

Genesee-Finger Lakes Region

4.1a Existing Conditions Introduction

The Background/Existing Conditions section below outlines the demographic and economic conditions within the Finger Lakes Region utilizing available data from a variety of sources including, but not limited to the U.S. Census Bureau; New York State Department of Labor; and Bureau of Labor Statistics. These demographic and economic indicators include population change; employment; unemployment; race; age; vacancy; education; income; poverty; and economic distress. Additional background information for the Region includes community features such as brownfields, natural resources, land use, and infrastructure; land cover; and currently engaged New York State Department of State projects/programs.

Additional details related to socio-economic, demographic, and employment indicators along with detailed discussion about community goals, objectives, needs, gaps, and priority actions can be found within each of the county Revitalization Opportunity Reports. The complete data tables are available in Appendix A.

Profile of Existing Conditions

The Genesee-Finger Lakes Region consists of 4,692 square miles¹ of area located in the west-central New York State. The Region is bordered by Lakes 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.

Between the years 2000 and 2010 the Genesee-Finger Lakes Region's population increased by 1.5% to 1,217,156². During this same period New York State experienced a population increase of 2.1% and the United States saw growth of 9.7%³. Based upon Quarterly Census of Employment and Wages (QCEW) data, which notably excludes agricultural workers on small farms⁴, within the Genesee-Finger Lakes Region much of the population is employed in the industry sectors of government, including local, state, and federal government; health care and social assistance, including hospitals and ambulatory health care services; manufacturing, including machinery manufacturing, computer and electronic product manufacturing, and fabricated metal product manufacturing; retail trade, including food and beverage stores and general merchandise stores; and accommodation and food services⁵. Table 1 illustrates Genesee-Finger Lakes Region Employment.

Table 1: 2012 Employment Finger Lakes Region

| Industry Sector | Avg. Annual Employment |
|-----------------------------------|------------------------|
| Total, All Government | 86,875 |
| Health Care and Social Assistance | 78,753 |
| Manufacturing | 67,425 |
| Retail Trade | 62,036 |
| Accommodation and Food Services | 39,477 |

The largest employers in the Region include: the University of Rochester; Wegman's Food Markets; Rochester General Health; Xerox; and Unity Health System⁶. The unemployment rate for the Genesee-Finger Lakes Region as of November 2015 was 4.6%, in line with the New York State unemployment rate of 4.7%⁷, and lower than the national unemployment rate of 5.0%⁸. Table 1 illustrates Genesee-Finger Lakes Employment.

The Genesee-Finger Lakes Region is predominately white (83.1%)⁹ and has an aging population, with approximately 14.4% of the Region population aged 65 or older, greater than the 13.6% of the population aged 65 or older in New York State and the 13.2% of the population aged 65 or older in the United States¹⁰. Vacancy is not a huge concern within Region as a whole with only 6.9% of the structures classified as vacant compared to 7.2% vacancy rate in New York State and 8.7% vacancy rate in the Nation¹¹.

Approximately 88.9% of the Region's population 25 years old or older has at least a high school diploma or equivalency with 30.4% of the Region having a bachelor's degree, graduate degree, or professional degree and approximately 41.9% having an educational attainment of an associate's degree or higher. Within New York State approximately 84.9% of the population aged 25 or older has at least a high school diploma with 32.8% having a bachelor's degree or greater in education and 41.1% having an associate's degree or greater¹².

Within the Region, median household income was highest in Ontario County (\$56,455) and Livingston County (\$54,244). The lowest median household income within the Region was in Yates County (\$48,245) and Seneca County (\$49,155). A regional median household income computation was unavailable due to data limitations¹³.

Approximately 13.3% of the Region population and 18.7% of the population under the age of 18 are living

below the poverty level, lower than the national poverty rate of 14.9% and the national rate of poverty of 20.8% for those under the age of 18¹⁴.

Economic Distress

Economic distress can be measured using a variety of data, such as unemployment rates, income levels, vacancy rates, or poverty status. These indicators alone however fail to capture positive trends that may help to reduce economic distress such as a growing population or a highly educated workforce. In order to account for all of these variables, G/FLRPC developed an economic distress index which includes the following data: median family income; employment rate; non-poverty rate; educational attainment; occupancy rate; and population change.

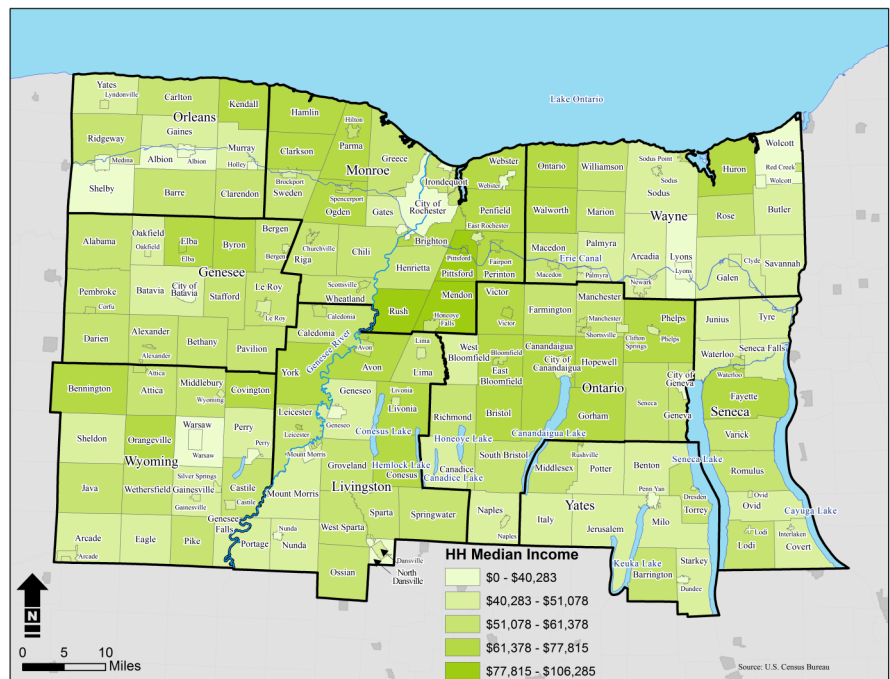
Each of these data components were standardized into a z-score, which accounts for standard deviation amongst each category and sets 0 as the average. The z-scores for each data category were then summed to determine the economic distress index value for each municipality. Positive numbers indicate a higher than average level of economic distress. It is important to note that the economic distress index is a snapshot based upon the currently available data and the index will continually evolve as economic conditions fluctuate and new data is released. It is also important to note that since the economic distress index relies upon estimated Census American Community Survey data there is a margin of error within the reported numbers.

For the nine-county Finger Lakes Region as a whole the Economic Distress z-scores ranged from -12.9 (least distressed) to 9.6 (most distressed). Within the Region the areas with the highest Economic Distress z-scores included the Village of Dresden; City of Rochester; Town of Butler; Village of Perry; Village of Clyde; and the Town of Albion¹⁵.

