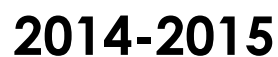


Comprehensive Economic Development Strategy Update



Genesee-Finger Lakes Economic Development District

Draft Comprehensive Economic Development Strategy Update

2014-2015



Prepared by the
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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

GENESEE/FINGER LAKES REGIONAL PLANNING COUNCIL

RESOLUTION

APPROVING THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

WHEREAS,

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

December 10, 2015

Date


Chair

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Introduction

Development of the Comprehensive Economic Development Strategy (CEDS) was made possible through the input and guidance of the Genesee/Finger Lakes Regional Planning Council (G/FLRPC); G/FLRPC Planning Coordination Committee (PCC); G/FLRPC Economic Development Advisory Committee (EDAC); the Regional Development Corporation (RDC); and the Economic Development Administration (EDA). The CEDS outlines additional information about EDA in Chapter 1; and provides an overview of G/FLRPC, the above committees, and RDC in Chapter 2.

The Draft 2014 CEDS was presented at the September 11th, 2014 Regional Planning Council meeting. The Final 2014 CEDS, updated to reflect comments and revisions to the Draft CEDS, was presented and approved at the December 11th, 2014 Regional Planning Council meeting.

Development of the Comprehensive Economic Development Strategy (CEDS) in 2014 began with the acquisition of the most recent demographic, economic, and transportation data. The data helped to guide discussion and input at the three CEDS Stakeholder meetings that were held on July 22nd, 2014 in Canandaigua, NY and Rochester, NY and on July 24th, 2014 in Batavia, NY. The demographic, economic and transportation data is outlined in detail in Chapter 3 of the CEDS and helps to provide an overview of the Region. The presentation from the CEDS stakeholder meeting can be found in Appendix 8 and the notes from the three CEDS Stakeholder meetings can be found in Appendix 9.

Comments and input received at the three stakeholder sessions, along with feedback from the G/FLRPC; PCC; EDAC; and RDC helped to shape the development of the Goals, Objectives, Strategies and Measures, which are outlined in Chapter 6.

Meetings were held in July/August 2014, with each of the counties in the Region, to discuss the identified Goals, Objectives, Strategies, and Measures and to identify the ongoing economic development actions and efforts underway within each County as well as to identify the top economic development priority projects for each County. Follow up discussions were held with each County during August 2015 to revise and update the priority project list for their respective counties. These county narratives and updated priority project tables are outlined in Chapter 5.

Identified current economic development and related programs and activities that are underway within the Region as well as in New York State, are discussed in Chapter 4. One of the major initiatives is the work being done by the Finger Lakes Regional Economic Development Council, which completed a strategic plan entitled “Accelerating our Transformation” in November, 2011. An update to the plan entitled “Accelerating our Transformation: Year 4”, was released in September, 2014. The strategic plan helped to identify some of the regional economic development priority projects which are outlined in Chapter 5.

The input from each of stakeholders in the Region and the feedback from the G/FLRPC; PCC; EDAC; and RDC helped to develop the Plan of Action, which will help guide the G/FLRPC economic development program to help advance the identified goals and objectives. The Plan of Action is outlined in Chapter 7.

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

The 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 grant assistance designed to build upon innovation and regional collaboration to establish a foundation for sustainable job growth and the development of durable regional economies. Available funding focuses on infrastructure development, local capacity building, and business development to help communities alleviate conditions of economic distress.

The mission of 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 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

To facilitate evaluation of applications EDA has also outlined six (6) investment priorities², which include:

1. Collaborative Regional Innovation
2. Public/Private Partnerships
3. National Strategic Priorities
4. Global Competitiveness
5. Environmentally-Sustainable Development
6. Economically Distressed and Underserved Communities

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 increase collaboration amongst Regional economic development stakeholders and to identify and develop emerging industry clusters helping to diversify the local and regional economies.

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

² EDA Investment Priorities: <http://www.eda.gov/about/investment-priorities.htm>

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 the status of projects, programs and regional issues. G/FLRPC's members are listed in Table 1 on the following page.

2014-2015 Comprehensive Economic Development Strategy Update

| Table 1 - Genesee/Finger Lakes Regional Planning Council | | |
|--|---------------------------------------|-------------------|
| Member | Affiliation | Status |
| Raymond Cianfrini | Genesee County | Voting |
| Frank Ferrando Jr. (A) | Genesee County | Voting |
| Robert Bausch | Genesee County | Voting |
| Steve Hyde | Genesee County | Voting |
| <i>Felipe Oltramari</i> | <i>Genesee County</i> | <i>Ex-Officio</i> |
| Eric Gott | Livingston County | Voting |
| Brenda Donohue (A) | Livingston County | Voting |
| William Wadsworth | Livingston County | Voting |
| Bonnie Taylor-Davis | Livingston County | Voting |
| <i>Angela Ellis</i> | <i>Livingston County</i> | <i>Ex-Officio</i> |
| <i>Julie Marshall</i> | <i>Livingston County</i> | <i>Ex-Officio</i> |
| Jeffrey Adair | Monroe County | Voting |
| Maggie Brooks | Monroe County | Voting |
| Robert Colby | Monroe County | Voting |
| Kal Wysokowski | Monroe County | Voting |
| <i>Thomas Goodwin</i> | <i>Monroe County</i> | <i>Ex-Officio</i> |
| <i>Paul Johnson</i> | <i>Monroe County</i> | <i>Ex-Officio</i> |
| Lovely A. Warren | City of Rochester | Voting |
| Zina Lagonegro (A) | City of Rochester | Voting |
| Loretta C. Scott | City of Rochester | Voting |
| Andrea Guzzetta (A) | City of Rochester | Voting |
| Steven V. Rebholz | City of Rochester | Voting |
| <i>Karen Altman</i> | <i>City of Rochester</i> | <i>Ex-Officio</i> |
| John F. Marren | Ontario County | Voting |
| Jeffrey Gallahan (A) | Ontario County | Voting |
| Pamela Helming | Ontario County | Voting |
| Todd Campbell | Ontario County | Voting |
| <i>Thomas Harvey</i> | <i>Ontario County</i> | <i>Ex-Officio</i> |
| <i>Michael Manikowski</i> | <i>Ontario County</i> | <i>Ex-Officio</i> |
| David Callard | Orleans County | Voting |
| Lynn M. Johnson (A) | Orleans County | Voting |
| James Bensley | Orleans County | Voting |
| <i>James Whipple</i> | <i>Orleans County</i> | <i>Ex-Officio</i> |
| Don Earle | Seneca County | Voting |
| William Bordeau (A) | Seneca County | Voting |
| <i>Robert Aronson</i> | <i>Seneca County</i> | <i>Ex-Officio</i> |
| James Hoffman | Wayne County | Voting |
| John Smith | Wayne County | Voting |
| Ken Miller | Wayne County | Voting |
| <i>Margaret Churchill</i> | <i>Wayne County</i> | <i>Ex-Officio</i> |
| <i>Robert McNary</i> | <i>Wayne County</i> | <i>Ex-Officio</i> |
| Douglas Berwanger | Wyoming County | Voting |
| Daniel Lauer (A) | Wyoming County | Voting |
| Jerry Davis | Wyoming County | Voting |
| <i>Arthur Buckley</i> | <i>Wyoming County</i> | <i>Ex-Officio</i> |
| <i>James Pierce</i> | <i>Wyoming County</i> | <i>Ex-Officio</i> |
| Dr. Timothy Dennis | Yates County | Voting |
| Donald House | Yates County | Voting |
| <i>Shawna Bonshak</i> | <i>Yates County</i> | <i>Ex-Officio</i> |
| <i>Steve Griffin</i> | <i>Yates County</i> | <i>Ex-Officio</i> |
| Clyde Forbes | At-Large | Voting |
| Esther Leadley | At-Large | Voting |
| Nathan Rudgers | At-Large | Voting |
| David Woods | At-Large | Voting |
| <i>Richard Perrin</i> | <i>Genesee Transportation Council</i> | <i>Ex-Officio</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 in Canandaigua, NY and Rochester, NY on July 22nd, 2014 and in Batavia, NY on July 24th, 2014. 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, 2014 allowing these groups the opportunity to provide further insight, recommendations and updates to the Comprehensive Economic Development Strategy. Follow up discussions were held with each County and the City of Rochester during August 2015 to revise and update the priority project list for their respective counties or city.

The Draft 2014 Comprehensive Economic Development Strategy was presented at the September 11th, 2014 Regional Planning Council meeting. The CEDS was also discussed at the April 17th, 2014, August 4th, 2014, and August 11th, 2015 Economic Development Advisory Committee (EDAC)/Regional Development Corporation (RDC) meetings to inform EDAC and RDC members about the development/revision of the CEDS and allow for input and feedback regarding the process.

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 |
| Robert Bausch | PO Box 81 Bergen, New York 14416 | Legislator, Genesee County Legislature |
| Brenda Donohue, Treasurer | 6 Court Street Geneseo, NY 14454 | Supervisor, Town of Conesus, Livingston County Board of Supervisors |
| Jeffrey Adair, Chair | 777 Quaker Road Scottsville, NY 14546 | President, Monroe County Legislature |
| John F. Marren, Vice Chair | 85 E. Main St. Victor, NY 14564 | Supervisor, Town of Victor, Ontario County Board of Supervisors |
| William Bordeau | 1 DiPronio Drive Waterloo, NY 13165 | Seneca County Planning and Community Development |
| James Hoffman | 26 Church Street Lyons, NY 14489 | Supervisor, Town of Williamson, Chairman, Wayne County Board of Supervisors |
| Jerry Davis | 7414 Court Road Pavilion, NY 14525 | Supervisor, Town of Covington, Wyoming County Board of Supervisors |
| Donald House | Yates County Legislature Penn Yan, NY 14527 | Legislator, Yates County Legislature |
| Esther Leadley | 11047 River Road Pavilion, NY 14525 | At-Large |
| Angela Ellis | 6 Court Street, Room 305 Geneseo, NY 14454 | Chair, G/FLRPC Planning Coordination Committee |
| James Pierce | 6470 Route 20A Suite 4 Perry, NY 14530 | Chair, G/FLRPC Economic Development Advisory Committee |

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 |
| Steve Hyde, CEO | 99 Med Tech Drive Suite 106 Batavia, NY 14020 | Genesee County Economic Development Center |
| Julie Marshall, Director | 6 Court Street, Room 306 Geneseo, NY 14454 | Livingston County Development Group |
| Paul Johnson, Acting Director | 50 West Main Street Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development |
| Karen Altman, Manager of Business Development | City Hall, Room 005A 30 Church Street Rochester, NY 14614 | City of Rochester Economic Development Department |
| Michael Manikowski, Director | 20 Ontario Street Suite 106B Canandaigua, NY 14424 | Ontario County Office of Economic Development |
| James Whipple CEO/CFO | 121 North Main Street Albion, NY 14411 | Orleans County Economic Development Agency |
| Robert Aronson, Executive Director | 1 DiPronio Drive Waterloo, NY 13165 | Seneca County Industrial Development Agency |
| Margaret Churchill, Executive Director | 16 William Street Lyons, NY 14489 | Wayne County Industrial Development Agency |
| James Pierce, Executive Director, Chair | 6470 Route 20A Suite 4 Perry, NY 14530 | Wyoming County Industrial Development Agency |
| Steve Griffin, Executive Director | 1 Keuka Business Park Penn Yan, NY 14527 | Yates County Industrial Development Agency |
| Vincent Esposito, Finger Lakes Regional Office | 400 Andrews Street, Suite 300 Rochester, NY 14604 | Empire State Development Corporation |

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 the previous page and Table 4 below.

| Table 4 – Rochester/Finger Lakes Regional Development Corporation (RDC) | | |
|--|--|--|
| Member | Address | Affiliation |
| Mary Grace Welch, Lead Economic Developer | 144 Kensington Avenue Buffalo, NY 14214 | National Grid |
| Richard Boerman, Loan Management | 6712 Ann Lee Drive North Rose, NY 14516 | Regional Development Corporation |
| Hubert VanTol, Senior Director for Economic Development | 400 East Avenue Rochester, NY 14607 | PathStone Enterprise Center |
| Joe Rizzo, Director of Economic Development | 89 East Avenue Rochester, NY 14649 | Rochester Gas & Electric Corporation |
| Suzanne Vary, Economic Development Specialist | 20 Ontario Street Suite 106B Canandaigua, NY 14424 | Ontario County Office of Economic Development |
| Joseph Hamm, Regional Administrator | 276 Waring Rd Rochester, NY 14609 | NYS Department of Labor |
| Richard Perrin, Executive Director | 50 W. Main Street., Suite 8112 Rochester, NY 14614 | Genesee Transportation Council |
| Matt Hurlbutt, Managing Director, Business Development | 100 Chestnut Street - One HSBC Plaza Suite 1910 Rochester, NY 14604 | Greater Rochester Enterprise |

2.3.e Planning Coordination Committee

The Planning Coordination Committee (PCC) serves as the general planning advisory committee to G/FLRPC. PCC 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. Current PCC members are listed in Table 5.

| Table 5 - Planning Coordination Committee (PCC) | | |
|--|--|---|
| Member | Address | Affiliation |
| Felipe Oltramari, Director | County Building II 3837 West Main Street Batavia, NY 14020 | Genesee County Department of Planning |
| Angela Ellis, Director | 6 Court Street - Room 305 Geneseo, NY 14454 | Livingston County Planning Department |
| Thomas Goodwin, Planning Manager | 50 West Main Street, Suite 8100 Rochester, NY 14614 | Monroe County Planning & Development |
| Zina Lagonegro, Director of Planning and Zoning | City Hall, Room 010A 30 Church Street Rochester, NY 14614 | City of Rochester Department of Community Development |
| Thomas Harvey, Director | 20 Ontario Street Canandaigua, NY 14424 | Ontario County Planning Department |
| James Bensley, Director | 14016 Route 31 West Albion, NY 14411 | County of Orleans Department of Planning and Development |
| Bill Bordeau, Director | 1 DiPronio Drive Waterloo, NY 13165 | Seneca County Department of Planning & Community Development |
| Robert McNary, Director | 9 Pearl Street Lyons, NY 14489 | Wayne County Planning Department |
| Arthur Buckley, County Planner | 6470 State Route 20A, Suite 4 Perry, NY 14530 | Wyoming County Department of Planning & Development |
| Shawna Bonshak, Planner | 417 Liberty Street Penn Yan, NY 14527 | Yates County Department of Planning |
| Richard Perrin, Executive Director | 50 W. Main Street., Suite 8112 Rochester, NY 14614 | Genesee Transportation Council |

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 |
| Greg Albert | Senior Planner – Economic Development |
| Jayne Breschard-Thomann | Senior Planner |
| Razy Kased | Planner |
| David Zorn | Executive Director |

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.

The Regional Engagement project is an initiative to advance economic development, community development, and planning within the nine-county Finger Lakes Region. The project will profile existing conditions, build on existing plans and strategies and identify opportunities to advance economic development and community development projects through local, state, and federal programs including opportunities available from New York State Department of State.

The project will include an identification of priorities, projects, and action items within each of the nine-counties of the Region; an assessment and profile of existing conditions; opportunities for economic development; and a prioritization of future revitalization efforts. Recommendations for projects and action items will focus on the areas of: brownfields, redevelopment and revitalization efforts, housing, tourism, environmental considerations, natural resources, land use, and infrastructure.

The Genesee-Finger Lakes Region contains three of the top five and five of the top ten agricultural counties in New York State. As such the Region applied for and was awarded an agriculture and related business revolving loan fund. The Region's Growing the Agricultural Industry Now! (GAIN!) Project is an initiative to capitalize agriculture and related businesses that are adopting new technologies, diversifying, or expanding.

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.

The Cleaner, Greener Communities Program was announced by Governor Cuomo in his 2011 State of the State address as a \$96 million competitive grant program to encourage communities to develop regional sustainable growth strategies. The first phase of the program was development of a Regional Sustainability Plan, which established a statewide sustainability planning framework to aid in statewide infrastructure investment decision making; outline actions to reduce greenhouse gas emissions; inform municipal land use policies; and serve as a basis for local government infrastructure decision making. The Genesee-Finger Lakes Region completed the development of a Regional Sustainability Plan under Phase I of the Cleaner, Greener Communities Program, entitled “Finger Lakes Regional Sustainability Plan”, in May 2013.

The second phase of the program made available \$90 million for implementation of specific projects that provide the greatest opportunities for achieving carbon reductions, energy efficiency savings, and renewable energy deployment consistent with region’s sustainability and Regional Economic Development Council Strategic Plans. The first \$30 million was made available in 2013 with the Genesee/Finger Lakes Region receiving approximately \$4.5 million for the following projects: Genesee Biogas; the Green Genesee/Smart Genesee project; Town of Springwater Comprehensive Plan development; City of Rochester Comprehensive Plan revision; the I-square mixed-use development in Irondequoit; Town of Brighton Comprehensive Plan revision; City of Geneva Comprehensive Plan update; and the Village of Waterloo Comprehensive Plan development.

The second \$30 million was made available in 2014 with the Genesee/Finger Lakes Region receiving approximately \$3.5 million for the following projects: City of Batavia Sustainable Batavia Project; Town of Mt. Morris Comprehensive Plan and Zoning Updates; City of Rochester Sustainable Planning and Design Practices Guidance; Friends of the GardenAerial Inc. Downtown High Falls Rochester EcoDistrict; Webster Cold Water Project; and the Rochester Sibley Tower Redevelopment.

The Transportation and Food Systems in the Genesee-Finger Lakes Region project will identify and interview a diverse sampling of stakeholders involved with local/regional food production, processing, storage/warehousing, distribution, large consumption, food hubs, and post-consumption (food waste to energy) in the nine-county Genesee-Finger Lakes Region. This comprehensive inventory will inform future efforts and build links between local food producers and consumers.

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 communities within the Region. The draft Ontario County

All Hazard Plan Update was developed in 2014-2015 with the final update being finalized, based on review and revision, in 2016.

G/FLRPC also is actively working with the National Flood Insurance Program's (NFIP) Community Rating System (CRS) to potentially assist communities in reducing the damage, disruption, and public and private costs that result from flood problems. CRS is a voluntary incentive program that recognizes communities for enforcing floodplain management activities that exceed the minimum NFIP requirements. There are many benefits to enhanced floodplain management such as improved public safety, property loss reduction, open space and natural resource protection, and better post-disaster recovery. A discount of up to 45% off flood insurance premiums is also available to policyholders in participating communities.

Any community that is in full compliance with the NFIP may apply to join the CRS. CRS credit points are earned for a wide range of floodplain management activities, which are organized under four categories: (1) Public Information Activities, (2) Mapping and Regulations, (3) Flood Damage Reduction Activities, and (4) Warning and Response. Communities apply for a CRS classification and are awarded credit points that reflect the impact of these activities.

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 activities 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 surveying. 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 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; county water quality coordinating committee participation and assistance; green infrastructure planning; stormwater and floodplain management planning; watershed management planning; blueway trails; and assistance with the implementation of state and federal regulations. Current projects include general water resources planning; green infrastructure planning; flood smart communities; and involvement with the development of watershed management plans. Recently completed projects include the; *Black Creek Watershed Management Plan*; *Oatka Creek Watershed Management Plan*; and the *Seneca Lake Watershed Management Plan*.

Green Infrastructure Design Guidelines will assist in the reduction of sources and loads of critical pollutants that are found in stormwater runoff, such as sediment, toxic chemicals, and road salts, to New York State waters with user-friendly design guidelines for green infrastructure practices and techniques. G/FLRPC will create a set of design guidelines and standards that are easy to use and simple to read. The document will benefit members of planning boards and zoning boards of appeals in Monroe County during the planning review process of green infrastructure projects.

Flood Smart Communities will work with the Village of Hilton, the Town of Greece and the Town of Parma to reduce their vulnerability to flooding. The Nature Conservancy (TNC) and G/FLRPC will engage local government decision makers and members of the community in an assessment of current flooding vulnerability and development of actions they can take to reduce vulnerability. This approach will produce a proactive plan that will enable local government and community members to put their resources into preventing flood damage rather than costly reactive repairs.

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.

2.3.g.iii Data, Technology and Resource Center

Geographic Information System 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.

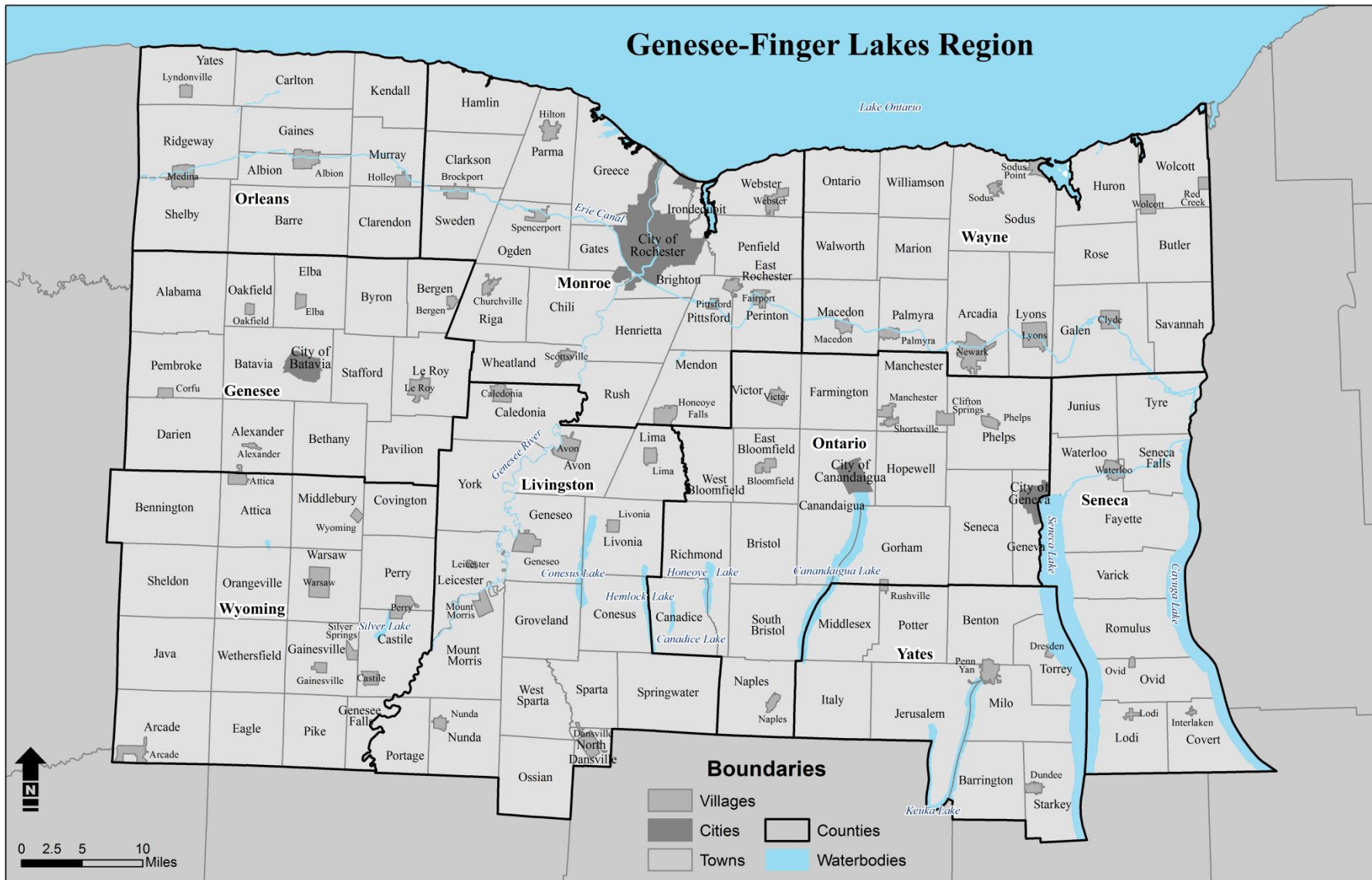
The annual Land Use Monitoring report provides information on the issuance of building permits to identify areas of growth within the Genesee-Finger Lakes Region that might require transportation planning and service modifications. The report analyzes the number of permits issued, total square footage, and total value of buildings for each municipality within the region as well as the Transportation Management Area (TMA). The TMA covers Monroe County and the municipalities adjacent to Monroe County in Livingston, Ontario, and Wayne Counties, as well as the Town and City of Canandaigua. The analysis looks at the following categories and respective subcategories: “residential” (single-family, two-family, three or four-family, five-or-more family, mobile/manufactured homes); “industrial;” “commercial” (offices/banks, retail/service, service stations, hotels/motels); “community service” (hospitals/health facilities, schools/churches, public works/safety, utilities); and “not elsewhere classified.”

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 15.1%, compared to 14.0% in the state and 13.7% in the nation, as illustrated by Table 9, *Age Distribution for the G-FL Region, New York State and the U.S. 2011-2013*. Every county in the Region had a larger percentage of its population over the age of 65 than the national total of 13.7%.

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 2012 was 24.2%,

lower than New York State with 27.1% and the nation with 26.5% although Wyoming County does exceed the state and nation in percentage of persons in the 25-44 age cohort with 27.2% of its population between the ages of 25 and 44.

Table 9 - Age Distribution for the G-FL Region, New York State and the U.S. 2011-2013 (ACS Estimate)

| | Under 18 | 18 to 24 | 25 to 44 | 45 to 64 | 65 and over |
|--------------------|-------------|-------------|-------------|-------------|-------------|
| Genesee | 21.4 | 9.2 | 23.4 | 29.6 | 16.6 |
| Livingston | 19.3 | 15.4 | 21.2 | 29.2 | 15.0 |
| Monroe | 21.9 | 11.2 | 24.9 | 27.6 | 14.6 |
| Ontario | 21.6 | 9.4 | 22.2 | 30.2 | 16.5 |
| Orleans | 20.9 | 9.6 | 24.1 | 30.4 | 15.2 |
| Seneca | 20.1 | 8.6 | 25.5 | 29.3 | 16.5 |
| Wayne | 22.9 | 8.1 | 22.5 | 31.2 | 15.4 |
| Wyoming | 19.6 | 8.3 | 27.2 | 30.4 | 14.7 |
| Yates | 23.4 | 11.2 | 19.6 | 28.5 | 17.3 |
| G-FL Region | 21.7 | 10.7 | 24.2 | 28.6 | 15.1 |
| New York State | 21.8 | 10.2 | 27.1 | 26.8 | 14.0 |
| United States | 23.5 | 10.0 | 26.5 | 26.4 | 13.7 |

Source: U.S. Census Bureau American Community Survey 2011-2013

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 (2011-2013) show that, in the G-FL Region, 89.7% of the population over the age of 25 had a high school diploma or higher. This is compared to 85.3% in New York State and 86.2% nationally, as illustrated by *Table 10, Educational Attainment Rates for the G-FL Region, New York State and the U.S. 2011-2013*.

Table 10 - Educational Attainment Rates for the G-FL Region, New York State and the U.S. 2011-2013 (ACS Estimate)

| | Less than HS | HS Graduate | Some college | Associates Degree | Bachelor's degree | Graduate degree or higher |
|--------------------|--------------|-------------|--------------|-------------------|-------------------|---------------------------|
| Genesee | 9.9 | 37.3 | 18.8 | 14.2 | 12.2 | 7.5 |
| Livingston | 11.2 | 33.3 | 18.3 | 13.1 | 14.0 | 10.1 |
| Monroe | 9.9 | 25.1 | 17.4 | 11.8 | 20.0 | 15.8 |
| Ontario | 8.3 | 28.8 | 18.7 | 13.6 | 17.1 | 13.4 |
| Orleans | 14.2 | 40.6 | 19.2 | 10.5 | 9.9 | 5.5 |
| Seneca | 15.3 | 33.9 | 17.8 | 12.4 | 11.7 | 8.9 |
| Wayne | 9.9 | 37.6 | 18.8 | 13.3 | 12.8 | 7.5 |
| Wyoming | 13.2 | 40.2 | 19.5 | 12.4 | 9.1 | 5.7 |
| Yates | 13.6 | 34.4 | 18.3 | 9.9 | 11.2 | 12.6 |
| G-FL Region | 10.3 | 29.0 | 17.9 | 12.2 | 17.3 | 13.2 |
| New York State | 14.7 | 27.0 | 16.3 | 8.5 | 19.0 | 14.5 |
| United States | 13.7 | 28.0 | 21.2 | 7.9 | 18.2 | 10.9 |

Source: U.S. Census Bureau American Community Survey 2011-2013

Additionally, 30.5% of people in the G-FL Region have a Bachelor's degree or higher. This is higher than the national total of 29.2%, but lower than New York State with 33.5%.

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 2011-2013, 12.2% of those over the age of 25 in the G-FL Region had an Associate's degree, which was greater than percentages with Associates degrees from New York State (8.5%) and the U.S. (7.9%).

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.³ The per capita income in the G-FL Region increased by \$5,875 in constant dollars, or 15.2%, between 2003 and 2013, 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 (2003-2013) | |
| | 2003* | 2013 | By Dollars | By Percent |
| Genesee | 34,288 | 37,465 | 3,177 | 9.3% |
| Livingston | 32,189 | 36,117 | 3,928 | 12.2% |
| Monroe | 42,088 | 48,162 | 6,074 | 14.4% |
| Ontario | 38,619 | 46,723 | 8,104 | 21.0% |
| Orleans | 28,755 | 33,473 | 4,718 | 16.4% |
| Seneca | 31,043 | 36,606 | 5,563 | 17.9% |
| Wayne | 34,919 | 39,372 | 4,453 | 12.8% |
| Wyoming | 29,855 | 34,849 | 4,994 | 16.7% |
| Yates | 27,669 | 35,997 | 8,328 | 30.1% |
| G-FL Region | 38,783 | 44,658 | 5,875 | 15.2% |
| New York State | 46,905 | 54,462 | 7,557 | 16.1% |
| United States | 41,371 | 44,765 | 3,394 | 8.2% |
| Source: U.S. Bureau of Economic Analysis | | | | |
| * 2002 dollars are adjusted for inflation and are expressed in 2013 dollars | | | | |

The per capita income in the G-FL Region is less than in both New York State and the United States. The per capita income, within the Region, did however grow at a higher rate than the 8.2% growth of the U.S. per capita income between 2003 and 2013, though it did not outpace New York State, which had a growth rate of 16.1% 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. U.S. Census American Community Survey three-year estimates (2011-2013) show that, in the G-FL Region the total population living in poverty is 14.5% and the total population under the age of 18 living in poverty is 21.3%, as illustrated in Table 12, *Poverty Status for the G-FL Region, New York State and the U.S. 2011-2013*. The percent of people living in poverty in the G-FL Region is less than both New York State and the U.S., which each have an estimated 15.9% of their total populations living in poverty.

³ US Census Bureau: American Community Survey 2004 Subject Definitions.

U.S. Census American Community Survey three-year estimates (2011-2013) also show that, in the G-FL Region the total population under the age of 18 living in poverty is 21.3%. The percentage of those under the age of 18 living in poverty within the Region is lower than both New York State and the United States, which have 22.7% and 22.4% of their populations under the age of 18 living in poverty, respectively.

