



Southern Tier West Regional Planning & Development Board
4039 Route 219, Suite 200, Salamanca NY 14779

2022 Southern Tier West Region

Comprehensive Economic Development Strategy

2022 Comprehensive Economic Development Strategy

Prepared for Allegany, Cattaraugus, and Chautauqua Counties of New York State

By The

Southern Tier West Regional Planning and Development Board



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Introduction

Southern Tier West Regional Planning and Development Board ("**Southern Tier West**") annually prepares a Comprehensive Economic Development Strategy ("**CEDS**") document in satisfaction of contractual obligations to the U.S. Department of Commerce Economic Development Administration ("**EDA**"). From the federal government's perspective, the CEDS is the official economic development strategic plan for the Southern Tier West region (Allegany, Cattaraugus, and Chautauqua Counties) of New York State.

EDA has specific requirements for the CEDS planning process, document format, and document content. The 2022 CEDS is an update of the 2021 CEDS, reflecting newly available data, current economic development strategies, and current economic development projects and initiatives. The 2022 CEDS has been re-formatted, moving the strategic content of the CEDS forward in the document and relegating other EDA-required content to the Appendix, all the while retaining all of the updated strategic and other content of the 2021 CEDS. The 2022 CEDS also has been reconceptualized as a more user-friendly document, in comparison with the 2021 CEDS, which was more of a comprehensive reference document. The 2022 CEDS was prepared through a planning process per EDA CEDS requirements, and the 2022 CEDS conforms to EDA's requirements regarding content.

The purpose of the implementation of the CEDS is to create an economic environment that fosters job creation, a more diversified economy, and improves the quality of life for the residents of the three county Southern Tier West region. The CEDS outlines appropriate strategies and projects for implementation by local governments, private industry, organizations, and individuals concerned with economic development.

Economic development project sponsors seeking funding from **EDA** for their projects must have their projects designated as priority projects by the Southern Tier West Board, and have those projects included in the CEDS.

Economic development project sponsors seeking funding from the Appalachian Regional Commission ("**ARC**") for their projects must have their projects designated as priority projects by the Southern Tier West Board. Priority ARC projects are included in the CEDS. In their applications to ARC for funding, sponsors should include references to CEDS strategies supporting their project.

Executive Summary

The Southern Tier West region historically has experienced economic distress that very often has exceeded that of either the State or the nation as a whole. This can be seen by examining regional unemployment rates, regional per capita income levels, regional poverty levels, decreasing regional population, and businesses and resident outmigration.

Similar to the nation, the Southern Tier West's economy continues to recover from the pandemic-induced economic downturn. Although both the nation and the region have experienced an economic revival of sorts, our region nonetheless continues to be more economically depressed than the State and the nation as a whole. Our region struggles to



remain economically competitive with other regions and the global economy, and struggles to maintain and grow value added, high paying jobs.

In the future, our region’s economic health and quality of life will be dependent upon its ability to improve on its economic competitiveness, a goal whose achievement is made more difficult because of the dynamic restructuring of and challenges facing the regional, national, and global economies. Similar to the nation as a whole, our region is experiencing a long-term transformation from a commodity-based manufacturing-based economy into a technology-based and service-based economy. Developing foreign economies, domestic relative comparative disadvantages, and the restructuring of the global financial, product, and services markets all present challenges to domestic regional economies such as ours.

To maintain and improve our region’s standard of living, we must transform our regional economy into a regional-net-export-surplus, knowledge-based, innovation-based economy that is more internally self-sufficient, i.e., that is less dependent upon the extra-regional economy. It is essential for our region to maintain and cultivate the value-added regional-net-export-surplus sectors of the regional economy – be they manufacturing, service, or agricultural – in industry clusters and occupation clusters in which our region enjoys a competitive or niche advantage, in which there is opportunity and capacity for innovation, and in which there is significant growth potential.

The CEDS is an asset-based economic development strategy that builds on existing regional resources (“assets”), broadly defined, to strengthen the regional economy.

This CEDS sets forth the following **Vision** for the future of the Southern Tier West region:

The Southern Tier West region will become a region whose economy is globally competitive, is dynamic and growing, and provides meaningful and sustaining employment for its residents. The Southern Tier West region will transform its regional economy into a regional-net-export-surplus, knowledge-based, innovation-based economy that is more internally self-sufficient, i.e., that is less dependent upon the extra-regional economy. The Southern Tier West region will maintain and cultivate the value-added regional-net-export-surplus sectors of the regional economy – be they manufacturing, service, or agricultural – in industry clusters and occupation clusters in which our region enjoys a competitive or niche advantage, in which there is opportunity and capacity for innovation, and in which there is significant growth potential.

To achieve this Vision, the region should attempt to achieve the following **five economic development goals**:

- 1. Human Capital** – to develop a skilled labor force capable of creating a knowledge-based and innovation-based economy, and that encourages businesses to start, locate, and expand in the region
- 2. Traditional and Non-Traditional Infrastructure** – to maintain and improve the region’s built environment and services that are requisite for retaining and expanding existing businesses and attracting new businesses



3. **Innovation and Entrepreneurship** – to catalyze innovation and new business development and growth, especially as regards technology-based, value added, and net export businesses
4. **Quality, Connected Places** – to create quality, connected, safe, convenient and healthy places to live and work, that make the region attractive as a place to live, work and do business
5. **Collaborative Leadership** – to encourage coordinated governance and rational and coordinated systemic investment in targeted economic development initiatives

The strategic recommendations (i.e., strategies, projects, programs, and other activities) contained in this CEDS are consistent with and designed to achieve these five stated goals. The CEDS also lists the following **strategic foci** for regional economic development activities:

1. Target economic development activities and initiatives toward significant regional **industry clusters** and **occupation clusters** that are value-added and net export clusters
2. Promote and catalyze **entrepreneurship**
3. Increase the quantity and quality of **human capital** through education and job training, to develop a highly skilled, tech-savvy regional labor force
4. Augment our region’s educational services to encourage improved **STEAM skills** (Science, Technology, Engineering, Arts, and Mathematics skills) and **entrepreneurial skills**
5. Maintain and improve **transportation infrastructure**, consistent with smart growth principles
6. Maintain and improve **utility infrastructure**, including **broadband and energy infrastructure**, consistent with smart growth principles and with green infrastructure principles
7. Develop, improve, and expand **industrial sites, acreage, parks, and buildings** (“shovel readiness”), consistent with smart growth principles
8. **Improve communities** through initiatives including **downtown revitalization and building renovation / redevelopment; development of more sustainable neighborhoods and walkable communities; brownfield remediation and redevelopment; protection and restoration of water resources, waterfronts, open spaces, and habitats; enhancement of public access to waterfront areas; and enhancement of recreational / tourism assets**
9. Incentivize and catalyze **innovation, technology transfer, and adoption of new technologies**
10. Provide adequate and innovative **development finance resources and technical assistance** as needed to catalyze and incentivize (new and existing) private sector business development
11. Assist in the **retention and expansion of existing regional businesses**
12. **Attract new businesses** to the region



13. *Maintain and improve the **region’s cornerstone and community-based and civic institutions and quality of life assets, capacities, and services** to improve area quality of life*
14. *Encourage, at the community, county, and regional levels, **comprehensive and strategic economic development planning**; and develop and implement **community and economic development projects** consistent with those plans and with **smart growth principles and sound environment principles***
15. *Improve **quality of life assets** that impact economic development*
16. *Improve **collaborative leadership**, including increased **strategic comprehensive planning and economic development planning and project implementation**; enhanced levels of **partnership and collaboration**; increased investment in **business development / business assistance capacity, entrepreneurial development, and innovation**; and **innovation with respect to government operating practices***
17. ***Capture the potential of the Seneca Nation of Indians as a driver of economic development***
18. ***Improve economic resilience** in response to natural disasters and other (non-natural) disasters*

By incorporating these analytical techniques relating to innovation and clusters, and by incorporating the Vision of moving toward a more regional-net-export-surplus, knowledge-based, innovation-based economy, Southern Tier West is using this CEDS to attempt to transform the paradigm of economic development within our region from a philosophy that often is “deal-driven” or “specific-opportunity-driven” – sometimes even reactive – to a philosophy that clearly also embraces and encourages – as a primary strategy – a reinvigorated emphasis on proactive initiatives related to economic inputs, knowledge, and innovation.

It is Southern Tier West’s hope that in the months and years to come, this refocusing of strategic emphasis onto developing a more regional-net-export-surplus, knowledge-based, innovation-based economy will lead to a broader portfolio of strategic economic development initiatives (i.e., projects and programs) designed to build on regional strengths and enhance regional competitiveness. This paradigm shift will require forward thinking and a willingness to invest in the future by building capacity and enhancing regional assets. The goals of such a paradigm shift are as follows:

- The conceptualization and implementation of higher-impact economic development projects and programs.
- Achieving an improved consensus approach to selecting the highest impact projects and investing resources in their implementation.
- Increased success in our shared regional economic development mission, which will be reflected in an increased economic growth and an improvement in economic indicators.



Strategic Framework

This following is the **Vision** for the future of the Southern Tier West region and its economy:

The Southern Tier West region will become a region whose economy is globally competitive, is dynamic and growing, and provides meaningful and sustaining employment for its residents. The Southern Tier West region will transform its regional economy into a regional-net-export-surplus, knowledge-based, innovation-based economy that is more internally self-sufficient, i.e., that is less dependent upon the extra-regional economy. The Southern Tier West region will maintain and cultivate the value-added regional-net-export-surplus sectors of the regional economy – be they manufacturing, service, or agricultural – in industry clusters and occupation clusters in which our region enjoys a competitive or niche advantage, in which there is opportunity and capacity for innovation, and in which there is significant growth potential.

To achieve this Vision, the region should attempt to achieve the following **five economic development goals**:

1. **Human Capital** – to develop a skilled labor force capable of creating a knowledge-based and innovation-based economy, and that encourages businesses to start, locate, and expand in the region
2. **Traditional and Non-Traditional Infrastructure** – to maintain and improve the region’s built environment and services that are requisite for retaining and expanding existing businesses and attracting new businesses
3. **Innovation and Entrepreneurship** – to catalyze innovation and new business development and growth, especially as regards technology-based, value added, and net export businesses
4. **Quality, Connected Places** – to create quality, connected, safe, convenient and healthy places to live and work, that make the region attractive as a place to live, work and do business
5. **Collaborative Leadership** – to encourage coordinated governance and rational and coordinated systemic investment in targeted economic development initiatives

The strategic recommendations (i.e., objective, priority strategic foci, projects, programs, and other activities) contained in this CEDS are consistent with and designed to achieve these five stated goals.

Objectives are more specific than goals, clearly measurable, and provide milestone parameters against which the region’s progress in attaining its economic goals can be evaluated. The following are the region’s **fifteen economic development objectives**:

1. Achieve per capita income levels exceeding state and national levels.
2. Achieve poverty rate levels less than state and national levels.



3. Achieve and sustain income transfer payment rates that are less than state and national levels.
4. Achieve unemployment rates less than state and national levels.
5. Reduce the level of underemployment and part time employment to levels that are less than state and national levels.
6. Reduce population outmigration to levels less than state levels and stabilize and augment regional population levels.
7. Increase the percentage of the region's population that is represented by the 18-to-64 age demographic to levels exceeding state and national levels.
8. Achieve and sustain secondary and post-secondary (associates, bachelors, and graduate) education levels in excess of state and national levels.
9. Increase the average high-tech employment share to levels equal to or exceeding state and national averages.
10. Increase the technology-based knowledge occupations as a share of total employment to levels equal to or exceeding state and national averages.
11. Increase the utilization of venture capital investment in the region to state levels.
12. Increase broadband density and penetration levels to levels equal to or exceeding state and national averages.
13. Increase establishment churn rates to a level that exceeds state and national rates as a means to diversification as insurance against closures and dislocations of large employers.
14. Increase gross domestic product (GDP) per worker in the region to levels equal to or exceeding state and national averages.
15. Avoid disruptions (plant closures, plant downsizings, production hiatuses, etc.) and reduce severity and duration of disruptions post-incident.

The CEDS SWOT Analysis suggests the certain strategic regional economic development foci. The following are the region's **priority strategic foci** in each of the above five economic development goal areas:

1. *Target economic development activities and initiatives toward significant regional **industry clusters** and **occupation clusters** that are value-added and net export clusters*
2. *Promote and catalyze **entrepreneurship***
3. *Increase the quantity and quality of **human capital** through education and job training, to develop a highly skilled, tech-savvy regional labor force*
4. *Augment our region's educational services to encourage improved **STEAM skills** (Science, Technology, Engineering, Arts, and Mathematics skills) and **entrepreneurial skills***



5. Maintain and improve **transportation infrastructure**, consistent with smart growth principles
6. Maintain and improve **utility infrastructure**, including **broadband and energy infrastructure**, consistent with smart growth principles and with green infrastructure principles
7. Develop, improve, and expand **industrial sites, acreage, parks, and buildings** (“shovel readiness”), consistent with smart growth principles
8. **Improve communities** through initiatives including **downtown revitalization and building renovation / redevelopment; development of more sustainable neighborhoods and walkable communities; brownfield remediation and redevelopment; protection and restoration of water resources, waterfronts, open spaces, and habitats; enhancement of public access to waterfront areas; and enhancement of recreational / tourism assets**
9. Incentivize and catalyze **innovation, technology transfer, and adoption of new technologies**
10. Provide adequate and innovative **development finance resources and technical assistance** as needed to catalyze and incentivize (new and existing) private sector business development
11. Assist in the **retention and expansion of existing regional businesses**
12. **Attract new businesses** to the region
13. Maintain and improve the **region’s cornerstone and community-based and civic institutions and quality of life assets, capacities, and services** to improve area quality of life
14. Encourage, at the community, county, and regional levels, **comprehensive and strategic economic development planning**; and develop and implement **community and economic development projects** consistent with those plans and with **smart growth principles and sound environment principles**
15. Improve **quality of life assets** that impact economic development
16. Improve **collaborative leadership**, including increased **strategic comprehensive planning and economic development planning and project implementation**; enhanced levels of **partnership and collaboration**; increased investment in **business development / business assistance capacity, entrepreneurial development, and innovation**; and **innovation with respect to government operating practices**
17. **Capture the potential of the Seneca Nation of Indians as a driver of economic development**
18. **Improve economic resilience** in response to natural disasters and other (non-natural) disasters



Strategies are more specific types of activities and initiatives that the region endorses as a means to achieve the objectives identified above, so as to attain its economic goals. This CEDS sets forth the following **thirty-two primary economic development strategies**, categorized under the five primary regional economic development goal areas presented above. Each group of strategies is prefaced by a restatement of the specific goal.

Goal #1: Human Capital – *to develop a skilled labor force capable of creating a knowledge-based and innovation-based economy, and that encourages businesses to start, locate, and expand in the region*

1. Retain and stabilize the regional population to provide a sufficient population base to ensure the continuing viability of regional institutions and communities, and to provide sufficient labor force to ensure that the region’s economy can grow and develop. By and large, this is a function of economic opportunity, infrastructure (broadband, utility, and transportation improvements), business climate, cost of living, and quality of life.
2. Improve regional population demographics, i.e., attract a skilled, younger demographic population, to stabilize and grow the region’s population and labor force, and to reduce the impact of the region’s dependent population demographic.
3. Improve regional educational attainment through enhancing our region’s educational system and services; increasing the percentage of the population acquiring advanced educational degrees at the associate, bachelors, masters and doctoral levels; encouraging the region’s best and brightest to stay in the region to pursue their careers and lives; encouraging enhanced STEAM (Science, Technology, Engineering, Arts, and Mathematics) education, leadership, technology-based education, and entrepreneurial education at the primary, secondary, post-secondary, and adult education levels; and encouraging enhanced career development planning early on during education to help guide the younger demographic into careers with futures.
4. Increase the quantity and quality of human capital through education, workforce training, job training, internships, and other mechanisms so as to develop a highly skilled, tech-savvy regional labor force that meets current and future employer needs
5. Focus on building and capitalizing on regionally significant occupational clusters as a development asset.

Goal #2: Traditional and Non-Traditional Infrastructure – *to maintain and improve the region’s built environment and services that are requisite for retaining and expanding existing businesses and attracting new businesses*

6. Maintain and improve transportation infrastructure, consistent with smart growth principles and sustainability principles, and utilize the region’s transportation infrastructure as a driver of economic development
7. Maintain and improve utility infrastructure, including water and wastewater service, natural gas and electricity service, and broadband and alternative energy infrastructure;



whenever possible, such investments should be consistent with smart growth principles, sustainability principles, and green infrastructure principles

8. Improve the region's "shovel readiness" through activities including site development / industrial park and acreage expansion / infrastructure expansion / permitting / development along rail and highway corridors and broadband backbone corridor / interstate interchange development / spec building development / building redevelopment, all consistent with smart growth principles
9. Develop, improve, and expand non-physical or non-traditional infrastructure, including specialized space, dedicated equipment, information and communication technologies, business networks, linkages to the education/research/labor force training system, and logistics; and also including the development of physical facilities geared toward technology-based businesses, including specialized shared-use physical facilities, especially as regards technology development (i.e., prototype development, shared testing and manufacturing equipment, test beds, etc.), shortage of diverse and affordable physical space with specialized amenities (e.g., broadband, shared conference space, shared operating and office equipment, etc.)
10. Improve communities through initiatives including downtown and neighborhood revitalization and redevelopment; building renovation / adaptive redevelopment / re-purposing and reuse; encouragement of improved sustainability of communities and neighborhoods, complete streets, and walkable communities; brownfield remediation and redevelopment; protection and restoration of water resources, waterfronts, open spaces, and habitats; enhancement of public access to waterfront areas; increasing and improvement of housing stock and building stock; creation and improvement of creative districts and neighborhoods; improvement of wayfinding; and enhancement of recreational / tourism assets (including public parks space, green space, trails, etc.)

Goal #3: Innovation and Entrepreneurship – to catalyze innovation and new business development and growth, especially as regards technology-based, value added, and net export businesses

11. Target economic development activities and initiatives toward significant regional industry clusters and occupation clusters that are value-added and net export clusters
12. Promote and catalyze entrepreneurship
13. Incentivize and catalyze enhanced business productivity, innovation, technology transfer, technology adoption and commercialization, and collaboration/partnerships between the university, business, and economic development communities
14. Provide adequate and innovative business development finance resources, technical assistance, and outreach as needed to catalyze and incentivize new private sector business development and assist in the retention and expansion of existing regional businesses
15. Assist in the retention and expansion of existing regional businesses



16. Attract new businesses to the region

Goal #4: Quality, Connected Places – *to create quality, connected, safe, convenient and healthy places to live and work, that make the region attractive as a place to live, work and do business*

17. Maintain and improve the region’s cornerstone and community-based and civic institutions and quality of life assets, capacities, and services to improve area quality of life and positively impact economic development
18. Develop, maintain, and promote a range of housing choices and opportunities for all residents; efficient public transportation systems; safe pedestrian networks; access to quality health care and educational facilities; and other quality of life amenities
19. Utilize smart growth principles to ensure cost effective growth and development while minimizing sprawl
20. Promote the region’s diversity
21. Enhance and promote the region’s cultural, arts, history, and tourism assets, destinations, organizations, and services
22. Develop, maintain, and promote integrated connections between communities both across the region and external to the region
23. Promote and protect the region’s natural resources in a sustainable manner
24. Streamline and reform permitting, development review, and other regulatory processes to provide a predictable legal and regulatory environment for businesses
25. Ensure regional and local agencies provide collaborative, seamless, consistent, and timely customer service to business
26. Develop a business-friendly regulatory and tax system and business assistance/incentive programs
27. Enhance regional marketing capacity and activities

Goal #5: Collaborative Leadership – *to encourage coordinated governance and rational and coordinated systemic investment in targeted economic development initiatives*

28. Encourage, at the community, county, and regional levels, comprehensive and strategic economic development planning; develop and implement community and economic development projects consistent with those plans and with smart growth principles and sound environment principles; and create capital funds to implement projects
29. Improve coordination and collaboration between and among all levels of government as well as the private sector, including enhancing public-private partnerships, and make strategic investments that are aligned with and further regional priorities
30. Improve leadership training and enhance public involvement in coordinating decision-making and investments at the regional level
31. Seneca Nation of Indians initiatives



32. Improve economic resilience through appropriate steady-state actions (avoidance, prevention, and mitigation of economic disruptions) and response actions (response to economic disruptions)

Examples of potential initiatives (i.e., projects and programs) for each of the above 32 strategies may be found in the Appendix chapter entitled “Potential Strategic Initiatives.” Actual planned prospective projects (“priority projects”) are identified in the next chapter, “Action Plan,” where they are listed under the specific goal to which they are tied.



Action Plan

The following are priority economic development projects categorized by the five regional economic development goals. (Each goal also is followed by a list of strategies to accomplish the individual goal.) The projects are grouped by their county of implementation, and regional projects impacting more than one county also are listed. (For examples of potential projects that could be developed for each of the strategies under each goal, please refer to the Appendix section entitled “Potential Strategic Initiatives.” For additional listing of EDA priority Projects, ARC priority projects, and all projects by county, please refer to the next chapter, the “Project Lists” chapter, and specifically the EDA Project List, ARC Project List, and Comprehensive Project List sections of that chapter.) The priority projects in the Action Plan include priority EDA projects and ARC projects as designated by the Southern Tier West Board in July 2022.

Goal #1: Human Capital – to improve the skill levels of the regional labor force

Strategies to accomplish this goal include:

- Retain and stabilize the regional population.
- Improve regional population demographics.
- Improve regional educational attainment.
- Increase the quantity and quality of human capital through education, workforce training, job training, internships, and other mechanisms.
- Focus on building and capitalizing on regionally significant occupational clusters as a development asset.

Priority Projects:

Allegany County

Heavy Equipment Operations Program: Virtual Simulation Laboratory

Sponsor: Alfred State College of Technology
 Total Cost: \$285,714; funding sources: ARC, \$200,000, local cash, \$55,679, local in-kind \$30,035
 Job Impact: TBD; 80 students trained, and 15 workers trained
 Date: 2023

Building the Future Forward

Sponsor: Belfast Central School District
 Total Cost: \$356,136; funding sources: ARC, \$243,103, local in-kind, \$113,033
 Job Impact: TBD, 3 part time jobs to support instruction, 20 students trained
 Date: 2023



Cattaraugus County

CDL-A

Sponsor: CA-BOCES
Total Cost: \$378,624; funding sources: ARC, \$189,000, local in-kind, \$189,000
Job Impact: TBD, 16 students trained
Date: 2023

Cattaraugus County EDPT Skilled Trades Event

Sponsor: Cattaraugus County Department of Economic Development, Planning and Tourism
Total Cost: \$78,000; funding sources: ARC, \$39,000, local in-kind, \$39,000
Job Impact: TBD, 1000 youth projected to attend
Date: 2023

Step into Health Care

Sponsor: Southern Tier Health Care System Inc.
Total Cost: \$216,382; funding sources: ARC, \$106,850, local cash, \$10,500, local in-kind, \$99,032
Job Impact: 20 C
Date: 2023

Chautauqua County

Radiologic Technology School Expansion and Partnership

Sponsor: UPMC Chautauqua
Total Cost: \$430,821; funding sources: ARC, \$250,000, local cash, \$180,821
Job Impact: TBD
Date: 2023

Regional

Southern Tier West Good Jobs Challenge Project

Sponsor: Southern Tier West RP&DB
Total cost: TBD; funding sources: EDA, match TBD
Job impact: TBD
Date: 2022



Goal #2: Traditional and Non-Traditional Infrastructure – to maintain and improve the region’s built environment and services

Strategies to accomplish this goal include:

- Maintain and improve transportation infrastructure
- Maintain and improve utility infrastructure
- Improve the region’s “shovel readiness”
- Develop, improve, and expand non-physical or non-traditional infrastructure
- Improve communities

Priority Projects:

Allegany County

Almond Wastewater System Improvements Project with New Line from Alfred

Sponsor: Village of Almond
Total Cost: \$9,000,000; funding sources: EDA, NYSESD, NYSEFC, USDA
Job impact: 350 R / 20 CX
Date: 2023

Crossroads Development Infrastructure System Project

Sponsor: Allegany County
Total cost: \$7,500,000; funding sources: DA, NYSESD, USDA
Job impact: 500 C / 10 R
Date: 2022

Crossroads Water Tank Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$1,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 5 C
Date: 2023

Crossroads Electric Rebuild Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$38,000,000; funding sources: NYSEG, NYPA, NYSESD
Job impact: 100 C
Date: 2025

Friendship to Amity Sewer Line Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$8,500,000; funding sources: EDA, NYSESD, USDA
Job impact: 125 C / 20 R
Date: 2023

Broadband/Fiber Optic Project

Sponsor: Southern Tier West RPDB
Total Cost: \$20,000,000; funding sources: ARC, USDA, other federal sources
Job impact: 100 C
Date: 2023



Wellsville Sewer System Project: C9-6694-01-00

Sponsor: Village of Wellsville
Total Cost: \$9,149,000; funding sources: EDA, NYSESD, NYSEFC, USDA
Job impact: 30 C
Date: 2023

Sugar Hill Industrial Park Development Project, Phase 2

Sponsor: Sugar Hill Development Corporation
Total Cost: \$4,900,000; funding sources: EDA, NYSESD, USDA
Job impact: 30 C
Date: 2023

Alfred Reconstruction of Route 244

Sponsor: Town and Village of Alfred
Total Cost: \$1,625,000; funding sources: NYSEDS
Job impact: 50 C
Date: 2023

Cattaraugus County

Olean City Centre (400-450 North Union Street) Project

Sponsor: City of Olean & Olean Town Centre, LLC
Total cost: \$15,850,000
Job Impact: 80 C
Date: 2021-2023

Connecting Communities: A Multi-Modal Vision for West State Street

Sponsor: City of Olean; U.S. DOT; DOS
Total cost: \$23,200,000
Job Impact: TBD
Date: 2022-2028

West State Street Streetscape Improvements

Sponsor: City of Olean
Total cost: \$1,600,000; funding sources: DRI
Job Impact: TBD
Date: 2023

South Union Street Gateway Corridor

Sponsor: City of Olean
Total cost: \$1,400,000; funding sources: DRI
Job Impact: TBD
Date: 2023



Walkable Olean Phase III (East State Street)

Sponsor: City of Olean
Total cost: \$1,200,000; funding sources: DRI
Job Impact: TBD
Date: 2022-2023

Allegheny River Syphon Decommissioning & Pump Station Construction Project

Sponsor: City of Olean
Total cost: \$1,082,000; funding sources: NYSDEC, City
Job Impact: TBD
Date: 2023

Comprehensive Water Distribution System Plan

Sponsor: City of Olean
Total Cost: \$40,000; funding sources: NYS ESD, Cattaraugus County
Job Impact: TBD
Date: 2023

Salamanca (City) State Park Avenue Upgrade Project

Sponsor: City of Salamanca
Total cost: \$4,000,000; funding sources: TBD
Job impact: TBD
Date: 2023

Great Lakes Cheese Infrastructure Project

Sponsor: Cattaraugus County / Town of Franklinville
Total cost: TBD; funding sources: EDA, Cattaraugus County, Town of Franklinville, HUD, NYS ESD
Job impact: 200 R, 250 C
Date: 2023

Allegheny (Town) I-86 Exit 24 Interchange Wastewater Infrastructure Project

Sponsor: Town of Allegheny
Total cost: TBD; funding sources: Cattaraugus County, Town of Allegheny, HUD
Job impact: 100 C
Date: 2023

Olean/Portville (Town of Portville) Water Line Extension Route 417 Project

Sponsor: Town of Portville
Total cost: TBD; funding sources: EDA, others TBD
Job impact: TBD
Date: 2023

Little Valley (Village) Wastewater Infrastructure Project

Sponsor: Village of Little Valley
Total cost: \$5.1 million; funding sources: EDA, CDBG, NYS & EPG, EFC Loan
Job impact: 0
Date: 2023



Ellicottville (Town) Regional Water Project

Sponsor: Town of Ellicottville
Total cost: \$5.3 million; funding sources: TBD
Job impact: 196 C
Date: 2023

Chautauqua County

Dunkirk Coal Power Plant Redevelopment (NRG Re-Use Alternatives and Feasibility Study Phase II)

Sponsor: Chautauqua County IDA/Chautauqua County/City of Dunkirk
Total Cost: \$80 Million; funding sources: TBD
Job Impact: TBD
Date: 2022

Coal Ash Recycling Project at NRG

Sponsor: City of Dunkirk/Chautauqua County
Total Cost: \$45 Million; funding sources: TBD, ESD, IJA
Job Impact: TBD
Date: 2022

Dunkirk Harbor Breakwaters & Living Shoreline Engineering & Design

Sponsor: City of Dunkirk/Chautauqua County
Total cost: \$0.5 Million; funding sources: TBD (NY Sea Grant, NOAA)
Job impact: TBD
Date: 2022

Development-Ready Site Preparedness Initiative

Sponsor: Chautauqua County IDA/Chautauqua County
Total Cost: \$10 Million; funding sources: TBD
Job Impact: TBD
Date: 2022

Dunkirk Coal Power Plant Redevelopment (NRG Re-Use Phase II)

Sponsor: Chautauqua County IDA/Chautauqua County/City of Dunkirk
Total Cost: TBD
Job Impact: TBD
Date: 2023

