



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

2021 Southern Tier West Region

Comprehensive Economic Development Strategy

2021 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

The **Southern Tier West Regional Planning and Development Board ("Southern Tier West")** is a regional planning council, a unit of government created pursuant to New York State General Municipal Law section 239-h. Southern Tier West was designated an Economic Development District (EDD) by the U.S. Department of Commerce Economic Development Administration ("EDA") in 1977. The functions of the EDD include, but are not limited to, preparing and maintaining a Comprehensive Economic Development Strategy ("CEDS"), assisting in the implementation strategies identified in the CEDS, and providing technical assistance to Economic Development Organizations throughout New York State's Southern Tier West Region (Allegany, Cattaraugus, and Chautauqua Counties). These three counties, as members of the Southern Tier West EDD, are designated by EDA as redevelopment areas and are eligible for financial assistance from EDA for eligible and appropriate economic development projects. This EDA funding eligibility also extends to the municipalities, economic development entities, and non-profit organizations located within these counties.

This **2021 Comprehensive Economic Development Strategy ("2021 CEDS")** is a strategic plan for economic development for New York State's Southern Tier West Region, prepared and published by Southern Tier West. The prior year CEDS document (the "2020 CEDS") was developed by the Southern Tier West CEDS Strategy Committee, which was comprised of a broad range of public sector, regional economic development, business, civic, education and workforce development professionals. The 2021 CEDS is an update of the 2020 CEDS, reflecting newly available data, current economic development strategies, and current economic development projects and initiatives.

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. Additionally, through their inclusion in the CEDS, and their identification by Southern Tier West as priority economic development projects for funding by EDA, economic development projects in the Southern Tier West region qualify for grant funding from EDA.

Southern Tier West annually prepares the CEDS per a contract with EDA. EDA has specific requirements for the CEDS planning process, document format, and document content. The 2020 and 2021 CEDS were prepared through a comprehensive planning process per EDA CEDS requirements, and conforms to EDA's requirements.

Impact of Coronavirus Pandemic Economic Downturn on CEDS Planning Process

When Southern Tier West began the planning process for the creation of the 2020 CEDS, the USA was just heading into the coronavirus pandemic, with the associated economic downturn that was experienced by the entire nation. Like the nation, the region desires to implement economic strategies that will result in economic recovery. These strategies, and the activities and initiatives that flow from these strategies, normally would be the province of a CEDS. However, in 2020, several issues presented themselves. First, data describing the impact of the downturn were not yet available during the 2020 CEDS planning process, as even seasonally unadjusted data lag the actual downturn, and agencies that normally provide data seemed to be behind in their work processes because of the pandemic. Second, the downturn was ongoing during the 2020 CEDS planning process, and the severity and impacts of it were not yet fully known. Third, the business and economic development community were not up to speed as to what the optimum responses might be to the downturn. Fourth, federal and state responses and programming were still in the process of being developed; in many if not most cases, these federal and state programmatic resources would represent the financial wherewithal that would permit economic recovery strategies to be implemented. Because of these issues, the 2020 CEDS primarily was prepared using data available and economic development strategies available during the 2020 CEDS planning period. As such, it was a fairly traditional CEDS document, with very little pandemic recovery strategies included therein.



Nonetheless, there were several regional response initiatives underway in 2020. Regional small business revolving loan funds operated by the Chautauqua County Industrial Development Agency and the Southern Tier Enterprise Development Organization had secured federal approval for revising their local fund operating rules so as to be more flexible regarding accessibility and usability of their loan funds by businesses that had been negatively impacted by the coronavirus downturn.

Additionally, both Southern Tier West and the Southern Tier Enterprise Development Organization received additional federal EDA funds as part of the region's economic response to the pandemic dislocation. Southern Tier West's intention was to use these funds for (a) the development of an economic recovery and resilience plan, tied to the CEDS, that will address the economic impacts of the coronavirus pandemic, (b) the provision of technical assistance, as necessary, to local governments, businesses, and other stakeholder organizations, and (c) the funding of appropriate technology and staff support for these pandemic-response activities. The Southern Tier Enterprise Development Organization intended to use the requested EDA funds for additional small business loan funds. Both the Southern Tier West and STEDO initiatives began in the summer of 2020, with STEDO loans becoming available immediately upon award in 2020.

In 2021, the CEDS planning process has been somewhat simplified, as the CEDS is a simple update. However, in 2021, more annualized data is available, an understanding of pandemic-induced economic dislocation is in hand, and federal, state, and local response initiatives either are in place, or are in the process of being developed and/or implemented. Accordingly, there is more content in the 2021 CEDS related to pandemic recovery.

Additional priority response projects will be listed in this and future CEDS documents as they are developed. Southern Tier West's economic recovery and resilience plan also will result in additional response initiatives, which will be listed as high priority projects in updated versions of this CEDS, as well as in subsequent CEDS documents.

Executive Summary

For decades, the rural three-county Southern Tier West region, located in southwestern New York State at the northern tip of the historically economically distressed Appalachian region, has experienced economic distress that very often has exceeded that of either the State or the nation as a whole. In recent decades, regional unemployment rates often have exceeded State and national unemployment rates; regional per capita income levels often have been significantly below State and national per capita income levels; regional per capita income levels often have failed to keep pace with inflation; and businesses and residents have emigrated from the region.

The nation's economy continues to recover from a recession. The Southern Tier West region's economy also has experienced a revival of its economy of sorts, but our region nonetheless continues to be more economically depressed than the State and the nation as a whole. Our region continues to experience economic dislocation in the form of business closures, business departures (often of non-locally owned plants), layoffs, unemployment, and population outmigration. In recent years, the largest manufacturing concerns in both Allegany and Cattaraugus Counties have closed. 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 regain and 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. Our region, like the nation as a whole, 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 its standard of living, our region must 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. 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.

Traditional economic development strategies generally fall into one of two camps: needs-based economic development or asset-based economic development. Needs-based economic development focuses on identifying gaps and deficiencies in the local economy and attracting new investment or industries to fill those gaps. Needs-based economic development can be more sensitive to the boom-and-bust cycle or to changes in State or federal policy environments, is often extremely sensitive to the ability to attract market-based operations and customers, and as a consequence, is a strategy that often will have a lower probability of success. In contrast, asset-based economic development builds on existing local resources (“assets”) to strengthen the regional economy. Asset-based economic development typically (1) is easier to motivate, (2) is a higher-probability-of-success type of strategy, and (3) is more likely to result in long-term sustained economic growth. **This CEDS essentially is primarily an asset-based economic development strategy.**

Fortunately, our region has a number of significant economic and human resource assets that form the foundation for our current regional economy and can be utilized to achieve sustainable and globally competitive economic development. It is essential that, at the regional, county, and local levels, our region builds upon these assets to capture opportunities that are available.

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.

This CEDS document uses data-driven analytical techniques to inform its SWOT analysis, to evaluate the region’s capacity for innovation, to identify significant target industry clusters, to identify significant target occupational clusters, and to discuss the development of strategies and projects based on these analytical results.

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.

The result is the following **CEDS strategic foci**:

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*

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. This paradigm shift should result in:

- The conceptualization and implementation of higher-impact economic development projects and programs.
- 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.

It will be a challenge in our rural, economically challenged region, which often must limit the expenditure of its financial resources to essential services, programs, and initiatives, to bring about an evolution of the region's economic development paradigm. Future returns from building economic development capacity initially may not seem as guaranteed or even as intuitive as a case-by-case development focus on immediate opportunities. However, it is Southern Tier West's hope that this CEDS will encourage an ongoing regional dialogue that will result in a shared consensus that capacity building is essential to the region's economic future. As this vision becomes more generally accepted and incorporated into our regional strategy, our region will become a national leader in making progress toward becoming a rural region with a healthy, competitive, and sustainable economy.

In developing this CEDS, Southern Tier West is pleased to play a coordinating and catalyzing role in helping to guide the region's future.

- September 2021

Southern Tier West Regional Planning and Development Board

H. Kier Dirlam, Chairman

Richard Zink, Executive Director

Thomas Barnes, Senior Regional Economic Development Coordinator



Summary Background

Summary description of the current economic development situation of the Southern Tier West region of New York State (Chautauqua, Cattaraugus, and Allegany Counties), comprised of the northern-most counties in the federally designated Appalachia region. The region's economic situation is consistent with this designation.

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**.

Population Over Time

	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>	<u>New York</u>	<u>United States</u>
2020	45,587	75,863	126,032	19,336,776	331,449,281
2018	46,430	76,840	127,939	19,542,209	327,167,434
2010	48,946	80,317	134,905	19,378,105	308,745,538
2000	49,927	83,955	139,750	18,976,457	281,421,906
1990	50,470	84,234	141,895	17,990,778	248,790,925
1980	51,742	85,697	146,925	17,558,165	226,542,250
2018 to 2020 changes	-1.8%	-1.3%	-1.5%	-1.1%	1.3%
2000 to 2020 changes	-8.7%	-9.6%	-9.8%	1.9%	17.8%
2000 to 2010 % change	-2.0%	-4.3%	-3.5%	2.1%	9.7%
1990 to 2010 % change	-3.0%	-4.7%	-4.9%	7.7%	24.1%
1980 to 2010 % change	-5.4%	-6.3%	-8.2%	10.4%	36.3%

Source: U.S. Census Bureau (www.statsamerica.org)

Population Change in Urban Centers

	<u>1990</u>	<u>2000</u>	<u>2010</u>	<u>2019</u>	<u>Total Change</u>	<u>Percentage Change</u>
City of Jamestown	34,681	31,730	31,146	29,775	-4,096	-14.1%
City of Olean	16,946	15,347	14,452	13,670	-3,276	-19.3%
City of Salamanca	6,566	6,097	5,815	5,497	-1,069	-16.3%
City of Dunkirk/ Village of Fredonia	24,425	23,837	23,793	22,329	-2,096	-8.6%
Town and Village of Wellsville	8,115	7,678	7,397	7,016	-1,099	-13.5%

Source: U.S. Census Bureau (1990, 2000, 2010 Census; 2019 Census Estimate) (www.statsamerica.org)



Population Estimates by Age in 2019

Age Group	Allegany County			Cattaraugus County			Chautauqua County		
	Number	Pct Dist	Pct Dist. in USA	Number	Pct Dist	Pct Dist. in USA	Number	Pct Dist	Pct Dist. in USA
Preschool (0 to 4)	2,408	5.2%	6.1%	4,399	5.7%	6.1%	7,006	5.4%	6.1%
School Age (5 to 17)	7,033	15.1%	16.5%	12,785	16.6%	16.5%	19,317	15.0%	16.5%
College Age (18 to 24)	7,209	15.4%	9.4%	7,088	9.2%	9.4%	12,659	9.9%	9.4%
Young Adult (25 to 44)	9,318	20.0%	26.5%	16,677	21.6%	26.5%	28,554	22.2%	26.5%
Older Adult (45 to 64)	12,124	26.0%	25.8%	21,745	28.2%	25.8%	35,806	27.9%	25.8%
Older (65 plus)	8,596	18.4%	15.6%	14,427	18.7%	15.6%	25,157	19.6%	15.6%
Median Age	39.1		38.1	42.0		38.1	42.6		38.1

Source: U.S. Census Bureau (www.statsamerica.org)

Dependent Population as a Percent of Total Population, 2019

(ages 0 to 17 and 65+)