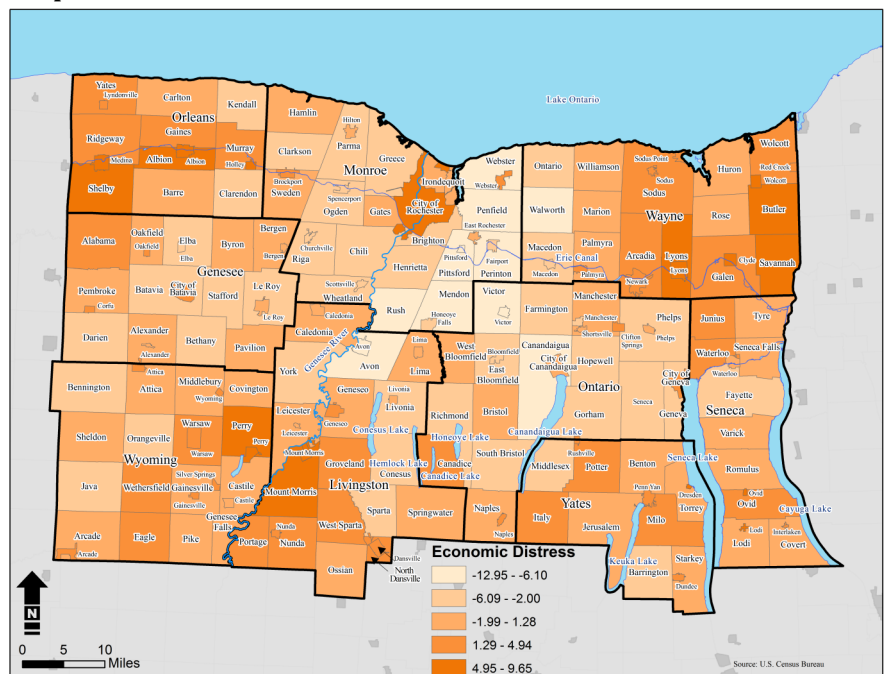
Strategies

The background/existing conditions section above provides a snapshot of current demographic and economic data for the Genesee-Finger Lakes Region. It does not, however, provide a detailed glimpse of the economic development; community development; and land use challenges that the Region is facing. In order to explore these areas in more detail Genesee/Finger

Map 1: 2012 Median Household Income



Map 2: Economic Distress Index



Lakes Regional Planning Council (G/FLRPC) identified 11 subject areas to explore in greater length. These subject areas are: Land Use; Brownfields; Economic Distress; Downtowns; Tourism and Recreation; Waterfronts; Environmental, Water Resources, and Natural Resources; Energy; Buildings and Housing; Infrastructure; and Preservation/Cultural. Each of these subject areas are discussed briefly below within a regional context, with additional detailed discussion occurring within each of the nine individual county Revitalization Opportunity Reports.

Land Use

Based upon an analysis of building permit data for the Genesee-Finger Lakes Region since 1998, the municipalities with the most residential building permits issued are the Towns of Webster (3,398); Greece (3,289); Henrietta (3,105); Penfield (2,338); and Victor (2,217). This data merely identifies the number of permits granted and does not mean the proposed development was actually completed, but it does help to show the areas within the Region which are likely experiencing the most residential growth. Map 3 illustrates the number of residential buildings permits issued within the Region from 1998-2014.

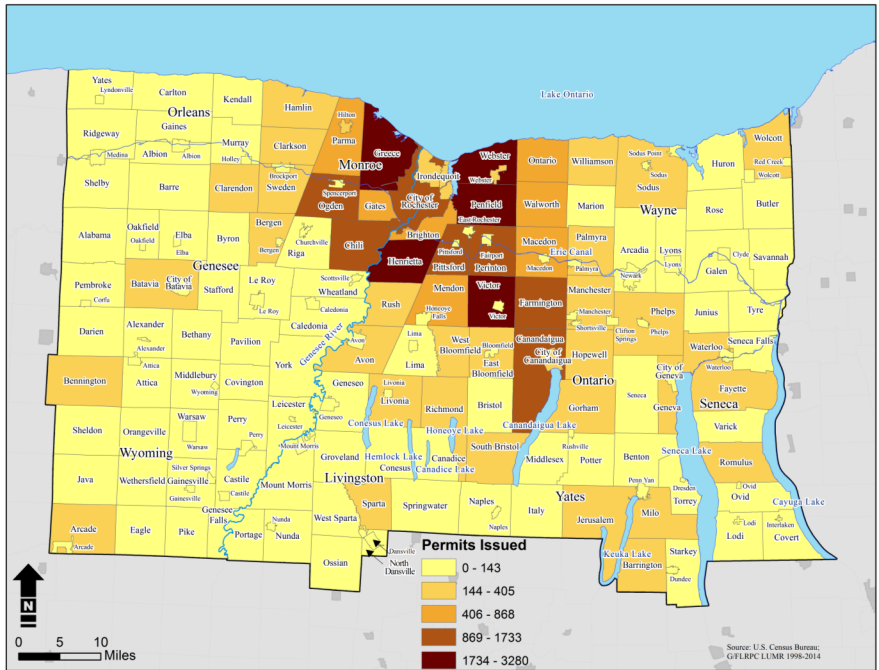
Map 4 illustrates the generalized municipal zoning within the Region, showing generally how areas of the Region are zoned, including agricultural areas, residential areas, commercial/business areas, and municipalities without zoning. The map helps to show areas of the Region that have experienced growth or where growth is likely to occur.

Map 5 illustrates the land cover of the Region helping to illustrate the areas of the Region that are urban/built up, along with the areas that are mostly open space or agricultural land.

Each of these maps provides background of land use within the Region which shapes the Land Use subject area discussions within each of the County Revitalization Opportunity Area reports.