Site Acquisition and Infrastructure Development

Sponsor: Chautauqua County IDA/Chautauqua County
Total Cost: TBD
Job Impact: TBD
Date: 2023



Regional

Southern Tier Extension Railroad Authority Railroad Rehabilitation Project

Sponsor: Southern Tier Extension Railroad Authority
Total cost: \$15,000,000; funding sources: TBD (EDA, NYS DOT, FRA, Private)
Job impact: 50 C
Date: 2023

US Route 219 Supplemental EIS Funding Project

Sponsor: NYS DOT
Total cost: \$2,500,000; funding sources: TBD (NYS DOT, US DOT, NYS ESD)
Job impact: TBD
Date: 2022

US Route 219 Construction Project

Sponsor: NS DOT
Total cost: TBD; funding sources: TBD (NYS DOT, US DOT)
Job impact: TBD
Date: 2023

Site Development Planning Project Phase 1

Sponsor: Southern Tier West RP & DB
Total cost: TBD; funding sources: TBD
Job impact: N/A
Date: 2023

Goal #3: Innovation and Entrepreneurship – to catalyze innovation and new business development

Strategies to accomplish this goal include:

- Target economic development activities and initiatives toward significant regional industry clusters and occupation clusters that are value-added and net export clusters
- Promote and catalyze entrepreneurship
- Incentivize and catalyze enhanced business productivity, innovation, technology transfer, technology adoption and commercialization, and collaboration/partnerships between the university, business, and economic development communities
- Provide adequate and innovative business development finance resources, technical assistance, and outreach
- Assist in the retention and expansion of existing regional businesses
- Attract new businesses to the region



Priority Projects:

Allegany County

Sustainable Advanced Manufacturing Centers in Alfred & Wellsville

Sponsor: Alfred State College/ Allegany County IDA
Total Cost: \$4,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 30 C
Date: 2023

ACCT: Alfred Center for Technology Transfer

Sponsor: Allegany County IDA
Total Cost: \$7,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 50 C
Date: 2023

Cattaraugus County

The Hub

Sponsor: Olean Business Development Corporation
Total Cost: \$263,166; funding sources: ARC, \$100,000, local in-kind, \$163,166
Job Impact: 25+ C
Date: 2023

Olean Business Incubation Center Project Phase 2

Sponsor: Olean Business Development Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Chautauqua County

None

Regional

Commercial Bio-Refinery Resource Assessment Project

Sponsor: Seneca Trail Resource Conservation & Development
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Food Aggregation Facility Implementation Project

Sponsor: Southern Tier West RP & DB
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2023



STEDO Revolving Loan Fund Recapitalization Project

Sponsor: Southern Tier Enterprise Development Organization, Inc.
Total Cost: \$300,000; funding sources: ARC \$150,000, private sector loan recipients \$150,000
Job Impact: 22 C
Date: 2023

STEDO Small Business RLF Capitalization Project

Sponsor: Southern Tier Enterprise Development Organization, Inc.
Total cost: \$10,000,000; funding sources: NYS ESD (\$5,000,000), Local Private (\$5,000,000)
Job impact: 80 C
Date: 2023

Goal #4: Quality, Connected Places – to create quality, connected, safe, convenient and healthy places to live and work

Strategies to accomplish this goal include:

- Maintain and improve the region’s cornerstone and community-based and civic institutions and quality of life assets, capacities, and services
- Develop, maintain, and promote a range of housing choices and opportunities for all residents; efficient public transportation systems; safe pedestrian networks; access to quality health care and educational facilities; and other quality of life amenities
- Utilize smart growth principles to ensure cost effective growth and development while minimizing sprawl
- Promote the region’s diversity
- Enhance and promote the region’s cultural, arts, history, and tourism assets, destinations, organizations, and services
- Develop, maintain, and promote integrated connections between communities both across the region and external to the region
- Promote and protect the region’s natural resources in a sustainable manner
- Streamline and reform permitting, development review, and other regulatory processes to provide a predictable legal and regulatory environment for businesses
- Ensure regional and local agencies provide collaborative, seamless, consistent, and timely customer service to business
- Develop a business-friendly regulatory and tax system and business assistance/incentive programs
- Enhance regional marketing capacity and activities



Priority Projects:

Allegany County

Crossroads Business Park Hotel Development Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$15,000,000; funding sources: EDA, NYSESD
Job impact: 30 C
Date: 2023

Emergency Medical Response

Sponsor: Genesee Valley CSD
Total Cost: \$350,264; funding sources: ARC, \$244,750, local in-kind, \$104,514
Job Impact: 1 FT C, 1 PT C, numerous students and community members trained
Date: 2023

Cattaraugus County

Tri-County Arts Council Capacity Building

Sponsor: Tri-County Arts Council
Total Cost: \$42,000; funding sources: ARC, \$21,750, local in-kind, \$21,750
Job Impact: 2 PT C
Date: 2023

African American Cultural Center Project

Sponsor: Olean Business Development Corporation
Total Cost: \$300,000; funding sources: ARC \$150,000, applicant \$150,000
Job Impact: 2 C
Date: 2022=2023

Allegheny River Canoe & Kayak Launch Project

Sponsor: City of Olean
Total cost: \$94,000; funding sources: City of Olean, Cattaraugus County
Job Impact: 6 C
Date: 2022

Oak Hill Park Improvements

Sponsor: City of Olean
Total cost: \$350,000; funding sources: DRI
Job Impact: TBD
Date: 2022-2023

Onoville Marina Expansion Project

Sponsor: Cattaraugus County
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022



Historic Hollywood Theater Project

Sponsor: Gowanda's Historic Hollywood Theater, Ltd.
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Chautauqua County

St. Stephen's Watson Center Rebuild

Sponsor: St. Stephen's Episcopal Church
Total Cost: \$779,900; funding sources: ARC, \$249,568, USDA, \$272,121, local cash, \$257,779
Job Impact: TBD, community benefit project
Date: 2023

Furniture Mart Redevelopment Project

Sponsor: City of Jamestown/ Gebbie Foundation
Total Cost: \$1.8 Million (secured through ESD by way of CFA in 2019); seeking additional \$500,000; funding sources: CFA- ESD; RestoreNY
Job Impact: TBD
Date: 2022-ongoing

Pearl City Arts District: NY Main Street Redevelopment of E 2nd Street

Sponsor: City of Jamestown
Total Cost: TBD; funding sources: CFA- NY Main Street
Job Impact: TBD
Date: 2022-ongoing

Goal #5: Collaborative Leadership – to encourage coordinated governance and rational and coordinated systemic investment in targeted economic development initiatives

Strategies to accomplish this goal include:

- Encourage, at the community, county, and regional levels, comprehensive and strategic economic development planning; develop and implement community and economic development projects consistent with those plans and with smart growth principles and sound environment principles; and create capital funds to implement projects
- Improve coordination and collaboration between and among all levels of government as well as the private sector, including enhancing public-private partnerships, and make strategic investments that are aligned with and further regional priorities
- Improve leadership training and enhance public involvement in coordinating decision-making and investments at the regional level
- Seneca Nation of Indians initiatives
- Improve economic resilience through appropriate steady-state actions (avoidance, prevention, and mitigation of economic disruptions) and response actions (response to economic disruptions)



Priority Projects:

Allegany County

None

Cattaraugus County

City of Olean Comprehensive Development Plan Project

Sponsor: City of Olean; ESD; DOS
 Total cost: \$100,000
 Job Impact: TBD
 Date: 2022-2023

Chautauqua County

Brownfield Opportunity Area Site Assessments/Site Readiness

Sponsor: City of Jamestown
 Total Cost: \$500,000; funding sources: TBD – apply for BOA through CFA and EPA
 Job Impact: TBD
 Date: 2022

Chadakoin River Strategic Business Plan Implementation

Sponsor: Chautauqua County IDA/City of Jamestown/Chautauqua County Partnership for Economic Growth/ Gebbie Foundation/ Jamestown Board of Public Utilities/ Chautauqua County Watershed Conservancy/ Roger Tory Peterson Institute
 Total Cost: \$1.2 Million (secured for Chadakoin River Basin Activation Project in 2022); Additional funding for numerous projects that will contribute to implementation is being sought; funding sources: CFA- WQIP, ESD, DOS
 Job Impact: TBD
 Date: 2022-ongoing

Regional

County-Level Economic Resilience (Disaster Response and Recovery) Planning Project

Sponsor: County P&D, Southern Tier West
 Total cost: \$ TBD; funding sources: TBD
 Job impact: TBD
 Date: 2023

GIS Project to Identify Major Employers in Floodplains

Sponsor: County P&D, Southern Tier West
 Total cost: \$ TBD; funding sources: TBD
 Job impact: TBD
 Date: 2023



Business Risk Assessment Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Agricultural Business Risk Assessment / Information Dissemination Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Business Risk Self-Assessment Web Cookbook Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Surge Capital/Credit Fund Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Community Infrastructure/Asset Mitigation Project

Sponsor: Municipalities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Utility/Broadband Infrastructure Mitigation Project

Sponsor: Private Utilities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023



Project Lists

The region’s Action Plan is made more specific by the specification of certain priority strategic projects, programs, and activities. This CEDS actually provides four separate project lists:

- (1) a list of priority EDA projects
- (2) a list of priority ARC projects
- (3) a comprehensive list of all priority economic development projects in the region (including but not limited to the EDA and ARC priority projects from the other two lists)
- (4) a list of economic resilience projects.

Priority EDA Projects

The first list of projects is a list of projects that the Southern Tier West Board designated in July 2022 as being priorities for EDA investment. This list identifies the top two EDA investment (project) priorities for each county in the region, and also identifies priorities for EDA funding for regional (i.e., non-county-specific) projects impacting more than one county. With one exception, all of the projects in this EDA priority project list are seeking EDA public works funding; the one exception is a regional project seeking EDA technical assistance funding. Within each county, projects are listed in order of descending priority. The projects in this list were identified to the Southern Tier West Board by the individual counties, which also had indicated their own relative priorities for each project. Over the course of the coming year, the Southern Tier West Board may amend this list, including priorities within individual counties, as circumstances warrant.

All of the projects in the EDA Project List are designated by the Southern Tier West Board as priority projects, and accordingly are included in the Action Plan in this CEDS.

Allegany County

1. Crossroads Development Infrastructure System Project

Description: Construction of infrastructure at the County Route 20 / NYS Route 19 intersection to support business development at I86 Exit 30 interchange

Sponsor: Allegany County

Job impact: 120 C / 10 R

Total cost: \$7,500,000

Date: 2023



2. Alfred-Almond Sewer Project

Description: Construction of intermunicipal wastewater collection system in the Towns of Alfred, Almond and the Village of Almond. Will service numerous businesses, Alfred-Almond Central School and the entire Village of Almond that currently has no sewer system. All effluent will be sent to and processed by the Village of Alfred WWTP.

Sponsor: Town of Almond TBD
Total cost: \$10,550,000
Job impact: 120 C/ 250 R
Date: 2023

Cattaraugus County

1. Great Lakes Cheese Infrastructure Project

Description: Construction of infrastructure to facilitate location of manufacturing plant

Sponsor: Cattaraugus County / Town of Franklinville
Total cost: TBD; funding sources: EDA, Cattaraugus County, Town of Franklinville, HUD, NYS ESD
Job impact: 200 R, 250 C
Date: 2022

2. Allegany (Town) I-86 Exit 24 Interchange Wastewater Infrastructure Project

Description: Construction of infrastructure to facilitate redevelopment of large facility

Sponsor: Town of Allegany
Total cost: TBD; funding sources: Cattaraugus County, Town of Allegany, HUD
Job impact: 100 C
Date: 2022

Chautauqua County

1. Dunkirk Coal Power Plant Redevelopment (NRG Re-Use Phase II)

Description: Redevelopment of site of closed coal power plant
Sponsor: Chautauqua County IDA/Chautauqua County/City of Dunkirk
Total Cost: TBD
Job Impact: TBD
Date: 2023

2. Site Acquisition and Infrastructure Development

Description: Acquisition of and infrastructure development at proposed industrial site
Sponsor: Chautauqua County IDA/Chautauqua County
Total Cost: TBD
Job Impact: TBD
Date: 2023



Regional Projects

1. Southern Tier West Good Jobs Challenge Project

Sponsor: Southern Tier West RP&DB
Total cost: TBD; funding sources: EDA, match TBD
Job impact: TBD
Date: 2022

2. Southern Tier Extension Railroad Authority Railroad Rehabilitation Project (EDA public works funding)

Description: Railroad line capital rehabilitation at various points along mainline railroad
Sponsor: Southern Tier Extension Railroad Authority
Total cost: \$15,000,000; funding sources: TBD (EDA, NYS DOT, FRA, Private)
Job impact: 50 C
Date: 2023

3. Site Development Planning Project Phase 1 (EDA technical assistance funding)

Description: Planning project to support development of shovel ready railroad-served sites
Sponsor: Southern Tier West RP & DB
Total cost: TBD; funding sources: TBD
Job impact: N/A
Date: 2023



Priority ARC Projects

The second project list is a list of projects that the Southern Tier West Board designated in July 2022 as being economic development priorities for funding by the Appalachian Regional Commission (“ARC”).

The projects in this list are grouped in three categories as designated by the Southern Tier West Board.

- The “High Category” is a group of projects that the Board considers most likely that ARC will have funds available to fund.
- The “Medium Category” is a group of projects that the Board considers less likely that ARC will have funds available to fund.
- The “Lower Category” is a group of projects that the Board considers even less likely that ARC will have funds available to fund.

Within each category, projects are not ranked or ordered.

All of the projects in the ARC Project List are designated by the Southern Tier West Board as priority projects, and accordingly are included in the Action Plan in this CEDS.

Key: **C** = Private sector for-profit Jobs projected to be created as a consequence of the project

R = Private sector for-profit Jobs projected to be retained as a consequence of the project

FTE = Full Time Equivalent

TBD or N/A = to be determined or not applicable or available at time of CEDS publication

High Category

Heavy Equipment Operations Program: Virtual Simulation Laboratory

Sponsor: Alfred State College of Technology

Total Cost: \$285,714; funding sources: ARC, \$200,000, local cash, \$55,679, local in-kind \$30,035

Job Impact: TBD; 80 students trained, and 15 workers trained

Date: 2023

Building the Future Forward

Sponsor: Belfast Central School District

Total Cost: \$356,136; funding sources: ARC, \$243,103, local in-kind, \$113,033

Job Impact: TBD, 3 part time jobs to support instruction, 20 students trained

Date: 2023



CDL-A

Sponsor: CA-BOCES
Total Cost: \$378,624; funding sources: ARC, \$189,000, local in-kind, \$189,000
Job Impact: TBD, 16 students trained
Date: 2023

Cattaraugus County EDPT Skilled Trades Event

Sponsor: Cattaraugus County Department of Economic Development, Planning and Tourism
Total Cost: \$78,000; funding sources: ARC, \$39,000, local in-kind, \$39,000
Job Impact: TBD, 1000 youth projected to attend
Date: 2023

Tri-County Arts Council Capacity Building

Sponsor: Tri-County Arts Council
Total Cost: \$42,000; funding sources: ARC, \$21,750, local in-kind, \$21,750
Job Impact: 2 PT C
Date: 2023

Emergency Medical Response

Sponsor: Genesee Valley CSD
Total Cost: \$350,264; funding sources: ARC, \$244,750, local in-kind, \$104,514
Job Impact: 1 FT C, 1 PT C, numerous students and community members trained
Date: 2023

St. Stephen's Watson Center Rebuild

Sponsor: St. Stephen's Episcopal Church
Total Cost: \$779,900; funding sources: ARC, \$249,568, USDA, \$272,121, local cash, \$257,779
Job Impact: TBD, community benefit project
Date: 2023

Medium Category

The Hub

Sponsor: Olean Business Development Corporation
Total Cost: \$263,166; funding sources: ARC, \$100,000, local in-kind, \$163,166
Job Impact: 25+ C
Date: 2023



Step into Health Care

Sponsor: Southern Tier Health Care System Inc.

Total Cost: \$216,382; funding sources: ARC, \$106,850, local cash, \$10,500, local in-kind, \$99,032

Job Impact: 20 C

Date: 2023

Lower Category

Radiologic Technology School Expansion and Partnership

Sponsor: UPMC Chautauqua

Total Cost: \$430,821; funding sources: ARC, \$250,000, local cash, \$180,821

Job Impact: TBD

Date: 2023



Comprehensive Project List of Economic Development Projects

The third project list is a comprehensive list of ready-to-go economic development projects that are planned by sponsors to be implemented over the next 12 to 18 months (i.e., through the end of 2023). As noted above, this third list includes the designated EDA and ARC priority projects that also are indicated in the above EDA and ARC Project Lists.

All of the projects in this list are economic development projects, programs, and activities that Southern Tier West suggests should be implemented so as to implement the Goals and Objectives of this CEDS. Readers of the CEDS should note certain overarching "themes" for regional economic development in this third list (e.g., infrastructure development, technology, labor force, etc.). Readers of the CEDS also are encouraged to view the projects in the project list in terms of prior related investments.

The Comprehensive Project List has four sections: Allegany County Projects, Cattaraugus County Projects, Chautauqua County Projects, and Regional Projects. Within each of these four sections, projects are not ranked or prioritized, with one exception: the highest priority projects within each section are highlighted in yellow and appear at the top of the list in each of the four sections. These highlighted projects also are found in the Action Plan chapter of the CEDS. For each of the four sections, the yellow-highlighted projects are listed first, regardless of sponsor, and are indicated by the subgroup title "Priority Projects." Also, within each of these four sections, projects other than these priority projects are grouped together by subgroups by type of sponsor (e.g., County-Led, City-Led, Village-Led or Town-Led, College-Led, and Other.). Other than the Priority Projects subgroup, there is no other ordering or ranking within a given section, or within any of the subgroups thereunder, or as between the four sections. (Note: Economic Resilience Projects are listed subsequently in a separate list.)

The project list identifies projects by project name, project sponsor, total project cost and funding sources and amounts (if known), projected private sector for-profit jobs to be created and/or retained as a consequence of the implementation of the project (if known), and projected date of implementation (if known).

Projects included in this project list include – but are not limited to – those projects that propose the use of either or both ARC and EDA funds as project funding source(s).

Key: **C** = Private sector for-profit Jobs projected to be created as a consequence of the project

R = Private sector for-profit Jobs projected to be retained as a consequence of the project

FTE = Full Time Equivalent

TBD or N/A = to be determined or not applicable or available at time of CEDS publication

The titles of the highest priority projects are highlighted in yellow.



Allegany County Projects

Priority Projects

Almond Wastewater System Improvements Project with New Line from Alfred

Sponsor: Village of Almond
Total Cost: \$9,000,000; funding sources: EDA, NYSESD, NYSEFC, USDA
Job impact: 350 R / 20 CX
Date: 2023

Crossroads Development Infrastructure System Project

Sponsor: Allegany County
Total cost: \$7,500,000; funding sources: DA, NYSESD, USDA
Job impact: 500 C / 10 R
Date: 2022

Crossroads Business Park Hotel Development Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$15,000,000; funding sources: EDA, NYSESD
Job impact: 30 C
Date: 2023

Crossroads Water Tank Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$1,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 5 C
Date: 2023

Crossroads Electric Rebuild Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$38,000,000; funding sources: NYSEG, NYPA, NYSESD
Job impact: 100 C
Date: 2025

Friendship to Amity Sewer Line Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$8,500,000; funding sources: EDA, NYSESD, USDA
Job impact: 125 C / 20 R
Date: 2023



Broadband/Fiber Optic Project

Sponsor: Southern Tier West RPDB
Total Cost: \$20,000,000; funding sources: ARC, USDA, other federal sources
Job impact: 100 C
Date: 2023

Wellsville Sewer System Project:C9-6694-01-00

Sponsor: Village of Wellsville
Total Cost: \$9,149,000; funding sources: EDA, NYSESD, NYSEFC, USDA
Job impact: 30 C
Date: 2023

Sugar Hill Industrial Park Development Project, Phase 2

Sponsor: Sugar Hill Development Corporation
Total Cost: \$4,900,000; funding sources: EDA, NYSESD, USDA
Job impact: 30 C
Date: 2023

Sustainable Advanced Manufacturing Centers in Alfred & Wellsville

Sponsor: Alfred State College/ Allegany County IDA
Total Cost: \$4,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 30 C
Date: 2023

ACCT: Alfred Center for Technology Transfer

Sponsor: Allegany County IDA
Total Cost: \$7,000,000; funding sources: EDA, NYSESD, USDA
Job impact: 50 C
Date: 2023

Alfred Reconstruction of Route 244

Sponsor: Town and Village of Alfred
Total Cost: \$1,625,000; funding sources: NYSEDS
Job impact: 50 C
Date: 2023

Heavy Equipment Operations Program: Virtual Simulation Laboratory

Sponsor: Alfred State College of Technology
Total Cost: \$285,714; funding sources: ARC, \$200,000, local cash, \$55,679, local in-kind \$30,035
Job Impact: TBD; 80 students trained, and 15 workers trained
Date: 2023



Building the Future Forward

Sponsor: Belfast Central School District
Total Cost: \$356,136; funding sources: ARC, \$243,103, local in-kind, \$113,033
Job Impact: TBD, 3 part time jobs to support instruction, 20 students trained
Date: 2023

Emergency Medical Response

Sponsor: Genesee Valley CSD
Total Cost: \$350,264; funding sources: ARC, \$244,750, local in-kind, \$104,514
Job Impact: 1 FT C, 1 PT C, numerous students and community members trained
Date: 2023

County-Led Projects

Railroad Spur and Switch Gears Project; CR 20 S-Curve Site

Sponsor: Allegany County IDA
Total Cost: \$500,000; funding sources: EDA, NYSESD
Job impact: 50 C
Date: 2023

Low Tech Incubator in a Hub Community

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$400,000; funding sources: ARC, EDA, NYSEDS
Job impact: 30 C
Date: 2023

VanCampen Industrial Park Access Road Project; CR 20 S-Curve Site

Sponsor: Allegany County IDA
Total Cost: \$750,000; funding sources: USDOT, NYSDOT, EDA, USDA
Job impact: 50 C
Date: 2023

Allegany County Small Business RLF Project

Sponsor: Allegany County Office of Development
Total Cost: \$400,000; sources: GOSC Small Cities, EDA, NYSESD, ARC, USDA
Job impact: 20 C
Date: 2022



Town-Led and Village-Led Projects

Water Tank Replacement on Sugar Hill

Sponsor: New LDC
Total Cost: \$900,000; funding sources: NYSEFC
Job impact: 50 C
Date: 2023

Almond Water Storage and Distribution System Project Phase 2

Sponsor: Village of Almond
Total Cost: \$3,492,000; funding sources: NYSEFC
Job impact: 50 R
Date: 2023

Andover Public Water Project

Sponsor: Village of Andover
Total Cost: \$16,897,674; funding sources: NYSEFC
Job impact: 225 R
Date: 2023

Andover Sewer System Project:C9-6695-01-00

Sponsor: Village of Andover
Total Cost: \$19,617,000; funding sources: NYSEFC
Job impact: 225 R
Date: 2023

Andover Main Street Project

Sponsor: Village of Andover
Total Cost: \$250,000; funding sources: NYSESD, USDA
Job impact: 30 R
Date: 2023

Angelica School Restoration/Renovation Project

Sponsor: New LDC
Total Cost: \$2,250,000; funding sources: HUD, CDBG
Job impact: 30 C
Date: 2023

Belmont Water Distribution Project

Sponsor: Village of Belmont
Total Cost: \$900,000; funding sources: NYSEFC
Job impact: 400 R
Date: 2023



Belmont School Restoration/Renovation Project

Sponsor: New LDC
Total Cost: \$9,800,000; funding sources: EDA, NYSESD, NYSEFC, USDA, HUD, CDBG
Job impact: 100 C
Date: 2023

Bolivar Water System Upgrade Project

Sponsor: Village of Bolivar
Total Cost: \$790,000; funding sources: NYSEFC
Job impact: 100 R
Date: 2023

Canaseraga Water Distribution System Project

Sponsor: Village of Canaseraga
Total Cost: \$2,039,915; funding sources: NYSEFC
Job impact: 75 R
Date: 2023

Canaseraga Sewer System Project:C9-6607-02-00

Sponsor: Village of Canaseraga
Total Cost: \$1,660,000; funding sources: NYSEFC
Job impact: 75 R
Date: 2023

Canaseraga Trail System Development Project

Sponsor: Town of Burns, Town of Grove, Finger Lakes Trail, Interested parties
Total Cost: \$500,000; funding sources: NYS Parks, Parks and Trails, Wilson Foundation
Job impact: 15 C
Date: 2023

Caneadea Sewer System Project:C9-6667-02-00

Sponsor: Town of Caneadea
Total Cost: \$1,557,000; funding sources: NYSEFC
Job impact: 75 R
Date: 2023

Cuba Main Street Enhancement Project

Sponsor: Village of Cuba
Total Cost: \$702,000; funding sources: NYSESD, USDA
Job impact: 25 R
Date: 2023



Cuba Wastewater Collection and Treatment System Improvements Project

Sponsor: Village of Cuba
Total Cost: \$8,773,000; funding sources: NYSEFC
Job impact: 250 R
Date: 2023

Friendship Downtown Revitalization Project

Sponsor: Town of Friendship
Total Cost: \$400,000; funding sources: NYSESD, USDA
Job impact: 100 C
Date: 2023

Friendship Water Source and Distribution System Project

Sponsor: Town of Friendship
Total Cost: \$1,030,000; funding sources: NYSEFC
Job impact: 200 R
Date: 2023

Hume Sewer System Project:C9-6627-01-00

Sponsor: Town of Hume
Total Cost: \$3,846,000; funding sources: NYSEFC
Job impact: 200 R
Date: 2023

Wellsville Wastewater Treatment Plant Update Project

Sponsor: Village of Wellsville
Total Cost: \$13,700,000; funding sources: NYSEFC
Job impact: 500 R
Date: 2023

Wellsville Water Distribution System Update Project

Sponsor: Village of Wellsville
Total Cost: \$3,500,000; funding sources: NYSEFC
Job impact: 500 R
Date: 2023

Wellsville Route 417 East Wastewater System Project

Sponsor: Town of Wellsville
Total Cost: \$2,000,000; funding sources: NYSEFC
Job impact: 400 R
Date: 2023



Wellsville Parks and Recreation Development

Sponsor: Town of Wellsville

Total Cost: \$1,300,000; funding sources: NYS Parks, Parks and Trails, Wilson Foundation

Job impact: 10 C

Date: 2023

Wellsville Airport Southside Apron Area Project

Sponsor: Town of Wellsville

Total Cost: \$880,000; funding sources: FAA

Job impact: 10 R

Date: 2023

College-Led Projects

Small Wind Laboratory Project

Sponsor: Alfred State College

Total Cost: \$562,000; funding sources: ARC

Job impact: 10 C

Date: 2023

Other Projects

West Almond Trail Upgrade Project

Sponsor: NYSDEC

Total Cost: \$1,456,000; funding sources: NYS Parks, Parks and Trails, Wilson Foundation

Job impact: 5 C

Date: 2023

Agricultural Marketing Opportunities Project

Sponsor: Private/Public Partnership

Total Cost: \$100,000; funding sources: USDA

Job impact: 10 C

Date: 2023

Food Processing Facility for Organic/Sustainable Farming

Sponsor: Private/Public Partnership

Total Cost: \$125,000; funding sources: USDA

Job impact: 20 C

Date: 2023



Genesee River Wilds Park Project

Sponsor: Genesee River Wilds, Inc.