Allegany County	38.7%
Cattaraugus County	41.0%
Chautauqua County	40.0%
New York State	36.1%
USA	38.2%

Source: U.S. Census Bureau (www.statsamerica.org)

Population Estimates by Race and Hispanic Origin, 2019

Race / Origin	Allegany County			Cattaraugus County			Chautauqua County		
	Number	Pct Dist.	Pct Dist. in U.S.	Number	Pct Dist.	Pct Dist. in U.S.	Number	Pct Dist.	Pct Dist. in U.S.
Total Population	46,472			76,651			125,653		
White Alone	44,565	95.5%	72.5%	70,859	91.9%	72.5%	118,515	92.2%	72.5%
Black Alone	700	1.2%	12.7%	1,116	1.4%	12.7%	3,338	2.6%	12.7%
Asian Alone	548	1.3%	5.5%	610	0.8%	5.5%	723	0.6%	5.5%
American Ind. or Alaskan Native Alone	107	0.2%	0.8%	2,485	3.2%	0.8%	410	0.3%	0.8%
Native Hawaiian and Other Pac. Isl. Alone	15	0.0%	0.2%	0	0.0%	0.2%	82	0.1%	0.2%
Two or More Race Groups	537	1.2%	3.3%	1,581	2.1%	3.3%	2,585	2.0%	3.3%

Source: U.S. Census Bureau (www.statsamerica.org)



Hispanic or Latino (can be of any race), 2019

	Allegany County			Cattaraugus County			Chautauqua County		
	Number	Pct Dist.	Pct Dist. in U.S.	Number	Pct Dist.	Pct Dist. in U.S.	Number	Pct Dist.	Pct Dist. in U.S.
Hispanic or Latino	761	N/A	N/A	1,620	2.1%	18.0%	9,608	N/A	N/A
Non-Hispanic or Latino	44,975	N/A	N/A	75,501	97.9%	82.0%	112,354	N/A	N/A

Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates (www.statsamerica.org)

Minority Population as Percent of Total Population, 2019

Allegany County	4.5%
Cattaraugus County	8.1%
Chautauqua County	7.8%
New York State	36.3%
USA	27.5%

Source: U.S. Census Bureau (www.statsamerica.org)

Labor Force

- A long term decrease in the regional **labor force size**, especially since 2010, in contrast to increasing State and national labor forces (with an allowance for pandemic-related decreases in recent years). The pandemic also created a significant decrease in the size of the region’s labor force.
- 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 high-skill labor force to the region.
- **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).



Labor Force Average Annual Figures for the Population Aged 16 Years and Older

Year	Allegany County	Cattaraugus County	Chautauqua County	STW Region	New York	United States
1990	22,400	39,000	68,100	131,490	8,808,900	125,840,000
1995	23,200	39,700	67,600	130,500	8,676,800	132,304,000
2000	22,800	41,100	68,100	131,500	9,167,000	142,583,000
2005	23,600	42,200	67,200	132,500	9,421,400	149,320,000
2010	24,200	39,700	63,900	130,300	9,595,400	153,889,000
2015	20,500	35,400	57,900	113,500	9,644,600	157,130,000
2017	19,900	34,700	55,900	110,500	9,704,700	160,320,000
2020	19,038	33,142	55,729	107,909	9,289,171	160,742,000
% Change, 1990-2020	-15.0%	-15.0%	-18.2%	-17.9%	5.5%	27.7%
% Change, 2010-2020	-21.3%	-16.5%	-12.8%	-17.2%	-3.2%	4.5%
% Change, 2015-2020	-7.1%	-6.4%	-3.7%	-4.9%	-3.7%	2.3%
% Change, 2017-2020	-4.3%	-4.5%	-0.3%	-2.3%	-4.3%	0.3%

Source: NYS Department of Labor; U.S. data is from the U.S. Bureau of Labor Statistics

Labor Force

County	2010	2020	Net Change
Allegany County	24,200	19,038	- 5,162
Cattaraugus County	39,700	33,142	- 6,558
Chautauqua County	63,900	55,729	- 8,171

Source: NYS Department of Labor



Age of Labor Force

	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>	<u>New York</u>	<u>USA</u>
16 to 19 years	3.24%	2.3%	2.6%	2.9%	2.5%
20 to 21 years	3.8%	2.2%	2.4%	2.0%	2.4%
22 to 24 years	3.4%	3.4%	3.4%	3.8%	4.0%
25 to 29 years	5.1%	5.6%	5.4%	7.7%	7.4%
30 to 34 years	5.0%	5.6%	5.3%	7.3%	7.0%
35 to 44 years	9.7%	10.9%	10.1%	12.7%	13.1%
45 to 54 years	10.9%	12.7%	12.1%	13.3%	13.1%
55 to 59 years	5.5%	6.6%	6.7%	6.2%	6.0%
60 to 61 years	2.1%	2.3%	2.5%	2.2%	2.1%
62 to 64 years	2.3%	2.5%	2.4%	2.4%	2.3%
65 to 69 years	2.3%	2.0%	2.1%	2.1%	2.1%
70 to 74 years	0.8%	0.8%	0.5%	0.6%	0.6%
75 years +	0.6%	0.8%	0.5%	0.6%	0.6%

Source: Base data from U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates;
Percentage calculations by Southern Tier West

Educational Attainment of Labor Force

	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>	<u>New York</u>	<u>USA</u>
Labor Force	21,442	38,422	64,360	10,485,631	169,838,280
Less than high school graduate	831	1,771	3,256	713,771	11,256,318
High school graduate (includes equivalency)	5,194	10,404	14,735	1,848,246	31,612,254
Some college or associates	5,964	9,948	16,640	2,113,961	40,216,178
Bachelor's degree or higher	3,642	6,462	12,382	3,586,630	49,369,353
Less than high school graduate	3.9%	4.6%	5.1%	6.8%	6.6%
High school graduate (includes equivalency)	24.2%	27.1%	22.9%	17.6%	18.6%
Some college or associates	27.8%	25.9%	25.9%	20.2%	23.7%
Bachelor's degree or higher	17.0%	16.8%	19.2%	34.2%	29.1%

Data: Population 25 to 64 years

Source: U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates;
percentage calculations by Southern Tier West



Employment / Unemployment

- **Long term:** Since 2000, **regional employment** has been decreasing, in contrast to increasing employment at the State and national levels (exception: both the State and national employment levels also decreased in 2020, due to the pandemic).
- **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, with the US Bureau of Labor Statistics indicating that all three counties experienced a decrease in employment, while the NYS Department of Labor indicates that Allegany County experienced an increase in employment). Also, between 2019 and 2020, **regional unemployment** decreased significantly, as did the **size of the labor force** in all three counties. (Again, the NYS Department of Labor indicates that Allegany County experienced an increase in its labor force.)
- The region’s **unemployment rate** often has exceeded the unemployment rate of both the State and nation, and this has been uniformly true since 2012, until the pandemic in 2020. In 2020, 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. In fact, Chautauqua County’s unemployment rate in 2020 exceeded the national rate.
- 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.
- The **2020 coronavirus pandemic economic downturn** resulted in a decrease in the region’s labor force and a substantial amount of additional unemployment.

Unemployment Rates (Summary)

	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2015</u>	<u>2019</u>	<u>2020</u>
Allegany County	6.5%	7.7%	4.9%	5.9%	9.2%	6.5%	5.1%	6.5%
Cattaraugus County	6.3%	7.6%	4.5%	5.4%	9.5%	6.3%	5.5%	6.0%
Chautauqua County	5.7%	5.9%	4.0%	4.9%	8.9%	6.0%	4.3%	8.9%
New York State	5.3%	6.4%	4.5%	5.0%	8.60%	5.3%	3.4%	14.8%
United States	5.6%	5.6%	4.0%	5.1%	9.6%	5.3%	3.7%	8.1%

Source: NYS Department of Labor; U.S. data is from the U.S. Bureau of Labor Statistics



**Labor Force, Employment, Unemployment, and Unemployment Rate
(Average Annual Figures for the Population Aged 16 Years and Older)**

	<u>2010</u>	<u>2015</u>	<u>2019</u>	<u>2020</u>	<u>% Change, 2019-2020</u>
Allegany County					
Labor Force	24,200	20,500	18,300	19,500	6.6%
Employed	22,000	19,100	17,400	18,200	4.6%
Unemployed	2,200	1,300	900	1,300	44.4%
Unemployment Rate (%)	9.2%	6.5%	5.1%	6.5%	27.4%
% of Regional Labor Force	18.9%	18.0%	17.3%	18.4%	-6.7%
Cattaraugus County					
Labor Force	39,700	35,400	33,300	33,100	-0.6%
Employed	35,900	33,200	31,900	31,100	-2.5%
Unemployed	3,800	2,200	1,900	2,000	5.3%
Unemployment Rate (%)	9.5%	6.3%	5.5%	6.0%	9.1%
% of Regional Labor Force	31.1%	31.1%	31.4%	31.3%	-0.5%
Chautauqua County					
Labor Force	63,900	57,900	54,400	53,300	-2.0%
Employed	58,300	54,400	52,000	48,600	-6.5%
Unemployed	5,700	3,500	2,400	4,700	95.8%
Unemployment Rate (%)	8.9%	6.0%	4.3%	8.9%	107.0%
% of Regional Labor Force	50.0%	50.9%	51.3%	50.3%	-1.9%
Southern Tier West Region					
Labor Force	130,300	113,500	110,500	108,500	-0.9%
Employed	118,700	106,500	103,500	102,800	-3.4%
Unemployed	11,700	7,000	6,900	5,700	53.9%
Unemployment Rate (%)	9.2%	6.2%	6.2%	5.3%	53.8%
New York State					
Labor Force	9,595,400	9,644,600	9,483,200	9,462,400	-0.2%
Employed	8,769,700	9,136,200	9,159,000	8,062,300	-12.0%
Unemployed	825,600	508,500	324,200	1,400,100	331.9%
Unemployment Rate (%)	8.60%	5.3%	3.4%	14.8%	335.3%
United States					
Civilian Labor Force	153,889,000	157,130,000	163,539,000	160,742,000	-1.7%
Employed	139,064,000	148,834,000	157,538,000	147,795,000	-6.2%
Unemployed	14,825,000	8,296,000	6,001,000	12,947,000	115.8%
Unemployment Rate (%)	9.6%	5.3%	3.7%	8.1%	118.9%

Source: NYS Department of Labor; U.S. data is from the U.S. Bureau of Labor Statistics



Total Annual Employment by County

<u>Year</u>	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>
2010	13,665	30,445	51,575
2011	13,450	30,128	51,129
2012	13,502	29,814	50,698
2013	13,333	29,773	49,958
2014	13,688	29,639	49,738
2015	13,681	29,368	49,941
2016	13,531	29,557	49,061
2017	13,337	29,297	49,016
2018	13,209	28,990	48,633
2019	13,123	28,986	48,612
2020	12,223	26,093	43,658

Change, 2019 to 2020: - -900 -2,893 -4,954

Note: 2020 data is preliminary and will be revised.