Each of the County Revitalization Opportunity reports also discusses the importance of agricultural land and the agricultural and food processing industry to the Region as a whole. The land use subject area of the County Revi-

Map 3: Residential Building Permits 1998-2014 by Municipality



Map 4: Generalized Municipal Zoning

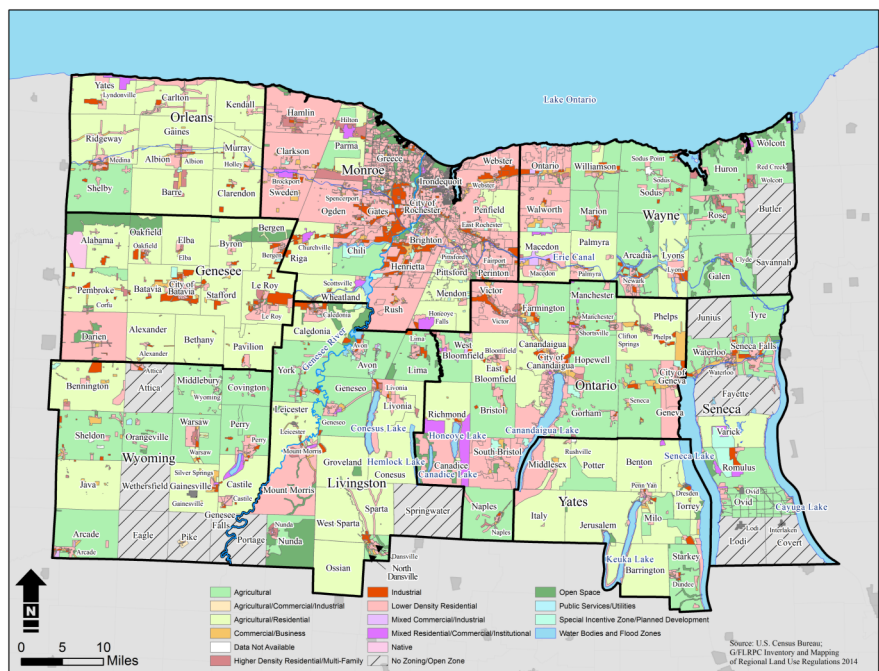


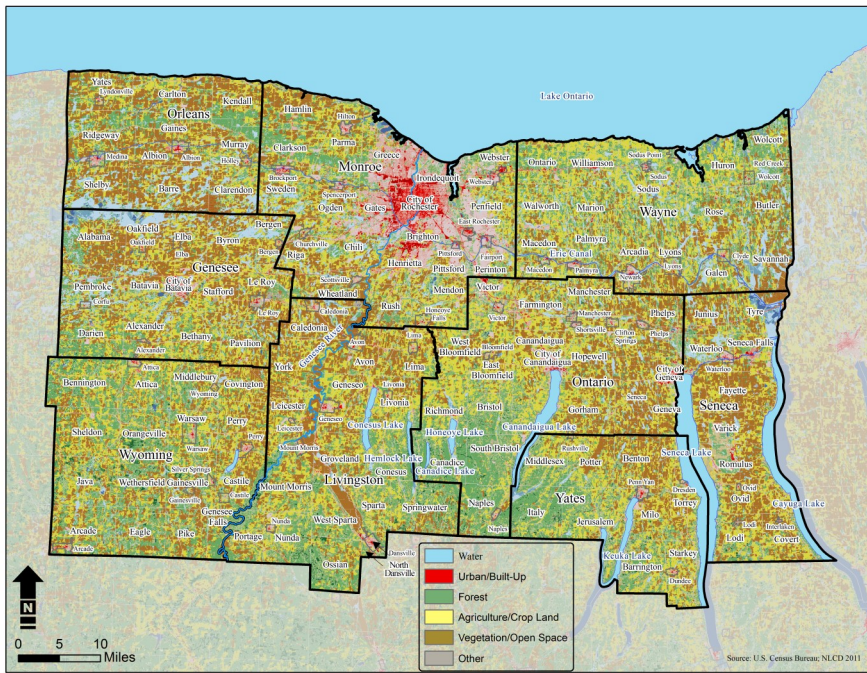
Table 2: Residential Building Permits

| Municipality | Residential Building Permits 1998-2014 |
|-------------------|--|
| Town of Webster | 3,398 |
| Town of Greece | 3,289 |
| Town of Henrietta | 3,105 |
| Town of Penfield | 2,338 |
| Town of Victor | 2,217 |

talization Opportunity Report also reference goals and objectives from existing land use plans including agricultural and farmland protection plans within the Region.

Brownfields

There are a number of identified brownfield properties located throughout the nine-county Genesee-Finger Lakes Region. Map 6 illustrates the location of some of these brownfield sites that have been identified by the New York State Department of Environmental Conservation. Each of the sites depicted on the map

Map 5: Land Cover

velopment Council Strategic Plan titled *Accelerating our Transformation*, and the Genesee-Finger Lakes Regional Economic Development District Comprehensive Economic Development Strategy.

Downtowns

Key goals and the revitalization of downtowns are discussed within each of the County Revitalization Opportunity reports. The downtown subject area sections also focus on activities from key community development groups such as business improvement districts or local chambers of commerce.

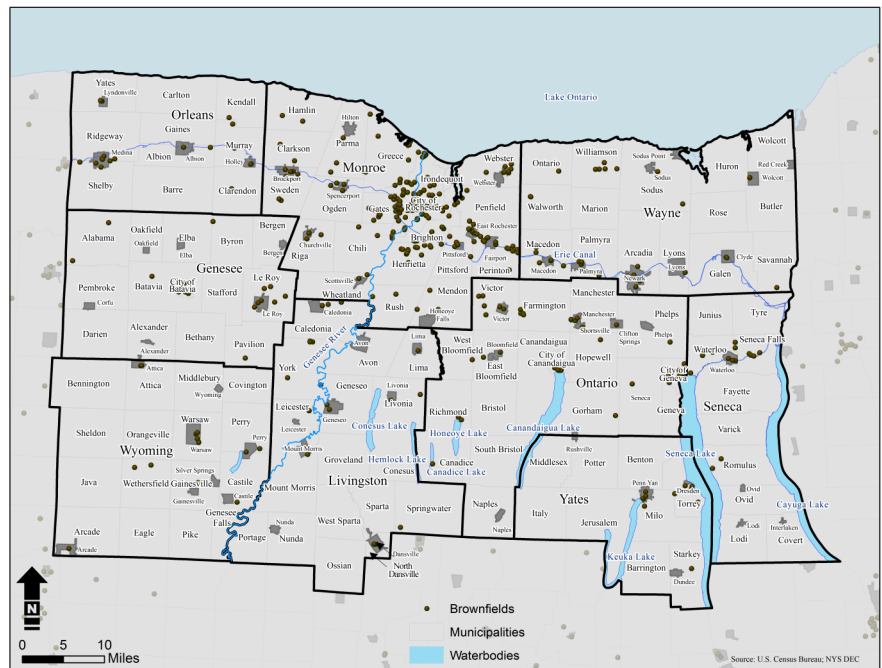
below are either currently being addressed, or have previously been addressed, under one of the New York State Department of Environmental Conservation Division of Environmental Remediation programs.

There are also likely other brownfield sites within the Genesee-Finger Lakes Region where remediation efforts have not yet begun and therefore are not included on the New York State Department of Conservation remediation site list. To help identify these sites the G/FLRPC submitted an application to the Environmental Protection Agency for a Brownfield Coalition Assessment grant on behalf of the Genesee-Finger Lakes Region. The proposed project includes inventorying and assessing brownfield properties in targeted municipalities throughout the nine-county Finger Lakes Region.

Each of the County Revitalization Opportunity reports provides additional details on the number of identified brownfield sites within each county along with details regarding several key sites.