Total Cost: \$400,000; funding sources: NYS Parks, Parks and Trails, Wilson Foundation

Job impact: 30 C

Date: 2023

Barrelhouse Convention Center

Sponsor: Allegany Trails

Total Cost: \$8,000,000; funding sources: NYSED

Job impact: 50 C

Date: 2023



Cattaraugus County Projects

Priority Projects:

African American Cultural Center Project

Sponsor: Olean Business Development Corporation
Total Cost: \$300,000; funding sources: ARC \$150,000, applicant \$150,000
Job Impact: 2 C
Date: 2022=2023

City of Olean Comprehensive Development Plan Project

Sponsor: City of Olean; ESD; DOS
Total cost: \$100,000
Job Impact: TBD
Date: 2022-2023

Olean City Centre (400-450 North Union Street) Project

Sponsor: City of Olean & Olean Town Centre, LLC
Total cost: \$15,850,000
Job Impact: 80 C
Date: 2021-2023

Connecting Communities: A Multi-modal Vision for West State Street

Sponsor: City of Olean; U.S. DOT; DOS
Total cost: \$23,200,000
Job Impact: TBD
Date: 2022-2028

Allegheny River Canoe & Kayak Launch Project

Sponsor: City of Olean
Total cost: \$94,000; funding sources: City of Olean, Cattaraugus County
Job Impact: 6 C
Date: 2022

West State Street Streetscape Improvements

Sponsor: City of Olean
Total cost: \$1,600,000; funding sources: DRI
Job Impact: TBD
Date: 2023



South Union Street Gateway Corridor

Sponsor: City of Olean
Total cost: \$1,400,000; funding sources: DRI
Job Impact: TBD
Date: 2023

Walkable Olean Phase III (East State Street)

Sponsor: City of Olean
Total cost: \$1,200,000; funding sources: DRI
Job Impact: TBD
Date: 2022-2023

Oak Hill Park Improvements

Sponsor: City of Olean
Total cost: \$350,000; funding sources: DRI
Job Impact: TBD
Date: 2022-2023

Allegheny River Syphon Decommissioning & Pump Station Construction Project

Sponsor: City of Olean
Total cost: \$1,082,000; funding sources: NYSDEC, City
Job Impact: TBD
Date: 2023

Comprehensive Water Distribution System Plan

Sponsor: City of Olean
Total Cost: \$40,000; funding sources: NYS ESD, Cattaraugus County
Job Impact: TBD
Date: 2023

CDL-A

Sponsor: CA-BOCES
Total Cost: \$378,624; funding sources: ARC, \$189,000, local in-kind, \$189,000
Job Impact: TBD, 16 students trained
Date: 2023

Cattaraugus County EDPT Skilled Trades Event

Sponsor: Cattaraugus County Department of Economic Development, Planning and Tourism
Total Cost: \$78,000; funding sources: ARC, \$39,000, local in-kind, \$39,000
Job Impact: TBD, 1000 youth projected to attend
Date: 2023



Step into Health Care

Sponsor: Southern Tier Health Care System Inc.
Total Cost: \$216,382; funding sources: ARC, \$106,850, local cash, \$10,500, local in-kind, \$99,032
Job Impact: 20 C
Date: 2023

The Hub

Sponsor: Olean Business Development Corporation
Total Cost: \$263,166; funding sources: ARC, \$100,000, local in-kind, \$163,166
Job Impact: 25+ C
Date: 2023

Tri-County Arts Council Capacity Building

Sponsor: Tri-County Arts Council
Total Cost: \$42,000; funding sources: ARC, \$21,750, local in-kind, \$21,750
Job Impact: 2 PT C
Date: 2023

Great Lakes Cheese Infrastructure Project

Sponsor: Cattaraugus County / Town of Franklinville
Total cost: TBD; funding sources: EDA, Cattaraugus County, Town of Franklinville, HUD, NYS ESD
Job impact: 200 R, 250 C
Date: 2022

Allegany (Town) I-86 Exit 24 Interchange Wastewater Infrastructure Project

Sponsor: Town of Allegany
Total cost: TBD; funding sources: Cattaraugus County, Town of Allegany, HUD
Job impact: 100 C
Date: 2022

Onoville Marina Expansion Project

Sponsor: Cattaraugus County
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Olean/Portville (Town of Portville) Water Line Extension Route 417 Project

Sponsor: Town of Portville
Total cost: TBD; funding sources: EDA, others TBD
Job impact: TBD
Date: 2022



Little Valley (Village) Wastewater Infrastructure Project

Sponsor: Village of Little Valley
Total cost: \$5.1 million; funding sources: EDA, CDBG, NYS & EPG, EFC Loan
Job impact: 0
Date: 2022

Salamanca (City) State Park Avenue Upgrade Project

Sponsor: City of Salamanca
Total cost: \$4,000,000; funding sources: TBD
Job impact: TBD
Date: 2022

Ellicottville (Town) Regional Water Project

Sponsor: Town of Ellicottville
Total cost: \$5.3 million; funding sources: TBD
Job impact: 196 C
Date: 2022

Olean Business Incubation Center Project Phase 2

Sponsor: Olean Business Development Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Historic Hollywood Theater Project

Sponsor: Gowanda's Historic Hollywood Theater, Ltd.
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

County-Led Projects:

None

City-Led Projects:

North Union Street Streetscape

Sponsor: City of Olean
Total cost: \$900,000; funding sources: DRI
Job Impact: TBD
Date: 2022-2023



Downtown Revitalization & Rehabilitation Fund

Sponsor: City of Olean & Olean Business Development
Total cost: \$600,000
Job Impact: TBD
Date: 2022-2023

Olean Downtown Revitalization Project Phase 2

Sponsor: Olean Business Development Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021-2022

Forness Park Campus-Wide Project

Sponsor: City of Olean
Total cost: \$2,700,000; funding sources: TBD
Job Impact: TBD
Date: 2022-2024

Seneca Allegany Boulevard Access Road Project

Sponsor: City of Salamanca
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Forness Park Pedestrian and Bicycle Path Project

Sponsor: City of Olean
Total cost: \$300,000; funding sources: NYS, NYS OPRHP, NYS DOT
Job impact: TBD
Date: 2022

Town-Led and Village-Led Projects:

Allegany (Village) Municipal Water System Project

Sponsor: Village of Allegany
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Ashford (Town) Water System Upgrade Project

Sponsor: Town of Ashford
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022



Portville Transportation Improvement Project

Sponsor: Town and Village of Portville

Total cost: TBD; funding sources: US DOT (\$2,000,000), other sources TBD

Job impact: TBD

Date: 2022

College-Led Projects:

None

Other Projects:

Cultural and Performing Arts Center Planning Project

Sponsor: Tri-County Arts Council

Total cost: TBD; funding sources: TBD

Job impact: N/A

Date: 2023

Cultural and Performing Arts Center Construction Project

Sponsor: Tri-County Arts Council

Total cost: TBD; funding sources: TBD

Job impact: TBD

Date: 2024

Community Composting Enterprise Demonstration Project

Sponsor: BF Compost, LLC.

Total cost: \$1,250,000; funding sources: NYSERDA (\$1,000,000), local private (\$250,000 applicant equity)

Job impact: 2 C / 4 R

Date: 2022



Chautauqua County Projects

Priority Projects

Dunkirk Coal Power Plant Redevelopment (NRG Re-Use Alternatives and Feasibility Study Phase II)

Sponsor: Chautauqua County IDA/Chautauqua County/City of Dunkirk
Total Cost: \$80 Million; funding sources: TBD
Job Impact: TBD
Date: 2022

Coal Ash Recycling Project at NRG

Sponsor: City of Dunkirk/Chautauqua County
Total Cost: \$45 Million; funding sources: TBD, ESD, IJJA
Job Impact: TBD
Date: 2022

Dunkirk Harbor Breakwaters & Living Shoreline Engineering & Design

Sponsor: City of Dunkirk/Chautauqua County
Total cost: \$0.5 Million; funding sources: TBD (NY Sea Grant, NOAA)
Job impact: TBD
Date: 2022

Development-Ready Site Preparedness Initiative

Sponsor: Chautauqua County IDA/Chautauqua County
Total Cost: \$10 Million; funding sources: TBD
Job Impact: TBD
Date: 2022

Radiologic Technology School Expansion and Partnership

Sponsor: UPMC Chautauqua
Total Cost: \$430,821; funding sources: ARC, \$250,000, local cash, \$180,821
Job Impact: TBD
Date: 2023

St. Stephen's Watson Center Rebuild

Sponsor: St. Stephen's Episcopal Church
Total Cost: \$779,900; funding sources: ARC, \$249,568, USDA, \$272,121, local cash, \$257,779
Job Impact: TBD, community benefit project
Date: 2023



Brownfield Opportunity Area Site Assessments/ Site Readiness

Sponsor: City of Jamestown
Total Cost: \$500,000; funding sources: TBD – apply for BOA through CFA and EPA
Job Impact: TBD
Date: 2022

Chadakoin River Strategic Business Plan Implementation

Sponsor: Chautauqua County IDA/City of Jamestown/Chautauqua County Partnership for Economic Growth/ Gebbie Foundation/ Jamestown Board of Public Utilities/ Chautauqua County Watershed Conservancy/ Roger Tory Peterson Institute
Total Cost: \$1.2 Million (secured for Chadakoin River Basin Activation Project in 2022); Additional funding for numerous projects that will contribute to implementation is being sought; funding sources: CFA- WQIP, ESD, DOS
Job Impact: TBD
Date: 2022-ongoing

Furniture Mart Redevelopment

Sponsor: City of Jamestown/ Gebbie Foundation
Total Cost: \$1.8 Million (secured through ESD by way of CFA in 2019); seeking additional \$500,000; funding sources: CFA- ESD; RestoreNY
Job Impact: TBD
Date: 2022-ongoing

Pearl City Arts District: NY Main Street Redevelopment of E 2nd Street

Sponsor: City of Jamestown
Total Cost: TBD; funding sources: CFA- NY Main Street
Job Impact: TBD
Date: 2022-ongoing

County Led Projects

Develop Right-Sized Industrial Spec Building

Sponsor: Chautauqua County
Total cost: \$30 Million; funding sources: TBD
Job impact: TBD
Date: 2022

Chadakoin River Activation and Development Initiative

Sponsor: City of Jamestown/ Chautauqua County IDA /Gebbie Foundation
Total Cost: \$20 Million; funding sources: TBD
Job Impact: TBD
Date: 2022



Ripley Gateway Project

Sponsor: Chautauqua County
Total Cost: \$15 Million; funding sources: TBD
Job Impact: TBD
Date: 2022

Jamestown YMCA

Sponsor: YMCA/Chautauqua County IDA
Job Impact: TBD
Total Cost: \$35 Million
Date: 2022

Silver Creek Senior Housing Apartments

Sponsor: Chautauqua County IDA
Job Impact: TBD
Total Cost: \$25 Million
Date: 2022

Empire State Brands Integrated Hops & Barley Processing Facility Project

Sponsor: Chautauqua County IDA/Chautauqua County/City of Dunkirk
Job Impact: TBD
Total Cost: \$15 Million
Date: 2022

Chautauqua County Agriculture Sector Diversification Initiative

Sponsor: Chautauqua County IDA/Chautauqua County/Cornell Cooperative Extension
Job Impact: TBD
Total Cost: \$4 Million; funding sources: TBD
Date: 2022

Establish World-Class Center for Advanced Production

Sponsor: Chautauqua County
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Chautauqua Lake Aquatic Ecosystem Restoration Project (Feasibility Study)

Sponsor: Chautauqua County, United States Army Corps of Engineers
Total Cost: \$3 Million Funding Sources: Chautauqua County and United States Army Corps of Engineers
Job Impact: TBD
Date: 2023



South Chautauqua Lake Sewer District Westside Sewer Extension Phase 2

Sponsor: Chautauqua County
Total cost: \$24 Million; funding sources: USDA RD, EDA, ARC, NYS ESD, NYS DEC, NYS EFC, NYS DHCR, local public
Job impact: TBD
Date: 2024

Chautauqua Lake Water District

Sponsor: Chautauqua County, Towns of North Harmony and Chautauqua
Total Cost: \$421 Million
Job Impact: TBD
Date: 2024

Northern Chautauqua County Water District Interconnections and Storage

Sponsor: Chautauqua County
Total cost: \$10 Million; funding sources: NYSDEC, EFC
Job impact: TBD
Date: 2024

Barcelona Harbor to Chautauqua Institution Shared Use Trail Project

Sponsor: Chautauqua County Department of Planning and Economic Development
Total cost: \$5 - 10 million; funding sources: TBD
Job impact: TBD
Date: 2022/2023

Edgewood Site Redevelopment Phase II (remediation/demolition/rehab) Project

Sponsor: County IDA
Total cost: \$13 million; funding sources: TBD (\$3 million public, \$10 million private investment)
Job impact: 50 – 100 jobs created
Date: 2022

Ripley Interstate Site Infrastructure Project

Sponsor: Chautauqua County IDA
Total cost: \$2 Million; funding sources: TBD
Job impact: 300 C - 600 C
Date: 2022

Chautauqua County Airports Capital Improvements

Sponsor: Chautauqua County
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021



CARTS Workforce Transportation Project

Sponsor: Chautauqua County/WIB
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Tourism Transportation Shuttle

Sponsor: Chautauqua County/CCIDA/CCPEG
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Mason Industrial Park Expansion Project

Sponsor: Chautauqua County IDA
Total cost: \$2,500,000; funding sources: TBD
Job impact: TBD
Date: 2022

Routes 5 & 20, Irving Area Commercial Development Project

Sponsor: Chautauqua County IDA
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Phase II - Implementation of the Northern Chautauqua County LWRP

Sponsor: Chautauqua County
Total cost: \$160,000; funding sources: TBD
Sponsor: TBD
Date: 2022

Cattaraugus Creek Harbor Operation & Maintenance

Sponsor: United States Army Corps of Engineers
Total cost: \$6.2 Million; funding sources: United States Army Corps of Engineers
Job impact: TBD
Date: 2022



Cattaraugus Creek Harbor Dredging (Non-Federal)

Sponsor: Town of Hanover, Chautauqua County
Total Cost: \$100,000
Job Impact: TBD
Date: 2022

Dunkirk Harbor Breakwater Extension Project

Sponsor: City of Dunkirk/Chautauqua County
Total cost: \$13 Million; funding sources: TBD
Job impact: TBD
Date: 2023

Dunkirk Harbor Operation & Maintenance

Sponsor: United States Army Corps of Engineers
Total cost: \$11.3 Million; funding sources: United States Army Corps of Engineers
Job impact: TBD
Date: 2022

Dunkirk Harbor Dredging (Non-Federal)

Sponsor: City of Dunkirk, Chautauqua County
Total Cost: \$100,000
Job Impact: TBD
Date: 2022

Barcelona Harbor Operation & Maintenance

Sponsor: United States Army Corps of Engineers
Total cost: \$6.5 Million; funding sources: USACE
Job impact: TBD
Date: 2022

Barcelona Harbor Recreational Dredging (Non-Federal)

Sponsor: Town of Westfield, Chautauqua County
Total cost: \$100,000
Job Impact : TBD
Date: 2022

Agricultural Development and Enhancement Strategy Implementation

Sponsor: Chautauqua County Department of Planning and Development
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022



Talent Attraction and Retention Initiative

Sponsor: CCIDA/CCPEG
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Business Assistance for Improving Workplace Culture

Sponsor: CCIDA/CCPEG
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Housing Market Action Plan

Sponsor: CCIDA/CCPEG
Total cost: \$60,000; funding sources: TBD
Job impact: TBD
Date: 2022

Consolidated Code Administration and Enforcement Feasibility Study

Sponsor: CCIDA/CCPEG
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Village of Mayville Strategic Waterfront Activation

Sponsor: CCIDA/CCPEG/Village of Mayville
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

City Led Projects

Activation of Chadakoin & Comedy Center Riverfront

Sponsor: National Comedy Center, City of Jamestown
Total Cost: \$292,437; funding sources: ARC, \$146,219, NCC, \$146,219
Job Impact: TBD
Date: 2022

A Multidisciplinary Response to Restore Hope and Help Victims Become Thriving Survivors

Sponsor: The Justice Center for Children and Families INC.
Total Cost: \$300,000; funding sources: ARC, \$150,000, JCCF, \$150,000
Job Impact: 4 C, other benefits as well
Date: 2022



Multi-Modal Tourism Transportation Hub at Jamestown’s McCrea Point Project

Sponsor: City of Jamestown/Jamestown Renaissance Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Riverfront Development Property Acquisition Project

Sponsor: City of Jamestown
Total Cost: \$1,400,000; funding source: NYS \$1,400,000
Job impact: TBD
Date: 2022

Traffic Calming/Streetscape Enhancements Project (from 2nd to Fluvana Avenue on Washington Avenue in Jamestown, NY)

Sponsor: City of Jamestown/Jamestown Renaissance Corporation/NYS DOT
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Lister Street (Jamestown) Closure and Rail Siding Installation Project

Sponsor: STERA / City of Jamestown
Total cost: \$663,950; funding sources: NYS DOT (\$168,950), other sources TBD
Job impact: TBD
Date: 2022

Passenger Railroad Feasibility Study and Business Plan Project – WNY Regional Rail Corridor

Sponsor: City of Jamestown
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

City of Jamestown Marketing & Branding Initiative

Sponsor: City of Jamestown
Total cost: \$75,000 plus campaign costs; funding sources: City of Jamestown/JLDC
Job impact: TBD
Date: 2022

Unite North Main Gateway Corridor Implementation

Sponsor: City of Jamestown/ Gebbie Foundation/ BPU/JRC
Total cost: TBD
Job impact: TBD
Date: 2022



Riverwalk Illumination Project

Sponsor: City of Jamestown
Total cost: TBD; funding sources: DRI
Job impact: TBD
Date: 2022

Dunkirk Macaroni Company Redevelopment on Lakeshore Drive

Sponsor: City of Dunkirk
Total Cost: \$4-5 Million; funding sources: Restore NY, DRI
Job Impact: TBD
Date: 2022

First Niagara Bank Redevelopment (401 Central Ave)

Sponsor: City of Dunkirk
Total Cost: \$3 Million; funding sources: TBD: Restore NY, DRI
Job Impact: TBD
Date: 2022

Redevelopment of Former Eiler's Furniture Store (400-402 Central Ave)

Sponsor: City of Dunkirk/CCLB
Job Impact: TBD
Total Cost: \$4-5 Million; Restore NY, DRI, HCR
Date: 2022

Workforce Affordable Housing Project

Sponsor: City of Dunkirk/Regan Development
Job Impact: TBD
Total Cost: 12-14 million. LIHTC from HCR, CDBG, DRI
Date: 2022

Clarion Hotel Rebranding & Room Upgrades

Sponsor: Clarion Hotel/City of Dunkirk
Job Impact: TBD
Total Cost: \$5 Million; DRI
Date: 2022

ZEV Charging Stations

Sponsor: City of Dunkirk
Job Impact: TBD
Total Cost: \$1 Million; funding sources: NYCERDA, NRG
Date: 2022



Passenger Railroad Amtrak Station Feasibility Study and Business Plan Project

Sponsor: City of Dunkirk
Total cost: \$20,000; ARPA City of Dunkirk
Job impact: TBD
Date: 2022

Multi-Modal Transportation Hub (3rd & Main) Amtrak Station

Sponsor: City of Dunkirk
Total cost: TBD /; funding sources: TBD, IIJA, DRI
Job impact: TBD R / 20 C
Date: 2022

Dunkirk Downtown Revitalization Initiative

Sponsor: City of Dunkirk/Chautauqua County
Total Cost: \$10,000,000; funding source: NYSDOS and Private
Job Impact: TBD
Date: 2022

Route 5 Complete Streets Project

Sponsor: City of Dunkirk
Total Cost: \$1,500,000; funding source: NYSDOT, CCPEG, CDBG, and City
Job Impact: TBD
Date: 2022

Central Avenue Façade and Building Improvements Project

Sponsor: City of Dunkirk
Total Cost: \$500,000; funding source: TBD
Job Impact: TBD
Date: 2022

Early Child Care Education

Sponsor: Dunkirk City School District
Total Cost: TBD; funding source: TBD
Job Impact: TBD
Date: 2022

Citywide-Brownfield Assessment Grant (USEPA)

Sponsor: City of Dunkirk
Total cost: \$300,000; USEPA
Job impact: TBD
Date: 2022



Lake Shore Dr. Mixed Use Project

Sponsor: City of Dunkirk
Total Cost: \$2,500,000; funding source: ESD and Private
Job Impact: TBD
Date: 2022

Town-Led and Village-Led Projects

Westfield West Main Water/Sewer Extension Project

Sponsor: Town of Westfield / Village of Westfield
Total cost: Water \$1,195,600 / Sewer TBD; funding sources: TBD
Job impact: TBD R / 20 C
Date: 2022

Westfield Business Park Project

Sponsor: Westfield Development Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

E. Lake Road Water Extension Project

Sponsor: Town of Westfield
Total cost: \$2,500,000; funding sources: TBD
Job impact: TBD
Date: 2022

Westfield Water System Improvements Project

Sponsor: Village of Westfield
Total cost: \$2,378,900; funding sources: TBD
Job impact: TBD R / TBD C
Date: 2022

Welch Field Facilities Upgrade Project

Sponsor: Village of Westfield
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Westfield Train Station Passenger Stop Project

Sponsor: Westfield Development Corporation
Total cost: TBD; sources: TBD
Job impact: 10 - 20 C
Date: 2022



Westfield Main Street Revitalization (A Pathway to a Vibrant Downtown Westfield) – Phase II Project

Sponsor: Chautauqua Opportunities, Inc. / Village of Westfield
Total cost: \$250,000; funding sources: CCPEG, Village
Job impact: TBD
Date: 2022

Westfield Pedestrian Hub and Municipal Parking Lot Upgrade Project

Sponsor: Village of Westfield
Total cost: \$424,925; funding sources: TBD
Job impact: TBD
Date: 2022

Sherman (Village) Wastewater Treatment Plant Upgrade Project

Sponsor: Village of Sherman
Total cost: TBD; funding sources: NYS EFC, other sources TBD
Job impact: TBD
Date: 2022

Lucy Trail Boardwalk Project

Sponsor: Village of Celoron
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Lakewood Hartley Park Improvements

Sponsor: Village of Lakewood/CCIDA/CCPEG
Total cost: \$780,000; funding sources: NYSOPRHP, CCPEG, Village of Lakewood, private funds
Job impact: TBD
Date: 2022

Bemus Point (Village) Casino Renovation Project

Sponsor: Village of Bemus Point
Total cost: \$477,000; funding sources: TBD
Job impact: 25 C / 150 R
Date: 2022

Sunset Golf Course Property Development Infrastructure

Sponsor: Town of Busti/CCPEG
Total cost: TBD
Job impact: TBD
Date: 2022



College Led Projects

Pro Bono Campus Based OT Clinic

Sponsor: Jamestown Community College
Total Cost: \$210,360; funding sources: ARC, \$105,180, JCC, \$105,180
Job Impact: TBD, 20 students trained
Date: 2022

Increased Talent Pipeline for Software Developers

Sponsor: Jamestown Community College
Total Cost: \$325,101.27; funding sources: ARC \$149,996.24, private sector fees \$94,500, applicant \$80,605.03
Job Impact: 1 C
Date: 2021

Hispanic Success Center Project

Sponsor: Jamestown Community College
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

SUNY Fredonia 2021 Project

Sponsor: SUNY Fredonia
Total cost: TBD; funding sources: TBD
Job impact: 373 C
Date: 2021

Other

Chautauqua Institution Master Plan Implementation Project

Sponsor: Chautauqua Institution
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Making It Real: Girls & Manufacturing Project

Sponsor: Dream It Do It WNY
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022



Education and Training Fund Program

Sponsor: UPMC Chautauqua
Total Cost: \$200,000; funding sources: ARC \$100,000, WCA Foundation \$52,500, CRCF \$26,000, applicant \$21,000
Job Impact: 70 C
Date: 2022

Chautauqua County Chamber of Commerce ShopLocalCHQ Program

Sponsor: Chautauqua County Chamber of Commerce/CCIDA/CCPEG
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Jamestown Furniture Mart Redevelopment Project

Sponsor: Gebbie Foundation
Total Cost: \$19,000,000; funding sources: NYS \$1,500,000, state/federal/county historic tax credits/mortgage tax abatements/county sales tax abatements \$2,200,000, private equity \$4,267,600, private debt \$11,000,000
Job impact: 70 created, 350 retained
Date: 2022

Rural Areas Revitalization Project

Sponsor: Chautauqua Opportunities, Inc.
Total cost: \$200,000; funding sources: TBD
Job impact: TBD
Date: 2022

Chautauqua County Education Coalition Project

Sponsor: Chautauqua County Chamber of Commerce / Manufacturers Association of the Southern Tier / Cummins Jamestown Engine Plant / and others
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Gateway Lofts Project

Sponsor: Southern Tier Environments for Living/ Community Helping Hands
Total cost: \$36,000,000; funding sources: DHCR, NYS OMH, SHOP, Federal Historic credits, State Historic credits, Brownfield credits, CIF
Job impact: TBD
Date: 2022



Arcade Building Redevelopment Project

Sponsor: Home Leasing

Total cost: TBD

Job impact: TBD

Date: 2022



Regional Projects

Southern Tier West Good Jobs Challenge Project

Sponsor: Southern Tier West RP&DB
Total cost: TBD; funding sources: EDA, match TBD
Job impact: TBD
Date: 2022

US Route 219 Supplemental EIS Funding Project

Sponsor: NYS DOT
Total cost: \$2,500,000; funding sources: TBD (NYS DOT, US DOT, NYS ESD)
Job impact: TBD
Date: 2022

US Route 219 Construction Project

Sponsor: NYS DOT
Total cost: TBD; funding sources: TBD (NYS DOT, US DOT)
Job impact: TBD
Date: 2023

STEDO Revolving Loan Fund Recapitalization Project

Sponsor: Southern Tier Enterprise Development Organization, Inc.
Total Cost: \$300,000; funding sources: ARC \$150,000, private sector loan recipients \$150,000
Job Impact: 22 C
Date: 2023

STEDO Small Business RLF Capitalization Project

Sponsor: Southern Tier Enterprise Development Organization, Inc.
Total cost: \$10,000,000; funding sources: NYS ESD (\$5,000,000), Local Private (\$5,000,000)
Job impact: 80 C
Date: 2023

Commercial Bio-Refinery Resource Assessment Project

Sponsor: Seneca Trail Resource Conservation & Development
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Food Aggregation Facility Implementation Project

Sponsor: Southern Tier West RP & DB
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022



Dream It Do It Western New York Project

Sponsor: Manufacturers Association of the Southern Tier
Total cost: \$300,000; funding sources: NYS ESD (TBD), foundations (TBD); Private (TBD)
Job impact: TBD
Date: 2022

Rail Siding and Interchange Access Project

Sponsor: Southern Tier Extension Railroad Authority
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

Railroad Rehabilitation Project

Sponsor: Southern Tier Extension Railroad Authority
Total cost: \$15,000,000; funding sources: TBD (EDA, NYS DOT, FRA, Private)
Job impact: 50 C
Date: 2022

Site Development Planning Project Phase 1

Sponsor: Southern Tier West RP & DB
Total cost: TBD; funding sources: TBD
Job impact: N/A
Date: 2022

Transload Facility Project Phase 1

Sponsor: Southern Tier Extension Railroad Authority
Total cost: TBD; funding sources: TBD (EDA, NYS DOT, FRA, Private)
Job impact: 10 + C
Date: 2022



Economic Resilience Projects

All Projects in this list are intended to be undertaken by some combination of County Departments of Planning and Development (in each county), County Industrial Development Agencies (in each county), and/or Southern Tier West; certain projects also may be appropriate for implementation by municipalities. All projects in this section are considered priority projects; as such, their titles are all highlighted in yellow, and all of the projects appear in the Action Plan section of the CEDS.