Source: Quarterly Census of Employment and Wages, US Bureau of Labor Statistics, July 2021



Industry Distribution of Jobs in 2020

Industry Sector	Allegany County		Cattaraugus County		Chautauqua County	
	Jobs	%	Jobs	%	Jobs	%
Total	12,222	100.0%	26,092	100.0%	43,658	100.0%
Agriculture, Forestry, Fishing and Hunting	154	1.3%	290	1.1%	572	1.3%
Mining	19	0.2%	111	0.4%	83	0.2%
Utilities	74	0.5%	61	0.2%	239	0.5%
Construction	352	2.9%	600	2.3%	1,587	3.3%
Manufacturing	1,454	11.9%	2,843	10.9%	8,847	18.2%
Wholesale Trade	204	1.7%	416	1.6%	1,016	2.1%
Retail Trade	1,067	8.7%	3,289	12.6%	6,299	12.9%
Transportation & Warehousing	235	1.9%	555	2.1%	1,327	2.7%
Information	87	0.7%	142	0.5%	521	1.1%
Finance and Insurance	185	1.5%	654	2.5%	789	1.6%
Real Estate and Rental and Leasing	46	0.4%	187	0.7%	404	0.8%
Professional, Scientific, and Technical Services	240	2.0%	456	1.7%	799	1.6%
Management of Companies and Enterprises	51	0.4%	134	0.5%	321	0.7%
Admin. & Support & Waste Mgt. & Rem. Services	178	1.5%	751	2.9%	1,658	3.4%
Educational Services	1,104	9.0%	0	0.0%	4,764	9.8%
Health Care and Social Services	1,446	11.8%	8	2.3%	7,732	15.9%
Arts, Entertainment, and Recreation	56	0.5%	228	0.9%	698	1.4%
Accommodation and Food Services	1,046	8.6%	2,632	8.7%	4,706	9.7%
Other Services (Except Public Administration)	419	3.4%	1,013	3.9%	1,874	3.8%
Public Administration	17	0.1%	3,500	13.4%	2,808	5.8%
Unallocated	10	0.1%	16	0.1%	53	0.1%

N/A: data not available

Source: US Bureau of Labor Statistics (www.statsamerica.org)



STW Region Employment by Sector
(1,000's)

	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2015</u>	<u>2019</u>	<u>2020</u>
Total Nonfarm	105.1	104.5	110.3	108.3	105.6	99.3	96.0	80.8
Total Private	83.9	82.9	85.6	82.2	79.0	74.6	71.6	63.1
Goods Producing	30.4	26.0	25.8	21.5	19.5	18.1	16.6	15.5
Service-Providing	74.7	78.5	84.5	86.8	86.0	81.2	79.5	65.3
Private Service-Providing	53.5	56.8	59.8	60.8	59.6	56.6	55.1	47.8
Natural Resources, Mining and Construction	3.7	2.9	3.1	3.1	3.9	2.9	2.9	3.1
Manufacturing	26.7	23.0	22.7	18.4	15.6	15.2	13.6	12.4
Trade, Transportation, and Utilities	18.4	18.2	18.1	17.8	15.8	15.5	14.6	13.2
Information	1.9	1.5	1.4	1.3	1.0	0.9	0.8	0.6
Financial Activities	2.6	2.4	2.5	2.5	2.5	2.4	2.3	2.1
Professional and Business Services	3.9	5.2	5.7	5.2	5.4	5.3	4.7	4.6
Education and Health Services	13.6	15.6	16.6	17.9	19.8	19.2	16.6	14.6
Leisure and Hospitality	9.0	9.3	9.9	9.9	9.3	10.1	10.2	7.8
Other Services	4.2	4.7	5.5	6.1	5.8	3.2	5.9	4.7
Government	21.2	21.6	24.8	26.1	26.5	24.5	24.4	17.7

Percentage Change in Employment by Sector, STW Region, 1990 to 2020
(1990 and 2020 data enumerated in 1,000's)

	<u>1990</u>	<u>2020</u>	<u>Percentage Change, 1990 to 2020</u>
Total Nonfarm	105.1	80.8	-23.1%
Total Private	83.9	63.1	-24.8%
Goods Producing	30.4	15.5	-49.0%
Service-Providing	74.7	65.3	-12.6%
Private Service-Providing	53.5	47.8	-10.7%
Natural Resources, Mining and Construction	3.7	3.1	-16.2%
Manufacturing	26.7	12.4	-53.6%
Trade, Transportation, and Utilities	18.4	13.2	-28.3%
Information	1.9	0.6	-68.4%
Financial Activities	2.6	2.1	-19.2%
Professional and Business Services	3.9	4.6	17.9%
Education and Health Services	13.6	14.6	7.4%
Leisure and Hospitality	9.0	7.8	-13.3%
Other Services	4.2	4.7	11.9%
Government	21.2	17.7	-16.5%

Source for data in both tables on this page: New York State Department of Labor; regional calculations and percentage calculations by Southern Tier West



Percentage Change in Employment by Sector, 1990 to 2017

	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>	<u>STW Region</u>
Total Nonfarm	-3.2%	-4.0%	-10.3%	-7.3%
Total Private	-7.8%	-16.7%	-12.9%	-13.3%
Goods Producing	-41.5%	-53.9%	-39.7%	-44.1%
Service-Providing	11.2%	15.0%	2.5%	7.8%
Private Service-Providing	10.7%	3.7%	2.7%	4.1%
Natural Resources, Mining and Construction	-42.9%	-11.1%	-19.0%	-21.6%
Manufacturing	-41.2%	-58.8%	-41.8%	-46.8%
Trade, Transportation, and Utilities	-23.8%	-14.5%	-21.3%	-19.6%
Information	-50.0%	-60.0%	-58.3%	-57.9%
Financial Activities	50.0%	28.6%	-29.4%	-7.7%
Professional and Business Services	150.0%	-6.7%	27.3%	20.5%
Education and Health Services	25.0%	25.0%	73.3%	46.3%
Leisure and Hospitality	27.3%	15.4%	1.9%	8.9%
Other Services	0.0%	10.0%	-33.3%	-19.0%
Government	12.2%	40.8%	2.0%	17.0%

Source: New York State Department of Labor; regional calculations and percentage calculations by Southern Tier West



Sectoral Employment, 2019 and 2020

Sector	Allegany County		Cattaraugus County		Chautauqua County		STW Region		Percentage Loss, STW Region, 2019 to 2020
	2019	2020	2019	2020	2019	2020	2019	2020	
Total Nonfarm	15,000	13,900	30,300	27,400	50,700	45,300	96,000	86,600	-9.8%
Total Private	10,500	9,600	20,500	18,700	40,600	35,600	71,600	63,900	-10.8%
Goods Producing	2,200	1,900	3,700	3,600	10,700	9,800	16,600	15,300	-7.8%
Service Providing	12,800	12,100	26,600	23,800	40,100	35,400	79,500	71,300	-10.3%
Private Service Providing	8,400	7,700	16,800	15,100	29,900	25,800	55,100	48,600	-11.8%
Natural Resources, Mining and Construction	400	400	700	700	1,800	1,700	2,900	2,800	-3.4%
Manufacturing	1,700	1,500	3,000	2,900	8,900	8,200	13,600	12,600	-7.4%
Trade, Transportation, and Utilities	1,600	1,500	4,600	4,200	8,400	7,700	14,600	13,400	-8.2%
Information	100	100	200	100	500	400	800	600	-25.0%
Financial Activities	300	200	900	800	1,100	1,100	2,300	2,100	-8.7%
Professional and Business Services	500	500	1,400	1,400	2,800	2,500	4,700	4,400	-6.4%
Education and Health Services	3,500	3,400	4,700	4,500	8,400	7,400	16,600	15,300	-7.8%
Leisure and Hospitality	1,400	1,200	3,200	2,600	5,600	4,200	10,200	8,000	-21.6%
Other Services	1,000	800	1,900	1,600	3,000	2,400	5,900	4,800	-18.6%
Government	4,400	4,400	9,800	8,700	10,200	9,700	24,400	22,800	-6.6%

Source: NYS DOL, August 2021; regional totals and percentages calculated by Southern Tier West



Top Twenty Industry Clusters by Employment, Southern Tier West Region

<u>Industry Cluster</u>	<u>Employment</u>	<u>Average Wage</u>
Local Education and Training	10,675	\$46,996
Local Health Services	10,574	\$46,967
Government	10,186	\$55,469
Local Hospitality Establishments	8,135	\$17,536
Local Real Estate, Construction, and Development	4,710	\$54,515
Education and Knowledge Creation	3,838	\$68,297
Local Food and Beverage Processing and Distribution	3,544	\$32,167
Local Community and Civic Organizations	3,349	\$28,037
Production Technology and Heavy Machinery	3,290	\$80,483
Local Motor Vehicle Products and Services	3,193	\$35,333
Local Commercial Services	2,640	\$46,521
Hospitality and Tourism	2,386	\$36,048
Food Processing and Manufacturing	2,263	\$56,783
Local Logistical Services	2,017	\$48,559
Downstream Metal Products	1,556	\$61,839
Local Personal Services (Non-Medical)	1,411	\$25,690
Business Services	1,253	\$64,006
Local Financial Services	1,250	\$61,241
Distribution and Electronic Commerce	1,198	\$77,194
Local Household Goods and Services	1,032	\$33,079

Source: [IBRC](http://www.irbc.indiana.edu) modeled estimates (www.irbc.indiana.edu). This file was downloaded from *STATS Indiana*.

Notes: This region includes these counties: Allegany NY, Cattaraugus NY, Chautauqua NY. These industry cluster definitions are not the same as NYS DOL, BEA, BLS, NAICS, and Census definitions. These cluster definitions do not pick up synergies related to the relative strategic importance of the cluster in the region (e.g., **location quotient**). The selected cluster represented in this table contain all industry clusters with more than 1,000 persons employed in the region.



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**.

Per Capita Personal Income (PCPI)

	Allegany County		Cattaraugus County		Chautauqua County	
	Number	Percent of U.S.	Number	Percent of U.S.	Number	Percent of U.S.
2019	\$36,164	64.0%	\$41,774	73.9%	\$42,355	76.7%
2009	\$27,406	69.8%	\$31,820	81.0%	\$30,084	70.3%
1999	\$19,058	66.5%	\$21,152	73.8%	\$21,257	75.9%
1989	\$12,838	68.7%	\$14,154	75.8%	\$15,046	81.4%
10-Year % Change	32.0%		31.3%		40.8%	
20-Year % Change	89.8%		97.5%		99.3%	
30-Year % Change	181.7%		195.1%		181.5%	

Source: U.S. Bureau of Economic Analysis (www.statsamerica.org)

Per Capita Personal Income

	1970	1975	1980	1985	1990	1995	2000	2005	2010	2019
Allegany County	\$3,216	\$4,510	\$ 6,968	\$ 9,667	\$13,495	\$16,289	\$19,758	\$23,194	\$28,527	\$36,164
Cattaraugus County	\$3,324	\$4,915	\$ 7,619	\$10,921	\$14,821	\$17,690	\$21,801	\$27,698	\$34,860	\$41,774
Chautauqua County	\$3,717	\$5,350	\$ 8,519	\$12,198	\$15,625	\$18,573	\$21,977	\$25,981	\$31,628	\$42,355
Southern Tier West Region	\$3,516	\$5,069	\$7,965	\$11,350	\$14,991	\$17,884	\$21,519	\$25,989	\$32,035	\$41,032
New York	\$4,935	\$7,066	\$10,994	\$16,796	\$23,986	\$27,604	\$35,307	\$41,578	\$49,582	\$71,682
United States	\$4,196	\$6,312	\$10,150	\$14,717	\$19,584	\$23,551	\$30,587	\$35,888	\$40,144	\$56,490