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; 68.7% of homes in the G-FL Region were owner occupied. This is compared to 53.9% in New York State and 64.7% nationally. In addition, each county in the G-FL Region has a higher percentage of owner-occupied housing units than both New York State and the United States as illustrated by Table 13, *Percentage Owner Occupied Housing Units 2010-2012*.

Table 12 - Poverty Status for the G-FL Region, New York State and the U.S. 2011-2013 (ACS Estimate)

| | Population living in poverty | Population under 18 living in poverty |
|---------------|-------------------------------------|--|
| Genesee | 13.6 | 20.2 |
| Livingston | 14.8 | 17.3 |
| Monroe | 15.8 | 23.8 |
| Ontario | 10.6 | 13.4 |
| Orleans | 16.0 | 24.2 |
| Seneca | 11.8 | 13.2 |
| Wayne | 11.4 | 17.5 |
| Wyoming | 10.9 | 14.5 |
| Yates | 16.3 | 25.7 |
| G-FL Region | 14.5 | 21.3 |
| New York | 15.9 | 22.7 |
| United States | 15.9 | 22.4 |

Source: U.S. Census Bureau

Table 13 – Percentage Owner Occupied Housing Units 2010-2012 (ACS Estimate)

| | By Percent |
|--------------------|-------------------|
| Genesee | 73.3% |
| Livingston | 75.0% |
| Monroe | 64.8% |
| Ontario | 73.0% |
| Orleans | 77.7% |
| Seneca | 73.4% |
| Wayne | 77.7% |
| Wyoming | 74.9% |
| Yates | 79.3% |
| G-FL Region | 68.7% |
| New York State | 53.9% |
| United States | 64.7% |

Source: U.S. Census Bureau

Table 14 - Median Home Values and Median Gross Rents 2011-2013 (ACS Estimate)

| | Median Home Value | Median Gross Rent |
|----------------|--------------------------|--------------------------|
| Genesee | 102,200 | 704 |
| Livingston | 123,100 | 689 |
| Monroe | 137,600 | 811 |
| Ontario | 140,300 | 784 |
| Orleans | 89,500 | 637 |
| Seneca | 97,600 | 678 |
| Wayne | 110,000 | 677 |
| Wyoming | 101,200 | 578 |
| Yates | 120,500 | 642 |
| New York State | 281,000 | 1,096 |
| United States | 173,200 | 900 |

Source: U.S. Census Bureau

Furthermore, the American Community Survey three-year estimate median value home price for each county in the Region for 2011-2013 was substantially less than the state median home value of \$281,000 and the national median home value of \$173,200,

as illustrated by Table 14, *Median Home Values and Median Gross Rents 2011-2013*. In addition, each of the counties' median gross rent was less than both the state median gross rent of \$1,096 and the national median gross rent of \$900.

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 Health Care and Social Assistance sector, which added over 10,280 jobs between 2004 and 2014. Additionally, the decline of employment in the manufacturing sector has continued throughout the Region losing over 21,850 jobs between 2004 and 2014.

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 2004 and 2014.

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. It should be noted that even if the data at the county level is suppressed for confidentiality purposes it is still included within the Regional totals for each table. A list of major sectors and the sub-sectors 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 2004-2014 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 comparisons of data prior to 2000 challenging.

Although the 2004-2014 time period is short, it includes the 2008 economic recession as well as the series of years before and after, helping to place into context the economic conditions of the Region, State, and Nation during this time period.

The agricultural economic data were collected from the 2012 United States Census of Agriculture. The data includes the number of farms; and acres of farmland; and cash receipts for crops, livestock and all products for the year 2012. 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 2014 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 (2014)*.

| Table 15 - Employment in the G-FL Region by Major Sector (2014) | | | | | |
|--|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Agriculture, Forestry, Fishing & Hunting | 901 | 580 | 557 | 638 | 979 |
| Mining | 66 | - | 95 | 63 | 42 |
| Utilities | 97 | - | - | - | 24 |
| Construction | 943 | 969 | 12,786 | 2,655 | 314 |
| Manufacturing | 3,042 | 2,024 | 40,867 | 6,682 | 2,180 |
| Wholesale Trade | 981 | 553 | 12,840 | 1,541 | 97 |
| Retail Trade | 2,655 | 2,511 | 38,425 | 8,786 | 1,072 |
| Transportation and Warehousing | 520 | 191 | 6,499 | 1,165 | 183 |
| Information | 171 | 215 | 7,302 | 775 | 88 |
| Finance and Insurance | 370 | 369 | 11,247 | 1,347 | - |
| Real Estate and Rental and Leasing | 164 | 129 | 5,962 | 370 | 68 |
| Professional and Technical Services | 359 | 291 | 23,284 | 1,448 | 108 |
| Management of Companies and Enterprises | 99 | 62 | 10,769 | 519 | - |
| Administrative and Waste Services | 787 | 445 | 22,792 | 1,333 | 329 |
| Educational Services | 158 | 33 | 24,924 | 952 | - |
| Health Care and Social Assistance | 2,606 | 1,988 | 62,441 | 6,880 | 1,281 |
| Arts, Entertainment, and Recreation | 882 | 141 | 4,997 | 1,237 | 85 |
| Accommodation and Food Services | 2,030 | 2,080 | 27,285 | 5,431 | 705 |
| Other Services | 832 | 738 | 14,131 | 1,677 | 288 |
| Unclassified | 21 | 23 | 575 | 70 | 24 |
| Total, All Government | 5,728 | 6,022 | 46,740 | 8,704 | 3,906 |
| Total, All Private | 23,410 | 13,677 | 328,697 | 43,731 | 8,691 |
| Total, All Industries | 17,682 | 19,699 | 375,437 | 52,435 | 12,597 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

Table 15 - Employment in the G-FL Region by Major Sector (2014) (continued)

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|--------|--------|---------|-------|-------------|
| Agriculture, Forestry, Fishing & Hunting | 129 | 1,803 | 994 | 227 | 6,809 |
| Mining | - | 87 | - | - | 685 |
| Utilities | - | - | 20 | - | 1,770 |
| Construction | 209 | 1,316 | 378 | 308 | 19,877 |
| Manufacturing | 2,168 | 5,755 | 1,724 | 1,022 | 65,463 |
| Wholesale Trade | 268 | 672 | 189 | 94 | 17,235 |
| Retail Trade | 2,148 | 3,096 | 1,546 | 721 | 60,959 |
| Transportation and Warehousing | 115 | 191 | 480 | 150 | 9,493 |
| Information | 27 | 182 | 78 | 37 | 8,873 |
| Finance and Insurance | 174 | 475 | 187 | 107 | 14,983 |
| Real Estate and Rental and Leasing | 99 | 170 | 146 | 109 | 7,217 |
| Professional and Technical Services | 179 | 429 | 239 | 112 | 26,448 |
| Management of Companies and Enterprises | 113 | 179 | - | - | 11,907 |
| Administrative and Waste Services | 243 | 811 | 1,356 | 86 | 28,182 |
| Educational Services | - | 50 | - | - | 27,215 |
| Health Care and Social Assistance | 886 | 2,850 | 747 | 1,104 | 80,782 |
| Arts, Entertainment, and Recreation | 75 | 206 | 222 | 59 | 7,903 |
| Accommodation and Food Services | 931 | 1,750 | 742 | 557 | 41,510 |
| Other Services | 230 | 634 | 531 | 301 | 19,361 |
| Unclassified | 27 | 48 | 15 | 25 | 827 |
| Total, All Government | 2,884 | 7,237 | 4,176 | 1,278 | 86,673 |
| Total, All Private | 8,309 | 21,226 | 9,736 | 5,750 | 457,500 |
| Total, All Industries | 11,193 | 28,463 | 13,912 | 7,028 | 544,173 |

Source: Quarterly Census of Employment and Wages

In 2014, there were 86,673 workers in the G-FL Region employed within the government sector, with most employed by public school districts, the highest of any employment category. The only counties in the Region where Government is not the largest sector of employment are Monroe County and Ontario County. A total of 15.9% 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 80,782 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 65,463 workers, accounting for 12.0% of regional employment and 14.3% of regional private employment.

Retail Trade employed 60,959 people and was the fourth largest sector of employment in the Region. While the number of people employed in Retail Trade is large it can 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 within the Genesee Finger Lakes Region can likely be attributed to an export industry.

The employment changes from 2004 to 2014 are shown in Table 16, *Change in Employment by Major Sector in the G-FL Region (2004-2014)*.

Table 16 -Change in Employment by Major Sector in the G-FL Region (2004-2014)

| | 2004 | 2014 | Change | % Change |
|--|---------|---------|---------|----------|
| Agriculture, Forestry, Fishing & Hunting | 5,884 | 6,809 | 925 | 15.7% |
| Mining | 629 | 685 | 56 | 8.9% |
| Utilities | 2,145 | 1,770 | -375 | -17.5% |
| Construction | 18,898 | 19,877 | 979 | 5.2% |
| Manufacturing | 87,315 | 65,463 | -21,852 | -25.0% |
| Wholesale Trade | 17,973 | 17,235 | -738 | -4.1% |
| Retail Trade | 63,114 | 60,959 | -2,155 | -3.4% |
| Transportation and Warehousing | 9,106 | 9,493 | 387 | 4.2% |
| Information | 12,408 | 8,873 | -3,535 | -28.5% |
| Finance and Insurance | 15,484 | 14,983 | -501 | -3.2% |
| Real Estate and Rental and Leasing | 7,587 | 7,217 | -370 | -4.9% |
| Professional and Technical Services | 23,554 | 26,448 | 2,894 | 12.3% |
| Management of Companies and Enterprises | 10,632 | 11,907 | 1,275 | 12.0% |
| Administrative and Waste Services | 23,864 | 28,182 | 4,318 | 18.1% |
| Educational Services | 22,300 | 27,215 | 4,915 | 22.0% |
| Health Care and Social Assistance | 70,502 | 80,782 | 10,280 | 14.6% |
| Arts, Entertainment, and Recreation | 8,101 | 7,903 | -198 | -2.4% |
| Accommodation and Food Services | 35,467 | 41,510 | 6,043 | 17.0% |
| Other Services | 18,204 | 19,361 | 1,157 | 6.4% |
| Unclassified | 896 | 827 | -69 | -7.7% |
| Total, All Government | 89,980 | 86,673 | -3,307 | -3.7% |
| Total, All Private | 454,060 | 457,500 | 3,440 | 0.8% |
| Total, All Industries | 544,040 | 544,173 | 133 | 0.0% |

Source: Quarterly Census of Employment and Wages

There was a loss of 21,852 manufacturing jobs in the ten year period from 2004 to 2014 for a decrease of 25.0%. Public sector employment declined by 3,307 jobs during this period while private sector employment increased by 3,440, resulting in a net gain of 133 jobs within the Region during this period.

The largest net increase between 2002 and 2012 was in Health Care and Social Assistance with a gain of 20,280 jobs. In addition Accommodation and Food Services gained 6,043 jobs during this period. Educational Services gained 4,915 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 Administrative and Waste Services; Professional and Technical Services; Management of Companies and Enterprises; Other Services; Construction; Agriculture, Forestry, Fishing & Hunting; Transportation and Warehousing; and Mining.

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 (2014)*, 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 (2014)

| | Genesee | Livingston | Monroe | Ontario | Orleans |
|--|----------------|-------------------|---------------|----------------|----------------|
| Agriculture, Forestry, Fishing & Hunting | 61 | 56 | 50 | 56 | 57 |
| Mining | 8 | - | 8 | 7 | 4 |
| Utilities | 5 | - | - | - | 3 |
| Construction | 162 | 138 | 1,502 | 287 | 84 |
| Manufacturing | 87 | 66 | 904 | 162 | 38 |
| Wholesale Trade | 94 | 59 | 1,043 | 165 | 17 |
| Retail Trade | 205 | 198 | 2,266 | 515 | 96 |
| Transportation and Warehousing | 40 | 22 | 316 | 52 | 28 |
| Information | 13 | 16 | 226 | 41 | 7 |
| Finance and Insurance | 54 | 55 | 1,018 | 117 | - |
| Real Estate and Rental and Leasing | 31 | 37 | 826 | 87 | 18 |
| Professional and Technical Services | 75 | 89 | 2,092 | 229 | 38 |
| Management of Companies and Enterprises | 8 | 4 | 141 | 11 | - |
| Administrative and Waste Services | 63 | 58 | 1,106 | 168 | 20 |
| Educational Services | 13 | 7 | 293 | 26 | - |
| Health Care and Social Assistance | 125 | 134 | 1,771 | 273 | 74 |
| Arts, Entertainment, and Recreation | 25 | 27 | 275 | 72 | 18 |
| Accommodation and Food Services | 129 | 141 | 1,561 | 290 | 53 |
| Other Services | 148 | 144 | 1,803 | 299 | 72 |
| Unclassified | 34 | 39 | 714 | 107 | 31 |
| Total, All Government | 98 | 138 | 379 | 149 | 77 |
| Total, All Private | 1,476 | 1,298 | 17,933 | 2,968 | 687 |
| Total, All Industries | 1,378 | 1,436 | 18,312 | 3,117 | 764 |

Source: Quarterly Census of Employment and Wages

Table 17 - Number of Firms in the G-FL Region by Major Sector (2014) (continued)

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|---------------|--------------|----------------|--------------|--------------------|
| Agriculture, Forestry, Fishing & Hunting | 19 | 118 | 64 | 33 | 513 |
| Mining | - | 7 | - | - | 41 |
| Utilities | - | - | 3 | - | 47 |
| Construction | 54 | 269 | 90 | 78 | 2,662 |
| Manufacturing | 50 | 139 | 44 | 45 | 1,534 |
| Wholesale Trade | 26 | 81 | 23 | 18 | 1,526 |
| Retail Trade | 173 | 260 | 130 | 91 | 3,934 |
| Transportation and Warehousing | 14 | 39 | 32 | 17 | 561 |
| Information | 6 | 25 | 12 | 7 | 352 |
| Finance and Insurance | 28 | 66 | 35 | 16 | 1,416 |
| Real Estate and Rental and Leasing | 21 | 56 | 19 | 21 | 1,115 |
| Professional and Technical Services | 33 | 101 | 44 | 26 | 2,728 |
| Management of Companies and Enterprises | 3 | 7 | - | - | 178 |
| Administrative and Waste Services | 33 | 116 | 35 | 22 | 1,620 |
| Educational Services | - | 11 | - | - | 366 |
| Health Care and Social Assistance | 61 | 142 | 59 | 56 | 2,694 |
| Arts, Entertainment, and Recreation | 9 | 39 | 25 | 11 | 501 |
| Accommodation and Food Services | 74 | 158 | 66 | 63 | 2,534 |
| Other Services | 57 | 186 | 101 | 62 | 2,871 |
| Unclassified | 19 | 73 | 32 | 15 | 1,063 |
| Total, All Government | 77 | 157 | 83 | 57 | 1,212 |
| Total, All Private | 688 | 1,895 | 818 | 587 | 28,252 |
| Total, All Industries | 765 | 2,052 | 901 | 644 | 29,464 |

Source: Quarterly Census of Employment and Wages

In 2014, there were 29,464 establishments in the G-FL Region, 28,252 of which were private sector firms. In the 2004 to 2014 time period, there was an increase in the number of establishments in the Region by 1,423, a 5.1% increase.

The three major sectors with the largest number of establishments were Retail Trade, Other Services, and Professional, Scientific, and Technical Services. 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 2014 was \$45,105. This constitutes a decline of \$321 from the 2004 average annual wage of \$45,426 when adjusted for inflation and expressed in 2014 dollars, as shown in Table 18, *Average Annual Wage for the G-FL Region (2014)*.

During these period the average wage for the government sector increased by \$291, while the average wage for the private sector declined by \$421 when adjusted for inflation and expressed in 2014 dollars.

The highest average annual wages by major sector in 2014 were: Utilities \$102,703; Management of Companies and Enterprises (\$94,409); Finance and Insurance (\$72,990); and Wholesale Trade (\$67,612).

| Table 18 - Average Annual Wage for the G-FL Region (2014) | | | | | |
|--|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Agriculture, Forestry, Fishing & Hunting | \$35,602 | \$34,676 | \$24,115 | \$31,602 | \$30,310 |
| Mining | \$52,662 | - | \$51,526 | \$50,445 | \$46,834 |
| Utilities | \$103,445 | - | - | - | \$123,333 |
| Construction | \$45,837 | \$53,796 | \$54,439 | \$53,596 | \$42,324 |
| Manufacturing | \$51,835 | \$47,678 | \$66,212 | \$54,972 | \$48,839 |
| Wholesale Trade | \$49,954 | \$44,689 | \$70,073 | \$82,897 | \$46,045 |
| Retail Trade | \$24,535 | \$23,788 | \$26,183 | \$26,402 | \$23,350 |
| Transportation and Warehousing | \$37,723 | \$36,981 | \$36,233 | \$40,670 | \$31,659 |
| Information | \$44,160 | \$22,223 | \$68,283 | \$48,110 | \$15,059 |
| Finance and Insurance | \$57,357 | \$29,261 | \$81,896 | \$53,693 | -- |
| Real Estate and Rental and Leasing | \$25,486 | \$32,898 | \$39,142 | \$30,818 | \$24,407 |
| Professional and Technical Services | \$41,155 | \$35,936 | \$65,891 | \$62,113 | \$33,178 |
| Management of Companies and Enterprises | \$54,887 | \$44,725 | \$84,525 | \$342,223 | - |
| Administrative and Waste Services | \$43,711 | \$43,531 | \$35,611 | \$32,709 | \$28,007 |
| Educational Services | \$17,456 | \$17,440 | \$57,170 | \$51,044 | - |
| Health Care and Social Assistance | \$34,716 | \$33,602 | \$41,831 | \$40,062 | \$31,982 |
| Arts, Entertainment, and Recreation | \$15,445 | \$12,971 | \$19,959 | \$19,899 | \$14,254 |
| Accommodation and Food Services | \$14,103 | \$14,042 | \$15,987 | \$16,852 | \$13,286 |
| Other Services | \$21,572 | \$25,402 | \$26,542 | \$23,355 | \$21,493 |
| Unclassified | \$30,229 | \$21,323 | \$28,694 | \$31,261 | \$19,271 |
| Total, All Government | \$42,744 | \$41,430 | \$49,603 | \$45,952 | \$50,735 |
| Total, All Private | \$37,023 | \$33,286 | \$47,207 | \$42,767 | \$33,492 |
| Total, All Industries | \$35,170 | \$35,775 | \$47,505 | \$43,296 | \$38,839 |
| <i>Source: Quarterly Census of Employment and Wages</i> | | | | | |

Table 18 - Average Annual Wage for the G-FL Region (2014) (continued)

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|----------|----------|----------|----------|-------------|
| Agriculture, Forestry, Fishing & Hunting | \$25,427 | \$29,414 | \$34,301 | \$21,605 | \$30,955 |
| Mining | - | \$55,416 | - | - | \$60,998 |
| Utilities | - | - | \$79,794 | - | \$102,703 |
| Construction | \$48,817 | \$43,320 | \$35,127 | \$33,402 | \$52,210 |
| Manufacturing | \$83,209 | \$47,929 | \$44,016 | \$39,622 | \$61,202 |
| Wholesale Trade | \$42,693 | \$52,943 | \$48,046 | \$37,570 | \$67,612 |
| Retail Trade | \$21,556 | \$25,139 | \$27,218 | \$27,536 | \$25,821 |
| Transportation and Warehousing | \$25,156 | \$38,825 | \$34,195 | \$38,771 | \$36,645 |
| Information | \$16,292 | \$22,886 | \$25,231 | \$27,106 | \$62,788 |
| Finance and Insurance | \$41,958 | \$48,242 | \$51,207 | \$45,190 | \$72,990 |
| Real Estate and Rental and Leasing | \$36,744 | \$27,980 | \$31,858 | \$23,713 | \$37,478 |
| Professional and Technical Services | \$33,589 | \$52,805 | \$35,145 | \$48,255 | \$64,104 |
| Management of Companies and Enterprises | \$88,576 | \$55,130 | - | - | \$94,409 |
| Administrative and Waste Services | \$45,150 | \$37,636 | \$44,174 | \$25,194 | \$36,257 |
| Educational Services | - | \$10,686 | - | - | \$55,547 |
| Health Care and Social Assistance | \$29,593 | \$32,407 | \$36,843 | \$32,730 | \$40,456 |
| Arts, Entertainment, and Recreation | \$21,192 | \$14,950 | \$15,229 | \$19,464 | \$19,007 |
| Accommodation and Food Services | \$14,960 | \$12,725 | \$12,753 | \$16,276 | \$15,651 |
| Other Services | \$17,241 | \$22,687 | \$19,584 | \$23,796 | \$25,465 |
| Unclassified | \$24,136 | \$28,411 | \$22,236 | \$12,518 | \$27,735 |
| Total, All Government | \$50,698 | \$41,561 | \$51,165 | \$38,531 | \$47,545 |
| Total, All Private | \$42,270 | \$38,024 | \$34,466 | \$30,427 | \$44,643 |
| Total, All Industries | \$44,442 | \$38,923 | \$39,478 | \$31,901 | \$45,105 |

Source: Quarterly Census of Employment and Wages

The major sectors with the lowest average wages in 2014 were Accommodation and Food Services (\$15,651); Arts, Entertainment and Recreation (\$19,007); and Other Services (\$25,465). 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 2004 and 2014 by \$718 when adjusted for inflation and expressed in 2014 dollars.

3.4.e Unemployment

In 2014, the unemployment rate for the G-FL Region was 5.8% which constitutes a decrease of 1.3% from 2013. This is illustrated in Table 19, *Unemployment Rate for the G-FL Region, New York State and the U.S. (2012-2014)*.

The Region's unemployment rate was lower than both the New York State and national unemployment rates for 2014. The unemployment rate for all three geographies seems has declined between 2013 and 2014. In New York State unemployment declined from 7.7% in 2013 to 6.3% in 2014 and in the United States unemployment declined from 7.4% in 2013 to 6.2% in 2014. Within the Genesee-Finger Lakes Region unemployment declined from 7.1% in 2013 to 5.8% in 2014.

Table 19 - Unemployment Rate for the G-FL Region, New York State and the U.S. (2012-2014)

| | 2012 | 2013 | 2014 |
|--------------------|-------|------|------|
| Genesee | 7.7% | 6.7% | 5.5% |
| Livingston | 8.2% | 7.4% | 5.8% |
| Monroe | 7.8% | 7.0% | 5.8% |
| Ontario | 7.4% | 6.6% | 5.3% |
| Orleans | 10.2% | 9.0% | 7.6% |
| Seneca | 7.8% | 6.9% | 5.7% |
| Wayne | 8.5% | 7.5% | 6.2% |
| Wyoming | 8.6% | 7.8% | 6.5% |
| Yates | 7.1% | 6.1% | 5.6% |
| G-FL Region | 7.9% | 7.1% | 5.8% |
| New York State | 8.5% | 7.7% | 6.3% |
| United States | 8.1% | 7.4% | 6.2% |

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 (2012)*.

There were 6,114 farms in the G-FL Region in 2010, constituting a total of 1,470,769 acres of farmland. In 2012, the agricultural industry in the G-FL Region yielded \$1,605,046,000 in cash receipts for all products. In total, 29.6% of the state's cash receipts from all agricultural products came from the G-FL Region. Specifically, 35.0% of the state's cash receipts in crops and 25.9% 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 2002 and 2012, there was a net loss of 241 farms within the Region, though the Region did add 14,169 acres of farmland.

Table 20 - Agricultural Economic Statistics for the G-FL Region and New York State (2012)

| | Number of Farms | Farmland (Acres) | Cash Receipts | | |
|------------------|-----------------|------------------|-----------------|-----------------|-----------------|
| | | | Crops | Livestock | All Products |
| Genesee | 549 | 187,317 | \$85,189,000 | \$151,763,000 | \$236,952,000 |
| Livingston | 661 | 194,945 | \$80,742,000 | \$106,067,000 | \$186,809,000 |
| Monroe | 475 | 98,676 | \$81,342,000 | \$9,238,000 | \$90,580,000 |
| Ontario | 853 | 192,616 | \$77,235,000 | \$103,091,000 | \$180,326,000 |
| Orleans | 487 | 135,090 | \$138,467,000 | \$11,856,000 | \$150,323,000 |
| Seneca | 584 | 130,206 | \$52,506,000 | \$66,420,000 | \$118,926,000 |
| Wayne | 873 | 179,109 | \$149,398,000 | \$56,207,000 | \$205,605,000 |
| Wyoming | 713 | 225,864 | \$77,920,000 | \$240,584,000 | \$318,504,000 |
| Yates | 919 | 126,946 | \$43,971,000 | \$73,050,000 | \$117,021,000 |
| G-FL Region | 6,114 | 1,470,769 | 786,770,000 | \$818,276,000 | \$1,605,046,000 |
| New York State | 35,537 | 7,183,576 | \$2,249,227,000 | \$3,165,898,000 | \$5,415,125,000 |
| % New York State | 17.2% | 20.5% | 35.0% | 25.9% | 29.6% |

Source: 2012 United States Census of Agriculture

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. (2012) | | | | | |
|---|-------------------------|----------------------------------|--------------------------------------|--|--|
| | Innovation Index | Human Capital⁴ | Economic Dynamics⁵ | Productivity and Employment⁶ | Economic Well-Being⁷ |
| Genesee | 82.8 | 79.8 | 79.5 | 84.1 | 97.7 |
| Livingston | 89.1 | 73.7 | 77.2 | 113.3 | 98.5 |
| Monroe | 106.0 | 105.2 | 88.9 | 127.5 | 95.1 |
| Ontario | 102.1 | 96.7 | 90.2 | 118.6 | 104.2 |
| Orleans | 94.7 | 82.5 | 79.2 | 121.4 | 97.8 |
| Seneca | 84.4 | 82.6 | 83.6 | 82.9 | 97.2 |
| Wayne | 100.4 | 90.4 | 86.8 | 124.9 | 97.4 |
| Wyoming | 83.3 | 80.4 | 83.7 | 79.7 | 101.7 |
| Yates | 87.8 | 76.4 | 92.4 | 91.3 | 97.5 |
| G-FL Region | 103.6 | 98.5 | 87.6 | 127 | 96.5 |
| New York State | 98.4 | 97.2 | 91.3 | 106.9 | 98.3 |
| United States | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Source: Indiana Business Research Center

Table 21 *Innovation Index, G-FL Region, New York State, and U.S. (2012)* shows the Innovation Index for each county within the Region. The regional Innovation Index for the G-FL Region in 2012 was 103.6, 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 2012 was Monroe

⁴ Consists of educational attainment; population growth rates; high-tech employment share; and technology based employment occupations.

⁵ Consists of average venture capital; average private R&D; broadband density; establishment churn; and establishment sizes.

⁶ Consists of change in high tech employment; job growth; GDP per worker; and average patents per 1,000 workers.

⁷ Consists of average poverty rate; average unemployment rates; average net migration; average per-capita personal income, and compensation.

County with an Index of 106.0. The county with the lowest Innovation Index for 2012 was Genesee County with an Index of 82.8.

