist companies that are in need of revitalizing older facilities, including incentives for capital investment, brownfield redevelopment and industrial building redevelopment. Additional information regarding these and other National Grid economic development programs is available online at <http://www.shovelready.com/>.

4.6.c.ii Alternative Energy/Green Building

Wind energy and the development of wind turbines remains a priority within the Region. Several wind farms are already present within the Region and a push has begun to develop more efficient

methods of connecting the electricity generated from the wind farms to the national electric grid. Businesses within the Region are also working on the development of small scale wind turbines to alleviate size concerns and make small-scale projects viable.

The G-FL Region has a promising alternative energy cluster, due to its advantage in precision manufacturing, innovative companies, a highly trained workforce and university research, including the efforts of RIT-CIMS and the many alternative energy and sustainability programs discussed previously in section 4.5b. The Region is a vital center of fuel cell development, with operations by Delphi, General Motors and Harris RF. Furthermore, local skills at thin films and imaging companies, as well as support from centers like the NanoPower Research Labs at Rochester Institute for Technology can be translated to an advantage in solar energy and photovoltaic cell production. In addition, the Rochester Institute of Technology Center for Integrated Manufacturing Studies has been working with many alternative energy companies in efforts to improve efficiency and reduce waste materials, helping them stay competitive within the global economy.

Individual alternative energy projects are also moving forward in the Region. The ethanol plant in the Town of Shelby (Orleans County) has been in operation since 2007. The plant utilizes existing technology for using corn to produce ethanol and is also taking advantage of new developments in cellulosic ethanol production and using woody debris and plant fiber to create ethanol. Other alternative energy projects within the Region include the Mill Seat landfill in Monroe County and the Seneca Meadows landfill in Seneca County, which are both utilizing methane produced from the landfills for power generation. The Wayne Industrial Sustainability Park has also become a model in the promotion of alternative energy uses and the connection between alternative energy and economic development.

Many businesses and organizations within the Region, are also taking further steps toward being environmentally friendly. There are twenty (20) LEED-certified projects in the Region including the Medical Arts Building, Strong National Museum of Play, Golisano Library, Frito-Lay Service Center, CFNA Rochester and the HSBC Dewey Avenue branch, all within the City of Rochester. Additional LEED-certified projects in the Region include the Summit Federal Credit Union in the Town of Brighton, the Macedon Goodwill Store in the Town of Macedon, Seneca Meadows Education Center in the Town of Seneca Falls, and Wayne-Finger Lakes BOCES in the Town of Williamson, NY. Furthermore, the Region has fifty-seven (57) registered LEED projects, which have yet to be completed and certified, but are aiming for LEED certification.¹⁰

4.6.d 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 650,000 individuals in Monroe, Genesee, Livingston, Ontario, Orleans and Wayne Counties and has a storage capacity in excess of 130 million gallons. With an average daily consumption of

¹⁰ United States Green Building Council <http://www.usgbc.org/LEED/Project/CertifiedProjectList.aspx>

approximately 57.5 million gallons, there is enough water stored within the MCWA conveyance system to meet demand for over two days in the event of a system failure.

Water supply for the City of Rochester comes primarily from Lake Ontario, but that supply is supplemented by water from Hemlock and Canadice Lakes, two Finger Lakes which are located south of the city. The Base Charge for water was \$2.57/1,000 gallons, although this charge varies between residential and bulk rate users.

Outside of Monroe County, water is provided by the MCWA on a retail basis to thirteen towns and villages in Genesee, Livingston, Ontario and Orleans Counties and on a wholesale basis to eleven towns and villages in Genesee, Livingston, 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.

Water districts that are located outside of the MCWA service area obtain 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.

4.6.e Wastewater

4.6.e.i Monroe County Pure Waters Program: A Model Worthy of National Merit

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

The sewer system in Monroe County was separated into four sewer districts; solutions to the sewage problems included significant upgrades to the Frank E. Vanlare Treatment Facility at Durand-Eastman Park in conjunction with gradual consolidation of other regional facilities. The most notable of these solutions, however, was the Rochester Pure Waters Combined Sewer Overflow Abatement Program (CSOAP) and tunnel system. The CSOAP project was designed as both a storage facility and conveyance vessel intended to relieve Rochester's antiquated combined sewer system, which has components dating back over 90 years. Construction of the first of three components of the system began in 1975 and the entire deep tunnel system was fully operational in 1993. While the entire project cost was over \$550 million, the project has effectively saved the City and County enormous resources by averting the street and sewer construction that would have been necessary if a traditional approach had been used.

Furthermore, CSOAP has allowed for the systematic phasing out of 35 overflow sites and nearly 30 small and ineffective treatment plants throughout the County.

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

4.6.e.ii Outside of Monroe County Pure Waters Program

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

According to the New York State Department of Environmental Conservation, there were 37 secondary and 28 tertiary treatment facilities operating in the G-FL Region. Both industrial and residential wastewater can be treated effectively through such systems, although tertiary systems are preferred when handling high amounts of industrial and/or urban wastewater. The capacity of these facilities and the treatment processes employed within them are routinely assessed by state and local officials in order to ensure that the systems in place are adequate to meet the demands of the households and businesses being serviced by them. In some instances, older treatment facilities are being brought off-line in an attempt to increase service and cost efficiency through facility consolidation. In other instances, new facilities are being constructed in order to meet the demands of growing populations, to supplement or replace aging facilities or to provide service to communities plagued by failing on-site septic systems.

In addition to the public health and environmental benefits of effective water and wastewater facilities, there are economic development implications as well. There is a strong link between water and wastewater capacity and the ability of the Region to attract and retain business and industry. Without adequate water and wastewater capacity, firms are unable to expand or to locate at specific sites and will likely look elsewhere, stifling economic development in the Region. To better understand what sites are best equipped with adequate water and wastewater capacity, G/FLRPC collected regional water and sewer data as part of the Finger Lakes Open Lands Conservation Project.

4.7 Brownfield Redevelopment

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

- The protection of human health and the environment;
- Increased tax base;
- Restored or replaced dilapidated buildings and sites;
- Job creation;
- Strengthened economic centers;

- Utilization of existing infrastructure; and
- Prevention of the spread of contaminants.

New York State's Brownfield Opportunity Areas (BOA) Program provides financial and technical assistance to municipalities that can be used to complete revitalization plans and implementation strategies for areas affected by brownfield sites. BOA projects in the Region include areas in the Village of Perry, the City of Batavia, the City of Rochester, the Towns of Penfield/Irondequoit, and the Village of Macedon. The Village of Perry program is anticipated to facilitate redevelopment of potential brownfield sites located in the Village's business district so as to stimulate economic development and job creation while also promoting compact, in-fill development. Monroe County is also examining a number of tax foreclosed brownfield properties in various locations throughout the County for their suitability for remediation and redevelopment.

Brownfield redevelopment is also occurring within the Region outside of the BOA program. The City of Rochester intends to complete an Implementation Strategy and Site Assessment for an approximate 30-acre study area characterized with 13 brownfield sites located on Anderson Avenue and Goodman Street. The City has also completed a study to examine a 394-acre site west of the Genesee River at the intersection of Lyell, Lake and State Streets. The City of Rochester also maintains a brownfield revolving loan fund to address brownfield redevelopment within the City of Rochester.

Many counties within the Region have also been actively working to secure funding to address brownfield issues within their communities. Orleans County has received grant funds from the New York State Department of Environmental Conservation (NYSDEC) to investigate environmental contamination at a 35.6 acre property in the Village of Medina, which is anticipated to have high levels of lead contamination. Livingston County is involved in two on-going environmental remediation projects. Remediation efforts are also on-going regarding multiple sites within Monroe County.

Ontario County has two ongoing remediation projects; one in the Town of Victor and the other in the City of Geneva. Seneca County is involved in clean up programs for several brownfield sites within the County and is working to secure a Brownfield Opportunity Areas grant to address remediation and redevelopment. Wyoming County has identified several brownfield redevelopment projects as part of their priority projects listed in Chapter 5, which includes the Perry Brownfield Opportunity Program. Wayne County has established a brownfield cleanup program, with projects underway in the Town of Sodus and the Village of Macedon. Work is also being done by the Wayne County IDA to address potential brownfield sites, which are delinquent on taxes, in an attempt to redevelop the parcels and return them to the tax-rolls. Brownfield remediation work is also ongoing in Yates County at the former NYSEG plant on Water Street in Penn Yan, in the hopes of preparing the site for future development.

Additional brownfield sites exist in many towns and villages in the Region, and appropriate remediation and redevelopment of these sites should be encouraged and facilitated so as to accrue the financial, environmental, economic development and land use benefits afforded through brownfield reuse and redevelopment.

To this end the City of Rochester has been successful with its brownfield assistance program, which provides support for businesses and developers in the investigation of potential redevelopment sites for contamination. The objective of this program is to provide a way for businesses and developers to obtain the environmental information needed to make redevelopment decisions without taking on the financial burden of the investigation costs. Funding is provided by the Environmental Protection Agency and potential developers are not financially responsible should they decide to walk away from a site.

4.8 New York State Canal System

4.8.a Erie Canalway National Heritage Corridor

The Erie Canalway National Heritage Corridor was established in December, 2000 and consists of the New York State canal system and the 234 municipalities that are connected by the Erie, Champlain, Oswego and Cayuga-Seneca Canals and Cayuga and Seneca Lakes.

The establishment of the Erie Canalway National Heritage Corridor helped bring together federal, state, and local governments and other partners in efforts to develop and implement a preservation and management plan for the corridor. The plan was completed in 2006 and identifies six goals: express the corridor's historic and distinctive sense of place, ensure the corridor's natural resources reflect the highest standards, achieve maximum scope and diversity with recreation opportunities, educate current and future generations to value the corridor's heritage, develop the corridor's economic growth and heritage development to be self-sustaining, and establish the corridor as a "must-do" travel experience for visitors.

The Erie Canalway National Heritage Corridor continues its efforts to successfully implement the above goals. Day to day activities of the Corridor include: conserving natural resources, promoting recreation, interpretation and orientation, tourism development and marketing, and economic revitalization.

Economic revitalization undertakings emphasize heritage development; a strategy focusing on place-based investments through actions that demonstrate respect for the people, the place and the past. In 2010 over 300 events were held within the corridor helping to generate an economic impact of \$380 million. Efforts also continued on several strategies including: building awareness and understanding, strengthening community capacity, stimulating economic revitalization and heritage tourism, and reinforcing the corridor's distinct sense of place.

4.8.b New York State Canal Corporation

The New York State Canal Corporation is a subsidiary of the New York State Thruway Authority and operating and maintenance expenses are supported by Thruway toll revenue. The goal of the Canal Corporation is to develop the Canal System into a world class recreationway, fostering recreation, tourism and economic development and preserving the natural and historical environment of the Canal System.

Through its Canal Revitalization Program, the Canal Corporation has helped develop canal harbors, improved public access through Canalway Trail projects, and helped implement local canal projects throughout the state. Two projects are currently underway within the Region: the

rehabilitation of the west guard lock in Monroe County and the lower miter gate in Seneca County. The Canal Corporation, along with its partners, continues efforts to promote the Canal System and increase opportunities for tourism and economic development.

4.8.c Western Erie Canal

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

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

Main Street Basic Training and New Manager Orientation, Resource Team Visits, and Work Plan Workshops have been provided to the three inaugural designated Main Street communities of the WECMSP: the Village of Albion in Orleans County, Village of Lyons in Wayne County, and City of Lockport in Niagara County. Additionally, a comprehensive Regional Resource Guide has been completed, providing an inventory of grant opportunities, organizations, and resources to assist communities with Main Street revitalization.

4.9 Village Main Streets

Village main streets in the G-FL Region are tremendous assets and opportunities for encouraging tourism, historic preservation, small business development, and in turn, economic development. Throughout the Region many villages continue efforts to revitalize their Main Streets to improve opportunities for small business and economic development. A selection of Village Main Street revitalization efforts underway is discussed below.

Within Livingston County the Village of Dansville and Lima have been awarded funding through the New York Main Street grant to focus on Main Street revitalization projects. The Alliance for Business Growth, a partnership between the economic development offices of Livingston and Wyoming Counties, offers assistance to small business owners in these two counties in an effort to encourage and support entrepreneurship, to encourage revitalization and preserve the vitality and character of main streets throughout the counties.

In Orleans County the Villages of Albion, Medina, and Holley have been effective in addressing Main Street revitalization issues. The Village of Albion was one of three inaugural communities selected for funding under the WECMSP. Within the Villages of Medina and Holley downtown

business associations have been driving the Main Street revitalization process. All three communities have worked closely with the Orleans County IDA to identify resources and opportunities available to assist revitalization efforts.

Wayne County villages have also been active in efforts to obtain funding for Main Street revitalization. The Village of Sodus has been awarded funding under the New York Main Street program and the Village of Savannah successfully completed their New York Main Street grant revitalization project. Additionally, the Villages of Palmyra and Clyde currently have projects underway along their Main Streets. The Villages of Warsaw and Arcade have been active within Wyoming County regarding community development issues focusing on façade improvements and the acquisition of grant funding. Additionally, the Village of Perry is actively involved in a New York State Brownfield Opportunity Area project with the hopes of engaging the community and obtaining funding for future main street revitalization projects. Within Yates County the Villages of Penn Yan and Dundee currently have projects and programs underway to improve community development and help attract businesses to Main Street.

4.9.a Business Improvement Districts

Business Improvement Districts (BID) exist within the Region to assist in the economic development efforts of their communities and assist in the attraction of business and investment. The following section provides a brief overview of the activities being done by each of the regional BIDs.

Batavia Business Improvement District- The Batavia BID has completed streetscape improvements along Ellicott Street, a major gateway into the City. The BID has worked on increasing events within the downtown to help increase the number of visitors and residents coming into the City. A focus of this has been improving the public market and concerts in Jackson Square. The BID is also continuing its efforts regarding business attraction and retention within the district with a focus on entertainment and food businesses. Increasing housing within the district and façade improvements also remain priorities.

Canandaigua Business Improvement District- The Canandaigua BID continues its efforts to secure grant funding for streetscape, façade and signage improvements. Efforts also continue regarding beautification, public safety, and visitor attraction within the district. The BID is also actively working with other local economic development organizations to assist in the retention and further attraction of businesses to the district. To this end the BID is developing a survey to help determine what businesses and services are needed within the district.

Geneva Business Improvement District- The Geneva BID continues to sponsor events throughout the year and provides streetscape improvements including hanging baskets, benches and trees to draw people into the City. The BID also continues work on façade improvements throughout the district. Efforts are underway to improve the signage of the pedestrian tunnel to help increase pedestrian access to Seneca Lake from the district. Additionally, the BID continues to work closely with local economic development partners including the City of Geneva and Hobart and William Smith Colleges in efforts to market the district helping to increase the viability of district businesses and attract new investment.

Ontario Business Improvement District- The Ontario BID continues to work closely with the Town of Ontario to develop small scale projects within the district. A vision plan for the BID has been completed, with assistance from the Town, and work has commenced on small projects such as ADA railings. The BID also continues to work on business attraction to help fill vacancies within the district. Beautification efforts are also ongoing to help bring visitors to the district.

Webster Business Improvement District- The Webster BID continues to sponsor and hold events throughout the year to help attract residents and visitors into the Village. The BID also has continued its partnership with the School District, Village and Chamber, as part of the Webster Community Coalition for Economic Development. Rehabilitation of the district remains a strong focus as the BID continues to focus on façade renovations and streetscape improvements. Business attraction and retention remains a key goal for the BID as well.

Williamson Business Improvement District- The Williamson BID has completed their Main Street grant to address façade improvements and streetscape work, including new benches, bike racks, and other sidewalk enhancements. Federal stimulus funding helped the BID replace a sidewalk and improve drainage within the district. The BID is currently looking to secure funding for a mural within the district. Efforts also continue regarding retention and attraction of businesses and investment into the district.

4.10 Tourism

The tourism promotion agencies within the Region are charged with marketing the Region to attract visitors and to draw consumer spending into the Region. Tourism has a huge impact within the Region through consumer spending on food, entertainment and lodging as well as through job creation and investment from the tourism industry. A recent study by the Oxford Economics Company found that visitor spending in New York State in 2009 was over \$45 billion. For Monroe County, the total 2009 visitor spending was over \$887 million making it the county with the largest amount of visitor spending within the nine-county Region.¹¹ Support and investment of the many attractions in the Region also further improves the quality of life of the Region helping to attract and retain an educated workforce. Cornell University also recently completed a report entitled “Consumer Decision Making for Tourism in New York State.”¹² The report analyzed secondary research and surveyed consumers interested in traveling to New York State. Their findings show the important of branding and the successful recognition that the Finger Lakes Region, and Finger Lakes wine trail specifically, have achieved. The report can also help the Region become more efficient with their tourism marketing dollars.

Attractions in the Region include; Letchworth State Park, Darien Lake, the Finger Lakes, the Erie Canal, the City of Rochester, as well as local wineries, outdoor activities, and the many town and village events and festivals held throughout the Region. Based upon discussions with the nine regional tourism promotion agencies both the number of visitors and tourist spending

¹¹ <http://www.fingerlakes.org/uploads/pages/pdf/NYS%20Tourism%20Economic%20Impact%20-%20State%20and%20Regions%202009.ppt>

¹² <http://fallgetaways.iloveny.com/cornellreport/>

increased during the 2010 compared to the 2009 levels, which were lower than usual due to the national economic downturn.

Many of the Region's tourism promotion agencies are looking to increase regional collaboration to improve the efficiency of tourism marketing within the Region. The limited tourism promotion budgets available and the increased usage of social media has led to many Tourism Promotion Agencies within the Region utilizing social networking sites, such as Facebook and Twitter, to help promote the Region.

Chapter 5 - Development Actions, Efforts and Priorities

The following section itemizes the proposed actions, efforts and priorities of the Economic Development District. The plan of action, which is in the latter part of this document, provides an active plan to support, assist and supplement these efforts to further economic development in the District.

5.1 Genesee-Finger Lakes Region

A proper telecommunications infrastructure is crucial for the G-FL Region to aggressively compete in the rapidly changing global economy. In an economy where technology and communication are keys to success, effective and efficient communication systems can position a Region for growth. A connected region is necessary to facilitate long-term economic development.

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

One issue affecting the Region with regard to telecommunications is the lack of knowledge that exists about current telecommunications infrastructure and the absence of a regional development plan. Currently, Genesee, Livingston, Monroe, Ontario, Seneca, Wyoming and Yates Counties have completed telecommunications studies, but the level of detail varies between each county. 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 also needs to be completed for Orleans and Wayne Counties. The addition of this information would provide the necessary knowledge to identify and prioritize improvements to the regional network.

In order to ensure that the Region's telecommunication network is operating at its optimum capacity, funding from EDA and other sources 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, statewide, 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.

Another regional economic development project discussed during the 2010 CEDS Stakeholder Input Session is the development of a regional economic development analysis and asset map. This analysis would include in-depth data development, infrastructure inventory, economic development asset analysis, and an economic development program and organization overview. This report would provide an overview of the economic development efforts of the Region to help identify strengths, weaknesses, opportunities, and threats. This information would allow future economic development investments to be made efficiently and position the District to improve service delivery.

Small business growth and development is recognized as a major source of new job creation within the Region and the District continues to support the many regional organizations and research institutions working to foster innovation and commercialization. To help further these efforts, the District is targeting the establishment of a Regional Innovation Cluster Development project, which would bring regional partners together to connect with companies and research institutions to identify dormant and available technology that can be used to develop new products and services that are not currently being utilized. These assessments would improve efficiency and allow critical resources to be targeted to companies and technologies poised for growth.