Per Capita Personal Income as a Percentage of NYS Per Capita Personal Income

	1970	1975	1980	1985	1990	1995	2000	2005	2010	2019
Allegany County	65.17%	63.83%	63.38%	57.56%	56.26%	59.01%	55.96%	55.78%	57.53%	50.45%
Cattaraugus County	67.36%	69.56%	69.30%	65.02%	61.79%	64.08%	61.75%	66.62%	70.31%	58.28%
Chautauqua County	75.32%	75.71%	77.49%	72.62%	65.14%	67.28%	62.25%	62.49%	63.79%	59.09%
Southern Tier West Region	71.25%	71.74%	72.45%	67.58%	62.50%	64.79%	60.95%	62.51%	64.61%	57.24%



Per Capita Personal Income as a Percentage of US Per Capita Personal Income

	<u>1970</u>	<u>1975</u>	<u>1980</u>	<u>1985</u>	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2019</u>
Allegany County	76.64%	71.45%	68.65%	65.69%	68.91%	69.16%	64.60%	64.63%	71.06%	64.02%
Cattaraugus County	79.22%	77.87%	75.06%	74.21%	75.68%	75.11%	71.28%	77.18%	86.84%	73.95%
Chautauqua County	88.58%	84.76%	83.93%	82.88%	79.78%	78.86%	71.85%	72.39%	78.79%	74.98%
Southern Tier West Region	83.79%	80.31%	78.47%	77.12%	76.55%	75.94%	70.35%	72.42%	79.80%	72.64%

Source for above three tables: U.S. Bureau of Economic Analysis (www.statsamerica.org)

Note: All dollar estimates are in current dollars (not adjusted for inflation).

Last updated: July 2021

Median Income

	<u>Allegany County</u>		<u>Cattaraugus County</u>		<u>Chautauqua County</u>	
	<u>Number</u>	<u>Percent of U.S.</u>	<u>Number</u>	<u>Percent of U.S.</u>	<u>Number</u>	<u>Percent of U.S.</u>
Median Household Income (2019)	\$49,411	75.2%	\$50,783	77.3%	\$50,143	76.3%
Median Household Income (2000)	\$32,876	78.3%	\$34,673	82.6%	\$34,422	82.0%
Percent Change from 2000 to 2019	50.3%		46.5%		45.7%	

Source: U.S. Census Bureau (www.statsamerica.org)

Poverty Estimates

	<u>Allegany County</u>		<u>Cattaraugus County</u>		<u>Chautauqua County</u>	
	<u>Number</u>	<u>Percent Change</u>	<u>Number</u>	<u>Percent Change</u>	<u>Number</u>	<u>Percent Change</u>
Poverty Rate in 2019	17.9%	--	14.7%	--	16.2%	--
Poverty Rate In 2000	15.4%	16.2%	12.8%	14.8%	13.5%	31.1%
Poverty Rate for Children under 18 in 2019	26.8%	--	21.5%	--	24.4%	--
Poverty Rate for Children under 18 In 2000	20.9%	28.2%	18.3%	17.5%	19.7%	39.6%

Source: U.S. Census Bureau (www.statsamerica.org)

Note: Per the US Census Bureau, the official USA poverty rate in 2019 was 10.5 %.



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 inside 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.
- **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.

Presence of a Computer and Broadband Internet Subscription in Household

	<u>Allegany County</u>	<u>Cattaraugus County</u>	<u>Chautauqua County</u>	<u>New York State</u>	<u>USA</u>
Households with a computer, 2015 – 2019	85.1%	82.4%	85.5%	89.5%	90.3%
Households with a broadband internet subscription, 2015 – 2019	75.1%	71.7%	76.2%	82.8%	82.7%

Source: U.S. Census Bureau Quick Facts, 2015 – 2019

- **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. 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.
- 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.
- **Median housing prices** are significantly lower than State and national median housing prices. 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 low relative 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.



Housing Data, 2015 - 2019

Selected Housing Characteristics

	<u>Allegany County</u>		<u>Cattaraugus County</u>		<u>Chautauqua County</u>		<u>New York State</u>		<u>United States</u>	
	<u>Estimate</u>	<u>Percent</u>	<u>Estimate</u>	<u>Percent</u>	<u>Estimate</u>	<u>Percent</u>	<u>Estimate</u>	<u>Percent</u>	<u>Estimate</u>	<u>Percent</u>
HOUSING OCCUPANCY										
Total housing units	26,373	100%	41,596	100%	67,645	100%	8,322,722	100%	137,428,986	100%
Occupied housing units	17,948	68.1%	31,779	76.4%	53,075	78.5%	7,343,234	88.2%	120,756,048	87.9%
Vacant housing units	8,425	31.9%	9,817	23.6%	14,570	21.5%	979,488	11.8%	16,672,938	12.1%
Homeowner vacancy rate	2.5	(X)	2.3	(X)	2.0	(X)	1.7	(X)	1.6	(X)
Rental vacancy rate	9.4	(X)	6.1	(X)	5.1	(X)	4.2	(X)	6.0	(X)
UNITS IN STRUCTURE										
Total housing units	26,373	100%	41,596	100%	67,645	100%	8,322,722	100%	137,428,986	100%
1-unit, detached	18,923	71.8%	27,961	67.2%	46,344	68.5%	3,485,263	41.9%	84,644,765	61.6%
1-unit, attached	181	0.7%	1,201	2.9%	1,092	1.6%	420,388	5.1%	8,048,562	5.9%
2 units	970	3.7%	2,703	6.5%	7,005	10.4%	852,305	10.2%	4,901,645	3.6%
3 or 4 units	884	3.4%	1,594	3.8%	3,967	5.9%	583,635	7.0%	5,980,355	4.4%
5 to 9 units	488	1.9%	1,125	2.7%	1,690	2.5%	433,678	5.2%	6,482,753	4.7%
10 to 19 units	236	0.9%	356	0.9%	1,126	1.7%	346,185	4.2%	6,096,972	4.4%
20 or more units	317	1.2%	1,130	2.7%	2,020	3.0%	2,007,034	24.1%	12,652,982	9.2%
Mobile home	4,362	16.5%	5,518	13.3%	4,380	6.5%	191,403	2.3%	8,495,408	6.2%
Boat, RV, van, etc.	12	0.0%	8	0.0%	21	0.0%	2,831	0.0%	125,544	0.1%
YEAR STRUCTURE BUILT										
Total housing units	26,373	100%	41,596	100%	67,645	100%	8,322,722	100%	137,428,986	100%
Built 2014 or later	202	0.8%	383	0.9%	633	0.9%	93,176	1.1%	3,399,842	2.5%
Built 2010 to 2013	377	1.4%	615	1.5%	522	0.8%	129,774	1.6%	3,690,038	2.7%
Built 2000 to 2009	1,830	6.9%	3,050	7.3%	3,615	5.3%	521,540	6.3%	19,186,932	14.0%
Built 1990 to 1999	2,782	10.5%	4,471	10.7%	4,588	6.8%	514,763	6.2%	19,072,607	13.9%
Built 1980 to 1989	2,628	10.0%	4,537	10.9%	5,269	7.8%	628,022	7.5%	18,455,307	13.4%
Built 1970 to 1979	3,929	14.9%	5,392	13.0%	6,187	9.1%	825,965	9.9%	20,877,555	15.2%
Built 1960 to 1969	2,266	8.6%	2,594	6.2%	5,758	8.5%	1,039,518	12.5%	14,526,829	10.6%
Built 1950 to 1959	2,152	8.2%	3,501	8.4%	9,417	13.9%	1,221,584	14.7%	14,142,147	10.3%
Built 1940 to 1949	1,662	6.3%	2,735	6.6%	5,605	8.3%	678,200	8.1%	6,748,599	4.9%
Built 1939 or earlier	8,545	32.4%	14,318	34.4%	26,051	38.5%	2,670,180	32.1%	17,329,130	12.6%
ROOMS										
Total housing units	26,373	100%	41,596	100%	67,645	100%	8,322,722	100%	137,428,986	100%
1 room	993	3.8%	922	2.2%	1,468	2.2%	354,072	4.3%	3,221,756	2.3%
2 rooms	1,027	3.9%	1,009	2.4%	1,154	1.7%	324,425	3.9%	3,733,354	2.7%
3 rooms	2,282	8.7%	3,085	7.4%	4,564	6.7%	1,250,090	15.0%	12,420,476	9.0%
4 rooms	3,505	13.3%	5,754	13.8%	9,138	13.5%	1,542,053	18.5%	22,397,458	16.3%
5 rooms	4,376	16.6%	7,519	18.1%	12,378	18.3%	1,352,903	16.3%	26,938,522	19.6%
6 rooms	4,157	15.8%	8,639	20.8%	13,141	19.4%	1,232,584	14.8%	24,448,207	17.8%
7 rooms	3,538	13.4%	5,782	13.9%	9,608	14.2%	841,257	10.1%	16,588,406	12.1%
8 rooms	2,801	10.6%	3,976	9.6%	7,343	10.9%	623,810	7.5%	11,926,429	8.7%
9 rooms or more	3,694	14.0%	4,910	11.8%	8,851	13.1%	801,528	9.6%	15,754,378	11.5%
Median rooms	5.7	(X)	5.8	(X)	5.9	(X)	5.0	(X)	5.5	(X)
BEDROOMS										
Total housing units	26,373	100%	41,596	100%	67,645	100%	8,322,722	100%	137,428,986	100%
No bedroom	1,010	3.8%	993	2.4%	1,519	2.2%	406,465	4.9%	3,537,750	2.6%
1 bedroom	2,997	11.4%	4,450	10.7%	6,575	9.7%	1,567,648	18.8%	14,856,137	10.8%
2 bedrooms	6,779	25.7%	10,815	26.0%	18,268	27.0%	2,224,267	26.7%	35,658,445	25.9%
3 bedrooms	10,334	39.2%	17,366	41.7%	28,101	41.5%	2,623,390	31.5%	54,129,990	39.4%
4 bedrooms	3,874	14.7%	6,146	14.8%	9,854	14.6%	1,145,009	13.8%	23,108,958	16.8%
5 or more bedrooms	1,379	5.2%	1,826	4.4%	3,328	4.9%	355,943	4.3%	6,137,706	4.5%

**HOUSING TENURE**

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	7,343,234	100%	120,756,048	100%
Owner-occupied	13,678	76.2%	22,778	71.7%	36,755	69.3%	3,957,802	53.9%	77,274,381	64.0%
Renter-occupied	4,270	23.8%	9,001	28.3%	16,320	30.7%	3,385,432	46.1%	43,481,667	36.0%
Average household size										
of owner-occupied unit	2.40	(X)	2.45	(X)	2.42	(X)	2.74	(X)	2.70	(X)
Average household size										
of renter-occupied unit	2.11	(X)	2.08	(X)	2.08	(X)	2.41	(X)	2.49	(X)