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

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 Computer and Electronic Product Manufacturing Industry Cluster with an employment location quotient of 2.42, as shown in Table 22- *G-FL Region Industry Cluster Analysis Employment (2012)*. Other industries which the Region has a high concentration of employment include Advanced Materials (1.69), Chemicals & Chemical Based Products (1.69), Machinery Manufacturing (1.57) and Fabricated Metal Product Manufacturing (1.56). 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 (2012)

| | Genesee | Livingston | Monroe | Ontario | Orleans |
|--|-------------|-------------|-------------|-------------|-------------|
| Advanced Materials | 0.72 | 0.78 | 1.67 | 2.06 | 2.81 |
| Agribusiness, Food Processing & Technology | 2.84 | 2.64 | 0.46 | 1.30 | 3.9 |
| Apparel & Textiles | 0.15 | 0.09 | 0.55 | 0.52 | 3.82 |
| Arts, Entertainment, Recreation & Visitor Industries | 1.43 | 0.41 | 0.66 | 1.04 | 0.25 |
| Biomedical/Biotechnical (Life Sciences) | 0.95 | 0.78 | 1.30 | 1.15 | 0.80 |
| Business & Financial Services | 0.36 | 0.25 | 0.95 | 0.44 | 0.41 |
| Chemicals & Chemical Based Products | 1.18 | 0.94 | 1.71 | 2.49 | 1.89 |
| Defense & Security | 0.41 | 1.12 | 0.53 | 0.28 | 1.23 |
| Education & Knowledge Creation | 0.62 | 0.85 | 1.80 | 1.02 | 0.28 |
| Energy (Fossil & Renewable) | 0.75 | 0.96 | 0.60 | 0.47 | 0.56 |
| Forest & Wood Products | 0.43 | 0.45 | 0.49 | 0.8 | 1.23 |
| Glass & Ceramics | 5.73 | - | 0.62 | 3.46 | 3.52 |
| Information Technology & Telecommunications | 0.64 | 0.50 | 1.18 | 1.17 | 0.60 |
| Manufacturing Supercluster | 1.83 | 0.96 | 1.06 | 1.52 | 2.30 |
| Computer & Electronic Product Mfg. | 1.58 | 1.09 | 2.02 | 3.63 | 7.33 |
| Electrical Equipment, Appliance & Component Mfg. | 0.21 | 1.19 | 0.80 | 0.96 | - |
| Fabricated Metal Product Mfg. | 2.26 | 1.43 | 1.41 | 1.60 | 1.64 |
| Machinery Mfg. | 4.28 | 1.25 | 1.09 | 1.08 | 0.75 |
| Primary Metal Mfg. | - | - | 0.45 | - | - |
| Transportation Equipment Mfg. | 0.70 | 0.27 | 0.07 | 0.40 | 0.91 |
| Mining | 1.87 | 6.35 | 0.34 | 0.66 | 2.26 |
| Printing & Publishing | 0.56 | 0.45 | 1.02 | 0.72 | 1.48 |
| Transportation & Logistics | 0.76 | 0.34 | 0.43 | 0.51 | 0.41 |
| Total All Industries | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 |

Table 22 – G-FL Region Industry Cluster Analysis Employment (2012) (continued)

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|--------------|-------------|-------------|-------------|-------------|
| Advanced Materials | 0.56 | 2.96 | 0.76 | 2.07 | 1.69 |
| Agribusiness, Food Processing & Technology | 2.32 | 3.65 | 4.04 | 4.03 | 1.15 |
| Apparel & Textiles | 0.83 | 0.28 | 1.79 | - | 0.61 |
| Arts, Entertainment, Recreation & Visitor Industries | 0.38 | 0.35 | 0.92 | 0.72 | 0.69 |
| Biomedical/Biotechnical (Life Sciences) | 0.83 | 1.16 | 0.40 | 1.06 | 1.20 |
| Business & Financial Services | 0.35 | 0.23 | 0.29 | 0.33 | 0.76 |
| Chemicals & Chemical Based Products | 0.29 | 2.23 | 0.40 | 0.49 | 1.69 |
| Defense & Security | 2.66 | 0.48 | 0.45 | 1.32 | 0.59 |
| Education & Knowledge Creation | 1.26 | 0.18 | 2.02 | 2.21 | 1.52 |
| Energy (Fossil & Renewable) | 1.02 | 0.97 | 0.87 | 2.24 | 0.66 |
| Forest & Wood Products | 0.76 | 0.56 | 1.73 | 2.48 | 0.60 |
| Glass & Ceramics | 1.63 | 2.77 | 1.06 | - | 1.36 |
| Information Technology & Telecommunications | 0.26 | 1.15 | 0.29 | 2.04 | 1.08 |
| Manufacturing Supercluster | 2.71 | 2.68 | 1.17 | 0.99 | 1.28 |
| Computer & Electronic Product Mfg. | - | 4.69 | - | 2.71 | 2.42 |
| Electrical Equipment, Appliance & Component Mfg. | - | 3.04 | 3.45 | - | 1.00 |
| Fabricated Metal Product Mfg. | 0.30 | 3.3 | 2.65 | 0.17 | 1.56 |
| Machinery Mfg. | 14.92 | 2.32 | 0.64 | 1.90 | 1.57 |
| Primary Metal Mfg. | 2.2 | 0.61 | 3.41 | - | 0.60 |
| Transportation Equipment Mfg. | - | 0.88 | - | 0.21 | 0.21 |
| Mining | - | 1.05 | 7.66 | - | 0.94 |
| Printing & Publishing | 0.61 | 0.4 | 1.03 | 1.46 | 0.93 |
| Transportation & Logistics | 0.25 | 0.43 | 0.63 | 0.95 | 0.46 |
| 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 2.56, as shown in Table 23- *G-FL Region Industry Cluster Analysis Establishments (2012)*. Other industries which the Region has a high concentration of establishments include Computer and Electronic Product Manufacturing (2.05); Glass and Ceramics (1.92); Manufacturing Supercluster (1.74); Fabricated Metal Product Manufacturing (1.74); and Agribusiness, Food Processing & Technology (1.63). 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 (2012) | | | | | |
|---|----------------|-------------------|---------------|----------------|----------------|
| | Genesee | Livingston | Monroe | Ontario | Orleans |
| Advanced Materials | 1.43 | 0.80 | 1.58 | 1.51 | 1.40 |
| Agribusiness, Food Processing & Technology | 3.64 | 3.27 | 0.41 | 2.01 | 5.51 |
| Apparel & Textiles | 0.20 | 0.31 | 0.93 | 0.72 | 0.58 |
| Arts, Entertainment, Recreation & Visitor Industries | 1.22 | 1.33 | 0.90 | 1.42 | 1.41 |
| Biomedical/Biotechnical (Life Sciences) | 1.06 | 0.86 | 1.19 | 1.04 | 0.68 |
| Business & Financial Services | 0.49 | 0.56 | 1.06 | 0.63 | 0.38 |
| Chemicals & Chemical Based Products | 1.80 | 1.01 | 1.02 | 1.28 | 1.32 |
| Defense & Security | 0.51 | 0.70 | 0.93 | 0.60 | 0.58 |
| Education & Knowledge Creation | 0.83 | 0.89 | 1.17 | 1.15 | 0.92 |
| Energy (Fossil & Renewable) | 0.90 | 1.01 | 0.78 | 0.75 | 0.78 |
| Forest & Wood Products | 1.33 | 1.87 | 0.69 | 1.16 | 0.97 |
| Glass & Ceramics | 3.69 | - | 1.69 | 1.05 | 4.19 |
| Information Technology & Telecommunications | 0.37 | 0.52 | 1.05 | 0.71 | 0.23 |
| Manufacturing Supercluster | 1.98 | 1.14 | 1.69 | 1.98 | 1.50 |
| Computer & Electronic Product Mfg. | 0.37 | 1.12 | 2.01 | 3.84 | 2.10 |
| Electrical Equipment, Appliance & Component Mfg. | 0.90 | 2.72 | 0.99 | 1.27 | - |
| Fabricated Metal Product Mfg. | 2.24 | 0.95 | 1.65 | 1.67 | 1.56 |
| Machinery Mfg. | 4.08 | 1.59 | 2.61 | 2.38 | 1.79 |
| Primary Metal Mfg. | - | - | 0.96 | - | - |
| Transportation Equipment Mfg. | 0.59 | 0.60 | 0.33 | 0.84 | 1.12 |
| Mining | 4.65 | 3.13 | 0.61 | 1.71 | 4.89 |
| Printing & Publishing | 0.37 | 0.54 | 1.22 | 0.76 | 0.70 |
| Transportation & Logistics | 1.04 | 0.56 | 0.70 | 0.55 | 1.70 |
| Total All Industries | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 |

Table 23 – G-FL Region Industry Cluster Analysis Establishments (2012) (continued)

| | Seneca | Wayne | Wyoming | Yates | G-FL Region |
|--|-------------|-------------|-------------|-------------|-------------|
| Advanced Materials | 0.47 | 2.46 | 0.87 | 0.79 | 1.52 |
| Agribusiness, Food Processing & Technology | 3.69 | 4.23 | 5.43 | 5.81 | 1.63 |
| Apparel & Textiles | 0.78 | 0.43 | 0.66 | - | 0.78 |
| Arts, Entertainment, Recreation & Visitor Industries | 1.14 | 1.00 | 1.47 | 1.43 | 1.05 |
| Biomedical/Biotechnical (Life Sciences) | 0.97 | 0.96 | 0.73 | 1.04 | 1.10 |
| Business & Financial Services | 0.45 | 0.49 | 0.47 | 0.43 | 0.86 |
| Chemicals & Chemical Based Products | 0.19 | 1.55 | 0.64 | 1.14 | 1.10 |
| Defense & Security | 0.52 | 0.6 | 0.35 | 0.50 | 0.79 |
| Education & Knowledge Creation | 0.93 | 1.00 | 0.94 | 1.11 | 1.11 |
| Energy (Fossil & Renewable) | 1.08 | 0.86 | 0.74 | 0.72 | 0.80 |
| Forest & Wood Products | 1.17 | 0.87 | 1.82 | 1.64 | 0.92 |
| Glass & Ceramics | 1.40 | 3.65 | 1.19 | - | 1.92 |
| Information Technology & Telecommunications | 0.27 | 0.54 | 0.23 | 0.28 | 0.84 |
| Manufacturing Supercluster | 0.65 | 2.92 | 1.28 | 1.42 | 1.74 |
| Computer & Electronic Product Mfg. | - | 1.82 | - | 0.84 | 2.05 |
| Electrical Equipment, Appliance & Component Mfg. | - | 1.90 | 2.89 | - | 1.24 |
| Fabricated Metal Product Mfg. | 0.22 | 3.66 | 1.71 | 1.35 | 1.74 |
| Machinery Mfg. | 2.39 | 3.55 | 0.51 | 1.44 | 2.56 |
| Primary Metal Mfg. | 3.83 | 1.42 | 6.50 | - | 1.32 |
| Transportation Equipment Mfg. | - | 0.84 | - | 4.07 | 0.56 |
| Mining | - | 1.82 | 0.83 | - | 1.28 |
| Printing & Publishing | 0.44 | 0.35 | 0.59 | 0.31 | 0.97 |
| Transportation & Logistics | 0.60 | 0.86 | 1.26 | 0.99 | 0.75 |
| 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 Strategy has been completed and identifies strategies for freight movement within the Region. The Goods Movement Strategy also includes

a regional freight and economic profile; a SWOT analysis and needs assessment; and an identification, evaluation, and prioritization of freight improvement alternatives. Additional information about the Goods Movement Strategy 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 and the Region's close proximity to the Canadian border has resulted in measurable impacts to the highway and bridge network.

In 2010, trucks handled 90.5% of the total inbound tonnage to the Region and 95.6% 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.⁸ It is expected that because of the distinct competitive advantage that trucks offer in terms of flexibility for short hauls, they will continue to transport an increasingly larger portion of the Region's goods.

3.4.h.ii Rail Service

The transport of freight in the Region via railroads continues to decline. Two Class I railroads, CSX and Norfolk Southern, and ten Class III (shortline) railroads, operate in the Region. Over 4.9 million tons of goods were transported to and from the Region via rail in the year 2010⁹. It is not expected that the number of tons of goods shipped to and from the Region via rail will increase at a fast pace in the future, with trucks handling most of the increase in freight shipping.

3.4.h.iii Air Cargo

The air cargo airport within the Genesee-Finger Lakes Region is the Greater Rochester International Airport. According to the Federal Aviation Administration, 294,248,996 pounds of freight landed at the Greater Rochester International Airport in 2013. This represented an increase of 12.2% from the 262,333,112 pounds of freight that landed in calendar year 2012¹⁰. The close proximity of the Buffalo-Niagara International Airport and the Syracuse Hancock International Airport along with the ease of truck access into the Finger Lakes Region from these airports, allows goods bound for the Finger Lakes Region to be shipped to these other airports and then trucked to their final destination.

⁸ GTC/NYS DOT. "Transportation Strategies for Freight/Goods Movement in the Genesee-Finger Lakes Region. Task 3: Regional Freight and Economic Profile Draft Technical Memorandum."

http://gtcmpo.org/Freight/RegionalFreight&EconomicProfile_2012-05-08.pdf

⁹ Ibid.

¹⁰ http://www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/passenger/media/preliminary-cyl3-cargo-airports.pdf

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. In recent years redevelopment of the Port of Rochester has focused on public infrastructure improvements, commercial and residential development, and waterfront access. Water transport via the Erie Canal is also limited by the 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.

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 Investing in Manufacturing Communities Partnership

The City of Rochester led a successful Regional application to designate the Finger Lakes Region has a Manufacturing Community under the Investing in Manufacturing Communities Partnership (IMCP) program. The designation will offer Regional communities preferential consideration for up to \$1.3 billion in federal funding and assistance from 10 federal agencies to assist in cultivating an environment for businesses to create well-paying manufacturing jobs.

The successful Regional manufacturing strategy identified several key components including: enhancement of Regional workforce training programs; reinventing the Region's supply chain networks; expanding investments in research and innovation programs; revitalization of the Eastman Business Park; expansion of international trade and foreign investment; and the identification and leveraging of development capital¹¹.

4.3 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. The mission of ESD is *"to promote a vigorous and growing economy, encourage the creation of new job and economic opportunities, increase revenues to the State and its municipalities, and achieve stable and diversified local economies."*¹²

As the designated federal Economic Development District representative of the Finger Lakes Region, G/FLRPC continues to work closely with Empire State Development and New York State on the development and implementation of economic development priorities. To this end

¹¹ <http://www.cityofrochester.gov/article.aspx?id=8589961386>

¹² <http://www.esd.ny.gov/AboutUs.html>

G/FLRPC has been an active participant in the development of the State Regional Economic Development Council Strategic Plan for the Finger Lakes Region, entitled “Accelerating Our Transformation” and the latest update to the plan entitled “Accelerating our Transformation: Year 4.”

G/FLRPC also works closely with its nine-member counties gathering input and comments, in coordination with Empire State Development, regarding state economic development policies and programs. Additionally, G/FLRPC organizes forums and discussions amongst regional economic development stakeholders through regional roundtables, Economic Development Advisory Committee/Regional Development Corporation meetings, Planning Coordination Committee meetings, and Genesee/Finger Lakes Regional Planning Council meetings. With the diversity of stakeholders present at each of these meetings, they provide an excellent opportunity to coordinate economic development efforts at the local, state, regional, and federal level.

Empire State Development 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.

4.3.a Upstate Revitalization Initiative

In January 2015 New York State launched the Upstate Revitalization Initiative program aimed at systematically revitalizing the economy of Upstate New York. The program was modeled after the success of the Buffalo Billion Initiative and provides the opportunity for seven upstate regions to address the economic challenges of their regions and work together in bringing back jobs to upstate New York. Each of the seven upstate regions, including: Capital Region, Central New York, Finger Lakes, Mid-Hudson, Mohawk Valley, North County, and Southern Tier, will complete a strategic plan outlining the economic needs of their region. The three regions identified as the “Best Plan Awardees” will receive \$500 million each that will be utilized for projects identified by the Regional Economic Development Councils.¹³

4.3.b START-UP NY

Governor Cuomo established START-UP NY to create tax free communities for new and expanding businesses on State University of New York and other university campuses across the state. The program allows businesses to locate to these zones and operate 100% tax-free for 10 years. As a result, qualifying businesses will not pay any income tax, business or corporate state or local taxes; sales tax, property tax; or franchise fees for a period of 10 years.

Currently there are 20 sites located within the Finger Lakes Region that have been approved as START-UP NY sites, which are associated with the colleges and universities of Genesee Community College; SUNY Geneseo; Rochester Institute of Technology; Monroe Community College; Finger Lakes Community College; and the College at Brockport.

4.3.c New York State Regional Economic Development Councils

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 developed an initial

¹³ <https://www.ny.gov/programs/upstate-revitalization-initiative>

five-year Strategic Plan in November 2011, that included 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 Strategic Plan, entitled “Accelerating our Transformation”, outlined two specific goals for the Region: Accelerate Job Creation and Strengthen Region’s Quality of Life. Also outlined within the Strategic Plan were Regional Strategies which included: Optimize Business Creation, Retention, and Expansion; Strengthen Academic and Industry Partnerships; Align Workforce Development Efforts with Sector Needs; and Invest in Community and Industrial Development Infrastructure. Tied to these goals and strategies were Priority Projects and Actions to help guide implementation efforts. The specific priority projects identified within the Finger Lakes Economic Development Council’s Strategic Plan are identified and outlined in section 5.1.

With Strategic Plans in place within each Region, New York State established the Consolidated Funding Application process, which is outlined below in section 4.2.b.

4.3.d New York State Consolidated Funding Application Process

The New York State Consolidated Funding Application (CFA) was established in line with the Regional Economic Development Councils to competitively award economic development funds to assist Region’s in the implementation of their Economic Development Strategic Plans. Within 2014 the CFA process will award up to \$750 million in state resources, including \$220 million from Empire State Development, to support economic development projects that are in alignment with the Regional Council’s strategic plans.

State agencies and authorities making resources available through the CFA includes: Empire State Development; NYS Canal Corporation; NYS Energy Research and Development Authority; New York Power Authority; Environmental Facilities Corporation; Homes and Community Renewal; Department of Labor; Parks, Recreation and Historic Preservation; Department of State; Department of Environmental Conservation; Office of Storm Recovery; and the Council on the Arts.¹⁴ Several of the available funding opportunities are discussed in the following sections. The deadline for applications under the CFA was June 16, 2014.

4.3.e Empire State Development

4.3.e.i Empire State Development Grant Funds

Empire State Development provides direct assistance to businesses through three grant programs: Regional Council Capital Fund; Empire State Economic Development Fund; and the Urban and Community Development Program. Funding is available for capital-based economic development initiatives intended to create or retain jobs; reduce or eliminate unemployment; and/or increase business activity and investment. Regional Council Capital Fund grants will be allocated to region’s based upon implementation of the Strategic Plan, and will be allocated to priority projects identified within the Strategic Plan. The Finger Lakes Region priority projects are outlined in section 5.1.

¹⁴<http://regionalcouncils.ny.gov/assets/documents/resources-available-2014.pdf>

4.3.e.ii 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. Applications for the Excelsior Jobs Program are accepted as part of the Consolidated Funding Application process. Additional information regarding program eligibility and application requirements is available online at www.esd.ny.gov/BusinessPrograms/Excelsior.html.

4.3.e.iii. New York State Innovation Hot Spot Support Program

The New York State Innovation Hot Spot Support Program was established to provide financial support for business incubators within the State through the designation of New York State Innovation Hot Spots. Companies located within designated Hot Spots will receive state income and sales tax benefits for a period of five years with the program aim to improve the quality of incubator services to successfully transition businesses from their start-up phase to large scale commercialization¹⁵.

4.3.e.iv. Empire State Development Strategic Planning and Feasibility Studies

Empire State Development provides funding to help cities, counties, and municipalities to complete strategic development plans and feasibility studies for sites or facility assessment and planning through the Urban and Community Development Program. Projects should focus on economic development with an emphasis being placed upon projects located in distressed communities¹⁶.

4.3.e.v Market New York

The Market New York program provides funding support for projects which bolster tourism and/or create or retain jobs. Assistance is provided for the promotion of tourism destinations, attractions, and special events. Capital support is also available through the Market New York program to provide assistance with land acquisition; construction costs, and acquisition of furniture and fixtures for existing tourism destination facilities¹⁷.

4.3.e.vi 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

¹⁵ <http://regionalcouncils.ny.gov/assets/documents/resources-available-2014.pdf>

¹⁶ <http://regionalcouncils.ny.gov/assets/documents/resources-available-2014.pdf>

¹⁷ <http://regionalcouncils.ny.gov/assets/documents/resources-available-2014.pdf>

obligations. Within the Finger Lakes Region, Empire State Development has contracted with Pathstone Enterprise Center, Inc. to administer and operate the loan fund. Additional information regarding the program is available online at www.esd.ny.gov/BusinessPrograms/SBRLF.html.

4.3.e.vii 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 program is operated by the New York State Division of Science, Technology and Innovation operating under Empire State Development. 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 Genesee-Finger Lakes Region and is detailed in section 4.5.c. and section 5.6.

4.3.f New York State Energy Research and Development Authority (NYSERDA)

4.3.f.i Economic Development Growth Extension Program

The Economic Development Growth Extension Program offers local, regionally-based access to NYSERDA energy efficiency, renewable energy and research and development programs. There are 26 Regional Outreach Contractors located throughout New York State's 10 regions, which provide program outreach to commercial, institutional, municipal, industrial, and residential customers. Greater Rochester Enterprise is the Regional Outreach Contractor for the nine-county Finger Lakes Region.

4.3.f.ii NYSERDA Cleaner, Greener Communities Program

The Cleaner, Greener Communities Program was announced by Governor Cuomo in his 2011 State of the State address as a \$96 million competitive grant program to encourage communities to develop regional sustainable growth strategies. The first phase of the program was development of a Regional Sustainability Plan, which established a statewide sustainability planning framework to aid in statewide infrastructure investment decision making; outline actions to reduce greenhouse gas emissions; inform municipal land use policies; and serve as a basis for local government infrastructure decision making. The Genesee-Finger Lakes Region completed the development of a Regional Sustainability Plan under Phase I of the Cleaner, Greener Communities Program, entitled "Finger Lakes Regional Sustainability Plan", in May 2013.

4.3.f.iii Cleaner Greener Communities Program Phase II Implementation Grants

The second phase of the Cleaner Greener Communities Program provides \$90 million for the implementation of specific projects that provide the greatest opportunities for achieving carbon reductions, energy efficiency savings, and renewable energy deployment consistent with region's sustainability and Regional Economic Development Council strategic plans. The \$90 million in

available funding consists of three allocations of approximately \$30 million for the years 2013, 2014, and 2015.

4.3.f.iv NYSEERDA Flexible Technical Assistance

FlexTech Audits are offered under the Green Jobs Green New York program and allow for free walkthrough audits of small businesses, commercial facilities, and not-for-profit corporations to identify energy efficiency improvements.

4.3.f.v Existing Facilities Program

The Existing Facilities Program offers performance based incentives to encourage applicants to implement energy efficiency projects to lower energy costs. The program also offers incentives to encourage applicants to purchase and install energy-efficient equipment for qualifying projects.

4.3.f.vi Industrial and Process Efficiency Program

The Industrial and Process Efficiency Program assists commercial and industrial manufacturers and data centers in identifying ways to improve energy efficiency through capital investments and process improvements. Assistance is provided through capital incentives and practical technical assistance.

4.3.f.vii New Construction Program

The New Construction Program provides technical assistance and financial incentives to promote the installation of energy-efficient electric equipment in new and renovated commercial and industrial buildings.

4.3.g New York Power Authority

4.3.g.i New York Power Authority ReCharge New York

The ReCharge New York program provides low cost electricity allocations to business and not-for-profit corporations in order to help create and retain jobs. Businesses and not-for-profit corporations are eligible to extend the low cost electricity allocation for a period of up to seven years, provided they meet specified employment commitments and other contract terms. The ReCharge New York program places an emphasis on businesses that are planning to relocate to New York State or for businesses looking to expand their existing New York State operation.

4.3.h New York State Office of Community Renewal

4.3.h.i Community Development Block Grant Program

The Community Development Block Grant Program offers assistance to small communities and counties to undertake activities that focus on community development needs such as creating or expanding job opportunities; providing safe and affordable housing opportunities; and addressing local public infrastructure and public facilities issues. Awards are made within four targeted areas: economic development, small business assistance, public infrastructure, or public facilities.

4.3.h.ii New York Main Street Program

The New York Main Street Program was established to provide resources to assist New York communities with Main Street and downtown revitalization efforts. The program aims to stimulate reinvestment in mixed-use commercial districts and adjacent neighborhoods by providing resources. Many communities within the Finger Lakes Region have been funded through this program and are discussed in section 4.9.

4.3.i 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.

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/>.

4.4 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 2012 and June 30th 2013 the GLOW WIB administered over \$295,000 in individual training accounts, on the job and customized training for 177 individuals as well as served over 45,000 customers at the GLOW One Stop Centers, placing 4,132 of those customers in jobs. The GLOW WIB also assisted in the implementation of the Finger Lakes Food Cluster (discussed within section 4.5.c.iii) providing assistance to 228 individuals with \$194,000 available through the Food Processing Cluster initiative.

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, Seneca, Wayne, and Yates 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, 2012 and June 30, 2013 over \$728,000 was administered in individual training accounts and over 9,100 individuals were assisted with services through the five Finger Lakes Works career centers. During this period over 350 businesses were also assisted with services from Finger Lakes Works and over 8,800 jobs were posted.

Finger Lakes Works also continues its efforts to target key regional industries including: Advanced Manufacturing, Healthcare, Travel/Tourism, Agriculture, Information Technology, and Skilled Trades. The Finger Lakes Workforce Investment Board has also started the Finger Lakes Skills2Compete program, which is an outreach effort to showcase jobs that require more than a high school diploma and less than a four year degree and helping to provide services and information to prepare workers for these jobs.

Finger Lakes Works also operates the Finger Lakes Advanced Manufacturers Enterprise (FAME). FAME is a partnership amongst manufactures to increase development and prosperity in the Region through manufacturing networking and preparing youth for careers in manufacturing. FAME works to address hiring and training issues; pipeline issues; and manufacturing perception issues within the Region.

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 2013 Rochester Works held the fifth annual Greater Rochester Regional Career Conference and Job Fair, with over 60 businesses and over 1,000 job seekers in attendance. Rochester Works

also assisted 19 businesses with training for 283 individuals in the 2012-2013 fiscal year. During this time period Rochester Works also held 8 youth recruiting events and assisted over 800 youths through the Summer Youth Employment Program and the City of Rochester's Summer of Opportunity Program.

4.4.b New York State Department of Labor

4.3.b.New York State Department of Labor Workforce Investment Act Program

The New York State Department of Labor provides grants on a competitive basis for occupational skills upgrading and training of employed and unemployed workers to enhance hiring and workforce skills. For employed workers these programs are provided as existing employee training or new hire training. For unemployed workers these programs are provided as unemployed worker training.

4.5 Regional Marketing, Research and Entrepreneur Activities

4.5.a Greater Rochester Enterprise

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

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

GRE's client-driven project management services include:

- Professional, timely responses to all requests for information from business executives, including site searches and detailed data compilation.
- An economic gardening and internal harvesting initiative with the support of the Edward Lowe Foundation and economic development organizations in all nine counties.
- Professional, full service management of business attraction and expansion projects.
- Professional proposal development/project management for business attraction and expansion 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 Golisano Institute for Sustainability

The Golisano Institute for Sustainability (GIS) at Rochester Institute of Technology (RIT) 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 the Center for Integrated Manufacturing Studies (CIMS) at RIT.

4.5.b.i GIS Research Building

GIS completed construction of its new 75,000 sq. ft. LEED certified research building on the RIT campus in early 2013. It incorporates state-of-the-art sustainable building technologies and smart computing/energy systems, and will serve as a living laboratory for scientific discovery and experiential learning. This building will also provide New York State with a strategic advantage as an unparalleled center for education, research, technology and expertise that will enable the State to capitalize on and capture economic growth opportunities.

The new building houses systems-level integration testbeds and sustainability support laboratories. These unique R&D units will develop innovative and sustainable technologies that can be transferred to businesses to help stimulate economic growth and new job creation in local/regional/national industrial sectors.

Applied research in the new building will be conducted in dedicated testbed and support laboratories, which include Smart Building Testbed; Smart Micro-Grid Testbed; Fuel Cell Testbed; Electric Propulsion Testbed; Sustainable Electronics Testbed; Eco-IT Testbed; Remanufacturing and Recycling Testbed; NanoMaterials Integration Lab; Innovation and Entrepreneurship Lab; Material Science Laboratory; Sustainable Building Materials Lab; and Environmental Chemistry and Characterization Lab.

4.5.b.ii GIS Research Centers

The Golisano Institute for Sustainability maintains research centers/institutes that apply 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.

4.5.b.ii.a Center for Sustainable Production

The Center for Sustainable Production (CSP) is dedicated to enhancing the environmental and economic performance of products and processes. This Center develops and applies tools for environmentally sustainable design, a holistic approach to creating high quality products with minimal ecological impact.

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

The Center for Remanufacturing and Resource Recovery (C3R) is internationally recognized as a leading center for research in remanufacturing. Since 1990, C3R 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. C3R conducts research in Structural and Materials Analysis, Environmentally Responsible Cleaning Technologies, Intelligent Testing and Diagnosis, and Design for Remanufacturing.

4.5.b.ii.c Center for Sustainable Mobility

Center for Sustainable Mobility (CSM) was 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.ii.d 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.c 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.c.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. The *Roadmap* report identified ten competitive challenges 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; and Limited Linkages to Universities.

4.5.c.ii Roadmap Implementation Activities

Subsequent funding from the U.S. Department of Commerce, Economic Development Administration has supported implementation efforts of pilot projects designed to address the competitive challenges identified in the *Roadmap*. Several of these projects/programs are outlined below.

4.5.c.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; technology forecasting; education on competitive technologies, know-how and implementation strategies; best practices identification, global benchmarking and promotion; and regional resource inventory, analysis and strategy development.

4.5.c.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; value-engineering research projects; implementation support; providing assistance and support to companies pursuing innovation through advanced technologies; and providing facilities, equipment and laboratory support for validation, testing and feasibility studies in support of innovative concepts.

4.5.c.iii Finger Lakes Food Processing Cluster Initiative

The Finger Lakes Food Processing Cluster Initiative (FLFPCI) is a coordinated effort led by the Center for Integrated Manufacturing Studies at Rochester Institute of Technology in conjunction with several partner organizations, to spur economic growth and job creation in the nine-county Finger Lakes region of Upstate New York. The goal of FLFPCI is to support and unify the stakeholders of the cluster to achieve synergistic results. To assist Finger Lakes Food Processing Cluster businesses, the Initiative offers three program opportunities.

4.5.c.iii.a FLFPCI Advancement Program

This program provides assistance to area food processing and agricultural businesses, which includes identifying and implementing technical improvements and sustainable manufacturing process technologies to reduce operating costs, minimize environmental impacts, open market opportunities, start new businesses, and retain and grow jobs.

4.5.c.iii.b FLFPCI Training Program

This program was established to identify and ultimately bridge the gap between the existing workforce skill-set and the qualifications required by food and agriculture businesses in the region.

4.5.c.iii.c FLFPCI Small Business Assistance Program

This program provides assistance to 7(j) eligible existing small businesses within the cluster. This program proactively seeks eligible businesses to encourage participation in the Finger Lakes

Food Processing Cluster Training Program and the Finger Lakes Food Processing Cluster Advancement Program.

4.5.c.iv Applied Technology

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.c.v 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.d 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 State University of New York Polytechnic Institute's (SUNY Poly) Colleges of Nanoscale Science and Engineering (CNSE). 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 to mid-volume MEMS manufacturing facility. For more information on STC see section 5.6.

4.5.e 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 tech" incubator termed the Tech Farm. With the facility operating at 100% occupancy 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. Additional information about the Cornell Agriculture and Food Technology Park is available in section 5.6.

4.5.f The Entrepreneurs Network

The Entrepreneurs Network (TEN), now in its sixth 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.

4.5.g Monroe County Finger Lakes Procurement Technical Assistance Center

The 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. The Monroe County Finger Lakes 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. Over the last ten years 454 small businesses have been awarded contracts through the PTAC program helping to create or retain 7,903 jobs.

4.5.h High Tech Rochester

High Tech Rochester (HTR) is a not-for-profit organization whose mission is to be a catalyst for entrepreneurship and innovation-based economic development, by applying business expertise and network connections to aid in the formation and profitable growth of companies in the Genesee-Finger Lakes Region. HTR provides a suite of services including: technology commercialization assistance for very early-stage ideas; business incubation for high-growth potential startups; and growth and profit improvement consulting for more mature businesses. HTR serves as the Empire State Development (NYSTAR division) designated Regional Technology Development Center for the Genesee-Finger Lakes Region, and as such is also an affiliate of the NIST Manufacturing Extension Partnership (MEP) Program.

In addition to its 1-on-1 work with local entrepreneurs and business owners, HTR also manages several well-known initiatives including the Pre-Seed Workshop; The Entrepreneurs Network (TEN); the Rochester Regional Business Plan Contest; a nationally recognized best practice Entrepreneur-in-Residence (EIR) program; the statewide New York State Energy Research and Development Authority EIR program; NEXUS-NY: one of three statewide clean tech proof of concept centers funded by NYSERDA, and provides back office support for the Rochester Angel Network. HTR co-manages the region's Innovation Hotspot, which provides mentoring and tax benefits to local startups, and is also a STARUP-NY designated location. HTR currently manages two business incubator facilities: The Lennox Tech Enterprise Center and the Rochester BioVenture Center, which is the first wet lab biotech incubator in the region. HTR is also currently seeking to develop the Business Accelerator Cooperative – a priority project of the Finger Lakes Region – which will establish a new incubator/accelerator hub facility, establish several connected node locations, and better coordinate and expand supporting services to regional entrepreneurs.

HTR is also involved in several Regional innovation/entrepreneurship initiatives including: the Innovation Hotspot (discussed in section 4.3.d.iii); START-UP NY (discussed in section 4.3a), which the Lennox Tech Enterprise Center, run by HTR, is a part of; and the Business Accelerator

Cooperative, which is installing hub/node video conferencing system at 7 locations throughout the Finger Lakes Region and working towards the establishment of a downtown Hub location in 2014 that will help formulate an Innovation District within the City of Rochester.

4.5.i 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 startup companies. Since inception, Excell's metrics are:

- Invested over \$6 million in 39 New York companies
- Created 289 new jobs
- Average salary of new jobs is \$76,000
- Total leverage ratio on Excell investments is over 50X
- Average survival rate of Excell companies is 86% compared to a national trend of 42%
- One new job is created for every \$25K invested by Excell

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. Investment is focused on the following sectors: Medical Devices; Biotech; Industry/Energy; Consumer Products; and IT/Software.