Closely aligned with these efforts, and currently in progress, is the Regional Entrepreneur Action Plan (REAP) initiative, which is addressing entrepreneurship efforts in 19 upstate New York counties including all nine counties within the G-FL Region. The goal of the REAP initiative is to identify and address the innovation and entrepreneurship service gaps within the region with the aim of catalyzing the development of high growth companies that can attract additional investment capital and to foster a thriving entrepreneurship and innovation ecosystem within 19 upstate New York counties.

The regional economic development projects are identified below in Table 25.

Table 25- Genesee-Finger Lakes Region Priorities				
Priority Number	Proposed Project	Funding Sources	Total	Start- Finish Dates
GFL-1	Regional Telecommunications Development Plan	Federal, State, Local	\$300,000	2011-2012
GFL-2	Regional Economic Development Analysis and Asset Map	Federal, State, Local, etc.	\$200,000	2011-2012
GFL-3	Regional Innovation Cluster Development	Federal, Local	\$1,000,000	2011-2012

5.2 Genesee County

Genesee County and, by a recent federal definition via the US Census Bureau designating the county as the “Batavia Metropolitan” area, is the connecting community located between both the Buffalo/Niagara and Rochester/Finger Lakes Regions of upstate New York. With a combined population exceeding 2.1 million people within easy commute distances – this broader Upstate New York Buffalo to Rochester Super-Region rivals the size, capabilities and capacity of the Pittsburgh Metropolitan Statistical Area. 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 and within a days drive of 125 million residents including all of the Northeast and Canada – Genesee County and the Batavia Metropolitan area offers several key competitive strengths as a business location.

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 with easy commute distances from Rochester and Buffalo; abundant and cost effective real estate including five shovel-ready corporate/tech oriented industrial parks including: The 34 acre Upstate Med & Tech Park, a life sciences /bio-medical park located across the street from Genesee Community College which, also located within the park, is the 43,000 square foot Dr. Bruce A. Holm Upstate MedTech Centre “accelerator” facility for young, commercializing, bio-medical and high tech oriented enterprises.

Genesee County also is home to the 202 acre Genesee Valley Agri-Business Park, a one of a kind, agriculture and technology focused park dedicated to food processing. The Genesee Valley Agri-Business Park is New York States first shovel ready park dedicated to agri-business and renewable energy. In early 2011 Alpina Foods announced that it will build and equip a 28,000 square foot manufacturing facility at the agri-business park as part of a \$15 million investment that will create up to 50 new jobs.

Development efforts continue with the development and deployment of infrastructure within the 200+ acre Buffalo East Technology Park which is ideal for High Tech, Clean Tech and IT companies given its strategic location along the New York State Thruway as well as being located within the New York Power Authority’s Niagara Hydro-Power Zone offering high capacity low cost electric to companies.

A regionally transformative high tech/clean tech oriented project which has been under development the past four years, is the Western New York STAMP (Science and Technology Advanced Manufacturing Park) project. This project is undertaking the effort to develop a 1,340 acre MegaSite high tech/clean tech industrial park which would create opportunity for all of Western New York from Rochester to Buffalo. The STAMP project is Western New York’s equivalent to the Luther Forest Technology Campus MegaSite in Saratoga County which is home to the GlobalFoundries \$6.2B/1,465 job semi-conductor chip fab factory which is currently under construction. Phase 2 (design and environmental) of the STAMP project will be completed by the fall of 2011. The STAMP MegaSite development project is located in the Town of Alabama approximately five miles north of NYS Thruway Pembroke Exit 48A. Development of this site is a significant effort and has strong regional support from many partners including Greater Rochester Enterprise (GRE) and Buffalo Niagara Enterprise (BNE). It has the potential to be transformational for Western New York offering the ability to attract large and mega projects in the high tech/clean tech/nano-manufacturing space similar to the success being experienced currently in the Capital District in Eastern New York State.

Genesee County continues to utilize the Genesee County Economic Development Strategic Plan, which was implemented in 2003, to help guide its marketing and development activities. During the first five years of the plan, Genesee County, the Batavia Micropolitan area, experienced record breaking economic development growth in terms of projects, capital investment and job creation commitments; beating expectations by as much as 277%.

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

Between 2006 and 2010 GCEDC participated in 160 projects, securing commitments to create 1,662 jobs and fostering \$444 million in investment within the County. GCEDC also remains active in economic development and marketing programs, including business retention and expansion programs and business attraction programs.

Agriculture remains a very strategic and targeted industry within Genesee County, with the development of the 202 acre Genesee Valley Agri-business Park nearly complete. Emerging industry clusters, including medical technology companies, have also been targeted to help establish a new economic base for the community. The GCEDC also continues to support small business, start-ups, and incubators within the county including the recent completion of the \$6.9M Upstate MedTech Centre "accelerator" facility. Efforts also continue to secure grant dollars for industry specific workforce development efforts within Genesee County and regionally as well.

Genesee County's priority projects, enabling the county's economic development strategic plan and associated strategic imperatives, are listed in Table 26.

Table 26- Genesee County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
G-1	Buffalo East Technology Park (232 acres)	GCEDC/ GGLDC	\$12.0 Million+ Federal, State, Local, Private	1,400
G-2	Genesee Valley Agribusiness Park (202 acres)	GCEDC/ GGLDC	\$10 Million Federal, State, Local, Private	1,200
G-3	The Upstate Med-Tech Project: Develop a Regional Med-Tech Business Park (34 acres) and Commercialization Center (Accelerator facility)	GCEDC/ GGLDC	Park: \$1.5-2.0M, Commercialization Center: \$7-\$8 Million Federal, State, Local	400
G-4	Develop Mega-Site High Tech/Clean Tech Advanced Manufacturing Park (WNY STAMP)	GCEDC/ GGLDC	\$150-\$225 Million Federal, State, Local	9,300
G-5	Re-development of the Batavia/Downtown Corridor	GCEDC/ GGLDC	\$5.0+ Million Federal, State, Local	Indirect
G-6	Develop Lower Cost of Power Solution(s): Cogeneration, Alternative Energy to lower power costs businesses	GCEDC/ GGLDC	\$1 Million Federal, State, Local	Indirect
G-7	Assist Community Development via Main Street Projects, Housing issues and Quality of Life	GCEDC/ GGLDC	\$3 Million Federal, State, Local	Indirect

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. As a result, planning and development issues are aligned with Monroe County.

New York State has designated two of the three Livingston County-owned industrial sites in Avon and Dansville as Build Now - NY "shovel ready" sites. Additionally, two privately owned sites, one in Geneseo (the Valley at Geneseo) and one in Avon (the Livingston Industrial Complex), have also been designated as Build Now - NY "shovel ready" sites. Business attraction efforts to these and other privately held sites throughout Livingston County continue to reach regional and national site selectors. Through these marketing efforts, Barilla America NY selected Livingston County as the location of their second United States manufacturing operation. The attraction of Barilla America further enhances the county's strategic food and beverage industry cluster that includes Kraft, ADM, Sweeteners Plus and Seneca Foods.

Livingston County has partnered with Greater Rochester Enterprise (GRE), a public/private economic development partnership, to help market Livingston County for business location and growth.

The Livingston County Development Group, the marketing arm of the County Economic Development Office and Industrial Development Agency continues to utilize its website to promote available sites and buildings for potential tenants/buyers.

Agriculture and related agribusiness comprise a large portion of the county economy and 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. Livingston County completed its Agriculture and Farmland Protection Plan in 2006 that identifies the need to strengthen agricultural-based economic development.

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

Perdue, has established its first location in New York State in the Town of Livonia with the purchase of the former Lakeville Transfer/PACMA facility. The company plans an expansion of the feed and grain transfer and storage facility. Kraft, Livingston County's second largest private sector employer completed a \$4.7 million expansion of its *Lunchables* product line in 2009 creating 50 new jobs. These agribusiness investments illustrate the importance of the cluster to Livingston County in terms of both job creation and investment.

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

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

Livingston County also is home to American Rock Salt, resulting in a significant mining presence within the County. American Rock Salt provides approximately 200 jobs to the County economy¹³.

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. Small business assistance has been provided to help downtown revitalization in the Villages of Avon, Caledonia, Dansville, Lima, Livonia, Mount Morris, and Nunda. A grant award was received under the New York Main Street program by the Village of Mt. Morris in 2009 to help restore downtown buildings through 2011. Additionally, the Villages of Lima and Dansville secured funding for restoration of downtown buildings through the New York Main Street Program. The funding will run through 2012.

The Downtown Revitalization Programs operated by the Livingston County Development Corporation continue to be a priority for Livingston County. The County has emphasized local community engagement within their business attraction and revitalization efforts. Sign and Façade Design Guidelines were established in the Villages of Dansville, Geneseo, Lima, Mt. Morris and Nunda to enable business and property owners to apply for grant funding under the County's new Sign and Façade Improvement Program. The funding encourages new signage and façade renovations in the central business districts.

Additionally, a Livingston County Outflow Study has been undertaken to identify the goods and services that are currently being purchased outside of the County. The study will also provide a model of the economic impact on Livingston County if 10% of these purchases currently made outside of the County were instead purchased locally.

Financing is currently 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.

Reuse and redevelopment efforts are also underway in several Livingston County buildings. Several small manufacturing companies now occupy the former Foster Wheeler Energy Corporation building, which was left vacant in 2003. Efforts are also underway to rebuild and repair the Dansville Rail Line, which would position MISCOR to expand the company's operations.

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

The Livingston Area Transportation System (LATS), the County's public transit system, is a subsidiary of the Rochester Genesee Regional Transportation Authority (RGRTA). LATS provides fixed route public transportation throughout the county. Medical shuttles provide access

¹³ Due to data restrictions from the Quarterly Census of Employment and Wages these mining jobs are not displayed within Table 15 in section 3.4b.

to Livingston County and Rochester-area medical centers. Paratransit service is available for individuals with a disability who cannot travel to or from a LATS bus stop, or board, ride or disembark from the regular LATS bus for any reason. Livingston County was awarded a Unified Planning Work Program (UPWP) grant from the Genesee Transportation Council for a County Transportation Connectivity Plan. This project will examine the existing transportation network and provide recommendations for improving connections between people, jobs, goods and the marketplace.

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. The construction, by Livingston County, of a new 266-bed skilled nursing facility in Mt. Morris has been successful with the center offering a transitional care unit, adult day health care, hospice, memory care and bariatric care units. Renovations have also been completed at the outpatient Kidney Dialysis Center, serving those county residents in need of dialysis services and operated in conjunction with Noyes Memorial Hospital. In addition, the need to support community-based solutions to providing needed services for seniors will continue to be a priority.

Telecommunication capabilities and the ability to access data from any location are major components of the modern health care industry and knowledge based businesses. With this in mind the county has completed a comprehensive broadband study providing an inventory of existing telecommunications infrastructure and analyzing the current needs for government, schools, and businesses within Livingston County. Discussion is also underway about partnering with the Region, in the future, to develop a regional telecommunications development strategy.

Livingston County's priority projects are listed in Table 27.

Table 27- Livingston County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
L-1	Rebuild and Repair of Rail line to Dansville Properties	Livingston County IDA/G&W RR	\$2.5 million State, Local, EDA	100
L-2	Completion of Infrastructure at Crossroads Commerce Park, Avon	Livingston County IDA	\$1 million EDA, DOT, County	100
L-3	Multi-Tenant building at Dansville Industrial Park	Livingston County IDA	\$2 million EDA, New York State, County, Private	50
L-4	Entrepreneurship Venture Capital	Livingston County IDA	\$500,000 State, Local, Regional, Federal	Indirect
L-5	Entrepreneurship Training	Livingston County IDA	\$20,000 State, Local, Regional, Federal	Indirect
L-6	Downtown Revitalization	Livingston County Development Corporation	\$100,000 State, Local, Regional, Federal	Indirect
L-7	Buy Local	Livingston County Development Corporation	\$100,000 State, Local, Regional, Federal	Indirect

5.4 Monroe County

Monroe County's economic development team uses job creation, retention and expansion programs for existing businesses, as well as programs which provide attraction incentives and support services for start-up businesses and firms seeking relocation. A particular focus has been placed on the growth and attraction of the following sectors: high technology manufacturing, including optics and imaging; biotechnology; alternative energy and fuel cells; business information services; food and beverage manufacturing; and telecommunications.

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

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

Monroe County continues its partnership and marketing agreement with Greater Rochester Enterprise (GRE), a public/private partnership established to professionally market the Rochester Metropolitan Area and surrounding Region to business groups.

Supporting Activities and Infrastructure

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

Monroe County continues investment in the sewer, water and transportation infrastructure within the County. Infrastructure investments are developed based on established priorities/needs and are implemented through the County's Capital Improvement Program in coordination with the City of Rochester and local towns and villages. The proposed capital improvement program for 2011 will invest in highways, bridges and traffic engineering, improvements at the Greater Rochester International Airport and water infrastructure projects, amongst others. These investments will help address the aging infrastructure within the County and provide a foundation for future development to occur. The County also continues to focus on planning and development projects and policies related to energy and sustainability.

The implementation of the Monroe County Agricultural and Farmland Protection Plan continues and is viewed as a means to insure the continued vitality of agriculture in a predominantly metropolitan county. As part of the plan, a marketing program was introduced to encourage the purchase of products grown on Monroe County farms entitled "GROW MONROE". The program links consumers with Monroe County growers and provides both a label and branding program to both farm stands and farm markets.

Also in synergy with the plan, the Agriculture and Life Sciences Institute was created in 2007 at Monroe Community College (MCC) to better assist farmers, public officials, and residents on agricultural land use and commerce issues, and to provide education and training in agriculture. Students attending MCC who are interested in pursuing a career in an agricultural field can now register for two for-credit courses in agriculture; Introduction to Agriculture, and Introduction to Greenhouse Management. Students also have the opportunity to transfer to several area colleges and universities for an agricultural degree. The Agriculture and Life Sciences Institute is also actively seeking an opportunity to establish an associated degree program in agriculture as well as a training and workforce certification program for food and agricultural employees within the five surrounding counties. The economic impact of agriculture within Monroe County is significant with a total production value in 2008 of over \$89 million for all crops. The Farmland Protection plan continues to focus on maintaining and strengthening agriculture as an industry and tracking the conversion of farmland to other uses and related development pressures.

Renewable Energy for Economic Development

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

Mill Seat Landfill Bioreactor

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

It was determined that there was enough methane gas being generated to produce 4,800 kilowatts (kW) of power. In 2006, the County of Monroe began construction on an eight engine landfill gas fueled power plant. Initially, six 800-kW gensets were installed and the plant was commissioned in August of 2007. Subsequent gas modeling studies were conducted in 2008, and in 2009 two additional 800-kW gensets were installed bringing the total output of the original plant to 6,400 kW.

The Monroe County Legislature adopted in May of 2011 a resolution authorizing the design of an additional four genset 3,200-kW facility at the Mill Seat Landfill. The anticipated completion and start of operations for the new facility is January 2013. While initially the facility will operate four gensets, it is anticipated that the facility will expand to a total of eight gensets and a total of 6,400-kW of electricity production as methane production increases. The goal is to operate at 6,400 kW as early as 2015. The estimated cost of the new Power Plant with eight gensets is approximately \$12,000,000.

Also, with the creation of the new facility Monroe County plans to use the additional revenue to fund the creation of a thermal recovery plant to provide heating and cooling to stimulate economic development.

Currently there are 140 acres of County-owned, developable property adjacent to the landfill on Brew Road that would be suitable for economic development. Monroe County will use the free thermal energy from the power plant to entice companies to locate to the proposed business park. The available parcels for the proposed business park have water and sewer utilities, direct access to Interstate 490 and the New York State Thruway, and potential access to a county-owned fiber optic network. The County is also exploring other means to attract and retain prospective business through various green energy incentives associated with the power plant.

The Entrepreneurs Network

The Entrepreneurs Network (TEN) is an economic development initiative launched by Monroe County Executive Maggie Brooks and sponsored by the County of Monroe Industrial Development Agency (COMIDA). Small business, especially new ventures, is where most job

growth is occurring. TEN is part of a comprehensive strategy to drive long-term, sustainable growth built on retaining existing employer base and improving the success ratio of entrepreneurial start-ups.

TEN provides upstate entrepreneurs significant hands-on exposure to, and interaction with, national and regional business experts and funding sources. TEN has an exclusive, members-only class consisting of boot camps on securing equity investments and traditional financing, effective sales and marketing strategies, leadership and business strategy for today's competitive environment. TEN offers training, educating and networking to connect entrepreneurs, established firms, academic institutions and investment resources to help advance the regional economy.

Originally, TEN received most of its funding from two sources: COMIDA and Finger Lakes WIRED, a pilot program of the U.S. Department of Labor. This financial support helped cover the cost of TEN boot camps, however, the WIRED program concluded in 2009 and with it funding stopped. Since 2010, TEN operates as a program under management by High Tech Rochester. This allows for improved coordination of scheduling and programmatic interaction among entrepreneurial service providers. Several alternative revenue streams – grants, sponsorships, and membership fees are currently being established to help sustain TEN.

TEN has a 4-month cycle for its “classes” which consist of boot camps on key business topics. During each “class,” 15-20 entrepreneurs receive coaching from TEN instructors and other resource people in our network. They gain the knowledge needed to refine their business plan, build a financial model to maximize profits, develop an effective go-to-market strategy, and obtain the financing needed to execute their business plan.

Candidates for the TEN program should be founders, senior executives, CEO's or hold a controlling position in an early stage technology, life science, and/or scalable high-revenue potential firms (in business less than ten years with revenues less than \$10 million), with business operations primarily in Upstate New York. Serial entrepreneurs, family-owned businesses, and businesses undergoing a leadership transition are eligible to apply to TEN. The geographic foot print served by TEN includes Rochester, Buffalo, Syracuse and Ithaca.

Now in its fifth year of operation, The Entrepreneurs Network continues to work with executives from new ventures and established companies in Upstate New York to provide them with the needed business expertise to succeed and grow their businesses. A total of 185 individuals have been assisted from 170 different companies through the TEN program series since 2006. A sample of success stories for TEN participants include the following: approximately half of the Western New York firms that were awarded under the Small Business Innovation Research/Small Business Technology Transfer programs are TEN alumni; four of the eight finalists of the 2011 Rochester Regional Business Plan contest, including the 1st and 2nd place winners are TEN alumni; and Rochester Angel Network, Western New York Venture Association, and Excell Partners each have TEN alumni in their respective investment portfolios.

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

Table 28- Monroe County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Funding and Sources	# of jobs projected to be created
M-1	Mill Seat Landfill Bioreactor	Monroe County DES	\$12,000,000 Federal, State, Monroe County	75
M-2	The Entrepreneurs Network	Monroe County Department of Planning and Development	\$300,000 Federal, County	150

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.

Overviews of each of the City of Rochester's priority projects are below.

Midtown Plaza

In partnership with the State of New York, the City of Rochester is moving forward with the revitalization of the Midtown Plaza properties in the heart of the City's central business district. Midtown Plaza consisted of approximately 1.5 million square feet of vacant, office and retail buildings covering 8.6 acres. The project involves the demolition of most of the Midtown buildings, inclusion of new streets and open space and creation of 6 or 7 development parcels. In 2009, the City completed the State Environmental Quality Review Act process for the redevelopment plan. The amended Midtown Urban Renewal Plan was adopted by the Rochester City Council in November 2009.