County-Level Economic Resilience (Disaster Response and Recovery) Planning Project

Sponsor: County P&D, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

GIS Project to Identify Major Employers in Floodplains

Sponsor: County P&D, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Business Risk Assessment Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Agricultural Business Risk Assessment / Information Dissemination Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Business Risk Self-Assessment Web Cookbook Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Surge Capital/Credit Fund Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023



Community Infrastructure/Asset Mitigation Project

Sponsor: Municipalities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023

Utility/Broadband Infrastructure Mitigation Project

Sponsor: Private Utilities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2023



Appendix



Data

Source for all data in this chapter: StatsAmerica.org, 5/31/2022

Regional Demographic Data

| | Region | USA |
|---|---------|-------------|
| Population | 250,638 | 326,569,308 |
| Population Growth since 2010 | -5.5% | 7.4% |
| Population Change 2010 | -14,506 | 22,604,036 |
| Civilian population 18+ | 198,317 | 252,130,477 |
| Growth in Working-Age Population | -7.3% | 5.9% |
| Single Parents w/Kids <18 Living in Poverty | 4,171 | 3,772,357 |
| Veterans | 17,356 | 17,835,456 |

Race & Ethnicity

Race

| | | |
|--|---------|-------------|
| American Indian and Alaska Native | 2,789 | 2,075,852 |
| Asian Alone | 1,702 | 18,184,182 |
| Black or African-American alone | 4,847 | 39,994,653 |
| Native Hawaiian and Other Pacific Islander | 61 | 550,080 |
| White alone | 223,827 | 196,251,375 |
| Two or More Races | 4,986 | 9,134,542 |

Ethnicity

| | | |
|--------------------------|---------|-------------|
| Hispanic or Latino | 12,271 | 59,361,020 |
| Mexican | 1,877 | 36,537,028 |
| Puerto Rican | 234 | 2,332,584 |
| Cuban | 7,731 | 5,699,150 |
| Other Hispanic or Latino | 2,429 | 14,792,258 |
| Not Hispanic or Latino | 238,367 | 267,208,288 |

Health Insurance Coverage

Age

| | | |
|--------------|---------|-------------|
| Under 19 | 52,862 | 73,565,445 |
| 19 to 64 | 132,515 | 169,230,054 |
| 65 and older | 47,403 | 50,670,639 |

Sex

| | | |
|--------|---------|-------------|
| Male | 114,179 | 141,840,285 |
| Female | 118,601 | 151,625,853 |

By Race and Ethnicity

By Race

| | | |
|-----------------------------------|---------|-------------|
| White | 215,375 | 209,497,149 |
| Black | 4,341 | 35,997,073 |
| American Indian and Alaska Native | 2,289 | 2,124,617 |



| | | |
|---|---------|-------------|
| Asian | 1,548 | 17,146,024 |
| Native Hawaiian & Other Pacific Islander | 76 | 532,695 |
| Some Other Race | 3,080 | 13,297,707 |
| Two or More Races | 6,071 | 14,870,873 |
| White Alone, Not Hispanic | 209,100 | 182,027,836 |
| By Ethnicity | | |
| Hispanic or Latino | 11,029 | 48,214,027 |
| Disability Status of Civilian Population | | |
| Under 18 | 3,447 | 3,166,556 |
| 18 to 64 | 19,803 | 20,231,217 |
| 65+ | 16,297 | 17,388,688 |
| Total Noninstitutionalized with a Disability | 39,547 | 40,786,461 |
| Educational Attainment | | |
| Ed Attainment base - pop 25+ | 172,024 | 222,836,834 |
| High School Graduate | 62,116 | 59,421,419 |
| Some College | 31,017 | 45,242,162 |
| Associate Degree | 23,552 | 19,254,254 |
| Bachelor's Degree | 20,426 | 45,034,610 |
| Graduate or Professional Degree | 17,531 | 28,321,709 |
| Housing Units | | |
| Total | 135,713 | 138,432,751 |
| Occupied | 103,652 | 122,354,219 |
| Owned | 74,151 | 78,801,376 |
| Rented | 29,501 | 43,552,843 |
| Vacant | 32,061 | 16,078,532 |
| Seasonal | 20,393 | 5,303,302 |
| Age of Housing Stock | | |
| 2010 or Later | 3,111 | 8,598,574 |
| 2000-2009 | 8,190 | 18,872,283 |
| 1970 to 2000 | 39,620 | 58,525,224 |
| 1950 to 1969 | 26,447 | 28,593,770 |
| Before 1950 | 58,345 | 23,842,900 |



Demographic Data – Individual Counties plus New York State

| | <u>Allegany County</u> | <u>Cattaraugus County</u> | <u>Chautauqua County</u> | <u>New York State</u> |
|--|----------------------------|-------------------------------|------------------------------|---------------------------|
| Population Over Time | | | | |
| Population in 2021 | 46,106 | 76,426 | 126,807 | 19,835,913 |
| Population in 2010 | 48,946 | 80,317 | 134,905 | 19,378,102 |
| Population in 2000 | 49,833 | 83,924 | 139,581 | 18,996,959 |
| Population in 1990 | 50,539 | 84,470 | 141,982 | 18,002,855 |
| Population in 1980 | 51,742 | 85,697 | 146,925 | 17,558,165 |
| Population change, 2000 to 2010 | -1.8% | -4.3% | -3.4% | 2.0% |
| Population change, 1990 to 2010 | -3.2% | -4.9% | -5.0% | 7.6% |
| Population change, 1980 to 2010 | -5.4% | -6.3% | -8.2% | 10.4% |
| Net Domestic Migration | -156 | -298 | -231 | -352,185 |
| Net International Migration | 6 | 3 | 26 | 18,307 |
| Natural Increase (births minus deaths) | -125 | -199 | -434 | 18,503 |
| Births | 453 | 790 | 1,257 | 210,640 |
| Deaths | 578 | 989 | 1,691 | 192,137 |

Population Estimates by Age in 2021

| | | | | |
|------------------------|--------|--------|--------|-----------|
| Preschool (0 to 4) | 2,353 | 4,388 | 6,968 | 1,140,669 |
| School Age (5 to 17) | 6,863 | 12,671 | 19,022 | 2,930,473 |
| College Age (18 to 24) | 7,182 | 6,966 | 12,201 | 1,794,550 |
| Young Adult (25 to 44) | 9,259 | 16,624 | 28,491 | 5,294,315 |
| Older Adult (45 to 64) | 11,921 | 21,355 | 35,255 | 5,133,140 |
| Older (65 plus) | 8,726 | 14,746 | 25,647 | 3,221,702 |
| Median Age | 39.3 | 42.5 | 42.8 | 39.0 |

Population Estimates by Race and Hispanic Origin in 2021

| | | | | |
|---|--------|--------|---------|------------|
| American Ind. or Alaskan Native Alone | 101 | 2,462 | 332 | 76,535 |
| Asian Alone | 484 | 541 | 679 | 1,674,216 |
| Black Alone | 757 | 1,147 | 3,437 | 3,002,401 |
| Native Hawaiian and Other Pac. Isl. Alone | 26 | 0 | 59 | 9,376 |
| White Alone | 44,175 | 70,260 | 116,046 | 12,160,045 |
| Two or More Race Groups | 619 | 1,882 | 3,836 | 921,553 |
| Non-Hispanic or Latino | 45,522 | 75,078 | 117,767 | 15,794,142 |
| Hispanic or Latino | 782 | 1,672 | 9,817 | 3,720,707 |



Hispanic or Latino Population in 2021

| | | | | |
|---|--------|--------|---------|------------|
| Puerto Rican | 117 | 828 | 6,786 | 1,078,084 |
| Other | 440 | 312 | 1,677 | 2,099,857 |
| White, Not Hispanic (reporting white alone) | 43,664 | 69,202 | 110,961 | 10,766,297 |
| Hispanic | 782 | 1,672 | 9,817 | 3,720,707 |
| Mexican | 187 | 497 | 1,193 | 464,480 |
| Cuban | 38 | 35 | 161 | 78,286 |

Households in 2020

| | | | | |
|--------------------------|--------|--------|--------|-----------|
| Total Households | 18,028 | 31,999 | 53,625 | 7,417,224 |
| Family Households | 11,553 | 20,244 | 32,567 | 4,670,153 |
| Married with Children | 3,207 | 4,945 | 7,752 | 1,282,898 |
| Married without Children | 5,913 | 9,736 | 16,099 | 1,977,000 |
| Single Parents | 1,436 | 3,030 | 4,826 | 616,846 |
| Other | 997 | 2,533 | 3,890 | 793,409 |
| Non-Family Households | 6,475 | 11,755 | 21,058 | 2,747,071 |
| Living Alone | 5,339 | 9,772 | 17,490 | 2,208,809 |
| Average Household Size | 2.3 | 2.3 | 2.2 | 2.5 |

Housing Units in 2020

| | | | | |
|------------------------------------|--------|--------|--------|-----------|
| Total Housing Units (ACS estimate) | 26,376 | 41,681 | 67,656 | 8,362,971 |
| Occupied | 18,028 | 31,999 | 53,625 | 7,417,224 |
| Owner Occupied | 14,266 | 23,090 | 36,795 | 4,014,516 |
| Renter Occupied | 3,762 | 8,909 | 16,830 | 3,402,708 |
| Vacant | 8,348 | 9,682 | 14,031 | 945,747 |
| For Seasonal or Recreational Use | 6,034 | 5,905 | 8,454 | 344,593 |

Residential Building Permits in 2021

| | | | | |
|------------------------|----|-----|----|--------|
| Total Permits Filed | 34 | 128 | 88 | 40,135 |
| Single Family | 34 | 112 | 88 | 11,099 |
| Two Family | 0 | 2 | 0 | 908 |
| Three and Four Family | 0 | 0 | 0 | 618 |
| Five Families and More | 0 | 14 | 0 | 27,510 |



Economic Data

| | | |
|-------------------|---------------|------------|
| | Region | USA |
| Per Capita Income | \$44,476 | \$59,510 |

Source: US Bureau of Economic Analysis

| | <u>Allegany County</u> | <u>Cattaraugus County</u> | <u>Chautauqua County</u> | <u>New York State</u> |
|---|------------------------|---------------------------|--------------------------|-----------------------|
| Overview | | | | |
| Total Population 2021 | 46,106 | 76,426 | 126,807 | 19,835,913 |
| Population Growth or Decline 2010 to 2021 | -5.8% | -4.8% | -6.0% | 2.4% |
| Households 2020 | 18,028 | 31,999 | 53,625 | 7,417,224 |
| Labor Force (persons) Ann. Avg. 2021 | 19,042 | 32,847 | 52,786 | 9,441,458 |
| Unemployment Rate Ann. Avg. 2021 | 5.0 | 5.3 | 5.6 | 6.9 |
| Per Capita Personal Income 2020 | \$40,840 | \$45,200 | \$45,357 | \$74,472 |
| Median Household Income 2019 | \$49,411 | \$50,783 | \$50,143 | \$72,038 |
| Poverty Rate 2019 | 17.9 | 14.7 | 16.3 | 13.1 |
| High School Diploma or More - Pct. of Adults 25+ 2020 | 91.7% | 89.7% | 89.4% | 87.2% |
| Bachelor's Degree or More - Pct. of Adults 25+ 2020 | 22.9% | 19.9% | 23.1% | 37.5% |
| Covered Employment 2020 | 12,218 | 26,100 | 43,620 | 8,585,181 |
| Avg Wage per Job 2020 | \$42,855 | \$44,631 | \$44,783 | \$83,122 |
| Manufacturing - Pct. All Jobs in County 2020 | 11.9% | 10.9% | 18.6% | 4.7% |
| Manufacturing - Avg Wage per Job 2020 | \$60,602 | \$66,293 | \$59,344 | \$73,103 |
| Transportation and Warehousing - Pct. All Jobs in County 2020 | 1.9% | 2.1% | 2.7% | 4.1% |
| Transportation and Warehousing - Avg Wage per Job 2020 | \$46,664 | \$42,505 | \$45,848 | \$61,661 |
| Health Care, Social Assist. - Pct. All Jobs in County 2020 | 11.8% | 0.0% | 15.8% | 19.3% |
| Health Care, Social Assist. - Avg Wage per Job 2020 | \$35,799 | \$84,826 | \$43,296 | \$58,008 |
| Finance and Insurance - Pct. All Jobs in County 2020 | 1.5% | 2.5% | 1.7% | 6.0% |



| | | | | |
|---|----------|----------|----------|-----------|
| Finance and Insurance - Avg Wage per Job 2020 | \$58,044 | \$69,432 | \$57,785 | \$252,316 |
|---|----------|----------|----------|-----------|

Median Income

| | | | | |
|------------------------------|----------|----------|----------|----------|
| Median Household Income 2019 | \$49,411 | \$50,783 | \$50,143 | \$72,038 |
| Median Household Income 2000 | \$32,876 | \$34,673 | \$34,422 | \$41,763 |
| Percent Change 2000 to 2019 | 50.3% | 46.5% | 45.7% | 72.5% |

Per Capita Personal Income (PCPI)

| | | | | |
|---------------------|----------|----------|----------|----------|
| 2020 | \$40,840 | \$45,200 | \$45,357 | \$74,472 |
| 2010 | \$28,333 | \$33,290 | \$31,392 | \$48,818 |
| 2000 | \$19,910 | \$22,019 | \$22,137 | \$36,028 |
| 1990 | \$13,610 | \$14,930 | \$15,732 | \$23,990 |
| 10-Year pct. Change | 44.1% | 35.8% | 44.5% | 52.6% |
| 20-Year pct. Change | 105.1% | 105.3% | 104.9% | 106.7% |
| 30-Year pct. Change | 200.1% | 202.7% | 188.3% | 210.4% |

Personal Income in 2020 (\$000)

| | | | | |
|--|-------------|-------------|-------------|-----------------|
| Total Earnings by Place of Work | \$914,114 | \$1,867,802 | \$3,077,893 | \$1,029,283,341 |
| Minus: Contributions for Government Social Insurance | \$104,539 | \$217,252 | \$364,899 | \$106,200,634 |
| Personal Contributions for Government Social Insurance | \$58,366 | \$116,900 | \$194,240 | \$55,987,873 |
| Employer Contributions for Government Social Insurance | \$46,173 | \$100,352 | \$170,659 | \$50,212,761 |
| Plus: Adjustment for Residence | \$128,571 | \$95,760 | \$187,451 | (\$80,716,743) |
| Net Earnings by Place of Residence | \$938,146 | \$1,746,310 | \$2,900,445 | \$842,365,964 |
| Plus: Dividends, Rent, Interest | \$233,589 | \$432,764 | \$695,696 | \$274,799,178 |
| Plus: Transfer Payments | \$690,032 | \$1,249,900 | \$2,120,240 | \$322,884,344 |
| Equals: Personal Income by Place of Residence | \$1,861,767 | \$3,428,974 | \$5,716,381 | \$1,440,049,486 |

Poverty Estimates

| | | | | |
|--|------|------|------|------|
| Poverty Rate in 2019 | 17.9 | 14.7 | 16.3 | 13.1 |
| Poverty Rate for Children under 18 in 2019 | 26.8 | 21.5 | 24.4 | 18.2 |

**Labor Force Annual Averages in Ann. Avg. 2021**

| | | | | |
|---------------------------------------|--------|--------|--------|-----------|
| Total Labor Force | 19,042 | 32,847 | 52,786 | 9,441,458 |
| Labor Force 5-Year Percentage Change | -5.1% | -5.8% | -6.0% | -0.9% |
| Labor Force 10-Year Percentage Change | -19.6% | -14.9% | -14.5% | -1.0% |
| Employed | 18,098 | 31,107 | 49,847 | 8,786,280 |
| Employed 5-Year Percentage Change | -3.6% | -5.0% | -5.7% | -3.1% |
| Employed 10-Year Percentage Change | -16.1% | -11.0% | -12.0% | 0.5% |
| Unemployed | 944 | 1,740 | 2,939 | 655,178 |
| Unemployed 5-Year Percentage Change | -26.8% | -17.9% | -11.3% | 41.2% |
| Unemployed 10-Year Percentage Change | -55.7% | -52.2% | -42.3% | -17.7% |
| Unemployment Rate | 5.0 | 5.3 | 5.6 | 6.9 |
| Unemployment Rate 5-Year Pct. Chg | -21.9% | -13.1% | -5.1% | 40.8% |
| Unemployment Rate 10-Year Pct. Chg | -44.4% | -43.6% | -31.7% | -16.9% |

Educational Attainment in 2020

| | | | | |
|--|--------|--------|--------|------------|
| Total Population 25 and Older | 29,906 | 52,725 | 89,393 | 13,649,157 |
| Less than 9th Grade | 932 | 1,850 | 3,255 | 820,567 |
| 9th to 12th, No Diploma | 1,551 | 3,594 | 6,200 | 923,323 |
| High School Graduate (includes equiv.) | 10,573 | 20,642 | 30,901 | 3,474,389 |
| Some College, No Degree | 5,776 | 9,017 | 16,224 | 2,109,389 |
| Associate Degree | 4,230 | 7,126 | 12,196 | 1,208,697 |
| Bachelor's Degree | 3,529 | 5,288 | 11,609 | 2,854,930 |
| Graduate, Professional or Doctorate Degree | 3,315 | 5,208 | 9,008 | 2,257,862 |



Summary Background

This chapter describes the current economic development situation of the Southern Tier West region of New York State (Chautauqua, Cattaraugus, and Allegany Counties).

Population

- Decreasing **population** in all three counties and major metro communities, in contrast to increasing State and national population.
- Ongoing **outmigration** of population, including especially the young, working-age segment of the population, the high-skill white collar/professional worker segment of the population, and the college graduate segment of the population. Residents are leaving primarily in search of employment elsewhere. The loss of manufacturing jobs also is causing skilled manufacturing workers and even lower skilled workers to leave.
- Ongoing **aging** of the region's population / increasing dependent population (particularly the 65+ age cohort) as a percentage of total regional population. Results include a smaller labor force, a growing public assistance burden, and a less attractive economic development environment.
- Ongoing increase in both **racial diversity** and **diversity of origin**.

Labor Force

- A long term decrease in the regional **labor force size**, especially since 2010, in contrast to increasing State and national labor forces. The pandemic also created a significant decrease in the size of the region's labor force. There has been some recovery in the size of the labor force from the pandemic-related downsizing, but the long term decrease is still the prevailing statistic.
- Ongoing **aging of the labor force**. As aging workers retire, it will be difficult to replace them in terms of experience, overall productivity, and working culture.
- High relative levels of attainment of high school **education** and associate's degree are positives. The low incidence of bachelor's degree or advanced degree presents an obstacle to attracting employers requiring a higher-skill labor force to the region.
- A **labor supply surplus** of unutilized and underutilized workers and a **productive work force** with a good work ethic.
- **Shortages of skilled labor** in specific occupations and skills sets (manufacturing and trades sector skills, computer skills, advanced manufacturing/STEM skills, soft skills).

Employment / Unemployment

- **Long term:** Since 2000, **regional employment** has been decreasing, in contrast to increasing employment at the State and national levels (exception: in addition to regional



employment levels, both the State and national employment levels also decreased due to the pandemic).

- **Short term:**

- **Pandemic impact:** Between 2019 and 2020, **regional employment** decreased significantly, with Chautauqua County experiencing the most job losses and Allegany County the least. (There is some inconsistency between data sources.)

Also, between 2019 and 2020, **regional unemployment** decreased significantly, as did the **size of the labor force** in all three counties. (Again, there is some inconsistency between data sources, with the NYS Department of Labor indicating that Allegany County experienced an increase in the size of its labor force.)

- **Recovery:** However, in 2021 and 2022 there has been some improvement, although the data is mixed.

In 2021, regional employment was either flat or decreasing in the three counties, as compared with 2020. However, there was a significant decrease in the number of persons unemployed in each of the three counties in 2021, as compared with 2020, suggesting that regional residents might have been moving out of the regional labor force. However, each county's labor force was only slightly smaller in size in 2021 than it was in 2020, which does not explain the changes in employment and unemployment numbers.

There seems to be some general level of recovery in 2022, using unadjusted data. In 2022, regional unemployment rates have continued to decrease in all three counties. The size of the labor force increased in Allegany and Cattaraugus County, but decreased in Chautauqua County. In all three counties, employment is increasing and unemployment is decreasing.

- The region's **unemployment rate** often has exceeded the unemployment rate of both the State and nation. This often has been the case until the pandemic in 2020. In 2020 and 2021, the region's unemployment rate was less than both the State and nation, suggesting the region's economy was somehow somewhat insulated from the pandemic downturn to an extent, although unemployment rates did rise across the region. This has continued into 2022, as measured by unadjusted unemployment rates. Of course, one reason for this relative improvement in comparison to the State and nation perhaps is that the region's labor force has decreased by so much that the unemployed no longer are part of the labor force and do not count when the unemployment rate is calculated.
- The region has a significant amount of **under-employed** labor force due to job dislocations and the regional economy's shift away from high-skilled, high-wage manufacturing jobs.
- Using NYS DOL cluster definitions, the most significant **regional employment sectors** as of 2020 are Government; Education and Health Services; Trade, Transportation and Utilities; and Manufacturing. Using IRBC cluster definitions, the most significant regional employment sectors as of 2020 are Local Education and Training; Local Health Services; Government; .Local Hospitality Establishments; and Local real Estate, Construction, and



Development. However, BEA data served via statsamerica.org designates different significant industry and occupation clusters. This industry and occupation cluster data is presented in a later chapter of this Appendix.

Income Levels

- Historically, **per capita personal income** in the region's counties has been uniformly lower than State and national per capita personal income levels. Adjusted (i.e., real dollar) per capita personal income continues to be around two-thirds to three quarters of the national rate. However, in recent year, per capita personal income as a percentage of state and national per capita personal income has deteriorated significantly.
- **Median household income** has been decreasing. **Average sectoral wage levels** historically are lower than analogous average sectoral wage levels in other parts of the State. The region's individual and family **poverty rates** are above State and national levels and increasing. The region also is experiencing relatively high **public assistance and income assistance burdens**.

Natural Environmental Assets and Issues Profile

- **Good environment quality**, but facing threats including air, soil, and water **contamination**.
- The region's physical **environmental assets** that provide economic opportunity include outdoor recreational assets; climate, arable soils, and land available for cultivation; water resources; timber resources; and oil, gas, gravel, and mineral resources. The region's **primary land uses** include forest/woodland and agriculture. There also is an opportunity for increased development of specific appropriately managed eco-tourism opportunities.
- **Actual or potential threats** to the ongoing availability of physical environmental assets and resources, from both quality of life and economic development perspectives, include pollution (example: Chautauqua Lake), sprawl, overutilization, and inappropriate utilization.
- The region's short growing season can constrain or prohibit certain types of **agricultural crop production**. However, certain crops are economically feasible to cultivate, and certain types of agricultural sector activity, e.g., livestock and timber, thrive in the region's climate. Winters can be harsh, negatively impacting transportation and increasing heating and business operating costs.
- The region is located within a day's travel of large northeastern metropolitan areas, placing the region in **proximity to a large domestic market**. However, transportation to the extra-regional domestic market still is required, which takes time and imposes additional costs when compared with competing businesses located within larger metropolitan areas. Additionally, the distance from urban areas in the past has contributed to difficulties in attracting certain types of skilled labor. The proximity of the region to the larger Buffalo metro economy exerts significant impact on the region's economy.



Built Environment Assets (i.e., infrastructure and other man-made assets) and Issues

- Most of the region’s population centers (cities and villages) are served by some combination of water, sewer, telecommunications/broadband, natural gas, electricity, steam, transportation modes, etc. Certain communities have issues with utility **infrastructure service capacity** and maintenance, which in some instance can constrain business development. Attention also is being given to water source quality protection.
- **Telecommunications and broadband infrastructure** are significant and essential drivers of economic development in the region and also with respect to improving and maintaining global competitiveness. There are deficiencies in the regional broadband infrastructure and service levels. The region is making strides toward addressing these deficiencies.
- **Electricity** is available throughout the region, but **natural gas** service is not available in the more rural areas of the region. New York State’s energy costs historically have exceeded those of other states.
- The region’s distance from metropolitan centers, primary passenger airports, and global ports requires an efficient and high quality inter-regional **passenger and freight transportation system**. The region’s large geographic size and low population density also requires an efficient intra-regional passenger and freight transportation system. The region is served by two interstate highways, a network of federal, state and local highways, two Class 1 rail lines and three short line rail lines, one airport with scheduled passenger service, several general aviation airports, and an evolving mobility management (public transportation) infrastructure. There have been ongoing improvements to the region’s highway, freight railroad, air, and mobility management infrastructure; continuing deficiencies need to be addressed through appropriate planning and investment, so as to effectively serve residents and the existing institutional and business communities, and to catalyze additional economic development. Additionally, the ongoing expense of transportation system maintenance is an issue.
- Educated and skilled people and high-growth companies are mobile and can locate virtually anywhere. Other things equal (e.g., economic opportunity, presence of family, access to cultural amenities, etc.), they often choose to locate in regions that value **connected, safe, convenient and healthy places to live, work, and do business**. Connectivity requires **basic infrastructure** (e.g., strategic transportation links and information technology connections), but it also requires networks among people, that is, “**civic spaces**” in both the physical environment sense and the non-physical environment sense (e.g., networks, etc.). There is an opportunity in the region for additional development of both enhanced connective infrastructure and networks.
- Many communities in the region have **downtown centers** that continue to be idyllic small town environments for living and working. However, many communities are experiencing threats to their downtown business districts, including urban sprawl and the migration of downtown retail and service business out of downtown business districts, the entry of “big box” and other non-locally owned competitors into local marketplace, and online commerce. Consistent with **smart growth principles**, the region needs to concentrate



economic and community development initiatives toward preserving and enhancing the vitality and centrality of these downtown centers.

- There has been a trend toward **increased levels of planning** at the community and county level in recent years. This process is extremely important, as it creates a shared local consensus about direction and strategies and can provide a list of priority strategic initiatives for achieving the goals of the comprehensive plan. Certain communities and counties also are beginning to develop strategic economic development plans.
- The region's **crime rate** is low relative to that of more urban areas. However, there are **public safety concerns**, due to higher levels of drug use and associated crime, and higher incidence of gang activity. Racial tensions may prove to be problematic in the region, as they have in other regions. There are occasions of issues related to school safety and gun violence in the region.
- The region has a more stable **housing** market than the State and nation as a whole, and a higher incidence of owner-occupied housing. However, some factors indicating some weakness in the region's housing market include median housing prices that are significantly lower than State and national median housing prices, a historically slower relative housing turnover rate, an aging housing stock (older than State and national housing stocks), and lower relative new housing construction rates. Also, many residents spend more than 35%+ of their income on housing costs.
- Regional residents typically have access to high quality **health care**, either within the region or by traveling to larger municipalities outside the region. However, a number of the region's more rural communities are underserved by comprehensive health care services. Certain health care institutions in the region face ongoing challenges to their viability and competitiveness in response to the dynamics of technology advances and insurance and regulatory environments. In certain areas, there are shortages of certain health care providers, e.g., doctors, nurses, and specialists. Health care costs increasingly are a burden to regional employers and residents. There remain significant local opportunities for improving health care access across the region. A continuing issue is the lack of health care insurance by a percentage of the region's population.
- Improvements are needed with respect to **educational performance** at the primary and secondary levels, and with respect to preparing residents for current and future jobs. There is room for increased emphasis on **STEAM education and entrepreneurial education**. The region also should encourage obtaining post-secondary **bachelors and advanced degrees** to improve the workforce. Certain of the region's post-secondary institutions are **centers of technology research** (e.g., ceramics, advanced materials, etc.), which could lead to business development through technology transfer and thorough preparation of the future labor force for jobs in technology-based businesses and in sectors that will or at least may develop from emerging technologies. This is a significant opportunity for sustainable economic development.
- The region has a significant number of **recreational and cultural assets** that contribute both to quality of life and economic development, but also has underutilized these assets.



- The region has significant **historical and cultural assets**. Historic preservation and investment in these assets will encourage tourism-based economic development.
- Overall, the region enjoys a positive and attractive **quality of life**, with an attractive small-town rural lifestyle, engaging cultural and recreational resources, low-crime rates, a relatively clean environment, stable housing markets, and relatively high-quality health care. However, as a consequence of the ongoing structural changes that the region is experiencing, certain cornerstone institutions (e.g., hospitals, schools, and other community institutions) face threats from decreases in population and standard of living.
- **Sprawl** growth is an issue. The region must embrace **smart growth principles** to limit sprawl.
- It is to our region's advantage to identify sources of extra-regional supply chain leakages and attempt to promote fulfillment of **supply chains** from internal regional sources to the extent possible. The greatest impact will result from working with **regionally significant industry clusters**.
- New York State remains a relatively high-cost **business operating environment**. The most commonly heard complaints relate to taxes, workman's compensation, and environmental regulations. At the local level, local laws or circumstances that are impediments to business operations should be attempted to be resolved.
- There is an ongoing need for increased availability of **private and public equity and debt capital** to support entrepreneurship and business development in the region. The **financial wherewithal of municipalities** to repay new debt financing historically has constrained many municipalities from undertaking community and economic development projects.
- **Global competition** and **general macroeconomic conditions** have negatively impacted the region's economy in both the longer and shorter terms, resulting in job losses, business closures, and increased absentee business ownership. **Non-local business ownership** can result in a lower degree of corporate commitment to maintaining local business operations within the region.

Emerging or Declining Clusters / Industry Sectors

- The region has been undergoing a **transformation** from an economy featuring many high-skill, high-wage unionized jobs to an economy that features an increasing number of relatively low-skill, low-wage service and commercial employment, often part-time in nature and offering few benefits, such as health insurance and retirement benefits.

The region's manufacturing sector is experiencing an ongoing employment decline. There has been significant outsourcing of manufacturing production and jobs both domestically and overseas, especially by non-locally-owned businesses. Since manufacturing is a primary **value-added sector, with regional exports bringing new wealth into the region**, a decline in this sector erodes the region's standard of living.

The growing services and trade sector often features jobs that are part time or seasonal jobs with no benefits, eroding incomes. Further, much of the region's services and trade



sector does not involve regional export activity, and thus does not bring new wealth into the region.

- The **region’s most significant industry clusters** are Tobacco, Production Technology and Heavy Machinery, Downstream Metal Products, Upstream Metal Manufacturing, Food Processing and Manufacturing, Livestock Farming, Furniture, Leather and Related Products, and Lighting and Electrical Equipment. These clusters are clusters with location quotients greater than 1.0. The counties also consider the tourism sector to be a significant economic cluster. These industry clusters represent very significant competitive advantage assets (i.e., target clusters) for economic development. See the Appendix chapter “Strategic Target Clusters” for further exposition of this topic.

Based exclusively on employment size, the following industry clusters, listed in descending order of employment levels, would seem to be appropriate targets for economic development efforts: Production Technology and Heavy Machinery, Food Processing and Manufacturing, Downstream Metal Products, Furniture, Upstream Metal Manufacturing, Livestock Farming, and Lighting and Electrical Equipment.

- The **region’s most significant occupation clusters**, listed in descending order of employment levels, are Food Preparation and Service, Primary/Secondary/Vocational Education, Remediation and Social Services, Attendants and General Services, Health Care (Therapists, Technicians and Aides), Managers and First-line Supervisors, Sales/Agents/Brokers and Customer Relations/Support, Transportation/Logistics/Dispatch/Support, Financial/Legal and Inspection Services/Support, Administration and Office Support, Mechanics and Repair Technicians, Managerial/Sales/Marketing and Human Resources, Health Care (Nurses and Specialized Care Delivery), and Transportation Equipment Operators. See the Appendix chapter “Strategic Target Clusters” for further exposition of this topic.
- **The region should develop strategic initiatives to improve the regional workforce’s knowledge and technology skills, and also develop initiatives that focus on occupational cluster strengths, particularly where there are strong industry clusters as well.**

A **cluster-based economic development strategy** would direct resources to the vertically and horizontally integrated cluster, building networks, strengthening individual firms and supply chains, and improving the cluster-specific labor force. The approach should include developing communication and consensus between industry cluster members, the economic development community, and the educational and job training community; the facilitation of technology adoption and improvements by the cluster; and the enhancement of labor force skills.

Innovation Assets

- The region has a lower **capacity to innovate** (“Innovation Index”) than the state and nation as a whole, meaning that the region is less prepared and capable to generate innovation-based economic development, which is essential for a healthy economy over the long-term.



This is manifested in inadequate levels of entrepreneurship, technology transfer and adoption, and export activity.