Excell Partners, Inc. was one of six venture firms chosen to receive \$2.5 million from Empire State Development as part of a \$25 million investment as part of the Governor's Innovate NY program. In 2013, Excell was ranked in the Top 20 Most Active Seed Funds in the US by PitchBook Data, Inc.

4.5.j Center of Excellence in Data Sciences

The University of Rochester's Goergen Institute for Data Science, and its' recently New York State designated Rochester Center of Excellence in Data Science, are helping to establish the region and the state as a hub for new talent and a leader in analyzing and commercializing the limitless uses of data to improve quality of life and to fuel economic growth.

As part of the Institute, the center will build upon University infrastructure and expertise in data science and high performance computing, while collaborating with other academic partners, industry, and government agencies, to support:

- Research: Generate innovative technologies and methods, while increasing competitive research grants and public-private partnerships
- Commercialization and Incubation: Drive growth of large and small commercial partners by supporting the commercialization of new products and services, and providing access to business acceleration programs
- Consultations and Resources: Facilitate access to advanced computing and data visualization facilities, resources and expertise

- Education and Training: Increase the pool of well-trained, highly skilled data scientists to meet national demands by supporting formal graduate and undergraduate programs and experiential learning opportunities

4.5.k Center for Emerging and Innovative Sciences

The Center for Emerging & Innovative Sciences (CEIS) promotes economic development through industry-university collaboration and technology transfer. Based at the Hajim School of Engineering & Applied Sciences at the University of Rochester, CEIS is one of fifteen Centers for Advanced Technology (CATs) funded by NYSTAR, a division of the New York State Department of Economic Development. CEIS works primarily with faculty and scientists at the University of Rochester and the Rochester Institute of Technology, although it does support some research at other universities in New York. CEIS works closely with small, mid-sized, and large companies in the Finger Lakes region and across the state.

4.5.k.i Rochester Regional Optics, Photonics, and Imaging Accelerator

The Rochester Regional Optics, Photonics, and Imaging Accelerator (or RRPA) is a program to help grow the Rochester cluster of companies in the Optics, Photonics, and Imaging industries. The project is funded through an award of \$1.9 million from five different federal agencies with an additional \$190,000 in funding from New York State. The five federal agencies are the Economic Development Administration (EDA), NIST, DOE, the Employee and Training Administration (ETA) and the Small Business Administration (SBA). These five agencies have teamed up in what is called the Advanced Manufacturing Jobs and Innovation Accelerator Challenge (AMJIAC). The purpose of this Challenge is to coordinate the governments' investments in economic development in some of the Nation's most important industrial clusters. The RRPA proposal was one of only ten awards and represents the federal government's strong commitment to the Rochester Optics, Photonics and Imaging cluster. The RRPA brings together for the first time five leading regional organizations to help strengthen the region's Optics, Photonics and Imaging cluster of companies in a coordinated and comprehensive manner, in the areas of cluster development; business development; technology development, and workforce development. Participating organizations include: the University of Rochester, Rochester Institute of Technology, Monroe Community College, High Tech Rochester, and the Rochester Regional Photonics Cluster.

4.5.k.ii New York Photonics Manufacturing Initiative

The New York Photonics Manufacturing Initiative, led by the Center for Emerging and Innovative Sciences (CEIS), was one of only nineteen national Advanced Manufacturing Technology Consortia (AMTech) awards made by the National Institute of Standards and Technology (NIST) in May 2014. The New York Photonics Manufacturing Initiative will assist in developing national and regional technology roadmaps for the U.S. photonics industry and laying the groundwork for a national institute dedicated to advancing and diffusing photonics-based manufacturing technologies. The program leverages regional strengths in education, workforce training, technology development and incubation to accelerate growth of optics, photonics, and imaging companies.

4.5.l Rochester Regional Photonics Cluster

The Rochester Regional Photonics Cluster (RRPC) is a not-for-profit organization founded to promote and enhance the New York State optics, photonics, and imaging industry by fostering the cooperation of business, academia and government. RRPC membership includes over 50 companies that supply optics, photonics, or imaging products and services and over 40 support companies. RRPC and CEIS work closely together with RRPC providing in depth knowledge and strong ties to the industrial community with the Center for Emerging and Innovative Sciences (CEIS) providing the same with the academic community.

4.5.m American Institute for Manufacturing Integrated Photonics

In July 2015, Vice President Biden and Governor Cuomo announced that Rochester will be the headquarters for the newest manufacturing innovation hub, the American Institute for Manufacturing Integrated Photonics (AIM Photonics). AIM Photonics will be part of the federal National Network of Manufacturing Innovation, to create a competitive, effective, and sustainable manufacturing research-to-manufacturing infrastructure for U.S. industry and academia to solve industry-relevant problems. The University of Rochester and Rochester Institute of Technology are key partners in the consortium that has won the national competition to advance U.S. photonics manufacturing capability. AIM Photonics will receive \$110 million from the U.S. Air Force Research Laboratory. Federal funding, to begin in January 2016, will be supplemented by another \$250 million from the State of New York, with additional funding commitments from public and private partners expected to exceed \$245 million over the next five years for a 5:1 matching of federal funds. The team, led by SUNY Polytechnic Institute, put together by a coast-to-coast academic/industry consortium that includes the University of Rochester, RIT, MIT, University of Arizona, University of California-Santa Barbara, and Columbia University among its major academic partners, and Boeing, IBM, Intel, Hewlett-Packard, Lockheed Martin, Infinera, Corning and Synopsis among its corporate partners. There are a total of 90 partners from 18 states. In addition to support from NYS, AIM Photonics is supported by the states of California and Massachusetts, along with leading national and regional industry consortia and economic development agencies.

4.6 Infrastructure

For the purpose of the CEDS document, infrastructure is defined as the facilities and services necessary for an economy to function. The following sections highlight transportation; telecommunication; energy; water; and wastewater within the Genesee-Finger Lakes Region.

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 nearly 27,000 lane miles of interstate, arterial and collector roadways, 1,599 bridges, 650 miles of active railroad lines, over 340 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 regional organization with the responsibility for federally-funded transportation policy, planning, and investment decision making in the Region is the Genesee Transportation Council (GTC), the designated Metropolitan Planning Organization (MPO).

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. The *Long Range Transportation Plan for the Genesee-Finger Lakes Region 2035 (LRTP 2035)* was adopted in June 2011. This assessment was guided by 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 and extended through 2012.

A new multi-year federal transportation authorization bill – Moving Ahead for Progress in the 21st Century (MAP-21) was enacted on July 6, 2012. The new authorization bill establishes, for the first time, performance-based planning and programming to increase accountability and transparency.

The next *Long Range Transportation Plan for the Genesee-Finger Lakes Region 2040 (LRTP 2040)* is being developed consistent with MAP-21 and will provide the strategic direction for more detailed planning and implementation of transportation projects over the next 25 years. It is anticipated that the *LRTP 2040* will be adopted in June 2015.

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 the Genesee-Finger Lakes Regional

Critical Transportation Infrastructure Vulnerability Assessment; Village of Scottsville Traffic Circulation and Safety Study; Village of Webster Village Core Circulation, Accessibility, and Parking Study; East Rochester Transportation Improvement Study; Congestion Management Process Implementation; Rts 5&20 and State Rt. 364 Multi-Modal Safety and Access Improvement Study; Mount Read Boulevard Corridor Study; Dansville Transportation and Industrial and Commercial Access Study; Ontario County Railway Corridor Development Plan: Area 1 - Town of Manchester; East Main Arts & Market District Study; NYS Route 250 Transit-Supportive Mixed-Use Development District; Town of Penfield Transit-Supportive Mixed-Use Development District; and Goods Movement Planning. 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 identify improvements that will position the transportation system of the region as a distinguishing factor in retaining and attracting both traditional and emerging-technology manufacturing firms as well as enhancing the viability of agriculture and associated processing companies.

The Regional Goods Movement Strategy has been completed and approved. The Goods Movement Strategy identifies strategies for freight movement within the Region and includes a regional freight and economic profile; a SWOT analysis and needs assessment; and an identification, evaluation, and prioritization of freight improvement alternatives. Alternatives have been developed for near-, mid-, and long-term improvements and strategies across all modes of freight transportation. The Goods Movement Strategy 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. The completed site reports have been fully incorporated in the Regional Goods Movement Strategy as recommended alternatives.

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 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 2014-2017 TIP was adopted in June 2013.

4.6.a.iv Passenger and Freight Rail

One of the transportation funding priorities of the 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. The Draft Environmental Impact Statement for the Empire Corridor conducted by the New York State Department of Transportation is currently available for public review.

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.

MAP-21 included significant national freight provisions calling for the establishment of a national freight network, development of a national freight strategic plan, and additional shared-funding opportunities for freight related infrastructure projects. MAP-21 also strongly encourages State departments of transportation to adopt state freight plans. The NYS Department of Transportation is currently pursuing the development of a MAP-21 compliant state freight 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. Last mile internet connections, particularly in the rural areas of the Region, are also critical to retaining and attracting businesses.

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. Ontario County has completed construction of a fiber optic ring that can serve as a critical link between the Monroe County ring and the ring located within the Southern Tier. Yates County was recently awarded \$2.4 million under the ConnectNY initiative, which will help connect 10,400 households to broadband. Many counties have also identified further telecommunications planning and implementation as part of their CEDS priorities, identified in Chapter 5.

4.6.c Energy

4.6.c.i Traditional Energy

The utility companies that serve the Genesee-Finger Lakes Region are New York State Electric & Gas (NYSEG), Rochester Gas and Electric (RG&E) and National Grid. NYSEG provides electricity service in Seneca and Yates counties and in parts of Wayne, Ontario, Livingston and Wyoming counties. RG&E provides electricity service in parts of Monroe, Livingston, Wayne and Ontario counties. National Grid provides electricity service for all of Genesee and Orleans

counties and parts of Livingston, Monroe, Ontario and Wyoming counties. Where natural gas service is available in the nine-county Region, service is provided by either RG&E or NYSEG.

The Genesee-Finger Lakes Region is also home to one nuclear power plant, the Robert E. Ginna Nuclear Power Plant in Wayne County. The geographic location of the Region above the Marcellus Shale and Utica Shale natural gas fields offers a potentially significant source of energy and economic development for the Region, although potential environmental concerns regarding extraction remain.

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 NYSEG/RG&E 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. NYSEG and RG&E offer a variety of non-rate programs to assist businesses in their expansion and/or relocation. These programs include, but are not limited to, incentives for: brownfield/building redevelopment; utility infrastructure investment; capital investment; agriculture capital investment; and gas infrastructure investment. Additional business energy efficiency assistance is provided through a partnership with New York State Energy Research and Development Authority (NYSERDA).

Each of 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 areas. For more details regarding these programs, please visit www.lookupstateny.com.

National Grid- National Grid provides electric service within the Genesee-Finger Lakes Region to all of Genesee and Orleans Counties as well as to sections of Livingston, Monroe, and Wyoming Counties. National Grid administers several economic development incentive programs to encourage business attraction, expansion and retention in the company's service territory for target industries, as well as agricultural businesses. Incentives include support for electric infrastructure, business productivity and power quality. In addition, National Grid also administers economic development programs that encourage sustainable "smart growth" in communities through the Brownfield Redevelopment Assistance Program and Main Street Revitalization Program. In fact, since 2003 the grant programs have provided over \$55 million in funding and played a role in the creation or retention of over 27,000 jobs in the company's New York territory. 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. Moreover, energy delivery discounts are also available to encourage target industries to expand or relocate in New York State. Additional information regarding these and other National Grid economic development programs are available online at <http://www.shovelready.com/>.

4.6.c.ii Alternative Energy

Alternative energy remains a priority within the Genesee-Finger Lakes Region. A multitude of projects are already underway utilizing various sources of energy including wind; hydrogen; ethanol; and methane. The alternative energy cluster within the Genesee-Finger Lakes Region is strong for multiple reasons including: strong background 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 4.3e.

Wind energy and the development of wind turbines remains a focus for several counties 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 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 wind projects viable.

There are also several active alternative energy projects in the Region. These projects include the ethanol plant in the Town of Shelby, Orleans County, which 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 landfills for power generation. Also ongoing is the development of the Wayne Industrial Sustainability Park, which offers cogeneration and distribution of thermal and wind generated power to industries as a way to attract and retain jobs.

4.6.c.iii Green Building

Many businesses and organizations within the Region are also taking further steps toward being environmentally friendly. There are 113 LEED-certified projects in the Region including the Medical Arts Building, Strong National Museum of Play, Golisano Institute for Sustainability, Frito-Lay Service Center, Monroe County Crime Lab, and Monroe Community College PAC Center, all located 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, Wayne-Finger Lakes BOCES in the Town of Williamson, Montezuma Audubon Center in the Town of Savannah, and Red Tail Ridge Winery in the Village of Penn Yan.

4.6.d Water

Residents in the Genesee-Finger Lakes Region are fortunate to have access to clean and plentiful water supplies, as well as excellent treatment and conveyance systems to deliver those supplies efficiently to homes and businesses. The largest single water treatment supplier in the Region is the Monroe County Water Authority (MCWA) based in Rochester. The MCWA serves approximately 725,000 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 approximately 56 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 \$2.66/1,000 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 twelve 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*. Fifty 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 Genesee-Finger Lakes 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 Genesee-Finger Lakes Region.¹⁸ 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.

4.7 Agriculture

Agriculture plays a significant role within the economy of the Genesee-Finger Lakes Region. The sector not only directly employed more than 6,000 individuals within the Region, but also contributed over 1.6 billion in cash receipts for the year 2012¹⁹. There are also a variety of indirect economic development programs and activities related to agriculture that are currently in progress or that have been recently completed.

Some of these success stories include the Alpina Foods yogurt manufacturing plant and the Mueller Quaker Dairy Farm at the Genesee Valley Agri-Business Park; the Cornell Agriculture and Food Technology Park; and the work being done through Foodlink and the Finger Lakes Food Processing Cluster Initiative. Work is also on going towards the development of the Agriculture Center of Excellence in Wyoming County, which aims to increase collaborating and spur growth in the dairy industry. Additionally, the Genesee/Finger Lakes Regional Planning

¹⁸ http://www.dec.ny.gov/docs/water_pdf/descdata2004.pdf

¹⁹ 2012 United States Census of Agriculture

Council recently submitted an application through the New York State CFA process, on behalf of the nine-county Region, to establish a revolving loan fund program to help fund regional agriculture projects.

Within the Region, the agriculture sector continues to work towards diversifying and increasing the value of agriculture and food products; gaining access to new markets; providing incentives and resources to create and expand the food supply chain in the Region; developing partnerships with academia and private businesses to increase production and efficiencies; and to invest in projects that establish a synergy between agriculture and green energy²⁰.

4.8 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. Current and former BOA projects in the Region include areas in the City of Batavia, City of Geneva, City of Rochester, Towns of Penfield/Irondequoit, Village of Holley, Village of Macedon, and the Village of Perry.

The Regional Engagement project currently being conducted by the Genesee/Finger Lakes Regional Planning Council is funded through the BOA program and will help to assess areas through the nine county Genesee-Finger Lakes Region that are affected by concentrations of brownfields and economic distress. More information about the Regional Engagement project is available in section 2.3.g.

Brownfield redevelopment is also occurring within the Region outside of the BOA program. The City of Rochester maintains a brownfield revolving loan fund to address brownfield redevelopment within the City of Rochester and is currently involved with multiple brownfield projects. Livingston County is involved with three brownfield projects, each of which is located within the Village of Dansville. Remediation efforts are also continuing within Monroe County on 22 New York State DEC projects with the City of Rochester and several other municipalities. Within Ontario County two New York State DEC projects are underway, one within the Village of Victor and one within the City of Geneva. Orleans County is involved in an environmental remediation for a brownfield project within the Village of Albion.

²⁰ <http://regionalcouncils.ny.gov/sites/default/files/regions/fingerlakes/flredc-2014-06-25-workgroup-presentation.pdf>

Seneca County is involved in cleanup programs for two brownfield sites within the Town of Waterloo. Wayne County is involved in six cleanup projects within the Villages of Lyons, Palmyra, Macedon, Newark, and Clyde.

Wyoming County is working with the New York State Department of Environmental Conservation under the voluntary cleanup program for the Wyoming County Fire Training Center. Yates County is involved in a New York State DEC cleanup project at the former NYSEG Site in the Village of Penn Yan.

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.

4.9 New York State Canal System

4.9.a Erie Canalway National Heritage Corridor

The Erie Canalway National Heritage Corridor was established in the year 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 identified 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.

In 2010, a strategic plan was developed to guide the work of the Erie Canalway National Heritage Corridor Commission. The completed Strategic Plan, entitled "Erie Canalway National Heritage Corridor Strategic Plan 2011-2016" was approved in April 2011 and outlines five strategic priorities: Preserve; Promote; Inform; Sustain; and Manage including corresponding tasks identified under each priority.

In October 2014, The National Park Service listed the New York State Barge Canal on the National Register of Historic Places. The designation recognizes the New York State Canal System as a nationally significant work of early twentieth century engineering and construction that affected transportation and maritime commerce for nearly half a century.

The New York State Barge Canal National Register Historic District is remarkable in its scope and historical integrity. It spans 450 miles and includes the four branches of the state's canal system: the Erie, Champlain, Oswego, and Cayuga-Seneca canals– all much enlarged versions of waterways that were initially constructed during the 1820s. The nomination evaluated 791 features and included 552 contributing structures and buildings.

The Erie Canalway National Heritage Corridor also continues its day to day activities which include: conserving natural resources; promoting recreation; interpretation and orientation; tourism development and marketing; and economic revitalization. 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.

4.9.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.

Several Finger Lakes communities received funding in the last year from the New York State Canal Corporation through the Finger Lakes Regional Economic Development Council to support improvement projects to enhance and beautify the New York State Canal System. These projects include: Seneca Knitting Mill in Seneca Falls, to transform and reuse the Mill into the Center for Great Women; the Thomas Creek Wetland Walk in Fairport, to expand connections to the Canalway Trail; and the Bicentennial Pavilion in the Village of Pittsford, to construct a commemorative Pavilion along the Erie Canal waterway.

The Canal Recreationway Commission is in the process of updating its 1995 Comprehensive Plan, and is actively soliciting input in 2015. The Canal Corporation also recently commissioned a study to review the economic impact of non-tourism use of the Canal, which culminated in 2014 with the release of "New York State Canal Corporation Report on the Economic Benefits of Non -Tourism Use of the NYS Canal System." The *Report* identified an overall economic impact/revenue of non-tourism use of the Canal System at \$6.2 billion including \$775 million within the Finger Lakes Region²¹.

4.9.c Western Erie Canal Heritage Corridor

The Western Erie Canal Heritage Corridor includes the counties of Erie, Niagara, Orleans, Monroe and Wayne and is part of the larger Erie Canalway National Heritage Corridor and the New York State Heritage Area System. A Western Erie Canal Heritage Corridor Management Plan was developed and 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

²¹ <http://www.canals.ny.gov/economic-benefit-report.pdf>

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 incorporated in 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.

The municipalities of the sixteen small villages and small cities along the Western Erie Canal Heritage Corridor have been challenged by economic and physical decline of their main streets in recent years. The Main Street (NTMSC) approach advocates a return to a sense of community, local empowerment, and the rebuilding of traditional commercial districts based on their unique assets such as: distinctive architecture; a pedestrian friendly environment; personal service; and local ownership. The Village of Albion in Orleans County, Village of Lyons in Wayne County, and the City of Lockport in Niagara County were selected as the inaugural designated Western Erie Canal Main Street Communities. A comprehensive Regional Resource Guide has also been completed helping to provide an inventory of grant opportunities, organizations, and resources to assist communities with Main Street revitalization.

One project underway through a partnership of G/FLRPC, the Village of Palmyra, and the Preservation League of New York State, is the Creating Residential, Commercial and Municipal Upper Floors: A Guidebook for Regional Revitalization project. The Guidebook will be written to assist municipal officials and interested parties in rejuvenating underutilized and abandoned upper floors of buildings in mixed use areas of cities, villages and town centers throughout the Region. Workshops to train local governments and the public in the effective use of the Guidebook will also be presented after completion, which will enable communities to be proactive in resolving issues related to underutilized upper floors, and creating strategies for their revitalization.

4.10 Village Main Streets

Village main streets in the Genesee-Finger Lakes 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 currently underway is discussed below.

The City of Batavia recently completed a Brownfield Opportunity Area Nomination Study for the central corridor of the City. The Nomination Study includes an analysis and vision for the corridor along with specific recommendations and an associated strategic plan. Within Livingston County the Alliance for Business Growth, a partnership between the economic development offices of Livingston and Wyoming Counties, continues to offer assistance to small business owners in these two counties in an effort to encourage and support entrepreneurship as well as to encourage revitalization and preserve the vitality and character of Main Streets throughout each county.

The Village of Brockport, in Monroe County, received \$200,000 in funding through the New York Main Street program that will be utilized to help renovate commercial and residential renovation projects within mixed-use buildings along the Village's business district. Within Ontario County, the City of Geneva received \$200,000 in funding to renovate mixed-used buildings in downtown Geneva. In Seneca County the Village of Waterloo received a grant for \$20,000 to complete a comprehensive economic development plan for a distressed and blighted area of the Village. The Villages of Albion and Lyons, within Orleans County and Wayne County respectively, were part of the three inaugural communities selected for funding under the Western Erie Canal Main Street Program. The Perry Main Street Association, within Wyoming County, continues to be active in their efforts to revitalization Main Street within the Village. Within Yates County the Villages of Penn Yan and Dundee continue their efforts to improve community development and help attract businesses to Main Street through improving streetscapes, signage, and facades.

4.10.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 BID has worked on increasing events within the downtown to help increase the number of visitors and residents coming into the City. The BID offers matching grants for facade improvement to renovate and preserve the exterior of downtown commercial buildings. The program provides matching grants to District property owners and tenants up to \$7,500, with funding anticipated to be available in late 2014. The Batavia Business Improvement District received \$150,000 in funding through a Rural Area Revitalization Projects grant that will provide elevator access to three downtown buildings. The BID is also continuing its efforts regarding business attraction and retention within the district.

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 has also worked closely with the City of Canandaigua, which established a revolving loan fund to assist business owners with gap financing. Promotion of the District remains a key effort of the BID along with recruitment of businesses to locate into the District.

Geneva Business Improvement District-

The Geneva BID addresses programs that focus on: architectural design and preservation; economic planning and development; business recruitment and retention; and marketing and promotion. 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 and has also established a micro-enterprise loan program to help assist businesses. 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 on some of the projects, such as establishing ADA railings, has been completed. The BID also continues to work on business attraction to help fill vacancies within 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. The BID continues to work closely with economic development stakeholders including developers to identify strengths and weaknesses for business attraction and retention within the District. Rehabilitation of the district remains a strong focus as well with the BID working on façade renovations and streetscape improvements.

Williamson Business Improvement District- The Williamson BID continues to address façade improvements and streetscape work, including new benches, bike racks, and other sidewalk enhancements. The BID is also working on a downtown cleanup project and has been continuing their efforts to attract and retain businesses within the District.

4.11 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 economic impact within the Genesee-Finger Lakes Region through consumer spending on food, entertainment and lodging as well as through job creation/investment from the tourism industry.

A recent study by the Oxford Economics Company found that visitor spending in New York State in 2010 was over \$49.8 billion. 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.”²² The report analyzed secondary research and surveyed consumers interested in traveling to New York State. Their findings show the importance of branding and the successful recognition that both the Finger Lakes Region and the Finger Lakes wine trail, have achieved, and can help the Region become more efficient with their marketing dollars. There are many significant tourist attractions within the Genesee-Finger Lakes Region including: Letchworth State Park; Darien Lake; the Finger Lakes; the Erie Canal; the City of Rochester; local wineries; hiking, fishing and other outdoor activities; and the many town and village events and festivals held throughout the Region.

With funding limitations at many of the Region’s tourism promotion agencies, many are looking to increase regional collaboration to help improve the efficiency of tourism marketing within the Region. The tourism promotion agencies are also finding more and more creative ways to promote the region including utilizing social media, such as Facebook and Twitter, to help promote the Region.

²² <http://fallgetaways.iloveny.com/cornellreport/>

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

As part of the development of *Accelerating Our Transformation: Year 5*²³ a Strategic Plan developed under the New York State Finger Lakes Regional Economic Development Council, the Genesee-Finger Lakes Region identified 36 economic development projects within 12 subject areas as “Transformative Priority Projects”. Through the Consolidated Funding Application (CFA) process each of these projects competed statewide for funding made available from a multitude of state agencies, award announcements are expected in fall 2015. While any potential funding awards will help advance each of the projects, in many cases additional funding will be needed in order for the projects to be fully completed. While many of the projects are not eligible to receive funding from EDA, they remain a critical component of the Region’s economic development efforts and help to place into context the individual county priority projects listed in sections 5.2 through 5.10. For those projects that are eligible for EDA assistance, New York State grant assistance can be utilized to help fulfill the matching requirements of EDA funding and together help leverage additional economic development funding for the Region.

The “Transformative Priority Projects” identified within *Accelerating Our Transformation: Year 5* are discussed below.

The Community Development workgroup identified 6 projects that will help create mixed use developments, restore historic structures, improvement quality of life, reinvigorate the urban core, and create focal points of investment, housing, business, and tourism-related activity. These projects include: renovation of Rochester Convention Center; renovation of the Sibley Buildings; creation of public space at Metropolitan Square; the Pinnacle North development project in Canandaigua; restoration of the Bents Opera House in Orleans County, and the CityGate mixed-use development in the City of Rochester.

Research and Development projects identified as Transformative Priority Projects include new investments in academic research and development at the University of Rochester Goergen Institute for Data Science and the Additive Manufacturing Center at RIT.

Identified Transformative Priority Projects in the area of Energy Innovation include investments in Cadenza Innovations and NOHMs Technologies and the NY-BEST Test and Commercialization Center each of which is located at Eastman Business Park.

In the areas of Optics, Imaging and Photonics and Research and Development, projects identified include: a shared use facility for the Rochester Regional Photonics Cluster and an expansion of the Kingsbury touchscreen manufacturing facility at Eastman Business Park.

²³ <http://regionalcouncils.ny.gov/themes/nyopenrc/rc-files/fingerlakes/FLREDC-2014PR.pdf>

Agriculture & Food Processing Projects include: renovation and expansion of Cornell University's Agriculture Food and Technology Park; New York State Agricultural Experiment Station; LeRoy Agriculture and Food Technology Park; Genesee Valley Agri-Business Park; Medina Business Park; and an expansion project at Marquart Brothers in Wyoming County.

The Tourism and the Arts workgroup identified three projects aimed at enhancing the quality of life within the Region and to attract increase tourism. These projects include: Eastman School of Music renovations; Seneca Park Zoo expansion and renovation; and a new inn at Bristol Mountain Winter Resort.

The Science Technology and Advanced Manufacturing Park in Genesee County was identified as the Transformative Priority Project in the area of Industrial Development and the Unither Pharmaceuticals was identified as the Transformative Priority Project in the area of Life Sciences.

Higher Education & Workforce Development projects that were identified included: Roberts Wesleyan College's Smith Science Center; St John Fisher College's Wegmans School of Pharmacy; Keuka College's Center for Business Analytics and Health Informatics; along with Monroe Community College's Applied Technologies Center; Middle Skills Advanced Manufacturing Secondary Education; and the Regional Veterans Service Center. Each of these projects will help improve the capability of the Region to meet the need for skilled workers within the Region.

The Transportation & Infrastructure workgroup identified the Seneca County Route 318 Sewer Expansion and the Dresden Power Plant Gas Conversion as Transformative Priority Projects. Development of incubator space at Keuka Business Park was identified as a Transformative Priority Project through the Entrepreneurship and Innovation workgroup.

Also identified within the Finger Lakes Regional Economic Development Council Strategic Plan entitled: *Accelerating Our Transformation: Year 5*, are projects to enhance the Opportunity Agenda plan. These projects include the Community Entrepreneurship Trailing and Micro Loan Program, the expansion of the Boys & Girls Club of Rochester, and expansion of the Foodlink Food Hub.

5.2 Genesee County

Genesee County's competitive strengths include its strategic location, with easy commute distances from Rochester and Buffalo and close proximity to Syracuse and the Southern Ontario Canadian Region, including the City of Toronto. Genesee County has outstanding highway and air access which includes three interchange exits within the County located along one of the state's most active commercial highways, the New York State Thruway (I-90). Additional key competitive strengths of Genesee County and the Batavia Micropolitan area include an ample and well educated workforce as well as abundant and cost effective real estate including five shovel-ready corporate/tech oriented industrial parks.

One such park is the 250 acre Genesee Valley Agri-Business Park, a one of a kind Agri-Business and Food Processing Park focused on attracting food processing and related companies to the site. In 2016 the goal is to extend the existing infrastructure along the newly constructed access road.

Development efforts continue at the 67 acre Buffalo East Technology Park located directly off the Pembroke Exit of the New York State Thruway I-90 at the intersection of State Routes 5 & 77, in the Town of Pembroke. Attraction efforts are aimed at High Tech, Clean Tech and IT companies given its strategic location, not only along the New York State Thruway, but also within the New York Power Authority's Niagara Hydro-Power Zone offering high capacity low cost electric to companies. In the fall of 2013 the GGLDC completed the rezoning and the environmental review (SEQR) of the BETP to support advanced manufacturing. On site sewer completed in spring 2014 and was connected to the newly constructed Town of Pembroke sewer system. In the spring of 2015 Yancey's Fancy completed construction of their 112,000 square foot expansion of their food processing facilities.

Another strategic industrial park located within Genesee County is the Western New York Science and Technology Advanced Manufacturing Park (WNY STAMP). WNY STAMP is a 1,250 acre Mega-Site located in the Town of Alabama, focused on the attraction of high technology/clean technology and nano-technology companies. At full build-out the site has the potential to employ up to 10,000 workers and could be home to companies manufacturing photovoltaic cells, semiconductors, or flat panel displays. In 2015 the activities included land acquisition; infrastructure engineering and permitting along with a Systems Interconnect Study (SIS) for electric service at the site.

There are also two additional industrial parks within Genesee County that are shovel-ready: Gateway II Corporate Park and Apple Tree Acres Corporate Park. Gateway II Corporate Park is a 57 acre park located in the Town of Batavia focused on distribution, warehouse, and light manufacturing and is currently home to Ashley Furniture. Apple Tree Acres Corporate Park is a 185 acre park located in the Village of Bergen, focused on select retail, light manufacturing, and distribution companies.

The Genesee County Economic Development Center (GCEDC) is also working closely with the Town and Village of LeRoy on the development of a 75 acre shovel-ready development project known as the LeRoy Food and Technology Park. The project is located on NYS Route 19 at the Village line, and only 3 miles from the LeRoy 1-490/I-90 interchange, and offers excellent access to utilities including electric, public water, and sewer. Full build out of the site has the potential to create up to 1,000 jobs with approximately 228 being created within 5 years of project completion. The LeRoy Food and Technology Park is a cornerstone of the revitalization strategy to bring back jobs, economic growth and tax base in the Town and Village of LeRoy.