Economic Development

Key economic development needs and goals are identified within each of the County Revitalization Opportunity reports. The County Revitalization Opportunity reports build upon existing regional economic development strategies including the Upstate Revitalization Initiative Plan titled *Finger Lakes Forward: United for Success*, the Finger Lakes Regional Economic De-

Map 6: Identified New York State DEC Brownfield

Tourism and Recreation

Map 7 illustrates the parks and recreation sites within the Genesee-Finger Lakes Region including state parks, boat launches, snow mobile trails, and recreational trails. Each County Revitalization Opportunity report also includes identification of key county tourism and recreational attraction and identifies key tourism and recreation goals, objectives, and projects.

Waterfronts

The waterfront subject area section within each County Revitalization Opportunity report includes discussion of waterfront goals, objectives, and projects along with identification and information on New York State Department of State Local Waterfront Revitalization Program projects within the Region.

Environmental/Water Resources/Natural Resources

Map 8 illustrates the waterbodies within the Genesee-Finger Lakes Region including lakes; streams; rivers, and wetlands.

Additional environmental, water resources, and natural resource information is included within the County Revitalization Opportunity reports including discussion of the goals of the Finger Lakes Regional Sustainability Plan along with county specific environmental, water resource, and natural resource priorities.

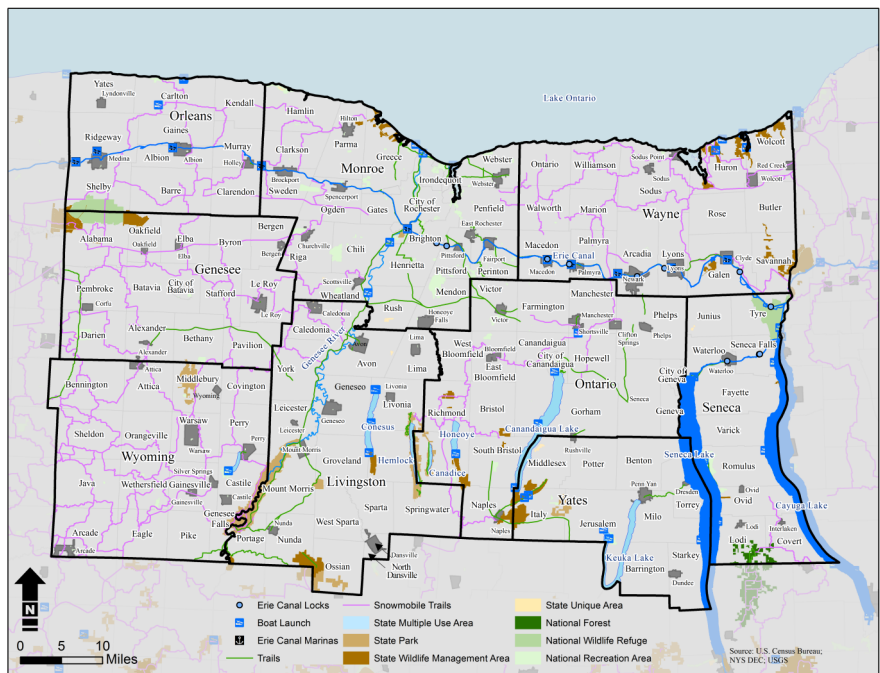
Energy

The energy subject area within each county Revitalization Opportunity report discusses the regional energy goals identified within the Finger Lakes Regional Sustainability Plan, ongoing activities of the New York State Energy Research and Development Authority, and county specific energy projects and goals.