The \$34.1 million asbestos remediation contract was awarded to Cambria Contracting Inc., in May 2009 and the \$1.69 million air monitoring contract was awarded to Paradigm Environmental Services Inc. Asbestos removal commenced in late August 2009 and was completed in September 2010. The demolition contract was awarded to Ontario Specialty Contracting, Inc. in 2010. Demolition commenced in late August 2010 and will be completed before the end of this year. The remediation and demolition phase is being funded by the State of New York at a cost of \$55 million.

The City of Rochester has currently identified \$4,654,500 in federal assistance for the Midtown project. In February 2009 U.S. Congresswoman Louise M. Slaughter (D-NY-28), Chairwoman of the House Committee on Rules, announced \$950,000 in funding for transportation improvements relating to the Midtown Project from the 2009 Omnibus Appropriations Act. In September 2009, U.S. Senator Kirsten Gillibrand announced that the Senate passed the Transportation, Housing and Urban Development Appropriations Bill, which included \$340,900 to assist with revitalization of the former Midtown Plaza site. An additional \$1,363,600 was included in the Federal fiscal year 2010 budget through appropriations from the transit bill and an additional \$2 million for transportation infrastructure was obtained in fiscal year 2011. The City submitted an application to the U.S. Economic Development Administration for a \$3.4 million grant from the Economic Development Assistance Program for infrastructure improvements. The City continues to seek assistance through various federal programs to assist with infrastructure costs to construct streets, utilities and open space.

At the onset of the project, PAETEC Holdings Corp. agreed to construct a new 222,500 square foot building at the corner of Main Street and Clinton Avenue for their new world headquarters. Funding for the \$55,785,238 PAETEC project was identified as follows: \$17,392,107 in bank financing; \$14,893,131 in New Market Tax Credits; \$16,500,000 in HUD Section 108 loans (pending HUD approval); approximately \$8 million in CDBG funding; and \$5,000,000 in PAETEC equity. Construction of the PAETEC building was scheduled to commence in early 2012 and be completed in late 2013. PAETEC planned to bring over 800 employees to downtown and create over 400 jobs in the future. On August 1, 2011, Windstream Corp. announced plans to acquire PAETEC. The City of Rochester is currently in contact with Windstream in regards to their interest in moving forward with the new building upon acquisition of PAETEC.

In 2009, the City issued a request for proposals for purchase and redevelopment of the 17-story Midtown Tower. Under that process, the City selected a partnership formed by Christa Development and Morgan Management. The \$70 million redevelopment plans for the tower include 24 condominiums, 176 apartments and approximately 90,000 square feet of commercial space. The developer is seeking assistance from the HUD 220 program for project financing. The project will commence construction in late 2012 and be completed in January 2014.

Port of Rochester Redevelopment

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

Based on the LWRP, 2006 Port Master Plan, and the City's 2008 Marina development feasibility study the City is beginning the redevelopment of the 40 acre Port site through the combination of a new 120 slip marina basin development, public infrastructure improvements, commercial and residential development, and public waterfront access. Costs to construct the planned 6.8 acre public marina are estimated at \$8.5 million. Additional infrastructure costs including the

relocation of utilities, a new street and right of way construction including a new central connecting section of River Street, and a new public promenade are projected to total approximately \$15 million. When the costs of new buildings and relocation of some existing public facilities are included, the total public funding required for improvements to the 40 acre site is estimated at \$32 million. The City has initiated preliminary design and regulatory permitting for the project. Approximately \$2.7 million in NYS multi-modal transportation, NYS Environmental Protection Fund (Department of State), and federal Intelligent Transportation System funding has been secured for the Port redevelopment.

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

Photech Site

Located at 1000 Driving Park Avenue, the former Photech site is a 12.5 acre parcel of land that is currently owned by the City. This site was a former photographic film and photographic paper manufacturing facility. Manufacturing at the former Photech site ceased operation in the early 1990's, and the City acquired the site through tax foreclosure in 1997. The documented liabilities and potentially significant environmental remediation costs have discouraged redevelopment of the property. Total estimated demolition and cleanup costs are \$4.5 to \$5 million. The City's \$3.4 million environmental cleanup grant was approved in 2007 by the New York State Department of Environmental Conservation. In addition, during 2007, the City was approved for a \$200,000 USEPA brownfield cleanup grant for the Photech site.

The City has selected a consultant for the cleanup. The cleanup began in the winter of 2010. Over the past year, the City has teamed with LaBella Associates and LeChase Construction Services to complete asbestos abatement and building decontamination, followed by building demolition of the 15 former industrial buildings at the Photech site. The site will undergo additional subsurface environmental investigation and environmental cleanup. This final phase of the brownfield cleanup process is scheduled to be completed in late 2011.

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. The City has applied for approximately \$1.4 Million from the Economic Development Agency (EDA) Public Works grant program to support public infrastructure development on the site. 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. Basic site design was determined following a survey of developers that focused on industrial real estate market demand. Assuming the new buildings will occupy between nine and ten acres it is anticipated that the Photech Site will result in the creation of 180 to 200 new jobs.

Vacuum Oil Site

The Vacuum Oil site was a petroleum refinery and bulk storage facility approximately 24 acres in size and was located on the western bank of the Genesee River. The Vacuum Oil facility operated from the 1860's through the 1930's, and contained up to 135 storage tanks and process vessels and processed up to 4 million gallons of crude oil in the late 1800s. While a public trailway is located adjacent to the Genesee River, a significant portion of the former Vacuum Oil site contains vacant and underutilized land that is suspected of being contaminated with petroleum and other hazardous substances. In March 2008 the City's Brownfield Opportunity Area (BOA) planning grant for the former refinery site was approved by New York State Department of State (NYSDOS), and in March 2009 the City and NYSDOS finalized the BOA project work plan. This \$212,000 grant will fund 90% of the costs of studies and the development of redevelopment plans for the former refinery site and the surrounding area. Phase II of the BOA planning grant kicked off in April of 2011. Exxon Mobil, the successor company to the original refinery company, has signed a stipulation agreement with the New York Department of Environmental Conservation and has completed a site investigation of a portion of the former landfill. Significant planning, design, and infrastructure investment will likely be needed to redevelop this large riverfront site. An engineering design is now underway to convert the existing rail bridge into a pedestrian connection from the University of Rochester to the public trail located on part of the former Vacuum Oil Refinery site. The City expects it will need to make investments in strategic properties, improvements to the recreational access to the Genesee River waterfront and associated public trails, and complete design and construction of new roadways and utilities in order to maximize the economic and community redevelopment potential of the site.

666 Driving Park Avenue/DuPont site

This is an approximately 10-acre site located on Driving Park Avenue about one half mile east of Mt. Read Boulevard. The site is owned by DuPont, and was a former DuPont photographic film manufacturing site. All of the aboveground buildings and structures have been removed, and preliminary subsurface investigations performed by DuPont have documented several areas of contamination that need further investigation and/or cleanup. At the request of the City, DuPont entered into the New York State Department of Environmental Conservation's Brownfield Cleanup Program, and is in the process of completing a remedial investigation. The City is attempting to find a suitable industrial or recreational re-use for the site, and expects to work with DuPont on the remaining remediation work required.

Emerson Street Landfill Area – McCrackenville/Emerson Street

This is an area on the former Emerson Street Landfill located on the north side of Emerson Street. The City has entered into an Order of Consent with the New York State Department of Environmental Conservation (NYSDEC) which requires the City to perform soil vapor intrusion estimates at properties on the former Emerson Street Landfill. The cost for assessing, investigating and mitigating FESL-related volatile organic compounds (VOCs) or landfill gases will be paid for by the City of Rochester for all landowners that participate in the program. The Consent Order also allows the City to complete other related investigation or cleanup measures. Approximately 22 acres of the former landfill remain undeveloped. Portions of the undeveloped area may be appropriate for development, however utility and street roadway infrastructure is

needed to support any new facilities. Site environmental and geotechnical considerations may limit commercial or industrial development to the northern and southern portions of the site which comprise 6 to 10 acres. Investigation and remedial activities will take approximately 2 to 3 years to complete. The redevelopment site plan and subdivision process could begin in approximately 18 to 24 months.

The City of Rochester's priority projects are listed in Table 29.

Table 29- City of Rochester Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
R-1	Midtown Plaza	City of Rochester	\$141 Million NYS and other	400-1200
R-2	PORT of Rochester	City of Rochester	\$146 Million Local, Private, State, EDA	300
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	666 Driving Park/DuPont site	City of Rochester	TBD Local, State, EDA	TBD
R-6	Emerson Street landfill area	City of Rochester	TBD Local, State, EDA	TBD

5.6 Ontario County

In 2010, the Ontario County Office of Economic Development/Industrial Development Agency (OED/IDA) completed a draft update to the Ontario County, NY Technology-Led Economic Development Strategy. The update focused on the evaluation of the state of the County and the development of a strategic approach.

The updated plan identified three layers of technology initiatives: innovation and technology; internal harvesting and talent; and investment and teamwork. These layers, termed the IT3 Framework, helped to guide strategy recommendations.

Innovation and technology recommendations include stabilizing and growing the three technology parks (the Technology Farm, College of Nanoscale Science and Engineering's Smart

System Technology and Commercialization Center of Excellence [formerly Infotonics Technology Center], and the Seneca Energy Park); continuing to develop the open access ring; and continuing to improve the reliability of electricity through “smart grid” implementation.

Internal harvesting and talent recommendations include improving business to business opportunities; cultivating small entrepreneurs and home-based businesses; and continuing innovation based training for incumbent workers.

Investment and teamwork recommendations include the development and promotion of key sites; tying into federal, state, and regional foreign direct investment programming and regional attraction efforts; and structuring County organizations to institute the technology-led strategy.

With these recommendations in mind Ontario County continues its efforts to cultivate networks of angel financiers, venture capital funds and site location consultants making Ontario County present and prominent on their lists. The County also continues to value the recruitment of talent just as much as jobs and understands that improving the quality of life can help attract and retain a talented workforce.

Agriculture remains a critical industry for Ontario County and the County has identified several strategies to support agriculture including: maintaining the active farm land base by keeping farming a viable and preferred economic activity; enhancing relations between local government and farm managers; introducing new crop, product, and farm-based income-generating opportunities to sustain Ontario County’s agriculture diversity; fostering public outreach about agriculture and access to local food; cultivating progressive and sustainable business & environmental practices; and encouraging new farm entities while promoting agriculture workforce development. Ontario County continues to work closely with the Cornell Agriculture and Food Technology Park on these and other agriculture efforts.

Cornell Agriculture and Food Technology Park

One of the OED/IDA’s more recent projects was the Cornell Agriculture and Food Technology Park in the City of Geneva. The over 70 acre tech park is located adjacent to the Cornell/NYS Agricultural Experiment Station. Incubator services for startups and sites for large and small companies are available. The tech park houses biotechnology research and service firms, as well as small food processing manufacturers. The first 20,000 square foot “flex-tech” incubator building, termed the Tech Farm, offers offices, wet labs and pilot production facilities. Opened in late 2005, the Tech Farm is now home to eight companies in a variety of enterprises. With the center currently at 80% capacity and future growth limited by a lack of available square footage and service space (loading docks, warehousing & refrigerated storage), a second building, the Finger Lakes Food Innovation Center has been proposed to provide space for larger pilot operations, distribution functions and to allow the Tech Farm to be utilized, as intended, for the development of research grade laboratories.

The construction of the Food Innovation building would allow for continued build out at the Technology Park, creating opportunities for both research laboratory applications and commercialization pilot plants. It would also fulfill a need for the type of service operations not available within the first center, creating further incentives for future Park development from

outside investors since vital distribution functions would be available within the Park. Ultimately, the Finger Lakes Food Innovation Center could be responsible for the creation of hundreds of new jobs along with sizable investments within the Region.

The Cornell Agriculture and Food Technology Park has the potential to diversify the County's manufacturing base into the food products sector and increase employment in high value added producer services. Finger Lakes Community College (located in Ontario County) has recently added an associate's degree program in biotechnology that will help train and educate local employees for careers in occupations generated by the tech park.

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

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

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

Create additional leasable square footage-

The development of the Finger Lakes Food Innovation Center building will provide additional space that can be utilized to house pilot production facilities, which are currently operating in the Tech Farm. Transferring these facilities to the Food Innovation Center will allow the Tech Farm to serve as commercial lab space for existing corporations. Adding this leasable space would therefore open up room for both pilot production as well as lab space. Critical to this goal is the completion of the USDA grape genetics lab, which would provide much needed cash flow for the potential expansion.

Extend water and sewer-

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

College of Nanoscale Science and Engineering's Smart System Technology & Commercialization Center of Excellence (STC) (formerly Infotonics Technology Center)

The Smart System Technology & Commercialization Center of Excellence (STC) is managed and supported by the College of Nanoscale Science and Engineering (CNSE) of the University at Albany - State University of New York (SUNY). The purpose of the center is to attract, retain and develop talent, promote regional collaboration between industries, universities and government, boost the regional economy, and create a world-class photonics and micro electromechanical systems (MEMS) prototype, pilot and low-volume MEMS manufacturing facility.

CNSE's STC offers the largest array of world-class MEMS-related solutions in the industry, all under one roof. STC maintains a 140,000-square-foot, state-of-the-art facility that includes over 50,000 square feet of certified cleanroom space with 150mm wafer production, complemented by a dedicated 8,000-square-foot MEMS and optoelectronic packaging facility.

CNSE is the first college in the world dedicated to research, development, education, and deployment in the emerging disciplines of nanoscience, nanoengineering, nanobioscience, and nanoeconomics. CNSE's Albany NanoTech Complex is a fully-integrated research, development, prototyping, and educational facility that provides strategic support through outreach, technology acceleration, business incubation, pilot prototyping, and test-based integration support for onsite corporate partners including IBM, TEL, Applied Materials, ASML and International SEMATECH, as well as other "next generation" nanotechnology research activities.

In sum, CNSE's more than \$7 billion Albany NanoTech Complex totals 800,000 square feet of cutting-edge facilities with 80,000 square feet of 300mm wafer, class 1 capable cleanrooms, with more than 2,500 R&D jobs on site.

An ongoing initiative of STC is assisting tenant and partner firms, as well as high-tech start-up companies in bringing innovations to market by helping them navigate a number of issues related to technology commercialization. STC provides a mix of services, including:

- Business growth support mechanisms;
- Access to physical and technological assets relevant to early state companies;
- Technical support for product design, fabrication, packaging and testing services;
- Access to STC developed manufacturing processes;
- Collaboration with the regional FLWIB to develop workforce training programs; and
- Resource pairing (e.g. venture capital, industry partners, etc.)

These resources would be available to firms involved with the STC Center, either as physical tenants or as customers utilizing STC's technical infrastructure. STC is utilizing existing, underutilized space for tenant companies that can benefit from being co-located at STC. The facility accommodates office and meeting space for high-technology companies and related parties, a state of the art communications system linked to the Ontario County Fiber Optic ring, and advanced clean room laboratory space to accommodate tenant equipment.

Additionally, STC is undergoing the process of developing its 57-acre site as a "shovel ready" campus for advanced manufacturing companies. This will allow STC the ability to market its site to firms that work in complementary industries to physically locate on the STC campus, further leveraging access to STC's substantial technical infrastructure. A current example is STC's work with Moser Baer Technologies (MBT) to develop the world's first organic light emitting diode (OLED) lighting pilot production line. Once the pilot line has been operating, and manufacturing processes refined, STC will work with MBT to seek to have them locate full manufacturing operations in a new facility on the STC campus.

Ontario County Fiber Optic Ring

Telecommunications is such an integral part of Ontario County's strategic approach it has been likened to the economic impact of other paradigm-shifting infrastructure such as the New York State Thruway and the Erie Canal. The Finger Lakes Regional Fiber Infrastructure Project was developed to identify the means of building a regional open access fiber optic ring to connect education, healthcare, public safety, and government. An outgrowth of this project has been the creation of the Finger Lakes Regional Telecommunications Development Corp. This LDC has successfully accessed the funding necessary to construct the fiber optic ring.

The establishment of the fiber optic ring will help attract new workers to the Region who can utilize the available technology to telecommute to jobs anywhere in the world. Establishing a core of these knowledge workers will also position the County well in the attraction of technology companies looking for an educated workforce. Ontario County continues to view every company as a technology company and the completion of the fiber optic ring will open up new opportunities for companies and help them lower their business costs.

The fiber optic ring will better equip both Ontario County and the G-FL Region to compete in a knowledge-based economy. Those who wish to be competitive in a knowledge-based economy must have the tools necessary to succeed. Maintaining and expanding all types of infrastructure, ranging from traditional roads to venture capital, will position Ontario County to take advantage of the high growth industries of tomorrow.

Ontario County's priority projects are listed in Table 30.

Table 30- Ontario County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
ON-1	Cornell Agriculture and Food Technology Park Finger Lakes Food Innovation Center	Ontario County OED/IDA	\$7,000,000 New York State, EDA	20-40
ON-2	Smart System Technology and Commercialization Center (STC)	Ontario County OED/IDA	\$6,400,000 New York State, Local, Private, EDA (Pending)	200-240
ON-3	Ontario County Alternative Energy Park Infrastructure	Ontario County OED/IDA	\$1,500,000 State, Local, Federal	16-23

5.7 Orleans County

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

Orleans County is home to the first ethanol plant in the Northeast, operated by Western New York Energy LLC. The plant has been in operation since November 2007, creating 50 jobs and investing over \$90 million into the community. The ethanol plant also provides an additional market for local corn farmers.

Orleans County has identified seven target development areas that can utilize existing infrastructure and available office/industrial space. Targeted industries include manufacturing and other large employing sectors as well as new technology companies. The major deterrent to development in the County is the lack of modern building inventory most notably in the 40,000 square foot area.

Area 1 – Medina West End Industrial Complex

The Medina West End Industrial Complex includes 213 acres, encompassing a commercial district dominated by a 93,000 square foot vacant shopping plaza with parking for over 700 vehicles. Medina, the largest population center in the County, provides an immediate pool of employees for locating companies. Water/sewer infrastructure is available, along with rail access and high-speed internet. Orleans County is targeting data centers, food processing/packing companies, back office companies, or Canadian manufacturing subsidiaries to locate to this area.

Area 2 – Medina Business Park and Surrounding Acreage

The Medina Business Park and surrounding acreage provides 516 acres for business location/development. Part of this space includes an over 120 acre business park owned by the County of Orleans IDA. The County has put in place permitting and zoning to allow for fast-track building on the site. Water/sewer, rail access and high speed internet are all available at the site, with data centers, agricultural businesses, ethanol/biofuels production, or manufacturing targeted for the site.

Area 3 - Village of Lyndonville/Town of Yates

Located in a rural area of Orleans County, area 3 provides 58 acres of development opportunity. Several vacant parcels in this area are zoned for industrial development and have public water and sewer. As this area is largely surrounded by agricultural areas, it is well suited for food processing or agribusiness uses, reducing the travel necessary for the raw materials. The area is positioned to take advantage of the agricultural areas surrounding the site, while still being serviced by public utilities, including high-speed internet.

Area 4 - Village of Albion, Albion Industrial Center

The Albion Industrial Center is home to one of Orleans County's most successful economic development projects, JP Morgan/Chase. This area encompasses the Albion Industrial Complex, which contains several building complexes including the 155,000 square foot JP Morgan/Chase

building, a 70,000 square foot warehouse and a 60,000 square feet manufacturing building, which houses three new start-up businesses.