- **Human capital (labor force) innovation shortcomings** include a low incidence of bachelor's degrees amongst the region's residents, a significantly higher rate of decrease in the region's population of younger working age persons (ages 25 to 44), a lower percentage representation of high-tech employees in the employment base, and a lower tech-based knowledge occupation cluster employment share.

Economic asset innovation shortcomings include the unavailability and/or lack of use of venture capital for business ventures in the region, low broadband penetration rates, low rates of establishment churn in the region, a lower incidence of small-sized businesses establishments as compared to the state, and a higher incidence of large establishments as compared to the state.

- The region does have certain **significant assets** (e.g., colleges, incubators, manufacturer's associations, consulting organizations, etc.) **that could catalyze innovation**, and certain specific ongoing and proposed initiatives in the region (e.g., productivity, entrepreneurship, workforce development, incubators, industrial parks, and technology transfer and commercialization centers) that are intended to enhance innovation rates.



SWOT Analysis

SWOT is an acronym for Strengths, Weaknesses, Opportunities, and Threats. EDA encourages regions to create the strategic content of their CEDS (i.e., economic development goals, objectives, strategies, and projects) based upon a SWOT Analysis. The following is the regional view of the Southern Tier West region's economy's strengths and weaknesses, and the economic opportunities and threats that the region faces. Each of the four SWOT elements are subdivided into five sub-categories: (1) human capital, (2) traditional and non-traditional infrastructure, (3) innovation and entrepreneurship, (4) quality, connected places, and (5) collaborative leadership.

Regional Strengths

1. Human Capital:

- **Presence of a labor force with certain skills**
- **Presence of a high productivity labor force, including workforce quality and workplace practices**
- **Educational attainment**
- **Education and employee training system**
- **Slowing outmigration rate**

2. Traditional and Non-Traditional Infrastructure

- **Strategic location of the region**
- **Transportation infrastructure**
- **Information and communication technologies (broadband, wireless)**
- **Significant natural resource base and physical development assets**
 - Farmland and agricultural resources (climate, soils, and topography)
 - Forest assets
 - Water resources:
 - Marcellus and Utica shale gas resources
 - Solar energy resources
 - Geothermal energy resources
 - Wind energy resources
 - Biomass / Biofuels resources
 - Lake Erie coastland asset
- **Tourism assets**
- **Significant manufacturing base**
- **Significant industry clusters**
- **Significant occupation clusters**
- **Growth sectors (education and health services sector, the professional and business services sector, the leisure and hospitality sector, and other services)**
- **Diversification of industry sectors**



- **Business acumen**
- **Technical / technology acumen and resources**
- **Global linkages**
- **Significant support of economic development by local foundations**
- **Presence of the Seneca Nation of Indians**

3. Innovation and Entrepreneurship

- **Entrepreneurial capacity**
 - Non-technical business assistance providers (e.g., business planning assistance, etc.)
 - Business incubators
 - Business development programs
- **Innovation**
 - Research and development enterprises
 - Productivity enhancement programs and assistance

4. Quality, Connected Places

- **Livable, walkable, smaller communities**
- **Low crime rates**
- **Affordable cost of living**
- **Clean environment**
- **Recreational and tourism assets**
- **Cultural assets**
- **Historic assets**

5. Collaborative Leadership

- **Willingness to collaborate and rationally seek solutions to problems and achieving goals**
- **increased level of collaboration and services and equipment sharing amongst municipalities in the region**
- **Many community and industrial leaders have a strong "pride of place" commitment to region**
- **Amenability to transformational change**
- **Indications of willingness to consider proactive investment in economic development**
- **Ongoing commitment to strategic planning and the county and municipal level**

Regional Weaknesses

1. Human Capital

- **Structural population and labor force changes**
 - Population loss
 - Aging of the population
 - Outmigration of the population, especially the younger demographic
 - Smaller, less skilled regional labor force.



- **Inadequate regional educational attainment**
 - High level of attainment on individuals with associate's degrees
 - Too high a percentage of individuals with a high school diploma or less
 - Too few individuals with bachelor's or advanced degrees
- **Inadequate supply of a highly skilled, technically trained workforce in many job titles.**
- **Labor force productivity issues**
- **Low per capita income and high poverty rate**

2. Traditional and Non-Traditional Infrastructure

- **Physical infrastructure constraints to development**
 - Lack of service in rural areas
 - Aging systems / costly to maintain
 - Capacity issues
 - Cost of service
- **Capital market constraints to development**
 - Private equity capital (both entrepreneurial capital and venture capital)
 - Private debt capital
 - Public debt and equity capital
- **Inadequate global linkages**
 - Need for more private sector connection to global economy
 - Less-than-optimal rates of collaboration and participation of regional businesses with the region's university community with respect to export activities
 - Less-than-optimal participation of the foreign world at large with the region's universities and colleges with respect to research and business development activities

3. Innovation and Entrepreneurship

- **Inadequate regional innovation capacity and activity**
 - Inadequate research and development enterprise capacity
 - Inadequate technology commercialization competence and activity
 - Inadequate innovation culture
 - Inadequate networking opportunities
- **Inadequate regional entrepreneurial capacity**
- **Barriers to entry**
- **Productivity and competitiveness issues**

4. Quality, Connected Places

- **Quality of life forces and issues**
 - Need to **preserve and reinvigorate main streets and downtown business centers** (Community Centers) to avoid sprawl, improve quality of life, and reduce the cost of service provision. Includes:
 - Redevelopment and repair of downtowns
 - Enhanced commercial and services provision
 - Increased availability of housing stock in downtowns



- Address high commercial vacancy rates in downtowns
- Create and improve creative districts within communities
- Increase amenities within communities
- Increase the walkability of communities
- Increase the relationship within communities of the built environment and the natural environment (e.g., public parks space and green space, trails, etc.)
- Need to **improve many community institutions**, including hospitals/emergency care facilities, schools, fire departments, community buildings, religious organizations, housing and housing organizations, social service organizations, libraries, parks, cultural institutions (e.g., museums and community arts centers), community foundations and other locally-focused philanthropies, volunteer associations, cooperatives, primary private sector businesses (e.g., groceries, pharmacies, gas stations, etc.), man-made and natural recreational assets, and even virtual organizations and networks
- Need to **further develop the region’s recreational infrastructure and make older communities walkable** to facilitate healthy activities and lifestyles
- Need to increase public and private **support for the region’s cultural assets and cultural life**
- Need to **improve housing and building stock**, including:
 - Addressing Increasing housing and building stock age
 - Increasing new housing and building stock construction rates
 - Addressing substandard and non-code-compliant housing
 - Increase variety of alternative types of housing options
 - Address the Increasing prevalence of manufactured and/or mobile housing
 - Address the increasing conversion of large homes to apartments
 - Address housing stock affordability issues
 - Address absentee ownership of rental properties
 - Address the need for architectural preservation
 - Increase the rate of adaptive reuse
- Need to promote **energy conservation improvements**
- Need to **improve public education** through investment and, in some cases, consolidation and sharing
- Need to **improve health care** throughout the region, including
 - Improving health care outcomes throughout the region (e.g., high teen pregnancy and smoking rates, chronic disease, and childhood and adult obesity)
 - Need to transition from a disease management focus to a prevention focus
 - Address obstacles to recruitment and retention of doctors and other health care workers
 - Address access issues in smaller communities (e.g., access to hospitals, emergency care facilities, specialist, and even local doctors)
 - Need for improved transportation options to help people travel to appointments
 - Address the shortage of funds to improve aging and out-of-date hospitals and nursing homes



- **Marcellus and Utica shale gas extraction** may prove problematic to local/regional water quality
- **Overuse or inappropriate land development and certain business practices** may threaten the carrying capacity of the natural environment
- Need for **conservation of natural resources and agricultural lands**
- **Social capital** (the resources of the “social infrastructure” of community organizations and volunteer groups engaged in activities to benefit the community) may be becoming stretched
- **Negative and divisive community attitudes** - political, geographic, ethnic, racial, attitudes toward government and business communities, public apathy, etc.
- **Other Structural Forces and Issues**
 - **Coronavirus pandemic economic downturn**, leading to business downsizing/suspensions/closures, and ultimately layoffs
 - Burdensome **business climate** - corporate and personal income tax burdens, regulatory and compliance requirements, workman’s compensation burdens, utility costs, winter heating costs, high transportation costs, rising health care costs, etc.
 - **State and local government issues**, including:
 - Too many layers of government
 - Need to reduce/consolidate/share services
 - Inadequate government service delivery, in part a function of a shortage of local government financial resources and staff capacity
 - Governmental operating costs, including rising health care costs, State pension fund costs, etc.
 - Unfunded State mandates
 - Regulatory and compliance requirements
 - Slow rates of government innovation and adoption of technology
 - Inadequate level of collaboration in the region between government and other sectors of the economy (including collaboration between government and the educational community, economic development organizations, workforce development organizations, and the business community).
 - **Labor force climate and legal environment**, i.e., the perception that the statewide labor force and labor legal environment (unions, labor laws, regulations, etc.) both may be obstacles to business development
 - Need to identify market failures or gaps and to **institute innovation-based business incentives that address these market failures / gaps**.
 - Need to **externalize entrepreneurial/innovation support** whenever it is practical so as to grow the innovation support community and catalyze innovation and entrepreneurship.
 - **Macroeconomic issues** (general macroeconomic conditions, global competition, the transition away from manufacturing, the downturn in agricultural prices, global political and financial instability, etc.) constrain economic development.
 - There are **pockets of distress in the region’s communities**, both large and small, which constrain economic activity and economic development.



- **Perceived potential regional image problems** (“an economically devastated rural backwater that has limited potential for economic development”) may contribute to the region’s difficulty in attracting firms, skilled workers, students, and visitors, and that discourages our own residents. The region needs to develop a better image, both externally and internally, so that it can move beyond this defeatist external perception and self-image.

5. Collaborative Leadership

- **Inadequate levels of proactive** (i.e., not reactive) **government strategic economic development practices focusing on common long-term/sustaining goals**
- **Shortage of local government financial resources and staff capacity** to undertake economic development initiatives.
- **Inadequate strategic economic development planning**, resulting in the lack of a portfolio of prioritized economic development initiatives, and the lack of designation and appropriation of capital funds to implement these initiatives.
- **Inadequate governmental focus (at all levels) on collaboration** with each other and with other sectors, including larger and smaller companies; public, private, and philanthropic sectors; academia and industry; "old" and "new" sources of wealth within the region; and the broadest possible composition of community by several socio-demographic characteristics (i.e., diversity).

Regional Opportunities

1. Human Capital

- **Opportunities for economic development that are created by the region’s labor force:**
 - Focusing strategic initiatives on significant regional occupation clusters
 - Linking available and displaced workers to employment and entrepreneurship opportunities
- **Opportunities to further develop the region’s labor force:**
 - Retention and employment of the region’s college graduates
 - Expansion of apprenticeship programs
 - Expansion of mentoring programs
 - Establishment of a regional sourcing portal for job and training opportunities
 - Increase support and accessibility for on-the-job training
 - Focusing job and training opportunities on local workers
 - Creation of transferable skill training programs
 - Investment in career talent pipeline initiatives
 - Investment in entrepreneurial development
 - Enhancing STEAM education

2. Traditional and Non-Traditional Infrastructure

- **Investment in traditional physical infrastructure** consistent with “smart growth” principles



- **Expansion and / or improvement of non-traditional physical infrastructure**, including:
 - Specialized space, dedicated equipment, information and communication technologies, business networks, linkages to the education/research/labor force training system, and logistics.
 - Encouragement of the development of physical facilities geared toward technology-based businesses, including specialized shared-use physical facilities, especially as regards technology development (i.e., prototype development, shared testing and manufacturing equipment, test beds, etc.), shortage of diverse and affordable physical space with specialized amenities (e.g., broadband, shared conference space, shared operating and office equipment, etc.).
- **Investment in shovel readiness**, including site development / industrial park expansion / infrastructure expansion / permitting / development along rail and highway corridors and broadband backbone corridor / interstate interchange development / spec building development
- **Downtown revitalization and building renovation / redevelopment**
- **Development of more sustainable neighborhoods and walkable communities**
- **Brownfield remediation and redevelopment**
- **Encouragement of “green infrastructure”**
- **Implementation of sustainable energy improvements** from the Western New York Regional Sustainability Plan
- **Protection and restoration of water resources, waterfronts, open spaces, and habitats**
- **Enhancement of public access to waterfront areas**
- **Enhancement of recreational / tourism assets**, including Lake Erie, Chautauqua Lake, Cuba Lake, Rushford Lake, the Allegheny and Genesee Rivers, State, county, and municipal parks, ski resorts, snowmobile/hiking/bicycle/recreational trails, and WNY Wilds
- **Capturing the potential of the Seneca Nation of Indians as a driver of economic development**

3. Innovation and Entrepreneurship

- **Target industry clusters**
 - Target industry clusters include:
 - Machinery manufacturing
 - Fabricated metal product manufacturing
 - Glass and ceramics
 - Agribusiness, food processing and technology
 - Forest and wood products
 - Tourism
 - Value-added export service sectors, including personal service occupations and medical occupations (e.g., therapy, counseling, and rehabilitation occupations, etc.)
 - **Target industry cluster development strategies** could include:



- Catalyzing the creation of additional value-added vertical supply chain and horizontal complementary companies in the relevant significant industry clusters and significant occupation clusters.
- Encouraging and incentivizing the attraction or local development of food processing businesses utilizing local food producing resources and transportation infrastructure.
- Encouraging and incentivizing the attraction or local development of secondary forest products processing businesses utilizing local forest producing resources and transportation infrastructure.
- Encouraging and incentivizing the attraction or local development of glass and ceramics manufacturing businesses utilizing technology and research capacity.
- Catalyzing tourism development through:
 - Expansion and improvement of public tourism destination facilities, recreational assets (including waterfront accessibility), and festivals / events (number and variety)
 - Encouraging and incentivizing privately owned tourism destination facilities and recreational assets
 - Revitalizing downtowns, creating special districts (e.g., arts, entertainment, specialized shopping, etc.) and improving walkability
 - Improving accessibility and wayfinding
 - Developing or improving gateway, visitor, and information centers that provide comprehensive information needed by tourists
 - Expansion and improvement of publicly owned, privately owned, and non-profit cultural and historical organizations, community assets, and programs
 - Incentivizing the expansion and improvement of the tourism, recreation, and leisure support sector
 - Regional and localized tourism branding/utilization
 - Expanded tourism marketing (including specialized marketing, such as coordination of multiple complementary and cross-sectional events and facilities, eco-tourism, arts tourism, recreational tourism, etc.) and enhanced development of a related business ecosystem
 - Increased coordination between destinations and events and the support sector
 - Increased coordination of regional event scheduling (to encourage extended visitor stays)
- **Entrepreneurship**
 - Development of an entrepreneurship and innovation culture through recognizing, supporting, incentivizing, and celebrating entrepreneurship and innovation
 - Creation of a formalized system of cluster-based business and entrepreneurial networks wherein members in a cluster (e.g., businesses, educational institutions, trade groups, employee organizations, etc.) can interact in an environment that fosters synergies and connections, including the scheduling of meetings (scheduled participatory talks on specific topics, delivering programmatic assistance, etc.),



- provision of meeting space and encouraging and incentivizing attendance and participation, creation of mentoring and ambassador programs, and creation of virtual meeting and networking spaces.
- Increased entrepreneurship education at all levels (e.g., primary and secondary education, colleges, and adult education)
- Expanding and enhancing non-technical entrepreneurial and small business assistance resources and providers (e.g., business planning assistance, etc.) and business development programs, and encouraging the utilization of these assets
- Enhancing entrepreneurial funding vehicles
- Increasing links between colleges and economic development organizations and private industry
- Encouraging incubator development/expansion
- Undertaking a regional business plan competition
- **Innovation**
 - Technology transfer and commercialization opportunities, consulting, contract research, short courses/workshops/conferences/other professional development opportunities to promote workforce development, etc., in conjunction with Alfred University and other regional and non-regional centers of technology research and development
 - Expanded and enhanced productivity enhancement programs and resources
- **General business development opportunities**
 - Improving regional business capital market accessibility, through:
 - Creation and expansion of various stage private and community venture capital funds
 - Expansion of revolving loan fund capitalization
 - Increased utilization of loan guarantees to leverage commercial bank financing
 - Assistance to businesses with accessing private and public funding sources
 - Expanded and enhanced productivity enhancement programs
 - Expanded small business and entrepreneurial assistance resources
 - Enhancement of export activity, through:
 - Facilitation of export assistance from federal and other sources
 - Export mentoring by regional businesses currently involved in exporting
 - Increased collaboration and participation of regional businesses with the region's university community with respect to export activities
 - Increased financial assistance to support export activity
 - Foreign outreach events
 - Assistance with developing export marketing materials
 - Assistance with export research
 - Assistance with export transportation logistics and foreign regulatory issues
 - Encourage and incentivize the development of internet-related, location-neutral, broadband-dependent businesses.



4. Quality, Connected Places

- **Increase regionalization of infrastructure services so as to improve cost efficiencies in local service delivery.**
- **Community centers**
 - Preserve and reinvigorate main streets and downtown business centers to avoid sprawl (“smart growth”), improve quality of life, and reduce the cost of service provision
 - Redevelopment and repair of buildings and public spaces, catalyzing commercial and services providers to locate in downtowns
 - Increase the availability of housing stock in downtowns
 - Create and improve creative districts
 - Increase walkability and wayfinding
 - Improve the relationship within communities of the built environment and the natural environment (e.g., public parks space and green space, trails, etc.).
- **Community institutions**
 - Stabilize and grow community institutions
 - Address any gaps in the presence of community institutions in the region’s communities.
- **Recreation assets**
 - Further develop the region’s privately and publicly owned recreational infrastructure
 - Make older communities walkable
- **Cultural assets**
 - Provide greater public and private support for the region’s cultural assets and cultural life
- **Housing and building stock**
 - Catalyze new construction and repair / renovation
 - Incentivize increased variety of alternative types of housing options to meet varied individual tastes and requirements
 - Remove blight
 - Reduce absentee ownership of rental properties
 - Incentivize energy conservation improvements and adaptive reuse
 - Incentivize increased supply and variety of the region’s commercial building stock through adaptive reuse, renovation and repair, and speculative building construction
- **Public education**
 - Consolidate schools and increase sharing to avoid potential duplication of services and high costs of education provision while making it easier to deliver state-of-the-art education services and facilities. Charter and private schools also are alternatives that can be considered.
- **Health care**
 - Enhancing the recruiting and retaining of doctors and other health care workers
 - Improving aging and out-of-date hospitals and nursing homes
 - Improving access to hospitals, emergency care facilities, and even local doctors in smaller communities



- Transitioning from a disease management focus to a prevention focus
- Reducing teen pregnancy and smoking rates, chronic disease, and childhood and adult obesity through obtaining additional funding to support chronic disease prevention programs
- Improving access to specialists in the region
- Improving transportation options to help people travel to appointments
- Encouraging active lifestyles by creating walkable communities
- **Environment and conservation practices**
 - Encourage and require proper conservation practices
 - Implement and maintain floodplain regulations requirements to protect first flush from storms to impact structures and water quality
 - Limit overuse or inappropriate land development
 - Regulate certain potentially damaging business practices
 - Encourage sound business and government environmental and conservation practices
 - Limit inappropriate development patterns and infrastructure design.
- **Social capital**
 - Encourage the development of the resources of the “social infrastructure” of community organizations and volunteer groups engaged in activities to benefit the community.
- **Improvement of community attitudes**
 - Improve certain negative and divisive community attitudes (including political, geographic, ethnic, and racial divisions) that negatively impact quality of life in the region
 - Reduce the amount of government through centralization, regionalization, and shared services
 - The region should market to itself to improve self-image and reduce public apathy and negativity.

5. Collaborative Leadership

- **Strategic comprehensive planning and economic development planning**, including:
 - Prioritized strategic economic development initiatives
 - Designation and appropriation of sufficient capital resources to implement these initiatives
 - Systemic investment in these targeted economic development initiatives
- **Enhanced levels of partnership and collaboration** between units of government and between government and the business community (including larger and smaller companies); the educational community; economic development organizations; workforce development organizations; public, private, and philanthropic sectors; and diverse communities within the region.
- **Investment in business development / business assistance capacity**, especially regarding target clusters, entrepreneurial development, and innovation.
 - **Target clusters:**



- Focus on, talk about, encourage, incentivize, facilitate, recognize, and celebrate the region’s significant industry and occupation clusters
- Develop and implement cluster-based economic development initiatives that help build these clusters and incentivize further development within these clusters
- **Entrepreneurship:**
 - Focus on, talk about, encourage, incentivize, facilitate, recognize, and celebrate entrepreneurship
 - Create a regional identity or brand that focuses on entrepreneurial activity and engage in regional marketing of that brand as a means of encouraging entrepreneurship
 - Tell entrepreneurial success stories in regional media outlets as well as social media outlets (blogs, tweets, etc.) so that these stories become known widely throughout the community and region
 - Position the region as a home for entrepreneurs, creating a "sense of place" with well-publicized locations of entrepreneurial activity (e.g., incubators, virtual networks, districts, etc.) and discernable nodes of creativity/activity/establishment churn
 - Seek to be recognized as a hotbed of entrepreneurial activity.
- **Innovation:**
 - Focus on, encourage, incentivize, facilitate, recognize, and celebrate innovation
 - Cross-fertilization of sectors (e.g., the business community, academia, economic development organizations, etc.) for innovation
 - Problem solving and creation of solutions and opportunities by participants from different business groups and industrial sectors
- **Governments at all levels need to innovate with respect to operating practices, including adoption of new technologies and reducing/consolidating/sharing services to promote better service delivery and reduce taxes.**

Regional Threats

1. Human Capital

- **Changing demographics**
 - The region’s aging population will increase the dependent population carrying cost burden and reduce size of productive-age workforce.
 - The region’s population decline and outmigration of its productive age population and youth will constrain economic development. This is in part a “brain drain,” i.e., the loss of individuals with advanced education and specific talents, knowledge, training, and skills from the region. Additionally, some of the region’s younger demographic leave the region to seek their education and/or employment outside of the region.
- **Labor force issues**
 - The region’s labor force is decreasing in size



- There are issues with workforce skills and preparedness.

2. Traditional and Non-Traditional Infrastructure

- **Age of infrastructure**
 - Risk of failure
- **Cost of maintaining, repairing, and improving**
 - May be passed on to businesses, impacting their viability and growth potential
 - Inadequate government financial wherewithal to support maintenance and improvement of strategic infrastructure
- **Potential disasters/dislocations**
 - 2020 coronavirus pandemic economic downturn dislocation
 - Ongoing risks of other economic dislocations caused by natural/man-made disasters, plant closures/downsizing, etc.
- **Innovation and Entrepreneurship**
- **Inadequate regional capacity to catalyze innovation and new business development and growth, especially as regards technology-based, value added, and net export businesses**
 - Threat of business relocation to other regions perceived as more friendly or facilitative to their development activities, or which offer greater technical, financial or workforce resources and incentives or less costly operating environments.
 - Threat of absentee ownership: Non-local owners typically are less committed to local operations and may close or relocate operations based upon financial considerations.
 - Inadequate succession planning: Locally owned businesses may be threatened or negatively impacted by inadequate preparation for succession or transition.

3. Quality, Connected Places

- **Rural quality of life**
 - Employees or business owners may decide to relocate based upon personal considerations related to the region's quality of life.
- **Global competition and competition from other domestic regions**
 - The region faces potential loss of businesses relocating to other areas, and potential downsizing or exit of companies impacted by foreign and domestic competition.
- **Economy**
 - Although there has been somewhat of an improvement in the domestic economy, the regional economy is lagging this recovery.

4. Collaborative Leadership

- **Financial constraints**
 - High cost of provision of government services
 - Too many levels of government (need for consolidation and service sharing)
 - Lower amounts of financial resources available for community projects (including infrastructure maintenance and improvements and economic development incentives)



- **Lack of leadership**

- Many smaller communities face difficulties with obtaining qualified and committed leaders with vision, expertise, and experience to occupy leadership and governance positions.

Strategic Implications

The various economic development issues, strengths, weaknesses, opportunities, and threats discussed above imply a number of strategic directions that the region should embrace in order to remove obstacles to creating a healthy, competitive, and sustainable economy and capture economic development.

While certain issues (e.g., state corporate and personal income tax burdens, state regulatory climate and compliance burdens, state workman’s compensation burdens, macroeconomic conditions, utility costs, winter heating costs, unfunded mandates, high transportation costs, rising health care costs, high municipal operating costs, labor force and labor legal environment, etc.) are structural in nature and remediating them is beyond the scope of a regional comprehensive economic development strategy, nonetheless there are many strategic steps that the region can take to respond to many of the other economic development problems that it faces.

Similarly, while certain strengths and opportunities may be beyond the realistic capacity of the region to capitalize upon (e.g., owing to financial and political constraints, imperfect knowledge, etc.), nonetheless there are many strategic steps that the region can take to capitalize on many of the economic development opportunities available to it. These steps (18 strategic foci) are enumerated in the CEDS chapter entitled “Vision / Goals / Objectives / Priority Strategic Foci / Strategies.”



Strategic Target Clusters

Significant Industry and Occupation Clusters

Economic development theory suggests that regions should devote efforts toward developing those industry and occupation clusters in which they have a competitive advantage.

With respect to **industry clusters**, competitive advantage is defined as those clusters having a location quotient (LQ) greater than 1.0. A location quotient is a ratio that compares regional employment in a particular industry to employment in that same industry at a larger geography (in this case, the USA as a whole). A location quotient of less than one indicates a lower proportion of employment for that industry in the Southern Tier West region than in the nation overall. A location quotient of more than one indicates a regional industry with higher concentration of employment compared to the national average.

With respect to **occupation clusters**, competitive advantage is defined as those clusters with the greatest employment, especially relative to other regions.

Significant Industry Clusters

The following is a list of the Southern Tier West region’s industry clusters with LQ’s greater than 1.0, ranked in descending order of LQ:

| <u>Cluster</u> | <u>Employment LQ</u> |
|---|----------------------|
| Tobacco | 14.90 |
| Production Technology and Heavy Machinery | 4.96 |
| Downstream Metal Products | 2.37 |
| Upstream Metal Manufacturing | 2.25 |
| Food Processing and Manufacturing | 2.19 |
| Livestock Farming | 1.50 |
| Furniture | 1.45 |
| Leather and Related Products | 1.43 |
| Lighting and Electrical Equipment | 1.29 |

Data Source: Statsamerica.org

Date: April 14, 2022

Several anomalies are present in the above data.

First, although our region has a higher concentration of persons working in the Tobacco cluster than the nation as a whole, there still are only 114 persons working in that cluster. Accordingly, it may not prove a viable target for economic development activities. Additionally, those tobacco cluster establishments are almost entirely Native American in ownership, and the process for encouraging development in this cluster is more complex than it perhaps might be in other clusters.



Second, although our region has a higher concentration of persons working in the Leather and Related Products cluster than the nation as a whole, there still are only 33 persons working in that cluster. Accordingly, it almost certainly a viable target for economic development activities.

The other clusters in the above list are perhaps more appropriate clusters for targeting economic development efforts, with respect to obtaining significant impacts in business activity and employment.

Let's look further at these individual regionally significant industry clusters, in order to understand the components of each cluster.

Production Technology and Heavy Machinery includes the following sub-clusters:

- Agricultural and Construction Machinery and Components
- Process Equipment and Components
- Industrial Machinery
- Air Handling Equipment
- Moving and Material Handling Equipment
- Commercial and Service Industry Machinery

Downstream Metal Products includes the following sub-clusters:

- Metal Products
- Fabricated Metal Structures
- Ammunition
- Metal Containers

Upstream Metal Manufacturing includes the following sub-clusters:

- Metal Processing
- Iron and Steel Mills and Forging
- Metal Products
- Wires and Spring

Food Processing and Manufacturing includes the following sub-clusters:

- Specialty Foods and Ingredients
- Baked Goods
- Dairy Products
- Packaged Fruit and Vegetables
- Malt Beverages
- Soft Drinks and Ice
- Candy and Chocolate
- Wineries
- Animal Foods
- Farm Wholesalers
- Milling and Refining of Cereals and Oilseeds
- Coffee and Tea
- Distilleries



- Milling and Refining of Sugar
- Glass Containers

Livestock Farming includes cattle, hogs, sheep, goats, and poultry of all kinds; also included in this major group are animal specialties, such as horses, rabbits, bees, pets, fish in captivity, and fur-bearing animals in captivity.

Furniture includes the following sub-clusters:

- Wood Cabinets and Woodwork
- Household Furniture
- Office Furniture
- Mobile Homes
- Institutional Furniture

Lighting and Electrical Equipment includes the following sub-clusters:

- Electrical Equipment
- Electrical Components
- Lighting Fixtures and Parts
- Storage Batteries

Let’s also look at employment and average wage in these regionally significant industry clusters:

| <u>Cluster</u> | <u>Employment</u> | <u>Average Wage</u> |
|---|-------------------|---------------------|
| Production Technology and Heavy Machinery | 3,709 | \$80,232 |
| Downstream Metal Products | 1,603 | \$59,064 |
| Upstream Metal Manufacturing | 617 | \$57,251 |
| Food Processing and Manufacturing | 2,265 | \$55,878 |
| Livestock Farming | 516 | \$32,578 |
| Furniture | 794 | \$47,079 |
| Lighting and Electrical Equipment | 373 | \$82,294 |

Data Source: Statsamerica.org

Date: April 14, 2022

The above data provide information for targeting economic development activities.