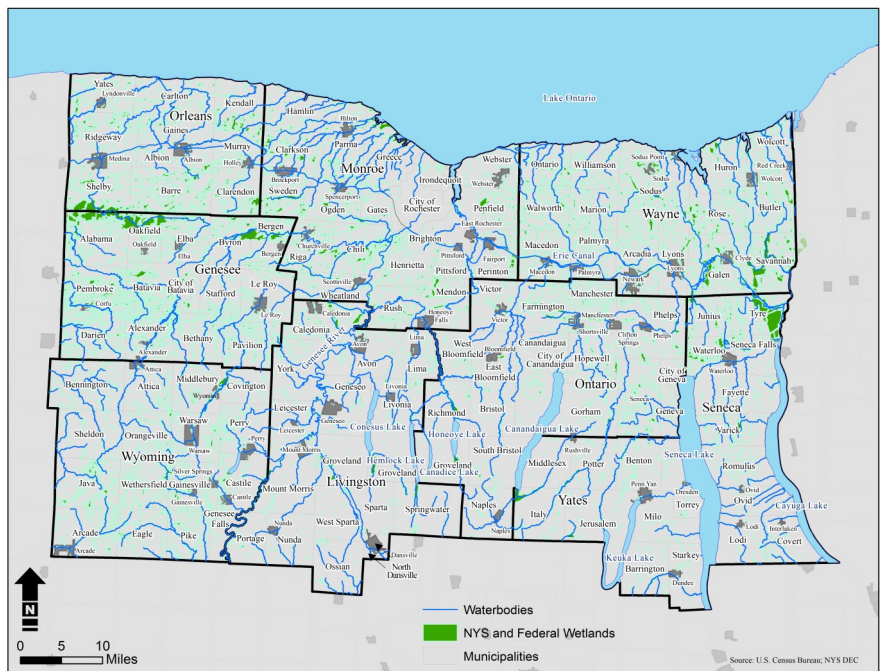
Buildings/Housing

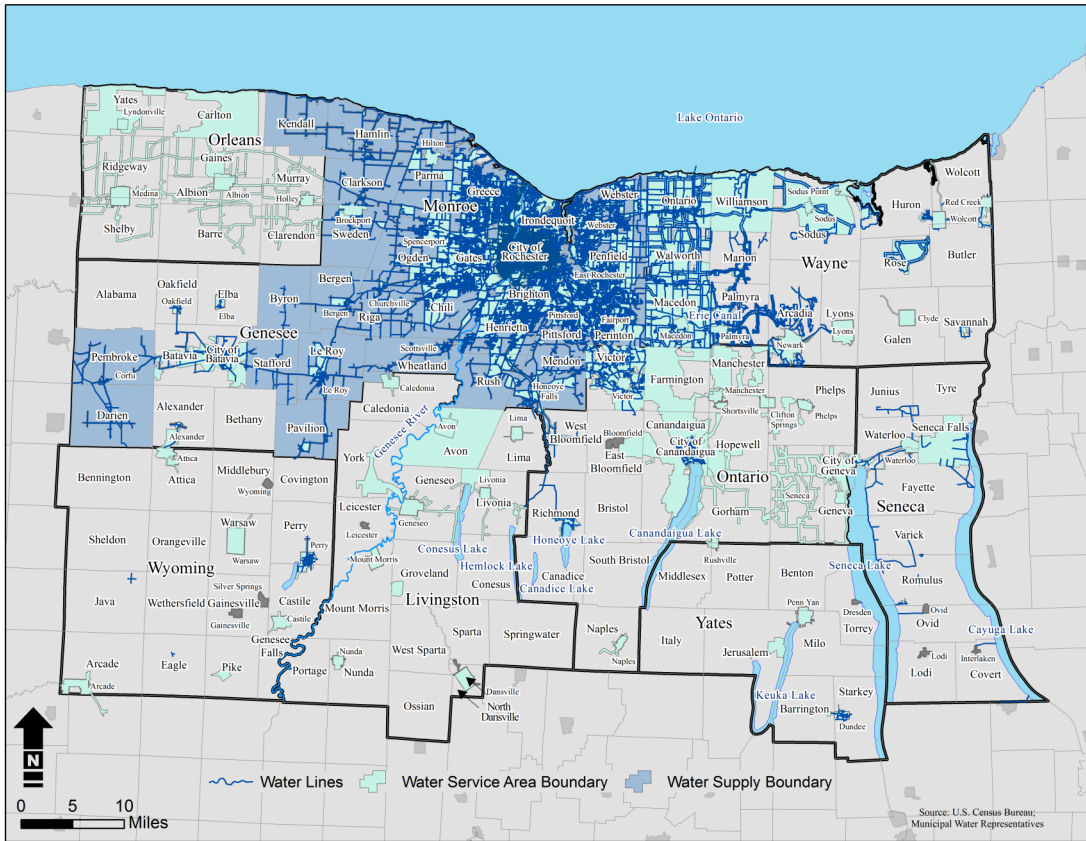
Within the buildings/housing subject area of each county Revitalization Opportunity report, county specific building/housing goals are discussed along with the many agencies and programs that are actively working to achieve these goals.

Map 7: Parks and Recreation Sites



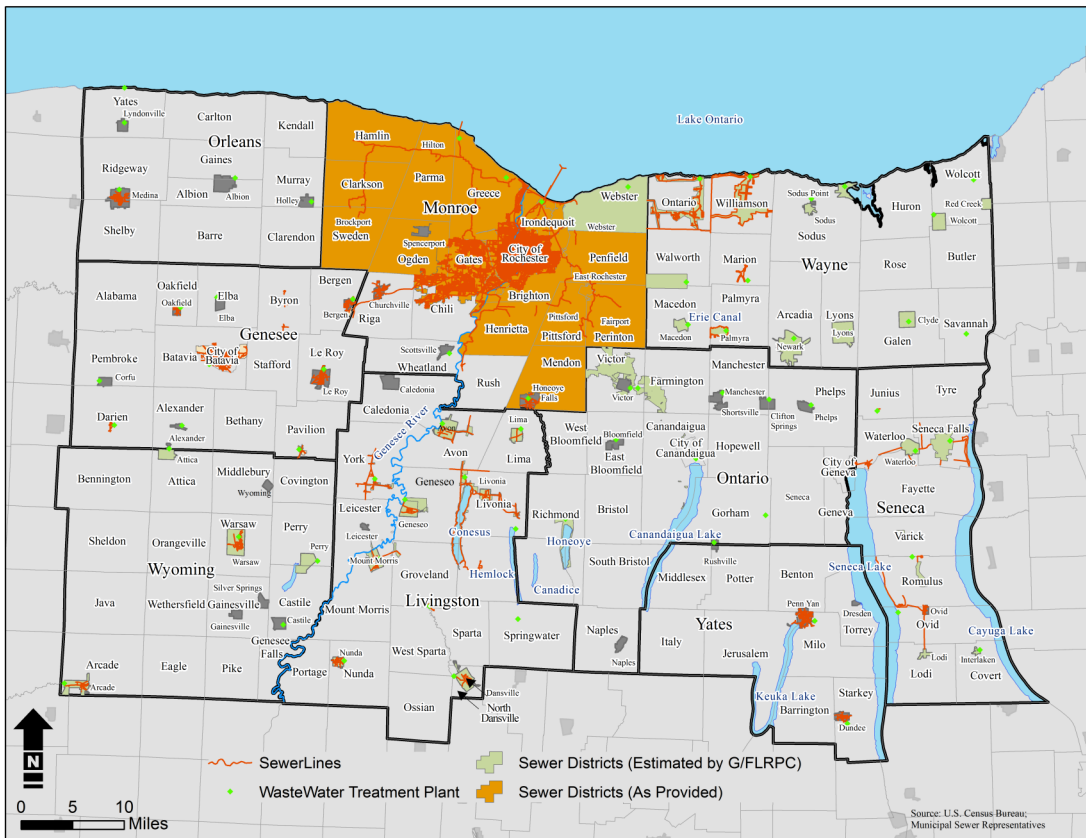
Map 8: Genesee-Finger Lakes Region Waterbodies and Wetlands

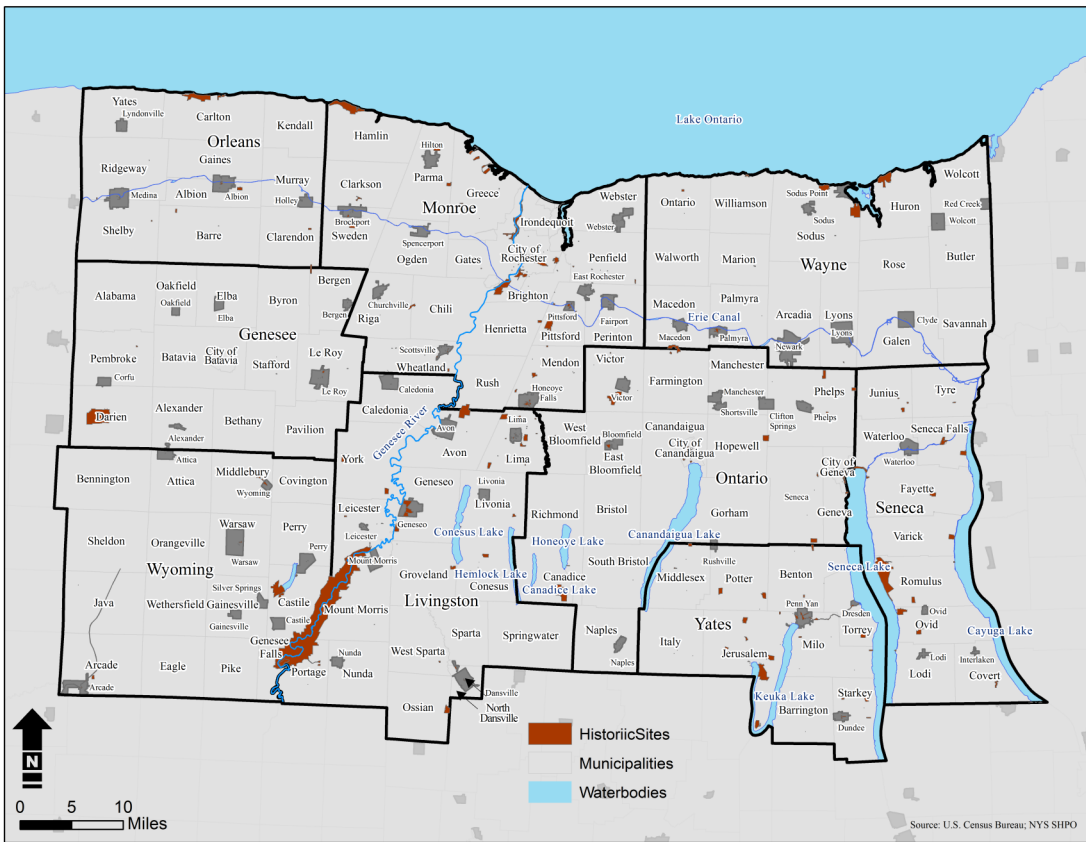


Map 9: Identified Water Infrastructure Genesee-Finger Lakes Region**Infrastructure**