This area located on Route 31, a major arterial in Albion, is adjacent to a rail line and is located only ½ mile from Route 98 affording easy access to the New York State Thruway. The complex has excellent dock capabilities, high ceilings, easy access and extensive parking, making it ideal for warehousing, manufacturing, or back office operations.

Area 5 - Albion Business Park /St. Gobain

The Albion Business Park contains approximately forty acres of undeveloped land owned by the County of Orleans IDA. The remaining thirty-two acres of the sites is owned and operated by St. Gobain, a textile manufacturer. This area is located on Route 31, a major arterial in Albion and is only 2 miles from Route 98 providing easy access to the New York State Thruway. Water, sewer, and high-speed internet are available. Orleans County is targeting the site for health care operations, back office operations, or for corporate offices.

Area 6 - Holley Business Park

The Holley Business Park contains 226 acres and is located in the Village of Holley near the Monroe County line, providing industries close access to Monroe County with a lower cost of doing business. The park is adjacent to a rail line and is located on Route 31, providing easy access to the New York State Thruway. Low cost municipal power is available at the site (\$0.03 KW commodity rate). Orleans County is targeting back office operations, warehouse/distribution, or manufacturing for this site.

Area 7 – Albion NY Route 98

This 169 acre 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. Small start-up businesses are targeted for this site, which provides high-speed internet access and industrial/commercial zoning.

Orleans County has secured funding to develop an Orleans County Industrial Development Strategic Plan that will help identify the economic development assets within the County as well as areas where infrastructure investment needs to be made. The Industrial Development Plan will analyze each of the above targeted areas and help to prioritize future investment decisions.

Business Assistance

The Orleans Economic Development Agency/Industrial Development Agency (OEDA/IDA) continues to work with many other government agencies to assemble a wide range of incentives and benefits to assist businesses in retention and creation of jobs. Since Orleans County falls between two major population areas (Rochester and Buffalo), OEDA/IDA draws 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 either the Finger Lakes Region or in Western New York.

Orleans County business assistance programs include, but are not limited to, a revolving loan fund, industrial revenue bond financing, training, payments in lieu of property taxes, and sales tax abatement on equipment purchases. Additionally, Orleans County provides Microenterprise assistance to entrepreneurs and small businesses. A rent subsidy program is also offered by the IDA and has helped to attract businesses into Orleans County villages contributing to Main Street revitalization efforts.

Orleans County's priority projects are listed in Table 31.

Table 31 - Orleans County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
OR-1	Albion Business Park Development	County of Orleans IDA	\$500,000 EDA, NYS, Orleans County	200
OR-2	Orleans Fiber Optic Pipe	County of Orleans IDA	\$500,000 EDA, Orleans County, Private	Indirect
OR-3	Keppler Site Shovel Ready	County of Orleans IDA	\$1,025,000 EDA, Orleans County, Private	200-300
OR-4	Medina Park Spec Building	County of Orleans IDA	\$3,000,000 EDA, Orleans County, Private	50
OR-5	Medina Park Shovel Ready	County of Orleans IDA	\$690,000 EDA, Orleans County, Private	Indirect
OR-6	Holley Park-Electrical Supply	County of Orleans IDA	\$6,625,000 EDA, Orleans County, Private	Indirect
OR-7	Rail Infrastructure Expansion/Development	County of Orleans IDA	\$2.5 Million Orleans County, State, Local, Federal	Indirect

5.8 Seneca County

Seneca Army Depot

A focal point of the Seneca County IDA's efforts over the past two decades has been the reuse of the former Seneca Army Depot. The Five Points Correctional Facility at the south end of the Depot has created over 830 jobs (640 directly at the prison and an additional 190 indirectly). Additional investments at the south end of the Depot have been made by The Advantage Group, Seneca Bio-Energy and Top Quality Hay Processing. Development at the north end of the Depot includes a Hillside residential-educational facility for youth in crisis, which has created 385 jobs. Fiber optic technology, which exists throughout Seneca County, is provided on the northern end of the depot by Finger Lakes Technology Group. Some 180 units of military housing have been sold by the Seneca County IDA and are being managed by the private sector along with additional upscale housing units that have been developed along Seneca Lake.

New York State Police training facilities and a new Seneca County Fire Training Tower have been developed at the southwestern end of the Depot with grants from the State of New York and EDA. A 124 bed county correctional facility has been completed in an area adjacent to the PID/Warehouse area. Portions of the warehousing facilities are being leased from the IDA to Seneca Depot LLC, and are being subleased for storage and refurbishing of restaurant equipment. The IDA has taken title to the entire area, except for the acreage under environmental remediation, and will convey it to Seneca Depot LLC and several other entities.

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

Environmental remediation is continuing and remains to be completed on approximately 900 acres (of 10,500) of the Depot. There have been proposals to use part of this area for conservation and recreation, as well as other potential economic uses once the area is deemed cleared of any such ordnance. The Army is responsible for maintenance of the security fences and management of wildlife at the base, including the herd of white deer, until environmental remediation has been completed, now estimated to be the year 2015.

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

The IDA has completed a study of the former 7,000 foot Seneca Army Airfield. The study findings indicate that a significant level of capital expenditures would be required to open and operate the Depot airfield as a County airport and its use as a public airport is not recommended.

The study also found that a part-time or full-time security training operation by a government, military, or commercial organization would be the best potential for the facility. To this end, the IDA is in discussions with a number of interested training organizations including Fort Drum, which is licensed to, but has yet to utilize the Depot, and the Navy Warfare Office.

Other Seneca County Development Activities

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

The IDA is working with involved municipalities to extend additional infrastructure in the Route 318/414 development corridor and to improve the connecting infrastructure to adequately serve new growth. Additionally, the IDA is working closely with the owners of Seneca Meadows Landfill on Route 414 in the development of a renewable energy industrial park to capture the methane being produced at the landfill for low cost energy opportunities in the future. Currently 18 MW are being delivered to the grid by the Seneca Energy Company, with an application in process to increase this to 24 MW. Construction is also underway on a facility housing a number of electric generators that will be fueled by methane.

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

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

Construction of the Sampson veteran's cemetery is underway. Once completed, the cemetery operation will result in approximately 15,000 annual visitors to Seneca County. Projections indicate that these visitors will spend approximately \$600,000 annually at local retail

establishments, restaurants, tourist attractions and lodging facilities. The project will bring new life to an important historical site within Seneca County, which has been dormant and in disrepair for the past forty years. The project will remove over 40,000 square feet of dilapidated buildings, restore pride in this important site, and provide a place of honor and final rest for those veterans who have served our country. The veteran's cemetery will be a place of great civic pride for Seneca County and for the Region.

Agriculture and Tourism

Agriculture and associated agribusiness continue to expand, primarily in the southern portion of Seneca County and agribusiness continues to be a focus of the IDA. Top Quality Hay Processors began operations in 2009 utilizing warehouse space at the Seneca Army Depot. Top Quality Hay Processors contracts with local farmers to take hay from the field and dry it with their equipment indoors, reducing drying time and improving the quality of the hay for sale.

The tourism industry within the County is noted for the increasing number of wineries, restaurants and bed and breakfasts located along the shores of Seneca and Cayuga Lakes. Historical and cultural tourism sites are also prevalent and include the National Women's Hall of Fame and the Montezuma National Wildlife Refuge. The Seneca County Chamber of Commerce serves as the local tourism promotion agency marketing the area's attractions and is continuously working to enhance the local tourism industry.

Small Business

Small business and startups account for a significant portion of the growth in the county's overall economy. To assist in the development of these companies the Seneca County Department of Planning & Community Development offers several loan funds to qualified small business and micro-enterprises. Business development services are offered to address the opportunities and needs of Seneca County firms.

Airport and Other Facilities

Infrastructure investment at the Finger Lakes Regional Airport, which is owned and operated by Seneca County, continues to utilize federal, state and county funds. The investment will help increase the use of the airport which already accommodates corporate aircraft by business travelers and tourists. The airport runway has recently been expanded to 4,600 feet and a number of other improvements are underway including repaving the runway.

Master Planning

Seneca County has initiated an update to the County's Comprehensive Plan. While the current plan has proved beneficial, it is dated and needs considerable work to ensure that the County is taking the most appropriate actions and strategies to capitalize on its economic development strengths and create new growth opportunities. The planning process will involve considerable input from community leaders and the citizenry at large.

Seneca County priority projects are listed in Table 32.

Table 32 - Seneca County Priorities

Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
S-1	Electrical Upgrade – Seneca Army Depot	Seneca County IDA	\$8.0 Million EDA	Up to 5,000 (including S-2 & S-3)
S-2	Infrastructure Improvements at the Seneca Army Depot – water, sewer, roads, rail and drainage	Seneca County IDA	\$12 Million EDA, NYS	Up to 5,000 (including S-1 & S-3)
S-3	Demolition of derelict and unneeded buildings and facilities at the Seneca Army Depot	Seneca County IDA	\$5.5 Million EDA, NYS	Up to 5,000 (including S-1 & S-2)
S-4	Route 318 Sewer Expansion/Upgrades to Connections	Seneca County	\$4.5 Million EDA, NYS, Local	Up to 2,000
S-5	Seneca County Master Plan	Seneca County	\$140,000 EDA, Seneca County	Indirect
S-6	Veterans Memorial Cemetery	Seneca County	\$3,170,000 County, State, Federal	9
S-7	Small Business Assistance	Seneca County, Seneca Chamber of Commerce	\$1,000,000 EDA, Seneca County	Indirect

5.9 Wayne County

The Wayne County economy includes a large number of small to medium sized manufacturing firms in a variety of operations. Machine shops, packaging firms, label production and related service operations as well as food production facilities and a host of other types of manufacturing businesses characterize the largest portion of Wayne County's economic base.

Agriculture and the related agribusiness sector form another key component of economic activity within the County. A number of industries are involved in bio technology, particularly with regards to animal vaccines, foods and training. It is anticipated that these industries, along with alternative energy industries, will continue to show strong growth within the County over the next five years.

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. A brownfield cleanup program has been established with initial projects in progress in the Town of Sodus and in the Village of Macedon. This program will help bring properties back to the tax-rolls and

expand the amount of developable land in the county while alleviating pressure to develop open space and agricultural properties.

Recognizing that predictable and affordable utility costs are key components of a successful economic development strategy, Wayne County IDA has worked to design the Wayne Industrial Sustainability Park (WISP). Modeled after a comprehensive sustainable energy generation system implemented by a local industry, the WISP will offer cogeneration and distribution of thermal and wind generated power to industries as a way to attract and retain jobs. An energy sustainability plan is currently being developed with local industrial parks to help position the County competitively with regards to energy costs. Wayne County has also contracted with experts in the fields of energy and energy distribution, positioning itself to develop an industrial park supported by sustainable, renewable, and affordable energy.

A sustainable energy industrial park would position Wayne County as a leader in the field of innovative economic development solutions. This project will serve as an example for others to follow, perhaps leading to a renaissance of job opportunities in this Region. Wayne County will clearly demonstrate that respect for the environment and aggressive economic development can coexist. The cost for the establishment of a sustainable industrial park in the county is estimated to be \$7.1 million, which includes a bio digester with thermal and electric distribution throughout 40+ acres, a 1.5 MW wind turbine and the road, water and sewer infrastructure necessary for industrial use. Development will occur over the next several years with pods serviced by a variety of alternative energy resources—bio-diesel, wind power, glycerin generators, geo-thermal—located at industrial parks and sites throughout the County.

A continuing top infrastructure priority of the Wayne County IDA is the development of an access road to industrial land north of Route 104 and the Ontario Midland Railroad between Lincoln Road and Dean Parkway in the Town of Ontario. Currently, the Beh industrial area is serviced on the incomplete Dean Parkway, an access road intersecting Route 104. Plans have been developed to extend Lincoln Road across the railroad tracks connecting it with a western extension of Dean Parkway to form a complete access road through the industrial area.

The Town of Ontario, Wayne County and the WISP have constructed the first phase-construction of the Timothy Lane Phase I, but are seeking funding for the completion of the infrastructure project. With both the optics cluster at Beh Park and the WISP located in the area noted above, the road extension and rail crossing will leverage more available industrial and commercial land without harming the residential quality of life. The Town of Ontario has recently completed a Generic Environment Impact Statement in order to prepare the area for not only the expansion of the infrastructure but to insure the ability to move forward quickly as the expansion begins to develop. During 2011 another wind turbine is proposed.

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

Training for a stable, skilled workforce is a high priority for new and expanding industrial development. The Wayne/Finger Lakes BOCES and Finger Lakes Community College (FLCC) continue to offer specialized training programs. Monroe Community College also has a satellite campus at the Wayne Central School in the Town of Ontario. FLCC has established the Wayne County Campus Center in the Silver Hills Technology Park, and began classes in September 2006. The location of the Campus Center's in the Silver Hills Technology Park will allow programs to utilize the Build-Now New York site, being developed, in part, as a pod of the Wayne Industrial Sustainability Park, for the study, use and development of alternative energy resources for industry. During 2010 a new biology laboratory was completed at the FLCC Campus Center.

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 are underway involving 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.

Important economic development and environmental opportunities for Wayne County also include water system expansions and upgrades to the systems in the northeast quadrant of the county, specifically to restore and develop adequate fire pressures as well as acceptable, reliable potable water to the Village of Wolcott, the area immediately surrounding the Village in the Town of Wolcott and the Town of Butler. Important to both residents and businesses, this water upgrade is crucial to the retention and expansion of the northeastern Wayne County industrial base. The IDA worked with the Wayne County Water and Sewer Authority to complete a needs and availability assessment of water in the southeast quadrant during 2010.

Other infrastructure improvements include a road extension for the Clyde Industrial Park; scattered site development of sustainable energy resources for industrial development; improvements to existing east-west transportation routes, including, but not limited to, Route 31 and Route 441, and possible implementation of past plans to either upgrade/expand or create another east-west route, addressing traffic constraint issues between the Webster/Penfield/Perinton areas and the western sections of Wayne County.

Wayne County is home to the Williamson-Sodus Airport in the Town of Sodus. With the ease of private flying in the industry sector, there is support for expanding the airport to serve additional flights as well as larger private planes. Discussions are ongoing regarding the financing for engineering, acquisition of land and construction that will be needed to move this project forward.

One of the infrastructure additions prioritized, repeatedly, for transportation access for industry and tourism, is the establishment of a Lyons Amtrak Passenger Station. Grants totaling \$1,020,000 have been secured for this project by Senator Michael Nozzolio, but a funding gap remains. This project has the potential of connecting tourists arriving via New York City or

Toronto with rail access to Finger Lakes wineries, the Erie Canal and Lake Ontario through the Village of Lyons.

The improvement of infrastructure in the Lyons Industrial Park on Route 14 to coincide with the two interfacing rail services and a potential commercial canal port bring critical mass and opportunities to this rural canal-era community. The feasibility study for the port and multimodal access center has been completed; an economic impact study is now underway. This area will provide the ability to connect freight across the Great Lakes with businesses and communities deep in the heart of the Finger Lakes via the north south secondary rail.

The strategic plan for economic development within the County, adopted in late 2006, is under review, revision and reinvestment. The Wayne County IDA is currently in the process of developing a plan for sustainability, based on focus areas that include alternative energy and conservation; business and economic development; and water management.

One strategic plan priority is for Wayne County Industrial Parks to be readied for smooth, swift processing of applications and permits. Engineering costs to achieve this will be considerable and as such, information gathering and potential physical upgrades will be done over the course of several years for the existing eleven parks, and an additional three to five sites within the County. The WISP model and the sustainability plan will be referenced as upgrades to, and plans for other Industrial Parks are made.

The Wayne County IDA continues to operate a business retention and expansion program and regularly conducts site visits and contacts local companies to listen to and address any concerns they may have. Information obtained from these visits and meetings is maintained in a database allowing for improved regional efficiency in addressing the concerns of local businesses.

Wayne County is in the process of completing a fibre optic inventory and development plan. Establishing fiber optic will help local businesses compete globally and allow for improved efficiency with regards to communication and data transfer. Wayne County anticipates the study to be finalized by early July 2011, which will help shape future telecommunications development decisions.

Wayne County priority projects are listed in Table 33.

Table 33 - Wayne County Priorities

	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
WA-1	Wayne Industrial Sustainability Park and pod infrastructure improvements—Ontario pod/Northeast Quadrant pod/Silver Hill Technology Pod	Wayne County IDA	\$7.1 Million Federal, State, Local, IDA, Private	15-300
WA-2	Water Improvements Village of Wolcott/Electromark	Wayne County	\$3.7 Million Federal, State, Private	Retain 130; Create up to 300
WA-3	Water/sewer Improvements Town of Wolcott/Village of Red Creek	Wayne County	TBD	Indirect
WA-4	Industrial Road-Town of Ontario in its entirety, Beh to Lincoln (see WA-1)	Wayne County IDA; Town of Ontario	\$5 Million Local, State, Federal	25-300
WA-5	Lyons Industrial Park Development (highway, rail, possible water access) Multi modal transportation and logistics site	Wayne County IDA	\$7-\$18 million Town, Village, Economic Dev. Corp.; Lyons IDC; Federal, State, Private	15-300 (depending on phase)
WA-6	Improve Downtowns	TBD	\$240,000 State, County	5-100
WA-7	Fiber Optic Infrastructure (last mile)	Wayne County	\$2 Million Federal, State, Local	30-50
WA-8	Amtrak Station- Lyons	Wayne County	\$13 Million State, Local, County, Federal, Private	Indirect

5.10 Wyoming County

The economic vitality of the County is closely tied to state and national business conditions that the county has little control over and this has been evident during the current economic recession. As a result, an important emphasis is placed on having an aggressive and effective economic and business development effort within Wyoming County.

The Wyoming County Board of Supervisors has recognized the importance of a strong county economy by actively supporting economic development efforts within the county including: continued contraction with the Wyoming County Business Council (WCBC) to provide business attraction and retention activities; supporting the Wyoming County Industrial Development Agency (WCIDA) and WCBC in the areas of real estate and infrastructure development, and by continuing to seek grant awards for economic development through the New York State Office for Small Cities.

Dairy is the biggest industry in Wyoming County and supporting this economic sector is a top priority. In 2008 there were 770 farms, consisting of 215,800 acres, whose crops and livestock cash receipts totaled \$225,907,000, the second highest cash receipts total in New York State. Currently, however, milk prices are once again low, adversely impacting the dairy industry within Wyoming County. The dairy industry may also be impacted by the potential competition from ethanol producers for grain/vegetables/corn possibly leading to higher prices for these products.

The challenge for Wyoming County and other rural counties is that the service and technology based industries that are driving the current economy saw nearly all of the growth occur in urban/suburban areas. This left most rural areas out of the expanding “new economy.” Rural areas generally do not have a large enough professional workforce to attract or develop these “new economy” businesses, except in areas where there are colleges and universities or other amenities to attract workers.

The Wyoming County Business Council and the WCIDA work together with the Wyoming County Department of Planning and Development to help support business retention and small business development through its Microenterprise Revolving Loan Fund focusing on downtown/community revitalization. The process includes regular on-site visits and/or communications with all manufacturers, major employers and companies with growth potential.