Significant Occupation Clusters

The following is a list of the Southern Tier West region’s significant occupation clusters, showing employment and average wage, and ranked in order of descending employment:

| <u>Cluster</u> | <u>Employment</u> | <u>Average Wage</u> |
|--|-------------------|---------------------|
| Food Preparation and Service | 8,098 | \$26,932 |
| Primary, Secondary and Vocational Education, Remediation and Social Services | 7,712 | \$53,233 |
| Attendants and General Services | 5,453 | \$24,611 |
| Health Care: Therapists, Technicians and Aides | 5,140 | \$30,557 |
| Managers and First-line Supervisors | 4,866 | \$65,098 |
| Sales, Agents, Brokers and Customer Relations, Support | 4,659 | \$30,875 |
| Transportation, Logistics and Dispatch, Support | 4,000 | \$31,199 |
| Financial, Legal and Inspection Services, Support | 3,819 | \$38,911 |
| Administration and Office Support | 3,534 | \$30,906 |
| Mechanics and Repair Technicians | 3,259 | \$39,006 |
| Managerial, Sales, Marketing and Human Resources | 3,009 | \$80,542 |
| Health Care: Nurses and Specialized Care Delivery | 2,638 | \$59,317 |
| Transportation Equipment Operators | 2,250 | \$38,559 |

Data Source: Statsamerica.org
Date: April 14, 2022

Strategic Implications

The above Industry Cluster and Occupation Cluster data provide information for targeting economic development activities. We can expect synergies when directing economic development efforts toward clusters in which significant industry clusters and significant occupation clusters overlap.

Economic Resilience

The region's economic prosperity is dependent upon its ability to prevent, withstand, and quickly recover from major disruptions (i.e., "shocks") to its economic base. Economic resilience includes the ability to avoid the shock, the ability to withstand a shock, and the ability to recover quickly from a shock. This section of the CEDS deals with economic resilience in terms of economic disruptions (1) arising from natural disasters and (2) arising from other causes. In both cases, the focus should be on both steady state (EDA's term for avoidance or mitigation or minimization in advance of a natural disaster) and response to a disaster. Additionally, this CEDS section focuses on economic disruption, as opposed to human safety or property damage or governmental operations, all of which are equally essential (or even more important) and all of which are beyond the focus and limited scope of this CEDS and perhaps more properly the province of other types of public safety and emergency response plans.

Economic Disruptions Arising from Natural Disasters

The types of natural disasters that could occur in the region include:

- Flood events
- Winter storm events
- Fire events
- High wind events
- Earthquake events
- Pandemic events

Of these types of disasters, flood events and winter storm events are the most common in the region.

The region has a county-level approach to economic resilience with respect to natural disasters. In each county in the region, the County department of economic development and the county industrial development agency have a relationship with the county office of emergency services that involves pre-planning for natural disasters and, once a natural disaster occurs, that provides for a coordinated response to that disaster.

The focus of the county offices of emergency services is planning for mitigating and responding to natural disasters, as they impact both publicly and privately owned assets; governmental, community, and business operations; and the general public. With respect to natural disasters, each county has both a hazard mitigation plan and a hazard response plan.

The hazard mitigation plan in one sense is a function of FEMA's and NYS Office of Emergency Management's focus on publicly owned assets. Accordingly, the county hazard mitigation plans focus primarily on preventing or minimizing damage to publicly owned assets in the event of a natural disaster. Economic resilience per se (i.e., with respect to a natural disaster's impact on private businesses) is not an element of the county hazard mitigation plans. However, natural disaster damage not only can negatively impact governmental or community facility operations; it also can disrupt private sector (business) operations. Accordingly, there is a role for county economic development organizations with respect to mitigation planning and assistance to



businesses and communities with respect to helping them avoid or minimize the negative impacts of natural disasters on the business community.

Recently, the overriding natural disaster and ensuing economic dislocation has been that associated with the coronavirus pandemic. In addition to the impact on public health, the region also has been concerned with economic resiliency. The pandemic has negatively impacted both the public sector (as a result of reduced revenues and social isolation constraints to government operations) and the private sector (i.e., business downsizings/suspensions/closures and consequent layoffs). Economic resilience strategies thus are an important element of the region's economic development strategy.

Economic Disruptions Arising from Other Than Natural Disasters

Other types of economic disruptions can be just as damaging to local and regional economies as are disruptions arising from natural disasters. Economic disruptions typically involve plant closures or downsizings/layoffs or production hiatuses arising from various causes.

Examples of potential causes for these other types of economic disruptions include:

- Persistent internal regional structural issues including:
 - Local dependencies on single employers or industries
 - Non-local ownership of certain major employers
 - Inadequate transportation access/options in some communities
 - Inadequate broadband availability in some communities
 - Labor force issues, including an inadequately educated workforce
 - Barriers to entrepreneurship and small business expansion
 - Inadequate access to small business finance
- Circumstantial issues, typically external but sometimes internal, including:
 - Economic downturns
 - Customer issues (domestic and international)
 - Technological obsolescence or competitiveness issues
 - Labor force issues, including labor stoppages
 - Supply chain issues or interruptions
 - Infrastructure service disruption
 - Water shortages
 - Chemical spills, etc.
 - Climate change

The region must address these types of business risks through both **steady state (mitigation or avoidance or minimization) initiatives** and **response initiatives (once disruptions occur)**. The following two sub-sections address these two topics.



Steady State Initiatives – Planning for and Implementing Economic Resilience Initiatives

1. Role of private businesses in steady state planning and implementation

- A. Identification of primary business risks relating to or caused by natural disasters, for example:
 - Energy supply disruptions
 - Facility damage or accessibility issues
 - Telecommunications or utility service disruptions
 - Etc.
- B. Identification of primary business risks relating to disruptions other than natural disasters, often the result of persistent economic challenges or deficiencies, for example:
 - Plant closures, downsizings, or interruptions of production
 - Reduction of purchasing from local vendors in the supply chain
- C. Development of plans for avoid or minimize disruptions from natural disasters, for example:
 - Backup energy supplies
 - Strengthening potentially physically challenged elements of facilities
 - Improving accessibility infrastructure / accessibility redundancy
 - Telecommunications redundancy
 - Improving utility infrastructure
 - Etc.
- D. Communication of risks and plans to communities, county emergency services offices, and economic development organizations

2. Role of communities in steady state planning and implementation

- A. Identification of primary business risks resulting from natural disaster, i.e., determination of which publicly owned assets, if damaged by natural disaster, could disrupt local business operations. Examples are culverts and bridges that are key element of accessibility to business facilities, etc.
- B. Participation in county hazard mitigation planning process with respect to these publicly owned assets that, if damaged by natural disaster, could disrupt local business operations. Include mitigation projects relating to these assets in the county hazard mitigation plan. Implement these mitigation projects in order to avoid disruption of local business operations. Project examples could include improving and reinforcing stream channels to avoid flooding damage, GIS database of municipal infrastructure, database of facility utility shut offs, enhancing channel capacity, restoring channel stability, etc.
- C. Continuation of safe development practices, including land use/zoning ordinances requiring the location of structures outside of floodplains, stormwater policies that



effectively manage stormwater so as not to create potentially disrupting flooding, the preservation of natural lands that function as buffers from storms, flood storage buffers from storms, the protection of community-built environments from the impacts of extreme weather, etc.

3. Role of economic development organizations in steady state planning and implementation

A. Creation of network(s) to facilitate active and regular communication between the relevant sectors to (a) collaborate, (b) collect and disseminate information about key elements (such as supply-chain relationships), and (c) ensure that the public, private, education, and nonprofit sectors are aware of each other's roles and responsibilities with respect to existing and potential future challenges. These networks should include:

- County emergency management offices
- County offices of economic development
- County industrial development agencies
- County workforce management office
- Local government officials (CEO, DPW, etc.) of affected communities
- Major employers and cornerstone institutions (e.g., hospitals, colleges, etc.)
- Southern Tier West

B. Creation of a business database

- Database should begin with largest employers
- Database should be GIS-based and served over the web by controlled access
- Data fields should include location, description of operations, description of any hazardous operations or materials, contact information, location of utility services, employee information

C. Identification of primary business risks relating to natural disasters. Recognize and collect business and community mitigation plans and county hazard mitigation plans.

D. Identification of pre-disruptions activities or initiatives that could help avoid or minimize disruptions, for example:

- Working with businesses to encourage off-site storage of critical data
- Working with businesses to encourage redundancy in telecommunications and broadband networks
- Working with businesses to encourage planning to resolve any post-disruption employee accessibility issues
- Working with businesses to identify and implement pre-disaster business activities or initiatives that could complement community or county hazard mitigation plans and projects
- Broadening the industrial base with diversification initiatives, such as targeting the development of significant industrial clusters with growth potential that could provide stability during downturns that disproportionately impact any single cluster or major employer



- Undertaking business retention and expansion programs
- Putting in place a means of availability of surge capital/credit resources in case they may be needed by local governments and/or major employers
- Creating cluster networks, industrial ambassador programs, and financial capital funds to assist businesses with economic recovery post-disruption
- Enhancing established formalized mechanisms that realign and retrain displaced workers post-disruption
- Improving workforce skills and cross training
- Tracking establishment “churn” and other data elements

- E. Regular preparation of a current assessment of the regional economy, regular monitoring of the state of preparedness to mitigate and respond to disruptions, and regular measurement and evaluation of pre-disaster planning/preparedness and post-disaster response

As a regional resource, Southern Tier West can serve as a source for information; technical, funding, and grantsmanship assistance; provider of GIS services and web-based serving of information; convener of teams for mitigation planning efforts, etc.

Response Initiatives – Planning for and Implementing Economic Resilience Initiatives

The focus of the county hazard response plans is recovery from natural disasters. In the case of the hazard response plan, the contents of the plans are not disseminated publicly, so as to avoid sensitive information becoming available to entities that might engage in terrorist or criminal behavior. However, the plans do include components involving government operations, community institutions (e.g., hospitals, etc.), businesses, and the general public.

In a natural disaster, the county emergency services offices, the police departments (State Police, county sheriffs, and local police), local public works departments – augmented in extreme cases by the National Guard, and other State agencies (Department of Environmental Conservation and Office of Emergency Management) – are the first responders and entities that are in charge of the immediate response activity, per a pre-determined hierarchy. Their activities can be supplemented by private sector services, e.g., contractors, etc. Their first concern is human/public safety, followed by property damage. Economic disruptions are perhaps more appropriately the focus of economic development organizations, which can become involved with working with businesses and communities as soon as it is safe to do so.

1. Role of economic development organizations in response planning and implementation

The county economic development organizations should convene planning meetings with stakeholders (including the business community, community leaders, police, and public works officials, etc.) to determine appropriate procedures and/or protocols for responses. This already is in place for natural disaster; if it is not present, this planning also needs to be put in place for other types of economic disruptions. Protocols should include:

- Planning and Preparation: The general process for economic response to natural disasters is that county economic development organizations are informed of disaster, and then develop a team comprised of primary stakeholders, including community



officials, key personnel from the business community, and others as needed. Roles and responsibilities are assigned, and key response actions are identified and implemented. Regular communication occurs between team members, so that additional issues can be addressed as they arise.

- **Planning and Preparation:** Economic development organizations should serve as an information hub (collecting data and convening the appropriate players to facilitate recovery post-disruption) and a Business Emergency Operation Center (BEOC) or Business Recovery One-Stop Center. Economic development organizations should utilize information networks among the various stakeholders in their counties for active and regular communications to collaborate on response initiatives, determining business and community needs, and monitoring of implementation of response.
- **Response:** Economic development organizations should assist communities and businesses with undertaking response projects. Assistance can include (but should not be limited to) help with accessing funding, contacting elected officials and regulatory officials, working with workforce organizations, etc.

As a regional resource, Southern Tier West can serve as a source for information; technical, funding, and grantsmanship assistance; provider of GIS services and web-based serving of information; convener of teams for mitigation planning efforts, to gather data and encourage collaboration post-disruption, etc.

Measuring Resilience

The region should measure its resilience through various standardized resilience measures, including the degree of regional income equality (i.e., how evenly income is distributed across a regional population) and the degree of regional economic diversification (i.e., degree to which economic activity is spread across sectors). As needed, the region should obtain and regularly update resiliency data with which to benchmark the region against national averages.

In our region, there is a relatively homogenous distribution of income as between the counties, relative to other regions. However, because of the generally lower-than-state-and-national-average per capita incomes and relatively higher-than-state-and-national poverty rates, it can be said that the region is perhaps less resilient than its income distribution would suggest. This perhaps has been exacerbated by the pandemic, and it remains to be seen whether economic recovery will include improvement in income distribution.

In our region, there has been a somewhat disturbing reduction in economic diversification, as manufacturing jobs are being replaced by service and commercial jobs, which often are lower wage, and which often do not provide benefits. Both the decreasing diversification rates and economic restructuring imply that the region might be less resilient than would be desirable. This perhaps has been exacerbated by the pandemic, and it remains to be seen whether economic recovery will include improvement in diversification.



Summary

1. Region's key vulnerabilities

- A. Natural disasters, especially flood and winter storm events and their direct impacts to businesses and indirect impacts to businesses via their direct impacts on infrastructure and community institutions
- B. Economic disruptions, especially the exit or downsizing of major employers and non-local ownership of some major employers, inadequate workforce skills, need for businesses to become more productive and adopt new technologies, low innovation rates, and low levels of entrepreneurship

2. Region's resilience-building goal

- A. Improve economic resilience through appropriate steady-state actions (avoidance, prevention, and mitigation of economic disruptions) and response actions (response to economic disruptions)

3. Region's resilience-building objectives

- A. Avoid disruptions (plant closures, plant downsizings, production hiatuses, etc.)
- B. Reduce severity and duration of disruptions post-incident (plant closures, plant downsizings, production hiatuses, etc.)

4. Region's resilience-building strategies

- A. Create county-level networks, which integrate emergency management personnel, economic development personnel, and other key stakeholders, to actively and regularly communicate and collaborate regarding proactive mitigation and post-disruption response
- B. Undertake appropriate infrastructure capital investment projects to mitigate potential disruptions due to natural disasters
- C. Diversify economy
- D. Upgrade labor force skills and job transferability
- E. Promote innovation, adoption of new technologies and productivity enhancement, and entrepreneurship
- F. Target development of emerging clusters
- G. Establish formalized mechanisms to realign and retrain local workforces post-disruption

Economic resilience initiatives (i.e., projects and programs) are included in the Action Plan and Projects chapters of this CEDS. This CEDS designates all these economic resilience projects as high priority projects.

Potential Strategic Initiatives

This section of the Appendix expands upon the Goals and Strategies contained in an earlier chapter of the CEDS. For each of the 32 economic development strategies (grouped under the 5 economic development goals), this section of the Appendix provides an expanded discussion, listing a portfolio of potential initiatives and projects – consistent with the CEDS goals, objectives, and strategies – that might be developed and implemented by potential project sponsors desiring to achieving the region’s economic development goals. That is, this list is provided as a reference document that perhaps may catalyze additional project development.

This list of potential strategic initiatives identifies – for each of the thirty-two strategies identified above – a list of representative potential initiatives and/or projects, the primary stakeholder(s) that might be responsible for the implementation of the initiatives/projects, and the potential opportunities for the integrated use of local, state, and federal funds.

The order of presentation of the individual strategies in each of the five goal areas matches the order of presentation of goals and strategies in the CEDS (see above). However, the thirty-two strategies, and the individual example/potential initiatives for each of the thirty-two strategies, are not prioritized or ranked in any order.

Goal #1: Human Capital – to develop a skilled labor force capable of creating a knowledge-based and innovation-based economy, and that encourages businesses to start, locate, and expand in the region

- 1. Retain and stabilize the regional population** to provide a sufficient population base to ensure the continuing viability of regional institutions and communities, and to provide sufficient labor force to ensure that the region’s economy can grow and develop. By and large, this is a function of economic opportunity, infrastructure (broadband, utility, and transportation improvements), business climate, cost of living, and quality of life.

Potential Sponsors: County planning departments and economic development organizations, educational institutions at all levels, training providers, WIB’s, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Regional marketing activities
- Recruitment of college graduates by local firms
- Career pipeline programs, including internships, mentoring, etc.
- Entrepreneurial development programs
- Displaced worker retraining and job placement programs
- Infrastructure improvement initiatives
- Home ownership programs



2. Improve regional population demographics, i.e., attract a skilled, younger demographic population, to stabilize and grow the region’s population and labor force, and to reduce the impact of the region’s dependent population demographic.

Potential Sponsors: County planning departments and economic development organizations, educational institutions at all levels, training providers, WIB’s, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Regional marketing activities
- Recruitment of college graduates by local firms
- Career pipeline programs, including internships, mentoring, etc.
- Entrepreneurial development programs
- Research and survey what young people want in their ideal community (e.g., cultural attractions, etc.), and work to develop communities consistent with these findings to make them more attractive to a younger demographic
- Develop more scholarship programs

3. Improve regional educational attainment through enhancing our region’s educational system and services; increasing the percentage of the population acquiring advanced educational degrees at the associate, bachelors, masters and doctoral levels; encouraging the region’s best and brightest to stay in the region to pursue their careers and lives; encouraging enhanced STEAM (Science, Technology, Engineering, Arts, and Mathematics) education, leadership, technology-based education, and entrepreneurial education at the primary, secondary, post-secondary, and adult education levels; and encouraging enhanced career development planning early on during education to help guide the younger demographic into careers with futures.

Potential Sponsors: Educational institutions at all levels, training providers, WIB’s, county planning departments and economic development organizations, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Encouragement of advanced educational attainment
- Encouragement of vocational education
- Improvements in educational offerings, especially in STEAM, entrepreneurship, and technology
- Leadership training
- Implementation of educational programs that encourage creativity and problem solving



- Promotion of cooperation between local educational institutions
- Investment in colleges and universities in the region, especially public sector institutions

4. Increase the quantity and quality of human capital through education, workforce training, job training, internships, and other mechanisms, to develop a highly skilled, tech-savvy regional labor force that meets current and future employer needs.

Potential Sponsors: Educational institutions at all levels, training providers, WIB's, county planning departments and economic development organizations, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Encouragement of workforce productivity enhancement programs, including:
 - Increased implementation of general and specialized labor force and workforce development and training programs, including skills upgrading, basic training, and literacy programs
 - Reduction of workplace substance abuse
 - Increased availability of affordable child, elder, and dependent day care
 - Increased availability of health insurance and wellness programs to improve workforce health and productivity
- Career talent pipeline initiatives, apprenticeships, pre-apprenticeships, internships, “soft skills” education, and other job preparation programs, including, for example, career talent pipeline initiatives in strategic industry sectors such as Dream It Do It for the manufacturing industry and iSciWNY for the health care industry
- Encouragement of vocational and non-vocational education and training related to current and future employer-specific and cluster-specific needs, including utilization of the New York State Next Generation Job Linkage Program, encouragement of transferable skills training , and encouragement of training with respect to employment-related use of technology
- Engage business and industry representatives within individual school districts to collaborate with teachers at schools and BOCES (Board of Cooperative Educational Services) in their districts to add rigor and practicality to STEAM (science, technology, engineering, arts, and mathematics) programs
- Establish a sourcing portal for assessment, career planning, job listings, and training opportunities to augment capacities of existing one-stop centers



5. Focus on **building and capitalizing on regionally significant occupational clusters** as a development asset.

Potential Sponsors: Educational institutions at all levels, training providers, WIB's, county planning departments and economic development organizations, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Build occupational clusters by encouraging education and transferable skills training related to current and future employer-specific and cluster-specific needs
- General and specialized labor force and workforce training projects
- Build occupational clusters by development of networks between companies and workers in clusters
- Incentivizing occupational cluster development through enhancing benefits of employment in clusters, e.g., insurance, retirement, investment opportunities, purchasing clubs, etc.

Goal #2: Traditional and Non-Traditional Infrastructure – to maintain and improve the region's built environment and services that are requisite for retaining and expanding existing businesses and attracting new businesses

6. Maintain and improve **transportation infrastructure**, consistent with smart growth principles and sustainability principles, and utilize the region's transportation infrastructure as a driver of economic development.

Potential Sponsors: NYS DOT, county governments (including county DPW), local governments (including local DPW), social services agencies, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Improvement and development of interstate highways I-86 and I-90 as regional economic development corridors
- Continued construction of I-219 (Interstate Route 219), a primary north-south limited access highway corridor bisecting the region, as part of a multi-state development corridor. Initial pre-construction phase to include Supplemental Environmental Impact Statement (EIS) Study Project.
- Additional investment in other highway trade corridors, including NYS Routes 16, 19, 60, and 62 and other local and State highways and bridges, including complete streets/walkable community projects
- Additional investment in railroad infrastructure, including maintenance of and improvements to the existing railroad system to maximum practical FRA standards for



freight handling capacity, construction that removes clearance obstructions and/or weight limitations, phased construction of freight transfer transload facility in region, and construction of rail sidings and assistance to businesses to develop rail freight shipping capacity

- Additional investment in aviation infrastructure and service
- Additional investment in mobility management infrastructure and service (public transportation)
- Coordination of mobility management services with employers, social services agencies, and health care providers
- Continuously update the Regional Strategic Transportation Plan
- Work toward development of an RPO for the region
- Continuously develop a current priority transportation investment schedule for the region’s transportation infrastructure that considers economic development issues
- Specific topical transportation planning activities

7. Maintain and improve utility infrastructure, including water and wastewater service, natural gas and electricity service, and broadband and alternative energy infrastructure; whenever possible, such investments should be consistent with smart growth principles, sustainability principles, and green infrastructure principles.

Potential Sponsors: Local governments (utility and energy infrastructure); county governments and Southern Tier West RPDB (broadband); county economic development organizations: various including local and county governments and private sector (energy improvements and energy projects)

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Municipal water and wastewater systems, access roads, and local roads and bridges
- Publicly owned and privately owned municipal energy system projects, including alternative energy projects and the creation of a regional energy purchasing alliance
- Implementation of strategic projects identified in the comprehensive smart growth plan for regional sustainability developed through the five-county Western New York Region “Cleaner, Greener Communities Regional Sustainability Planning Program,” funded through NYSERDA.
- Regional broadband and communications infrastructure initiatives
- Identification and GIS-based inventorying of existing and planned infrastructure
- Investigation of incorporation of fuel cell technologies at municipal wastewater treatment plant, to produce three value streams (electricity, hydrogen, and heat)



- Enhancement of the region’s infrastructure development finance capacity, including the creation and utilization of innovative infrastructure funding tools and partnerships
- Utilization of funding assistance from the Southern Tier West Development Foundation to promote infrastructure planning and preliminary engineering
- Technical assistance from County Departments of Planning and Development, County Health Departments, and County Industrial Development Agencies to promote infrastructure planning and preliminary engineering

8. Improve the region’s “**shovel readiness**” through activities including site development / industrial park and acreage expansion / infrastructure expansion / permitting / development along rail and highway corridors and broadband backbone corridor / interstate interchange development / spec building development / building redevelopment, all consistent with smart growth principles.

Potential Sponsors: County economic development organizations, local governments, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Site development, especially along rail and highway corridors and the broadband backbone corridor, or at site locations identified in broadband study, or in or adjacent to industrial parks or other industrial land uses or compatible land uses
- Expansion of existing industrial and business parks and construction of new industrial and business parks, consistent with smart growth principles
- Infrastructure expansion, to permit or catalyze business location or expansion, especially within or adjacent to industrial parks or other industrial land uses or compatible land uses, but consistent with smart growth principles
- Permitting assistance initiatives
- Interstate interchange development, including shovel readiness initiatives at perspective business location sites, including:
 - I-86 Exit 6 (Sherman, Chautauqua County)
 - I-86 Exit 13 (Falconer, Chautauqua County)
 - I-86 Exit 17 (Steamburg, Cattaraugus County)
 - I-86 Exit 23 (Limestone, Cattaraugus County)
 - I-86 Exit 24 (Allegany, Cattaraugus County)
 - I-86 Exit 27 (Hinsdale, Cattaraugus County)
 - I-86 Exit 28 (Cuba, Allegany County)
 - I-86 Exit 29 (Friendship, Allegany County)
 - I-86 Exit 30 (Amity, Allegany County)
 - I-90 Exit 61 (Ripley, Chautauqua County)
 - I-90 Exit 60 (Westfield, Chautauqua County)
 - I-90 Exit 59 (Dunkirk, Chautauqua County)



- I-90 Exit 58 (Irving, Chautauqua County)
 - Construction of speculative / non-speculative industrial, logistics, and office buildings and multi-tenant facilities
 - Adaptive building renovation, rehabilitation, redevelopment, and reuse projects, converting older buildings into modern productive facilities, especially in downtowns or in business districts
 - Remediation of brownfield acreage and buildings and redevelopment of these assets into productive uses
 - Marketing of these assets to prospective businesses that might locate in the region
9. Develop, improve, and expand **non-physical or non-traditional infrastructure**, including specialized space, dedicated equipment, information and communication technologies, business networks, linkages to the education/research/labor force training system, and logistics; and also including the development of physical facilities geared toward technology-based businesses, including specialized shared-use physical facilities, especially as regards technology development (i.e., prototype development, shared testing and manufacturing equipment, test beds, etc.), shortage of diverse and affordable physical space with specialized amenities (e.g., broadband, shared conference space, shared operating and office equipment, etc.).

Potential Sponsors: County economic development organizations, educational institutions, incubators, business community, cluster network groups, broadband service providers, local governments, WIB's, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Incubator initiatives
 - Specialized facility development initiatives
 - Specialized equipment initiatives
 - Business network development
 - Technology commercialization initiatives, including prototype development, shared testing and manufacturing equipment, test beds, etc.
10. **Improve communities** through initiatives including downtown and neighborhood revitalization and redevelopment; building renovation / adaptive redevelopment / re-purposing and reuse; encouragement of improved sustainability of communities and neighborhoods, complete streets, and walkable communities; brownfield remediation and redevelopment; protection and restoration of water resources, waterfronts, open spaces, and habitats; enhancement of public access to waterfront areas; increasing and improvement of housing stock and building stock; creation and improvement of creative



districts and neighborhoods; improvement of wayfinding; and enhancement of recreational / tourism assets (including public parks space, green space, trails, etc.).

Potential Sponsors: County economic development organizations, county DPW's, local governments, local/community development and housing organizations, Southern Tier West RPDB, NYS DEC

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Downtown and neighborhood revitalization and redevelopment initiatives, consistent with smart growth principles
- Building renovation / adaptive redevelopment / re-purposing and reuse, consistent with smart growth principles
- Encouragement of improved sustainability of communities and neighborhoods, complete streets, and walkable communities
- Brownfield remediation and redevelopment initiatives
- Protection and restoration of water resources, waterfronts, open spaces, and habitats
- Enhancement of public access to waterfront areas (including riverfronts and lakefronts)
- Increasing / improving housing stock and building stock
- Creation and improvement of creative districts and neighborhoods
- Improvement of wayfinding; and enhancement of natural and man-made recreational / tourism assets (including public parks space, green space, greenway/blueway/other trails, facilities, attractions, etc.)

Goal #3: Innovation and Entrepreneurship – to catalyze innovation and new business development and growth, especially as regards technology-based, value added, and net export businesses

11. Target economic development activities and initiatives toward significant regional industry clusters and occupation clusters that are value-added and net export clusters.