YEAR HOUSEHOLDER MOVED INTO UNIT

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	7,343,234	100%	120,756,048	100%
Moved in 2017 or later	1,050	5.9%	2,406	7.6%	4,190	7.9%	574,521	7.8%	12,473,785	10.3%
Moved in 2015 to 2016	1,976	11.0%	3,690	11.6%	5,678	10.7%	885,800	12.1%	18,386,854	15.2%
Moved in 2010 to 2014	3,594	20.0%	6,636	20.9%	11,652	22.0%	1,674,406	22.8%	29,508,361	24.4%
Moved in 2000 to 2009	4,499	25.1%	7,670	24.1%	12,577	23.7%	1,810,100	24.6%	29,185,078	24.2%
Moved in 1990 to 1999	2,651	14.8%	4,772	15.0%	7,460	14.1%	1,068,196	14.5%	15,322,077	12.7%
Moved in 1989 and earlier	4,178	23.3%	6,605	20.8%	11,518	21.7%	1,330,211	18.1%	15,879,893	13.2%

VEHICLES AVAILABLE

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	57,343,234	100%	120,756,048	100%
No vehicles available	1,541	8.6%	3,421	10.8%	6,314	11.9%	2,134,145	29.1%	10,395,713	8.6%
1 vehicle available	6,122	34.1%	11,455	36.0%	19,754	37.2%	2,399,878	32.7%	39,521,096	32.7%
2 vehicles available	6,827	38.0%	11,706	36.8%	18,856	35.5%	1,904,686	25.9%	44,954,436	37.2%
3 or more vehicles available	3,458	19.3%	5,197	16.4%	8,151	15.4%	904,525	12.3%	25,884,803	21.4%

HOUSE HEATING FUEL

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	7,343,234	100%	120,756,048	100%
Utility gas	9,254	51.6%	16,674	52.5%	35,596	67.1%	4,345,992	59.2%	57,912,923	48.0%
Bottled, tank, or LP gas	2,161	12.0%	4,429	13.9%	4,286	8.1%	295,680	4.0%	5,751,556	4.8%
Electricity	2,054	11.4%	4,292	13.5%	7,968	15.0%	868,765	11.8%	46,931,885	38.9%
Fuel oil, kerosene, etc.	1,207	6.7%	2,120	6.7%	1,320	2.5%	1,521,756	20.7%	5,731,088	4.7%
Coal or coke	487	2.7%	436	1.4%	105	0.2%	17,658	0.2%	119,029	0.1%
Wood	2,499	13.9%	3,251	10.2%	2,625	4.9%	126,612	1.7%	2,181,082	1.8%
Solar energy	5	0.0%	11	0.0%	33	0.1%	6,040	0.1%	181,691	0.2%
Other fuel	264	1.5%	497	1.6%	954	1.8%	81,447	1.1%	585,399	0.5%
No fuel used	17	0.1%	69	0.2%	188	0.4%	79,284	1.1%	1,361,395	1.1%

SELECTED CHARACTERISTICS

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	7,343,234	100%	120,756,048	100%
Lacking complete plumbing facilities	253	1.4%	495	1.6%	294	0.6%	28,723	0.4%	468,497	0.4%
Lacking complete kitchen facilities	399	2.2%	613	1.9%	655	1.2%	56,558	0.8%	1,003,980	0.8%
No telephone service available	786	4.4%	1,071	3.4%	1,215	2.3%	133,718	1.8%	2,317,813	1.9%

OCCUPANTS PER ROOM

Occupied housing units	17,948	100%	31,779	100%	53,075	100%	7,343,234	100%	120,756,048	100%
1.00 or less	17,704	98.6%	31,160	98.1%	52,305	98.5%	6,968,303	94.9%	116,710,069	96.6%
1.01 to 1.50	181	1.0%	330	1.0%	492	0.9%	232,184	3.2%	2,744,718	2.3%
1.51 or more	63	0.4%	289	0.9%	278	0.5%	142,747	1.9%	1,301,261	1.1%

VALUE

Owner-occupied units	13,678	100%	22,778	100%	36,755	100%	3,957,802	100%	77,274,381	100%
Less than \$50,000	3,225	23.6%	3,822	16.8%	5,854	15.9%	174,241	4.4%	5,335,889	6.9%
\$50,000 to \$99,999	6,208	45.4%	9,641	42.3%	15,506	42.2%	390,206	9.9%	9,308,841	12.0%
\$100,000 to \$149,999	2,035	14.9%	4,401	19.3%	6,411	17.4%	427,791	10.8%	10,243,084	13.3%
\$150,000 to \$199,999	1,036	7.6%	2,325	10.2%	4,282	11.7%	380,735	9.6%	10,855,013	14.0%
\$200,000 to \$299,999	677	4.9%	1,647	7.2%	2,938	8.0%	538,749	13.6%	15,151,292	19.6%
\$300,000 to \$499,999	340	2.5%	674	3.0%	1,121	3.0%	904,539	22.9%	14,948,354	19.3%
\$500,000 to \$999,999	137	1.0%	227	1.0%	445	1.2%	838,701	21.2%	8,821,114	11.4%
\$1,000,000 or more	20	0.1%	41	0.2%	198	0.5%	302,840	7.7%	2,610,794	3.4%
Median (dollars)	76,400	(X)	88,100	(X)	88,000	(X)	313,700	(X)	217,500	(X)



MORTGAGE STATUS

Owner-occupied units	13,678	100%	22,778	100%	36,755	100%	3,957,802	100%	77,274,381	100%
Housing units with a mortgage	6,141	44.9%	11,077	48.6%	18,731	51.0%	2,406,639	60.8%	48,416,627	62.7%
Housing units without a mortgage	7,537	55.1%	11,701	51.4%	18,024	49.0%	1,551,163	39.2%	28,857,754	37.3%

SELECTED MONTHLY OWNER COSTS (SMOC)

Housing units with a mortgage

6,141	100%	11,077	100%	18,731	100%	2,406,639	100%	48,416,627	100%	
Less than \$500	220	3.6%	314	2.8%	609	3.3%	20,940	0.9%	569,949	1.2%
\$500 to \$999	2,875	46.8%	4,468	40.3%	8,789	46.9%	265,018	11.0%	8,242,060	17.0%
\$1,000 to \$1,499	2,007	32.7%	4,076	36.8%	5,741	30.6%	441,170	18.3%	13,248,839	27.4%
\$1,500 to \$1,999	651	10.6%	1,385	12.5%	2,077	11.1%	375,393	15.6%	10,169,830	21.0%
\$2,000 to \$2,499	262	4.3%	376	3.4%	804	4.3%	324,566	13.5%	6,274,095	13.0%
\$2,500 to \$2,999	75	1.2%	260	2.3%	419	2.2%	289,382	12.0%	3,841,335	7.9%
\$3,000 or more	51	0.8%	198	1.8%	292	1.6%	690,170	28.7%	6,070,519	12.5%
Median (dollars)	997	(X)	1,076	(X)	998	(X)	2,155	(X)	1,595	(X)

Housing units without a mortgage

7,537	100%	11,701	100%	18,024	100%	1,551,163	100%	28,857,754	100%	
Less than \$250	717	9.5%	1,414	12.1%	2,028	11.3%	120,821	7.8%	3,280,798	11.4%
\$250 to \$399	2,353	31.2%	3,038	26.0%	5,300	29.4%	164,149	10.6%	6,626,535	23.0%
\$400 to \$599	2,380	31.6%	3,916	33.5%	6,251	34.7%	283,565	18.3%	8,240,068	28.6%
\$600 to \$799	1,355	18.0%	1,928	16.5%	2,576	14.3%	245,049	15.8%	4,798,691	16.6%
\$800 to \$999	399	5.3%	910	7.8%	982	5.4%	201,144	13.0%	2,497,499	8.7%
\$1,000 or more	333	4.4%	495	4.2%	887	4.9%	536,435	34.6%	3,414,163	11.8%
Median (dollars)	453	(X)	464	(X)	443	(X)	772	(X)	500	(X)

SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)

Housing units with a mortgage (excluding units where SMOCAPI cannot be computed)

6,113	100%	11,054	100%	18,624	100%	2,396,173	100%	48,182,974	100%	
Less than 20.0 percent	3,349	54.8%	6,158	55.7%	10,610	57.0%	986,389	41.2%	22,126,044	45.9%
20.0 to 24.9 percent	784	12.8%	1,699	15.4%	2,377	12.8%	355,518	14.8%	7,584,745	15.7%
25.0 to 29.9 percent	500	8.2%	883	8.0%	1,578	8.5%	253,655	10.6%	5,072,173	10.5%
30.0 to 34.9 percent	348	5.7%	526	4.8%	935	5.0%	176,324	7.4%	3,330,974	6.9%
35.0 percent or more	1,132	18.5%	1,788	16.2%	3,124	16.8%	624,287	26.1%	10,069,038	20.9%
Not computed	28	(X)	23	(X)	107	(X)	10,466	(X)	233,653	(X)

Housing unit without a mortgage (excluding units where SMOCAPI cannot be computed)

7,429	100%	11,556	100%	17,801	100%	1,533,564	100%	28,463,029	100%	
Less than 10.0 percent	3,139	42.3%	4,603	39.8%	7,747	43.5%	566,975	37.0%	12,785,829	44.9%
10.0 to 14.9 percent	1,535	20.7%	2,583	22.4%	3,368	18.9%	288,461	18.8%	5,523,287	19.4%
15.0 to 19.9 percent	932	12.5%	1,356	11.7%	2,051	11.5%	182,394	11.9%	3,154,745	11.1%
20.0 to 24.9 percent	544	7.3%	865	7.5%	1,520	8.5%	118,620	7.7%	1,916,515	6.7%
25.0 to 29.9 percent	357	4.8%	551	4.8%	872	4.9%	79,522	5.2%	1,235,715	4.3%
30.0 to 34.9 percent	235	3.2%	348	3.0%	492	2.8%	57,231	3.7%	836,924	2.9%
35.0 percent or more	687	9.2%	1,250	10.8%	1,751	9.8%	240,361	15.7%	3,010,014	10.6%
Not computed	108	(X)	145	(X)	223	(X)	17,599	(X)	394,725	(X)

GROSS RENT

Occupied units paying rent

3,842	100%	8,279	100%	15,192	100%	3,266,361	100%	41,311,872	100%	
Less than \$500	816	21.2%	2,064	24.9%	3,253	21.4%	345,383	10.6%	3,865,037	9.4%
\$500 to \$999	2,538	66.1%	5,354	64.7%	10,019	65.9%	770,486	23.6%	14,956,085	36.2%
\$1,000 to \$1,499	435	11.3%	708	8.6%	1,690	11.1%	894,812	27.4%	12,403,502	30.0%
\$1,500 to \$1,999	33	0.9%	95	1.1%	151	1.0%	617,336	18.9%	5,796,670	14.0%
\$2,000 to \$2,499	15	0.4%	48	0.6%	52	0.3%	298,715	9.1%	2,324,841	5.6%
\$2,500 to \$2,999	5	0.1%	0	0.0%	27	0.2%	145,134	4.4%	987,766	2.4%
\$3,000 or more	0	0.0%	10	0.1%	0	0.0%	194,495	6.0%	977,971	2.4%
Median (dollars)	658	(X)	655	(X)	659	(X)	1,280	(X)	1,062	(X)
No rent paid	428	(X)	722	(X)	1,128	(X)	119,071	(X)	2,169,795	(X)



GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRAPI)

Occupied units paying rent (excluding units where GRAPI cannot be computed)