Retaining existing firms and assisting them is more important and cost effective than the recruitment of new companies. Approximately 70-80% of all business growth will come from the expansion/establishing a new subsidiary or modernization of existing firms that already employ local workers and pay local taxes. Supporting local entrepreneurs and private investment that will help 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. The revitalization of downtown commercial district corridors also continues to 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. Although Hillcrest has entered into a mutually beneficial relationship with a major roofing manufacturer, inconvenient rail access causes the product to be loaded adjacent to a residential area located a half mile from the plant. The Wyoming County IDA is continuing to work with state and federal agencies to provide funding to create a rail spur off the existing rail line into the site to facilitate more efficient and effective transport of materials. Additional construction of a warehouse/storage dock platform is targeted to allow more companies to utilize the rail line as diesel gas prices continue to climb. The platform would also be of interest to another similar sandblasting company, which has expressed interest in the site and could potentially create upwards of sixty new jobs. The creation of a new rail spur would significantly increase the attractiveness and usefulness of the site and the WCIDA continues to work on closing a \$170,000 funding gap that still exists for the rail improvement.

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

Infrastructure construction is almost completed at the Arcade Business Park as water and wastewater have already been extended to the site which is now privately owned. A lack of infrastructure such as municipal water/sewer, access to an interstate highway and inadequate telecommunication services are still major barriers to future development. Also hindering economic development in Wyoming County is the lack of shovel ready development sites and buildings.

To this end Wyoming County has completed economic development projects to upgrade infrastructure and the roadway at the Arcade Business Park and to prepare the Westinghouse site for anticipated improvements.

Wyoming County continues to be the leader in New York State regarding the number of acres used in wind farm turbine energy projects. As a result, alternative energy initiatives such as bioenergy manure digesters and the manufacturing and assembly of wind turbine components has become a County priority. Wyoming County continues to pursue brownfield redevelopment through an approved Brownfield Opportunity Area Grant for the A & A Metals site in the Village of Perry, as well as working with the NYSDEC to market the former Robeson Building in the Town of Castile. The attraction of a name brand hotel chain remains a County priority, with locations targeted in Arcade, Attica or Warsaw. Finally, the County recognizes the need to expand and grow agribusinesses in Wyoming County and has received and earmarked federal funds to initiate a Farm Diversification Value Added Pilot Demonstration Program to its Microenterprise portfolio. Large dairy farms with the County have also made investments to help increase efficiency, helping these farms remain competitive.

Wyoming County priority projects are listed in Table 34.

Table 34 - Wyoming County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
WY-1	Wyoming County Rail Initiative	Wyoming County IDA	\$1.5 Million USEPA, NYSDEC, Local	25
WY-2	Alternative Energy Initiatives- Wind-tamer turbines/bioenergy manure digester processing	Wyoming County Business Center	\$4.5 Million NYSERDA, USDA	5
WY-3	Redevelopment of A&A Facility in Perry	Wyoming County Business Center	\$2 million NYSDEC, USDA, EDA, Local	10-25
WY-4	Hotel Attraction (new build or renovation for brand-name hotel)	Wyoming County Planning & Development/Wyoming County Business Center	\$1.0 Million USDA, GOSC, Local	50
WY-5	North Main Street Sewer Extension-Warsaw	Village of Warsaw	\$850,000 EFC, USDA, Local	25-50 + indirect
WY-6	Perry Business and Technology Park	Wyoming County Business Center	\$2.2 Million EDA, USDA, Local	100
WY-7	Agricultural Diversification Plan	Wyoming County IDA	\$50,000 County, Local, State, EDA	4-10
WY-8	Village of Silver Spring Business Park	Wyoming County IDA	\$3 Million County, EDA, Local, State	50

5.11 Yates County

Yates County has developed a diverse economic base, with manufacturing, agriculture and tourism the three main industries. The Tourism and Agriculture sectors continue to see rapid expansion. High-tech and the traditional local businesses continue to grow and expand, as does the tourism industry and agriculture. Employment opportunities in the public sector, such as education and local government also continue to be an important component of the local economy.

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

an expanding general aviation airport, extensions of water and sewer infrastructure to new areas of the county, and an abundance of fresh water. Recent 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.

Efforts have continued within the last year to support retail, tourism-related businesses and other commercial properties. A survey was conducted to determine what types of businesses residents/visitors desired in the downtown, helping to attract a clothing store, restaurant, and café. Additional Main Street revitalization efforts continue within the Villages of Penn Yan and Dundee regarding façade improvements and business attraction.

The appeal of the Finger Lakes Region continues to drive tourism growth in Yates County. Tourism has developed as the leading economic engine for the county, bringing visitors and spending to the area. The opening of the Best Western Vineyard Inn & Suites in downtown Penn Yan added much needed lodging and with occupancy rates well above predicted levels have started a 12 room expansion project.

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 over \$83 million annually. 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 Esperanza Mansion, and numerous other inns and bed & breakfasts there are now 369 rooms in Yates County for overnight accommodations.

The County remains the second largest producer of grapes in New York State and the largest wine grape growing county outside of California and has seen resurgence in other areas of agriculture as well. The dairy industry within Yates County has been reinvigorated, and value-added agricultural products, as well as crops for the organic market, have seen rapid growth in the County. In 2008, agricultural cash receipts for both crops and livestock total over \$94 Million for the County. The Finger Lakes Museum project recently announced that it will be locating in Yates County adjacent to the Keuka Lake State Park, although funds still need to be raised to make the project a reality. Additionally, many visitors are attracted to the crafts and agricultural goods produced in the County, especially by the growing Mennonite population.

The County's economic development strategy continues 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.

A majority of the major private sector employers in Yates County are not locally owned, which poses a potential threat to the County's economy. In response to this threat, the Yates County Industrial Development Agency, now doing business as the Finger Lakes Economic Development Center, has implemented new development programs focused on expanding

agricultural businesses and entrepreneurship in general within Yates County. The programs aim at providing needed capital to the two areas of focus. Through a \$750,000 grant from New York State and other program monies, the Finger Lakes EDC has created a \$1,000,000 + funding source for agricultural and entrepreneur businesses in Yates County. Early results have been extremely positive with 19 new businesses having either started up or located to Yates County in the past 12 months. Another recent major accomplishment was being selected by the Finger Lakes Cultural and History Museum as the location for their planned \$40-60 million dollar museum.

Infrastructure development and the development of space remains a major goal of the FLEDC, since most of the space within the industrial parks has been filled. Other high priority initiatives include the attraction of a highly educated workforce into the County. To this end, strategies include efforts to increase wages, provide new housing options and to increase the quality of life. Entrepreneurship and innovation are also priorities for the County and efforts are underway to develop an agriculture-incubation facility to spur agricultural innovation. Discussions regarding this facility continue between Yates County and regional partners including High Tech Rochester and the Cornell Agriculture and Technology Park.

Yates County's priority projects are shown in Table 35.

Table 35 - Yates County Priorities				
Priority Number	Proposed Project	Lead Agency on project	Total Project Cost and Funding Sources	# of jobs projected to be created
Y-1	Waterfront Redevelopment of Former Penn Yan Marine Facility	Finger Lakes EDC, Yates County, Penn Yan, Milo	\$20,000,000 EPA, DEC, County, Local	Up to 500
Y-2	Installation of Fiber Optic Cable into and throughout Yates County	Yates County Government & Finger Lakes EDC	\$2,200,000 Stimulus Funds, County	100+
Y-3	Dundee Waste Water Treatment Plant Upgrades	Finger Lakes EDC, Village of Dundee	\$2,000,000 NYS EFC CWSRF, NYS Small Cities, EDA	25+
Y-4	Route 14 Eastern Corridor Water District	Finger Lakes EDC, Yates County, Town of Torrey, Town of Milo, and Penn Yan Village	\$15,700,000 EDA, USDA, EFC, NYS Small Cities	10+
Y-5	Keuka Park Water District Water Main Replacement	Town of Jerusalem	\$1,875,000 Stimulus, NYS, Local	5+
Y-6	Keuka Street Water and Sewer Replacements	Penn Yan Village	\$1,700,000 Stimulus, NYS, Local	5+
Y-7	Elmwood Avenue Railroad Siding	Penn Yan Village	\$1,150,000 Stimulus, NYSDOT, Local	40+
Y-8	Branchport/West Bluff Drive Sewer District , Jerusalem	Finger Lakes EDC	\$7,175,000 NYS EFC CWSRF	40+
Y-9	Torrey Water District #1 , Torrey	Finger Lakes EDC	\$4,000,000 NYS EFC DWSRF, USDA, EDA, Local	10+

Chapter 6 – 2010-2011 Goals, Objectives, Strategies and Measures

6.1 Stakeholder Input Sessions

Three stakeholder input sessions were held within the G-FL Region on June 28, 29 and 30, 2010. The purpose of the stakeholder input sessions was to define a regional vision and set corresponding goals, strategies, and measures. The first meeting was held in Geneva, 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, including county planners, IDA directors, workforce investment boards, business improvement districts, chambers of commerce, elected officials, CEDS Strategy Committee members, and other economic development professionals. Many of these groups were in attendance at the input sessions, including representatives from both the public and private sectors. While valuable input into the development of the CEDS came from these sessions, a sense of cooperation between participants was also forged to help ensure collaboration on economic development projects, initiatives, and programs. A list of stakeholder input session attendees and a copy of the presentation given at the three meetings can be found in Appendices 7 and 8.

6.2 Goals, Objectives, Strategies and Measures

The following goals, strategies, and measures were developed in 2010 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 the 2010 stakeholder input sessions can be found in Appendix 9.

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 and private sector partners to secure and leverage funding for the retention and expansion of existing industries	<ul style="list-style-type: none"> Continue to foster relationships with commercial banks Continue to operate a regional revolving loan fund Work with local organizations and entities on packaging public and private financing options 	<ul style="list-style-type: none"> Amount of G/FLRPC regional revolving loan 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 or retained by businesses receiving funding
To continue to work with partners on maintaining, developing and marketing economic development 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 	<ul style="list-style-type: none"> Number and diversity of new partnerships and collaborations Number of public and private partners G/FLRPC has in its programs and initiatives

	<ul style="list-style-type: none"> • Continue to seek out new partners for G/FLRPC programs and initiatives • Work with and support state, regional, county, and local programs or initiatives • Encourage companies with a strong presence in the Region to relocate their headquarters to the Region as well 	<ul style="list-style-type: none"> • Number of jobs created or retained
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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 economic development partners with projects that advance regional clusters • Provide assistance to regional organizations regarding technology led clusters • Continue partnership with the Cornell Agriculture & Food Technology Park and other organizations to help further the food and beverage cluster • Pursue funding opportunities to expand alternative energy and other cluster based projects in the district 	<ul style="list-style-type: none"> • Amount of funding secured and leveraged • Amount of private investment coming into the Region • Number of professional support inquiries regarding cluster related businesses
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 and maintain data to support and enhance local development activities • Continue to provide technical assistance to public and private sector partners within the district • Assist counties and municipalities in the development of local economic development plans • Support regional efforts to attract foreign investment to the Region 	<ul style="list-style-type: none"> • Number of professional support inquiries • Number of completed economic development plans • Number of jobs created or retained

To improve infrastructure in the Region to further support new firms and industries	<ul style="list-style-type: none"> • Support the Genesee Transportation Council's (GTC) Goods Movement program and development of the Regional Goods Movement Strategy • Assist in the development of the Mohawk-Erie Multimodal Transportation Corridor Study • Pursue the development of a regional telecommunications inventory and assessment 	<ul style="list-style-type: none"> • Support provided to GTC programs • Participation on Project Advisory Committees and Project Steering Committees
To continue to support regional workforce training and workforce development efforts	<ul style="list-style-type: none"> • Further connections between Workforce Investment Boards, other regional workforce development organizations and EDA programs • Assist in linking Workforce Investment Boards with economic development organizations and the private sector 	<ul style="list-style-type: none"> • Number of individuals trained and referred through Workforce Investment Boards and other workforce partners
To improve the economic development and business climate within New York State and the Finger Lakes Region	<ul style="list-style-type: none"> • Assist regional economic development organizations with marketing of the economic development strengths of the Region • Work with local, regional, state and federal leadership to help shape future economic development policy 	<ul style="list-style-type: none"> • Creation of marketing materials • Identification of key economic development policy makers in New York State

Goal III – 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"> • Assist regional economic development partners with securing and leveraging funding for the alternative fuel sector 	<ul style="list-style-type: none"> • Amount of funding secured and leveraged • Number of jobs created or retained • Number of professional support inquiries
To continue to educate and train communities 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 • Number of attendees at Local Government Workshops

To continue to work with economic development partners to establish, maintain, and market programs and initiatives targeted to agriculture and agri-business	<ul style="list-style-type: none"> • Pursue opportunities to educate leadership on the economic impacts of agriculture within the Region • Continue partnerships with regional food and beverage cluster organizations • Assist regional efforts in the development of a sustainable food shed. 	<ul style="list-style-type: none"> • Number of professional support inquiries • Identification of regional agricultural economic data • Participation in Regional Food Shed Working Group
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Goal IV – Promote Entrepreneurship and Innovation and Encourage Small Business Development		
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 regional organizations that promote entrepreneurship and small business 	<ul style="list-style-type: none"> • Number of participant referrals given to The Entrepreneur's Network • Amount of private sector investment • Number of professional support inquiries
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 to provide small businesses with gap financing • Support RIT-CIMS in the assistance they provide to regional industries in developing and improving products • Partner with regional organizations to assist entrepreneurs in acquiring venture capital • Continue to assist regional partners with pursuing grant opportunities for entrepreneurship and small business development • Support regional innovation and entrepreneurship initiatives 	<ul style="list-style-type: none"> • Number of inquiries and loans closed from the revolving loan fund • Amount of private sector investment • Number of grant opportunities identified
To continue to partner with and support small business development and entrepreneurship organizations	<ul style="list-style-type: none"> • Support institutions, programs and initiatives related to small business development • Assist in obtaining funding for rural entrepreneurship projects 	<ul style="list-style-type: none"> • Number of professional support inquiries • Identification of regional entrepreneurship projects • Identification of regional rural entrepreneurship partners

	<ul style="list-style-type: none"> Assist in building support amongst regional partners for collaboration on rural entrepreneurship projects 	
To increase the number and success of small businesses along main streets and at community centers	<ul style="list-style-type: none"> Continue to support regional small business assistance programs and organizations Assist in linking developers with federal and state preservation and rehabilitation programs to encourage Main Street redevelopment Support village Main Street and historic preservation efforts within the Region 	<ul style="list-style-type: none"> Amount and type of regional investments made Amount of private sector investment Number of jobs created and retained Identification of state and federal Main Street development programs

Goal V – Assist in Improving the Skills of the District’s Workforce

Objective	Strategy	Measure
To support the Workforce Investment Boards and other workforce organizations with training 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 and other regional workforce organizations 	<ul style="list-style-type: none"> Number of professional support inquiries Number of jobs created and retained Number of workers trained
To assist in linking educational partners with economic development groups and businesses	<ul style="list-style-type: none"> Support improvement of educational curriculum at area colleges, universities and high schools to address needs of the business community 	<ul style="list-style-type: none"> Identification of key regional educational and economic development partners

Goal VI – Assist in Improving the Infrastructure of the District

Objective	Strategy	Measure
To improve transportation networks in the Region	<ul style="list-style-type: none"> Continue to partner with the regional Metropolitan Planning Organization, Genesee Transportation Council, on planning and transportation issues that impact the G-FL Region Continue to produce the Annual Land Use Monitoring Report 	<ul style="list-style-type: none"> Attendance at GTC meetings and sponsored events The completion of the Annual Land Use Monitoring Report
To improve telecommunications in the Region	<ul style="list-style-type: none"> Pursue development of a telecommunications infrastructure regional development plan Assist in the development of county telecommunications inventories and assessments 	<ul style="list-style-type: none"> Identification of regional county telecommunications inventory and assessment needs Telecommunications Infrastructure Regional Development Plan

	<ul style="list-style-type: none"> Pursue funding opportunities for telecommunications infrastructure 	<ul style="list-style-type: none"> Identification of funding sources for telecommunications infrastructure investments
To support the establishment of shovel-ready sites within the Region	<ul style="list-style-type: none"> Assist economic development partners in identifying targeted expansion areas in need of infrastructure Assist economic development partners in identifying and pursuing funding opportunities for water and sewer, utilities, telecommunications and other needed infrastructure improvements 	<ul style="list-style-type: none"> Identification of priority sites in need of infrastructure improvements Identification of funding sources for regional infrastructure investment
To improve the electrical grid in the Region	<ul style="list-style-type: none"> Research opportunities for implementation and funding of smart grid technology within the Region 	<ul style="list-style-type: none"> Identification of smart grid technology opportunities Identification of funding sources for smart grid electrical development

Goal VII – Enhance Tourism and Marketing Efforts within the District		
Objective	Strategy	Measure
To further develop the Finger Lakes Region as a destination location	<ul style="list-style-type: none"> Continue to 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 regional tourism investment Number of professional support inquiries
To further develop and promote the recreational attributes of the Region	<ul style="list-style-type: none"> Continue to act as a resource regarding regional blueways trails Support the efforts of local and regional tourism agencies to promote the recreational and natural resources and attractions of the Region Pursue opportunities to educate leadership on the economic impacts of tourism within the Region Support the efforts of regional partners in identifying and securing funding for tourism promotion 	<ul style="list-style-type: none"> Number of professional support inquiries related to blueways Support provided to local and regional tourism agencies through provision of data, information, or services Identification and distribution of tourism economic data Identification of grant opportunities for regional tourism development

To utilize the Erie Canal as a tourism and economic development opportunity	<ul style="list-style-type: none"> Continue to support the work of the Western Erie Canal Alliance, New York State Canal Corporation, Erie Canalway Heritage Corridor, and other tourism and development groups 	<ul style="list-style-type: none"> Identification of priority projects along the Erie Canal Provision of planning services to municipalities along the Erie Canal Number of professional support inquiries
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Goal VIII – Support the Development of Targeted Regional Clusters; including Advanced Manufacturing and Alternative Energy within the District

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 Assist in linking local resources (e.g. RIT CIMS Center) with manufacturing companies to improve regional advanced manufacturing cluster 	<ul style="list-style-type: none"> Number of professional support inquiries Number of jobs created and retained
To bolster the competitiveness of the Region's clusters	<ul style="list-style-type: none"> Continue to support economic development partners with projects that advance regional clusters Work with regional stakeholders in identifying and developing regional economic development clusters and emerging technologies Continue partnership with the Cornell Agriculture & Food Technology Park and other organizations to help further the food and beverage cluster 	<ul style="list-style-type: none"> Identification of regional industry clusters and emerging clusters Identification of funding opportunities for regional cluster development Number of professional support inquiries regarding cluster related businesses
To improve sustainability through improving opportunities for alternative energy	<ul style="list-style-type: none"> Pursue funding opportunities to expand alternative energy and other cluster based projects in the district 	<ul style="list-style-type: none"> Number of professional support inquiries regarding alternative energy Identification of alternative energy funding opportunities

Goal IX – Strengthen Regional Coordination and Collaboration

Objective	Strategy	Measure
To collaborate as a region on 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 	<ul style="list-style-type: none"> Number of professional support inquiries Number and diversity of new and existing partnerships in which G/FLRPC is involved

	<ul style="list-style-type: none"> • Continue to seek out new partners for G/FLRPC programs and initiatives • Work with and support state, regional, county, or local economic development programs or initiatives 	<ul style="list-style-type: none"> • Number of public and private partners G/FLRPC has in its programs and initiatives
To promote information sharing in the Region	<ul style="list-style-type: none"> • Continue to use the EDAC/RDC meetings as a medium for information sharing • Continue to hold regional roundtables 	<ul style="list-style-type: none"> • Number of regional roundtables and other information sharing events held • Number of attendees at roundtables and other events

Goal X – Educate Leadership and the Community regarding Economic Development and Sustainable Development Practices		
Objective	Strategy	Measure
To continue to educate and train communities on changing trends in economic development	<ul style="list-style-type: none"> • Conduct sessions at Local Government Workshops on critical economic development and planning issues • Continue to update communities and leadership regarding regional economic development issues through EDAC, PCC, and other meetings • Educate Region on the Marcellus Shale and its potential impacts on economic development in the Region 	<ul style="list-style-type: none"> • Number of sessions and attendees at the Local Government Workshops on economic development • Number of economic development community presentations given • Identification of Marcellus Shale key stake holders
To resolve issues of development related to brownfield sites	<ul style="list-style-type: none"> • Administer or assist in Brownfield Opportunity Area programs within the Region 	<ul style="list-style-type: none"> • Use of the NYS Brownfield Opportunity Areas program • Number of communities assisted with brownfield development projects
To encourage efficient land use and development patterns	<ul style="list-style-type: none"> • Continue to provide education, training and assistance to communities related to comprehensive plans and land-use regulation control 	<ul style="list-style-type: none"> • Number of developed and/or revised comprehensive plans • Number of communities assisted with implementation of comprehensive plans • Number of attendees at Spring and Fall Local Government Workshops
To encourage efficient local governments	<ul style="list-style-type: none"> • Assist local governments in the development of studies analyzing the impacts of consolidation and/or sharing of services 	<ul style="list-style-type: none"> • Number of consolidated and/or shared services studies completed • Number of regional school districts assisted

	<ul style="list-style-type: none">• Work with local School Districts on enrollment projections to identify current and future needs	
To protect water quality	<ul style="list-style-type: none">• Complete and implement regional water resources projects and programs	<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 and Green Infrastructure practices
To develop and implement hazard mitigation plans that comply with state and national standards	<ul style="list-style-type: none">• Continue to provide All-Hazard Planning assistance to Counties and Municipalities for the development or revision of All-Hazard Mitigation Plans	<ul style="list-style-type: none">• Completion, revision and implementation of All-Hazard Mitigation Plans• Number of professional support inquiries

Chapter 7 – 2010-2011 Plan of Action

This section provides an overview of ongoing G/FLRPC activities, activities that G/FLRPC has undertaken in 2010, and activities that G/FLRPC can pursue going forward. These actions involve work on projects in economic development, planning, and coordination and training that promotes the economic development goals and objectives of the comprehensive economic development strategy.