Potential Sponsors: County economic development organizations, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds; private sector funds

Examples of potential initiatives/projects:

- Engagement in cluster-specific strategies, i.e., specific initiatives targeting the following clusters: machinery manufacturing, fabricated metal product manufacturing, glass/ceramics/advanced materials, agribusiness/food processing/technology, forest and wood products, and tourism; additional focus should be given to technology-based businesses and value-added export service sectors, including personal service



occupations and medical occupations

- Ceramics, glass, and advanced materials cluster, through technology transfer from research institutions to the business and entrepreneurial communities in the cluster, and through assistance in realizing opportunities by businesses in this cluster, and through startup of new cluster businesses
- Agribusiness, food processing and technology cluster, especially in primary production and secondary processing, through assistance in realizing opportunities by businesses in this cluster, through adoption of new technologies by businesses in this cluster, and through startup of new cluster businesses
- Forest and wood products cluster, through promotion of increased secondary processing (e.g., dimensioning, furniture manufacturing, etc.) activities, and through assistance in realizing opportunities by businesses in this cluster, and through startup of new cluster businesses

Other cluster-specific initiatives could include:

- Information technology and telecommunications cluster, through increased utilization of broadband infrastructure, e.g., attraction of back offices, call centers, regional data storage, increased web marketing presence, etc., through assistance in realizing opportunities by businesses in this cluster, and through startup of new cluster businesses
- Arts, entertainment, recreation and visitor industries cluster, through enhanced development of recreational and tourism destination facilities and cultural assets and services, creation of year-round tourism at destinations that currently are seasonal destinations, increased integration of heritage and cultural tourism with non-heritage/cultural tourism to increase the number and duration of visitor stays, and enhanced centralization and coordination of tourism and recreational marketing and promotion and event scheduling
- Biomedical/biotechnical (life sciences) cluster through developing increased linkages to the economic development and technology initiatives being undertaken in Erie County in this cluster, through targeted assistance to realizing opportunities by businesses in this cluster, and through startup of new cluster businesses
- Transportation and logistics cluster, through enhanced access to transportation infrastructure and services, through development of sites and building attuned to cluster business needs, through marketing of locations within the region to cluster businesses, and through targeted incentives and other assistance to existing and prospective cluster businesses
- Computer and electronic products, through targeted assistance to realizing opportunities by businesses in this cluster, and through startup of new cluster businesses
- Green and alternative energy business cluster through targeted assistance to development and incorporation of new technologies and startup of new businesses



- Capitalize on occupational clusters by targeting development of companies and entrepreneurship within the target occupational clusters
- Networking initiatives
- Needs /opportunities assessment initiatives: In-person contact and surveys of businesses and other entities (e.g., universities, trade associations, etc.) within the target clusters to determine their needs and their suggestions for initiatives and assistance that would catalyze business development within the target clusters
- Targeted education / skills training initiatives: Identification of the labor force needs of businesses in selected target clusters, and the encouragement of targeted secondary and post-secondary education college educational offerings and skills training programs to meet these needs
- Targeted marketing initiatives that market opportunities in the region to businesses in the target clusters, and encouragement of the location of operations within the region
- Targeted business assistance initiatives directed toward significant regional industry clusters and occupation clusters
- Encouragement of entrepreneurship in the target clusters
- Encouragement of cross-contact between businesses in the target clusters, and between the business community and university research community, with the goal of enabling businesses in the target clusters to discover and realize potential opportunities that may be present

12. Promote and catalyze **entrepreneurship**.

Potential Sponsors: County planning departments and economic development organizations, educational institutions at all levels, local/community development organizations, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds; private sector funds

Examples of potential initiatives/projects:

- Enhanced entrepreneurship education (“creating a pipeline of entrepreneurs”), through:
 - Inclusion of entrepreneurship concepts in K-12 in-school curricula, preferably using experiential learning techniques
 - Development and expansion of programs encouraging student-created and student-run after-school entrepreneurship programs
 - Integration of entrepreneurship into a wide range of courses and disciplines at post-secondary education institutions
 - Development of business plan competitions and other innovative methods of encouraging entrepreneurship



- “Widening the entrepreneurial pipeline” through innovative programs such as:
 - Adult entrepreneurship training and technical assistance, including basic business planning, marketing assistance,
 - Enhanced assistance to prospective entrepreneurs and startups, including business planning and counseling assistance, marketing assistance, financial education, product development and marketing assistance, utilization of web-based business infrastructure and services, export assistance, technology assistance, and other types of technical and management assistance
 - Innovative financial assistance such as enhanced venture capital availability and enhanced debt and equity assistance, etc.
 - Improved access to capital by entrepreneurs and businesses, through:
 - Provision of training and assistance to entrepreneurs and businesses seeking debt and equity capital infusions to help them create better funding assistance applications
 - Capitalization and utilization of public sector and non-profit revolving loan funds and venture capital funds to meet capital demand, especially with respect to (a) start-up and early stage business situations in which subordinate collateral asset lending positions are needed to leverage senior collateral asset position private sector debt and equity capital into project funding structures, and (b) the specific needs of entrepreneurs at different levels of development
 - Encouragement of the increased use of public sector guarantee programs (SBA 7A, USDA RD B&I, etc.) to encourage commercial lenders to provide debt financing to start-ups
 - Development and utilization of non-traditional public business financing sources (e.g., public sector equity/venture capital fund, etc.), including the Western and Central New York's Region Entrepreneurship Action Plan (REAP) program and the New York State Innovation Venture Capital Fund
 - Encouragement of the increased use of and improved access to private sector angel and venture capital small business financing
 - Entrepreneurial community and cluster networking to promote access to networks and entrepreneurial culture, through:
 - Creation of networks, mentoring, and ambassadors programs that allow entrepreneurs to share ideas, learn from one another, and conduct business together, linking them to new markets, new sources of capital, new employees, strategic alliance partners, and service providers
 - Encouragement of increased cultural, social, and civic engagement that will encourage, nurture, and raise the profile of entrepreneurs, helping them achieve success and encouraging others to become entrepreneurs



- Networking and collaboration initiatives
 - Entrepreneurial mentoring and entrepreneurial internship programs, such as Business Mentor NY
 - Undertaking a regional business plan competition
 - Celebration of entrepreneurship
- Business incubator initiatives, and incubator business development initiatives, including utilization of the New York State Business Incubator and Innovation Hot Spots Program
- Increased collaboration and links between the university, business, and economic development communities, especially as regards industry cluster building
- Market entrepreneurial opportunities to college graduates and those who previously had out-migrated from the region
- Promotion of the utilization of START-UP NY Program
- The creation and utilization of non-traditional ownership mechanisms and business ownership formats (e.g., publicly owned, quasi-public-owned, private-non-profit-owned, joint venturing and partnering mechanisms, ESOPS, and umbrella business start-up corporations) to start-up/spin-off program to catalyze new business creation
- Encouragement of broadband-based business development, especially at locations along the fiber trunk line

13. Incentivize and catalyze enhanced business productivity, innovation, technology transfer, technology adoption and commercialization, and collaboration/partnerships between the university, business, and economic development communities.

Potential Sponsors: Business community, county economic development organizations, municipal development departments, educational institutions, local/community development organizations, State and federal business development agencies, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds; private sector funds

Examples of potential initiatives/projects:

- Analysis of the productivity and technology utilization of individual businesses to develop business-specific assistance
- Education of individual businesses regarding the technologies, improvements, and productivity enhancements that might be appropriate for and available to them
- Provision to individual businesses of the specific financial, technical, and training assistance that is necessary to encourage and enable them to adopt new technologies and other productivity-enhancing improvements, including:
 - Replacement, upgrading, and updating of obsolete and inefficient physical plants,



machinery, and equipment

- Increased utilization in business operations of computerization, robotics, telecommunications infrastructure, internet, etc.
- Encouragement of increased levels of technology transfer at both the supply side (e.g., at both regional technology research institutions and extra-regional technology research institutions) and the demand side (i.e., in the business and entrepreneurial communities)
- Technology commercialization initiatives
- University-business collaboration and partnership initiatives
- Technical consulting initiatives
- Internship placement activities
- Mentoring activities
- Promotion of increased utilization of by-products, resulting in (a) cash flow generating economic activity and (b) reduction of waste produced, waste handling costs, and waste disposal costs

14. Provide adequate and innovative business development finance resources, technical assistance, and outreach as needed to catalyze and incentivize new private sector business development and assist in the retention and expansion of existing regional businesses.

Potential Sponsors: County governments and economic development organizations, educational institutions, local/community development organizations, business community, State and federal business development agencies, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Projects to capitalize and encourage appropriate use – as development tools – of specialized business development zones, industrial development agencies, and innovative debt and equity incentive financing programs including industrial incentive financing, industrial revenue bonds, revolving loan funds, venture capital financing, public sector or community-based equity capital (including the Western and Central New York's Region Entrepreneurship Action Plan (REAP) program and the New York State Innovation Venture Capital Fund) and micro-capital funds (especially seed or first stage capital funds), etc.
- Use of pension and community endowment funds to invest in local job creation strategies and to provide community venture capital for nonprofits, entrepreneurs, and employee-owned firms.
- Technical assistance to business, entrepreneurs, and prospective entrepreneurs, including business planning, counseling and crisis assistance, procurement, export, marketing, productivity enhancement, new technology, engineering, human resource



development, vending, procurement, operational, environmental / other compliance, and other technical and financial assistance, etc.

- Development and utilization of a standardized team-based client/prospect management system to be used by economic development and human resource organizations, to include:
 - An integrated internet-based site/building database, including database management protocols, and a lead agency system for client/prospect management
 - Provision of consistent information and contact information at municipal and county offices
 - An integrated internet-based economic development program database
 - Training of system users to improve networking amongst economic development and human resource organizations, to increase understanding of each other’s capabilities and missions, to improve referral performance, and to reduce response times and costs experienced by target clients/prospects
- Provision of training and assistance to businesses and entrepreneurs seeking debt and equity capital infusions to help them create better applications
- Streamlining access to existing public revolving loan funds
- Increased private sector access to private sector financing, through:
 - Encouragement of commercial banks to offer aggressive, development-oriented non-traditional lending practices to the specific selected target clusters
 - Increased utilization of public sector guarantee programs (SBA 7A, USDA RD B&I, etc.) to catalyze increased access to commercial bank loans
 - Encouragement of the increased use of and improved access to private sector angel and venture capital small business financing
- Workforce development and training initiatives
- Initiatives to encourage broadband-based business development, especially at locations along the fiber trunk line
- “Buy local” programs and other local vendor sourcing programs

15. Assist in the retention and expansion of existing regional businesses.

Potential Sponsors: County development departments and economic development organizations, local/community development organizations, State and federal business development agencies, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Business visitation initiatives



- Economic resilience initiatives
- Technical and financial assistance initiatives providing assistance as needed by regional businesses
- Workforce development and training initiatives
- Regulatory assistance initiatives
- Business productivity assistance initiatives
- Mentoring initiatives
- Development of programs to assist businesses with utilizing their excess production capacity and labor force surpluses
- Promotion and development of multi-firm operating and/or marketing initiatives, and/or shared supplier networks
- Encouragement of government procurement and regional and international exports
- Encouragement of the maintenance of local ownership of manufacturing, value-added and export sector firms, and promotion of the return of non-locally owned manufacturing, value-added and export sector firms to local ownership
- Assistance with the takeover of a failing or otherwise exiting business by employees (e.g., an ESOP), and provision of assistance to employee-owned businesses

16. Attract new businesses to the region.

Potential Sponsors: County development departments and economic development organizations, local/community development organizations, business community, State and federal business development agencies, Buffalo Niagara Enterprise, real estate community, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Regional marketing initiatives, including:
 - Development and maintenance of databases of buildings and sites within the region, in conjunction with the private sector real estate brokerage community
 - Increased utilization of BNE and NYS ESD marketing programs
 - Increased direct marketing activities to business in target clusters
 - Increased utilization of site development publications and consultants
 - General direct extra-regional marketing activities involving marketing the entire region as a brand, at the three-county and five-county Western New York levels, focusing on our collective workforce talents, low (or at least competitive) cost of living, low (or at least competitive) cost housing, and rural quality of life



- Increased readiness for business development, including development of shovel-ready sites, construction of speculative buildings, renovation of redevelopable buildings, remediation of brownfield sites and buildings, enhancement of utility and other required services, etc.
- Regional business ambassador initiatives, through which successful local businesspersons would meet with businesses and entrepreneurs considering locating businesses within the region in order to provide a sense of the region is a realistic and positive choice for their business location
- Development and utilization of project teams that will respond to individual businesses interested in locating within the region
- Innovative financial assistance initiatives

Goal #4: Quality, Connected Places – to create quality, connected, safe, convenient and healthy places to live and work, that make the region attractive as a place to live, work and do business

17. Maintain and improve the region’s cornerstone and **community-based and civic institutions and quality of life assets**, capacities, and services to improve area quality of life and positively impact economic development.

Potential Sponsors: County planning and development departments, social service organizations, civic institutions, arts/cultural/history organizations, local governments, local/community organizations, non-profit sector, private sector/business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Initiatives to support, stabilize and enhance community, civic, and social institutions and organizations
- Community facility, civic facility, civic places, recreational assets, and cultural assets construction, renovation, and improvement initiatives
- Initiatives to support, stabilize and enhance cultural (arts, historical, and entertainment) capacity, assets, institutions, services, and offerings
- Central business district improvement initiatives
- Public safety initiatives / initiatives to reduce crime
- Public health initiatives
- School and educational initiatives
- Broadband initiatives



18. Develop, maintain, and promote a range of housing choices and opportunities for all residents; efficient public transportation systems; safe pedestrian networks; access to quality health care and educational facilities; and other quality of life amenities.

Potential Sponsors: Housing: County planning departments, Community-Based Housing Organizations (Neighborhood Preservation Companies, Rural Preservation Companies, etc.), banks, developers and landlords, municipalities, Southern Tier West RPDB
Public transportation:
Pedestrian networks:
Health care: NYS DOH, county health departments, hospitals and health care providers, Southern Tier West RPDB
Educational facilities:
Other quality of life amenities:

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Initiatives to improve **housing choices and opportunities** for all residents, including:
 - Home ownership and home improvement programs
 - Incentivization and encouragement of construction and rehabilitation of different types of housing
- Initiatives to improve the **efficiency of public transportation systems** for all residents, including:
 - Additional investment in mobility management (public transportation) infrastructure and service
 - Coordination of mobility management services with employers, social services agencies, and health care providers
- Initiatives to improve **access to quality health care** for all residents, including:
 - Patient center medical home / patient neighborhood initiatives, to build connections between primary care and specialty care, especially as regards mental health and substance abuse
 - Increased use of electronic health records
 - Recruitment of physicians, nurses, and specialized technical service providers
 - Urgent care in rural communities
 - Initiatives to stabilize financial hospitals in rural communities, including critical access hospital initiatives
 - Regionalization of health care through CIO (Clinical Integration Organization) or ACO (Accountable Care Organization) initiatives and sharing of resources (people and equipment)



- Connecting community health care with public health and other community-based organizations with similar goals to reduce the incidence of chronic disease, etc. (e.g., diabetes, group counseling, obesity, etc.)
- Promotion by local providers of utilization and consumption of local foods by institutions and residents
- Initiatives to improve **safe pedestrian networks** for all residents, including:
 - Complete streets programs
 - Walkable communities programs
 - Urban and rural trail projects
- Initiatives to improve **access to quality educational facilities** for all residents, including:
 - Expansion of educational facilities at educational institutions
 - Development of innovative educational and training programs at educational institutions
 - Scholarship and financial assistance programs to incentivize educational enrollment and attainment, also including work study, internships, etc.

19. Utilize smart growth principles to ensure cost effective growth and development while minimizing sprawl.

Potential Sponsors: County planning departments and economic development organizations, local governments, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Comprehensive planning initiatives, land use planning, and land use regulations that are consistent with smart growth principles

20. Promote the region's diversity.

Potential Sponsors: County governments, county planning departments and economic development organizations, local governments, local/community development organizations, educational system, non-profit sector, private sector, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Enhanced engagement and enfranchisement of disenfranchised sectors, including but not limited to women and racial/ethnic/religious minorities
- Promotion of utilization of MWBE procurement and MWBE business development



- Training and entrepreneurial programs targeting disenfranchised sectors, including but not limited to women and racial/ethnic/religious minorities
- Leadership development programs targeting disenfranchised sectors, including but not limited to women and racial/ethnic/religious minorities
- Celebration of disenfranchised sectors and their cultures, including but not limited to women and racial/ethnic/religious minorities

21. Enhance and promote the region’s cultural, arts, history, and tourism assets, destinations, organizations, and services.

Potential Sponsors: Arts/cultural/history organizations, county planning and development departments, county DPW’s, tourism agencies, local governments, local/community organizations, non-profit sector, private sector/business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Financial, technical, and programmatic support initiatives for cultural, arts, history, and tourism assets, destinations, organizations, and services
- Incentivization of the development and expansion of cultural, arts, history and tourism asset and destination facilities
- Regional marketing and coordinated scheduling activities

22. Develop, maintain, and promote integrated connections between communities both across the region and external to the region.

Potential Sponsors: Local governments, local/community organizations, county planning and development departments, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Shared services initiatives
- Consolidation initiatives
- Inter-community infrastructure services
- Joint intermunicipal planning and development projects

23. Promote and protect the region’s natural resources in a sustainable manner.

Potential Sponsors: County planning and development departments, local governments, NYS DEC, business community, local community organizations, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:



- Environmental and habitat protection initiatives
- Water resource protection initiatives
- Implementation of strategic projects identified in the comprehensive smart growth plan for regional sustainability developed through the five-county Western New York Region “Cleaner, Greener Communities Regional Sustainability Planning Program,” funded through NYSERDA
- Promotion of increased environmentally sound utilization of the region’s natural resources, and improved business compliance with environmental regulations
- Encouragement and enhancement of renewable energy exploration and production in an environmentally sensitive manner
- Promotion of the region as a destination for outdoor recreation activities while preserving the natural rural environment (enhancement of access to nature and environmental preservation)

24. Streamline and reform permitting, development review, and other regulatory processes to provide a predictable legal and regulatory environment for businesses.

Potential Sponsors: County departments, local governments, NYS DEC, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Permit and regulatory technical assistance initiatives

25. Ensure regional and local agencies provide collaborative, seamless, consistent, and timely customer service to business.

Potential Sponsors: County departments, local governments, NYS DEC, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Permit and regulatory technical assistance initiatives
- Collaborative assistance programs

26. Develop a business-friendly regulatory and tax system and business assistance/incentive programs.

Potential Sponsors: County departments, local governments, NYS DEC, business community, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Permit and regulatory technical assistance initiatives



- Collaborative assistance programs

27. Enhance **regional marketing capacity and activities.**

Potential Sponsors: County planning departments and economic development organizations, local governments, local/community development organizations, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds; foundation funds

Examples of potential initiatives/projects:

- Regional and local marketing initiatives, including:
 - Internal and external marketing of the quality of life in the region, including rural character, low crime rates, education and health services, recreational and cultural opportunities, etc.
 - External tourism marketing, including marketing of recreational, entertainment, sporting, and cultural assets
 - Targeted external marketing directed toward target industry clusters and specific development opportunities, encouraging high-wage, high-skill businesses to develop in the region
 - Market entrepreneurial and employment opportunities to college graduates, to those who previously had out-migrated from the region, and to displaced workers
 - Increased participation in global trade shows
 - Increased use of US DOC International Trade Administration and NYS ESD channels for international marketing
 - Increased utilization of “smart” and targeted web-based marketing efforts
 - Increased utilization of social media in economic development marketing activities
- Regional and local branding initiatives
- Regional ambassador initiatives
- Marketing web site development and utilization of social media
- Joint marketing and coordination of scheduling

Goal #5: Collaborative Leadership – to encourage coordinated governance and rational and coordinated systemic investment in targeted economic development initiatives

28. Encourage community-level, county-level, and regional-level **comprehensive planning and strategic economic development planning**, develop and implement **community and economic development projects** consistent with those plans and with smart growth principles and sound environment principles, and create and appropriate **capital funds to implement projects.**



Potential Sponsors: County planning departments and economic development organizations, local governments, local/community development organizations, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Increased strategic comprehensive planning and economic development planning
- Increased strategic economic development project development and implementation
- Encouragement of preparation and readiness on the part of economic development project sponsors so as to achieve economic development success, including the following steps to achieve readiness:
 - Provision of technical assistance to potential and actual project sponsors to assist them with readiness for the development and implementation of economic development projects
 - Achievement of consensus and agreement amongst project participants as to individual organizational roles and responsibilities and commitments
 - Development of financial capital resources necessary to undertake economic development projects, e.g., capital reserve accounts, grantsmanship, provision for public-private partnering, etc.
 - Acquisition of appropriate land control (fee simple control or options on land proposed for subsequent development) as needed
 - Engagement of engineering and other consultants as appropriate and necessary to prepare preliminary engineering, to study soil conditions, archeological resources, flora and fauna issues, historical preservation issues, etc.
 - Obtain all appropriate and required regulatory permits (e.g., SEQRA, NEPA, SHPO / OPRHP, DEC, US Army Corps, US Fish and Wildlife, etc.)
 - Work with prospective beneficiary businesses to achieve consensus regarding shared expectations of each other's plans, and to obtain commitments from beneficiary businesses to implement their plans (investment, job creation, etc.) conditioned on any incentives or development initiatives promised by the project sponsor
- Grantsmanship to support implementation of planned economic development initiatives
- Initiatives to enhance partnership, collaboration, and coordination
- Create and capitalize capital funds or other funding mechanisms to implement projects



29. Improve coordination and collaboration between and among all levels of government as well as the private sector, including enhancing public-private partnerships, and make strategic investments that are aligned with and further regional priorities.

Potential Sponsors: County governments, county planning departments and economic development organizations, local governments, local/community development organizations, educational system, non-profit sector, private sector/business community, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Increased strategic comprehensive planning and economic development planning
- Increased strategic economic development project development and implementation
- Initiatives to enhance partnership, collaboration, and coordination
- Improvement, creation, and utilization of “civic spaces,” both physical and virtual, and other cornerstone community institutions
- Regionalized infrastructure services and intergovernmental shared services and promotion of centralization and regionalization of governance and municipal services as a means of reducing service delivery costs and improving services, including shared services initiatives, consolidation initiatives, multi-municipal infrastructure system initiatives, etc.
- Collaborations with the Seneca Nation of Indians to capture the potential of the Seneca Nation of Indians as a driver of economic development, and provide economic benefits to tribal members and non-tribal members
- Increased investment in business development / business assistance capacity, entrepreneurial development, and innovation
- Initiatives to enhance innovation with respect to government operations and increase operating efficiency of government operations
- Initiatives encouraging the direction of a greater percentage of anchor institutions’ and residents’ purchasing power toward local vendors based in the community
- Encourage anchor institutions to hire a greater percentage of their workforce locally.
- Encourage anchor institutions to provide workforce training for people needing assistance in the community.
- Encourage anchor institutions to incubate the development of new businesses, including social enterprise among nonprofits.
- Encourage anchor institutions to serve as advisors and network builders.
- Leverage real estate development to promote local retail, employer-assisted housing, and community land trusts.



30. Improve leadership training and enhance public involvement in coordinating decision-making and investments at the regional level.

Potential Sponsors: County governments, county planning departments and economic development organizations, local governments, local/community development organizations, educational system, non-profit sector, private sector/business community, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Leadership training and development initiatives
- Internships and mentoring programs
- Targeted technical assistance programs
- Initiatives to promote public access to and involvement in governmental and civic decision-making
- Initiatives to promote collaborative decision-making between parallel and vertical levels of government and organizations

31. Seneca Nation of Indians initiatives:

The Seneca Nation of Indians prepares its own CEDS document containing a specification of an economic development action plan, which is comprised of the economic development objectives, and for each objective, a specification of the responsibility for accomplishment, a timetable for accomplishing the objective, and funding opportunities. A recent version of the Seneca Nation of Indians CEDS was not available at the time of preparation of this CEDS. Interested readers of this CEDS are encouraged to contact the Seneca Nation of Indians to ascertain the Seneca nation of Indians’ portfolio of planned and potential strategic economic development initiatives.

32. Resilience Building Initiatives

Potential Sponsors: County governments, county planning departments and economic development organizations, county emergency management offices, local governments, local/community development organizations, private sector/business community, Seneca Nation of Indians, Southern Tier West RPDB

Potential Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Create county-level networks, which integrate emergency management personnel, economic development personnel, and other key stakeholders, to actively and regularly communicate and collaborate regarding proactive mitigation and post-disruption response



- Undertake appropriate infrastructure capital investment projects to mitigate potential disruptions due to natural disasters
- Diversify economy
- Upgrade labor force skills and job transferability
- Promote innovation, adoption of new technologies and productivity enhancement, and entrepreneurship
- Target development of emerging clusters
- Establish formalized mechanisms to realign and retrain local workforces post-disruption
- Increase recruitment of fire and emergency management service volunteers



Performance Measures

The implementation of CEDS Action Plan projects (i.e., when projects actually are commenced) can function as the evaluation framework for the CEDS. However, because timely implementation (commencement and completion) of projects often is a function of parameters outside the control of the project sponsor (example: unavailability of funds, affordability, etc.), there are inherent limitations in using the implementation of CEDS Action Plan projects to evaluate performance.

An alternate evaluation framework would be limited to projects actually commenced, and would involve measuring, at some defined term, say 3 or 5 years out from completion of the project, whether private sector investment expect to be induced, and/or jobs expected to be created, or other expected outputs (e.g., numbers of persons trained, etc.) actually have occurred.



CEDS Planning Process

The 2020 CEDS was a base year in the five-year CEDS planning cycle. The 2021 CEDS and 2021 CEDS are annual updates of the 2020 CEDS.

2020 CEDS Planning Process

In 2020, the base year for a new CEDS document, Southern Tier West had assembled a 2020 CEDS Strategy Committee, responsible for overseeing the development of the 2020 CEDS document, which included a diverse set of stakeholders (including the public sector, private interests, non-profits, educational institutions, and community organizations). The following persons were members of the 2020 CEDS Strategy Committee:

| <u>Name</u> | <u>Title</u> | <u>Organization</u> |
|---------------------|--------------------------|---|
| Crystal Abers | Director | Cattaraugus County Dept. of Econ Dev Planning and Tourism |
| Nathan Aldrich | Special Projects Coord. | Chautauqua County Division of Economic Development |
| Christopher Baker | Director | Cattaraugus County Emergency Services |
| Craig Clark | Director | Allegany County IDA and Dept of Econ Dev / Alfred State College |
| Charles Couture | Member | Cattaraugus County Farm Bureau Board |
| Courtney Curatolo | Director | Small Business Development Center |
| Kier Dirlam | Director | Allegany County Office of Planning |
| Rich Dixon | CFO | Chautauqua County Industrial Development Agency |
| Gregory Edwards | CEO | Gebbie Foundation |
| Joe Galati | Biologist (retired) | NYS Department of Environmental Conservation |
| Kathleen Geise | Executive Director | Chautauqua Works (WIB) |
| Mark Geise | Deputy County Executive | Chautauqua County DCE for Economic Development / CCIDA CEO / Director of the Department of Planning and Development |
| Jay Gould | Member | Chautauqua County Legislature |
| John Griffith | Director | Chautauqua County Emergency Services |
| Gretchen Hanchett | Executive Director | Greater Allegany Chamber of Commerce |
| Charles Jessup | Member | Southern Tier West Board |
| Amanda Joyce-Phelps | Director | Allegany County United Way |
| Robert Keis | Member | Southern Tier West Board |
| Keri Kerper | Com Dev Prog Coordinator | City of Olean |
| Carissa Knapp | County Administrator | Allegany County |
| Keith Kranick | Director | JCC Workforce Readiness (Olean) |
| Jeff Luckey | Director | Allegany County Emergency Management |
| Norm Marsh | Chairman | Cattaraugus County Legislature |



| | | |
|------------------|----------------------------|--|
| Don McCord | Director | Chautauqua County Division of Planning and Community Development |
| Jason Miller | Executive Director | Cattaraugus-Allegany WIB Inc. |
| Chris Napoleon | President | Napoleon Engineering Services |
| James Panebianco | Director | Olean Business Development Corporation |
| Timothy Piazza | Coordinator | Dream It Do It Chautauqua County / MAST |
| Max Pickard | Senior VP | Cattaraugus County Bank |
| Kristin Poppo | Provost | Alfred State College |
| Willie Rosas | Mayor | City of Dunkirk |
| Evelyn Sabina | Coordinator | Dream It Do It Cattaraugus County |
| Jerry Scott | Member | Southern Tier West Board |
| Marie Myers | Shearing Planner | Cattaraugus County Dept. of Econ Dev Planning and Tourism |
| Jeff Stager | Director, Bus/Com Dev | ACCORD Business and Community Development |
| Crystal Surdyk | Director of Development | City of Jamestown |
| Paul Wendel | County Executive | Chautauqua County |
| Lucille White | Director Com PI & Dev | Seneca Nation of Indians |
| Corey Wiktor | Director | Cattaraugus County Industrial Development Agency |
| Meme Yanetsko | Chief Operating Office | Greater Olean Area Chamber of Commerce |
| Rebecca Yanus | Director of Planning & Dev | City of Dunkirk |

Southern Tier West also had contacted the three county planning and development departments, the three county industrial development agencies, the planning and development departments of the three cities in the region, the workforce development agencies, the major cities, major development groups, and the general public, asking for participation in the development of the CEDS. The three county planning and development departments and the major cities were asked for a list of the currently planned economic development projects in their jurisdictions. The Southern Tier West Board also was asked for input during the revision process.

With respect to the EDA and WRC Project Lists:

- At its July 2020 Board meeting, the Southern Tier West Board adopted a resolution recognizing county-level priorities for EDA investment within their counties, and for EDA investment in regional projects. These priorities were informed by internal discussions within the individual counties, often via the county planning and development departments, industrial development agencies, county planning boards, and/or county planning and economic development committees. These EDA priority projects were listed in the 2020 CEDS.
- At its July 2020 Board meeting, the Southern Tier West Board prioritized projects for FY21 ARC funding. These ARC priority projects were listed in the 2020 CEDS.

As a consequence of the above planning process, the 2020 CEDS was revised in several ways:



- Revised format / structure
- Current demographic and economic data
- Revised descriptive narrative
- Updated SWOT analysis, resilience text, strategic text, and project lists

The draft 2020 CEDS was placed on the Southern Tier West web site in August 2020 for a 30-day public review and comment period, and the Southern Tier West Board approved a finalized version of the 2020 CEDS at its September 2020 Board meeting.

2021 and 2022 Planning Processes

In both 2021 and 2022, the Southern Tier West Board of Directors functioned as the CEDS Steering Committee. The Board was asked for input into the CEDS in both years. In the 2022 CEDS planning year, the Board also created a separate EDA/ARC Committee, which was to function to improve the implementation of the EDA and ARC programs, including the CEDS planning process.

As a consequence of the EDA/ARC Committee's considerations, the 2022 CEDS planning process began months earlier than usual practice, in January 2022.