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. Focus areas include agriculture and food processing; high-tech; clean-tech; life sciences; advanced manufacturing; and distribution and warehousing. Emerging industry clusters, including medical technology companies, have also been targeted to help establish a new economic base for the community.

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. 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.

This strategy has helped foster 397 project "wins" generating capital investment commitments of nearly \$923 million and job creation commitments of 3,992 jobs since 2003. The Genesee County Economic Development Center (GCEDC) also remains active in economic development and marketing programs, including business retention and expansion programs and business attraction programs. The GCEDC also continues to support small business, start-ups, and incubators within the county including the recent completion of the Upstate MedTech Centre, a 43,000 square foot facility located across the street from Genesee Community College. GCEDC continues to market the space available at the Centre and the shovel-ready acreage available at the Upstate Med & Tech Park as a life-cycle solution for young entrepreneurial firms as they develop in the community.

Workforce development continues to be an integral part of the GCEDC economic development strategy. The Genesee County Economic Development Center (GCEDC) has continuously worked to align development priorities with county education and training providers. In conjunction with Genesee Community College (GCC), in the spring of 2015, a non-credit Introductory and Advanced Mechatronics program was piloted. The GCEDC also wrote, submitted, and was awarded a \$219,424 grant for county educational institutions to purchase equipment that would support programs in advanced manufacturing, food processing, and technology. The three beneficiaries were the Genesee Valley Educational Partnership, the Western New York Tech Academy and GCC. Efforts to provide the workforce necessary to support the STAMP initiative, saw the GCEDC work with GCC and its' eastern and western community college counterparts on the future delivery of both credit and non-credit programs in nano technology. The vision for all of these and other workforce initiatives has been to meet the immediate and long term needs of local companies, for their growth, and the needs of companies the County is looking to attract.

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

Table 24- Genesee County Priorities

| Priority Number | Proposed Project | Lead Agency on project | Total Funding and Sources | # of jobs projected to be created |
|-----------------|--|---|---|-----------------------------------|
| G-1 | Develop Mega-Site High Tech/Clean Tech Advanced Manufacturing Park (WNY STAMP) | GCEDC/ GGLDC | \$150-\$225 Million Federal, State, Local | 9,300 |
| G-2 | Genesee Valley Agribusiness Park (250 acres) | GCEDC/ GGLDC | \$10 Million Federal, State, Local, Private | 1,200 |
| G-3 | LeRoy Food & Technology Park | GCEDC/Town of LeRoy | \$2.1 Million State, Local | 1,000 |
| G-4 | 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-5 | Buffalo East Technology Park (67 acres) | GCEDC/ GGLDC | \$2.0 Million+ Federal, State, Local, Private | 500 |
| G-6 | Batavia Opportunity Area (BOA) plan to advance redevelopment of strategic sites in the City of Batavia. (350 acre) redevelopment plan for underutilized, vacant, abandoned or contaminated brownfield properties in the City of Batavia. | Batavia Development Corporation/GCEDC/ GGLDC | \$5.0+ Million Federal, State, Local | Indirect |
| G-7 | Develop Lower Cost of Power Solution(s): Cogeneration, Alternative Energy to lower power costs businesses | GCEDC/ GGLDC | \$1 Million Federal, State, Local | Indirect |
| G-8 | 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 focus on the retention and expansion of existing firms, the attraction of new firms, entrepreneurship, small business development and agri-business. The County's economy is balanced among manufacturing, the public/non-profit sector, agribusiness and commutation to Monroe and surrounding counties. This last factor 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.

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 Foods, New York Bean, Once Again Nut Butter, Archer Daniel Midland (ADM), Sweeteners Plus and Seneca Foods.

Kraft, Livingston County's second largest private sector employer continues production of *Lunchables* and *Cool Whip*. Barilla has planned a small addition to their pasta manufacturing facility as the plant has exceeded its production capacity. Livingston County also is the location of the western hemisphere's largest rock salt mine operated by locally-owned American Rock Salt Company. American Rock Salt (ARS) directly employs 275-350 employees subject to significant seasonal fluctuations²⁴. ARS has acquired a salt bagging operation from out of state and expanding its bagging operations at their Retsof location.

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. Livingston County Development, comprised of the County's Economic Development Office, Industrial Development Agency and Local Development Corporation, continues to utilize its website to promote available sites and buildings for potential tenants/buyers (www.livingstoncountydevelopment.com). The web site and sites & buildings inventory has been updated.

Agriculture and related agribusiness comprise a large and growing sector of the County's economy. In particular, the dairy industry has grown in both acreage and herd size and management consolidations are occurring. In 2006, Livingston County completed its Agriculture and Farmland Protection Plan that identified objectives and tactics to strengthen agricultural development. Economic development objectives within the Plan include: 1) development of an agribusiness retention, expansion and attraction plan; 2) enhancement of business development programs to more fully incorporate agricultural needs; 3) expansion of education and training

²⁴ 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.

programs; 4) creation of an outreach and public relations program; and, 5) development of a regulatory and policy action program.

Agriculture and Agri-business supply chain firms continue to expand and locate in Livingston County. Land-O'Lakes Inc. operates the 60,000 square foot Commodity Resource Corporation (CRC) facility, a multi-modal feed and fertilizer transload facility located in Caledonia. The Town of Caledonia has designated this area of the community to be marketed for further industrial development. Several years ago, Perdue established its first location in New York State in the Town of Livonia with the purchase of the former Lakeville Transfer/PACMA facility. This facility has now nearly tripled in size.

WNY Enterprise opened a new 12,000 square foot milk separation facility in the Town on York providing value added milk to regional yogurt, cheese and ice cream manufacturers. Additional growth at the facility is anticipated.

Livingston County business assistance programs include, but are not limited to a revolving loan fund, industrial revenue bond financing, training, payment in lieu of property taxes (PILOT), and sales tax abatement on equipment purchases.

A feasibility study for the Livonia Gateway Project, a proposed road from NYS Route 15 to Bronson Hill Road in the Town of Livonia, is underway. The study was funded by Empire State Development. The road will address increased truck traffic generated by the Perdue facility and existing businesses in the area. Additionally, the Town has designated the Gateway Project area in its 2004 Comprehensive Master Plan for further industrial and commercial development. The Livingston County Offices of Economic Development and Planning are working with the Town of Livonia and the landowners group to facilitate the construction of the road.

Livingston County Development directly assists new and expanding small businesses in targeted downtown areas throughout the County. Technical assistance along with sign and façade improvement grants are provided by the Livingston County Development Corporation for downtown revitalization in all of Livingston County's 9 Villages. Grant awards have been successfully implemented via funding through the New York Main Street program in the Villages of Avon, Dansville, Geneseo, Lima, Mt. Morris and Nunda. The funding helps to restore downtown buildings.

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 Avon, Caledonia, Dansville, Geneseo, Lima, Livonia, Mt. Morris and Nunda to enable business and property owners to apply for grant funding under the County's Sign and Façade Improvement Program. The funding encourages new signage and façade renovations in the central business districts.

Small business and business startup provide a significant portion of growth in Livingston County. To assist in the development of small business in the county, the Livingston County

Development Corporation operates a microenterprise revolving loan fund to assist new and expanding qualified businesses.

Using Federal ARRA funds, the County contracted with SUNY Geneseo to perform an Outflow Study to identify the goods and services that are currently being purchased outside of the County. The study modeled the economic impact on Livingston County if 10% of the purchases currently made outside of the County were instead purchased locally and found that more than 100 new jobs could be created. Using the study's findings, the County developed and implemented a comprehensive Buy Local campaign utilizing traditional advertising media, social media, a dedicated web site (www.itsinlivingston.com) and focus groups made up of merchants and customers. This program started in 2011 and continues in partnership with the Livingston County Chamber of Commerce.

Financing is currently being sought for a multi-tenant building within Livingston County. Livingston County Development, together with SUNY Geneseo and its Small Business Development Center, intends to complete a study to determine the feasibility of an incubator facility as well as identify potential funding sources. The establishment of this facility continues to be a top priority for Livingston County.

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. Genesee Community College also operates campus center locations in Dansville and Lima.

RTS Livingston, 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 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. The project examined the existing transportation network and provided recommendations for improving the 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 2009 opening of Livingston County's Center for Nursing and Rehabilitation, a 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. An outpatient Kidney Dialysis Center in Geneseo serves county residents in need of dialysis services. 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 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.

Tourism is a key aspect of the County's economy. Letchworth State Park is one of the region's crown jewels. The park's stunning scenery, gorges, miles of trails, swimming pools and facilities make it a perfect destination. Photographers, families and outdoor enthusiasts enjoy this year-round vacation spot.

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

| Table 25- 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 Poags Hole Rd. Development, Dansville | Livingston County | \$1 million EDA, DOT, County | 250 |
| L-3 | Multi-Tenant building at Dansville Industrial Park | Livingston County IDA | \$2 million EDA, New York State, County, Private | 25 |
| 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 |
| L-8 | Multi-Tenant building at Avon Crossroads Commerce Park | Livingston County IDA | \$2 million EDA, New York State, County, Private | 50 |
| L-9 | Incubator Feasibility Study | Livingston County | \$50,000 New York State, County | Indirect |
| L-10 | Expansion of infrastructure in the Town of York | Town of York | \$9,000,000 State, Local, Regional & Federal | Indirect |
| L-11 | Gateway Park infrastructure in the Town of Livonia | Town of Livonia | TBD | 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 have incentive programs to reward small and medium sized businesses for investing in equipment and creating jobs within the County. Incentives range from interest rate reductions to rebates on equipment purchases and property tax abatement.

Monroe County 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. Monroe County also continues to work closely with the City of Rochester, Greater Rochester Enterprise, Empire State Development and other economic development partners on business attraction and retention efforts within the County.

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 2016-2021 Monroe County Capital Improvement Program 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, employers and residents on agricultural land use and commerce issues, and to provide education and training in agriculture.

To prepare potential employees for a career and advancement, MCC offers a certificate in Agriculture and Food Studies. The certificate courses prepare students with fundamental knowledge and skills required to succeed in the agricultural and food-related industry — from farm to fork. Specific skills addressed include food quality, food safety, supervision, communication, inventory management, documentation, team skills, and problem-solving. The certificate is offered as both a two- and four-semester course sequence (24 total credits) with many of the courses offered online and in the classroom.

The economic impact of agriculture within Monroe County is significant with a total production value in 2009 of over \$73 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 with the goal to explore new opportunities to enhance the County’s use of renewable forms of energy to benefit both the County and the environment as well as 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 Gas-to-Energy Project, which will take advantage of the available methane gas being produced at the Mill Seat Landfill.

In 2004, it was determined that there was enough methane gas being generated to produce 4,800 kilo-watts (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 July 2016.

Currently there are 140 acres of County of Monroe Industrial Development Agency (COMIDA)-owned, developable property adjacent to the landfill on Brew Road that would be suitable for economic development. COMIDA will use the 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. Monroe 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 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 is one of Upstate New York's fastest growing initiatives designed to bolster both **new ventures** (early stage technology; life sciences) *and* **established firms** (high-revenue potential family-owned and/or ownership transitioning.)

Since 2006, more than 250 entrepreneurs have completed the four month program series. TEN offers exclusive, members-only boot camps, significant hands-on exposure to, and interaction with, national and regional business experts and funding sources as well as leadership and business strategy for today's complex, competitive environment.

TEN alumni were surveyed in 2012 and the results demonstrated their competitive advantage: winning government grants and contracts; increasing revenues and profitability by retooling sales and marketing strategies; and securing equity financing and economic development assistance. More than half of the respondents reported they had increased employment with nine percent reporting ten or more new jobs. Twenty-three percent reported they had secured \$250,000 or more in funding and sixteen percent reported that their revenues now exceeded \$5 million.

TEN provides significant opportunity to entrepreneurs commercializing innovative, world-class technology. TEN's economic development strategy is to increase investments and jobs in Upstate New York by selecting and supporting startups and small businesses with the greatest potential for building profitable, scalable and sustainable ventures.

Eastman Business Park

Maintenance and expansion of the Eastman Business Park was identified as a top priority by the Finger Lakes Economic Development Council and also remains an economic development priority for both Monroe County and the City of Rochester. Two particular areas of focus at the park: sanitary sewers and natural gas supply are discussed below.

Eastman Business Park has a sanitary sewer system that connects most of the 120 buildings at the park to the Monroe County municipal system. The sewer system within the 1250 acre park is the property of Kodak, which then conveys waste through the park to county connection points at the perimeter. In order to connect the buildings to the system, the sewers need to be dedicated to Monroe County, as Kodak is not permitted to operate as a sewer district. For Monroe County to

take ownership, they are requiring the sewers be upgraded and repaired to their standard.

There are five parcels in Eastman Business Park, and from west to east are labeled S, M, X, W and E. Section S was upgraded and dedicated to the County in 2009; Section M is currently being upgraded at a cost of approximately \$1.3M, with completion and dedication planned by year end. The remaining three sections, X, W, E, have been surveyed with repairs estimated at \$3M to upgrade to County standards for acceptance. Kodak is unable to sell buildings connected to the sanitary sewers in these three sections until these are upgraded.

Kodak utilities operation and several other operations (Kodak and Non-Kodak) use natural gas supplied to Eastman Business Park. Natural gas usage at Eastman Business Park is expected to dramatically increase starting in 2014-2015 due to the conversion of coal fired boilers to natural gas boilers as part of an industrial power plant upgrade to comply with the clean air act. While the exact compliance strategy is still being designed, even the base case design requires natural gas supply above the current RG&E line capacity. In the mid to highest usage cases, a new, high pressure gas line will likely need to be constructed from the NYS Thruway header system to Eastman Business Park. Supply options are being investigated by RG&E/NYSEG to determine what needs to be completed and how much it will cost. Preliminary estimates are \$1M - \$2M per mile, with a distance of 10-15 miles.

Monroe County's priority projects are listed in Table 26.

| Table 26- Monroe County Priorities | | | | |
|---|--------------------------------|--|---|-----------------------------------|
| Priority Number | Proposed Project | Lead Agency on project | Total Funding and Sources | # of jobs projected to be created |
| M-1 | Mill Seat Landfill Bioreactor | Monroe County DES | \$12,000,000 Federal, State, County | 75 |
| M-2 | The Entrepreneurs Network | Monroe County Department of Planning and Development | \$300,000 Federal, County | 150 |
| M-3 | Eastman Business Park Upgrades | Monroe County, City of Rochester | \$13,000,000+ Federal, County, Local | TBD |

5.5 City of Rochester

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

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

Midtown Rising

In partnership with the State of New York, the City of Rochester is moving forward with the revitalization of the former 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 Midtown Rising project involves the demolition of most of the Midtown buildings, inclusion of new streets and open space and creation of 6 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 is complete. The remediation and demolition phase was funded by the State of New York at a cost of \$44 million. Construction work will be under way this year in the underground service tunnel and 1,800-vehicle underground garage. Above ground, a new street grid; sidewalks; and lighting are planned along with the preparation of the remaining development parcels and the public space with an additional \$11 million grant from New York State.

The City of Rochester has currently identified \$4,712,350 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. The City was awarded a \$2,057,850 grant from the U.S. Economic Development Administration for infrastructure improvements to the Midtown site. The City continues to seek assistance through

various federal programs to assist with infrastructure costs to construct streets, utilities and open space.

PAETEC was originally planning on constructing a 224,000 square foot corporate headquarters office building at the northwest corner of the former Midtown Plaza site. In the meantime, the Windstream Corporation and PAETEC, both public-held corporations, entered into an agreement whereby Windstream agreed to purchase PAETEC with no stipulations for advancing the PAETEC corporate headquarters on the Midtown site. Windstream subsequently agreed to locate up to 335 of its employees on a portion of the same site. The reconfigured project involves the adaptive re-use of the former Seneca Building at 245 East Main Street at a total cost of \$19 million. The Pike Development Company will develop and own the approximately 109,000 square foot, three story structure; two floors will be occupied by the Windstream Corporation, and the third floor will be available for other tenants. Construction started in spring 2012 and will be completed by August 2013. The City of Rochester is providing a \$5,000,000 loan and a \$900,000 grant from federal Community Development Block Grant (CDBG) funds; the City is also providing a \$1,700,000 grant with Empire State Development Corporation (ESDC) funds. Rochester Gas & Electric (RG&E) helped close the financial gap with an \$800,000 grant for electric service infrastructure. The balance of funding will be developer equity and conventional financing.

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 150 apartments, 61 condominiums, and approximately 100,000 square feet of commercial space. The developer is seeking state and federal assistance for project financing.

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 phased redevelopment of the 30 acre Port site through the combination of a new 157 slip public 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 30 acre site is estimated at \$32 million. The City has completed preliminary design and SEQR review including an Environmental Impact Statement. Final design and regulatory permitting are underway for the project. Approximately \$7.0 million in

NYS multi-modal transportation, NYS Environmental Protection Fund (Department of State), federal boater infrastructure grant program and federal Intelligent Transportation System funding has been secured for the Port redevelopment.

The City has initiated design, regulatory permitting and issued the Draft Environmental Impact Statement for public comment in October 2011 for the project. Approximately \$6.2 million in NYS multi-modal transportation, NYS Environmental Protection Fund (Department of State), and federal Intelligent Transportation System, and USFWS BIG II funding has been secured for the Port redevelopment.

Projected private investment over a three to ten year period, beginning as early as 2013, 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 (DEC). In addition, during 2007, the City was approved for a \$200,000 USEPA brownfield cleanup grant for the Photech site.

The City selected a consultant for the cleanup. The cleanup began in the winter of 2010; 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. Documents were submitted to the NY State DEC in December 2013 so that the Certificate of Completion may be completed. The City rough graded in April before the contractor leaves, and then later under a separate contract plan to install some interim drainage controls to ensure the site drains. The City hydro-seeded the whole site this spring unofficially turning the Photech site from a brownfield into a greenfield.

It is anticipated that the former Photech site will be redeveloped as an industrial park, which will subsequently stimulate private sector investment and economic development. Redevelopment as an industrial park will require City expenditures for design, grading, utilities and public road improvements, and related infrastructure. The City has received a \$700,000 grant from the Economic Development Agency (EDA) Public Works grant program to support public infrastructure development on the site and the project has been selected by EDA for further consideration for funding. The project has since undergone final design.

Estimated costs for the potential new investment in the redevelopment of the Phototech site are approximately \$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 Phototech Site will result in the creation of 200 to 250 new jobs. Within 2012 miscellaneous post-cleanup environmental work will be completed and a remedial construction report will be submitted to NYSDEC.

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. The planning project began in April 2011 and the BOA nomination study and master plan is expected to be completed in the fall of 2012. This \$212,000 grant funds 90% of the costs of studies and the development of redevelopment plans for the former refinery site and the surrounding area. Exxon Mobil, the successor company to the original refinery company, has signed a stipulation agreement with the New York Department of Environmental Conservation and has completed a site investigation of a portion of the former landfill. Significant planning, design, cleanup and infrastructure investment will likely be needed to redevelop this large riverfront site. The City is currently constructing a conversion of 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 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 will be needed in order to maximize the economic and community redevelopment potential of the site.

Eastman Business Park

Maintenance and expansion of the Eastman Business Park was identified as a top priority by the Finger Lakes Economic Development Council and also remains an economic development priority for both Monroe County and the City of Rochester. Details of the project are discussed in section 5.4, in the Monroe County narrative.

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 and will begin late in 2012. The redevelopment site plan and subdivision process could begin in approximately 12 to 18 months.

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

| Table 27- City of Rochester Priorities | | | | |
|---|------------------------------|---------------------------------|---|-----------------------------------|
| Priority Number | Proposed Project | Lead Agency on project | Total Project Cost and Funding Sources | # of jobs projected to be created |
| R-1 | Midtown Plaza | City of Rochester | \$184 Million NYS, HUD 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 | Emerson Street landfill area | City of Rochester | TBD Local, State, EDA | TBD |
| R-6 | Eastman Business Park | Monroe County/City of Rochester | \$13 million + State, Federal, Local | TBD |

5.6 Ontario County

Every five years, the Ontario County Office of Economic Development/Industrial Development Agency (OED/IDA) completes an update to the Ontario County, NY Technology-Led Economic Development Strategy. The economic development strategy evaluates the state of the County and focuses on the development of a strategic approach. This plan is being updated again in 2015.

The 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 stabilize and grow the technology parks (the Cornell Agriculture and Food Technology Park and the SUNY Polytechnic Institute's Smart System Technology and Commercialization Center (STC)); continue to develop the open access

fiber optic ring; and continue to improve the reliability of electricity through “smart grid” implementation.

Internal harvesting and talent recommendations include improving business to business opportunities; cultivating entrepreneurs; and continue technical-based training for incumbent workers. Ontario County Economic Development works closely with Finger Lakes Community College to develop and innovate employer-driven programs such as the Advanced Manufacturing degree, Mechatronic Technology certificate, Instrumentation and Control degree, and Viticulture degree.

Investment and teamwork recommendations include the development and promotion of key sites; and tying into federal, state, and regional foreign direct investment programming and regional attraction efforts. Ontario County Economic Development has worked closely with STC to develop a shovel-ready campus for companies to expand there.

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, the Cornell/NYS Agriculture Experiment Station, and Cornell Cooperative Extension on these and other agricultural food/beverage technology efforts.

Infrastructure upgrades remain a key priority throughout Ontario County. Canandaigua Airport is expanded its runway to 5,500 feet to accommodate larger airplanes. The Canandaigua Airport, in order to facilitate economic development, needs sewer service. Sewer installation efforts are also underway at two business parks. Another key site is Fisher’s Ridge in Victor. This is a planned unit development on 125 acres of rolling hills. It is strategically located between Interstate 90 and State Route 96. It will be a mixed-use development which needs extensive infrastructure development.

Cornell Agriculture and Food Technology Park

One project is the Cornell Agriculture and Food Technology Park in the City of Geneva. The 70+ acre tech park is located adjacent to the Cornell/NYS Agricultural Experiment Station. Incubator services for startups, classroom space, food laboratory, 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. The Tech Farm is now home to ten companies in a variety of enterprises. With the center currently at 100% 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 operations, distribution functions and to allow the Tech Farm to be utilized, as intended, for the incubations and commercialization of agriculture and food/beverage businesses.

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 completed the construction of a 9,000 square foot viticulture education building at the Park that will help train and educate local employees for careers in grape and wine-related occupations. The following development initiative has been targeted by the Cornell Agriculture and Food Technology Park:

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 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.

Smart System Technology & Commercialization Center of Excellence (STC)

The Smart System Technology & Commercialization Center of Excellence (STC) is managed and supported by SUNY Polytechnic Institute (formerly SUNY College of Nanoscale Science and Engineering and SUNYIT). 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.

In support of Governor Cuomo's ongoing strategy to drive nanotechnology –based economic development across New York State, SUNY Poly's STC offers the largest array of world-class MEMS-related solutions in the industry, all under one roof. STC maintains a 130,000-square-foot, state-of-the-art facility that includes over 35,000 square feet of certified clean room space with 150mm and 200mm wafer production, complemented by a dedicated 8,000-square-foot MEMS and optoelectronic packaging facility. The Center is also the only commercial "Trusted

Foundry” source for MEMS integration in for the U.S. Department of Defense program for Defense Microelectronics Activity (DMEA). The facility is also a trusted supplier for packaging, assembly, and aggregation services.

SUNY Poly is the first college in the world dedicated to research, development, education, and deployment in the emerging disciplines of nanoscience, nanoengineering, nanobioscience, and nanoeconomics. It 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.

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 stage 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 are 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.

In 2007, STC was awarded a \$3 million grant through the U.S. Economic Development administration to expand regional resources in cleanroom infrastructure and MEMS fabrication capabilities. This project has been completed. At this time, STC, with the aid of Ontario County Local Development Corp., is developing its 57-acre site as a “shovel ready” campus in support of nanotechnology and semi-conductor industries. The campus is pre-approved for construction of an additional 793,000 square feet. This will allow STC the ability to market its sites to firms that work in complementary industries so they can physically locate on the STC campus, further leveraging access to STC’s substantial technical infrastructure, and other benefits including those available through the Start Up NY program.

Ontario County Fiber Optic Ring

Telecommunications is integral to Ontario County’s strategic pursuit of economic development. It is comparable to the economic impact of other paradigm-shifting infrastructure projects like the New York State Thruway and the Erie Canal. The Finger Lakes Regional Telecommunications Corporation, dba Axxcess Ontario, a not-for-profit local development

corporation, has led the development of fiber optic infrastructure since 2006. Over 200 miles of open access fiber cable is now available in Ontario County. The benefit to enterprise entities of education, healthcare, public safety, and government are clear. The potential of existing and available fiber via an open access model is becoming as clear to carrier entities.

The establishment of the fiber optic ring has already helped to retain and attract businesses to Ontario County. In addition, a goal of Axxess Ontario is to attract new workers to the region who are seeking a viable broadband capability to telecommute to jobs anywhere in the world. A core, tech-savvy workforce will also position the County and region appropriately to attract technologically based companies. Ontario County considers every company a customer.

The fiber optic ring has significantly enhanced the economic development potential of both Ontario County and the G-FL Region to compete in a knowledge-based economy. Axxess Ontario's affiliation with the Southern Tier Network, Yates County Fiber project and several private telecommunication companies indicate further expansion and capability of the network. It is used to stabilize and strengthen Ontario County's power grid, provide cost effective broadband capability to enterprise entities enhancing services and provides middle mile connectivity for private carriers to provide similar capabilities to all. Maintaining and expanding this fiber infrastructure is clearly in the interest of Ontario County and G-FL Region.

Fishers Ridge

Fishers Ridge is comprised of 125 acres ideally located between I-90 (NYS Thruway) and State Route 96 in Victor. It has one mile of frontage on the Thruway and over three million people within one hour of it. It is a mixed-use, planned unit development containing workforce housing, specialty retail, restaurants, hotel, and professional offices. Currently, it is bare land which needs all infrastructure built.

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

Table 28- 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 | Fiber Optic Ring | Ontario County OED/IDA | \$850,000 State, Local, Federal | 50 |
| ON-2 | 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-3 | Smart System Technology and Commercialization Center (STC) | Ontario County OED/IDA | \$6,400,000 New York State, Local, Private, EDA (Pending) | 200-240 |
| ON-4 | Fishers Ridge | Ontario County OED/IDA | \$251,830,000 Federal, New York State, Local, Private | 462 |

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 sizable manufacturing and financial components.

Economic development activities are going on throughout Orleans County including several adaptive reuse projects that retrofitted older buildings and returning them to the tax rolls. Tourism is also a key aspect of the local economy and the harbor area with Carlton has been targeted for potential development and investment. Efforts are also ongoing within Orleans County to provide “last mile” internet access to businesses that are at the end of the line, particularly much of the agricultural sector.

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, the City of Rochester and the City of 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. Many of the Orleans County villages are also discussing opportunities to upgrade or expand infrastructure including water and sewer lines to help position for future economic development opportunities and needs.

Orleans County has identified seven target development areas that can utilize existing infrastructure and available office/industrial space. The Orleans County Economic Development Agency has recently completed a draft industrial development plan to help identify and prioritize the infrastructure needs within the County. 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, and few existing buildings are in place to handle additional growth. The seven areas targeted for development are outlined below.

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 and the 150 acre, Shovel Ready certified “Shelby Tech Park”. The County has put in place permitting and zoning to allow for fast-track building on both sites. 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 2 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.

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, CRFS. This area encompasses the Albion Industrial Complex, which contains several building complexes including the 155,000 square foot CRFS 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 ten acres of undeveloped land owned by the County of Orleans IDA and currently has an urgent care facility located within its boundaries. 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. Do to wetland restrictions on the site there is limited opportunity for development within the site.

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. 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's priority projects are listed in Table 29.

Table 29 - 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 | Rail Infrastructure Expansion/Development Area 6 | County of Orleans IDA | \$2,500,000 State, Local, Federal, Private | Indirect |
| OR-2 | Medina Park Spec Building | County of Orleans IDA | \$3,000,000 EDA, Local, Private | 50 |
| OR-3 | Orleans Fiber Optic Pipe | County of Orleans IDA | \$500,000 EDA, Local, Private | Indirect |
| OR-4 | Rail Infrastructure Expansion/Development Area 2 | County of Orleans IDA | \$2,500,000 State, Local, Federal, Private | Indirect |
| OR-5 | Medina Business Park Clear land install basic infrastructure. | County of Orleans IDA | \$500,000 NYS,EDA, Local, Private | Indirect |

5.8 Seneca County

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. Targeted industry sectors include agriculture; food processing; advanced manufacturing/light manufacturing; agri-tourism; energy; and destination retail.

Seneca County has initiated an update to the County's Comprehensive Plan and begun development of each component, which includes agriculture; housing; environment; and infrastructure. The updated plan will help ensure that the County is taking the most appropriate actions and strategies to capitalize on its economic development strengths and create new growth opportunities.

A focal point of the Seneca County Industrial Development Agency's efforts over the past two decades has been the reuse and redevelopment of the former Seneca Army Depot. Investments in recent years have helped to create jobs and expand activities within the Seneca Army Depot. These investments include the Five Points Correctional Facility at the south end of the Depot.

The warehousing facilities located on the site are owned by Seneca Depot LLC, and are being subleased for storage and refurbishing of restaurant equipment by The Advantage Group. Other private investment projects include Finger Lakes Technology Group and Western Ag Enterprises. Additional activities currently ongoing at the Depot include a Hillside residential-

educational facility for youth in crisis, which has created 385 jobs; New York State Police and Seneca County Fire training facilities; and a Seneca County Law Enforcement Center.

Infrastructure problems and deferred maintenance by the U.S. Department of the Army has been a significant problem limiting the IDA and Seneca Depot LLC's ability to establish economic reuse of the property. Nonetheless, progress has been made. Fiber optic technology is available to any part of the Depot, some upgrades of electric distribution and substation are underway, and the main rail line from Geneva to the Depot has been significantly improved. Upgrades to the roads; sewer system; water system; and buildings has been studied to allow for their successful transition in support of private development activity, but little work has been completed. Rail access remains a high priority infrastructure need at the Depot at the current time, with the hope of establishing an inter-modal transportation hub at the Depot helping to ship agricultural goods as well as other transportation needs.

Environmental remediation is continuing and remains to be completed on a portion of an approximate 700 acre area (of 10,500) of the Depot. The Army is responsible for maintenance of the security fences and management of wildlife at the base, until environmental remediation has been completed, now estimated to be the year 2016.

The IDA and the Seneca County Economic Development Corporation (EDC) continue to revisit 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. 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.

Beyond the former Seneca Army Depot, development opportunities exist in the Towns of Waterloo and Seneca Falls, particularly along Routes 5 and 20, which includes the Deer Run Corporate Park in the Town 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 also 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.

Agriculture and associated agribusiness continues to expand, primarily in the southern portion of Seneca County and agribusiness continues to be a focus of the IDA. Local agricultural activities continue to grow with additional growers and producers establishing within the County and plans

in place to establish a new produce auction within the County. Wineries continue to look into market expansion opportunities with efforts to export to the New York City market underway. Farmers are also looking into ways to add additional value to their products and to expand the brand of the Finger Lakes through marketing efforts. In addition, in conjunction with NYS Empire State Development and Genesee/Finger Lakes Regional Planning Council, Seneca County has been awarded a grant to be used for a portion of the cost of a loan fund for agriculture-related enterprises.