Maps 9 and 10 provide an overview of known water and sewer infrastructure within the nine-county Region. The two maps provide insight into areas that are positioned for residential and commercial growth.

Within each individual county Revitalization Opportunity report the infrastructure subject area discusses key county infrastructure goals and priority projects, information on traffic counts along key corridors, and the conditions of state bridges within the county.

Map 10: Identified Wastewater Infrastructure Genesee-Finger Lakes Region

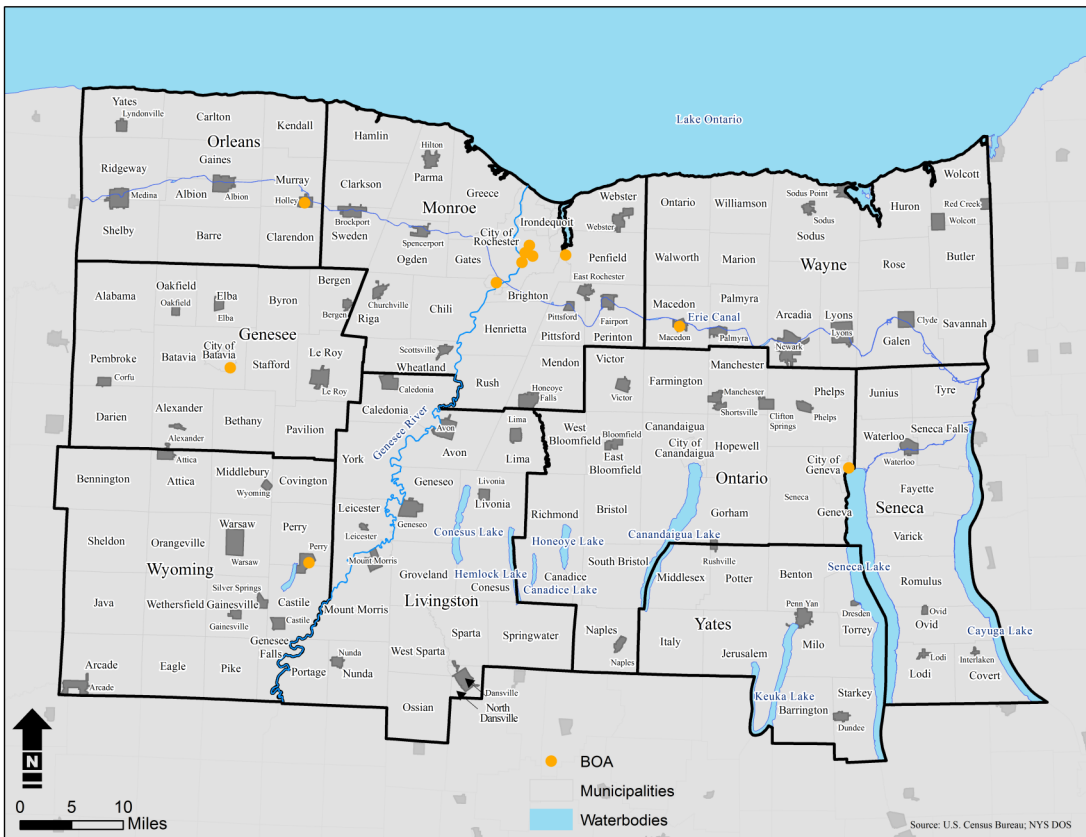
Map 11: Historic Sites

Preservation/Cultural
Map 11 illustrates the historic sites within the nine-county Genesee-Finger Lakes Region. Each of the nine County Revitalization Opportunity reports provides additional details about some of the historic sites and historic districts located within the County along with discussion of cultural significant areas located within the County and identified Regional and county specific preservation/cultural goals and projects.