7.1 Community and Business Development

- A) Continue to foster relationships and build partnerships with public, private and non-profit organizations and entities in the Region.
 - 1. Continue to cultivate relationships with commercial banks and other financial institutions to provide finance packaging and options for private sector investment.
 - 2. 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.
- B) 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.
 - 1. 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 identified regional clusters.
 - 2. Support regional economic development organizations with efforts to improve technology clusters.
 - 3. Continue to assist regional partners with the development and implementation of regional economic development plans.
- C) 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.
 - 1. Support regional cluster organizations with gathering information and data, and through promoting public and private sector investment in commercialization centers.
 - 2. Work with regional stakeholders in identifying and developing regional economic development clusters and emerging technologies.
 - 3. Provide assistance to members of the alternative energy cluster linking them with other regional partners to support the development of ethanol and other regional alternative energy initiatives.
- D) 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.
 - 1. Support the improvement of telecommunication infrastructure throughout the entire Region.
 - 2. Assist with the development of telecommunication inventories and assessments for areas of the Region that do not have this information compiled.

3. Pursue the development of a regional telecommunications infrastructure development plan to guide private sector investment in telecommunications throughout the Region.
 4. Continue to partner with the regional Metropolitan Planning Organization, Genesee Transportation Council, on planning and transportation issues that impact the G-FL Region.
 5. Develop revisions to the Transportation Analysis Zones (TAZ).
 6. Continue to produce the annual Land Use Monitoring Report.
- E) Continue to work with partners to enhance the Region's ability to compete during the site selection process.
1. Provide data, information assistance, and mapping for use in the site selection process.
 2. Assist regional partners with the identification and application of available grant and loan resources.
 3. Continue to partner with and support the efforts of County Industrial Development Agencies/Economic Development Departments regarding site selection and business attraction.
- F) Work with various private and public sector partners to encourage the redevelopment of brownfield sites.
1. Propose a community-wide brownfield assessment that develops a regional brownfield education program, inventory and database and redevelopment/revitalization plan.
 2. Administer or assist in Brownfield Opportunity Area programs within the Region.
- G) Support entrepreneurial activities and programs throughout the Region.
1. Support the activities of regional organizations that promote entrepreneurship and small business development.
- H) Work with small and medium sized businesses and organizations that support them to deliver financing options and other economic development resources.
1. Continue to administer and diversify G/FLRPC's EDA Revolving Loan Fund program and portfolio and work with other regional partners to link available regional revolving loan funds with businesses in need of financing.
 2. Continue to foster relationships with private sector investors to package with the G/FLRPC revolving loan fund.
 3. Work with regional economic development stakeholders to cultivate new economic development programs and to identify new funding sources.
- I) Assist in the revitalization of main streets and community centers throughout the Region.
1. Continue to seek project funding, provide technical assistance and facilitate dialogue amongst regional partners.

- J) Assist in the development of the Region as a tourist destination.
 - 1. Work with local tourist organizations to identify and capture opportunities in the Region, such as the Erie Canal.
 - 2. Continue to act as a resource regarding regional blueways trails.
 - 3. Pursue opportunities to educate leadership on the economic impacts of tourism within the Region.
 - 4. Support the efforts of regional partners in identifying and securing funding for tourism promotion.

7.2 Professional Support

- A) G/FLRPC will continue to support regional economic development partners and stakeholders with workforce and economic development initiatives undertaken within the Region to help attract and create jobs.
- B) Continue to provide assistance to municipalities and local governments with the development and implementation of economic development projects.
 - 1. Assist local governments in the development of studies analyzing the impacts of consolidation and/or sharing of services.
 - 2. Work with local School Districts on enrollment projections to identify current and future needs, as well as forecasting methods to finance potential growth.
- C) Provide GIS/Remote Sensing assistance and support through activities such as mapping and database creation to support economic development functions.
- D) Provide Hazard Mitigation Services that comply with state and national standards.
 - 1. Continue to provide All-Hazard Planning assistance to Counties and Municipalities for the development or revision of All-Hazard Mitigation Plans.

7.3 State Data Center Affiliate Program

- A) Continue to fill information and data services requests from citizens, businesses, not-for-profit organizations and public agencies.
- B) Maintain socio-economic and demographic data. An aspect of this service is a dedicated section of G/FLRPC's website featuring or linking to currently available data.
 - 1. Partner with the New York State Data Center and university centers to deliver improved data to regional stakeholders.

7.4 Coordination and Training

- A) Hold workshops to train and inform local and county officials and others about land use regulations and emerging planning and development issues.
 - 1. Continue to hold Regional Local Government Workshops to educate local government officials, municipal council and board members, elected officials and others stakeholders.
 - 2. G/FLRPC will continue to facilitate Regional Roundtable discussions on critical regional economic development and planning issues.
- B) 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.
 - 1. G/FLRPC staff will continue to attend training courses and conferences that will enhance their economic development aptitudes.
- C) Update 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.

Appendices

Appendix 1 - CEDS Stakeholder Input Session Invitation 2010



**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:

- ♦ Ramada Geneva Lakefront
41 Lakefront Drive, (Rt 5 & 20), Geneva, NY 14456
Monday, June 28 from 9:00am-11:00am
- ♦ Ebenezer Watts Conference Center
49 South Fitzhugh Street, Rochester, NY 14614
Tuesday, June 29 from 9:00am-11:00am
- ♦ Genesee County, County Building II
3837 West Main Street Road, Batavia, NY 14020
Wednesday, June 30 from 9:00am-11:00am

If you plan on attending, please contact Greg Albert
at (585) 454-0190 ext. 18 or galbert@gflrpc.org

For additional information about the CEDS visit [http://www.gflrpc.org/
ProgramAreas/EconomicDevelopment/CEDS.htm](http://www.gflrpc.org/ProgramAreas/EconomicDevelopment/CEDS.htm)

Appendix 2 - CEDS Summary Sheet

**Genesee/Finger Lakes Regional Planning Council
Comprehensive Economic Development Strategy
Goals (2010-2011)**

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

- To continue to work with federal, state and local public and private sector partners to secure and leverage funding for the retention and expansion of existing industries
- To continue to work with partners on maintaining, developing and marketing economic development 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 regional workforce training and workforce development efforts
- To improve the economic development and business climate within New York State and the Finger Lakes Region

Goal III: Strengthen Agriculture and Agri-business

- To facilitate the integration of agriculture into the alternative fuel sector
- To continue to educate and train communities on agricultural land use and economic development issues
- To continue to work with economic development partners to establish, maintain, and market programs and initiatives targeted to agriculture and agri-business

Goal IV: Promote Entrepreneurship and Innovation and Encourage Small Business Development

- 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 organizations
- To increase the number and success of small businesses along main streets and at community centers

Goal V: Assist in Improving the Skills of the District's Workforce

- To support the Workforce Investment Boards and other workforce organizations with training workers for high-skill technical and advanced manufacturing careers
- To assist in linking educational partners with economic development groups and businesses

Goal VI: Assist in Improving the Infrastructure of the District

- To improve transportation networks in the Region
- To improve telecommunications in the Region
- To support the establishment of shovel-ready sites within the Region
- To improve the electrical grid in the Region

Goal VII: Enhance Tourism and Marketing Efforts within the District

- To further develop the Finger Lakes Region as a destination location
- To further develop and promote the recreational attributes of the Region
- To utilize the Erie Canal as a tourism opportunity

Goal VIII: Support the Development of Targeted Regional Clusters; including Advanced Manufacturing and Alternative Energy within the District

- To stabilize job losses in the manufacturing sector
- To bolster the competitiveness of the Region's clusters
- To improve sustainability through improving opportunities for alternative energy

Goal IX: Strengthen Regional Coordination and Collaboration

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

Goal X: Educate Leadership and the Community regarding Economic Development and Sustainable Development Practices

- To continue to educate and train communities on changing trends in economic development
- To resolve issues of development related to brownfield sites
- To encourage efficient land use and development patterns
- To encourage efficient local governments
- To protect water quality
- To develop and implement hazard mitigation plans that comply with state and national standards

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)
Construction	236	Construction of Buildings
	237	Heavy and Civil Engineering Construction
	238	Specialty Trade Contractors
Manufacturing	311	Food Manufacturing
	312	Beverage & Tobacco Product Manufacturing
	313	Textile Mills
	314	Textile Product Mills
	315	Apparel Manufacturing
	321	Wood Product Manufacturing
	322	Paper Manufacturing
	323	Printing and Related Support Activities
	324	Petroleum & Coal Products Manufacturing
	325	Chemical Manufacturing
	326	Plastics & Rubber Products Manufacturing
	327	Nonmetallic Mineral Product Manufacturing
	331	Primary Metal Manufacturing
	332	Fabricated Metal Product Manufacturing
	333	Machinery Manufacturing
	334	Computer and Electronic Product Manufacturing
	335	Electrical Equipment and Appliances
	336	Transportation Equipment Manufacturing
	337	Furniture and Related Product Manufacturing
	339	Miscellaneous Manufacturing

Table A-3 – Major Industry Sectors, NAICS Code and Industry Subsectors Present in the G-FL Region (continued)		
Major Industry Sector	NAICS	Industry Subsector
Wholesale Trade	423	Merchant Wholesalers, Durable Goods
	424	Merchant Wholesalers, Nondurable Goods
	425	Electronic Markets and Agents/Brokers
Retail Trade	441	Motor Vehicle and Parts Dealers
	442	Furniture and Home Furnishings Stores
	443	Electronics and Appliance Stores
	444	Building Material & Garden Supply Stores
	445	Food and Beverage Stores
	446	Health and Personal Care Stores
	447	Gasoline Stations
	448	Clothing and Clothing Accessories Stores
	451	Sporting Goods/Hobby/Book/Music Stores
	452	General Merchandise Stores
	453	Miscellaneous Store Retailers
	454	Nonstore Retailers
Transportation and Warehousing	481	Air Transportation
	484	Truck Transportation
	485	Transit and Ground Passenger Transport
	486	Pipeline Transportation
	487	Scenic and Sightseeing Transportation
	488	Support Activities for Transportation
	492	Couriers and Messengers
Information	493	Warehousing and Storage
	511	Publishing Industries
	512	Motion Picture & Sound Recording
	515	Broadcasting (except Internet)
	516	Internet Publishing and Broadcasting
	517	Telecommunications
	518	ISPs, Search Portals, & Data Processing
Finance and Insurance	519	Other Information Services
	522	Credit Intermediation & Related Activity
	523	Securities and Commodity Contracts
	524	Insurance Carriers & Related Activities
Real Estate, Rental and Leasing	525	Funds, Trusts & Other Financial Vehicles
	531	Real Estate
	532	Rental and Leasing Services
	533	Lessors, Nonfinancial Intangible Assets

Table A-3 – Major Industry Sectors, NAICS Code and Industry Subsectors Present in the G-FL Region (continued)

Major Industry Sector	NAICS	Industry Subsector
Professional and Technical Services	541	Professional and Technical Services
Management of Companies and Enterprises	551	Management of Companies and Enterprises
Administrative and Support and Waste Management and Remediation Services	561	Administrative and Support Services
	562	Waste Management and Remediation Service
Health Care and Social Assistance	611	Educational Services
	621	Ambulatory Health Care Services
	622	Hospitals
	623	Nursing and Residential Care Facilities
	624	Social Assistance
Arts, Entertainment and Recreation	711	Performing Arts and Spectator Sports
	712	Museums, Parks and Historical Sites
	713	Amusement, Gambling & Recreation
Accommodation and Food Services	721	Accommodation
	722	Food Services and Drinking Places
Other Services (except Public Administration)	811	Repair and Maintenance
	812	Personal and Laundry Services
	813	Membership Organizations & Associations
	814	Private Households
Government		Federal Government
		State Government
		Local Government
Unclassified		Unclassified

Appendix 4 - Economic Indicators for the G-FL Region by Industry Subsector (2009)

Table A-4 – Establishments, Employment, Average Annual Wage for the G-FL Region by Industry Subsector (2009)			
Industry Subsector	Establishments	Employment	Average Annual Wage
Crop Production	270	3,513	\$25,207
Animal Production	153	2,290	\$30,817
Forestry and Logging	7	31	\$28,504
Agriculture & Forestry Support Activity	40	316	\$22,743
Mining (except Oil and Gas)	35	613	\$50,728
Utilities	25	1,950	\$88,106
Construction of Buildings	895	4,955	\$48,444
Heavy and Civil Engineering Construction	109	1,904	\$54,887
Specialty Trade Contractors	1,776	11,596	\$46,983
Food Manufacturing	123	5,561	\$43,059
Beverage & Tobacco Product Manufacturing	49	1,420	\$31,499
Textile Mills	5	236	\$50,235
Textile Product Mills	14	251	\$35,282
Apparel Manufacturing	11	835	\$30,208
Wood Product Manufacturing	53	491	\$29,156
Paper Manufacturing	38	1,615	\$46,273
Printing and Related Support Activities	145	2,890	\$41,793
Petroleum & Coal Products Manufacturing	7	137	\$57,613
Chemical Manufacturing	39	8,656	\$74,230
Plastics & Rubber Products Manufacturing	75	5,030	\$42,147
Nonmetallic Mineral Product Mfg	59	1,554	\$44,006
Primary Metal Manufacturing	15	431	\$47,007
Fabricated Metal Product Manufacturing	324	7,917	\$44,650
Machinery Manufacturing	275	13,383	\$67,483
Computer and Electronic Product Mfg	117	8,954	\$67,170
Electrical Equipment and Appliances	24	1,577	\$50,614
Transportation Equipment Manufacturing	30	3,218	\$53,177
Furniture and Related Product Mfg	54	710	\$36,142
Miscellaneous Manufacturing	112	4,776	\$62,198
Merchant Wholesalers, Durable Goods	804	10,890	\$58,899
Merchant Wholesalers, Nondurable Goods	301	5,150	\$58,297
Electronic Markets and Agents/Brokers	433	1,791	\$68,728
Motor Vehicle and Parts Dealers	505	7,001	\$38,213
Furniture and Home Furnishings Stores	189	1,579	\$28,927
Electronics and Appliance Stores	199	1,875	\$33,617
Building Material & Garden Supply Stores	334	5,097	\$29,810
Food and Beverage Stores	582	16,468	\$18,706
Health and Personal Care Stores	300	3,246	\$32,252
Gasoline Stations	421	3,308	\$17,455
Clothing and Clothing Accessories Stores	505	4,914	\$14,746
Sporting Goods/Hobby/Book/Music Stores	240	2,485	\$15,675
General Merchandise Stores	195	10,540	\$18,878
Miscellaneous Store Retailers	382	2,848	\$18,810
Nonstore Retailers	155	1,508	\$32,818

Table A-4 – Establishments, Employment, Average Annual Wage for the G-FL Region by Industry Subsector (2009) (continued)

Industry Subsector	Establishments	Employment	Average Annual Wage
Air Transportation	18	261	\$45,863
Truck Transportation	271	2,592	\$38,431
Transit and Ground Passenger Transport	61	2,579	\$19,258
Pipeline Transportation	10	32	\$77,336
Scenic and Sightseeing Transportation	8	33	\$24,752
Support Activities for Transportation	79	648	\$39,581
Couriers and Messengers	65	1,276	\$38,950
Warehousing and Storage	59	1,605	\$37,200
Publishing Industries	101	2,835	\$42,798
Motion Picture & Sound Recording	55	528	\$19,947
Broadcasting (except Internet)	29	848	\$45,157
Telecommunications	98	4,518	\$67,923
ISPs, Search Portals, & Data Processing	57	639	\$76,565
Other Information Services	62	580	\$38,972
Credit Intermediation & Related Activity	514	6,507	\$48,654
Securities and Commodity Contracts	295	1,572	\$100,100
Insurance Carriers & Related Activities	563	6,524	\$59,887
Funds, Trusts & Other Financial Vehicles	16	82	\$146,984
Real Estate	846	5,190	\$30,739
Rental and Leasing Services	211	1,782	\$32,674
Lessors, Nonfinancial Intangible Assets	4	10	\$24,803
Professional and Technical Services	2,715	22,843	\$55,645
Management of Companies and Enterprises	195	12,234	\$79,799
Administrative and Support Services	1,336	23,595	\$30,010
Waste Management and Remediation Service	103	1,392	\$44,479
Educational Services	332	25,058	\$50,743
Ambulatory Health Care Services	1,608	19,407	\$43,780
Hospitals	15	25,600	\$45,210
Nursing and Residential Care Facilities	368	17,854	\$26,366
Social Assistance	664	14,457	\$23,144
Performing Arts and Spectator Sports	116	1,111	\$27,828
Museums, Parks and Historical Sites	25	751	\$21,705
Amusement, Gambling & Recreation	361	6,162	\$15,125
Accommodation	185	3,659	\$19,913
Food Services and Drinking Places	2,132	33,468	\$13,485
Repair and Maintenance	821	4,602	\$32,061
Personal and Laundry Services	658	4,440	\$21,246
Membership Organizations & Associations	979	8,731	\$19,048
Private Households	319	460	\$21,336
Federal Government	260	5,589	\$52,796
State Government	97	14,348	\$53,421
Local Government	637	70,689	\$41,227
Unclassified	503	480	\$23,917
Total, All Industries	28,275	533,223	\$40,843
Total, All Private	27,281	442,597	\$40,222