	3,719	100%	8,173	100%	14,959	100%	3,190,799	100%	40,366,338	100%
Less than 15.0 percent	630	16.9%	1,436	17.6%	2,089	14.0%	443,831	13.9%	5,296,041	13.1%
15.0 to 19.9 percent	542	14.6%	936	11.5%	2,064	13.8%	371,387	11.6%	5,195,435	12.9%
20.0 to 24.9 percent	299	8.0%	979	12.0%	1,482	9.9%	369,035	11.6%	5,190,296	12.9%
25.0 to 29.9 percent	361	9.7%	994	12.2%	1,386	9.3%	340,767	10.7%	4,681,621	11.6%
30.0 to 34.9 percent	348	9.4%	630	7.7%	1,278	8.5%	289,988	9.1%	3,674,673	9.1%
35.0 percent or more	1,539	41.4%	3,198	39.1%	6,660	44.5%	1,375,791	43.1%	16,328,272	40.5%
Not computed	551	(X)	828	(X)	1,361	(X)	194,633	(X)	3,115,329	(X)

Data Source: U.S. Census Bureau, 2015-2019 American Community Survey 5-Year Estimates, Selected Housing Characteristics

- Regional residents typically have access to high quality **health care**, either within the region or by traveling to larger municipalities outside the region. However, certain 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.
- 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.
- 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 economic development (tourism).
- 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** contributes to less corporate commitment to 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. 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 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 machinery manufacturing; fabricated metal product manufacturing; glass and ceramics; agribusiness, food processing and technology; and forest and wood products. 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.
- The **region's most significant occupation clusters** are agribusiness and food technology; primary/secondary and vocational education, remediation and social services; postsecondary education; public safety and domestic security' personal services occupations, skilled production workers, and health care. 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, and manufacturer’s associations and consulting organizations) **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 a subsequent chapter of this CEDS, “Vision / Goals / Objectives / Priority Strategic Foci / Strategies.”



Strategic Target Clusters

This section of the CEDS identifies the industry sectors (“clusters”) in which the region has a preponderance of economic activity (strategic industry clusters) or in which the region has significant labor force available (occupation clusters). These clusters have been identified through data-based location quotient analysis. These strategic target clusters are clusters in which the region should direct its economic development investment to have the maximum impact (i.e., asset-based development)

Industry Clusters:

- Machinery manufacturing
- Fabricated metal product manufacturing
- Glass and ceramics
- Agribusiness, food processing and technology
- Forest and wood products
- Arts, entertainment, recreation, and visitor industries (i.e., including tourism)

Occupation Clusters:

- Agribusiness and food technology
- Primary/secondary and vocational education, remediation, and social services (i.e., schools)
- Postsecondary education and knowledge creation (i.e., colleges)
- Public safety and domestic security
- Personal services occupations
- Skilled production workers
- Health care and medical science (therapy, counseling, and rehabilitation)



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 (i.e., avoidance or mitigation or minimization in advance of a natural disaster) and response to a disaster. Additionally, the focus herein is on the 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 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 the FEMA and NYS Office of Emergency Management 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, damage to publicly owned assets 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.

Obviously, in 2020 the overriding natural disaster and ensuing economic dislocation is that associated with the coronavirus pandemic. Again, here the region is 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 take the forefront in this region as well as in regions across the entire nation.



Economic Disruptions Arising from Other Than Natural Disasters

Other types of economic disruptions can be just as damaging to local and regional economies as can 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:
 - Excessive 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 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 relating to natural disasters. Determine 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 so as to avoid disruption of local business operations. Implement these mitigation projects. 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 act 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
 - 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
 - Establishing formalized mechanisms to realign and retrain any 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 the focus of the 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:

- 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.
- 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.

- 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, 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.

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.

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, that 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



Vision / Goals / Objectives / Priority Strategic Foci / Strategies

This following is the **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., 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.

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.**

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.)

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**

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

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)

Action Plan

The CEDS action plan answers the question “How do we get there?” The CEDS action plan is a portfolio of potential initiatives and projects – consistent with the above goals, objectives, and strategies – that herein are identified formally as being primary actions for achieving the region’s goals.

The action plan identifies – for each of the thirty-two strategies identified above – a list of representative potential initiatives and/or projects, the primary stakeholder(s) responsible for the implementation of the initiatives/projects, a timetable for the implementation of initiatives/projects, and the opportunities for the integrated use of other 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, objectives, and strategies (see above). However, the thirty-two strategies, and the individual initiatives for each of the thirty-two strategies, are not prioritized or ranked in any order.

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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 work 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.

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

Timetable: Ongoing

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.

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.

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

Timetable: Ongoing

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.**

Responsibility: 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)

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.).



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

Timetable: Ongoing

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.).

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

Timetable: Ongoing

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.)



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.

Responsibility: County economic development organizations, Southern Tier West RPDB
Timetable: Ongoing
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.

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

Timetable: Ongoing

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.

Responsibility: 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
Timetable: Ongoing
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.

Responsibility: County governments and economic development organizations, educational institutions, local/community development organizations, business community, State and federal business development agencies, Southern Tier West RPDB
Timetable: Ongoing
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.

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

Timetable: Ongoing

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.

Responsibility: 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

Timetable: Ongoing

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 business persons 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

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.

Responsibility: 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

Timetable: Ongoing

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.

Responsibility: 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:

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

Responsibility: 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

Timetable: Ongoing



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.

Responsibility: 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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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.

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

Timetable: Ongoing

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

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.

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

Timetable: Ongoing

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.

Responsibility: 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

Timetable: Ongoing

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.

Responsibility: 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

Timetable: Ongoing

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.

32. Resilience Building Initiatives

Responsibility: 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

Timetable: Ongoing

Funding: Various local, state, and federal funds

Examples of potential initiatives/projects:

- Create county-level networks, that 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



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), and (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 2021 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 two exceptions, all of the projects in this EDA priority project list are seeking EDA public works funding; the two exceptions are a Cattaraugus County project seeking EDA Economic Adjustment Assistance and 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.

Allegany County

1. **Alfred-Almond Sewer Project**

Description: Construction of intermunicipal wastewater collection system
Sponsor: TBD
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

2. **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: TBD
Date: 2022

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: 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: 2021

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: 2022

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: 2022

Regional Projects

1. 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: 2021

2. 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: 2021



Priority ARC Projects

The second project list is a list of projects that the Southern Tier West Board designated in July 2021 as being economic development priorities for funding by ARC. The projects in this list are listed in descending priority as designated by the Southern Tier West Board.

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

Diesel Power Systems Laboratory for Skilled Workforce Development

Sponsor: Alfred State College of Technology – Wellsville Campus
Total Cost: \$214,305; funding sources: ARC, \$150,000, ASC, \$64,805, other TBD
Job Impact: TBD; 60 students trained
Date: 2022

Cattaraugus Career Academies

Sponsor: Southern Tier West RPDB
Total Cost: \$109,400; funding sources: ARC, \$54,700, STW RPDB/volunteers/partners, \$54,700
Job Impact: TBD, 35-40 students trained
Date: 2022

Workforce Infrastructure & Training Initiative through Allegany County Public Libraries

Sponsor: Southern Tier Library System
Total Cost: \$187,569; funding sources: ARC, \$125,300, STLS, \$62,269
Job Impact: TBD; will assist 41,952 job seekers, and 5,752 jobs seekers are projected to gain employment
Date: 2022

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

Onoville Marina Park Interpretive Kiosk System & Education Curriculum

Sponsor: Cattaraugus County Economic Development, Planning, and Tourism (EDTP)
Total Cost: \$43,200.00; funding sources: ARC, \$21,600, EDTP, \$21,600
Job Impact: TBD
Date: 2022

Activation of Chadakoin & Comedy Center Riverfront

Sponsor: National Comedy Center
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



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 2022). As noted above, this third list includes the designated EDA and ARC priority projects indicated above.

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 five sections: Allegany County Projects, Cattaraugus County Projects, Chautauqua County Projects, Regional Projects, and Seneca Nation of Indians Projects. There is no explicit ranking of projects within any of these five sections; however, the highest priority projects within each section are highlighted in yellow and appear at the top of the list in each of the five sections. Also, projects generally are grouped together with other similar projects within each of the five sections (e.g., infrastructure projects are grouped together, etc.). Otherwise, there is no other ordering or ranking within a given section, or as between the five sections.

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). (Exception: Projects sponsored by the Seneca Nation of Indians may involve creation or retention of jobs provided by the Seneca Nation of Indians or one of its affiliated corporations, which may or may not be thought of as being public sector jobs.)

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

Alfred-Almond Sewer Project

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

Crossroads Development Infrastructure System Project

Sponsor: Allegany County
Total cost: TBD; funding sources: TBD
Job impact: 500 C / 10 R
Date: 2022

Diesel Power Systems Laboratory for Skilled Workforce Development

Sponsor: Alfred State College of Technology – Wellsville Campus
Total Cost: \$214,305; funding sources: ARC, \$150,000, ASC, \$64,805, other TBD
Job Impact: TBD; 60 students trained
Date: 2022

Workforce Infrastructure & Training Initiative through Allegany County Public Libraries

Sponsor: Southern Tier Library System
Total Cost: \$187,569; funding sources: ARC, \$125,300, STLS, \$62,269
Job Impact: TBD; will assist 41,952 job seekers, and 5,752 jobs seekers are projected to gain employment
Date: 2022

Alfred Center for Technology Transfer Project

Sponsor: Allegany County
Total cost: TBD; funding sources: TBD
Job impact: 120 C / 10 R
Date: 2022

Alfred University Integrated Manufacturing Center Project

Sponsor: Alfred University
Job impact: 7 C
Total cost: \$10,050,000; funding sources: TBD
Date: 2022

Workforce Development Through Refrigeration Training Enhancements

Sponsor: Alfred State College of Technology – HVAC Training Program
Total Cost: \$214,000; funding sources: ARC \$150,000, applicant \$64,000
Job Impact: 120 C
Date: 2023

Crossroads Development Infrastructure System Project

Sponsor: Allegany County
Job impact: 500 C / 10 R
Total cost: TBD
Date: 2022



Crossroads Business Park Foreign Trade Zone / Sub-zone Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$45,000; funding sources TBD
Job impact: 20 C, 5 R
Date: 2023

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

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

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

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

Crossroads Water Tank Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$1,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Friendship to Amity Sewer Line Project

Sponsor: Allegany Crossroads Development LDC
Total Cost: \$8,500,000; funding sources TBD
Job impact: TBD
Date: 2023

Crossroads Business Park Hotel Development Project

Sponsor: Allegany County Industrial Development Agency
Total Cost: \$15,000,000; funding sources TBD
Job impact: TBD
Date: TBD

Crossroads Electric Rebuild Project

Sponsor: Allegany County IDA
Total Cost: \$38,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Broadband/Fiber Optic Project

Sponsor: Southern Tier West RPDB
Total Cost: \$20,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Alfred Village Water Supply Upgrade Project

Sponsor: Village of Alfred
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023



Alfred Business Development Assistance Project

Sponsor: Village of Alfred
Total Cost: \$250,000; funding sources TBD
Job impact: TBD
Date: 2023

Alfred Development and Implementation of Revitalization Plan and Initiatives

Sponsor: Village of Alfred, public/private partnership
Total Cost: \$30,000; funding sources TBD
Job impact: TBD
Date: 2023

Alfred Main and University Streets Improvements Project

Sponsor: Village of Alfred
Total Cost: \$625,000; funding sources TBD
Job impact: TBD
Date: 2023