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. Seneca County is also actively working with Finger Lakes Community College and Cayuga County Community College on workforce development initiatives including assisting businesses with employee training.

Federal, state and county investment continues in the infrastructure at the Finger Lakes Regional Airport, which is owned and operated by Seneca County. The investment will help increase the use of the airport which currently accommodates corporate aircraft by business travelers and tourists. The airport runway has recently been expanded to 4,700 feet and a number of other improvements are underway including repaving of the runway.

As a result of New York State enacting legislation creating up to twenty land banks across the State, specifically to address blight and revitalize local communities, Seneca County has been designated as a Land Bank. This designation will allow Seneca County to acquire, redevelop and improve tax delinquent, vacant or abandoned properties, thereby providing municipalities a mechanism to acquire such properties and return them to productive use.

The tourism industry within Seneca County is noted for the increasing number of wineries (now in excess of 30), restaurants and bed and breakfasts located along the shores of Seneca and Cayuga Lakes. The 115-store Waterloo Factory Outlet Center also continues to be a large contributor to economic activity and jobs in the retail sector of the County economy and serves as a major destination tourism attraction drawing in people from outside the County and the Region into Seneca County. 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.

Related to the County's tourism is the completed construction of the Sampson Veteran's Memorial Cemetery. It is anticipated that the cemetery operation will result in approximately 15,000 annual visitors to Seneca County spending approximately \$600,000 annually at local retail establishments, restaurants, tourist attractions and lodging facilities. The project removed over 40,000 square feet of dilapidated buildings; provides a place of honor and final rest for those veterans who have served the United States; and established a place of great civic pride for Seneca County and for the Region.

Seneca County priority projects are listed in Table 30.

Table 30 - 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 | Route 318 Sewer Expansion/Upgrades to Connections | Seneca County | \$12-15 Million NYS, Local | Up to 2,000 |
| 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-3 & S-6) |
| S-3 | Electrical Upgrade – Seneca Army Depot | Seneca County IDA | \$8.0 Million EDA | Up to 5,000 (including S-2 & S-6) |
| S-4 | Veterans Memorial Cemetery | Seneca County | \$3,170,000 County, State, Federal | 9 |
| S-5 | Small Business Assistance | Seneca County Workforce Development | \$1,000,000 EDA, Seneca County | Indirect |
| S-6 | 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-2 & S-3) |

5.9 Wayne County

The targeted industry clusters for Wayne County include optics and technology-based manufacturing, sustainable energy, agriculture related manufacture and equipment manufacturing. Tourism also is an important aspect of the Wayne County economy. Agriculture and the related agribusiness and food processing sector form another key component of economic activity within the County. Activities are prioritized annually by the County for general infrastructure and the Industrial Development Agency continues to follow the unilaterally adopted Economic Development Strategic Plan.

The Wayne County Economic Development and Planning Department is involved in projects aimed at strengthening and diversifying the local economy through agricultural enhancement and redevelopment of existing commercial and industrial properties with unresolved environmental constraints. The department also provides services to the WC IDA and goals are integrated, providing additional access to staff skills. While the department maintains a strong focus through its Agriculture Development Specialist, the WC IDA provides funding and incentives to grow the agricultural and food processing industries.

An environmental cleanup program is re-starting with the goal of bringing properties back to the tax-rolls and expanding the amount of developable land in the county while alleviating pressure to develop open space and agricultural properties. A point committee has been selected and they are working on a stepped plan to address issues with the current process. Staff have been

working with the county committee and administrator to determine what outside assistance is available and most effective.

Training for a stable, skilled workforce is a high priority for Wayne County and a critical component for attracting and retaining businesses within the region. A variety of workforce development issues exist within Wayne County ranging from unfilled engineering and high-tech manufacturing positions to the limited number of qualified workers for “middle” jobs and the high turnover rate amongst minimum wage positions. To help address these concerns a variety of programs/organizations are in place. The Wayne/Finger Lakes BOCES and Finger Lakes Community College (FLCC) continue to offer specialized training programs and 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, utilizing the Build-Now New York site. A new biology laboratory was completed at the FLCC Campus Center, with assistance from the Wayne County Industrial Development Agency. Additionally, the Finger Lakes Advanced Manufacturers Enterprise (FAME) continues to play a large role in workforce development efforts within the Finger Lakes counties including Wayne.

Recognizing that predictable and affordable utility costs are key components of a successful economic development strategy, the Wayne County IDA has worked with local sustainability expert, Bob Bechtold, to design the Wayne Industrial Sustainability Park (WISP). Modeled after the comprehensive sustainable energy generation system implemented by Harbec Plastics, the WISP offers cogeneration and distribution of thermal and wind generated power to industries as a way to attract and retain jobs.

Wayne County continues to work with experts in the fields of energy and energy distribution, positioning itself to develop an industrial park supported by sustainable, renewable, and affordable energy. An 850 kilowatt wind turbine has been installed by Northern Development in the Town of Ontario and work continues to secure additional funding for sustainability efforts at the WISP. 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.

The Town of Williamson, under the leadership of Supervisor Jim Hoffman and the Williamson Energy Committee, completed a solar array built on its closed town landfill. The sun will now provide all the electricity needed at Williamson municipal facilities, including the town hall and library. As an off-shoot of that project, the Solarize Williamson focus has emerged, offering information and assistance in accessing technical services and available incentives for residents to install solar for home use.

Two Wayne County towns submitted proposals to fund feasibility studies for micro grids under the recent NYS program. Although the proposals did not result in funding, probably due to the size and rural nature of the communities, the project at Harbec Plastics proves that an industrial micro grid is reasonable. Movement along these lines continues.

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. Phase II of the Timothy Lane Project in the Town of Ontario has been completed. Phase III of the project will continue the expansion of both the Wayne Industrial Sustainability Park and the Commerce Park. In the future it will include a rail crossing with gates and lights, improvement to an upgraded intersection at the Lincoln Road Intersection, along with the road.

The Wayne County ED/P Department is involved in a multitude of issues concerned with raising the quality of life in the County for current residents and potential employees of firms locating within Wayne County. Water resources planning initiatives are underway within the County to help preserve the quality of water bodies and drinking and septic systems. Using CDBG funding, the County, with management by ED/P, has been able to offer water and sewer hook-ups, septic tank improvements and well analysis and improvement to residents across the county meeting the grant's eligibility criteria.

Important economic development and environmental opportunities also include water system expansions and upgrades to the systems in the northeast quadrant of the County, specifically to restore and develop adequate fire pressures and acceptable, reliable potable water to the Village of Wolcott, and parts of the Towns of Wolcott and Butler. This water upgrade is crucial to both residents and businesses and a key aspect of business retention and expansion within the northeastern quadrant of Wayne County.

A site plan has been completed for a proposed "freight village" at the Lyons Industrial Park. The project would take advantage of freight and goods movement opportunities provided by the intersection of the CSX main line and the Corning Secondary, the Erie Canal, and access to the New York State Thruway.²⁵ The intersection of the two lines is a significant hurdle, versus the opportunity it first appeared to be. The area still sits high on the priority list for development. Rail has become more important to businesses looking to expand in Wayne County. Consequently, the IDA is conducting a study to determine the best sites in the county to establish trans-load and intermodal facilities, along with expanding other services.

The Williamson-Sodus Airport in the Town of Sodus, a privately owned center that provides easy access to private aircraft in the industry sector, hopes to expand the airport to serve additional flights as well as larger private planes. Financing and additional land acquisition will be needed to move this project forward.

Recently completed economic development projects included the expansion of the Ultimate Refractory facility helping to retain and create jobs in Newark. Facility purchases in the Monroe-Wayne Park; retail development in Macedon; expansion of DNT Express in Clyde; Walworth Plaza; Advanced Atomization Technologies (GE and Parker) in Clyde. WC IDA also continues its partnership with SCORE, as the Wayne County Business Builders, helping to support entrepreneurship and small business development within the County.

²⁵GTC/NYS DOT. "Transportation Strategies for Freight/Goods Movement in the Genesee-Finger Lakes Region. Tasks 5 and 6: Identification, Evaluation, and Prioritization of Alternatives."
http://www.gtcmpo.org/Freight/GTC%20Frt%20Project%20Eval%20Summary_DRAFT16.pdf

The department and the WC IDA recognize the gaps in telecommunication network within the county. Bringing fiber optics to those areas/pockets of the county that are not served will help local businesses compete globally and allow for improved efficiency with regards to communication and data transfer. Working with the current NYS program and private developers, the goal is to achieve more coverage across the county in the next three years.

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

The concerns of Wayne County Lakes Ontario shoreline residents and County legislators continue to be voiced during discussions and technical hearings regarding the International Joint Commission Plan 2014. If the plan is adopted, mitigation, avoidance and resiliency tactics will have to be developed. Not only has the amount of shoreline in Wayne County been underestimated in the plan, as the bays were left out of the calculations, but the cost of mitigation and repair have been grossly underestimated.

FEMA has put a new system in place and within it are actions that can contain the cost of flood insurance. Infrastructure, specifically sewer and water, that will be underwater in the future, need to be protected for health and safety of residents. Changes to zoning and building codes may assist in avoiding severe damage. Shoreline stabilization may be necessary. Funding is needed to address these protections so they can protect; not to pay for damage after it has occurred.

Wayne County priority projects are listed in Table 31.

Table 31 - Wayne County Priorities

| | Proposed Project | Lead Agency on project | Total Project Cost and Funding Sources | # of jobs projected to be created |
|-------|--|---|--|---------------------------------------|
| WA-1 | Infrastructure Improvements Water, sewer, roads, energy including industrial park sites | Wayne County | TBD Federal, State, Local, Private | 25-700 (depending on geography) |
| WA-1b | Industrial Road-Town of Ontario in its entirety, Beh to Lincoln (see WA-1) PHASES 1,2 COMPLETED | Wayne County IDA; Town of Ontario | \$5 Million Local, State, Federal | 25-300 (depending on phase) |
| WA-1c | Wayne Industrial Sustainability Park and pod infrastructure improvements—Ontario ONGOING | Wayne County IDA | \$7.1 Million Federal, State, Local, IDA, Private | 15-300 |
| WA-2 | Determination of Status and Implementation of process for Buildings with Potential Environmental issues | Wayne County | TBD Federal, Local, State | TBD |
| WA-2b | Improve Downtowns ONGOING; SOAR IN SE QUAD; LYONS; PALMYRA | TBD | \$240,000 start up program | 5-100 |
| WA-3 | Fiber Optic Infrastructure (last mile) | Wayne County PPP | \$2 Million Federal, State, local, private | 30-150 (depending on phase) |
| WA-4 | Multi modal transportation and logistics site, Lyons or other appropriate site. Development of industrial park site/s | Wayne County IDA; Town ; private | \$7-\$18 million Local munis Economic Dev. Corp.; Federal, State, Private | 15-300 (depending on phase) |
| WA-4b | Rail upgrades, OMID line and Norfolk Southern | TBD | TBD Fed, Local, State, Private | TBD |
| WA-5 | Determine realistic impacts of PLAN 2014 and develop plan for resiliency through avoidance, maintenance, code. | TBD | TBD Fed; local; state;private | indirect |

5.10 Wyoming County

The Wyoming County Board of Supervisors recognizes the importance of a strong County economy by actively supporting economic development efforts within the County including: continuing to contract with the Wyoming County Business Center to provide business attraction and retention activities; supporting the Wyoming County Industrial Development Agency and the Wyoming County Business Center in the areas of real estate and infrastructure development, and by continuing to seek economic development grant assistance for economic development through New York State and other organizations.

Dairy is the largest industry in Wyoming County and supporting this economic sector is a top priority. In 2012 there were 713 farms, consisting of 225,864 acres, whose crops and livestock cash receipts totaled \$318,505,000, the highest cash receipts total in New York State. Despite the strengths of the agricultural sector, Wyoming County recognizes that there are a multitude of challenges impacting the growth of agriculture within the County. These challenges include infrastructure limitations; workforce skills gaps; and increasing inefficiencies among producers. To combat these challenges Wyoming County is actively working to increase infrastructure capabilities to handle large volumes of waste water, support transportation needs; provide broadband access; and encourage collaboration between producers, processors, research facilities and the public and private sector.

One of the challenges for Wyoming County and other rural counties is the limited “critical mass” needed for infrastructure upgrades and improvements. With regard to electric service, the utility companies are unlikely to expand their service area unless they can guarantee a large number of new companies/customers to offset their expansion costs through service fees. The same issue is also present with regards to broadband access as well.

The Wyoming County Business Center and the Wyoming County Industrial Development Agency 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. 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 of existing firms that are already located within community. Supporting local entrepreneurs and private investment that will help grow the next generation of employers is also essential.

Targeted industries for expansion include agriculture and agri-business; manufacturing; renewable energy; as well as the service sector including call centers, banks and insurance. 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, solar power, and micro-grid development have become a County priority in support of New York State initiatives and programs. 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.

Wyoming County is also working closely with the workforce development organizations in the area to assist in vocational training to reduce the skills gaps. In fact Alfred State College currently has a 100% placement rate for graduates of their vocational program. Another workforce development initiative underway is the FastTrac New Venture entrepreneurship development program. This Kauffman Foundation entrepreneurship program has proven to be very effective in Wyoming County for the development of sound business plans and getting new businesses started off on the right foot. Participants in the two offerings of the training program went through ten fast paced and challenging classes over a ten week period that resulted in the development of their business plans, positioning graduates to establish new businesses within the County.

A major project, the Wyoming County Rural Arts Initiative, has also started to establish a hub for “rural” art in the Villages of Warsaw and Perry. The project will utilize existing storefronts for art studios and galleries to help attract tourism to Wyoming County, with the long-term goal of expanding the project County wide.

Brownfield remediation work has concluded at the former A&A Metal Fabricating, site in the Village of Perry. A draft pre-nomination study has been completed under the New York State Department of State Brownfield Opportunity Area program for an approximately 100 acre area, which includes the A&A site. New York State DEC has declared the site to be an insignificant environmental hazard and is no longer listed as active. A business prospect has expressed an interest in acquiring the property and initially will be leasing a building by August 1, 2014. The Robeson building in Castile, a former NYS DEC Superfund Cleanup site, is now owned by a private sector individual and three businesses are operating out of the facility.

Wyoming County priority projects are listed in Table 32.

Table 32 - 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 Agriculture and Business Center, Warsaw | Center Street Business Center, LLC | \$4.2 Million Private, Local CFA | 15 |
| WY-2 | New Hotels-Warsaw, Arcade & Perry | Wyoming County IDA | \$7 Million Private, ESD | 14 |
| WY-3 | Wyoming County Rural Arts Initiative | Wyoming County | \$2.5 Million Private, NYS | 25 |
| WY-4 | Town of Castile water improvement- Silver Lake Institute | Wyoming County Water Resource Agency | \$1 Million Private, Public, EFC, WCIDA | 15 |
| WY-5 | Village of Arcade Wastewater Treatment Expansion | Village of Arcade | \$4.6 Million Public | TBD |
| WY-6 | Wyoming County Multimodal Rail Initiative-Town of Gainesville | Wyoming County IDA | \$2 Million Private, NYS | 5 |
| WY-7 | Alternative and Renewable Energy Initiatives- bio-energy, anaerobic digesters, small wind, solar | Wyoming County IDA | \$4.5 Million NYSERDA, USDA, Private | 5 |
| WY-8 | Redevelopment of A&A Facility in Perry | Wyoming County Business Center | \$2 million Local, USDA, EDA | 10-25 |
| WY-9 | Perry Commerce Center | Wyoming County IDA | \$2.2 Million EDA, USDA, Local | 100 |
| WY-10 | Spec Building, Steele Ave. Arcade | Wyoming County IDA | \$1.8 Million Local, USDA | 20 |
| WY-11 | Agri-business Incubator | Wyoming County IDA | \$1.5 Million Local, USDA, EDA | 15 |
| WY-12 | Agri-tourism | Wyoming County | \$5 Million Private, Local | TBD |
| WY-13 | Silver Lake Outlet Drudging Project | Town of Castile, Town of Perry, Village of Perry, Silver Lake Commission | \$2 Million Public | TBD |
| WY-14 | County-wide Rural Broadband Initiative | Wyoming County | \$5 Million Private, Public | 100 |
| WY-15 | Genesee River Wilds-Whisky Bridge | Wyoming County | \$25,000 Private, Public | TBD |

5.11 Yates County

Yates County has developed a diverse economic base, with manufacturing, agriculture and tourism the three main industries. Recent years has seen growth and expansion in high-technology businesses, the traditional local businesses, as well as tourism, and agriculture and agri-business. 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 Region offers a high quality of life with a multitude of natural attractions and amenities. Additional amenities important for economic development are also present, such as below market electric rates from the Penn Yan municipal utility; an expanding general aviation airport; water and sewer infrastructure within many areas of the County; and an abundance of fresh water.

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, helping to bring visitors and investment to the area. The opening of the Best Western Vineyard Inn & Suites in downtown Penn Yan added much needed lodging. The success of the project has led to a Microtel Hotel opening up in Penn Yan as well and an additional hotel under construction that is scheduled to open in 2016.

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. 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. Finger Lakes Community College has expanded their viticulture program and is actively working with Yates County wineries to get students experience in the field.

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. As a result KanPak, a dairy processing company in Penn Yan, is currently completing an expansion of their facility. Additionally, many visitors are attracted to the crafts and agricultural goods produced in the County, especially by the growing Mennonite population. In 2012, agricultural cash receipts for both crops and livestock totaled over \$117 million for the County.

The Yates County Industrial Development Agency, doing business as the Finger Lakes Economic Development Center (FLEDC), 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. With these goals in mind the FLEDC has created a funding source of over \$1 million for agricultural and entrepreneur businesses in Yates County. This fund also helped to shape the development and establishment of the Growing the Agriculture Industry Now! (GAIN) Fund in the nine-county Finger Lakes Region.

Distance learning and online education has also been identified as a goal for the FLEDC and efforts are underway to establish a virtual classroom within the County that would have direct connections with each of the other eight Finger Lakes Region counties and the regional colleges and universities. Infrastructure limitations are also present within the County including a lack of water infrastructure along Route-14 and wastewater infrastructure upgrades needed in the Village of Penn Yan for the waterfront development project.

Community revitalization efforts are ongoing throughout the County with several projects underway within the Village of Penn Yan that include retail on street level with residential apartments on the upper floors. Façade improvements and business attraction efforts have also been successful in filling in vacant storefronts and improving the aesthetics along both the Village of Dundee and Village of Penn Yan.

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

| Table 33 - 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 Infrastructure Improvements | Finger Lakes EDC, Yates County, Penn Yan, Milo | \$2,500,000 EPA, DEC, County, Local | Up to 25 |
| Y-2 | Yates County Open Access Fiber Network | Yates County | \$3,000,000 NYS, Yates County | Indirect |
| 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 – 2014 Goals, Objectives, Strategies and Measures

6.1 Stakeholder Input Sessions

Three stakeholder input sessions were held within the Genesee-Finger Lakes Region in July, 2014. The purpose of the stakeholder input sessions was to define a regional vision and set corresponding goals, objectives, and measures. The first meeting was held in Canandaigua, NY, on the eastern side of the Region, with the second meeting being held in Rochester, NY, the geographic center of the Region, both of which on July 22nd, 2014. The third and final meeting was held on the western side of the Region in Batavia, NY on July 24th, 2014. 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. 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, and Strategies

The following goals, objectives, and strategies were developed in 2014 based on both the stakeholder input sessions and discussions held with the nine county Economic Development Departments/Industrial Development Agencies, Planning Departments and other economic development stakeholders. A copy of the notes from the 2014 stakeholder input sessions can be found in Appendix 9.

Goal 1: Assist in the Retention and Expansion of Existing Industries in the District

Objective 1A:

- Continue to work with federal, state, and local public and private sector partners to secure and leverage funding

Strategies:

- Continue to foster relationships with commercial banks
- Continue to administer the Genesee/Finger Lakes Regional Planning Council Regional Revolving Loan Fund and work with other regional partners to link available regional revolving loan funds with businesses in need of financing
- Work with local organizations and entities on packaging public and private financing options
- Continue efforts to assist rural counties and organizations with identification of funding opportunities
- Establish and administer the Growing the Agriculture Industry Now! Revolving Loan Fund and work with regional partners to connect the loan fund with agriculture businesses in need of financing

Objective 1B:

- Continue to work with partners on maintaining, developing and marketing economic development programs and initiatives

Strategies:

- Continue to foster relationships with public and private sector partners to build public private partnerships and to collaborate on projects
- Continue to seek out new partners for G/FLRPC programs and initiatives
- Work with and support state, regional, county, and local programs and projects

Goal 2: Assist in the Attraction of Industries and Firms to the District

Objective 2A:

- To support organizations and/or municipalities in the attraction of firms and industries

Strategies:

- Continue to support regional organizations and the county Industrial Development Agencies in their business attraction efforts
- 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 and strategies
- Support regional efforts to attract foreign investment to the Region through utilization of foreign trade zones and other economic development tools
- Assist regional partners in marketing of economic development assets including geographic location; ease of access to markets via transportation infrastructure; supply-chain connections; and availability of low-cost hydro power
- Assist regional partners in their efforts to leverage Eastman Business Park for business attraction, job creation, and economic development investment

Objective 2B:

- To encourage efforts to improve the economic development and business climate within New York State and the Finger Lakes Region

Strategies:

- Support the efforts of Colleges and Universities to establish properties within the START-UP NY program to help attract new businesses to the District
- Work with local, regional, state and federal leadership to help shape future economic development policy, including the overarching issues of immigrant reform; energy policy; aging in place; climate change; and property tax cap
- Support the development and implementation of the Finger Lakes Regional Economic Development Council Strategic Plan
- Continue to work with the State to identify and revise regulations impacting economic development
- Assist regional partners in improving the efficiency of business attraction and retention efforts through collaboration and the streamlining of permits/applications

Goal 3: Advance the Development of Targeted Regional Clusters, including Advanced Manufacturing and Alternative Energy within the District

Objective 3A:

- Bolster the competitiveness of the Region's clusters

Strategies:

- Continue to support economic development partners with projects that advance regional clusters, including Information and Communications Technology; Optics and Imaging; Biotech and Life Sciences; Agribusiness and Food Processing; Advanced Manufacturing; and Alternative Energy
- Utilize the IMCP designation to obtain funding to strengthen Regional Clusters, including Advanced Manufacturing; Optics & Photonics; and Precision Manufacturing
- Focus collaboration and support of development and marketing efforts around Regional Clusters within the District
- Pursue funding opportunities to expand alternative energy and green energy projects within the District

Objective 3B:

- Support existing Regional efforts to advance and promote Regional Clusters

Strategies:

- Continue partnership with the Cornell Agriculture & Food Technology Park and other organizations to help further the food and beverage cluster
- Continue support of the Finger Lakes Food Processing Cluster Initiative and the Rochester Regional Optics, Photonics, and Imaging Accelerator
- Continue support of workforce development organizations and cluster based training programs

Goal 4: Support Agriculture and Agri-business

Objective 4A:

- To continue to work with economic development partners to establish, maintain, and market programs and initiatives targeted to the advancement of agriculture and agri-business

Strategies:

- Pursue opportunities to educate leadership on the economic impacts of agriculture within the Region
- Continue partnerships with regional food and beverage cluster organizations, including the Cornell Agriculture and Food Technology Park
- Continue support of the RIT-CIMS Finger Lakes Food Processing Cluster Initiative project through membership on the Leadership Council
- Assist regional efforts in the development of a sustainable foodshed and farm to table and post consumption initiatives
- Pursue opportunities to assess and enhance food and food systems within the District
- Support regional efforts to connect youth to careers in Agriculture and to provide workforce development training for the Agriculture sector
- Support regional efforts and policies to expand New York State Wine, Beer, and Spirits

- Assist regional economic development partners in their efforts to retain and expand the Yogurt/Dairy industry within the District
- Establish and administer the Growing the Agriculture Industry Now! Revolving Loan Fund and work with regional partners to connect the loan fund with agriculture businesses in need of financing

Objective 4B:

- To encourage the protection of preservation of agricultural land within the District

Strategies:

- Support the development of Farmland Protection Plans within the District
- Pursue opportunities to educate leadership on the economic impacts of agriculture within the Region
- Support regional efforts to promote comparative agricultural advantages of the Region, including a favorable climate with limited natural disasters and level topography

Goal 5: Strengthen Entrepreneurship, Innovation, and Small Business Development

Objective 5A:

- To encourage and support entrepreneurship and the entrepreneurial spirit

Strategies:

- Support institutions, programs and initiatives that perform or support technology transfer and commercialization
- Support regional efforts to leverage the Innovation Hotspot designation to advance innovation and commercialization
- Support the activities of regional organizations that promote entrepreneurship and small business including, but not limited to: The Entrepreneurs Network; High Tech Rochester; Smart Systems Technology and Commercialization Center; the Cornell Agriculture and Food Technology Park
- Support the development and implementation of Small Business Innovation Research grants within the District
- Expand collaboration efforts with the Cities of Syracuse and Albany to establish and advance a “technology corridor” along the New York State Thruway

Objective 5B:

- To provide improved financing options; technical knowledge; and support to small and medium-sized business owners

Strategies:

- Continue to administer the Genesee/Finger Lakes Regional Planning Council Regional 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
- Continue providing support to organizations such as Excell Partners, Inc. in their efforts to assist entrepreneurs in obtaining venture capital
- Continue to assist regional partners in their pursuit for entrepreneurship and small business development funding opportunities

Objective 5C:

- To pursue opportunities to establish and advance innovation, entrepreneurship, and small business within Rural areas of the District

Strategies:

- Assist in building support amongst regional partners for collaboration on rural entrepreneurship projects
- Assist regional partners in identifying and obtaining funding for rural entrepreneurship and commercialization projects

Goal 6: Assist in Improving the Skills of the District's Workforce

Objective 6A:

- To continue to support regional workforce training and workforce development efforts

Strategies:

- Further connections between Workforce Investment Boards, other regional workforce development organizations, and EDA programs
- Assist in linking Workforce Investment Boards with workforce development best practices efforts from around the State and County.
- Pursue opportunities to educate leadership of the need for immigration reform to benefit the agriculture and advanced manufacturing sectors
- Work with educational partners and workforce development agencies to address low graduate rates and declining school district enrollments

Objective 6B:

- To support the workforce investment boards and other workforce development organizations with high-skill technical and advanced manufacturing career training programs

Strategies:

- Partner with and provide professional support to the Regional Workforce Investment Boards and other regional organizations, including Finger Lakes Advanced Manufacturing Enterprise, Rochester Technology and Manufacturing Association; and Rochester Regional Photonics Cluster to connect training efforts with existing job opportunities
- Support regional partners in the promotion and implementation of the *Finger Lakes Works...with their hands* program

Goal 7: Assist in Improving the Infrastructure of the District

Objective 7A:

- To support the establishment of shovel-ready sites within the Region

Strategies:

- 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
- Market Build-Now NY certified shovel-ready sites

Goal 8: Enhance Tourism and Marketing within the District

Objective 8A:

- To further develop the Finger Lakes Region as a destination location for visitors and new residents

Strategies:

- Continue to support the Finger Lakes wine industry and culinary artisanship
- Support efforts to develop the Region as an agritourism destination
- Market the advantages of the Region including low cost of real-estate, cultural attractions, location, and high quality of life including its strong regional health system
- Support regional efforts to attract and retain residents through an emphasis on quality of life improvements

Objective 8B:

- To further develop and promote the recreational attributes of the Region

Strategies:

- 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
- Assist regional tourism agencies in connecting Finger Lakes college students with Regional tourism attractions
- Pursue funding opportunities for the dredging of harbors and water bodies in the District

Objective 8C:

- To utilize the Erie Canal as a tourism and economic development opportunity

Strategies:

- Continue to support the work of the New York State Canal Corporation, Erie Canalway Heritage Corridor, and other tourism and development groups
- Support exploration of the benefits of a 12th I Love New York Tourism Region along the Erie Canal community across New York State

Objective 8D:

- To improve and expand economic development marketing of success stories

Strategies:

- Support regional partners in marketing the economic development successes of the District
- Pursue opportunities to educate leadership and the public of the importance of economic development investment and job creation/retention

Goal 9: Encourage Sustainable Development Practices

Objective 9A:

- To identify, remediate, and redevelop brownfield sites within the District

Strategies:

- Administer or assist in Brownfield Opportunity Area programs within the Region
- Pursue opportunities through the Environmental Protection Agency and other sources for brownfield assessment, clean-up, and redevelopment funding

Objective 9B:

- To encourage efficient land use and development patterns

Strategies:

- Continue to provide education, training and assistance to communities related to comprehensive plans and land-use regulation control
- Continue to work with communities as needed on the development of comprehensive plans and land use regulation and control
- Continue to produce the annual Land Use Monitoring Report
- Work with regional partners on the implementation of the Finger Lakes Regional Sustainability Plan
- Support regional partners in ongoing efforts to limit waste generation within the District and the amount and type of waste that the District accepts from outside regions
- Embrace complete street initiative requirements and livable communities initiatives for new development
- Pursue opportunities for shared-services between communities
- Continue to work with the Finger Lakes Economic Development Council through the Sustainability Working Group to identify and fund sustainability projects within the District

Objective 9C:

- To protect water quality

Strategies:

- Complete and implement regional water resources projects and programs
- Continue to work closely with Water Quality Coordinating Committees and Watershed Groups through the Region
- Work closely with regional partners to address invasive species within the District
- Continue to work with and assist in the implementation of climate change adaptation, Floodplain Management, the National Flood Insurance Program and the Community Rating System

Objective 9D:

- To develop and implement hazard mitigation plans that comply with state and national standards

Strategies:

- Continue to provide All-Hazard Planning assistance to Counties and Municipalities for the development or revision of All-Hazard Mitigation Plans

Objective 9E:

- To pursue opportunities for alternative energy to improve sustainability and to help lower high energy costs

Strategies:

- Pursue funding opportunities to expand alternative energy projects in the district
- Support efforts to strengthen ethanol, methane, wind, and hydrogen within the Region
- Continue efforts to educate economic development stakeholders on waste to energy and alternative fuels through sessions at the Local Government Workshop

Goal 10: Encourage Main Street Revitalization and Historic Preservation

Objective 10A:

- Help stabilize Village Main Streets and promote community development

Strategies:

- Assist in linking developers with federal and state preservation and rehabilitation programs to encourage Main Street redevelopment
- Encourage villages to apply for New York Main Street grant funding

Objective 10B:

- Provide stable housing opportunities within the Region

Strategies:

- Assist in maintaining character of the community including diversity of housing types
- Encourage development of livable communities including senior-housing where appropriate
- Encourage communities to develop and enforce design guidelines and zoning regulations to improve quality of life

Objective 10C:

- Pursue opportunities for waterfront development within the Region

Strategies:

- Work with municipalities to identify priority areas for development and mitigating concerns
- Work with regional partners to educate stakeholders about the EPA navigable-water regulations and address concerns

Objective 10D:

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

Strategies:

- 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
- Assist regional partners in the encouragement of small retailers to embrace internet sales
- Work with regional partners to encourage “buy local” campaigns to help increase sales tax revenue

Objective 10E:

- Pursue opportunities to advance Community Development and reduce poverty within the District

Strategies:

- Support regional efforts to reduce poverty and income inequality within the District
- Work with regional partners to identify and advance Opportunity Agenda projects including: Hillside Work-Scholarship Connection; Boys and Girls Club of Rochester; and Stepping Stones Learning Center and Child Care
- Work with regional partners to pursue opportunities to improve access to health care and affordable child care

Goal 11: Strengthen Regional Coordination and Collaboration

Objective 11A:

- To collaborate on programs and initiatives

Strategies:

- Continue to foster relationships with public and private sector partners to build public private partnerships and collaborate on projects
- 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
- Continue to coordinate economic development programs with the colleges and universities within the Region
- Encourage regional partners to pursue opportunities to collaborate with other Finger Lakes Region counties and outside regions to develop and implement economic development projects
- Work closely with regional partners in the development and implementation of the Genesee/Finger Lakes Regional Engagement project

Objective 11B:

- To promote information sharing in the Region

Strategies:

- Continue to use the EDAC/RDC/GRE Economic Development Partners meetings as a medium for information sharing
- Continue to facilitate Regional Roundtable discussions on critical regional economic development and planning issues
- Continue to maintain Genesee/Finger Lakes Regional Planning Council website with project information and data
- Continue to hold Regional Local Government Workshops to educate local government officials, municipal council and board members, elected officials and other stakeholders
- Attend relevant training and professional development conferences and workshops offered by state and national organizations involved in economic development and planning to further increase support capabilities to agencies throughout the District
- Continue to administer webinars to inform and educate stakeholders on a variety of regional, local, and water resources planning; economic development; and data technology/resource center topics

Objective 11C:

- Coordinate Economic Development Activities with the Finger Lakes Regional Economic Development Council Strategic Plan

Strategies:

- Continue to participate in Regional Economic Development Council workgroups
- Continue to work closely with economic development stakeholders to identify economic development priorities
- Identify and coordinate economic development funding from a variety of sources to help implement projects

6.3 Performance Measures

As economic conditions are constantly changing within the Genesee-Finger Lakes Region it is critical to identify performance measures that can help assess the overall effectiveness of the Comprehensive Economic Development Strategy and the economic development conditions within the Region. As the economic environment is constantly in flux within the Region, Genesee/Finger Lakes Regional Planning Council annually revisits the CEDS to update and revise the document as needed, allowing the CEDS to continuously evolve as a living document reflecting the constantly changing economic development priorities of the Region.