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 for the G-FL Region by Industry Subsector (2000)			
Industry Subsector	Establishments	Employment	Average Annual Wage*
Crop Production	268	2,944	\$22,529
Animal Production	147	1,934	\$27,251
Forestry and Logging	5	68	\$34,666
Agriculture & Forestry Support Activity	41	557	\$24,750
Mining (except Oil and Gas)	3	16	\$57,004
Utilities	42	400	\$47,981
Construction of Buildings	761	4,947	\$46,022
Heavy and Civil Engineering Construction	127	1,993	\$54,524
Specialty Trade Contractors	1,792	13,050	\$44,370
Food Manufacturing	121	6,214	\$39,459
Beverage & Tobacco Product Manufacturing	22	1,685	\$56,775
Textile Mills	7	282	\$51,959
Textile Product Mills	17	328	\$30,534
Apparel Manufacturing	16	1,032	\$32,660
Wood Product Manufacturing	56	837	\$30,043
Paper Manufacturing	43	2,265	\$42,967
Printing and Related Support Activities	170	3,468	\$45,876
Petroleum & Coal Products Manufacturing	22	173	\$59,880
Chemical Manufacturing	49	24,095	\$72,105
Plastics & Rubber Products Manufacturing	104	7,346	\$40,549
Nonmetallic Mineral Product Manufacturing	67	2,329	\$47,729
Primary Metal Manufacturing	11	525	\$52,550
Fabricated Metal Product Manufacturing	340	11,100	\$43,849
Machinery Manufacturing	330	22,446	\$67,858
Computer and Electronic Product Mfg	107	9,912	\$66,967
Electrical Equipment and Appliances	25	1,749	\$43,571
Transportation Equipment Manufacturing	31	7,817	\$64,604
Furniture and Related Product Manufacturing	60	772	\$34,793
Miscellaneous Manufacturing	111	5,550	\$56,806
Merchant Wholesalers, Durable Goods	968	12,302	\$58,260
Merchant Wholesalers, Nondurable Goods	352	5,391	\$50,994
Electronic Markets and Agents/Brokers	367	1,431	\$66,113
Motor Vehicle and Parts Dealers	507	7,640	\$40,867
Furniture and Home Furnishings Stores	206	1,845	\$30,327
Electronics and Appliance Stores	225	1,945	\$40,555
Building Material & Garden Supply Stores	345	5,406	\$27,710
Food and Beverage Stores	595	18,310	\$17,067
Health and Personal Care Stores	283	3,630	\$24,016
Gasoline Stations	479	3,810	\$18,177
Clothing and Clothing Accessories Stores	522	4,849	\$15,723
Sporting Goods/Hobby/Book/Music Stores	254	2,877	\$15,941
General Merchandise Stores	162	9,508	\$18,672
Miscellaneous Store Retailers	480	3,351	\$18,778
Nonstore Retailers	128	2,406	\$31,657

Table A-5 – Establishments, Employment, Average Annual Wage for the G-FL Region by Industry Subsector (2000) (continued)			
Industry Subsector	Establishments	Employment	Average Annual Wage*
Air Transportation	13	377	\$55,684
Truck Transportation	332	3,185	\$38,556
Transit and Ground Passenger Transport	53	2,291	\$27,613
Pipeline Transportation	8	40	\$69,494
Scenic and Sightseeing Transportation	7	35	\$21,563
Support Activities for Transportation	66	687	\$32,984
Couriers and Messengers	44	2,040	\$32,690
Warehousing and Storage	44	677	\$34,073
Publishing Industries	120	3,313	\$45,413
Motion Picture & Sound Recording	69	994	\$15,361
Broadcasting (except Internet)	25	980	\$44,801
Telecommunications	102	5,443	\$89,299
ISPs, Search Portals, & Data Processing	95	1,823	\$56,369
Other Information Services	41	293	\$15,319
Credit Intermediation & Related Activity	455	7,507	\$46,489
Financial Investment & Related Activity	176	1,877	\$115,257
Insurance Carriers & Related Activities	762	5,734	\$51,977
Funds, Trusts & Other Financial Vehicles	11	72	\$50,481
Real Estate	744	5,286	\$28,616
Rental and Leasing Services	220	2,190	\$28,754
Lessors, Nonfinancial Intangible Assets^	-	-	-
Professional and Technical Services	2,497	23,941	\$55,640
Management of Companies and Enterprises	131	10,948	\$76,501
Administrative and Support Services	1,135	25,562	\$25,341
Waste Management and Remediation Service	70	1,223	\$43,076
Educational Services	275	17,377	\$51,309
Ambulatory Health Care Services	1,528	18,254	\$37,503
Hospitals	18	23,958	\$37,265
Nursing and Residential Care Facilities	270	14,333	\$25,678
Social Assistance	612	11,409	\$22,094
Performing Arts and Spectator Sports	125	1,108	\$31,884
Museums, Parks and Historical Sites	20	747	\$20,473
Amusement, Gambling & Recreation	320	5,292	\$16,516
Accommodation	143	4,571	\$20,308
Food Services and Drinking Places	2,135	32,571	\$13,094
Repair and Maintenance	776	4,063	\$32,532
Personal and Laundry Services	684	4,292	\$20,673
Membership Organizations & Associations	803	7,095	\$19,033
Private Households	472	760	\$16,209
Federal Government	191	5,463	\$51,616
State Government	96	14,635	\$51,048
Local Government	574	65,766	\$36,419
Unclassified	157	308	\$17,385
Total, All Industries	27,211	561,926	\$40,887
Total, All Private	26,350	476,062	\$41,069
Source: Quarterly Census of Employment and Wages * Average Annual wage expressed in 2009 dollars			
^Subsector not apart of 2000 QCEW analysis			

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

Table A-6 – Change in Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Sector (2000-2009)						
Industry Sector	Change in Establishments		Change in Employment		Change in Average Annual Wage**	
	Number	Percent	Number	Percent	Dollars	Percent
Crop Production	2	0.75%	569	19.33%	\$2,678	11.89%
Animal Production	6	4.08%	356	18.41%	\$3,566	13.09%
Forestry and Logging	2	40.00%	-37	-54.41%	-\$6,162	-17.78%
Agriculture Forestry Support Activity	-1	-2.44%	-241	-43.27%	-\$2,007	-8.11%
Mining (except Oil and Gas)	32	1066.67%	597	3731.25%	-\$6,276	-11.01%
Utilities	-17	-40.48%	1,550	387.50%	\$40,125	83.63%
Construction of Buildings	134	17.61%	8	0.16%	\$2,422	5.26%
Heavy and Civil Engineering Construction	-18	-14.17%	-89	-4.47%	\$363	0.67%
Specialty Trade Contractors	-16	-0.89%	-1,454	-11.14%	\$2,613	5.89%
Food Manufacturing	2	1.65%	-653	-10.51%	\$3,600	9.12%
Beverage Tobacco Product Manufacturing	27	122.73%	-265	-15.73%	-\$25,276	-44.52%
Textile Mills	-2	-28.57%	-46	-16.31%	-\$1,724	-3.32%
Textile Product Mills	-3	-17.65%	-77	-23.48%	\$4,748	15.55%
Apparel Manufacturing	-5	-31.25%	-197	-19.09%	-\$2,452	-7.51%
Wood Product Manufacturing	-3	-5.36%	-346	-41.34%	-\$887	-2.95%
Paper Manufacturing	-5	-11.63%	-650	-28.70%	\$3,306	7.69%
Printing and Related Support Activities	-25	-14.71%	-578	-16.67%	-\$4,083	-8.90%
Petroleum Coal Products Manufacturing	-15	-68.18%	-36	-20.81%	-\$2,267	-3.79%
Chemical Manufacturing	-10	-20.41%	-15,439	-64.08%	\$2,125	2.95%
Plastics Rubber Products Manufacturing	-29	-27.88%	-2,316	-31.53%	\$1,598	3.94%
Nonmetallic Mineral Product Mfg	-8	-11.94%	-775	-33.28%	-\$3,723	-7.80%
Primary Metal Manufacturing	4	36.36%	-94	-17.90%	-\$5,543	-10.55%
Fabricated Metal Product Manufacturing	-16	-4.71%	-3,183	-28.68%	\$801	1.83%
Machinery Manufacturing	-55	-16.67%	-9,063	-40.38%	-\$375	-0.55%
Computer and Electronic Product Mfg	10	9.35%	-958	-9.67%	\$203	0.30%
Electrical Equipment and Appliances	-1	-4.00%	-172	-9.83%	\$7,043	16.16%
Transportation Equipment Manufacturing	-1	-3.23%	-4,599	-58.83%	-\$11,427	-17.69%
Furniture and Related Product Mfg	-6	-10.00%	-62	-8.03%	\$1,349	3.88%
Miscellaneous Manufacturing	1	0.90%	-774	-13.95%	\$5,392	9.49%
Merchant Wholesalers, Durable Goods	-164	-16.94%	-1,412	-11.48%	\$639	1.10%
Merchant Wholesalers, Nondurable Goods	-51	-14.49%	-241	-4.47%	\$7,303	14.32%
Electronic Markets and Agents Brokers	66	17.98%	360	25.16%	\$2,615	3.96%
Motor Vehicle and Parts Dealers	-2	-0.39%	-639	-8.36%	-\$2,654	-6.49%
Furniture and Home Furnishings Stores	-17	-8.25%	-266	-14.42%	-\$1,400	-4.62%
Electronics and Appliance Stores	-26	-11.56%	-70	-3.60%	-\$6,938	-17.11%
Building Material Garden Supply Stores	-11	-3.19%	-309	-5.72%	\$2,100	7.58%
Food and Beverage Stores	-13	-2.18%	-1,842	-10.06%	\$1,639	9.60%
Health and Personal Care Stores	17	6.01%	-384	-10.58%	\$8,236	34.29%
Gasoline Stations	-58	-12.11%	-502	-13.18%	-\$722	-3.97%
Clothing and Clothing Accessories Stores	-17	-3.26%	65	1.34%	-\$977	-6.21%
Sporting Goods Hobby Book Music Stores	-14	-5.51%	-392	-13.63%	-\$266	-1.67%
General Merchandise Stores	33	20.37%	1,032	10.85%	\$206	1.10%
Miscellaneous Store Retailers	-98	-20.42%	-503	-15.01%	\$32	0.17%
Nonstore Retailers	27	21.09%	-898	-37.32%	\$1,161	3.67%

Table A-6 – Change in Establishments, Employment, and Average Annual Wage in the G-FL Region by Industry Sector (2000-2009) (continued)

Industry Sector	Change in Establishments		Change in Employment		Change in Average Annual Wage**	
	Number	Percent	Number	Percent	Dollars	Percent
Air Transportation	5	38.46%	-116	-30.77%	-\$9,821	-17.64%
Truck Transportation	-61	-18.37%	-593	-18.62%	-\$125	-0.32%
Transit and Ground Passenger Transport	8	15.09%	288	12.57%	-\$8,355	-30.26%
Pipeline Transportation	2	25.00%	-8	-20.00%	\$7,842	11.28%
Scenic and Sightseeing Transportation	1	14.29%	-2	-5.71%	\$3,189	14.79%
Support Activities for Transportation	13	19.70%	-39	-5.68%	\$6,597	20.00%
Couriers and Messengers	21	47.73%	-764	-37.45%	\$6,260	19.15%
Warehousing and Storage	15	34.09%	928	137.08%	\$3,127	9.18%
Publishing Industries	-19	-15.83%	-478	-14.43%	-\$2,615	-5.76%
Motion Picture Sound Recording Ind.	-14	-20.29%	-466	-46.88%	\$4,586	29.85%
Broadcasting (except Internet)	4	16.00%	-132	-13.47%	\$356	0.79%
Telecommunications	-4	-3.92%	-925	-16.99%	-\$21,376	-23.94%
ISPs, Search Portals, Data Processing	-38	-40.00%	-1,184	-64.95%	\$20,196	35.83%
Other Information Services	21	51.22%	287	97.95%	\$23,653	154.40%
Credit Intermediation Related Activity	59	12.97%	-1,000	-13.32%	\$2,165	4.66%
Securities and Commodity Contracts	119	67.61%	-305	-16.25%	-\$15,157	-13.15%
Insurance Carriers Related Activities	-199	-26.12%	790	13.78%	\$7,910	15.22%
Funds, Trusts Other Financial Vehicles	5	45.45%	10	13.89%	\$96,503	191.17%
Real Estate	102	13.71%	-96	-1.82%	\$2,123	7.42%
Rental and Leasing Services	-9	-4.09%	-408	-18.63%	\$3,920	13.63%
Lessor, Nonfinancial Intangible Assets^	n/a	n/a	n/a	n/a	n/a	n/a
Professional and Technical Services	218	8.73%	-1,098	-4.59%	\$5	0.01%
Management of Companies and Enterprises	64	48.85%	1,286	11.75%	\$3,298	4.31%
Administrative and Support Services	201	17.71%	-1,967	-7.70%	\$4,669	18.43%
Waste Management and Remediation Service	33	47.14%	169	13.82%	\$1,403	3.26%
Educational Services	57	20.73%	7,681	44.20%	-\$566	-1.10%
Ambulatory Health Care Services	80	5.24%	1,153	6.32%	\$6,277	16.74%
Hospitals	-3	-16.67%	1,642	6.85%	\$7,945	21.32%
Nursing and Residential Care Facilities	98	36.30%	3,521	24.57%	\$688	2.68%
Social Assistance	52	8.50%	3,048	26.72%	\$1,050	4.75%
Performing Arts and Spectator Sports	-9	-7.20%	3	0.27%	-\$4,056	-12.72%
Museums, Parks and Historical Sites	5	25.00%	4	0.54%	\$1,232	6.02%
Amusement, Gambling Recreation Ind.	41	12.81%	870	16.44%	-\$1,391	-8.42%
Accommodation	42	29.37%	-912	-19.95%	-\$395	-1.94%
Food Services and Drinking Places	-3	-0.14%	897	2.75%	\$391	2.99%
Repair and Maintenance	45	5.80%	539	13.27%	-\$471	-1.45%
Personal and Laundry Services	-26	-3.80%	148	3.45%	\$573	2.77%
Membership Organizations Associations	176	21.92%	1,636	23.06%	\$15	0.08%
Private Households	-153	-32.42%	-300	-39.47%	\$5,127	31.63%
Federal Government	69	36.13%	126	2.31%	\$1,180	2.29%
State Government	1	1.04%	-287	-1.96%	\$2,373	4.65%
Local Government	63	10.98%	4,923	7.49%	\$4,808	13.20%
Unclassified	346	220.38%	172	55.84%	\$6,532	37.57%
Total, All Industries	5	38.46%	-116	-30.77%	-\$9,821	-17.64%
Total, All Private	-61	-18.37%	-593	-18.62%	-\$125	-0.32%

Source: Quarterly Census of Employment and Wages ** Average Annual wage expressed in 2009 dollars
^Subsector not apart of 2000 QCEW analysis

Appendix 7 - Stakeholder Input Session Attendees, 2010

Table A-7 – CEDS Stakeholder Input Session, Attendee List, 2010	
Name	Organization and/or Affiliation
Mitch Donovan	Victor Chamber of Commerce
Ken Lauderdale	Town of Savannah
Robert Aronson	Seneca County Industrial Development Agency
Steven Brusso	Evans Chemetics LP/Seneca County IDA Board
Valerie Bassett	City of Geneva Industrial Development Agency
Marty Aman	Wayne County Water & Sewer Authority
Dave Lyon	Wayne County Water & Sewer Authority
Rob Gladden	Geneva Chamber of Commerce
Bobbie Harrison	Cornell Cooperative Extension Seneca County
Suzanne Sinclair	Seneca County
Cynthia Kimble	Finger Lakes Tourism Alliance
Jeff Shipley	Seneca County Chamber of Commerce
Susan Noble	Cornell Agriculture & Food Technology Park
Shawna Bonshak	Yates County Department of Planning
Steve Griffin	Yates County Industrial Development Agency
Drew Shapiro	Wyoming County Department of Planning
James Hoffman	Town of Williamson
Maureen Duggan	Ontario County IDA
Jay Martinez	Greater Rochester Enterprise
Bill Wynne	Cornell Cooperative Extension of Monroe County
Rich Perrin	Genesee Transportation Council
Christina Bakewicz	Rochester Works
Glen Cooke	Webster Community Coalition for Economic Development
Tom Goodwin	Monroe County Planning
Greg Parker	Empire State Development
Jody Pollot	Genesee Transportation Council
Andy Harlan	RIT CIMS
Jim Whipple	Orleans Economic Development Agency
Gabrielle Barone	Orleans Economic Development Agency
Lina LaMattina	Genesee Community College
Esther Leadley	Genesee County Legislature
Alexander Leadley	Internship
Laura Lane	Wyoming County Chamber of Commerce
Wayne Hale	Orleans County Planning Department
Steve Hyde	Genesee County Economic Development Center
Mark Masse	Genesee County Economic Development Center
Sarah Kohl	Genesee County Economic Development Center
Andrea Taylor	Senator Gillibrand's Office
Jill Babinski	Genesee County Planning
Paul Cole	Representative Chris Lee's Office
Patrick Rountree	Livingston County Department of Economic Development

Appendix 8 - CEDS Stakeholder Input Session Presentation, 2010

2010 Comprehensive
Economic Development
Strategy



GENESEE/FINGER LAKES
Regional Planning Council

Stakeholder Input Session



Agenda

- G/FLRPC
- Comprehensive Economic Development Strategy
- Role of the Stakeholder
- Snapshot of the Region
- Development of a Vision
 - Analysis
 - Setting goals
 - Priority projects
 - Evaluation
- Next Steps/Questions



G/FLRPC

- Established 1977
- Nine Member Counties
- Economic Development District
- ED Program
- Funding/Support



CEDS





- US Department of Commerce Economic Development Administration
- Continuous Planning Process
 - Analyze Regional Economy
 - Define ED Goals and Objectives
 - Identify Project Opportunities
- Guides Regional Economic Development
 - Action Plan
 - Opens up funding opportunities





Role of the Stakeholder

- Identify strengths, weaknesses, opportunities and threats to the region
- Create a vision for the region
 - Set regional goals, objectives, and priority projects
 - Assist in Implementation
- Aid in development of G/FLRPC work program