In both 2021 and 2022, Southern Tier West had contacted the three county planning and development departments, the three county industrial development agencies, the planning and development departments of the three cities in the region, and the general public, asking for participation in the development of the CEDS. The three county planning and development departments and the major cities were asked for a list of the currently planned economic development projects in their jurisdictions.

In 2022, Southern Tier West used input from the CARES project, specifically related to resilience planning, to inform the 2022 CEDS document.

Relative to the 2021 CEDS, the 2022 CEDS update includes:

- Revised format / structure
- Updated demographic and economic data
- Revised descriptive narrative
- Revised resilience narrative
- Updated project lists

Similar to 2021, the draft 2022 CEDS was placed on the Southern Tier West web site in August 2022 for a 30-day public review and comment period, and the Southern Tier West Board approved a finalized version of the 2022 CEDS at its September 2022 Board meeting.

In succeeding years, as the region moves toward implementing the CEDS plan, the partnering organizations, as appropriate, will be involved in the implementation of the CEDS plan, often as project sponsors, and also as partners in the implementation of projects sponsored by other organizations. The commitment of these partnering organizations is important to coordinate project implementation, and to seek, obtain, and target project funding. Southern Tier West



also will engage these partnering organizations in monitoring progress on the CEDS and to keep the plan both current and relevant.



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Allegany County Comprehensive Plan 2030 – synopsis excerpts

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Action Areas

1. Economic Development

- Support our high-quality labor force
- Provide unmatched access to educational opportunities
- Attract regional, national, and international businesses that complement Allegany County's unique resources and advantages
- Market sites best suited for capital investment in Allegany County
- Invest in new businesses and growing businesses
- Strategically and consistently market Allegany County as a great place to visit, live, work, and start a business.

2. Community and rural character

- Maintain community and rural character of Allegany County
- Maintain and improve our agriculture, culture, natural resources, and historic aspects
- Foster economic security without compromising the quality of our living environment

3. Infrastructure

- Continued investment in infrastructure
- Change from economic sprawl to smart growth concepts

4. Government

- Continue to improve the overall cooperation of towns, villages and County government
- Encourage increased shared services

Economic Development Action Areas

1. Workforce Development

- **Workforce Development Goal:** Support and sustain high-quality educational opportunities, skills training programs, and professional groups that enhance Allegany County's labor market and quality of life.
- **Workforce Development Objectives:**
 - Support development projects at Alfred State College, Alfred University, and Houghton College, as higher education is a key driver of workforce development and economic development overall.
 - Increase awareness of skills training programs available to individuals and employers through Allegany County's Office of Employment and Training and Office of Development.



- Increase membership in the Allegany County Young Professional Group by 60% over the next five years.
- Build an entrepreneurial ecosystem by connecting the resources and agencies Allegany County already has in place.
- **Workforce Development Strategies:**
 - Consistently engage with higher education leaders from Alfred State College, Alfred University, and Houghton College through the Allegany County Economic Development Steering Committee.
 - Provide development assistance to Alfred State College, Alfred University, and Houghton College in the form of grant-writing and incentive support.
 - Facilitate connections between local businesses, prospective businesses, and the local colleges through the Office of Development to ensure employers' needs are being met and support the talent pipeline.
 - Continue to increase offerings of skills training programs available to individuals and employers.
 - Utilize public relations tactics, including press releases, email blasts, and social media, to raise awareness among target markets of available skills training opportunities.
 - Maintain relationships with individuals in leadership roles at major employers in Allegany County, including employers in higher education, manufacturing, and health services.
- **Support for Young Professionals:**
 - Encourage the continued growth of the Allegany County Young Professionals Group, through funding and staff support, as a means of attracting and maintaining a robust population of young people to fill job opportunities and replenish the tax base.
 - Convene an active governing board for the Allegany County Young Professionals Group that works cooperatively with internal supporting staff within the Office of Development and leaders from the three local colleges.
 - Continue to develop the Allegany County Young Professionals Group web-page located on the Allegany County website to include more relevant content and helpful links for new young professionals in the area.
 - Establish, and annually reevaluate, an Allegany County Young Professionals Group communication schedule which includes email blasts, social media content, and planned events.
 - Provide professional networking and professional development opportunities at events hosted by the Allegany County Young Professionals.
- **Support for Entrepreneurship:**
 - Increase the number of entrepreneur training opportunities available annually over the next five years to encourage a culture of entrepreneurship in Allegany County.
 - Add training opportunities that educate entrepreneurs and others on marketing and selling through online channels like Etsy, Amazon, and eBay.



- Support IncubatorWorks growth and investment in Allegany County and explore other opportunities for shared work spaces to aid entrepreneurial development and success.
- Work cooperatively with ACCORD, IncubatorWorks, Southern Tier West, and SCORE to provide training, support, and mentorship opportunities to entrepreneurs and start-ups.
- Promote opportunities to establish businesses that impact quality of life through displays at annual festivals that describe what economic development could look like in Allegany County.
- Work with Allegany County’s extensive network of artisans to expand their businesses.

2. Priority Industrial Market Segments and Business Sectors

- **Designated priority sectors**
 - Call Centers
 - Ceramics
 - Distribution
 - Metalworking
 - Packaging, including sustainable and renewable materials
 - Wood Products
 - Agri-Business
 - Higher Education
 - Retail
 - Tourism, including traditional destinations, events, and recreational
- **Priority Industrial Market Segments and Business Sectors Goal:** Increase the number of new businesses, retain existing businesses, and facilitate business expansion for companies within Allegany County’s target market segments.
- **Priority Industrial Market Segments and Business Sectors Objectives:**
 - Establish quantitative benchmarks for measuring success in retention, expansion, and addition of industries and businesses within Allegany County’s target market segments.
 - Establish quarterly communications with existing businesses in Allegany County to ensure retention and aid expansion.
 - Add Call Center operation (creating est. 80 jobs) to Allegany County by 2025.
 - Add new Metalworking operation (creating est. 50 - 200 jobs) to Allegany County in the next five years.
 - Increase number of start-ups in Allegany County by 20% over the next five years, particularly in ceramics, agri-business, retail, and tourism market segments.
 - Expand tourism economy by establishing, mapping, and marketing county-wide motorized and non-motorized multi-use trail systems over the next five years, which will include trails for hiking, biking, cross-country skiing, equestrian riding, ATV/UTV, and snowmobiles.



- **Priority Industrial Market Segments and Business Sectors Strategies:**
 - Create a series of measurable performance indicators to gauge success in retaining and expanding current businesses, and adding new businesses in Allegany County. Periodically review these measures and track performance.
 - Use email blasts, in-person meetings, and workshop events to maintain quarterly contact with existing businesses in Allegany County in order to address needs, overcome challenges, and plan for future success.
 - Build Allegany County’s overarching brand. Focus the brand messaging on Allegany County’s development strengths, including its wealth of skilled labor and access to high-quality workforce training at the collegiate level, nationally-competitive business costs and low cost of living, and proximity to a large industrial and consumer market. Use this positive brand image to develop a reputation for attracting business.
 - Prioritize key industrial markets as identified by the site selector firm. Produce white-paper documents, marketing print pieces, and microsites for each industry that emphasize Allegany County’s advantage within those market segments.
 - Focus on lead-generation within the key target industries through strategic digital marketing.
 - Formalize a marketing communications strategy that targets Allegany County’s identified target industries.
 - Develop a quarterly outreach strategy to communicate with site selectors, commercial real estate representatives, business executives, and other contacts within a targeted market or geographic area.
 - Maintain relationships with key players in lead generation and business attraction, including site selectors, Empire State Development, and Invest Buffalo Niagara.
 - Work with IncubatorWorks Alfred, ACCORD, the Small Business Development Center (SBDC), and SCORE to encourage entrepreneurial development particularly as it relates to the ceramics industry in Alfred, agri-business opportunities, and retail.

3. Development Sites and Communities

- **Designated development sites**
 - Vossler Road, Wellsville
 - Tracewell Building, Seneca Nation, Cuba
 - Old Airport, Wellsville
 - Crossroads Development Site, Belmont
 - Sugar Hill Industrial Park, Alfred
- **Designated development communities**
 - Alfred
 - Cuba
 - Friendship
 - Wellsville
- **Development Sites and Communities Goal:** Increase the number of new businesses and facilitate business expansion in prevailing sites and communities.



- **Development Sites & Communities Objectives:**
 - Actively market and secure tenants for prevailing sites and communities.
 - Obtain Shovel-Ready Certification for all prevailing sites and communities.
 - Secure investment for a shell-building.
- **Development Sites & Communities Strategies:**
 - Assist Allegany County villages and towns in continued improvement of their communities through planning, collaboration with the local colleges, and obtaining grant funding.
 - Assist Allegany County towns and villages in enacting local land use laws to maintain community character, protect air, soil, and water quality, protect local roads from overuse, and integrate noise and light ordinances.
 - Finalize site profiles for each of the prevailing sites, which includes general information, utilities information, and all other available documentation.
 - Gather information on each prevailing site and meet standards for characteristics and suitability traits, as well as complete all relevant studies and surveys, in order to pursue shovel-ready certification for all prevailing sites.
 - Begin information gathering to explore the possibility of developing a shovel-ready industrial park that includes a shell-building.
 - Work with Siemens Government Technologies to develop a plan for marketing the 380,000 sq. ft. manufacturing facility located in Wellsville.
 - Respond to site requests for information received from Invest Buffalo Niagara and other organizations.

4. Business Investment

- **Business Investment Goal:** Increase the number of new businesses in Allegany County, and retain and grow existing businesses, through facilitating diverse funding opportunities.
- **Business Investment Objectives:**
 - Increase annual investment in the Offices of Planning and Development to meet needs related to staffing, marketing, and business development.
 - Increase awareness of grants, incentives, and low-interest loans available to Allegany County businesses and entrepreneurs.
- **Business Investment Strategies:**
 - Cultivate support within the county government for Offices of Planning & Development staffing needs, marketing needs, and business development needs through market research data and strategic initiatives.
 - Actively partner with Allegany County businesses and developers to help them secure NYS grant funding and incentive benefits, PILOT agreements, low-interest loans, and other forms of funding.
 - Partner with Empire State Development and Southern Tier West to host an annual informational session on incentives, grants, and low-interest loans available to Allegany County businesses.



- Support the use of the newly-created Angel Fund that covers the Chautauqua, Cattaraugus, and Allegany region.
- Explore creating a microgrant program.
- Update Allegany County Incentives Guide as needed and continue to reach out to website visitors who download the guide through our website.

5. Marketing Communications

• Elements

- Marketing Communications plan
- Internal marketing communications capacity
- Effective marketing communications strategy to attract businesses
- Consistent branding
- Marketing communications campaign to attract new, young residents to the county
- Targeting young professionals (particularly alumni of our local colleges and “native” sons and daughters of Allegany County) and companies within specific industries (call centers, ceramics, distribution, metalworking, and packaging).
- Marketing tourism assets

- **Marketing Communications Goal:** Increase awareness among our target markets of Allegany County as a great place to visit, live, work, play, and start a business.

• Marketing Communications Objectives:

- Develop a county-wide brand and implement by 2020.
- Add 3,000 new, young residents to Allegany County over the next five years.
- Secure business investment in prioritized industries and sites.
- Increase revenue from tourism by 25% over the next five years.

• Marketing Communications Strategies:

- Partner with NY Welcomes You Inc. to pursue a county-wide branding strategy.
- Develop a strategic, comprehensive targeted marketing communications campaign aimed at enticing young professionals to return to Allegany County to live here, work here, or start their business here.
- Execute strategic marketing communications tactics including digital and social media marketing, advertising, public relations, and word of mouth based on resulting data from marketing research and strategy development.
- Curate a cohesive brand and position across all marketing communications platforms.
- Increase participation in the existing Allegany County Young Professionals Group through tactics like email marketing, event marketing, social media marketing, and strategic word of mouth.
- Create digital and print pieces that profile prioritized development sites.
- Create digital and print pieces promoting Allegany County within target industries, including call centers, ceramics, distribution, metalworking, packaging, wood products, agri-business, higher education, retail, and tourism.
- Update website to comply with International Economic Development Council (IEDC) standards.



- Invest in strategic advertising across platforms including digital signage, billboards, print, and radio.
- Develop video marketing tactics, including general branding promos, interviews with business owners who've experienced success in Allegany County, and virtual tours of Allegany County's prioritized sites.
- Focus on top three attractions (Tall Pines ATV Park, The Great Wellsville Balloon Rally, and the Genesee River) in tourism marketing communications messages.



Cattaraugus County Economic Strategic Plan 2022 – synopsis excerpts

<https://cattco.org/sites/default/files/edpt/Cattaraugus-County-Economic-Strategic-Plan-20220120-ver.20220224.pdf>

1. Recommended actions (page 7)

- Supporting skilled trades - develop an ambassadors program, develop skilled trades and manufacturing jobs collateral and video materials
- Promoting small business succession – develop webinars to support succession planning, business visitation to promote succession planning

2. Economic development issues and observations (pages 8 – 13)

- Long term shrinking population and labor force
- Aging population and workforce
- Need to train workforce for priority occupations with higher earning potential
 - Registered Nurses
 - Correctional Officers & Jailers
 - Industrial Machinery Mechanics
 - Tool and Die Makers
 - Licensed Practical and Licensed Vocational Nurses
 - Welders, Cutters, Solderers, and Brazers
 - Machinists
 - Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic
 - Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic
 - Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic
 - Grinding, Lapping, Polishing, Buffing Machine Tool Setters, Operators, Tenders, Metal Plastic
 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic
 - Personal Care Aides
- Increase utilization of existing educational institutions to train younger workforce for growth occupations providing higher wages
- The health care sector provides priority growth occupations.
- Tourism is a significant driver of the economy but offers relatively low-wage job opportunities.
- The metal and machinery manufacturing cluster is the only cluster with above average earnings potential. Other clusters with high location quotients employ small numbers of county residents and offer limited earnings potential.
- The fabricated metal product manufacturing subcluster is dominated by cutlery, utensil, pot and pan manufacturing. The machinery manufacturing subcluster is dominated by



air and gas compressor manufacturing. These two subclusters contain many of the priority occupations with high growth potential (e.g., industrial machinery mechanics, welders, machinists, etc.).

3. SWOT Analysis (Page 27)

- **Strengths**
 - Natural resources, open space, trails
 - Over 100 tourism attractions
 - \$240 million in direct tourism spending
 - Low cost of living compared to the state and USA
 - Dream It, Do It program
 - Existing educational institutions
 - Business-friendly climate and low local taxes
 - Metal and machinery manufacturing cluster as a significant traded cluster
 - Existing “capture” of retail sales in restaurants and other eating establishments
 - Agriculture is integral to the County’s identity
- **Weaknesses**
 - Little real income growth
 - Lower educational attainment levels
 - Lack of robust health care infrastructure
 - Relatively little new housing being constructed
 - 65% of vacant housing due to seasonal, recreational, or occasional use
 - Lack of adequate infrastructure (broadband connectivity, electricity, gas, and water/sewer along transport corridors, public transit to dedicated employment centers, road infrastructure to support tourism and agricultural industries along Amish Trail)
 - Lack of lodging near tourism and recreation attractions
- **Opportunities**
 - Destigmatization of skilled trades
 - Promote training of younger workforce to replace retiring workers in living wage jobs
 - Coordination of entrepreneurship initiatives between higher ed institutions and the County
 - CDBG funding programs for the rehab of housing for low income workers near business service areas
 - Repurposing underperforming shopping centers
 - Opportunities and funding sources are available to redevelop brownfields
 - Stronger cross-marketing and promotion of tourism and recreation assets
 - Synergies between tourism and agriculture
- **Threats**
 - Shrinking population
 - Aging population and workforce due to younger people moving away
 - Onerous state regulations, costing the County jobs and investment



- Loss of manufacturing jobs
- Lack of workers with soft skills
- Lack of succession plans among local businesses
- Poor coordination and/or communication between Seneca Nation and the County
- Climate change impacting weather-related tourism opportunities



Chautauqua County Economic Development Organization Plan (2022) – synopsis excerpts
<https://planningchautauqua.com/wp-content/uploads/2020/03/Report-Final-ChautauquaCountyOrganizationPlan22.pdf>

1. Important foci of economic development organizations (pages 8 and 9)

- **Business retention and expansion programs** - understand businesses’ needs, along with any barriers or issues that may impede growth, such as infrastructure, workforce, permitting, financing, etc. Many are utilizing a formal Customer Relationship Management (“CRM”) tool
- **New business attraction** - marketing and promotion of the community and sites - targeted to businesses that are within, or a part of, an existing supply chain or industry that has been identified as competitive relative to other regions. Investments in attraction efforts typically involve industry tradeshow attendance and/or conducting familiarization or developing relationships with site selectors.
- **Target industries and clusters** – identify clusters with competitive advantages - focus investments and capacity on strengthening those advantages - focus on strengthening existing industries and have analyzed economic and employment data to identify their targets
- **Entrepreneurship and innovation** - financing, training and other technical assistance and services to start-ups and existing entrepreneurs.
- **Workforce development** - develop training programs and career pathways that address specific gaps in labor skills. These programs typically focus on targeted industries.
- **Downtown infrastructure and sites** - Owning and developing property, business parks, or shovel-ready industrial sites, streamlining the permitting process, leading a downtown revitalization effort, completing an economic development strategy, or becoming involved in addressing a workforce housing shortage

2. Strengths and weaknesses (page 11)

Local stakeholders believe that Chautauqua County is strongest in interest, intellectual capital and infrastructure. Stakeholders also felt strongly that improving intellectual capital, investment, and infrastructure should be prioritized.

3. Key strategic findings regarding economic development needs (page 12)

- collaborative forum is needed
- improved communication amongst the stakeholders
- stakeholders should share data and resources
- forge stronger partnerships and build confidence
- creating and pledging to support a shared vision.
- Chautauqua County is stronger as a group
- commitment to focus energies
- establish priorities and proactive strategies.
- breakdown barriers for more cross-county collaboration
- develop an economic development strategy to target business growth, workforce, and quality of life opportunities



- leverage power through collective action
- take advantage of opportunities when they arise

4. Proposed Recommendations - Create a Proper Entity with New Identity (pages 13-18)

- Recommendation 1: Determine the proper entity to establish a new identity within the county that brings together public and private interests to address the economic challenges facing Chautauqua County.
- Recommendation 2: Adopt a vision statement that focuses on sustained countywide unity that brings out the best intentions and convictions for a more prosperous future.
- Recommendation 4: As a condition for serving on the board and/or committee(s) of [The Entity], each member must pledge to support its organizing principles and operating protocols.
- Recommendation 5: [The Entity] should operate as a nonprofit organization dedicated to carrying out its mission.
- Recommendation 6: An Ad Hoc Planning Committee should be established by the County Executive's Office and overseen by the Deputy County Executive for Economic Development to manage and organize [The Entity] in the formative stages.
- Recommendation 7: One of its first tasks will be to develop a Communications Plan to provide continuous, transparent information to stakeholders and interested third parties on its progress.
- Recommendation 8: [The Entity]'s Board of Directors should be comprised of business and civic leaders, philanthropic, academic and nonprofit executives, along with public sector officials.
- Recommendation 9: The board should be led by two equal co-chairs that include the County Executive and either a CEO of a county-based business or a chief executive of a local philanthropic foundation. The second co-chair position is intended to be a person who is not involved in providing day-to-day programmatic services but rather represents business or broader civic leadership.
- Recommendation 10: The board should form standing committees as follows: Nominations, Finance, Policy and Programs, Public Advisory. An Executive Committee of 7 individuals should be selected to include the 2 co-chairs, chairs of the 4 standing committees, and one at-large member. At least 4 of the executive committee members should represent the business community.
- Recommendation 11: A Public Advisory Committee of the Board of Directors should be formed to be comprised of local elected and appointed officials who will provide input to [The Entity] on issues of concern to municipal jurisdictions.
- Recommendation 12: Initially, a full-time staff person should be employed to coordinate the activities of the Board and to facilitate the activities of the organization. In addition, a recognized leader in economic development should serve as Executive Director to be the public facing executive to represent the interests of the [The Entity]. The organization should seek to ultimately have several full-time employees (apart from the Executive Director): a Program Director; an Operations Manager; and a Program and Policy Assistant.
- Recommendation 13: Secure commitments to fund the first three years



- Recommendation 14: The Finance Committee should develop recommendations for establishing a dedicated revenue stream as a supplement to member contributions to finance operating expenses after the start-up phase is complete.



State of the Region: WNYREDC 2021 Annual Report – synopsis excerpts

<https://regionalcouncils.ny.gov/sites/default/files/2021-07/WNYREDCAnnualReport2021.pdf>

1. Sector strategies to drive economic growth include:

- Implementing smart growth
- Fostering a culture of entrepreneurship
- Preparing our workforce
- Supporting research and competitiveness in advanced manufacturing
- Stimulating growth in the health and life sciences industry
- Facilitating the growth of quality tourism product.

2. New Strategies

- **Technology**
 - Upskill local residents, retain local college graduates with relevant degrees and attract alumni and expats to help fill WNY’s tech talent pipeline.
 - Attract and retain tech companies through ecosystem building and regional promotion.
 - Invest in infrastructure that supports tech companies and tech jobs across industries.
- **Sustainability**
 - Continue to encourage smart growth planning and climate change policy frameworks to maximize spatial efficiency, conserve resources and make local communities more resilient.
 - Increase energy efficiency in building stock and building systems.
 - Transform our transportation infrastructure.
 - Set the stage for renewables to flourish and encourage transition to renewables in line with the state goals.
 - Assess the impact of sustainability policy and programs to ensure equitable outcomes for all individuals and communities.



Southern Tier West Resilience and Recovery Plan – synopsis excerpts

Available from Southern Tier West

Pandemic recovery strategies that would better position the region for the post-pandemic world and also make the region more resilient should a similar event be confronted in the future, include the following:

1. Accelerate the development of broadband availability.
2. Expand the reserve capacity of (social and human) service organizations in order to quickly and efficiently expand in times of crisis.
3. Recruit workers to the region by promoting the area’s higher standard of living and rural recreational opportunities, including remote workers employed in other places who can work from afar.

Broadband availability opens the opportunity for remote work and learning, which could better position the region to recruit remote workers from other locales.

As service organizations expand their capacity, a larger talent pool of recruits would be necessary. This likely would require (a) workers from other locales outside the region and (b) promoting the region to young regional residents aging into the workforce—many of whom currently decide to leave the region for education and employment.



Southern Tier West Regional Planning and Development Board

Board of Directors

As of September 2022, the members of the Southern Tier West Board of Directors are as follows:

| <u>Name</u> | <u>Representing</u> |
|-----------------|--------------------------|
| Craig Clark | Allegany County |
| Kier Dirlam | Allegany County |
| Charles Jessup | Allegany County |
| Deb Root | Allegany County |
| Jerry Scott | Allegany County |
| Crystal Abers | Cattaraugus County |
| Don Benson | Cattaraugus County |
| Charles Couture | Cattaraugus County |
| Robert Keis | Cattaraugus County |
| Norm Marsh | Cattaraugus County |
| Thomas Harmon | Chautauqua County |
| Don McCord | Chautauqua County |
| Willie Rosas | Chautauqua County |
| Paul Wendel Jr. | Chautauqua County |
| Rebecca Wurster | Chautauqua County |
| Lucille White | Seneca Nation of Indians |

As of September 2022, the officers of the Southern Tier West Board of Directors are as follows:

| <u>Name</u> | <u>Representing</u> | <u>Title of Officers</u> |
|-------------|---------------------|--------------------------|
| Kier Dirlam | Allegany County | Chairperson |
| Don McCord | Chautauqua County | Vice Chairperson |
| Robert Keis | Cattaraugus County | Secretary |



Seneca Nation of Indians CEDS Plan Excerpts

The following information is excerpted from a Seneca Nation of Indians PowerPoint presentation entitled “Comprehensive Economic Development Strategy (CEDS) 2019-2024 Strategic Direction/Action Plan.”

CEDS Vision Statement

“To develop and promote; a culturally, healthy and economically sustainable Seneca Community for 7 Generations”

CEDS Strategic Directions

Areas emphasized within the CEDS Strategic Direction/Action Plan are:

- A. Culture
- B. Community - Quality of Life
- C. Education and Workforce
- D. Infrastructure
- E. Economic Development

A. Culture

GOAL: “Preserve, Promote, and Protect Seneca Culture (Language, Arts, Traditions): Teach and raise awareness of Seneca Culture”

OBJECTIVES:

1. Raise the number of fluent Seneca speakers
2. Properly promote and share Haudenosaunee culture
3. Document and Preserve language and culture
4. Help the community to live a cultural life
5. Capitalize on the rich Seneca culture to draw tourism

ACTION PLAN:

Culture and heritage are the cornerstones of the Seneca people. Focus on preserving traditional language, sharing its rich culture, and attracting new visitors and investors through cultural tourism and development.



B. Quality of Life, Community and Health

GOAL: “Increase the physical, spiritual, social, and economic well-being of the Seneca community to the highest level possible”

OBJECTIVES:

1. Invest in Land – expand land base
2. Improve/increase walkability and recreational opportunities
3. Restore food and resource sovereignty and protection
4. Get Back to Our Roots (traditional mindset – community driven)
 - a. Invest in the people
 - b. Healthy people = Healthy Nation
5. Assess the loss of local hospitals near the territories and consider replacement near the territories

ACTION PLAN:

The Seneca Nation will improve the well-being of the community through the expansion of programs, services, and social opportunities that will continue to address a multitude of needs and promote wellness.

C. Education and Workforce Development

GOAL: “Develop a diverse skills workforce and professional base by establishing the highest level of standards for education and experienced professionals”

OBJECTIVES:

1. Increase graduation rates by supporting parents and children through graduation
2. Help K-12 focus on improving school readiness skills and enrichment
3. Share/promote diverse post graduate opportunities (Military, Trade school, Jr. College, University)
4. Retain skilled professionals: (Keep those who have obtained their higher education and developed their skills on Territory)
5. Train and continuously train current staff
6. Hire and retain qualified staff
7. Career Education and Financial Literacy

ACTION PLAN:

The Seneca Nation will improve academic outcomes by providing incentives, numerous educational opportunities and avenues to increase high school and college graduations rates.



D. Infrastructure Improvements

GOAL: “Build and maintain infrastructure that sustains and enhances the community for economic development”

OBJECTIVES:

1. Assess current infrastructure capacity and Identify gaps
2. Expand pedestrian facilities (Transit Stops, Crosswalks, Walkways, Street Furniture, etc.)
3. Increase Green/Sustainable energy resources (Wind, Solar, Hydro)
4. Have wastewater treatment infrastructure that meets current capacity and potential for future growth
5. Establish full broadband access to everyone across the Territory
6. Establish the ability to enforce Nation laws/ traffic fines remain on Territory
7. Adopt a plan for proper Land Use
8. Improve conditions and safety of transportation infrastructure
9. Capitalize on interstate and thruway traffic for economic development
10. Expand railways to allow for public transportation and excursions
11. Expand Natural Gas Infrastructure
12. Increase Street/Road Lighting

ACTION PLAN:

The Seneca Nation aims to improve the quality of life and promote economic development opportunities through modern and highly maintained utility infrastructure and transportation networks.

E. Economic Development

GOAL: Develop a sustainable, diverse, growing economy that encourages entrepreneurship and investment in the Seneca Nation.

OBJECTIVES:

1. Develop a Strategic Economic Plan for the SNI City of Salamanca in cooperation with the Seneca Nation
2. Friendly Neighbors – the Seneca Nation will conduct urban and regional economic development activities in areas surrounding it gaming facilities throughout WNY
3. Increase tourism - develop tourism plan with new attractions
4. Diversify the Seneca Nation economy
5. Help promote and defend private business owners
6. Build up the Nation’s natural resources to provide for new economic opportunities



7. Create a recreational development plan with new opportunities
8. Capitalize on the available infrastructure and resources (Railroad, Thruway/Interstates, Great Lakes)
9. Create and sustain valuable partnerships with other agencies, municipalities, and stakeholders
10. Revitalize historic Main Street in the City of Salamanca
11. Develop minority business training center
12. Improve Short and Long term planning by developing a Seneca Nation Masterplan
 - a. Adopt Smart Growth policies
 - b. Re-establish Planning Commission.

ACTION PLAN:

The Seneca Nation aims to sustain and grow the local economy, through a multifaceted approach to economic development. With culture and sovereignty as the cornerstone for economic growth, the Seneca Nation will increase its recreation and tourism potential, improve local partnerships, and diversify its economic portfolio by capitalizing on all available social and natural resources.

Economic Resiliency

- Regional economic prosperity is heavily linked to an areas ability to prevent, withstand, and quickly recover from major disruptions (i.e., shocks) to its economic base.
 - 1) The ability to recover,
 - 2) The ability to withstand a shock, and
 - 3) The ability to avoid the shock altogether.
- A key to economic resilience is maintaining the geographic information systems (GIS) necessary that link with municipal business licenses, demographic information, and other business establishment data bases to track local and regional development sites.
- Through the SNI business programs and promoting better businesses continually:
 - 1) Businesses will understand their vulnerabilities
 - 2) So they are prepared to take actions to resume operations after an event.
- The Seneca Nation Emergency Management Department serves the citizens of the Seneca Nation through effective preparedness exercises and proper planning for natural and man-made disasters.