To evaluate the successful implementation of the CEDS document the following performance measures are tracked within the Region:

1. The number of CEDS initiatives successfully implemented
2. The types of projects that were implemented
3. The number of brownfield projects implemented
4. The number of technology projects implemented
5. The number of jobs created or retained
6. The estimated amount of private sector investment within implemented projects
7. The estimated amount of public sector investment within implemented projects
8. Socio-economic and demographic data within the region including but not limited to:
 - a. Population
 - b. Educational attainment
 - c. Per capita income
 - d. Poverty
 - e. Employment
 - f. Industry sectors
 - g. Unemployment
 - h. Innovation
 - i. Building permit trends
9. Amount of grant funding secured
10. Number of participants at Local Government Workshops

Chapter 7 – 2014 Plan of Action

This section provides an overview of past, present, and potential G/FLRPC activities, projects, and program areas each of which helps to address the specific goals, objectives, and strategies of the Comprehensive Economic Development Strategy outlined within Chapter 6.

7.1 Economic Development

The G/FLRPC Economic Development program area includes regional economic development coordination, revolving loan fund administration, community advocacy, strategic planning, community revitalization, and technical assistance. Also included within the Economic Development program area is the development and implementation of the Comprehensive Economic Development Strategy (CEDS). To this end G/FLRPC is involved in a number of economic development projects and initiatives to further the goals, objectives, and strategies identified in Chapter 6.

- A) Assist in the Retention and Expansion of Existing Industries in the District
 - a. Continue to work with federal, state, and local public and private sector partners to secure and leverage funding
 - b. Continue to administer the Genesee/Finger Lakes Regional Planning Council Regional Revolving Loan Fund and work with other regional partners to link available regional revolving loan funds with businesses in need of financing.
 - c. Continue efforts to assist counties and organizations, especially rural counties, with identification of funding opportunities
 - d. Establish and administer the Growing the Agriculture Industry Now! Revolving Loan Fund and work with regional partners to connect the loan fund with agriculture businesses in need of financing
- B) Assist in the Attraction of Industries and Firms to the District
 - a. Assist counties and municipalities in the development and implementation of local economic development plans and strategies
 - b. Support the development and implementation of the Finger Lakes Regional Economic Development Council Strategic Plan
 - c. Work with regional partners on the implementation of the Finger Lakes Regional Sustainability Plan.
- C) Advance the Development of Targeted Regional Clusters, including Advanced Manufacturing and Alternative Energy within the District
 - a. Continue support of the RIT-CIMS Finger Lakes Food Processing Cluster Initiative project through membership on the Leadership Council
 - b. Continue support of the Rochester Regional Optics, Photonics, and Imaging Accelerator through membership on the advisory board
 - c. Support the utilization of the IMCP designation to leverage funding within the District

- D) Support Agriculture and Agri-business
 - a. Continue support of the RIT-CIMS Finger Lakes Food Processing Cluster Initiative project through membership on the Leadership Council
 - b. Pursue opportunities to assess and enhance food and food systems within the District
 - c. Establish and administer the Growing the Agriculture Industry Now! Revolving Loan Fund and work with regional partners to connect the loan fund with agriculture businesses in need of financing
- E) Strengthen Entrepreneurship, Innovation, and Small Business Development
 - a. Support the activities of regional organizations that promote entrepreneurship and small business including, but not limited to: The Entrepreneurs Network; High Tech Rochester; Smart Systems Technology and Commercialization Center; the Cornell Agriculture and Food Technology Park
 - b. Continue to administer the Genesee/Finger Lakes Regional Planning Council Regional Revolving Loan Fund to provide small businesses with gap financing
- F) Assist in Improving the Skills of the District's Workforce
 - a. Further connections between Workforce Investment Boards, other regional workforce development organizations, and EDA programs
- G) Assist in Improving the Infrastructure of the District
 - a. Continue to partner with the regional Metropolitan Planning Organization, Genesee Transportation Council, on planning and transportation issues that impact the Geneses-Finger Lakes Region
 - b. Continue to produce the annual Land Use Monitoring Report
 - c. Continue to work with the Finger Lakes Economic Development Council through the Infrastructure and Transportation Working Group to identify and fund transportation and infrastructure needs within the District
 - d. Pursue infrastructure improvements through the Regional Engagement project
 - e. Pursue opportunities to conduct an infrastructure inventory and analysis within the District

7.2 Regional, Local, and Water Resources Planning

The G/FLRPC Regional, Local, and Water Resources Planning program area includes land use, water resources, municipal, hazard/flood mitigation, Main Street revitalization, and historic preservation planning in addition to local government support and training/workshop/conference development and coordination. The Regional, Local, and Water Resources Planning program area supports the Economic Development program area with regards to implementation of the Comprehensive Economic Development Strategy with a variety of tasks listed below.

- A) Enhance Tourism and Marketing within the District
 - a. Continue to support the work of New York State Canal Corporation, Erie Canalway Heritage Corridor, and other tourism and development groups
 - b. Continue to act as a resource regarding regional blueways trails
 - c. Support efforts of regional partners in identifying and securing funding for tourism promotion
- B) Encourage Sustainable Development Practices
 - a. Administer or assist in Brownfield Opportunity Area programs within the Region
 - b. Pursue opportunities through the Environmental Protection Agency and other sources for brownfield assessment, clean-up, and redevelopment funding
 - c. Continue to provide education, training and assistance to communities related to comprehensive plans and land-use regulation control
 - d. Continue to work with communities as needed on the development of comprehensive plans and land use regulation and control
 - e. Continue to produce the annual Land Use Monitoring Report
 - f. Work with regional partners on the implementation of the Finger Lakes Regional Sustainability Plan
 - g. Continue to provide All-Hazard Planning assistance to Counties and Municipalities for the development or revision of All-Hazard Mitigation Plans
 - h. Complete and implement regional water resources projects and programs
 - i. Continue to work closely with Water Quality Coordinating Committees and Watershed Groups through the Region
 - j. Continue to provide assistance to municipalities and local governments regarding the development and implementation of local planning projects
 - k. Continue to work with the Finger Lakes Economic Development Council through the Sustainability Working Group to identify and fund sustainability projects within the District
- C) Encourage Main Street Revitalization and Historic Preservation
 - a. Assist in linking developers and other stakeholders with federal and state preservation and rehabilitation programs to encourage Main Street redevelopment
- D) Strengthen Regional Coordination and Collaboration
 - a. Continue to foster relationships with public and private sector partners to build public private partnerships and collaborate on projects
 - b. Continue to seek out new partners for G/FLRPC programs and initiatives

- c. Work with and support state, regional, county, or local economic development programs or initiatives
- d. Continue to use the EDAC/RDC meetings as a medium for information sharing
- e. Continue to facilitate Regional Roundtable discussions on critical regional economic development and planning issues
- f. Continue to hold Regional Local Government Workshops and webinars to educate local government officials, municipal council and board members, elected officials and other stakeholders
- g. Attend relevant training and professional development conferences and workshops offered by state and national organizations involved in economic development and planning to further increase support capabilities to agencies throughout the District
- h. Coordinate Economic Development Activities with the Finger Lakes Regional Economic Development Council Strategic Plan and continue to participate in the Infrastructure and Transportation; and Sustainability Workgroups
- i. Work closely with regional partners in the development and implementation of the Genesee/Finger Lakes Regional Engagement project
- j. Work with municipalities on the sharing of services

7.3 Data, Technology, and Resource Center

The G/FLRPC Data, Technology, and Resource Center program area includes the New York State Census Data Affiliate Program; Geographic Information Systems & Remote Sensing; Resource Library with GIS inventory; as well as a comprehensive Web Site. The Data, Technology, and Resource also provides support for both the Economic Development and Regional, Local, and Water Resources Program areas and assists with implementation of the CEDS in a variety of tasks listed below.

A) Strengthen Regional Coordination and Collaboration

- a. Continue to fill information and data services request from citizens, business, 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
- c. Partner with the New York State Data Center and university centers to deliver improved data to regional stakeholders
- d. Provide GIS/Remote Sensing assistance and support through activities such as mapping and database creation to support economic development functions
- e. Update information and links on G/FLRPC's website to assist in regional marketing, information/data dissemination, and partnership coordination/promotion

Appendices

Appendix 1 - CEDS Stakeholder Input Session Invitation 2014



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 developing the annual Economic Development District Comprehensive Economic Development Strategy (CEDS). Development of the CEDS is funded by the U.S. Department of Commerce Economic Development Administration.

The CEDS is a continuous planning process intended to analyze the regional economy, identify project opportunities, and define goals and objectives to guide economic growth in the nine-county Finger Lakes Region. A successful region is one where various groups share a vision and coordinate efforts in order to achieve that vision. The CEDS process facilitates the development of this vision through collaboration with public officials, private sector representatives, and the general public helping to form a plan of action for the Region.

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

- Ontario County Safety Training Facility
2914 County Road 48, Canandaigua, NY 14424
Tuesday, July 22 from 9:30 - 11:30 a.m.
- Ebenezer Watts Conference Center
49 South Fitzhugh Street, Rochester, NY 14614
Tuesday, July 22 from 2:00 - 4:00 p.m.
- Genesee County Building 2
3837 West Main Street Road, Batavia, NY 14020
Thursday, July 24 from 2:00 - 4:00 p.m.

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

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

Appendix 2 - CEDS Summary Sheet

**Genesee/Finger Lakes Regional Planning Council
Comprehensive Economic Development Strategy
Goals (2014)**

Goal 1: Assist in the Retention and Expansion of Existing Industries in the District

Objective 1A: Continue to work with federal, state, and local public and private sector partners to secure and leverage funding

Objective 1B: Continue to work with partners on maintaining, developing and marketing economic development programs and initiatives

Goal 2: Assist in the Attraction of Industries and Firms to the District

Objective 2A: To support organizations and/or municipalities in the attraction of firms and industries

Objective 2B: To encourage efforts to improve the economic development and business climate within New York State and the Finger Lakes Region

Goal 3: Advance the Development of Targeted Regional Clusters, including Advanced Manufacturing and Alternative Energy within the District

Objective 3A: Bolster the competitiveness of the Region's clusters

Objective 3B: Support existing Regional efforts to advance and promote Regional Clusters

Goal 4: Support Agriculture and Agri-business

Objective 4A: To continue to work with economic development partners to establish, maintain, and market programs and initiatives targeted to the advancement of agriculture and agri-business

Objective 4B: To encourage the protection of preservation of agricultural land within the District

Goal 5: Strengthen Entrepreneurship, Innovation, and Small Business Development

Objective 5A: To encourage and support entrepreneurship and the entrepreneurial spirit

Objective 5B: To provide improved financing options; technical knowledge; and support to small and medium-sized business owners

Objective 5C: To pursue opportunities to establish and advance innovation, entrepreneurship, and small business within Rural areas of the District

Goal 6: Assist in Improving the Skills of the District's Workforce

Objective 6A: To continue to support regional workforce training and workforce development efforts

Objective 6B: To support the workforce investment boards and other workforce development organizations with high-skill technical and advanced manufacturing career training programs

Goal 7: Assist in Improving the Infrastructure of the District

Objective 7A: To support the establishment of shovel-ready sites within the Region

Goal 8: Enhance Tourism and Marketing within the District

Objective 8A: To further develop the Finger Lakes Region as a destination location for visitors and new residents

Objective 8B: To further develop and promote the recreational attributes of the Region

Objective 8C: To utilize the Erie Canal as a tourism and economic development opportunity

Objective 8D: To improve and expand economic development marketing of success stories

Goal 9: Encourage Sustainable Development Practices

Objective 9A: To identify, remediate, and redevelop brownfield sites within the District

Objective 9B: To encourage efficient land use and development patterns

Objective 9C: To protect water quality

Objective 9D: To develop and implement hazard mitigation plans that complies with state and national standards

Objective 9E: To pursue opportunities for alternative energy to improve sustainability and to help lower high energy costs

Goal 10: Encourage Main Street Revitalization and Historic Preservation

Objective 10A: Help stabilize Village Main Streets and promote community development

Objective 10B: Provide stable housing opportunities within the Region

Objective 10C: Pursue opportunities for waterfront development within the Region

Objective 10D: To increase the number and success of small businesses along main streets and in community centers

Objective 10E: Pursue opportunities to advance Community Development and reduce poverty within the District

Goal 11: Strengthen Regional Coordination and Collaboration

Objective 11A: To collaborate on programs and initiatives

Objective 11B: To promote information sharing in the Region

Objective 11C: Coordinate Economic Development Activities with the Finger Lakes Regional Economic Development Council Strategic Plan

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

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

| Major Industry Sector | NAICS | Industry Subsector |
|---------------------------------|--------------|--|
| Wholesale Trade | 423 | Merchant Wholesalers, Durable Goods |
| | 424 | Merchant Wholesalers, Nondurable Goods |
| | 425 | Electronic Markets and Agents/Brokers |
| Retail Trade | 441 | Motor Vehicle and Parts Dealers |
| | 442 | Furniture and Home Furnishings Stores |
| | 443 | Electronics and Appliance Stores |
| | 444 | Building Material & Garden Supply Stores |
| | 445 | Food and Beverage Stores |
| | 446 | Health and Personal Care Stores |
| | 447 | Gasoline Stations |
| | 448 | Clothing and Clothing Accessories Stores |
| | 451 | Sporting Goods/Hobby/Book/Music Stores |
| | 452 | General Merchandise Stores |
| | 453 | Miscellaneous Store Retailers |
| | 454 | Nonstore Retailers |
| Transportation and Warehousing | 481 | Air Transportation |
| | 484 | Truck Transportation |
| | 485 | Transit and Ground Passenger Transport |
| | 486 | Pipeline Transportation |
| | 487 | Scenic and Sightseeing Transportation |
| | 488 | Support Activities for Transportation |
| | 492 | Couriers and Messengers |
| | 493 | Warehousing and Storage |
| Information | 511 | Publishing Industries |
| | 512 | Motion Picture & Sound Recording |
| | 515 | Broadcasting (except Internet) |
| | 516 | Internet Publishing and Broadcasting |
| | 517 | Telecommunications |
| | 518 | ISPs, Search Portals, & Data Processing |
| | 519 | Other Information Services |
| Finance and Insurance | 522 | Credit Intermediation & Related Activity |
| | 523 | Securities and Commodity Contracts |
| | 524 | Insurance Carriers & Related Activities |
| | 525 | Funds, Trusts & Other Financial Vehicles |
| Real Estate, Rental and Leasing | 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 Genesee-Finger Lakes 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 |
| | | |
| Educational Services | 611 | Educational Services |
| | | |
| Health Care and Social Assistance | 621 | Ambulatory Health Care Services |
| | 622 | Hospitals |
| | 623 | Nursing and Residential Care Facilities |
| | 624 | Social Assistance |
| | | |
| Arts, Entertainment and Recreation | 711 | Performing Arts and Spectator Sports |
| | 712 | Museums, Parks and Historical Sites |
| | 713 | Amusement, Gambling & Recreation |
| | | |
| Accommodation and Food Services | 721 | Accommodation |
| | 722 | Food Services and Drinking Places |
| | | |
| Other Services (except Public Administration) | 811 | Repair and Maintenance |
| | 812 | Personal and Laundry Services |
| | 813 | Membership Organizations & Associations |
| | 814 | Private Households |
| | | |
| Government | | Federal Government |
| | | State Government |
| | | Local Government |
| | | |
| Unclassified | | Unclassified |

Appendix 4 - Economic Indicators for the G-FL Region by Industry Subsector (2014)

| Table A-4 – Establishments, Employment, Average Annual Wage for the Genesee-Finger Lakes Region by Industry Subsector (2014) | | | |
|---|-----------------------|-------------------|----------------------------|
| Industry Subsector | Establishments | Employment | Average Annual Wage |
| Crop Production | 293 | 3,705 | \$28,907 |
| Animal Production | 173 | 2,660 | \$34,785 |
| Forestry and Logging | 5 | 14 | \$40,413 |
| Agriculture & Forestry Support Activity | 43 | 430 | \$24,592 |
| Mining (except Oil and Gas) | 37 | 638 | \$61,653 |
| Utilities | 47 | 1,770 | \$102,703 |
| Construction of Buildings | 854 | 5,188 | \$51,522 |
| Heavy and Civil Engineering Construction | 101 | 2,075 | \$63,797 |
| Specialty Trade Contractors | 1,707 | 12,614 | \$50,586 |
| Food Manufacturing | 131 | 5,740 | \$47,571 |
| Beverage & Tobacco Product Manufacturing | 68 | 2,617 | \$40,022 |
| Textile Mills | 9 | 346 | \$54,470 |
| Textile Product Mills | 15 | 359 | \$36,422 |
| Wood Product Manufacturing | 48 | 538 | \$32,405 |
| Paper Manufacturing | 34 | 2,078 | \$42,173 |
| Printing and Related Support Activities | 129 | 2,591 | \$46,043 |
| Petroleum & Coal Products Manufacturing | 6 | 159 | \$64,498 |
| Chemical Manufacturing | 39 | 4,650 | \$79,713 |
| Plastics & Rubber Products Manufacturing | 71 | 5,237 | \$48,983 |
| Nonmetallic Mineral Product Mfg. | 52 | 1,534 | \$48,685 |
| Primary Metal Manufacturing | 16 | 565 | \$55,022 |
| Fabricated Metal Product Manufacturing | 329 | 8,685 | \$52,539 |
| Machinery Manufacturing | 246 | 11,805 | \$77,437 |
| Computer and Electronic Product Mfg. | 118 | 10,252 | \$78,545 |
| Electrical Equipment and Appliances | 23 | 871 | \$61,007 |
| Transportation Equipment Manufacturing | 27 | 2,409 | \$49,856 |
| Furniture and Related Product Mfg. | 56 | 767 | \$39,880 |
| Miscellaneous Manufacturing | 106 | 3,645 | \$62,985 |
| Merchant Wholesalers, Durable Goods | 804 | 10,225 | \$64,808 |
| Merchant Wholesalers, Nondurable Goods | 307 | 5,202 | \$67,252 |
| Electronic Markets and Agents/Brokers | 415 | 1,808 | \$84,512 |
| Motor Vehicle and Parts Dealers | 485 | 7,742 | \$43,638 |
| Furniture and Home Furnishings Stores | 187 | 1,638 | \$31,592 |
| Electronics and Appliance Stores | 193 | 1,762 | \$36,104 |
| Building Material & Garden Supply Stores | 330 | 5,256 | \$31,090 |
| Food and Beverage Stores | 634 | 15,872 | \$20,946 |
| Health and Personal Care Stores | 336 | 3,529 | \$36,468 |
| Gasoline Stations | 377 | 2,988 | \$17,640 |
| Clothing and Clothing Accessories Stores | 436 | 4,463 | \$17,139 |
| Sporting Goods/Hobby/Book/Music Stores | 227 | 2,327 | \$16,674 |
| General Merchandise Stores | 226 | 10,988 | \$19,542 |
| Miscellaneous Store Retailers | 356 | 2,927 | \$19,776 |
| Nonstore Retailers | 148 | 1,469 | \$37,864 |

Table A-4 – Establishments, Employment, Average Annual Wage for the Genesee-Finger Lakes Region by Industry Subsector (2014) (continued)

| Industry Subsector | Establishments | Employment | Average Annual Wage |
|--|-----------------------|-------------------|----------------------------|
| Air Transportation | 12 | 135 | \$71,713 |
| Truck Transportation | 271 | 3,058 | \$42,296 |
| Transit and Ground Passenger Transport | 77 | 2,815 | \$22,426 |
| Pipeline Transportation | 10 | 35 | \$91,443 |
| Support Activities for Transportation | 63 | 685 | \$43,946 |
| Couriers and Messengers | 64 | 1,473 | \$39,029 |
| Warehousing and Storage | 55 | 1,219 | \$44,076 |
| Publishing Industries | 80 | 1,710 | \$58,252 |
| Motion Picture & Sound Recording | 53 | 427 | \$18,174 |
| Broadcasting (except Internet) | 23 | 815 | \$46,881 |
| Telecommunications | 89 | 4,155 | \$77,367 |
| ISPs, Search Portals, & Data Processing | 42 | 1,343 | \$60,391 |
| Other Information Services | 66 | 423 | \$21,222 |
| Credit Intermediation & Related Activity | 503 | 5,782 | \$59,149 |
| Securities and Commodity Contracts | 320 | 1,864 | \$144,203 |
| Insurance Carriers & Related Activities | 582 | 7,289 | \$64,081 |
| Real Estate | 932 | 5,682 | \$36,245 |
| Rental and Leasing Services | 181 | 1,527 | \$42,129 |
| Professional and Technical Services | 2,728 | 26,448 | \$64,104 |
| Management of Companies and Enterprises | 178 | 11,907 | \$94,409 |
| Administrative and Support Services | 1,503 | 26,575 | \$35,583 |
| Waste Management and Remediation Service | 118 | 1,607 | \$47,410 |
| Educational Services | 366 | 27,215 | \$55,547 |
| Ambulatory Health Care Services | 1,621 | 20,864 | \$47,872 |
| Hospitals | 15 | 27,636 | \$51,167 |
| Nursing and Residential Care Facilities | 384 | 18,696 | \$28,338 |
| Social Assistance | 674 | 13,586 | \$23,954 |
| Performing Arts and Spectator Sports | 131 | 1,263 | \$29,261 |
| Museums, Parks and Historical Sites | 27 | 740 | \$23,775 |
| Amusement, Gambling & Recreation | 343 | 5,900 | \$16,214 |
| Accommodation | 188 | 3,575 | \$20,205 |
| Food Services and Drinking Places | 2,347 | 37,935 | \$15,222 |
| Repair and Maintenance | 820 | 5,197 | \$35,931 |
| Personal and Laundry Services | 715 | 4,695 | \$23,345 |
| Membership Organizations & Associations | 995 | 8,938 | \$20,757 |
| Private Households | 342 | 531 | \$21,030 |
| Federal Government | 240 | 5,345 | \$62,990 |
| State Government | 332 | 13,654 | \$59,365 |
| Local Government | 640 | 67,674 | \$43,940 |
| Unclassified | 1,063 | 827 | \$27,735 |
| Total, All Private | 28,252 | 457,500 | \$44,643 |
| Total, All Industries | 29,464 | 544,173 | \$45,105 |

Source: Quarterly Census of Employment and Wages

Appendix 5 - Economic Indicators for the G-FL Region by Industry Subsector (2004)

| Table A-5 – Establishments, Employment, Average Annual Wage for the G-FL Region by Industry Subsector (2004) | | | |
|---|-----------------------|-------------------|-----------------------------|
| Industry Subsector | Establishments | Employment | Average Annual Wage* |
| Crop Production | 252 | 3,311 | \$23,795 |
| Animal Production | 149 | 2,116 | \$33,187 |
| Forestry and Logging | 9 | 68 | \$36,708 |
| Agriculture & Forestry Support Activity | 34 | 389 | \$31,234 |
| Mining (except Oil and Gas) | 43 | 612 | \$55,434 |
| Utilities | 21 | 2,145 | \$98,168 |
| Construction of Buildings | 778 | 5,407 | \$53,326 |
| Heavy and Civil Engineering Construction | 118 | 1,729 | \$60,336 |
| Specialty Trade Contractors | 1,757 | 11,763 | \$46,511 |
| Food Manufacturing | 121 | 6,024 | \$44,598 |
| Beverage & Tobacco Product Manufacturing | 32 | 1,744 | \$63,385 |
| Textile Mills | 6 | 266 | \$55,318 |
| Textile Product Mills | 16 | 279 | \$35,772 |
| Wood Product Manufacturing | 50 | 732 | \$36,802 |
| Paper Manufacturing | 37 | 1,759 | \$51,686 |
| Printing and Related Support Activities | 166 | 3,230 | \$48,970 |
| Petroleum & Coal Products Manufacturing | 8 | 95 | \$56,175 |
| Chemical Manufacturing | 36 | 17,471 | \$86,395 |
| Plastics & Rubber Products Manufacturing | 87 | 5,908 | \$47,678 |
| Nonmetallic Mineral Product Manufacturing | 61 | 1,713 | \$53,727 |
| Primary Metal Manufacturing | 13 | 507 | \$56,523 |
| Fabricated Metal Product Manufacturing | 321 | 8,865 | \$49,715 |
| Machinery Manufacturing | 313 | 16,919 | \$79,231 |
| Computer and Electronic Product Mfg. | 109 | 7,883 | \$75,070 |
| Electrical Equipment and Appliances | 22 | 1,476 | \$52,214 |
| Transportation Equipment Manufacturing | 30 | 6,055 | \$66,109 |
| Furniture and Related Product Manufacturing | 56 | 745 | \$39,867 |
| Miscellaneous Manufacturing | 109 | 4,559 | \$68,306 |
| Merchant Wholesalers, Durable Goods | 865 | 10,677 | \$63,226 |
| Merchant Wholesalers, Nondurable Goods | 330 | 5,286 | \$61,518 |
| Electronic Markets and Agents/Brokers | 406 | 2,010 | \$67,391 |
| Motor Vehicle and Parts Dealers | 519 | 7,899 | \$45,094 |
| Furniture and Home Furnishings Stores | 192 | 1,824 | \$32,292 |
| Electronics and Appliance Stores | 216 | 1,941 | \$38,171 |
| Building Material & Garden Supply Stores | 337 | 5,857 | \$29,990 |
| Food and Beverage Stores | 586 | 17,378 | \$19,987 |
| Health and Personal Care Stores | 271 | 3,283 | \$30,896 |
| Gasoline Stations | 434 | 3,544 | \$20,495 |
| Clothing and Clothing Accessories Stores | 464 | 4,573 | \$17,617 |
| Sporting Goods/Hobby/Book/Music Stores | 255 | 2,724 | \$18,163 |
| General Merchandise Stores | 179 | 9,451 | \$19,970 |
| Miscellaneous Store Retailers | 427 | 3,232 | \$19,776 |
| Nonstore Retailers | 130 | 1,407 | \$37,795 |

Table A-5 – Establishments, Employment, Average Annual Wage for the G-FL Region by Industry Subsector (2004) (continued)

| Industry Subsector | Establishments | Employment | Average Annual Wage* |
|--|----------------|----------------|----------------------|
| Air Transportation | 15 | 286 | \$50,953 |
| Truck Transportation | 305 | 3,232 | \$42,877 |
| Transit and Ground Passenger Transport | 54 | 2,113 | \$22,447 |
| Pipeline Transportation | 8 | 28 | \$82,458 |
| Support Activities for Transportation | 66 | 780 | \$41,763 |
| Couriers and Messengers | 50 | 1,329 | \$42,872 |
| Warehousing and Storage | 49 | 1,241 | \$36,492 |
| Publishing Industries | 105 | 3,469 | \$49,263 |
| Motion Picture & Sound Recording | 59 | 694 | \$19,406 |
| Broadcasting (except Internet) | 21 | 875 | \$51,583 |
| Telecommunications | 120 | 5,767 | \$77,796 |
| ISPs, Search Portals, & Data Processing | 82 | 930 | \$75,135 |
| Other Information Services | 43 | 286 | \$18,168 |
| Credit Intermediation & Related Activity | 478 | 7,749 | \$61,009 |
| Financial Investment & Related Activity | 221 | 1,530 | \$113,401 |
| Insurance Carriers & Related Activities | 776 | 6,128 | \$60,373 |
| Real Estate | 778 | 5,413 | \$33,829 |
| Rental and Leasing Services | 233 | 2,173 | \$33,988 |
| Professional and Technical Services | 2,584 | 23,554 | \$58,447 |
| Management of Companies and Enterprises | 155 | 10,632 | \$91,225 |
| Administrative and Support Services | 1,156 | 22,553 | \$30,868 |
| Waste Management and Remediation Service | 76 | 1,311 | \$55,385 |
| Educational Services | 311 | 22,300 | \$53,611 |
| Ambulatory Health Care Services | 1,589 | 18,442 | \$46,155 |
| Hospitals | 16 | 22,911 | \$44,302 |
| Nursing and Residential Care Facilities | 309 | 17,206 | \$27,417 |
| Social Assistance | 636 | 11,942 | \$25,736 |
| Performing Arts and Spectator Sports | 113 | 1,328 | \$27,422 |
| Museums, Parks and Historical Sites | 22 | 668 | \$23,942 |
| Amusement, Gambling & Recreation | 343 | 6,105 | \$17,589 |
| Accommodation | 156 | 3,663 | \$21,369 |
| Food Services and Drinking Places | 2,072 | 31,804 | \$14,292 |
| Repair and Maintenance | 833 | 4,542 | \$34,272 |
| Personal and Laundry Services | 690 | 4,680 | \$22,344 |
| Membership Organizations & Associations | 920 | 8,394 | \$21,635 |
| Private Households | 364 | 588 | \$19,176 |
| Federal Government | 207 | 5,617 | \$61,080 |
| State Government | 94 | 14,396 | \$60,930 |
| Local Government | 629 | 69,967 | \$43,331 |
| Unclassified | 899 | 896 | \$26,709 |
| Total, All Private | 27,111 | 454,060 | \$45,064 |
| Total, All Industries | 28,041 | 544,040 | \$45,426 |