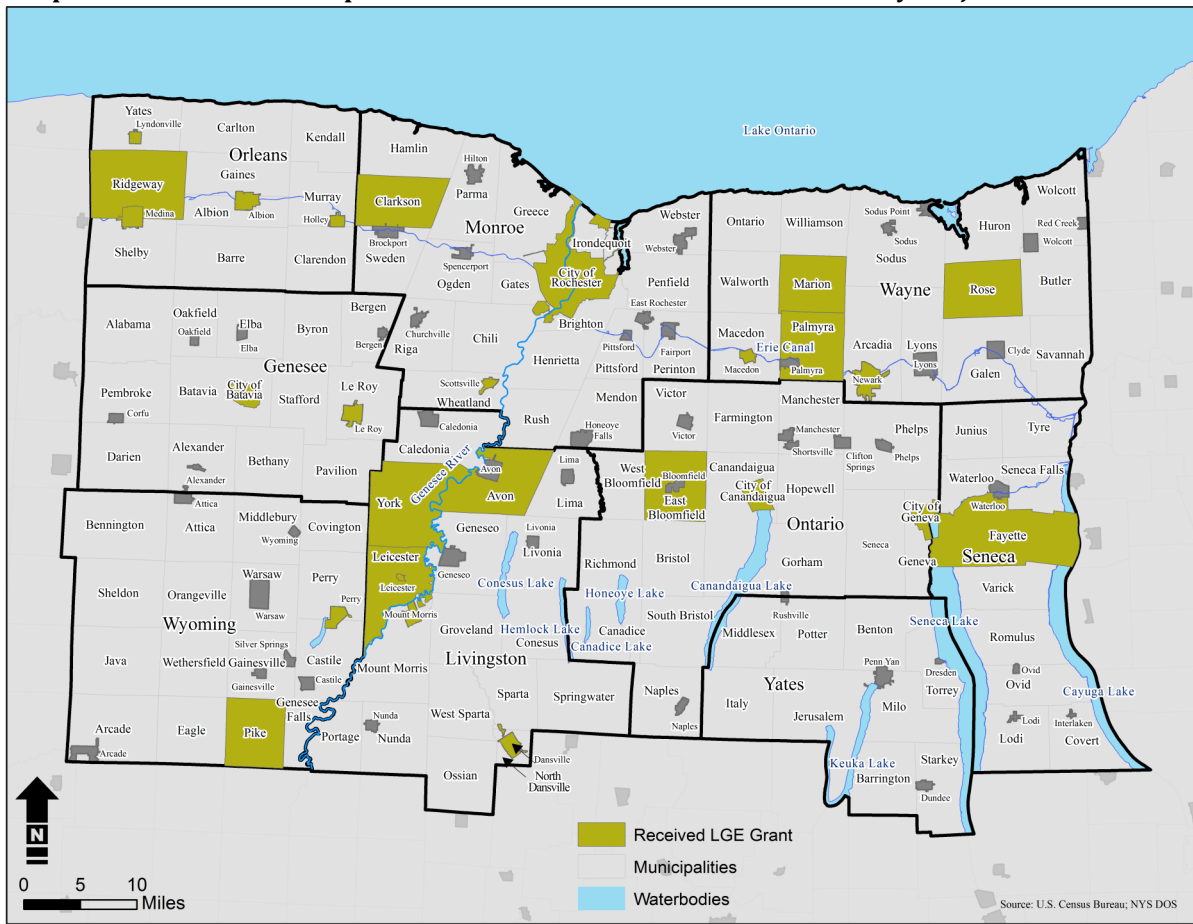
Department of State Programs

A number of projects within the Region have successfully leveraged New York State Department of State funding through programs such as the Brownfield Opportunity Area Program; the Local Government Efficiency Program; and the Local Waterfront Revitalization Program. Maps 12, 13, and 14 illustrate the municipalities and areas where many of these projects are currently engaged or where they have been successfully completed as of 2015.

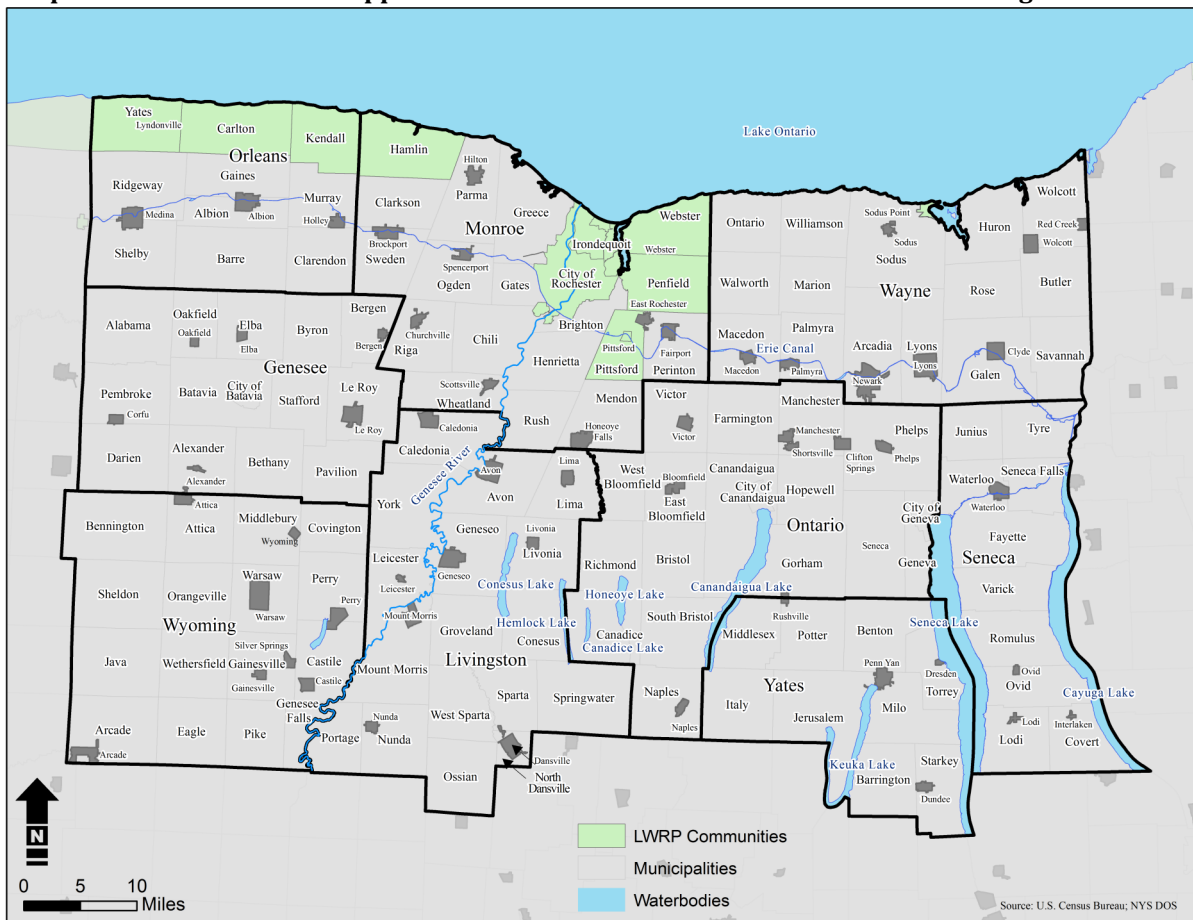
These projects and programs are discussed in greater detail within the county Revitalization Opportunity reports.

Map 12: New York State Department of State Brownfield Opportunity Area Projects

Map 13: New York State Department of State Local Government Efficiency Projects



Map 14: Communities with Approved NYS DOS Local Waterfront Revitalization Programs



Regional Step-2 Recommendations

A number of region-wide key project recommendations were identified through regional engagement stakeholder feedback and through existing regional strategies including the Finger Lakes Regional Economic Development Council Strategic Plan, entitled “Accelerating our Transformation” and the Upstate Revitalization Initiative, entitled “Finger Lakes Forward: United for Success”. These regional strategies along with the input gathered at the Sub-Regional Forums; follow-up webinars; and County Forums identified several focus areas and associated projects covering the nine-county Genesee-Finger Lakes Region.

Identified regional priority projects include: completion of a brownfield inventory and assessment; completion of an infrastructure inventory and assessment; advancement of a comprehensive regional food system assessment; and improving internet/broadband through last mile connections.

Completion of a brownfield inventory and assessment was identified as a regional priority since there are a number of brownfield properties in the Region that are limiting economic development and community development efforts. A number of counties are also unaware of the full number of brownfield properties impacting their communities. The completion of the brownfield inventory and assessment will allow for development of a brownfield database; prioritize brownfield redevelopment efforts; and identify specific steps towards addressing brownfield properties within the Region.