Alfred Reconstruction of Route 244

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

Alfred Sewer System Project: C9-6601-04-00

Sponsor: Village of Alfred
Total Cost: \$1,509,000; funding sources TBD
Job impact: TBD
Date: 2023

Alfred Wastewater Treatment Plant Upgrade Project

Sponsor: Village of Alfred
Total Cost: \$5,000,000; funding sources TBD
Job impact: 1000 R
Date: 2023

Alfred Wastewater Treatment Sludge Digester Renovation Project

Sponsor: Village of Alfred
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Sugar Hill Industrial Park Development Project, Phase 2

Sponsor: Sugar Hill Development Corporation
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023



Sugar Hill Water Tank Project

Sponsor: TBD
Total Cost: \$900,000; funding sources TBD
Job impact: 20 C, 50 R
Date: 2023

Allentown School Renovation and Reuse Project

Sponsor: Town of Alma
Total Cost: \$3,000,000; funding sources TBD
Job impact: 30 C
Date: 2023

Almond Wastewater System Improvements Project

Sponsor: Village of Almond
Total Cost: \$2,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Almond Wastewater System Improvements Project with New Line from Alfred

Sponsor: Village of Almond
Total Cost: \$9,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Almond Distribution Upgrade Project Phase 3

Sponsor: Village of Almond
Total Cost: \$257,500; funding sources TBD
Job impact: TBD
Date: 2023

Almond Water Storage and Distribution System Project Phase 2

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

Almond Water Districts

Sponsor: Town of Almond
Total Cost: \$75,000; funding sources TBD
Job impact: TBD
Date: 2023

Almond Water Treatment Plant and Storage Upgrade

Sponsor: Village of Almond
Total Cost: \$922,000; funding sources TBD
Job impact: TBD
Date: 2023

Almond Water Project

Sponsor: Village and Town of Almond
Total Cost: \$600,000; funding sources TBD
Job impact: TBD
Date: 2023



Andover Main Street Project

Sponsor: Village of Andover
Total Cost: \$250,000; funding sources TBD
Job impact: TBD
Date: 2023

Andover New Water Treatment Plant and Upgrade Project

Sponsor: Village of Andover
Total Cost: \$4,500,000; funding sources TBD
Job impact: TBD
Date: 2023

Andover Public Water Project

Sponsor: Village of Andover
Total Cost: \$11,200,000; funding sources TBD
Job impact: TBD
Date: 2023

Andover Wastewater System Improvements Project

Sponsor: Village of Andover
Total Cost: \$1,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Andover Water Source Project

Sponsor: Village of Andover
Total Cost: \$3,299,000; funding sources TBD
Job impact: TBD
Date: 2023

Andover Public Sewer System

Sponsor: Village of Andover
Total Cost: \$1,950,000; funding sources TBD
Job impact: TBD
Date: 2023

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

Sponsor: Village of Andover
Total Cost: \$18,827,000; funding sources TBD
Job impact: TBD
Date: 2023

Angelica School Restoration/Renovation Project

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



Belfast Water Distribution Project

Sponsor: Town of Belfast
Total Cost: \$2,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Belmont Water Distribution System Upgrade Project

Sponsor: Village of Belmont
Total Cost: \$405,827; funding sources TBD
Job impact: TBD
Date: 2023

Belmont Water Distribution Project

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

Belmont School Restoration/Renovation Project

Sponsor: New LDC
Total Cost: \$9,800,000; funding sources TBD
Job impact: 100 C
Date: 2023

Bolivar 4" Water Main Replacement Project

Sponsor: Village of Bolivar
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Bolivar Village New Water Storage and System Project

Sponsor: Village of Bolivar
Total Cost: \$788,500; funding sources TBD
Job impact: TBD
Date: 2023

Bolivar Water System Upgrade Project

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

Bolivar Sewer System Line Replacement and Relining Project

Sponsor: Village of Bolivar
Total Cost: \$750,000; funding sources TBD
Job impact: TBD
Date: 2023

Bolivar Water Reservoir Renovation Project

Sponsor: Village of Bolivar
Total Cost: \$700,000; funding sources TBD
Job impact: TBD
Date: 2023



Bolivar -Richburg Pleasant Valley Water Project

Sponsor: Village of Bolivar and Village of Richburg and Towns adjacent.
Total Cost: \$5,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Canaseraga Water Distribution System Project

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

Canaseraga Downtown Revitalization: Downtown Shopping Opportunities Development

Sponsor: Village of Canaseraga, Private/Public Partnership
Total Cost: \$50,000; funding sources TBD
Job impact: TBD
Date: 2023

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

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

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

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

Centerville Establish Wind Turbine Cooperative

Sponsor: Town of Centerville
Total Cost: \$10,000; funding sources TBD
Job impact: TBD
Date: 2023

Cuba Hospital/Stonebridge Crossing [Independent & Assisted Living Complex]

Sponsor: Cuba Hospital
Total Cost: \$15,000,000; funding sources TBD
Job impact: 35 C, 240 R
Date: 2023



Cuba Landmark Connections to Greenway Project

Sponsor: Village of Cuba
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Cuba Main Street Enhancement Project

Sponsor: Village of Cuba
Total Cost: \$702,000; funding sources TBD
Job impact: TBD
Date: 2023

Cuba Wastewater Collection and Treatment System Improvements Project

Sponsor: Village of Cuba
Total Cost: \$72,100; funding sources TBD
Job impact: TBD
Date: 2023

Cuba Water System Upgrade Project

Sponsor: Village of Cuba
Total Cost: \$896,820; funding sources TBD
Job impact: TBD
Date: 2023

Cuba Watermain Replacement Project

Sponsor: Village of Cuba
Total Cost: \$1,500,000; funding sources TBD
Job impact: TBD
Date: 2023

Friendship Wastewater Treatment Plant Upgrade Project

Sponsor: Town of Friendship
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Friendship Downtown Revitalization Project

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

Friendship Water Project

Sponsor: Friendship Water District
Total Cost: \$1,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Friendship Water Source and Distribution System Project

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



Friendship Water Hydrant Replacement

Sponsor: Town of Friendship
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Friendship/Cuba Multi-Tenant Facility Project

Sponsor: ACCORD Corporation
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Hume Water Project

Sponsor: Town of Hume
Total Cost: \$3,787,000; funding sources TBD
Job impact: TBD
Date: 2023

Hume N. Genesee/W. Main Water Lines

Sponsor: Town of Hume
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

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

Sponsor: Town of Hume
Total Cost: \$3,787,000; funding sources TBD
Job impact: TBD
Date: 2023

Richburg Drinking Water System Improvements Project

Sponsor: Village of Richburg
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Richburg Waterline Replacement Project

Sponsor: Village of Richburg
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Rushford Wastewater System Project

Sponsor: Town of Rushford
Total Cost: \$2,000,000; funding sources TBD
Job impact: TBD
Date: 2023



Rushford Lake District Wastewater System Project

Sponsor: Town of Rushford
Total Cost: \$4,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Rushford School Building Reuse Project

Sponsor: Town of Rushford
Total Cost: \$1.750,000; funding sources TBD
Job impact: 30 C
Date: 2023

Swain - Canaseraga Sewer Mainline and Collection System Project

Sponsor: Allegany County IDA
Total Cost: \$2,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Sewer Collection System Update Project

Sponsor: Village of Wellsville
Total Cost: \$2,000,000; funding sources TBD
Job impact: TBD
Date: 2023

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

Sponsor: Village of Wellsville
Total Cost: \$7,733,250; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Wastewater Treatment Plant Update Project

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

Wellsville Water Distribution System Extensions on Wightman Road and Truax Area

Sponsor: Town of Wellsville
Total Cost: \$1,500,000; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Water Distribution System Update Project

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

Wellsville Water Supply Extension Project

Sponsor: Town of Wellsville
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023



Wellsville Water Treatment Plant Update Project

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

Wellsville Mainline Bridge Obstruction Remediation Project

Sponsor: Southern Tier Extension Railroad Authority
Total Cost: TBD; funding sources: NYS DOT, WNYP RR, other sources TBD
Job impact: TBD
Date: 2023

Wellsville Morningside District Wastewater Collection System Project

Sponsor: Town of Wellsville
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Village New Water Storage Project

Sponsor: Village of Wellsville
Total Cost: \$1,177,000; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Water Distribution System Extension Project

Sponsor: Town of Wellsville
Total Cost: \$867,106; funding sources TBD
Job impact: TBD
Date: 2023

Wellsville Water Project 2 Distribution System Extension Project

Sponsor: Town of Wellsville
Total Cost: \$1,192,450; funding sources TBD
Job impact: TBD
Date: 2023

West Almond Trail Upgrade Project

Sponsor: NYSDEC
Total Cost: \$1,456,000; funding sources TBD
Job impact: TBD
Date: 2023

Alle-Catt Wind Farms Windmill Project

Sponsor: Invenergy
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023



Access to Self Sufficiency and Economic Security Project

Sponsor: ACCORD Corporation
Total Cost: \$129,000; funding sources TBD
Job impact: TBD
Date: 2023

Agricultural Marketing Opportunities Project

Sponsor: Private/Public Partnership
Total Cost: \$100,000; funding sources TBD
Job impact: TBD
Date: 2023

Agricultural Public Outreach Programs

Sponsor: Cornell Cooperative Extension
Total Cost: \$100,000; funding sources TBD
Job impact: TBD
Date: 2023

Allegany County Small Business RLF Project

Sponsor: Allegany County Office of Development
Total Cost: \$400,000; sources: GOSC Small Cities
Job impact: TBD
Date: 2022

Biomass Recover for Farms and Recycled Materials

Sponsor: Cornell Cooperative Extension
Total Cost: \$50,000; funding sources TBD
Job impact: TBD
Date: 2023

Food Processing Facility for Organic/Sustainable Farming

Sponsor: Private/Public Partnership
Total Cost: \$125,000; funding sources TBD
Job impact: TBD
Date: 2023

Low Tech Incubator in a Hub Community

Sponsor: Allegany County IDA
Total Cost: \$400,000; funding sources TBD
Job impact: TBD
Date: 2023

Reuse of Existing Underutilized Facilities and Properties [Brownfields]

Sponsor: Allegany County Office of Development
Total Cost: \$150,000; funding sources TBD
Job impact: TBD
Date: 2023

STAR Career Pathways Project

Sponsor: Literacy West
Total Cost: \$150,000; funding sources TBD
Job impact: 60 C
Date: 2023



Barrelhouse Convention Center Project

Sponsor: Allegany Trails
Total Cost: \$8,000,000; funding sources TBD
Job impact: TBD
Date: 2023

Genesee River Wilds Pocket Parks Project

Sponsor: Genesee River Wilds, Inc.
Total Cost: \$100,000; funding sources TBD
Job impact: TBD
Date: 2023

Genesee River Wilds Park Project

Sponsor: Genesee River Wilds, Inc.
Total Cost: \$300,000; funding sources TBD
Job impact: TBD
Date: 2023

Creation of a New State Forest in Allegany County

Sponsor: NYSDEC
Total Cost: TBD; funding sources TBD
Job impact: TBD
Date: 2023



Cattaraugus County Projects

Great Lakes Cheese Infrastructure Project

Sponsor: Cattaraugus County / Town of Franklinville
Total cost: TBD; funding sources: 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: 2021