Source: Quarterly Census of Employment and Wages * Average Annual wage expressed in 2014 dollars

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 Genesee-Finger Lakes Region by Industry Sector (2004-2014) | | | | | | |
|--|---------------------------------|----------------|-----------------------------|----------------|--|----------------|
| Industry Sector | Change in Establishments | | Change in Employment | | Change in Average Annual Wage** | |
| | Number | Percent | Number | Percent | Dollars | Percent |
| Crop Production | 41 | 16.3% | 394 | 11.9% | \$5,112 | 21.5% |
| Animal Production | 24 | 16.1% | 544 | 25.7% | \$1,598 | 4.8% |
| Forestry and Logging | -4 | -44.4% | -54 | -79.4% | \$3,705 | 10.1% |
| Agriculture Forestry Support Activity | 9 | 26.5% | 41 | 10.5% | (\$6,642) | -21.3% |
| Mining (except Oil and Gas) | -6 | -14.0% | 26 | 4.2% | \$6,219 | 11.2% |
| Utilities | 26 | 123.8% | -375 | -17.5% | \$4,535 | 4.6% |
| Construction of Buildings | 76 | 9.8% | -219 | -4.1% | (\$1,804) | -3.4% |
| Heavy and Civil Engineering Construction | -17 | -14.4% | 346 | 20.0% | \$3,461 | 5.7% |
| Specialty Trade Contractors | -50 | -2.8% | 851 | 7.2% | \$4,075 | 8.8% |
| Food Manufacturing | 10 | 8.3% | -284 | -4.7% | \$2,973 | 6.7% |
| Beverage Tobacco Product Manufacturing | 36 | 112.5% | 873 | 50.1% | (\$23,363) | -36.9% |
| Textile Mills | 3 | 50.0% | 80 | 30.1% | (\$848) | -1.5% |
| Textile Product Mills | -1 | -6.3% | 80 | 28.7% | \$650 | 1.8% |
| Wood Product Manufacturing | -2 | -4.0% | -194 | -26.5% | (\$4,397) | -11.9% |
| Paper Manufacturing | -3 | -8.1% | 319 | 18.1% | (\$9,513) | -18.4% |
| Printing and Related Support Activities | -37 | -22.3% | -639 | -19.8% | (\$2,927) | -6.0% |
| Petroleum Coal Products Manufacturing | -2 | -25.0% | 64 | 67.4% | \$8,323 | 14.8% |
| Chemical Manufacturing | 3 | 8.3% | -12,821 | -73.4% | (\$6,682) | -7.7% |
| Plastics Rubber Products Manufacturing | -16 | -18.4% | -671 | -11.4% | \$1,305 | 2.7% |
| Nonmetallic Mineral Product Mfg. | -9 | -14.8% | -179 | -10.4% | (\$5,042) | -9.4% |
| Primary Metal Manufacturing | 3 | 23.1% | 58 | 11.4% | (\$1,501) | -2.7% |
| Fabricated Metal Product Manufacturing | 8 | 2.5% | -180 | -2.0% | \$2,824 | 5.7% |
| Machinery Manufacturing | -67 | -21.4% | -5,114 | -30.2% | (\$1,794) | -2.3% |
| Computer and Electronic Product Mfg. | 9 | 8.3% | 2,369 | 30.1% | \$3,475 | 4.6% |
| Electrical Equipment and Appliances | 1 | 4.5% | -605 | -41.0% | \$8,793 | 16.8% |
| Transportation Equipment Manufacturing | -3 | -10.0% | -3,646 | -60.2% | (\$16,253) | -24.6% |
| Furniture and Related Product Mfg. | 0 | 0.0% | 22 | 3.0% | \$13 | 0.0% |
| Miscellaneous Manufacturing | -3 | -2.8% | -914 | -20.0% | (\$5,321) | -7.8% |
| Merchant Wholesalers, Durable Goods | -61 | -7.1% | -452 | -4.2% | \$1,582 | 2.5% |
| Merchant Wholesalers, Nondurable Goods | -23 | -7.0% | -84 | -1.6% | \$5,734 | 9.3% |
| Electronic Markets and Agents Brokers | 9 | 2.2% | -202 | -10.0% | \$17,121 | 25.4% |
| Motor Vehicle and Parts Dealers | -34 | -6.6% | -157 | -2.0% | (\$1,456) | -3.2% |
| Furniture and Home Furnishings Stores | -5 | -2.6% | -186 | -10.2% | (\$700) | -2.2% |
| Electronics and Appliance Stores | -23 | -10.6% | -179 | -9.2% | (\$2,067) | -5.4% |
| Building Material Garden Supply Stores | -7 | -2.1% | -601 | -10.3% | \$1,100 | 3.7% |
| Food and Beverage Stores | 48 | 8.2% | -1,506 | -8.7% | \$959 | 4.8% |
| Health and Personal Care Stores | 65 | 24.0% | 246 | 7.5% | \$5,572 | 18.0% |
| Gasoline Stations | -57 | -13.1% | -556 | -15.7% | (\$2,855) | -13.9% |
| Clothing and Clothing Accessories Stores | -28 | -6.0% | -110 | -2.4% | (\$478) | -2.7% |
| Sporting Goods Hobby Book Music Stores | -28 | -11.0% | -397 | -14.6% | (\$1,489) | -8.2% |
| General Merchandise Stores | 47 | 26.3% | 1,537 | 16.3% | (\$428) | -2.1% |
| Miscellaneous Store Retailers | -71 | -16.6% | -305 | -9.4% | (\$0) | 0.0% |
| Nonstore Retailers | 18 | 13.8% | 62 | 4.4% | \$69 | 0.2% |

Table A-6 – Change in Establishments, Employment, and Average Annual Wage in the Genesee-Finger Lakes Region by Industry Sector (2004-2014)
(continued)

| Industry Sector | Change in Establishments | | Change in Employment | | Change in Average Annual Wage** | |
|--|--------------------------|-------------|----------------------|-------------|---------------------------------|--------------|
| | Number | Percent | Number | Percent | Dollars | Percent |
| Air Transportation | -3 | -20.0% | -151 | -52.8% | \$20,760 | 40.7% |
| Truck Transportation | -34 | -11.1% | -174 | -5.4% | (\$581) | -1.4% |
| Transit and Ground Passenger Transport | 23 | 42.6% | 702 | 33.2% | (\$21) | -0.1% |
| Pipeline Transportation | 2 | 25.0% | 7 | 25.0% | \$8,985 | 10.9% |
| Support Activities for Transportation | -3 | -4.5% | -95 | -12.2% | \$2,183 | 5.2% |
| Couriers and Messengers | 14 | 28.0% | 144 | 10.8% | (\$3,843) | -9.0% |
| Warehousing and Storage | 6 | 12.2% | -22 | -1.8% | \$7,584 | 20.8% |
| Publishing Industries | -25 | -23.8% | -1,759 | -50.7% | \$8,989 | 18.2% |
| Motion Picture Sound Recording Ind. | -6 | -10.2% | -267 | -38.5% | (\$1,232) | -6.4% |
| Broadcasting (except Internet) | 2 | 9.5% | -60 | -6.9% | (\$4,702) | -9.1% |
| Telecommunications | -31 | -25.8% | -1,612 | -28.0% | (\$429) | -0.6% |
| ISPs, Search Portals, Data Processing | -40 | -48.8% | 413 | 44.4% | (\$14,744) | -19.6% |
| Other Information Services | 23 | 53.5% | 137 | 47.9% | \$3,054 | 16.8% |
| Credit Intermediation Related Activity | 25 | 5.2% | -1,967 | -25.4% | (\$1,860) | -3.0% |
| Securities and Commodity Contracts | 99 | 44.8% | 334 | 21.8% | \$30,802 | 27.2% |
| Insurance Carriers Related Activities | -194 | -25.0% | 1,161 | 18.9% | \$3,708 | 6.1% |
| Real Estate | 154 | 19.8% | 269 | 5.0% | \$2,416 | 7.1% |
| Rental and Leasing Services | -52 | -22.3% | -646 | -29.7% | \$8,141 | 24.0% |
| Professional and Technical Services | 144 | 5.6% | 2,894 | 12.3% | \$5,657 | 9.7% |
| Management of Companies and Enterprises | 23 | 14.8% | 1,275 | 12.0% | \$3,184 | 3.5% |
| Administrative and Support Services | 347 | 30.0% | 4,022 | 17.8% | \$4,715 | 15.3% |
| Waste Management and Remediation Service | 42 | 55.3% | 296 | 22.6% | (\$7,975) | -14.4% |
| Educational Services | 55 | 17.7% | 4,915 | 22.0% | \$1,936 | 3.6% |
| Ambulatory Health Care Services | 32 | 2.0% | 2,422 | 13.1% | \$1,717 | 3.7% |
| Hospitals | -1 | -6.3% | 4,725 | 20.6% | \$6,865 | 15.5% |
| Nursing and Residential Care Facilities | 75 | 24.3% | 1,490 | 8.7% | \$921 | 3.4% |
| Social Assistance | 38 | 6.0% | 1,644 | 13.8% | (\$1,782) | -6.9% |
| Performing Arts and Spectator Sports | 18 | 15.9% | -65 | -4.9% | \$1,839 | 6.7% |
| Museums, Parks and Historical Sites | 5 | 22.7% | 72 | 10.8% | (\$167) | -0.7% |
| Amusement, Gambling Recreation Ind. | 0 | 0.0% | -205 | -3.4% | (\$1,375) | -7.8% |
| Accommodation | 32 | 20.5% | -88 | -2.4% | (\$1,164) | -5.4% |
| Food Services and Drinking Places | 275 | 13.3% | 6,131 | 19.3% | \$930 | 6.5% |
| Repair and Maintenance | -13 | -1.6% | 655 | 14.4% | \$1,659 | 4.8% |
| Personal and Laundry Services | 25 | 3.6% | 15 | 0.3% | \$1,001 | 4.5% |
| Membership Organizations Associations | 75 | 8.2% | 544 | 6.5% | (\$878) | -4.1% |
| Private Households | -22 | -6.0% | -57 | -9.7% | \$1,854 | 9.7% |
| Federal Government | 33 | 15.9% | -272 | -4.8% | \$1,910 | 3.1% |
| State Government | 238 | 253.2% | -742 | -5.2% | (\$1,565) | -2.6% |
| Local Government | 11 | 1.7% | -2,293 | -3.3% | \$609 | 1.4% |
| Unclassified | 164 | 18.2% | -69 | -7.7% | \$1,026 | 3.8% |
| Total, All Private | 1141 | 4.2% | 3,440 | 0.8% | (\$421) | -0.9% |
| Total, All Industries | | | | | | |

Source: Quarterly Census of Employment and Wages ** Average Annual wage expressed in 2014 dollars

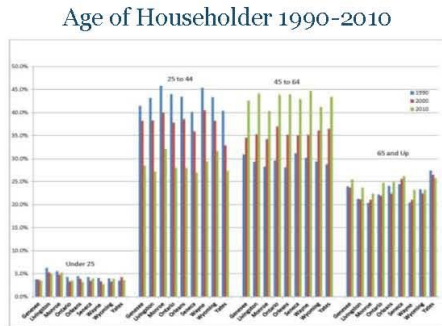
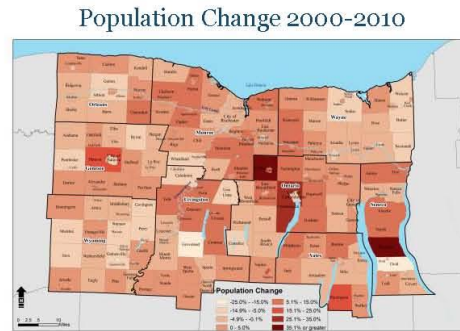
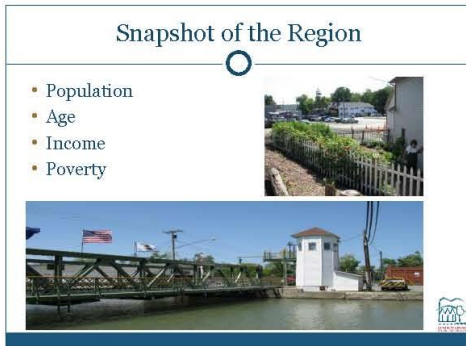
Appendix 7 - Stakeholder Input Session Attendees, 2014

| Table A-7 – CEDS Stakeholder Input Session, Attendee List, 2014 | |
|--|--|
| Name | Organization and/or Affiliation |
| Bob McNary | Wayne County Economic Development & Planning |
| Brian Young | Finger Lakes Works- Ontario County |
| John Sheppard | Town of Seneca |
| Robert Aronson | Seneca County Industrial Development Agency |
| J. Diaz Herrera | Keuka College |
| Sue Vary | Ontario County Economic Development |
| John Johnson | Cornell Ag-Tech Farm |
| Mike Manikowski | Ontario County Economic Development |
| Diane Lagener | Wayne County Business Council |
| Christine Lachnicht | Wayne County Business Council |
| Mitch Donovan | Victor Chamber of Commerce |
| Kathy Rayburn | Victor Economic Development |
| Louie Freeman | Cornell Cooperative Extension Livingston County |
| Sarah Clark | Senator Gillibrand's Office |
| Laura Lane | Livingston County Chamber of Commerce |
| Jody Binnix | Genesee Transportation Council |
| Hubert Van Tol | Pathstone Enterprise |
| Kelly Mandarano | Kodak/Eastman Business Park |
| Andy Harlan | RIT CIMS |
| Cynthia Gary | University of Rochester |
| Peter Pecor | Rochester Works |
| Peg Churchill | Wayne County Industrial Development Agency |
| Don Naetzker | SWBR Architects |
| Jim Whipple | Orleans Economic Development Agency |
| Bruce Schmidt | Town of Gaines |
| Lynne Johnson | Orleans County Legislature |
| Carol Culhane | Town of Gaines |
| Stephen Barbeau | Town of LeRoy |
| Jarred Jones | Senator Gillibrand's Office |
| Derik Kane | Genesee County Planning |
| Art Buckley | Wyoming County Planning |
| Felipe Oltramari | Genesee County Planning |
| Mark Masse | Genesee County Economic Development Center |
| Beverly Mancuso | Cornell Cooperative Extension Genesee County |
| Esther Leadley | G/FLRPC At Large Member |
| Doug Finch | Town of Canandaigua |
| Thomas Lyon | Canandaigua Chamber of Commerce |
| Jack Marren | Town of Victor/Ontario County Board of Supervisors |
| Alison Gremis | Canandaigua Chamber of Commerce |
| Tom Harvey | Ontario County Planning |
| Ron Brand | Town of Farmington |

Appendix 8 - CEDS Stakeholder Input Session Presentation, 2014

8/18/2014





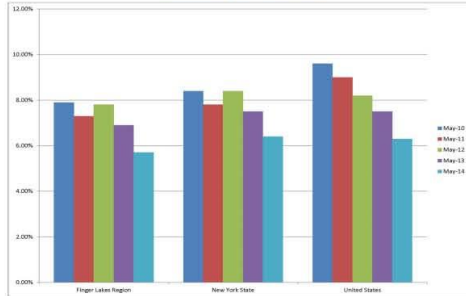
Per Capita Personal Income

| | Per Capita Income (\$) | |
|----------------|------------------------|--------|
| | 2000* | 2010 |
| Genesee | 30,587 | 32,940 |
| Livingston | 28,918 | 30,706 |
| Monroe | 39,032 | 42,083 |
| Ontario | 35,622 | 39,730 |
| Orleans | 26,128 | 28,381 |
| Seneca | 29,050 | 33,886 |
| Wayne | 31,364 | 34,649 |
| Wyoming | 24,614 | 29,150 |
| Yates | 25,750 | 30,259 |
| G-FL Region | 35,643 | 38,826 |
| New York State | 43,851 | 48,596 |
| United States | 38,391 | 39,937 |

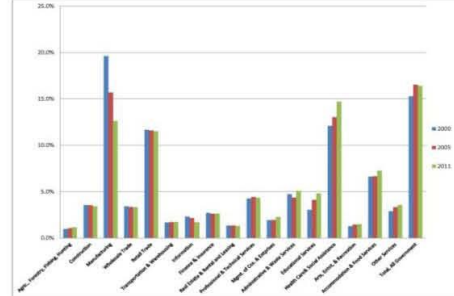
*Adjusted for inflation and expressed in 2010 dollars



Unemployment



Employment by Industry- Genesee-Finger Lakes Region



Regional Clusters

- Optics and Imaging
- Alternative Energy
- Advanced Manufacturing
- Agribusiness and Food Processing
- Information and Communication Technology
- Biotech and Life Sciences



Snapshot of the Region

- Quality of Life
- Education
- Health Services
- Parks and Recreation
- Cultural & Tourist Attractions



Developing a Vision

- 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?
 - What resources are available?



Developing a Vision

- 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 project priorities?
- What strategies can be employed to reach goals?
- How should we measure how we are doing?



Current CEDS Goals

- Goal 1:** Assist in the Retention and Expansion of Existing Industries
- Goal 2:** Assist in the Attraction of Industries and Firms
- Goal 3:** Support Agriculture and Agribusiness
- Goal 4:** Strengthen Entrepreneurship and Innovation and Small Business Development
- Goal 5:** Assist in the improving the Skills of the District's Workforce
- Goal 6:** Assist in Improving the Infrastructure of the District
- Goal 7:** Enhance Tourism and Marketing Efforts within the District
- Goal 8:** Strengthen Regional Coordination and Collaboration
- Goal 9:** Encourage Sustainable Development Practices
- Goal 10:** Encourage Main Street Revitalization and Historic Preservation



Current Performance Measures

1. Number of CEDS initiatives successfully implemented
2. Types of projects that were implemented
3. Number of brownfield projects implemented
4. Number of technology projects implemented
5. Number of jobs created/retained
6. Amount of private sector investment within implemented projects
7. Amount of public sector investment within implemented projects
8. Socio-economic and demographic data within the Region
9. Amount of G/FLRPC revolving loan leveraged
10. Amount of grant funding secured



Next Steps

- July/August 2014: Meet with County Stakeholders
- August 2014: Integrate feedback and comments
- September 2014: Submit draft report to G/FLRPC for review and comments
- October 2014: Public Review
- December 2014: Final draft completed and submitted to G/FLRPC
- December 2014: Final draft submitted to EDA



Contact Information

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Appendix 9 - CEDS Stakeholder Input Session Notes, 2014

CEDS Stakeholder Input Sessions were held July 22nd and July 24th, 2014 in Rochester, Canandaigua, 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. The list below consists of the compilation of comments from the three input session with duplicate comments removed to improve readability.

Strengths

- Restoration of older buildings to active use (Town of Gaines) (6.2 Goal 10)
- Location along Lake Ontario (6.2 Goal 8)
- Proximity to Canada and Toronto (6.2 Goal 2)
- Access to low cost hydro-power for counties of Orleans, Genesee, & Wyoming (6.2 Goal 2)
- Access to fresh water (6.2 Goal 8)
- Agribusiness/Agriculture (6.2 Goal 4)
- Sewer capacity (6.2 Goal 7)
- Availability of workforce (connections to Buffalo and Rochester) (6.2 Goal 6)
- Climate (few natural disasters) (6.2 Goal 4)
- Favorable topography (6.2 Goal 4)
- Proximity to distribution (interstate highways/rail/airports) (6.2 Goal 2)
- Greenspace (6.2 Goal 8)
- New York State Wine Trail (6.2 Goals 4 and 8)
- Quality of education system (6.2 Goal 6)
- Unique historical character/historical properties (6.2 Goal 10)
- Green energy industry (6.2 Goal 3)
- Quick movement on local permitting and zoning in some jurisdictions (6.2 Goal 2)
- Regional collaboration (6.2 Goal 11)
- Workforce training and degree programs through community colleges and universities (6.2 Goal 6)
- Strong regional health system (6.2 Goal 8)
- Investing in Manufacturing Communities Partnership designation (6.2 Goal 3)
- Connections between economic development and workforce development (6.2 Goal 6)
- Collaboration amongst workforce investment boards (6.2 Goal 6)
- START-UP NY designations (6.2 Goal 2)
- Innovation Hotspot designation (6.2 Goal 4)
- Finger Lakes Regional Economic Development Council Strategic plan (6.2 Goals 2, 7, and 11)
- Highly skilled workforce (6.2 Goal 6)
- Infrastructure/broadband (6.2 Goal 7)
- Natural resources (6.2 Goal 8)
- Prime agricultural soils (6.2 Goal 4)
- Supply chain connections with industries (6.2 Goal 2)
- Food processing (6.2 Goal 4)
- Low cost of living (6.2 Goal 8)
- Eastman Business Park (low cost utilities & on-site rail) (6.2 Goal 2)
- Strong regional clusters (photonics, agriculture, science & technology, & others) (6.2 Goal 3)

- Resilient economy (diversity of industries) (6.2 Goal 2)
- Rochester Technology and Manufacturing Association (6.2 Goal 6)
- Dairy production (6.2 Goal 4)
- Small Business Innovation Research (SBIR) (6.2 Goal 5)
- Innovation (6.2 Goal 4)
- Education (6.2 Goal 6)
- Healthcare (6.2 Goal 8)
- Economic momentum (6.2 Goals 1-10)
- Commercialization of products from many companies (advancing past divide) (6.2 Goal 4)
- Information and communications technology (6.2 Goal 3)
- Access Ontario and connections with Southern Tier Network and Yates County in the future (6.2 Goal 7)
- Dark fiber connections within the Region and to Syracuse (6.2 Goal 7)
- Colleges and Universities/Higher education (6.2 Goal 6)
- Diversity of educational components/programs (6.2 Goal 6)
- Workforce Investment Boards (6.2 Goal 6)
- Workforce development programs (6.2 Goal 2)
- FAME (6.2 Goal 6)
- Finger Lakes works with their hands (6.2 Goal 6)
- Cornell University (Cooperative extensions & Agriculture and Food Technology Park) (6.2 Goal 6)
- Science and technology and innovation and the connections to higher education (6.2 Goal 6)
- Smart System Technology & Commercialization Center (STC) (6.2 Goal 4)
- Diversity of housing stock (6.2 Goal 10)
- Diversity of agriculture (dairy, apples, etc.) (6.2 Goal 4)
- Tourism (6.2 Goal 8)
- Agricultural tourism (6.2 Goal 8)
- Foreign trade zones (6.2 Goal 2)
- Quality of life (6.2 Goal 8)
- Work ethic (6.2 Goal 6)
- Limited traffic congestion (6.2 Goal 8)

Weaknesses

- Access to reliable capital for businesses/limited venture capital (6.2 Goal 4)
- Aging population (6.2 Goal 2)
- Mismatch of housing stock to market demands (6.2 Goal 10)
- Older housing stock in need of repairs and upkeep (6.2 Goal 10)
- High taxes (6.2 Goal 2)
- Large number of rental properties (6.2 Goal 10)
- Population decline (6.2 Goal 8)
- Brownfield properties (6.2 Goal 9)
- Limited public transportation options in some communities (6.2 Goal 7)
- Workforce with limited middle skills (6.2 Goal 6)
- High concentrations of poverty in the City of Rochester (6.2 Goal 10)
- Low high-school graduation rate in many school districts (6.2 Goal 6)
- Limited internship opportunities (6.2 Goal 6)
- Limited soft skills within workforce (6.2 Goal 6)

- Mismatch between high school curriculum and job readiness training/job opportunities (6.2 Goal 6)
- High energy costs (6.2 Goal 9)
- Negative public perception (6.2 Goal 8)
- Limited middle class housing (Yates County) (6.2 Goal 10)
- Disparity in economy amongst 9 county Region (6.2 Goals 1-11)
- Limited preparation for next generation agricultural jobs (6.2 Goal 4)
- Aging infrastructure (sewer& water, highways, bridges) (6.2 Goal 7)
- Wages from tourism jobs low (part-time, seasonal) (6.2 Goal 8)
- Limited Main Street retail options after 5 p.m. (6.2 Goal 10)

Opportunities

- Green Energy/Alternative Energy industry growth (6.2 Goal 3)
- Dredging of harbors (6.2 Goal 8)
- Commercialization of Entrepreneurship opportunities (6.2 Goal 3)
- Brownfield redevelopment (6.2 Goal 9)
- Improved marketing of economic development success stories and the associated jobs and investment (6.2 Goal 8)
- Improve marketing strategies for economic development (6.2 Goal 8)
- Workforce development in areas of skilled trades; agriculture; and manufacturing (6.2 Goal 6)
- Implementation of economic development strategies (6.2 Goals 2 and 11)
- Smart Growth (6.2 Goal 9)
- Update of zoning regulations and comprehensive plans (6.2 Goal 9)
- Consolidation of services/shared services (6.2 Goal 9)
- Aging in Place strategies (6.2 Goal 2)
- Livable Communities initiatives (6.2 Goal 9)
- Recreational lands and water (6.2 Goal 8)
- Leveraging year-round seasonal recreational opportunities for tourism (6.2 Goal 8)
- Increase tourism visitors and spending (6.2 Goal 8)
- Local food production/consumption (farm to table) (6.2 Goal 4)
- Waste to energy (6.2 Goal 9)
- Leveraging the IMCP designation (6.2 Goal 3)
- Leveraging START UP NY to attract jobs and investment (6.2 Goal 2)
- Alignment of CEDS with FLREDC plan for matching funds and implementation of goals (6.2 Goal 11)
- Attraction of 18-24 age demographic (6.2 Goal 8)
- Increased connections to global economy through programs such as GLOBAL-NY and foreign trade zones (6.2 Goal 2)
- Leveraging the Nano-manufacturing production occurring in the Town of Greece (6.2 Goal 3)
- Improved collaboration amongst the 9-county Region for implementation of economic development goals (6.2 Goal 11)
- Positive self-promotion (6.2 Goal 8)
- Continued growth in wine, beer, and spirits industries (6.2 Goal 4)
- Continued growth in the yogurt industry (6.2 Goal 4)
- Expand shovel-ready development to reduce wait times for new businesses (6.2 Goal 7)
- Reduce permitting time for development (6.2 Goal 2)
- Public/private partnerships for alternative energy (6.2 Goal 9)

- Improve access to new markets (6.2 Goal 2)
- Expand/improve branding of clusters beyond the Region (6.2 Goal 3 and 8)
- Improve the connections between higher education and research (6.2 Goal 6)
- Commercialization of patents (6.2 Goal 5)
- Apply workforce development best practices such as Tennessee Technology program (6.2 Goal 6)
- Development of an innovation corridor (6.2 Goal 5)
- Implementation of the Regional Sustainability Plan (6.2 Goal 9)
- Improve access to health care/affordable child-care (6.2 Goal 10)
- Establishment of a Regional Agriculture RLF (6.2 Goal 4)
- Expand connections between high school graduates and advanced manufacturing (FAME) (6.2 Goal 6)
- Improve connections between 4-year colleges and existing job opportunities (6.2 Goal 6)
- Establish business to business connections to help capture increased sales tax (6.2 Goal 10)
- Become truly regional with partnerships and coordination beyond county borders (6.2 Goal 11)
- Internal harvesting/Economic gardening to help growth-oriented companies expand (6.2 Goal 5)
- Retention and attraction of business (6.2 Goals 1 and 2)
- Encourage small retailers to embracing internet sales (6.2 Goal 10)
- Sustainable economic development (6.2 Goal 9)
- Expand traditional energy (nuclear, natural gas) (6.2 Goal 9)
- Regionalization of transportation system (Ontario County moving to RTS) (6.2 Goal 7)
- Coordinate New York State tourism marketing with regional and local efforts (6.2 Goal 8)
- Expansion of internship opportunities through colleges and universities (6.2 Goal 6)
- Centralizing economic development programs/departments (6.2 Goal 2)
- Utilization of rail network and short line railroads (6.2 Goal 7)

Threats

- Slow movement on projects (state regulations, etc.) (6.2 Goal 2)
- Limited funding opportunities (EDA other agencies, etc.) (6.2 Goals 1-11)
- Inability to advance companies beyond start-up phase to being a large employer (6.2 Goal 5)
- Fear of failure (6.2 Goal 5)
- Potential Development of prime agricultural land (perception of agriculture land as “vacant”) (6.2 Goal 9)
- Failure to meet maximum capabilities of agricultural soils (inefficient returns) (6.2 Goal 4)
- Population decline (6.2 Goal 8)
- Aging population (6.2 Goal 2)
- Brownfields and vacant properties (6.2 Goal 9)
- Public transportation disconnect with aging population (6.2 Goal 7)
- Lack of coordination amongst public transportation options (6.2 Goal 7)
- Limited understanding amongst the public of economic development incentives (6.2 Goal 8)
- Decline of skilled workforce (skilled trades) (6.2 Goal 6)
- Decline in volunteers (6.2 Goal 8)
- Out-dated zoning laws (6.2 Goal 9)
- Over-abundance of agencies/organizations/decision makers (6.2 Goal 2)
- Government regulations (EPA navigable waters) (6.2 Goal 10)
- Inefficient State permitting & zoning regulations (6.2 Goal 2)
- Invasive species (6.2 Goal 9)
- Waste stream (large amount of waste within the Region landfills) (6.2 Goal 9)

- Toxic waste materials within the Region (6.2 Goal 9)
- Lack of immigration reform (impacting availability of workforce especially in agriculture and advanced manufacturing sectors) (6.2 Goal 6)
- Out-migration of population to other cities and regions (brain drain) (6.2 Goal 8)
- Lack of venture capital (6.2 Goal 5)
- Economic development incentives from outside regions (6.2 Goal 2)
- Aging infrastructure (bridges, water and sewer) (6.2 Goal 7)
- Lack of vocational training and middle skills development (6.2 Goal 6)
- Limited rural connectivity (broadband and transportation) (6.2 Goal 6)
- Over-reliance on job creation as measurement of project successes (6.2 Goal 8)
- Disproportionate funding awards between Monroe County and Region (6.2 Goal 1)
- Ending of energy subsidies (6.2 Goal 2)
- Continued income disparity (6.2 Goal 10)
- Disconnect between k-12 education and job opportunities (6.2 Goal 6)
- Perception that all students should go to college (6.2 Goal 6)
- Lack of regional identity beyond the nine counties (6.2 Goal 8)
- Impact of online-sales on local sales-tax revenue (6.2 Goal 10)
- Impact of climate change on energy and agriculture (6.2 Goal 2)
- Property tax cap (6.2 Goal 2)
- Decline in school district enrollment (fewer children from young professionals) (6.2 Goal 8)
- Declining middle class (6.2 Goal 10)