Completion of an infrastructure inventory and assessment was identified as a regional priority project through discussions with stakeholders. Many counties, especially rural counties, do not have detailed information on the locations or capacities of water, wastewater, broadband, or utility/energy infrastructure. Without this information the ease of business expansion and attraction is reduced and development decisions are made difficult. Completion of the infrastructure inventory and assessment will allow for counties to identify and prioritize infrastructure projects and better position the region for development.

The comprehensive regional food system assessment will focus on advancing the recently completed *Transportation and Food Systems in the Genesee-Finger Lakes Region* report, which identified and interviewed local/regional stakeholders in a number of areas of agriculture and food production to inform future efforts and establish improved connections between food producers and consumers, with an emphasis on increasing the regional economic impact of the region-

al food system.

Stakeholders throughout the regional engagement project also expressed the need for improving internet/broadband through last mile connections. Many areas of the region remain unserved or underserved by broadband despite close by areas that have access. Successful completion of “last mile” connections will provide these underserved and unserved neighborhoods with access to internet/broadband that is essential for businesses and the quality of life of residents.

Additionally, implementing the goals of the Upstate Revitalization Initiative remains a key priority for the Region, these goals include: advancing the industry clusters of optics, photonics, and imaging; agriculture and food production; and next generation manufacturing and technology; along with improving the foundation of the regional economy through investments in workforce development; entrepreneurship and development; and higher education and research.

Successful implementation of the identified regional priority projects will help to accelerate job creation and strengthen the quality of life of the Region, both of which are crucial goals of the Finger Lakes Regional Economic Development Council Strategic Plan entitled “Accelerating our Transformation.”

The Step-2 Nomination Study will emphasize the economic distress areas identified within each County with a focus on the brownfield properties/neighborhoods within those communities. Details about the County specific recommendations and identified county economic distress areas are outlined within each Revitalization Opportunity reports.

Finger Lakes Region Next Steps/Status

G/FLRPC submitted an application for an EPA Brownfield Coalition Assessment Grant that would provide funding for the completion of a brownfield inventory and assessment for the Region. The Coalition included each of the nine-counties of the Finger Lakes Region.

Discussions regarding the development of an infrastructure inventory and assessment took place at the February 2016 Genesee/Finger Lakes Regional Planning Council Economic Development Advisory Committee meeting with G/FLRPC looking to identify and pursue funding for completion of the project. Funding may be available through the Economic Development Administration Economic Adjustment Assistance program to cover up to 50% of the project with discussions ongoing within the Region to identify availability of other funding resources.

Several counties within the Region have been leading the push towards expanding broadband into unserved and underserved areas of the county. New York State recently announced the availability of funding through the New NY State Broadband Program which aims to provide funding through public-private partnerships to help provide and expand broadband access in high priority areas of the state. Broadband discussions have also occurred through the Finger Lakes Regional Economic Development Council Infrastructure & Transportation workgroup, which formed a Telecommunications sub-committee to help lead implementation efforts.

Implementation efforts for the Upstate Revitalization Initiative and Finger Lakes Regional Economic Development Council Strategic Plan will continue with stakeholder input from a variety of workgroup teams. These teams will include the Pillar Teams of: Optics, Photonics, and Imaging; Agriculture and Food Production; and Next-Gen Manufacturing & Tech; Enabler Teams of: Pathways to Prosperity; Entrepreneurship & Development; and Higher Education & Research; and Foundation Teams of: Tourism & Arts; Sustainability; Infrastructure & Transportation; and Global NY. The input and outreach of each of these teams and the Finger Lakes Regional Economic Council will help to identify projects that align with the Upstate Revitalization Initiative Plan and the Finger Lakes Regional Economic Development Council strategic plan.

Goals and Objectives

Goals and objectives were not developed for the Region with the focus instead placed on the development of specific goals and objectives tailored to each individual county. These county specific goals and objectives were identified through the Sub-Regional Forums; follow-up webinars; County Forums; and existing local, county, and regional plans. The county goals and objectives can be found within each county Revitalization Opportunity report.

Projects

Projects listed below were identified through the Sub-Regional Forums; follow-up webinars; County Forums; and existing local, county, and regional plans; and the regional engagement project capture form. Projects are listed with a brief description, along with their corresponding subject area or areas, and potential funding sources. Additional information about potential funding sources is available in Appendix B.

Genesee-Finger Lakes Region Priority Projects

| Project Name | Project Description | Subject Area | Agency/Organization Responsible for Implementation | Potential Funding Organization/Program |
|---|---|--------------------------------|--|--|
| Brownfield Inventory and Assessment | Detailed inventory of brownfield sites within the Region, including mapping and assessment of key sites. Project would position sites for remediation opportunities. | Brownfields | County planning departments; G/FLRPC; local municipalities | Environmental Protection Agency Brownfield Assessment Grant; DOS Brownfield Opportunity Area |
| Infrastructure Inventory and Assessment | Detailed inventory of existing infrastructure within the Region including water, wastewater, transportation, broadband, and utility/energy. Project would identify infrastructure needs in key areas and better position the Region to make infrastructure funding decisions. | Infrastructure | County planning departments; county industrial development agencies; G/FLRPC; local municipalities | Empire State Development Grant Funds; Economic Development Administration Economic Adjustment Assistance Program; Upstate Revitalization Initiative. |
| Internet/Broadband “Last Mile” | Project would improve internet/broadband connections to areas that are unserved or underserved by broadband. | Infrastructure | County planning departments; New York State | New NY State Broadband Program |
| Regional Food Systems | A comprehensive assessment of the regional food system to advance the <i>Transportation and Food Systems in the Genesee-Finger Lakes</i> Report and expand the economic impact of the regional food system. | Land Use, Economic Development | G/FLRPC, County planning department; county industrial development agencies | Upstate Revitalization Initiative |

End Notes

1. <http://www.empire.state.ny.us/RegionalOverviews/FingerLakes/InsideRegion.html>
2. 2000 and 2010 U.S. Census www.census.gov
3. 2000 and 2010 U.S. Census www.census.gov
4. QCEW also excludes self-employed workers, members of the Armed Forces, elected officials in most states, most employees of railroads, some domestic workers, most student workers at schools, and employees of certain small nonprofit organizations.
5. 2012 Quarterly Census Employment and Wages www.labor.ny.gov
6. <http://www.rochesterbiz.com/Portals/0/PortalFiles/Documents/PrivateSectorEmployers2013.pdf>
7. November 2015. New York State Department of Labor www.labor.ny.gov
8. U.S. Bureau of Labor Statistics www.bls.gov
9. 2012 U.S. Census ACS 5-year estimates www.census.gov
10. 2012 U.S. Census ACS 5-year estimates www.census.gov
11. 2012 U.S. Census ACS 5-year estimates www.census.gov
12. 2012 U.S. Census ACS 5-year estimates www.census.gov
13. 2012 U.S. Census ACS 5-year estimates www.census.gov
14. 2012 U.S. Census ACS 5-year estimates www.census.gov
15. Genesee/Finger Lakes Regional Planning Council Economic Distress Index