Onoville Marina Expansion Project

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

Onoville Marina Park Interpretive Kiosk System & Education Curriculum

Sponsor: Cattaraugus County Economic Development, Planning, and Tourism (EDTP)
Total Cost: \$43,200.00; funding sources: ARC, \$21,600, EDTP, \$21,600
Job Impact: TBD
Date: 2022

Cattaraugus Career Academies

Sponsor: Southern Tier West RPDB
Total Cost: \$109,400; funding sources: ARC, \$54,700, STW RPDB/volunteers/partners, \$54,700
Job Impact: TBD, 35-40 students trained
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: 2021

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: 2021

Salamanca (City) State Park Avenue Upgrade Project

Sponsor: City of Salamanca
Total cost: \$4,000,000; funding sources: TBD
Job impact: TBD
Date: 2021



Ellicottville (Town) Regional Water Project

Sponsor: Town of Ellicottville
Total cost: \$5.3 million; funding sources: TBD
Job impact: 196 C
Date: 2021 Construction / 2023 Completion

Olean Business Incubation Center Project Phase 2

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

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: 2021

Pathways to Success: Seneca Nation Arts and Crafts Tourism Initiative

Sponsor: Seneca Iroquois National Museum
Total Cost: \$78,832; funding sources: ARC \$39,416, applicant \$39,416
Job Impact: 10 C
Date: 2021

Historic Hollywood Theater Project

Sponsor: Gowanda's Historic Hollywood Theater, Ltd.
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Allegany (Village) Municipal Water System Project

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

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

North Union Street Streetscape

Sponsor: City of Olean
Total cost: \$900,000; funding sources: DRI
Job Impact: TBD
Date: 2021-2022

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: 2022

Walkable Olean Phase III (East State Street)

Sponsor: City of Olean
Total cost: \$1,200,000; funding sources: DRI
Job Impact: TBD
Date: 2021-2022

Oak Hill Park Improvements

Sponsor: City of Olean
Total cost: \$350,000; funding sources: DRI
Job Impact: TBD
Date: 2021-2022

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: 2022

Comprehensive Water Distribution System Plan

Sponsor: City of Olean
Total Cost: \$40,000; funding sources: NYS ESD, Cattaraugus County
Job Impact: TBD
Date: 2022



Downtown Revitalization & Rehabilitation Fund

Sponsor: City of Olean & Olean Business Development
Total cost: \$600,000
Job Impact: TBD
Date: 2021-2022

Olean Downtown Revitalization Project Phase 2

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

Seneca Allegany Boulevard Access Road Project

Sponsor: City of Salamanca
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Ashford (Town) Water System Upgrade Project

Sponsor: Town of Ashford
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

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: 2021

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: 2021

Cultural and Performing Arts Center Planning Project

Sponsor: Tri-County Arts Council
Total cost: TBD; funding sources: TBD
Job impact: N/A
Date: 2022

Cultural and Performing Arts Center Construction Project

Sponsor: Tri-County Arts Council
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2023

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: 2021



Chautauqua County Projects

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: 2022

Site Acquisition and Infrastructure Development

Sponsor: Chautauqua County IDA/Chautauqua County
Total Cost: TBD
Job Impact: TBD
Date: 2022

Travel and Tourism Recovery Initiative

Sponsor: Chautauqua County IDA/Chautauqua County
Job Impact: TBD
Total Cost: TBD
Date: 2022

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

Activation of Chadakoin & Comedy Center Riverfront

Sponsor: National Comedy Center
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

Northern Chautauqua County Industrial Park Expansion Project

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

Ripley Gateway Project

Sponsor: Chautauqua County
Total Cost: TBD
Job Impact: TBD
Date: 2022



Jamestown YMCA

Sponsor: YMCA/Chautauqua County IDA
Job Impact: TBD
Total Cost: TBD
Date: 2022

Silver Creek Senior Housing Apartments

Sponsor: Chautauqua County IDA
Job Impact: ?
Total Cost: \$23.8 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
Date: 2021

Develop Right-Sized Industrial Spec Building

Sponsor: Chautauqua County
Total cost: TBD; funding sources: TBD
Job impact: 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 Sewer Integration Project

Sponsor: Chautauqua County Sewer Agency / Chautauqua County
Total cost: \$40,000,000 to \$60,000,000; funding sources: USDA RD, EDA, ARC, NYS ESD, NYS DEC, NYS EFC, NYS DHCR, local public
Job impact: TBD
Date: 2021

Northern Chautauqua County Water District Project

Sponsor: Chadwick Bay Regional Development Corporation
Total cost: \$36,000,000; funding sources: TBD
Job impact: TBD
Date: 2021



Dunkirk Harbor Breakwater Extension Project

Sponsor: Chautauqua County
Total cost: TBD; funding sources: TBD – Follow up with Dave on how much was earmarked
Job impact: TBD
Date: 2021

Edgewood Redevelopment (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: 2021

Ripley Interstate Site Infrastructure Project

Sponsor: Chautauqua County IDA
Total cost: TBD; funding sources: TBD
Job impact: 300 C - 600 C
Date: 2021

Chautauqua County Airports Strategic Plan Implementation & Capital Improvements

Sponsor: Chautauqua County
Total cost: TBD; funding sources: TBD – Follow up with Dave on how much was earmarked
Job impact: TBD
Date: 2021

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: 2021

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

Chautauqua Institution Master Plan Implementation Project

Sponsor: Chautauqua Institution/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: 2021



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: 2021

Hispanic Success Center Project

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

Making It Real: Girls & Manufacturing Project

Sponsor: Dream It Do It WNY
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Mason Industrial Park Expansion Project

Sponsor: Chautauqua County IDA
Total cost: \$2,500,000; 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

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: 2021

Riverfront Development Property Acquisition Project

Sponsor: City of Jamestown
Total Cost: \$1,400,000; funding source: NYS \$1,400,000
Job impact: TBD
Date: 2021

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: 2021



Westfield Business Park Project

Sponsor: Westfield Development Corporation
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Routes 5 & 20, Irving Area Commercial Development Project

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

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: 2021

Barcelona Harbor to Chautauqua Institution Shared Use Trail Project

Sponsor: Chautauqua County Department of Planning and Economic Development
Total cost: \$3 - 5 million; funding sources: TBD
Job impact: 40 - 50 C
Date: 2021

North County Harbor Study Project

Sponsor: Chautauqua County
Total Cost: TBD
Job Impact: TBD
Date: 2021

Lake Shore Dr. Mixed Use Project

Sponsor: City of Dunkirk
Total Cost: \$2,500,000; funding source: ESD and Private
Job Impact: TBD
Date: 2021

Route 5 Complete Streets Project

Sponsor: City of Dunkirk
Total Cost: \$1,500,000; funding source: TBD
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: 2021

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: 2021

E. Lake Road Water Extension Project

Sponsor: Town of Westfield
Total cost: \$2,500,000; funding sources: TBD
Job impact: TBD
Date: 2021

Westfield Water System Improvements Project

Sponsor: Village of Westfield
Total cost: \$2,378,900; funding sources: TBD
Job impact: TBD R / TBD C
Date: 2021

Phase II - Implementation of the Northern Chautauqua County LWRP

Sponsor: Chautauqua County
Total cost: \$100,000; funding sources: TBD
Sponsor: TBD
Date: 2022

Welch Field Facilities Upgrade Project

Sponsor: Village of Westfield
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Recreational Dredging Project (Sunset Bay at Cattaraugus Creek)

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

Recreational Dredging Project (Dunkirk Harbor)

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

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: 2021



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: 2021

Westfield Train Station Passenger Stop Project

Sponsor: Westfield Development Corporation
Total cost: TBD; sources: TBD
Job impact: 10 - 20 C
Date: 2021

Lucy Trail Boardwalk Project

Sponsor: Village of Celoron
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2021

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: 2021

Westfield Main Street Revitalization – Phase II Project

Sponsor: Chautauqua Opportunities, Inc. / Village of Westfield
Total cost: \$250,000; funding sources: TBD
Job impact: TBD
Date: 2021

Westfield Pedestrian Hub and Municipal Parking Lot Upgrade Project

Sponsor: Village of Westfield
Total cost: \$424,925; funding sources: TBD
Job impact: TBD
Date: 2021

Rural Areas Revitalization Project

Sponsor: Chautauqua Opportunities, Inc.
Total cost: \$200,000; funding sources: TBD
Job impact: TBD
Date: 2021

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: 2021



Chadakoin River Strategic Business Implementation

Sponsor: Chautauqua County Industrial Development Agency/ Gebbie Foundation/ City of Jamestown/ BPU
Total cost: \$55,000; funding sources: CCIDA, Gebbie Foundation, City of Jamestown, multiple private partners
Job impact: TBD
Date: 2021

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: 2021

Arcade Building Redevelopment Project

Sponsor: Home Leasing
Total cost: TBD
Job impact: TBD
Date: 2021

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: 2021

Unite North Main Gateway Corridor Implementation

Sponsor: Chautauqua County Industrial Development Agency/ Gebbie Foundation/ City of Jamestown/ BPU/JRC
Total cost: TBD
Job impact: TBD
Date: 2021

Riverwalk Illumination Project

Sponsor: City of Jamestown
Total cost: TBD; funding sources: DRI
Job impact: TBD
Date: 2021



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: 2022

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: 2022

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: 2022

Commercial Bio-Refinery Resource Assessment Project

Sponsor: Seneca Trail Resource Conservation & Development
Total cost: TBD; funding sources: TBD
Job impact: TBD
Date: 2022

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 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

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: 2021

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: 2021

Business Risk Assessment Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2021

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: 2021

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: 2021

Surge Capital/Credit Fund Project

Sponsor: County P&D, County IDA, Southern Tier West
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Community Infrastructure/Asset Mitigation Project

Sponsor: Municipalities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2021

Utility/Broadband Infrastructure Mitigation Project

Sponsor: Private Utilities
Total cost: \$ TBD; funding sources: TBD
Job impact: TBD
Date: 2021



Performance Measures

The implementation schedule for the CEDS (i.e., when projects are projected to be implemented) can act as the evaluation framework for the CEDS. However, because timely implementation 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 schedule 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 2021 CEDS is an update of the 2020 CEDS. The 2020 CEDS had been revised in several ways:

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

The 2021 CEDS update includes:

- Updated and current demographic and economic data
- Revised descriptive narrative
- Updated project lists

In 2020, 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, the workforce development agencies, the major cities, major development groups, and the general public, asking for participation, and for a list of currently planned economic development projects in their jurisdictions. The Southern Tier West Board also was asked for input during the revision process.

In 2021, 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, and for a list of currently planned economic development projects in their jurisdictions. The Southern Tier West Board also was asked for input during the revision process.

Members of the 2020 CEDS Strategy Committee

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 Program 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 Community 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

The Southern Tier West Board also:

- At its July 2021 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 are listed in the CEDS.
- At its July 2021 Board meeting, the Southern Tier West Board prioritized projects for FY22 ARC funding. These ARC priority projects are listed in the CEDS.

The entire draft 2021 CEDS was placed on the Southern Tier West web site in August 2021 for a 30-day public review and comment period, and the Southern Tier West Board approved a finalized version of the 2021 CEDS at its September 2021 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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Southern Tier West Regional Planning and Development Board

Board of Directors

As of September 2021, 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
Pierre Chagnon	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 2021, 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 its 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 area's 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.