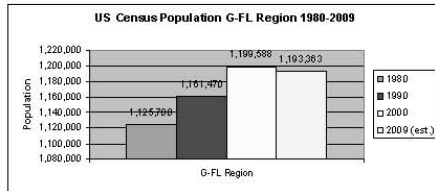


Snapshot of the Region

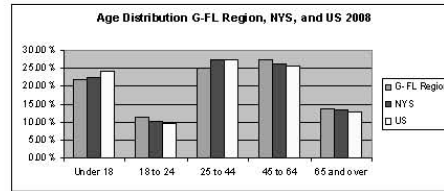
- Population
- Age
- Income
- Poverty



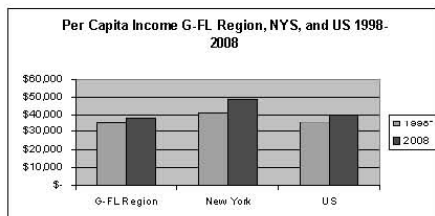
Population



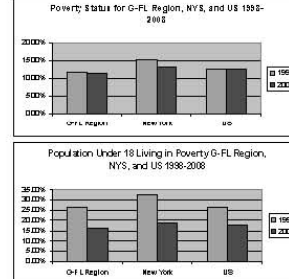
Age



Income



Poverty



Snapshot of the Region

Quality of Life

- Housing
- Education
- Health services
- Parks and recreation
- Cultural & tourist attractions



Snapshot of the Region

Labor force characteristics

- Unemployment
- Average annual employment

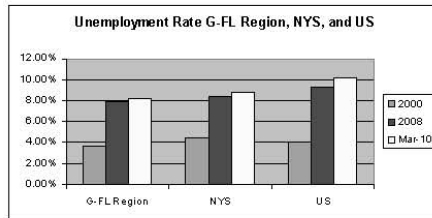
Employment

- Major industry sectors
- Clusters

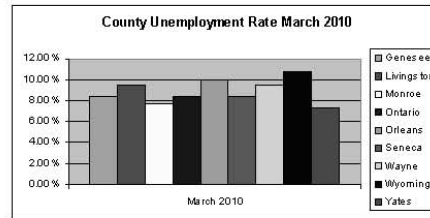
Agricultural economic statistics



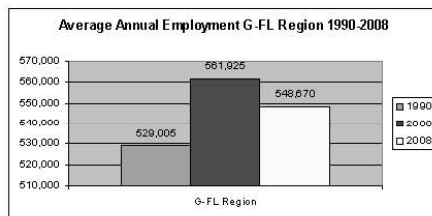
Unemployment



County Unemployment



Employment



Average Annual Employment County 2008

County	2008 Employment Total, All Industries
Genesee	23,857
Livingston	20,380
Monroe	379,665
Ontario	49,533
Orleans	12,980
Seneca	11,150
Wayne	30,118
Wyoming	14,201
Yates	6,911



Major Industry Sectors 2008

Genesee Finger Lakes Region

■ Top 3 Sectors

- Government (90,446)
- Manufacturing (77,498)
- Health Care and Social Assistance (75,709)

■ Largest Net Job Growth 2000-2008

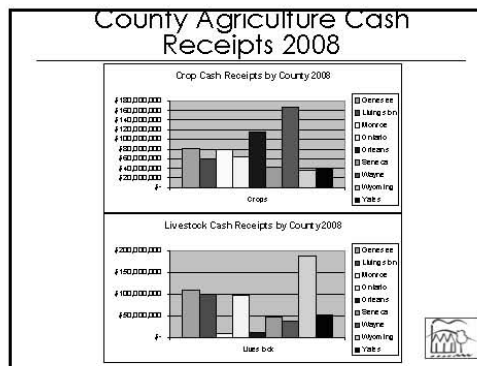
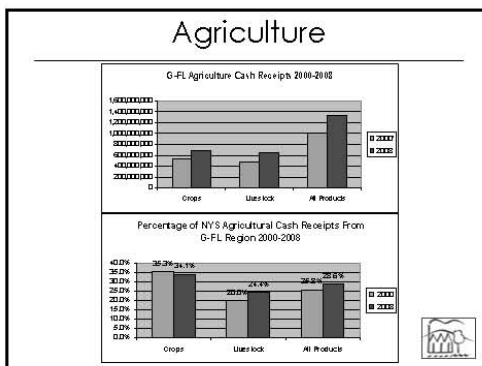
- Education (7,853)
- Health Care and Social Assistance (7,754)
- Government (4,584)



Regional Clusters

- Optics and Imaging
- Alternative Energy
- Advanced Manufacturing
- Food and Beverage Processing
- Information and Communication Technology
- Biomedical Research
- Printing and Publishing





Developing a Vision: Analysis

- **State of the regional economy**
 - Strengths and weaknesses?
 - Growth sectors and clusters?
- **External trends and forces**
 - Opportunities and threats?
 - How is the region positioned nationally and globally?
- **Partners and resources**
 - Who are the important partners in the region?
 - Who can provide resources?

Developing a Vision: Setting Goals

- **Where do we want the region 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?**
- **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

- **July 2010: Meet with County Stakeholders**
- **August 2010: Integrate feedback and comments**
- **September 2010: Submit draft report to G/FLRPC for review and comments**
- **December 2010: Final draft completed and submitted to G/FLRPC**
- **December 2010: Final draft submitted to EDA**

Contact Information

For further information on G/FLRPC and the CEDS

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

or contact Greg Albert at 585-454-0190 x18 or galbert@gflrpc.org

Appendix 9 - CEDS Stakeholder Input Session Notes, 2010

CEDS Stakeholder Input Sessions were held June 28th, 29th, and 30th, 2010 in Geneva, Rochester, and Batavia, NY respectively. The invitation for these sessions can be seen in Appendix 1 and a list of stakeholder session attendees can be seen in Appendix 7. Each session consisted of a presentation followed by a discussion of regional strengths, weaknesses, opportunities and threats. At the conclusion of each session these discussion items were used to help identify regional goals and objectives. To the extent possible each comment under Strengths, Weaknesses, Opportunities and Threats is followed in parentheses with the corresponding goal(s) from Chapter 6 *2010 Goals, Objectives, Strategies and Measures*. Comments under Goals and Objectives are followed in parentheses indicating where they are addressed within the CEDS from the following chapters: Chapter 5 *Development Actions, Efforts and Priorities*, Chapter 6 *2010 Goals, Objectives, Strategies and Measures*, and Chapter 7 *2010 Plan of Action*.

Strengths

- Regional collaboration amongst stakeholders including: GRE, IDAs, G/FLRPC, colleges/universities, etc. (6.2 Goal IX)
- Educational system, including colleges, universities, community colleges, and Cornell Cooperative Extension locations within the Region (6.2 Goal V)
- Presence of significant number of students within the Region (6.2 Goal V)
- Agriculture/agri-business and the positive impact that agriculture has on the cost of municipal services (6.2 Goal III)
- Agricultural entrepreneurship (6.2 Goal III)
- Agriculture friendly policies in place including farmland protection laws and purchase of development rights programs (6.2 Goal III)
- Connection between agriculture and tourism (6.2 Goals III&VII)
- Tourism industry within the Region (6.2 Goal VII)
- Geographic location including Toronto, Buffalo, Syracuse and New York all easily accessible provide close markets for businesses (6.2 Goal VII)
- Region contains both rural and urban areas (6.2 Goal VII)
- Quality of life, parks, recreation and tourism opportunities throughout the Region (6.2 Goal VII)
- Low cost of real estate (6.2 Goal VII)
- Access to fresh water and other natural resources including natural gas (6.2 Goal VII)
- Alternative energy, including wind and “small wind” (6.2 Goal VIII)
- Energy outlook for the Region in 10-20 years (6.2 Goal VII)
- Transportation infrastructure including short-line railroads (6.2 Goal VI)
- Loyal workforce, including the many recent college graduates (6.2 Goal V)
- Diversity of jobs, no longer reliant on the “big three” (Kodak, Xerox and Bausch and Lomb) (6.2 Goals I, II&IV)
- Large number of businesses with less than 300 employees (small business) (6.2 Goal IV)
- Growth in knowledge based industries, including advanced manufacturing (6.2 Goals IV&VIII)
- Entrepreneurship and commercialization successes (6.2 Goal IV)
- Venture capital money is present within the Region (6.2 Goal IV)

- Site location opportunities; land is available for businesses including the Seneca Army Depot, the largest contiguous site in New York State (6.2 Goal II)
- ISCI Western New York, which can serve as a model for other sectors (6.2 Goal II)
- Passion and leadership of local volunteers that are helping to drive economic development (6.2 Goal IX)

Weaknesses

- Workforce development is not aligned with future job opportunities such as the life-science industry (6.2 Goal V)
- Young agriculture workers to replace those retiring (6.2 Goal III)
- Funding for the sustainability of workforce programs (6.2 Goal V)
- Aging workforce present within the Region, with limited variety of skills as they have typically been in the same job for long-term (6.2 Goal V)
- The loss of the Empire Zone program and limited economic development program availability from New York State (6.2 Goals I&II)
- PILOT Increment Financing not widely available (6.2 Goals I&II)
- Delayed payment of benefits to businesses (6.2 Goals I&II)
- State economic development efforts tend to be reactive rather than pro-active (6.2 Goals I&II)
- Infrastructure at shovel-ready sites (water, sewer, etc.) and need larger sites such as a New York State Super-Site (6.2 Goals I, II&VI)
- Funding for shovel-ready sites (6.2 Goals I&II)
- High cost of utilities, property taxes, workers compensation, leading to an unfriendly business climate (6.2 Goals I&II)
- Loss of recent college graduates, “brain drain” (6.2 Goal V)
- Availability of entry-level jobs (6.2 Goal IV)
- Overall loss of jobs within the Region (6.2 Goals I-X)
- Public education systems in certain parts of the Region (6.2 Goal V)
- No long-term focus from regional and state leadership (6.2 Goal X)
- A sustainable long-term plan (6.2 Goal X)
- Overemphasis on job creation rather than investment (6.2 Goal X)
- Large size of government (6.2 Goal X)
- Inability to find volunteers for the many government board positions (6.2 Goal X)
- State budget crisis limiting funding (6.2 Goal X)
- Marketing efforts not as efficient or effective as they could be, “I Love NY” campaign may be effective for all sectors (6.2 Goal VII)
- Availability of funding for marketing and tourism (6.2 Goal VII)
- Availability of entrepreneurship capital in certain sectors (6.2 Goal IV)
- Politics and the upstate/downstate divide making business attraction difficult (6.2 Goal X)
- Regulations and program requirements reduce efficiency and increase the burden on applicants (6.2 Goal X)
- Pace of natural gas regulations are preventing opportunities for potential growth (6.2 Goal VIII)
- Not in my back yard attitudes from residents preventing project opportunities (6.2 Goal X)
- National image of New York State needs to be improved (6.2 Goal VII)

- Need to educate leadership and community on the value of business (6.2 Goals VII&X)
- State mandates/regulations placing financial burden on municipalities (6.2 Goal X)
- Competition within the Region, need to collaborate better (6.2 Goal IX)
- Inequalities amongst telecommunications infrastructure within the Region (6.2 Goal VI)
- Processing facilities within the Region leading to processing occurring outside of the Region (6.2 Goal II)

Opportunities

- Education of the public regarding land-use and cost of services (6.2 Goal X)
- Educating leadership regarding economic development issues and trends (6.2 Goal X)
- Development of a long-term vision and strategy for the Region to capture growth potential (6.2 Goal X)
- Improving workforce development linkages between schools, businesses, and the economic development community (6.2 Goal V)
- Develop sustainable workforce through technology training and skills training (6.2 Goal V)
- Utilize community colleges, colleges and universities to develop workforce skills (6.2 Goal V)
- Leverage working workforce development models for funding (6.2 Goal V)
- Accelerating entrepreneurship, innovation and the growth of young businesses (6.2 Goal IV)
- Ignite the entrepreneur mindset through K-12 curriculum (6.2 Goals IV&V)
- Capture venture capital amongst the regional disposable income (6.2 Goal IV)
- Position the Region to take advantage of the emerging volatile economy (6.2 Goal X)
- Develop asset map of regional economic development assets (6.2 Goal IX)
- Develop and improve infrastructure, including broadband, water, and sewer to make sites shovel ready (6.2 Goal VI)
- Expand the impact of agriculture through marketing and promotion with youth population (6.2 Goal III)
- Develop regional buy in for high technology and green technology companies (6.2 Goal VIII)
- Cultivate volunteers within the Region (6.2 Goal IX)
- Right size government and schools through consolidation or other means (6.2 Goal X)
- Expand marketing efforts for tourism attraction and to educate residents of the natural resources and attractions available locally (6.2 Goal VII)
- Collaborate regional regarding tourism; develop “tourism trails” including history, antiques, water sports, wine, cheese, etc. (6.2 Goal VII)
- Promote and grow wine industry within the Region (6.2 Goal VII)
- Work with state legislature on development of tax abatement program and an increase in economic development programs for attraction and retention of businesses (6.2 Goals I&II)
- Improve funding for businesses (6.2 Goals I, II&IV)
- Work to develop incentives for market rate housing (6.2 Goal II)
- Educate school boards regarding the impact of businesses (6.2 Goal X)
- Grow successful businesses within the Region to add management and headquarters (6.2 Goal II)
- Attract foreign direct investment to the Region (6.2 Goal II)
- Increase opportunities for chambers of commerce to do advocacy and promote the Region (6.2 Goals VII&IX)

- Improve regional collaboration amongst tourism sector including funding collaborative for tourism website (6.2 Goals VII&IX)
- Develop conference center within the Region to help attract new visitors (6.2 Goal VII)
- Further promotion and development of quality of life to help attract higher income population (6.2 Goal VII)
- Utilize skills and knowledge of retired workers to educate entrepreneurs (6.2 Goals IV&V)
- Explore regional opportunities regarding natural gas (6.2 Goal VIII)
- Continue to develop water resources and infrastructure (6.2 Goal VI)
- Encourage rehabilitation and revitalization of Main Streets (6.2 Goal IV)
- Reform government to become more efficient (6.2 Goal X)
- Promote regional climate to market quality of life and opportunities for agriculture (6.2 Goals III&VII)

Threats

- High costs and inefficiency of government (6.2 Goal X)
- High costs of doing business including: property taxes, state mandates, and high labor costs (6.2 Goal X)
- Aging population, leading to increased health care costs (6.2 Goal X)
- Decline of population; including the loss of the 20-35 age cohort; “brain drain” (6.2 Goals I,II&IV)
- Decline in school district enrollment (6.2 Goal V)
- Education curriculum not preparing students for tomorrow’s workforce (6.2 Goal V)
- Aging infrastructure in need of improvements and replacements; roads, water, sewer, etc. (6.2 Goal VI)
- Expansion of government and increasing costs (6.2 Goal X)
- Excessive government spending without an eye on the future; increasing the costs of goods and not leading to private investment (6.2 Goal X)
- Fiscal health of the public sector both federal and state; deficit spending is lowering the quality of life and leading to an increase in future liabilities such as retirement and health care costs (6.2 Goal X)
- Limited economic development incentives from the State since the Empire Zone program was eliminated (6.2 Goals I&II)
- Upstate/downstate divide and the increasing influence of downstate regarding economic development policy (6.2 Goals I, II, X)
- Limited transportation availability for agriculture (6.2 Goals III&VI)
- DEC regulations and immigration reform and the potential impact on the agricultural community (6.2 Goal III)
- Decline in tourism and marketing funding, leading to increased competition from other Regions for tourism dollars (6.2 Goal VII)
- Fragmented communication regionally leading to inefficient program and service delivery (6.2 Goal IX)
- Native American lands not being subject to local environmental laws (6.2 Goal X)
- Overemphasis on incentives for low-income housing programs (6.2 Goal X)

Goals and Objectives

- Development of regional broadband inventory/map (5.1 Table 24 GFL-1; 6.2 Goal VI; 7.1D:1,2&3)
- Completion of economic development asset inventory (5.1 Table 24 GFL-2; 6.2 Goals VI&VII)
- Marketing of regional economic development assets, including the technology corridor along I-90 (Buffalo, Rochester, Syracuse) (6.2 Goal VII; 7.1E:1,2&3, 7.1J:1,2,3&4)
- Improve entrepreneurship funding and access to venture capital to expand innovation and the growth of young firms (5.3 Table 26 L-4 & L-5; 5.4 Table 27 M-2; 6.2 Goal IV; 7.1G:1)
- Collaborate regionally and within Western New York regarding development and implementation of the Regional Entrepreneurship Action Plan (6.2 Goals IV&IX; 7.1A:2, 7.1G:1)
- Improve workforce development linkages between education and industry (6.2 Goals V&X, 7.2A)
- Improve regional infrastructure (broadband, water, sewer, transportation) (5.1 Table 24 GFL-1; 5.2 Table 25 G-1, G-2, G-4; 5.3 Table 26 L-1, L-2; 5.5 Table 28 R-1, R-3, R-4, R-5; 5.6 Table 29 ON-1, ON-3; 5.7 Table 30 OR-1, OR-2, OR-3, OR-5, OR-6, OR-7; 5.8 Table 31 S-1, S-2, S-4; 5.9 Table 32 WA-1, WA-2, WA-3, WA-5, WA-9; 5.10 Table 33 WY-1, WY-3, WY-4, WY-6; 5.10 Table 34 Y-2, Y-3, Y-4, Y-5, Y-7, Y-8, Y-9, Y-10; 6.2 Goal VI; 7.1D:1-6)
- Develop shovel-ready sites within the Region including a New York State Super-Site (5.3 Table 25 G-4, 5.8 Table 31 S-1, S-2, S-3; 6.2 Goals I&II; 7.1E:2)
- Work to attract, retain, and expand businesses within the Region (6.2 Goals I,II&IV; 7.1A:1&2, 7.1B:1-3, 7.1C:1-3, 7.1D:1-6, 7.1E:1-3, 7.1F:1&2, 7.1G:1, 7.1H:1-3)
- View business attraction as a regional benefit rather than a competition (6.2 Goals II&IX; 7.4 A:1&2)
- Target regional clusters and growing industries including: green technology/alternative energy, bio-science, software companies (5.1 Table 24 G-FL-3; 5.2 Table 25 G-6; 5.4 Table 27 M-1; 5.6 Table 29 ON-1, ON-3; 5.9 Table 32 WA-1; 5.10 Table 33 WY-2; 6.2 Goals II&VIII; 7.1C:1-3)
- Work to develop regional innovation clusters (5.1 Table 24 G-FL-3; 6.2 Goals II&VIII; 7.1C:1-3)
- Improve the efficiency of current economic development programs (6.2 Goals I&II; 7.1H:3)
- Expand/promote region revolving loan funds and other incentives programs (6.2 Goals I&II; 7.1A:1, 7.1H:1-3)
- Utilize economic development tools that have been successful in other regions such as PILOTS and TIFS (6.2 Goals I&II; 7.1E:3)
- Support agriculture and the development of agri-business (6.2 Goals III&VIII; 7.1C:1-3)
- Improve tourism and marketing funding to increase promotion efforts and improve the image of the Region (6.2 Goal VII; 7.1J:4)
- Establish a regional vision and regional action plan (1.1; 6.1; 6.2 Goal IX)
- Educate leadership regarding the importance of economic development through local government workshops and county presentations (6.2 Goal X; 7.4A:1&2)
- Encourage business collaboration to increase ability to compete globally (6.2 Goal IX; 7.1A:2)
- Develop regional buy-in to support critical projects (6.2 Goal IX; 7.1B:3)
- Work to develop sales tax sharing to reduce competition and increase thinking regionally (6.2 Goal IX)
- Evaluate economic development measurements on a regional basis (6.2 Goal IX)
- Support small business development through the SCORE model and incentives such as revolving loan funds, tax incentives, and tax abatement (6.2 Goals I, II&IV; 7.1H:1-3)
- Identify successful programs and organizations for funding opportunities (6.2 Goals I, II, IV, VI, VII&IX; 7.1A:1&2, 7.1H:3, 7.1I:1)

